

Research Report

An Assessment of the Visual Arts in South Africa

a research project conducted by

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Art Source

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ACRONYMS

AMERU	African Micro Economic Research Unit, Wits University
ACT	Arts and Culture Trust
AVA	Association for Visual Arts
BASA	Business Art South Africa
DAC	Department of Arts and Culture
DALRO	Dramatic, Artistic and Literary Rights Organisation
DIRCO	Department of International Relations and Cooperation
DoBE	Department of Basic Education
DoE	Department of Education
DoHA	Department of Home Affairs
DoHE	Department of Higher Education
DoL	Department of Labour
DoT	Department of Tourism
dti	Department of Trade and Industry
GAI	Global Art Information
GCMP	Gauteng Creative Mapping Project
GSARC	Gauteng Department of Sports, Arts, Recreation and Culture
HSRC	Human Sciences Research Council
IKS	Indigenous Knowledge Systems
KZNSA	Kwazulu Natal Society for the Arts
NAC	National Arts Council
NLDTF	National Lottery Distribution Trust Fund
NRF	National Research Foundation
SAAID	South African Art Information Directory
SANAVA	South African National Association for the Visual Arts
SETA	Sector Education and Training Authority
VANSA	Visual Arts Network of South Africa
UNCTAD	United Nations Conference on Trade and Development
WIPO	World Intellectual Property Rights Organisation

EXECUTIVE SUMMARY

“For South Africa to fulfill its potential, the country needs to imagine itself as an “Afropolitan” nation, the avant-garde of a version of the African modern that is already in evidence in most contemporary African artistic and cultural forms. The country also needs to distance itself from an understanding of culture as pastness, a simple matter of customs and traditions, monuments and museums. We have to realise that culture is not yet another form of “service delivery”. It is the way human beings imagine and engage their own futures. Without this dimension of futurity and imagination, we can hardly write a name we can call ours or articulate a voice we can recognise as our own.” – Achille Mbembe¹, *Contemporary African Art: Negotiating the Terms of Recognition*

This document captures the comprehensive findings and recommendations from a major study of the visual arts sector commissioned by the Department of Arts and Culture (DAC) and undertaken by the Human Sciences Research Council (HSRC), working with a variety of partners. The project involved the conducting of an in-depth survey of over 350 artists, businesses and organisations working in the visual arts sector, together with a series of 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. The research project also involved the development of a database of over 6000 visual arts practitioners and 1200 business entities across South Africa.

The primary purpose of the project has been to present as accurate as possible a picture of the current position of the visual arts in South Africa, and to identify opportunities for growing the artistic, social and economic contribution of the visual arts in the society and economy. Section 8 of the report details 23 specific recommendations on measures aimed at supporting the growth, transformation and development of the sector, framed by six overarching objectives:

- Stimulating domestic and international demand for the South African visual arts
- Widening access to the experience of and participation in the visual arts
- Strengthening the organisational infrastructure that supports the visual arts
- Enhancing the social and economic position of artists
- Attracting more investment and resources into the sector
- Promoting greater coherence and cohesion in the sector and in sector-government relations

The report gives equal weight to the importance of each of these dimensions of the visual arts – while we have found that the visual arts plays a significant role in addressing the mandate of government in the social and economic realm, this contribution is predicated on there being an environment in which the exercise of the imagination and creative independence is nurtured and promoted. Aside from the important real and potential contributions that the visual arts make in, for example, education, public health and urban development, the core contribution of the sector revolves around the generation of compelling representations and propositions related to our understanding of who we are in a complex and rapidly changing world. The capacity of the work of artists to challenge our familiar and established patterns of perception and attitude, and to invoke both wonder and critical reflection, is fundamental to understanding the importance of the visual arts in a society composed of multiple identities, realities and ways of being in the world.

¹ Mbembe, A. *African Art: Negotiating the Terms of Recognition*. accessed at: <http://www.chimurenga.co.za/page-127.html>

Industry Overview

The sector encompasses a diversity of activities, ranging from the production, presentation and critical reception of highly experimental, critically engaged creative work that may deploy a very wide variety of media and techniques (the so-called 'contemporary' visual arts), through to more conventional work that uses traditional 'fine arts' media and subject matter (the so-called 'commercial' visual arts), with a wide spectrum of activity occurring between these two poles.

Partly fuelled by the unique history and contemporary realities of the South African society and economy, contemporary art in and from South Africa has achieved a significant profile globally, with a substantial number of artists being exposed on major international platforms for presentation and critical reception. In the post apartheid period, the South African visual arts have come to assume a significant position in the critical discourse on the contemporary arts, and their role and meaning in a postcolonial context. The sector has been invigorated by the emergence of a new generation of young artists, curators and entrepreneurs, who are increasingly connected into continental networks and critical forums.

The country has the most robust and structurally sophisticated visual arts economy on the continent, with an annual turnover of nearly R2 billion and a contribution of over R1 billion in added value to the national economy (R791 million of this in direct Gross Value-Added). The sector provides work and income for approximately 17 700 people in different capacities, 5 500 of these being full-time or part-time artists. The sector is composed almost entirely of small and micro-enterprises, and is largely commercially driven. While smaller than other parts of the creative industries such as book publishing and music, the economic dimensions of the sector are not insignificant, and warrant specific consideration from agencies and ministries concerned with economic development issues at a local, provincial and national level.

The sector has a highly educated workforce, with 72% of artists and 48% of employees and contract workers in businesses and organisations having qualified with a tertiary degree or diploma. There is evidence of a changing demographic within the industry, which has traditionally been largely white and middle class in profile. Based on the survey results, just over 57% of the entire workforce is black and just over 50% comprised of women. It also has a comparatively young workforce, with approximately 53,4% of people working in the sector (including artists) falling into the under-35 age group. However, while **women**, youth and black people account for a substantial proportion of employment in the sector, the senior management and ownership of businesses and organisations continues to be largely vested in white people.

The visual arts industry is overwhelming urban in character, largely concentrated in the three major metros of Johannesburg, Cape Town and Durban. Artists and businesses operating outside of these centres report substantial difficulty in developing sustainable careers and businesses, owing to their isolation from buyers, markets, skills and information. Though small in number, there are a variety of exemplary projects across the country that demonstrate the impact of the visual arts in education, urban and rural development, public health and job creation.

The report notes a lack of effective coordination in governmental engagement with the sector. Significantly, from the survey of business and organisations in the sector conducted

as part of this study, the most frequently cited major obstacle to business and organisational development (from a list of 35 possible issues) is the 'lack of industry promotion from government'. While there have been some significant initiatives and investments made within some of the metropolitan municipalities and provinces, local, provincial and national government interactions with the sector have largely occurred in isolation from one another. The coordinating and policymaking role of the national department has on the one hand historically been confined to the resourcing and arms-length oversight over a set of institutions inherited from the colonial and apartheid period, and ad-hoc investments in individual projects and initiatives on the other. The need for a more systematic engagement with the industry as a whole and the harnessing of the complementary roles of other national ministries and local and provincial government departments and agencies represents a key focus of the recommendations attached to this report.

The industry perception of disassociation from government also however needs to be balanced against the somewhat informal and unregulated character of the industry itself. Alongside the need for more coherent engagement with the sector on the part of government, there is a complementary need for industry organisations and artist associations to present a more coherent face to government, and consideration needs to be given to how these organisations can be most effectively resourced to do so without compromising their autonomy and independence.

The report proposes a set of key principles, or cross-cutting considerations, informing and shaping recommendations related to the development of the sector. Five key overarching principles are proposed:

- Regard for the core values which drive activity in the sector in the formulation of any governmental engagement or intervention within the sector: innovation, experimentalism, independence, flexibility and tolerance.
- An approach to governmental engagement which achieves a balance and integration between a concern for the intrinsic value and meaning of the visual arts and the more instrumental applications of the visual arts in education, health, urban development and so on.
- Recognition of the importance of building connection and synergy between the urban centres of the industry and the less-resourced and more rural regions of the country.
- A commitment to achieving greater equity in the sector with regard both to wider access to the enjoyment and benefits that flow from access to the visual arts for a more diverse cross-section of the population, as well as to achieving the greater empowerment of black and women artists, entrepreneurs and initiatives in the sector.
- Industry development needs to occur *with* not *for* the sector. The approach to implementing recommendations should emphasise consultation, transparency of process and accountability.

Demand for the Visual Arts

Audiences for the Visual Arts

A key finding of the report suggests that public consumption of the visual arts – whether as audiences or consumers – is much smaller than most international comparators in the developed world, and that there is a significant untapped domestic market for the visual arts. While a 2009 research report commissioned by Business Arts South Africa suggests that 3.18 million adult South Africans (slightly less than 10% of the adult population) are

‘extremely interested’ in the visual arts and between 34% and 45% of adult South Africans go to art exhibitions, analysis of primary data on attendance at public and private art museums and collections estimates that only 1,2 million South Africans of ALL ages (2% of the total population of the country) visit these institutions annually, with the likelihood of some duplications in these visitor numbers.

By comparison, a 2002 report on the visual arts in Australia indicated attendance of galleries at 6.5 million in 2001/2, with 22% of the adult population (3.2 million) visiting art galleries and 3 million attending art museums. While the study did not extend to an analysis of the population of people who actually buy visual artworks (for which there is no existing data), international studies show that this is a small proportion of those who consume the visual arts in the context of art museums and galleries.

Any strategy for the development of the visual arts in South Africa will need to have as a fundamental objective the widening of access to the experience of and participation in the visual arts. Aside from the public benefits that are associated with exposure to the visual arts, the growth and development of a domestic market will be dependent on the growth and development of a larger audience base and the integration of the visual arts into public life. This consideration has been integrated into the specific recommendations related to the market for the visual arts (Section 3), the organisational landscape for the visual arts (Section 4) and education and training in the visual arts (Section 6).

The Market for the Visual Arts

The study notes the complex articulation of roles among dealers, gallerists, auction houses, public and private museums and collections and individual artists in the sale of artwork. It has also highlighted the variety of kinds of work and associated markets that exist within the visual arts, from critically engaged ‘contemporary’ work that acquires value through a complex process of subscription involving institutions, dealers, art critics and collectors through to ‘commercial’ art with an essentially decorative function and whose value is determined through a less elaborate and more conventional supply/demand dynamic. The report also notes the general lack of regulation in the industry, with no widely accepted protocols or guidelines governing the business relationships between artists and galleries, as well as between artists and agencies of government which may seek to commission work or services from artists. A key recommendation emanating from this report concerns the development of such protocols and guidelines.

The present research project has gone some way towards quantifying the value of the market for the visual arts in South Africa, estimated to be in excess of R1 billion per annum. Turnover for sale of artworks the visual arts is valued at just over R1 billion per annum, excluding the value of auction sales – 83% of this revenue is generated from sales through galleries, and 17% from sales from artist studios and the direct commissioning of work from artists. A growing auction market for the visual arts which contributes an additional (roughly estimated) R250-500 million in gross turnover to the overall economic impact of the sector through the activities of auction houses, in the secondary market. This is less than 5% of the value of the UK auction market, suggesting that South Africa has a small but nevertheless significant developing secondary market for the visual arts relative to international comparators.

Both the domestic and international consumption base for South African visual arts is small by international standards, relative to both advanced economies and the rapidly expanding economies of India and China. As the Chinese and Indian examples make clear, growth in the

art market is very directly linked to growth in the wider economy. The development of large new strata of wealth in these countries, now spread across the globe, has fuelled both domestic and international demand for Chinese and Indian art. While South African contemporary art has a significant profile internationally, UNCTAD trade data suggests that South Africa has a very small share not only of the global market for the visual arts, but also of the developing world portion of this market. At present, very few galleries are able to promote artists that they work with or represent internationally, owing to the substantial costs associated with attendance at art fairs and other trade events. The report recommends that efforts be made to make the export promotion incentives and schemes of the Department of Trade and Industry and related agencies more accessible to entrepreneurs in the visual arts sector, and proposes greater coordination between the DAC and departments concerned with the international promotion of South Africa and tourism promotion.

The Joburg Art Fair represents a significant privately driven intervention (with some support from the Gauteng provincial government) aimed at growing the market for the contemporary visual arts. The Art Fair has both demonstrated that the visual arts can attract very substantial audiences (with positive year-on-year audience growth between 2008 and 2010), but has also demonstrated the vulnerability of the sector to periods of economic downturn, with gallery sales in the immediate context of the Fair showing negative growth during the course of the last three years. Greater public sector investment in smart initiatives aimed at encouraging new buyers into a complex marketplace have been given priority in the recommendations attached to this report, with a view to also facilitating more targeted investment in a growing specialist art publishing sector in the country.

Public sector demand for the visual arts has principally focused around the commissioning of public art - in the inner city of Johannesburg alone, this investment is estimated as being in the region of R15 million during the course of the last five years, creating substantial work opportunities for over 200 artists during this period. The need to promote the commissioning of both temporary and permanent public art more widely – particularly on the part of local government – is indicated as a key recommendation. Similarly, the report notes the significance of the Joburg Art Bank as an important initiative both with regard to broadening demand for the work of younger and emergent artists, and for cultivating new buyers for the visual arts. Stymied by underinvestment, the report proposes that the national Department and the City of Johannesburg, together with other stakeholders, examine the feasibility of developing this as a major national scheme.

The Organisational Landscape for the Visual Arts

The report includes extended consideration of the position of a range of public and independent institutions, organisations and initiatives concerned with the wider presentation of the visual arts, the development and exposure of new talent, and the realisation of the benefits of the visual arts in the areas of education, health and broader social development. Four broad categories of infrastructure have been considered:

- Art museums and collections
- Community arts centres and arts development organisations
- Non-commercial project spaces and artist-run initiatives
- Artist associations and industry organisations

Art Museums and Collections

South Africa has a substantial and relatively well-maintained infrastructure of public art museums and institutions, containing a store of visual artworks whose value is estimated, conservatively, at R2.2 billion. However, by comparison to countries with comparable levels of public infrastructure for the visual arts (such as, for example, Australia), our national and municipal public art museums and collections are dramatically underfunded. The traditional role that public art museums play in promoting the consumption of the visual arts and in both influencing (and growing) the market for the visual arts through the direct acquisition of visual artworks is severely constrained in the South African context on account of low levels of recurrent funding for these institutions. The capacity for significant new acquisitions is negligible by even the most modest international standards – a pattern established under the apartheid government that has been largely sustained to the present day.

This study estimates that the national department of Arts and Culture invested in the region of R20 million rand in four national art museums and collections in 2008/9 – less than 5% of its total allocation of R432 million to national heritage institutions. Local government in the major metros and secondary cities collectively invested in the region of R50 million in 12 municipal museums in 2008/9. To place these figures in perspective, in the same year, the Australian government contributed A\$41.7million to the overall A\$61 million operating budget of the Australian National Gallery in Canberra in the same year – the equivalent of approximately R280 million spent on just one institution. This pattern of underinvestment is not specifically a phenomenon of the post apartheid period – it is however a pattern which has been sustained during this period.

The difficulties of public art museums and collections represent a complex public policy issue. This is partly due to the fact that they represent – in their location, built form and contents - the institutional legacy of an apartheid economy that invested significantly in a costly public arts infrastructure designed for the consumption of a minority of the population. New investment in heritage infrastructure has, unsurprisingly, been largely concentrated around new heritage projects (such as the Robben Island Museum and the Freedom Park) that engage with a political history and future orientation that is felt to have a broader resonance and audience than the historical and contemporary and visual arts can lay claim to. While these projects do have, in varying degrees, a visual arts dimension, neither the responsible departments and agencies across government nor the sector itself have managed to make a compelling case as to why the ‘inherited’ art museums and collections should also warrant new public or private investment. Further exacerbating this situation, the process of empowering a new generation of institutional leadership and management able to effectively direct and champion the interests of these institutions has been slow and uneven.

While substantial efforts have been made to transform the collections and programming of these institutions, and to mount innovative outreach and schools programmes, they have struggled to attract – from either government or the corporate/philanthropic sector – anything remotely approaching the levels of support that similar institutions in developed economies are predicated on. In spite of these disadvantages, institutions have managed to maintain a high rate of exhibitions and associated programming, providing space for the exposure of cutting edge talent within the country

The capacity of these institutions for generating revenue is also limited - on the one hand by their mandate as public institutions concerned with promoting access to the arts for all South Africans (only one charges a nominal entrance fee), and on the other by low levels of

public benefaction and the consumption associated with significant attendance levels (catering, merchandise and so on). In contrast to the United States, where corporate and individual philanthropy (assisted by generous tax incentives) has built and sustained the largest public infrastructure for the visual arts in the world, significant and sustained philanthropic support for South African museums and collections has been the exception rather than the rule, with corporates more likely to invest in their own bespoke, in-house galleries and collections. Particularly in the case of municipal institutions, the regulatory framework for public finance at a local government level establishes a variety of bureaucratic constraints around the attracting of external resources to these institutions, which the recommendations contained in this report also seek to address.

A parallel review of the policy and legislative framework for heritage institutions commissioned by the Department has recommended the development of a comprehensive funding policy for heritage institutions, which this report supports. This report further recommends that two key targets for complementary resources for these institutions that should be incorporated into the development of this funding policy are the corporate sector (for both acquisitions and capital infrastructure development) and the National Lottery Distribution Trust Fund (for capital infrastructure development and outreach programming).

Community Arts Centres and Arts Development Organisations

This report also explores the difficulties that attach to the position of an emergent national infrastructure of community arts centres and the role that this should be playing, both in supporting the provision of arts education in schools as well as in enabling wider access to the experience of and participation in the arts, particularly for communities located away from the traditional urban clusters of arts infrastructure. While the late 1990s saw significant investment in the physical infrastructure of these entities from government, these institutions – both those which are independently run and those run by local or provincial government - have struggled to attract significant and sustained investment from government, and are beset by a variety of ongoing constraints and challenges at the level of leadership, management, funding and programming. The focus on investment in capital infrastructure at the expense of investment in programming and the human infrastructure necessary to animate these centres has led to many of the centres built in the 1990s becoming proverbial ‘white elephants’.

Alongside government-owned centres, a number of old and newer non-governmental arts development organisations have developed a variety of innovative programmes concerned with the visual arts in job creation, skills development, education, public health and advocacy. In spite of their direct linkage to the social and economic development mandates of government, these organisations struggle to survive in an unstable and insecure funding environment, with limited access to reliable and recurrent sources of core organisational funding from the state, and an over-reliance on project funding from government and international agencies. This report suggests that there is in fact a sufficient pool of resources (principally within the National Lottery Distribution Trust Fund) that would enable these organisations to both survive and grow, but that these resources are not at the present time being effectively distributed or accessed. The need for greater synergy and connection between the activities of these organisations, governmental community arts centres, and the outreach programmes of public art museums and collections is also indicated as a priority.

Artist-Run Initiatives

A signal feature of the organisational landscape of the visual arts in South Africa is the near complete absence of independent and artist-run initiatives for the cultivation, presentation and promotion of innovation within the visual arts. Outside of the public and corporate museums and collections, the overwhelming majority of organisations involved in the distribution and presentation of the visual arts are commercial entities. There are only a handful of independent, artist-driven and non-profit project spaces and residency programmes around the country with a primary mission around the exposure of new talent, new ways of working and international exchange and collaboration outside of a commercial, profit-driven framework. These organisations play a critical role in the overall ecology of the visual arts, but operate within a funding environment that is inimical to not only the proliferation and growth of these entities, but also to the basic survival of the few that exist. The need to demonstrate social and economic impact attached to a lot of publicly available funding places these organisations in an even more difficult position to the aforementioned arts development organisations, as their outcomes and impacts are even more difficult to define and measure.

Artist associations such as the South African National Association for Visual Arts (SANAVA) (and its many affiliate organisations), the Kwazulu Natal Society for the Arts (KZNSA) and the Association for Visual Arts (AVA) in the Western Cape have played an important role in developing new market platforms and opportunities for artists through competitions, international exchanges, workshops and member exhibitions. The Visual Arts Network of South Africa (VANSA) has emerged in the last five years as an industry organisation concerned with policy-related issues, advocacy and industry development projects through a network of artists, curators, administrators, businesses and organisations around the country. All of these organisations face similar constraints to arts development organisations with regard to their sustainability within a difficult funding environment.

The Position of Artists

Artists constitute the core human resource that sustains the sector, generating the artworks around which the activities of the rest of the sector largely revolve. It is estimated that there are in the region of 5 500 artists in South Africa, mostly concentrated in three major metros – Johannesburg, Cape Town and Durban. While – as noted above – there is evidence of substantial shifts in the overall demographics of the workforce for the visual arts, the majority (58%) of practicing artists are white, with a particularly poor representation of black women artists (comprising just 12% of the total population of artists based on the survey commissioned as part of this project).

Though it is estimated that artists directly generate 36% of value of the overall turnover of the sector and 32% of the Gross Value-Added through direct sales and private commissions, the social and economic position of most artists in South Africa is precarious. By comparison to professionals in other fields with similar levels of experience, training and qualification, the earnings of visual artists are low with poor levels of access to various forms of personal cover and security. The study notes that the average income of practicing professional artists is in the region of R149 000 per annum, with a marked income differential between black and white artists. Based on the survey sample, white male artists (the highest earners) earn on average R229 000 per annum and black female artists (the lowest earners) earning R67 000 per annum. Within these groups, there is generally a tiny strata of high-earning artists, a small group of artists able to earn a reasonable income from their work, and a large group of artists to who rely on other sources of income for their survival.

Only 19% of all artists are able to spend more than 70% of their time on their creative work and immediately associated activities, and one in four artists report only being able to devote 25% or less of their time on their creative work. The majority of artists have to supplement their income through other activities in order to survive, and there is a marginally *negative* correlation between the proportion of time invested in core creative activity and economic return. The majority of artists are unable to afford medical cover, life insurance and the various forms of cover related to professional practice. 57% have experienced significant periods in which they have been unable to earn income during the last five years. Considering their income levels, a surprisingly large proportion (59%) report being registered for income or company tax in some form, though it is likely that much of this taxation may be in the form of ad-hoc tax deductions related to teaching and other work in the arts.

South African artists also report lower levels of gallery representation than their international counterparts, and the ratio of exhibition opportunities to artists is lower than in developed economies. Business relationships between gallerists and artists are seldom reduced to writing, and not subject to any industry-agreed (or externally imposed) standards, codes or protocols. Indeed, there is a complete vacuum in this area, with artists sometimes rendered vulnerable to the superior bargaining power of gallerists and dealers. Collection of payments related to copyright occurs on an ad-hoc basis, and it is generally only relatively established artists that are in a position to manage this issue in relation to their work, or earn any income from this source. Few artists – even more established artists – are in a position to take legal action against violations of their moral or intellectual property rights.

The survey found that the five most frequently cited obstacles to career development for artists are:

- access to funding
- the high cost of materials and supplies
- lack of demand/buyers
- lack of industry promotion from government
- a shortage of exhibition/project opportunities locally

The three most frequently cited primary professional development needs of artists were:

- learning how to market themselves more effectively,
- finding a gallerist to represent them and
- opportunities for research and study related to their practice

Assistance in obtaining funding was cited as the most significant secondary professional development need.

The report notes that the absence of a range of professional support mechanisms for artists in relation to the protection and exploitation of creative rights in their work, and the intrinsic constraints associated with collective bargaining in the visual arts owing to the self-employed status of the majority of artists. Consideration of how the economic position of artists might be improved has been integrated as a consideration into the bulk of recommendations in the report, whether through indirect measures aimed at expanding the market for their work and the creation of new platforms or through direct interventions around the professional development, the institution of collective management of copyright or legislative measures associated with resale rights.

Education and Training

The provision of education and training in the visual arts in the schooling system is arguably the single most significant area for governmental engagement in the visual arts, both in relation to the objective of nurturing the future audiences and consumers for the visual arts, as well as in achieving qualitative changes in the demographics of talent within the industry. That it is both a costly and long term area for intervention should not deter serious and urgent engagement with the many challenges that face the realisation of a quality arts education for all learners in South African schools, whether at primary or high school level.

Though the visual arts (as part of the Arts and Culture learning area) is now a compulsory component of formative education up to grade 9, the majority of schools have neither appropriately trained teachers and facilities to enable the provision of quality visual arts education at either a primary or high school level, in part the legacy of an education system which denied the majority of South Africans access to arts education.

The report also notes that the provision of specialised visual arts education at a grade 10-12 level (where it is an elective subject) continues to be largely confined to former 'Model C' schools. In 2009, less than 2% of all students took visual arts as a grade 12 subject, with 70% of all enrolments concentrated in Gauteng, Kwazulu Natal and the Western Cape. In 2009, black learners accounted for only 50% of these enrolments.

The report draws attention to the existence of a Memorandum of Understanding between the national Departments of Education and Arts and Culture, aimed at guiding their joint investment in arts education and training, as well as to a variety of policy documents produced by the (then) Department of Education which specifically promote the idea of artists working in schools in addressing the skills deficit within schools. The report notes that the implementation of a concerted strategy between the two departments for arts education at a formative level remains unrealised, and proposes that this joint engagement should be reactivated with major joint investment in programmes that widen access to participation and appreciation of the visual arts, and which create substantial work for particularly young and emergent professional visual artists. Such programmes should also harness the infrastructure and outreach programming of art museums and collections and community art centres.

While the country has a substantial network of tertiary art schools that offer internationally competitive professional degrees in the visual arts, these institutions face a number of challenges which the recommendations contained in this report seek to address:

- Art schools are mostly located in the context of historically advantaged institutions in urban areas. Art departments at institutions such as Fort Hare and Walter Sisulu University remain dramatically under-resourced by comparison to their counterparts in historically advantaged universities.
- The report notes that there is a further erosion of black intake into visual arts programmes at a tertiary level, with just over 40% of enrolling students being black and just under 40% achieving their qualifications.
- While at any one moment there are almost as many students in tertiary art schools as there are practicing artists in the industry, the attrition rate for students then actually entering the industry once they have graduated is very high. The need to for more professional development inputs, mentoring opportunities and platforms

for networking for young and recently graduated artists is indicated as a key area of recommendation.

- The staffing and infrastructure requirements of art schools in tertiary institutions are often poorly understood in the administrative contexts that they occupy. The need for more focused attention on the recognition of creative work as a research output is indicated.
- FET colleges currently play a minimal role in the provision of vocational training in the visual arts, and there is presently little or no articulation between training at an FET level, tertiary institutions and the frameworks for work-based training established through the Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority (MAPPP SETA).

Funding and Resources

Lack of access to funding is cited more frequently than any other issue as a major obstacle to career development for visual artists, and is the secondly most frequently cited obstacle for businesses and organisations.

The report notes that most of the funding mechanisms contemplated in the White Paper for Arts, Culture and Heritage have been realised, including the National Arts Council, Business Arts South Africa and the National Lottery Distribution Trust Fund. Components of this system are managing to issue increasingly significant numbers of grants to individual artists, projects and organisations. In the 2008/9 financial year, the National Arts Council distributed 91 grants with a total value of R5.6 million to the visual arts sector, many of these grants to individual artists.

Grant funding currently plays a relatively minor role in the economics of the visual arts sector, contributing less than a percentage of total industry turnover. The total value of grants issued by all national funding agencies (principally, the National Arts Council and the Lottery) as well as grants made available through national and provincial government structures in the 2008/9 financial year is estimated at R12.3 million, with an additional R3.3 million being raised from international funding sources and half a million coming from Business and Arts South Africa and the Arts and Culture Trust.

The study has found that there are very significant unlocked public resources for the visual arts, the most significant of these being the National Lottery Distribution Trust Fund (NLDTF). The study notes the alarming accumulation of unspent funding reserves within the NLDTF, and the low level of disbursement of funds to the visual arts sector. Were the NLDTF to disburse 8% of the funding available in the 2008/9 financial year to the visual arts sector (equivalent to the 2008/9 proportion of total funding allocated to the visual arts by the National Arts Council), this would equate to approximately R76 million in *entirely new investment* for public art museums and collections and their outreach programmes, public art, education and training programmes in the visual arts, visual arts-related community arts programming and infrastructure, artist-run initiatives and non-profit industry organisations. The report notes the need both a for a review of the grant administration system of the NLDTF, as well as concerted efforts to ensure that the sector engages more systematically in securing resources from the NLDTF.

While there are significant instances of corporate investment in the non-profit dimensions of the sector, and sponsorship of major events, projects and competitions such as the Joburg Art Fair, the Africa Art Centre and the Absa Atelier competition, by international standards,

the sector enjoys very low levels of corporate investment and sponsorship. Total sponsorship is estimated at between R10 and R15 million – similar to levels of public grant funding in the visual arts. The report notes the need to create more awareness around the existing provisions for tax deductibility on donations, as well as the need to explore more substantial tax benefits for artists, organisations and institutions in dialogue with the Department of Finance and SARS.

Section 1

Introduction

1.1 Background

This research report was commissioned by the national Department of Arts and Culture in order to guide its engagement with the visual arts sector at a national level. It is the first study of its kind to attempt to present a picture of the current position of the sector, based on a combination of both quantitative and qualitative research. This extensive research base has been synthesised into the analytic framework presented in this document, and been used to inform a set of policy recommendations for the DAC to take forward together with its counterparts within the provincial and local spheres of government, and with the sector itself. The findings and recommendations from this main report are intended to provide a basis for action and intervention in defined areas of need on the part of the sector and government.

Terms of Reference

The Terms of Reference for the project specified the following four outcomes:

1. the development of an authoritative picture of the visual arts sector in South Africa, addressing questions of definition, scope, size, structure and internal dynamics
2. the development of an informed analysis of the current situation of the visual arts sector, identifying strengths, weaknesses, opportunities and threats
3. the development of a set of recommendations relating to public sector engagement with the sector. These recommendations would offer a strategic framework that would identify needs in respect of: policy, legislation, institutional frameworks, programmes, and options for resourcing
4. the development of a database of roleplayers in the sector, including a register of artists based on the collation of existing data and new data created by the project

The Human Sciences Research Council was appointed to conduct the present research project in October of 2008. The HSRC contracted a team of external consultants and service providers to assist in the conducting of the primary and secondary research for the project.

Key Project Components

In fulfilment of the above, the project involved a number of key components, outlined below:

1. **Database development:** the development of a database of over 6000 artists and over 1000 businesses and organisations working in the sector
2. **Survey:** a major survey of over 350 individual artists, businesses and organisations operating in the sector focused on developing an accurate picture of:
 - o The diversity of activities in the sector
 - o The economic dimensions of the sector
 - o The operating environment
 - o The nature of the market for the visual arts
 - o The nature of work and employment in the sector
 - o The perceived obstacles and needs experienced by the industry

3. **Provincial Reports and case studies:** the commissioning of provincial reports and case studies in the provinces outside of Gauteng and the Western Cape, where the industry is most concentrated and there is substantial existing information on industry activity. The provincial reports are aimed at producing a better understanding of the spatial dimensions of the industry, and the different issues faced by artists, businesses and organisations. Case studies focused on significant visual arts-related projects, organisations and initiatives in each of these provinces.
4. **Specialist Reports:** the conducting and commissioning of specialist studies on:
 - o public and private museums and collections
 - o the funding landscape for the visual arts in South Africa
 - o education and training in the visual arts in South Africa
5. **Review of Policy and Legislative Context:** a review and analysis of the policy and legislative context for the visual arts in South Africa
6. **Review of International Comparators:** desktop research into international comparators aimed at better understanding both the global position of the South African visual arts industry, as well as providing points of reference for public sector intervention at a policy, legislative and programmatic level

The Structure of the Report

This extensive research base has been synthesised into the analytic framework presented in this document, and been used to inform a set of policy recommendations for the DAC to take forward together with its counterparts within the provincial and local spheres of government, and with the sector itself. This document provides a basis for the identification of priorities for engagement between the sector and government, and the identification of key interventions aimed at promoting the growth and development of the sector.

Section 2 of the report provides an overview of the overall workings, structure and geographical distribution of the South African visual arts, and the contribution of the sector to the South African economy, society and cultural fabric.

Sections 3-7 present a detailed consideration of different components of the visual arts system, presenting key findings from the research together with recommendations for intervention in the following areas:

- o Section 3 explores the nature of demand for the visual arts and the commercial system that supplies this demand
- o Section 4 maps the largely non-commercial organisational infrastructure that plays a complementary and supporting role in the development of the visual arts.
- o Section 5 of the report is concerned with a detailed assessment of the position of visual artists within the overall ecology of the visual arts
- o Section 6 describes and assesses the framework for the resourcing of the sector
- o Section 7 addresses the provision of visual arts education and training

The final section of the report (Section 8) is concerned with synthesising the key issues identified in the preceding sections into a set of recommendations for intervention and action on the part of the industry and government.

A number of detailed subsidiary reports have been appended which supplement the main findings of the report. These include:

- A Report on a Survey of Museums and Collections
- A Report on Education and Training in the Visual Arts
- A series of case studies relating to the social, cultural and economic impacts of the sector
- Findings from the survey of artists, business and organisations in the sector, presented in a tabular format

Reference Group and Consultation

At the inception of the project, a reference group was convened to act in an advisory capacity both on the process of the research and on the interpretation of the results of the research. This reference group was comprised of individuals, businesses and organisations from the sector, as well as representatives from national, provincial and local government, as follows:

Eric Apelgren, Director of International Relations, Ethekewini Municipality
Gabriel Clark-Brown, director of Global Art Information Directory
Ross Douglas, Director of Art Logic/the Johannesburg Art Fair
Jonathan Garnham, Chairperson of the Visual Arts Network of South (VANSA)
Anton Laubser, President of the South African National Association for the Visual Arts (SANAVA)
Moleleki Ledimo, National DAC (Arts, Social Development and Youth Directorate)
Melissa Mboweni, Director, Akani Creative Consulting
Frank Meintjies, Soul City Institute
Zayd Minty, Coordinator, Creative Cape Town, City of Cape Town
Lindi Ndebele, Creative Industries Directorate, National DAC
Andries Oberholzer, Visual Arts and Multi-Media sub-directorate, National DAC
Dawn Robertson, HOD, Gauteng Department of Sports, Arts, Recreation and Culture
Steven Sack, Director of Arts, Culture and Heritage for the City of Johannesburg

The contributions of the Reference Group to the development of this report are gratefully acknowledged. In addition to consultations with the reference group, the project has involved a large number of interactions with a wide variety of industry actors and roleplayers at both a national and provincial level. Research results were canvassed with industry participants in Gauteng in the context both of the Art Talks programme of the 2010 Johannesburg Art Fair and an industry reference group established by the Visual Arts Network of South Africa around the development of a visual arts strategy for the Gauteng City region, commissioned by the Gauteng Department of Sports, Arts, Recreation and Culture. Preliminary findings associated with the sections on museums were presented at a conference convened by the University of Cape Town in December 2009, *Managing Cultural Organisations in Times of Crisis*. Findings related to education were presented in the context of a seminar convened on the *Creative Economy and Arts Education* at the University of the Witwatersrand in August 2010. All of these consultations yielded significant questions and insights that have informed the writing of this report. It has also been clear that people within the industry recognise the significance of the research, and its potential to contribute to the visibility of the industry within government policy – an enthusiasm that needs to be capitalised on in the process of taking forward the recommendations contained in this report.

The project report has also been circulated to all of the participants in the research project for comment. One of the key recommendations from the report is that a process of further consultation will be required in testing the findings and recommendations emanating from this report, and engaging artists, associations, institutions, businesses and other industry organisations in realising the proposed recommendations.

1.2 Research Methodology

The majority of policy research, development and intervention has occurred in other parts of the cultural and creative industries, with successive reports, task groups and legislative reviews being undertaken in relation to different aspects of the music, publishing, film and craft industries, and the broader heritage sector². The only two publicly commissioned studies to date that have included specific address to the visual arts have been provincial studies that have positioned them within a wider creative industries framework³. A 2003 report commissioned from Trinity Session by the International Labour Organisation (ILO) is the only sector-specific report that addresses the visual arts that has been commissioned to date, adopting a largely qualitative research methodology in the context of a review of the visual arts and craft sector in the SADC region⁴. The present research project research represents the first significant investment in the formulation of a framework within which investment in and engagement with the visual arts sector on the part of the Department might be situated, informed by both quantitative and qualitative data.

Most studies on the arts, culture and creative industries in South Africa have noted the paucity of reliable statistical data on these industries as a central constraint for evidence-based policymaking. Internationally, the disaggregation of industry data from existing national datasets has become an increasingly important tool for industry analysis, drawing particularly on the Standard Industry Classification (SIC) and Standard Occupational Classification (SOC) codes in order to be able to measure economic outputs on the one hand (SIC) and rates of employment on the other (SOC). A key advantage of this approach is that a national dataset is updated on annual basis, and has a national compass. A recent HSRC report on the Creative Industries in South Africa notes however that “Standard taxonomies such as the SIC codes do not sufficiently disaggregate the cultural industries from other activities and are therefore insufficient for the task of collating cultural/ creative industries data for either countries, regions or areas larger than that. The bulk of the activities of the

² These include: The seminal *Cultural Industries Growth Strategy* report (1998) commissioned by the national Department, which focused on film, publishing, craft and music, together with the more broadly targeted strategy document *Creative South Africa: A strategy for Realising the Potential of the South African Creative Industries*; the DAC Music Industry Task Team established by DAC in 2001; reports by PriceWaterHouseCoopers and KPMG on the film and music industries (2000 and 2001 respectively), Customised Sector Plans for the Craft and Film Industries commissioned by the Department of Trade and Industry in 2005; an industry study of the Performing Arts Sector produced by the Performing Arts Network of South Africa in 2005.

³ In 2005 The Western Cape Department of Economic Development and Tourism commissioned a general mapping study titled *Cultural Industries, Arts, Culture And Creative Arts: Towards an understanding of the current nature and scope of the Creative Industries in the Western Cape in 2005*. In 2008, the Gauteng Department of Sports Arts Culture and Recreation commissioned a detailed mapping of the creative industries, including a section on the visual arts

⁴ Trinity Session. 2003. *Promoting the Culture Sector through Job Creation and Small Enterprise Development in SADC Countries: Crafts and Visual Arts*. International Labour Organisation Working Paper. Accessed at http://www.ilo.org/empent/Whatwedo/Publications/lang--en/docName--WCMS_117680/index.htm

creative industries remain invisible to the statistics.”⁵ In the same vein, the UNCTAD Creative Economy report notes that

“In many advanced economies, the service sector is larger and is growing at a greater rate than the manufacturing sector. However, classifications include a multitude of categories that are increasingly empty of data and a small number of categories (the service sector) that are only crudely described. This is a general problem. Arguably, the very notion of services separate from manufacture is an artefact of industrial organisation in recent years rather than a substantial economic fact. The two are clearly interrelated and to a much greater extent than the classifications represent them as being (they are usually represented as discrete). All of the issues facing the service sector can be repeated in the case of the creative industries. Thus, by definition, the numbers on the creative economy as measured by conventional means are small. When more detailed or more complex classifications have been used, researchers and politicians have been astonished to discover that the creative economy is not only a big player in economies but it is one with robust growth; moreover, it is bigger than many more ‘traditional’ industries.”⁶

Sector specific programmes of research face the challenge of the high costs associated with data collection. Within the South African creative industries, the only ongoing research project that has managed to address this need are the annual publishing industry reports commissioned through the Publishers Association of South Africa, with the support of the National Department of Arts and Culture. The great majority of studies on different aspects of the arts, cultural and creative industries in South Africa have therefore historically drawn on either qualitative data - anecdotal evidence, the perspectives of key informants, case studies and desktop research - or very narrowly defined quantitative studies as a basis for generating particular arguments for intervention at the level of policy and strategy on the part of industry and/or government.

This research project has sought to develop a picture of the visual arts sector that would serve to initiate a more evidence-based approach to policy-making, through generating both a statistical benchmark or point of reference for the analysis of the sector using a quantitative survey methodology, while also deploying more nuanced qualitative methods of data collection through case studies, desktop research, interviews with key informants and the like.

In this respect, the study has sought to build on the foundation established by the Gauteng Creative Mapping Project (GCMP) study, commissioned from Creativity, Arts, Jobs (CAJ) and the African Micro-Economic Research Umbrella (AMERU) by the Gauteng Department of Sports, Arts, Recreation and Culture, and which was completed in 2008. This study represented the first attempt to develop a comprehensive picture of particularly the economic dimensions of the creative industries, focusing on a particular region of the country. The quantitative dimensions of the present study have drawn significantly on both the approach and methodological insights generated through that study.

The primary research on which this report is based draws on a survey of over 350 individual artists, businesses and organisations working in the visual arts sector. The survey was conducted between over a six month period between July 2009 and February 2010,

⁵ CAJ/HSRC. 2008. The Creative Industries Sector Report. Study commissioned by the Department of Labour. Accessed at: http://www.labour.gov.za/downloads/documents/research-documents/Creative%20Industries_DoL_Report.pdf

⁶ UNCTAD 2008. The Creative Economy Report 2008: The Challenges of Assessing the Creative Economy: Towards Informed Policy-Making. UNCTAD: Geneva. p. 91.

including a piloting phase aimed at testing and refining the research instruments and approach. The core team contracted to the HSRC for the overall project was responsible for research design, the implementation of the survey, data analysis and report-writing. The African Micro Economic Research Unit (AMERU) at the University of the Witwatersrand provided data capturing and processing services.

Because a very significant portion of the findings presented in the present report draw on or make reference to this data, the objectives, assumptions, methods, process and limitations of this survey are briefly discussed in what follows. The tabulated findings are presented in Appendix B.

Overall Survey Objectives and Approach

In order to better understand the dynamics of the industry as whole as well as to identify areas requiring development and possible intervention, the primary objectives of the survey aimed to generate as comprehensive a picture as possible of the current position of both artists and visual arts businesses, organizations and freelance workers. The survey sought to produce an overall picture of both the economic dimensions of the visual arts across the industry value chain, as well as gain insight into a variety of issues that impact on artists, businesses and organisations. Whereas the Gauteng Creative Industries Mapping Study conflated artists with business and organisational entities, early on in the process of designing the tools it was felt that two different instruments were required for each of these groups. In order to adequately capture the distinct experiences and issues of artists, a modified version of the generic questionnaire for businesses, organisations and freelance workers was developed, though with significant points of commonality and overlap between the two tools, particularly with regard to demographics, employment, market-related issues and finance.

The survey sought to generate data about these entities in each of the following areas:

- Basic demographics: Developing a profile of artists, businesses and organisations in relation to the age, gender, race and location of artists and workers in the industry, as well as the demographics of ownership and management
- Nature of Activity: understanding better the nature and variety of activities that different entities are involved in across the value chain
- Work Circumstances: Understanding better the circumstances in which these activities are undertaken, for both artists and businesses, organisations and freelance workers
- Career Development: Understanding the professional development pathways undertaken by visual artists
- Market-Related Issues: How artists, businesses and organisations experience, perceive and engage with the market for their products and services
- Financial Position and Circumstances: developing a detailed picture of patterns of income and expenditure of artists, businesses and organisations, and the position of artists and workers in relation to a range of finance related issues issues: tax, retirement, insurance and medical cover.
- Obstacles and Needs: Understanding the obstacles, enabling factors and needs experienced by artists, businesses and organisations

Two additional implicit objectives emerged during the course of conducting the survey and analysing the data:

- To establish a benchmark analysis for the industry against which changing patterns in the industry can be tracked through subsequent studies
- To test and benchmark an approach to industry analysis that can serve as a point of reference or departure for subsequent industry research at the level of methodology

Survey Design

The design of the survey was informed by similar surveys conducted in the UK, Scotland and Australia, as well as the survey instrument for the Gauteng Creative Mapping Project study. The report builds both on the approach and the findings generated out of the GCMP study of 2007, though has sought both to 'drill down' in greater detail into the specifics of the visual arts on the one hand, and extend the sample of businesses and organisations to the rest of the country.

The survey was designed to be administered in two ways:

- Respondents filled in an emailed questionnaire (sent together with briefing information about the project), with telephonic follow-up and confirmation of key and/or missing data
- Due to the detailed and sensitive nature the information requested, where necessary the interview was administered in person. Face-to-face interviews were conducted with approximately 10% of the sample.

The survey was initially piloted with 12 individual artists and organisational entities – once the survey instrument was refined, this group was included in the final sample on the basis of updated information.

Briefing documentation and questionnaire formats are attached as Appendix C and D.

Defining the Target Group

Artists

The survey aimed to primarily assess the position of professional artists i.e. people who are pursuing the visual arts as a career and are working, or pursuing work as producers of original artworks within the field. A number of screening questions were put to respondents, aimed at distinguishing between those who pursued the visual arts on a professional basis, and those who pursue the visual arts as a recreational rather than professional activity (i.e. amateur artists).

- Do you earn any portion of your income from making artwork?
- Have you exhibited a work or works of art in any context during the course of the last five years?
- Have you created or been working towards a body of artwork during the course of the past five years?
- Have you been involved in full-time study in the visual arts during the course of the past five years?

Additionally, within the questionnaire, artists were asked to define whether or not they considered themselves to be amateur or professional artists. A small proportion of those who identified themselves as amateur artists were thus included in the survey, though their data is not reflected in the main report. A separate, summary report is included on this

group – while they do not contribute significantly to the outputs of the industry, they do play a significant role as consumers of materials, equipment and supplies, and their activities have a variety of economic spin-offs. They also represent an area of demand for the skills of professional artists, primarily in the realm of teaching.

The screening questions were also aimed at distinguishing between visual artists and people working in the craft sector. The key criteria for drawing this distinction concerned the concept of ‘a body of artwork’ and the primary context for the presentation of work through exhibitions in a gallery context. While people producing functional art or fine craft who exhibited in a gallery context were included in the survey, craftspeople producing functional wares, souvenirs, curios and the like were excluded.

Businesses and Organisations

For the purposes of the survey, the main criterion for inclusion was that the core business of the entity should revolve primarily around the visual arts. A list of types of business and organisation were generated across the visual arts value chain, as shown in the table below.

Table 1: List of types of Visual Arts Industry entity, organised according to Value Chain	
Education, training and development	• education and training provider – public and private • community arts centre (independent) • arts development organisation (non-profit) • artists/arts association
Support services	• materials manufacturer • materials supplier • arts consultant/consultancy (including curators, managers) • art restorer/conservator • technical services provider framer • framing supplier
Distribution/presentation - primary market	• gallery/dealer - commercial/private • artist studio galleries • artist-run gallery/project space • on-line artist portfolio or gallery • art museum/collections
Distribution/presentation - secondary market	• dealer • private collector • auctioneer
Reception	• art publisher • art journalist/critic • arts media specialist/publicist

A number of entities were then excluded from consideration in the general survey. In the case of public art museums and collections and art schools in further and tertiary institutions, these were addressed through separate specialist studies (see sections 5 and 7). These were also excluded in order to avoid a skew or double counting in the estimation of the economic impact of the sector – though they operate with comparatively large budgets, they are largely financed through direct public investment. Other types of entity that were excluded from the survey:

- corporate art collections – addressed in separate study of museums and collections
- funding agencies – economic impact addressed in separate section on funding
- non-specialist private education institutions which offer a wide range of subject areas alongside the visual arts/design
- artist studio galleries – captured in artist survey

Defining the Population

Artists

In defining the artist population, the research team drew together a diversity of sources of primary information. Public and private galleries, arts organisations and artist associations listed in the South African Art Information Directory – an annual publication of the Global Art Information Directory – were approached to provide names and contact details of artists. While galleries were mostly reluctant to disclose this information, a substantial database of over 6000 individual contacts was developed, working primarily with information provided by associations and arts organisations.

The overall population figures produced from this database were then moderated on the basis of the ‘success rate’ achieved through the random sample of artists in each province, i.e. what proportion of artists contacted by interviewers corresponded to the criterion outlined in the preceding section. This process weeded out a significant number of amateur artists, people working in the craft sector and a small number of deceased artists. The results of this moderation produced two sets of figures for the artist population, producing a range of between 4750 and just over 6000 individuals- within which the overall artist population is likely to fall. A midpoint value of approximately 5 500 has been used in extrapolating data related to artists in the balance of the report. This process of refining the data is summarised in the following table and graphic:

Table 2: Artist Population estimates, by Province

	database	% professionals	moderated	midpoint
Gauteng	1993	80	1594.4	1794
Western Cape	2250	70	1575	1913
KwaZulu Natal	605	90	544.5	575
Eastern Cape	347	90	312.3	330
Free State	318	90	286.2	302
Mpumalanga	83	95	78.85	81
Limpopo	80	95	76	78
North West	307	60	184.2	246
Northern Cape	203	50	101.5	152
TOTAL	6186		4752	5469

These figures accord closely with the findings of the only previous local research report that explores this question in any detail, in the context of a creative industries study undertaken in the Western Cape in 2005, drawing on research commissioned from Gabriel Clark-Brown:

“Clark-Brown lists three categories of artists: amateur, part-time and full-time professionals. Using the membership and mailing lists of twenty-two art societies in the Western Cape, he estimates that there are in the region of 1500 amateur, 1000 part-time and 800 full-time professional artists working in the province at the moment.”⁷

Business and Organisations

⁷ Van Graan, M (2005) *Cultural Industries, Arts, Culture And Creative Arts: Towards an understanding of the current nature and scope of the Creative Industries in the Western Cape*. Unpublished report

In defining the population of businesses and organisations operating in the sector, the research team drew primarily on the 2009 edition of the South African Art Information Directory. The South African Art Information Directory (SAAID) has been developed over the course of the past 8 years by the Cape Town based company Global Art Information (GAI), and represents the most comprehensive database of visual arts related entities nationally.

Entities in different regions were then extracted from the GAI database (the electronic version was leased for the period of the project) and organised according to the categories and exclusions outlined above in order to produce moderated figures for these entities. The database research for artists also yielded some new entries and the elimination of other entities no longer in operation. Some additional research was also conducted in Gauteng, aimed at both confirming and extending the contents of the GAI database.

This process produced the following overall numbers of entities by value chain component, broken down by province:

Table 3: Business/Organisation Entity Population estimates, by Province						
	ETD Organisations	Support Services	Primary Market	Secondary Market	Reception	TOTAL
Gauteng	96	65	193	25	11	390
Western Cape	82	76	320	16	8	502
Kwazulu Natal	26	11	69	2	3	111
E Cape	25	14	49	2	0	90
Free State	12	4	29	0	0	45
Mpumalanga	6	2	23	1	0	32
Limpopo	8	0	13	0	0	21
North West	11	2	13	1	0	27
N Cape	2	1	3	0	0	6
TOTAL	267	175	712	47	22	1223
moderated	176	159	597	47	22	1001

Important limitations to note:

- It is likely that the data reflects a slight skew towards the enumeration of entities based in the Western Cape – the region where the company that produces the data is based, and where the most comprehensive and up-to-date data is apparent.
- Many artists will have fallen outside of the sources of information compiled from existing databases. This is particularly true of Mpumalanga and Limpopo, where it was difficult to access existing sources of information and databases.

The Sample

Artists

A first phase of sampling was conducted on a random basis, drawing on the database of over 6000 entries developed for the project. Artists who were not willing to participate were randomly substituted with other entries. A second wave of sampling sought to then address regional and gender skews in the first sampling (for example, a skew towards women artists, who were generally found to be more willing to participate in the survey than men, and in the Western Cape, a skew towards white and amateur artists).

The sampling of artists corresponds roughly to the provincial spread outlined in the preceding section for the overall artist population, with more weight given to the more rural provinces with small artist populations, in order to achieve reasonable sample sizes for these provinces. In the analysis of the data, provinces with smaller artist populations have been grouped in order to be able to produce more meaningful sample sizes across these regions:

- *Developing provinces* (moderate artist populations, presence of some significant arts infrastructure in secondary cities): Eastern Cape and Free State
- *Undeveloped provinces* (small artist populations, minimal arts infrastructure, no major metropolitan clusters): Mpumalanga, North West, Northern Cape, Limpopo.

The following table shows the final sample achieved for professional artists on a provincial basis (note these figures exclude an additional group of 38 amateur artists included in the survey):

	Artist Population (estimate)	Sample Size	Sample as % of Overall Population
Gauteng	1794	66	3.7
Western Cape	1913	58	3.0
KwaZulu Natal	575	47	8.2
Free State	302	18	6.0
EC	330	16	4.9
North West	246	6	2.4
Limpopo	78	9	11.5
Mpumalanga	81	13	16.1
Northern Cape	152	12	7.9
TOTAL	5469	245	4.5

This sample size compares favourably with similar detailed surveys conducted in other countries:

- The major Australian study in this area involved a sample of 239 visual artists from a total population estimate of 9300 (Throsby and Hollister 2003: 119).
- A UK study, conducted by Morris Hargreaves McIntyre for the Arts Council of England in 2004, worked with a sample of 376 against an estimated total population of circa 50 000.
- An on-line and email survey conducted by Bonnar Kennlyside for the Scottish Arts Council in 2002 achieved a sample of 527, against an unknown total population⁸ - though likely to be comparable to the size of the South African artist population.

Businesses and Organisations

A 10% target was established for each of the groupings identified in the preceding exercise. Respondents from each of the aforementioned groupings were randomly drawn from the GAI database. While respondents were provided with substantial briefing on the purpose and nature of the project – and provided with formal assurances regarding confidentiality from the Human Sciences Research Council - significant difficulties were encountered in

⁸ Bonnar Kennlyside. 2002. *Making their mark: an audit of visual artists in Scotland*. Scottish Arts Council: Edinburgh, p. 6

persuading more commercial enterprises such as galleries to participate in the survey. Respondents cited a combination of concerns around the confidentiality of business information on the one hand, and the length of the questionnaire on the other in relation to other demands on their time. While most of the targets across different groupings were achieved, a substantially smaller proportion of business and organisations involved in the primary and secondary markets were sampled, as follows:

Table 5: Sample Sizes Across Visual Arts Industry Value Chain (entities other than artists)

	ETD Organisations	Support Services	Primary Market	Secondary Market	Reception	TOTAL
Moderated population	176	159	597	47	22	1001
Target sample (10%)	18	16	60	5	2	101
Actual respondents	18	15	32	3	3	71
% of population	10,3%	9,4%	5,4%	6,4%	13,6%	7,1%

Due to the sensitivities of respondents around business information, a significant proportion (17%) of the interviews were administered on a face-to-face basis, and a significant group were administered directly by HSRC staff. This produced a skew toward businesses and organisations located in the Gauteng province as follows:

Table 6: Sample Sizes by Province

	N	% of sample	vs overall industry infrastructure
Gauteng	33	46%	32%
Western Cape	17	24%	41%
Kwazulu Natal	6	8%	9%
Mpumalanga	4	6%	7%
Eastern Cape	3	4%	4%
Free State	3	4%	3%
North West	3	4%	2%
Limpopo	1	1%	2%
Northern Cape	1	1%	1%
TOTAL	71	100%	100%

Due to the very small sample sizes involved at a provincial level, data for businesses and organisations has generally only been presented nationally, with provincial data extrapolated from these figures in certain instances.

This sample compares favourably with other surveys:

- The Gauteng Creative Mapping Project study involved the administration of 14 long form and 50 short form interviews – the former being substantially shorter than the format administered in the present study. The GCMP study however included a substantial number of artists within this sample. In the present project, a separate survey of 280 artists was commissioned.

- A UK study on the contemporary visual arts market, conducted by Morris Hargreaves McIntyre for the Arts Council of England in 2004, worked on the basis of a sample of 80 in-depth interviews with galleries and businesses

1.3 Policy Context and Considerations

One of the key outputs contemplated in the Terms of Reference for this study was the development of a set of key policy recommendations aimed at enhancing the contribution of the sector to the delivery of key public policy mandates in the areas of social, cultural and economic development. In developing the recommendations contained in this report, a set of key considerations and principles around the intersection of public policy with the operation of the sector, as well as the current macro-policy context within which the visual arts sector is located, are presented in this section. More detailed consideration of particular policy-driven interventions – past, current and in prospect – are considered in each of the ensuing sections of this report.

Public Policy and the Visual Arts: a Conceptual Framework

The policy recommendations developed in this report have been informed by an overall analysis of the points of intersection between the visual arts and the world of public policy, institutions, legislation and programming. In general terms, five key areas can be articulated in which public policy impacts on the visual arts, both in current reality and in future prospect:

1. Funding of core artistic activities, including creation, exhibition, local and international promotion and the collecting and preservation and protection of artworks; these also include direct supply-side measures aimed at supporting the industry through the funding of institutions, organisations, projects and the activities of individual artists.
2. Funding of secondary activities which involve nurturing the audiences and consumption base for the visual arts, through for example arts education in schools and the outreach programmes of art museums.
3. Through indirect measures that seek to encourage or obligate investment and engagement from others; examples of these include taxation-related measures which treat donations received by non-profit organisations as tax exempt, and donations given as tax deductible; and the percentage on building projects provision for artworks commissions.
4. Through a variety of regulatory measures aimed at influencing or impacting on the way in which the industry itself operates. Such measures may be concerned with protecting artists moral and economic rights over their work (eg regulations relating to copyright and resale rights), providing benefits to artists (pension/social security schemes and so on) and the promotion and/or regulating of transnational trade in and movement of artworks.
5. Through measures aimed at regulating artistic expression.

All except the last of these types of policy intervention are in varying ways predicated on the idea of promoting the visual arts within a given society and economy based on the idea of

the arts as an intrinsically valuable ‘public good’, and on the basis of a set of perceived benefits and impacts that the visual arts are believed (rightly or wrongly) to yield in relation to public policy in other areas, such as education, health and urban regeneration and development.

This report has drawn on a wide range of international precedents in each of the five areas outlined above. In developing recommendations that are appropriate and meaningful in the South African context – and which stand a chance of being implemented - we have been mindful of three key considerations, detailed in what follows.

1. Internationally, the majority of public sector measures that have been developed around the arts in general and the visual arts in particular, have been generated in the context of the advanced economies of North America, Europe and Australasia. These economies enjoy a fiscal base which is greatly in excess of the resources that are available in South Africa. A basic principle that we have sought to adhere to in the making of specific recommendations is that any proposed intervention needs to be affordable, both in relation to the public and private resources that are available, and in relation to the other pressing demands on these resources.

2. Careful consideration has also been given to assessing the prospective costs and potentially negative consequences of implementing particular recommendations, weighed against the likely benefits and impact yielded through such interventions in social, economic and cultural terms. For example, implementing the Artist Resale Right assumes the establishment and sustainability of an administrative capacity to collect and distribute royalties to artists, which would need to be justified by a sufficient value and volume of transactions in the secondary market (costs). It is also a measure that is likely to be resisted by both local auction houses and international auction houses that have a presence in South Africa, as it directly impacts on the cost of doing business, and may result in business moving to other national contexts where these measures do not apply (a consequence). However, international experience suggests that such measures can yield significant revenue for artists who have derived comparatively meagre returns on the primary (first) sale of their work (a benefit).

3. A further consideration in the development of the recommendations in this report has been borne out of the recognition that many of the problems of the visual arts in South Africa are in fact problems of the arts in general – the funding system and arts education being two signal examples. This report has been mindful of the fact that these more generalised problems need to be addressed through measures that would have a wider impact on the arts sector in general. This study has confined itself to noting these wider issues on the one hand, and suggesting sector-specific responses and remedies on the other, where these do not seem to exceed the mandate of the present assignment.

In what follows, the overarching Constitutional framework within which the arts sit and in within which any policy recommendations would need to be effected is outlined, followed by summary consideration of the existing national policy framework for the visual arts.

The Constitution and Intergovernmental Relations

Under the Constitution – which represents the highest policy and regulatory framework for the country as a whole - the competence for culture is assigned as a concurrent (i.e. simultaneous) competence of the national and provincial spheres of government, with both

able to exercise policy and legislative functions in this area. The Technical Intergovernmental Committee (TIC) structure is composed of senior officials from the national and provincial departments of arts and culture and is tasked with harmonizing the development of policy and the implementation thereof at national and provincial level. No specific responsibility for the arts and culture is assigned to local government within the framework of the Constitution, though the legislative framework for intergovernmental relations encourages responsibilities to be devolved from national or provincial to local level where government is in most direct engagement with citizenry. Such downward assignment of powers is based on the assumption that local government has or is provided with the capacity and resources to take on this responsibility.

One of the consequences of this is that while we now have national and provincial departments concerned with arts and culture, outside of the major metropolitan municipalities, government generally has neither the mandate nor the capacity nor the financial resources to address the development of the arts and culture at a local level. This has had major implications for the implementation of certain areas of national cultural policy which assume a role for local government, such as in the area of community arts infrastructure and programming. The positive achievements of provincial and local government as well as some of the more negative implications of this framework are discussed in practical detail in the ensuing sections of this report.

The White Paper

The governing policy underpinning the development of legislation, institutions and programmes during the course of the past fifteen years has been the national Department of Arts and Culture's White Paper on Arts, Culture and Heritage, which emerged from an extended process of consultation with the arts and culture sector and was adopted in 1996.

The White Paper sought to establish a framework within which the historical legacy of the impact of colonialism and apartheid on the arts industry would be addressed, and in which the arts and culture would be integrated into the overall social and economic development goals and planning frameworks of government. The central concerns of the White Paper revolve around the promotion of the arts on the basis of both their intrinsic value as well as on the basis of their contribution to nation-building, social cohesion and economic development.

Within the White Paper, the visual arts are grouped with craft and design, though are also broken down into a (non-exhaustive) list of media and techniques ("include painting, sculpture, graphic art, photography, drawing, mural painting, paperworks, performance art, tapestry, fibre art, video, installation works, computer graphics, etc."⁹).

The White Paper makes reference to three specific intentions to be addressed in relation to visual arts, craft and design:

- To facilitate co-operation between government, para-statal and non-governmental organisations at national, provincial and local levels
- To influence the education and acquisitions policies of public institutions concerned with the visual arts so as to reflect a wider concept of visual culture, embracing craft and design heritage
- To investigate the feasibility of establishing an Art Bank or similar mechanism

⁹ DACST (2006) White Paper for Arts, Culture and Heritage. Clause 25.

Five additional overarching strategic thrusts can be gleaned from the White Paper, all of which have implications for the visual arts:

- the provision of **infrastructure**: making the arts more accessible to the majority of the population through the development of community arts centres located in rural and peri-urban/township nodes, with programmes connecting the arts to wider social and economic development objectives
- **human resource development**: planning for the training of arts practitioners, arts educators and trainers and the training of people in areas of identified critical and scarce skills, specifically in the areas of arts management and administration.
- greater access to **public funds** to support the creation and dissemination of art: the White Paper contemplated the establishment of a National Arts Council, the use of tax benefits to encourage private sector sponsorship, the establishment of a Lottery Fund for the arts (through engagement with the department of trade and industry), the development of a National Association for Business Sponsorship of the Arts securing complementary investment from international partners
- the **development of markets and audiences**: through integrating the arts into the school curriculum, the activities of community arts centres, maximizing the use of existing infrastructure concerned with the presentation of the arts, and through festivals programming
- and securing **the rights and status of artists**: through the review of copyright legislation, and legislation relating to labour relations, taxation and social security.

It should also be noted that the White Paper went through a process of wideranging review during the course of 2007/8 culminating in a National Summit on Arts and Culture. The document that emerged out of this review process highlighted a set of wide-ranging issues relating to challenges in policy, legislation and the state of implementation. The recommendations emerging from this process of review are presently under consideration by the Department.

The White Paper also contains explicit recognition that the realisation of the goals outlined above would be contingent on engagement both with other departments at a national level, the department's counterparts at a provincial and local level, and the private sector. Key other departments at a national level include:

- The Department of Finance (DoF) which is responsible for revenue collection and legislation governing taxation (including tax breaks and incentives), as well as for the allocation of public money across departments and spheres of government
- The Department of Trade and Industry (dti) is responsible for copyright legislation that governs the cultural and creative industries and for promoting the conditions, through for example incentives, rebates and export schemes, that facilitate the growth of these industries.
- The Department of Labour (DoL) is responsible for legislation that governs labour relations.
- The Department of Higher Education is responsible for legislation regarding human resource development in the cultural industries, including the tertiary education system (under which art schools operate), the FET college system (vocational training in the arts) and the Sector Education and Training Authorities (work-based training in the arts) – the latter competence until recently was located with the Department of Labour.
- The Department of Basic Education (DoE) is responsible for the provision of in-school visual arts education.

- The Department of Home Affairs is responsible for the issuing of work permits in the cultural industries.
- A number of other departments play a more minor role in policy that impacts on the sector, including the Departments of Tourism and International Relations and Cooperation

While there is currently very little policy or legislation exclusively or specifically concerned with the visual arts, the sector is affected in variously direct and indirect ways at a national, provincial and local government level through a variety of institutions, policies and programmes that address the arts, culture and heritage more generally. A map of how these different government departments, institutions and agencies interact around the visual arts at a national, provincial and local level is provided on the following page.

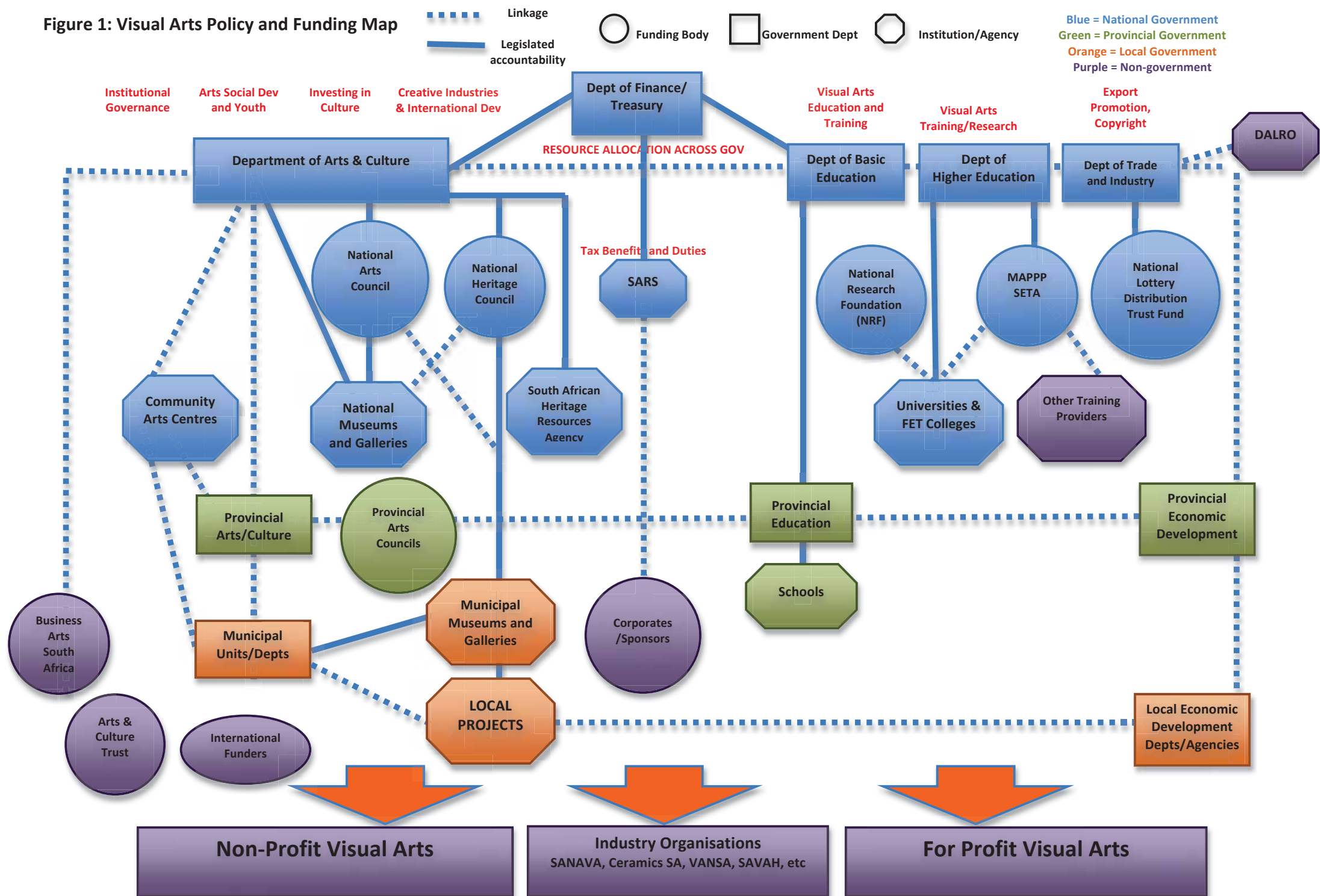
In each of the ensuing sections, the current status of the policy objectives outlined in the White Paper are assessed in relation to the various components of the visual arts system which they have a bearing on (artists, infrastructure, the market, etc). Consideration is given to current legislation, the department or departments responsible for implementation, the status of implementation of a particular policy area and issues and recommendations associated with policy, legislation, institutions and programmatic intervention in a given area.

International Agreements

There are also a variety of international agreements and declarations that the South African government is a signatory or party to which have relevance for the visual arts, and particularly for the position of individual artists. These include:

- The United Nations Recommendation on the Rights and Status of the Artist (1980) – a wide-ranging recommendation which encourages member states to progressively introduce measures aimed at protecting and enhancing the social and economic position of artists in society. This recommendation is discussed in more detail in Section 5 (The Position of Artists).
- the Berne Convention for the Protection of Literary and Artistic Works (1886, with various subsequent revisions, with South Africa becoming a co-signatory in 1928): a treaty managed by the World Intellectual Property Rights Organisation (WIPO) which makes provision for reciprocal arrangements between states relating to the protection of copyright and moral rights in artistic work, and which also makes provision for copyright collection and artist resale rights. These provisions are discussed in greater detail in Section 5 (The Position of Artists).
- the Convention for the Protection and Promotion of the Diversity of Cultural Expressions (2005, with South Africa becoming a party to the Convention in 2006): commits government to promoting local cultural industries, protecting local cultural industries from disadvantageous trade agreements, consulting with industry and civil society. This Convention is discussed in more detail in section 3 (The Nature of Demand for the Visual Arts).
- the Nairobi Plan of Action (originally developed in 2005 and then refined and readopted in 2008 at a meeting of African Ministers of Culture in Algiers).

Figure 1: Visual Arts Policy and Funding Map



Section 2

An Overview of the Visual Arts Industry in South Africa

This section provides a high level summary of the visual arts industry in South Africa, attending to the broad historical context for the industry and clarifying the scope of what is understood by the visual arts in the context of this report. Consideration is given to the general operation, structure and geographical distribution of the industry. Key characteristics of businesses and organisations operating in the sector and a profile of the labour market are presented, based on data gathered through the survey. The overall economic impact of the sector is summarised, together with consideration of social and cultural contribution of the sector. The section concludes with a consideration of the overall framework for governmental engagement with the sector to date.

2.1 The Global-Historical Context for the Visual Arts

While this report is largely concerned with functioning and organisational structure of the visual arts industry in South Africa today, in better understanding the nature of the industry it is worth giving some summary consideration to the historical roots of this system.

South and Southern Africa is home to one of the oldest traditions of image-making in the world – the rock art paintings and engravings of the various (and variously described) Khoisan peoples. Rich pre-colonial traditions of image and object played a powerful role in the social and cultural fabric of the pastoralist societies that moved into the subcontinent during the course of the last two millennia. While these visual traditions continue to inform and provide a (sometimes contested) resource for the work of visual artists today, the key features of the visual arts industry in South Africa have been shaped by institutions, markets and a framework for the definition and criticism of the visual arts that has its foundations in 18th and 19th century Europe, and which have played themselves out in complex ways in the South African context. The re-imagining and active reshaping of these institutions, markets and language in the context of what is now a fully ‘globalised’ industry, may be regarded as a signal – and both challenging and stimulating – feature of the visual arts in Africa and South Africa.

In their analysis of the fine arts system in North America, McCarthy, Ondaatje, Brooks and Szanto¹ note the importance of three interwoven historical developments in the shaping of the contemporary understanding of the visual arts – the rise of the public art museum, the development of the market for the visual arts and the emergence of art criticism as a distinctive discourse governing the definition, appreciation and valuation of the visual arts.

Prior to the evolution of the public art museum in the eighteenth and nineteenth centuries, art appreciation was closely linked to arts patronage through the churches and aristocracies of Europe – the ownership and appreciation of art being confined to a wealthy few in largely private contexts, with the exception of religious art. The idea that underpins the art museum – the notion that the appreciation of the visual arts, and the benefits that attach to this appreciation, should be made available for the general public outside of a religious context – only developed during the course of the nineteenth century.

While this made art available to a wider public it also broadly coincided with the development of the Enlightenment concept of ‘the aesthetic’. This approach to the appreciation of art placed increased emphasis on both the universality and the purity of the aesthetic experience – the appreciation of form outside of any reference to content as an

¹ McCarthy, K. Ondaatje, E. Brooks, A & Szanto, A. 2005. *A Portrait of the Visual Arts: Meeting the Challenges of a New Era*. Rand Corporation: California. pp. 9-13

essential and profound human capacity - and was the philosophical driver underpinning the move towards abstraction in modernist art.

These critical ideas powerfully shaped the development of the idea of the art museum in the twentieth century – and in turn, the ‘white cube’ concept of the contemporary art gallery - as an environment of pure contemplation, unencumbered by any investment in specific content, discernable subject matter or reference to the wider world. The late nineteenth and early twentieth century also saw the simultaneous maturation of the basic system for the arts market that we know today. Progressing from the seventeenth century system of guilds and academies, the nineteenth century saw the market for the visual arts increasingly centred around the activities of artists, dealers and critics – and the positioning of the latter two groups as arbiters of taste and economic value over the canon of both historical and contemporary art.

The 1960s, 70s and 80s saw a proliferation of new artistic movements in North America and Europe that in various ways sought to challenge this elitist concept of art – and also recuperate the idea that art might have a content and address contemporary social and political issues. The period of the 80s and 90s also saw three other intertwined developments. The first key development was a boom in the market for both historical and contemporary art. The second key development has been the increased priority accorded by art museums to the aggressive cultivation of audiences for contemporary art through increasingly sophisticated marketing and audience development programmes - the emergence of the phenomenon of the blockbuster exhibition being the emblematic phenomenon in this regard. The period has also seen massive investment in museum infrastructure in the advanced economies of North America, Europe and Australasia. The third key development has been the rise of the curator as a powerful figure in the determination of both value and meaning in contemporary art.

Globally, the art museum continues to function as a primary venue for the public appreciation of the visual arts – biennales and art-fairs representing additional event-based platforms specifically designed to showcase cutting edge contemporary art within either a critically driven (biennale) or commercially driven (art fair) framework. In Anglo American and European contexts, having one’s work acquired by or exhibited in a public art museum context continues to represent a critical aspiration for the majority of contemporary artists, a moment of ultimate validation.

The South African Experience

While many of the above trends broadly apply in the South African context, the visual arts system in South Africa largely evolved around the interests and aspirations of a minority of the population. As is the case in most other parts of the society and economy, the institutions, discourse, commercial activity and attendant networks of the visual arts sector have historically been dominated and shaped by the white population, with black artists and organisations being consigned to a largely marginal role in the development of the sector. During the apartheid period, black artists were accorded a secondary status in relation to mainstream practice, and – in the case of those artists that pursued an overtly politicised practice – actively suppressed and persecuted. The mainstream of creative practice was shaped by an aspirational culture which sought to follow trends in Europe and North America, usually with a significant time lag. The visual arts nevertheless also served as an important domain for critical and dissident voices among both black and white artists, and

while much of this work received some exposure internationally, the economic dimensions of the visual arts remained largely undeveloped domestically.

Until the mid 1980s the arts sector was largely divided along political lines. Government-funded institutions and organisations avoided production and exhibitions of overtly politically critical artworks that would antagonise these institutions' relationship with the apartheid government. Engagement with the state was largely about broadening collections in museums, accessing more funding for the arts and aesthetic debates around state acquisition of art works or monuments. State funded museums still focused on the works of white artists, often within the modernist idiom. Artists and organisations which aligned themselves with the democratic struggle defined the artist as a cultural worker, and art as 'a cultural weapon'. The African National Congress and the United Democratic Front successfully lobbied for an international boycott of South African art not supportive of the struggle, and for funding of struggle artists and organisations. One of the major hurdles for ambitious young black artists was the inaccessibility of university training. As a result several arts centres, like Polly Street, Community Art Workshop, Johannesburg Art Foundation, Katlehong Art Centre and the Community Arts Project, opened new avenues for the training of upcoming African artists, or a location for revolutionary production. Several organisations and projects evolved around the empowerment of black artists, e.g. the Thupelo International Artists' Workshops and the Federated Union of Black Artists.

During the latter part of the 1980s a number of exhibition projects and publications were developed which sought to produce a richer picture of creative production in the country. Many black artists, including several rurally based artists such as Jackson Hlungwane and Noria Mabasa, were included in the 1985 *Tributaries* exhibition at the Johannesburg Art Gallery, curated by Ricky Burnett; the 1989 exhibition and publication *The Neglected Tradition*, curated by Steven Sack, represented the first significant attempt to document the history of black artists production and reflected a dynamic arts world which sought to transcend boundaries of race and politics. Albie Sachs's influential paper 'Preparing ourselves for freedom' (1989), sought to redraw the role of creative production in South African society in anticipation of political change. Although many cultural workers objected to Sachs's seeming dissolution of the link between art and politics, the views in this paper sought to establish a new and independent ground for creative work in a post-apartheid context. The international boycott was lifted and many artists in exile returned to South Africa, or cooperated in exhibitions that included their works.

Institutionally, the establishment of a Department of Arts, Culture, Science and Technology in 1994 — since 2002 separated out as the Department of Arts and Culture — provided the state apparatus and administration to develop inclusive policies and programmes for redress in the arts. The subsequent establishment of the National Arts Council and the National Lottery Distribution Trust Fund as the two major state funding channels, provided 'arm's length' opportunities for art production, training and exchange.

In the post-apartheid period, South African contemporary artists have increasingly participated in an international and continental arena for presentation and debate, fuelled by a global interest in the complex history and contemporary realities of the country. The contemporary art scene in the country has positioned itself increasingly as a leader rather than a follower in the international contemporary discourse on the visual arts, supported by the proliferation of a number of print and on-line art critical platforms that explore the philosophical and political complexities of contemporary art practice in a postcolonial and post apartheid context. A significant number of major exhibitions and catalogues have been

concerned with challenging and breaking down preconceptions about South African people and art, exploring the ambiguities, diversity and dynamics of this context, both in their form and content. In addition, many South African art works have started to be acquired by collections abroad (Yorke, 2004), and the domestic auction market has grown dramatically during particularly the last five years, with record prices being fetched for particularly early modernist South African art.

Within South Africa, exhibitions and conferences have also offered opportunities for reassessing a decade of renewal and assertion within the African context. For example, the Sessions eKapa project of the Cape Africa Platform brought gallerists, artists, academics and writers together around a range of issues in contemporary African art practice (Gurney, 2005). However, the latter event also demonstrated the persistence of the legacy of apartheid, and included heated debate on the slowness of transformation in the art world and the wider society (Gurney 2005). The post-apartheid period has also seen a new generation of largely university-trained young black artists and curators entering the domestic and international circuit of commerce and discourse.

2.2 Industry Definition and Scope

For the purposes of this report, the visual arts sector is taken to encompass the activities of individual artists, collectives, businesses, organisations, institutions and freelance professionals who are involved in the production, circulation, retail and consumption of visual artworks. In order to avoid some of the philosophical problems that attach to discussion of what in fact constitutes the core object around which all of this activity revolves – the visual artwork - this report has taken a stance that is both functionalist and accommodating on this question. We have considered visual artworks to be any work that is presented as such within the discursive, institutional or commercial frameworks of the visual arts. In other words, those objects or experiences that are presented in the context of art criticism, the arts market (through galleries and similar contexts) and/or public and private art collections and museums.

In this context, it is important to note that the report encompasses two broad and quite different streams within the output of the sector – ‘the contemporary’ and ‘the commercial’. The so-called ‘commercial’ fine arts includes wild-life, landscape, watercolour, still-life and portraiture, which involve traditional media and techniques being applied to variously traditional approaches to the representation of subject matter. Such work usually has a largely decorative function and the activities at this end of the visual arts market intersect in significant ways with interior design and craft. This work derives its primary validation from the marketplace, and generally does not participate in (or acquire validation through) art-critical discourse and the institutional frameworks for the visual arts.

The ‘contemporary’ visual arts encompasses work which engages in some degree with the contemporary critical discourse on the visual arts, and which involves a wide variety of media and techniques being applied to issues and questions arising both from the history of artistic practice as well as the wider social, cultural and political realm. Signature methods include installation, performance art and digital arts, but may also include a variety of ‘traditional’ methods such as painting and sculpture. By contrast to the ‘commercial’ visual arts, the contemporary visual arts is heavily invested in the discursive and institutional frameworks of the visual arts (represented by art journals and public and private museums and collections). The market for contemporary art is characterised by much greater

extremes (in price) than is the case with the market for so-called 'commercial' art – the reasons for this are discussed in more detail in the next section.

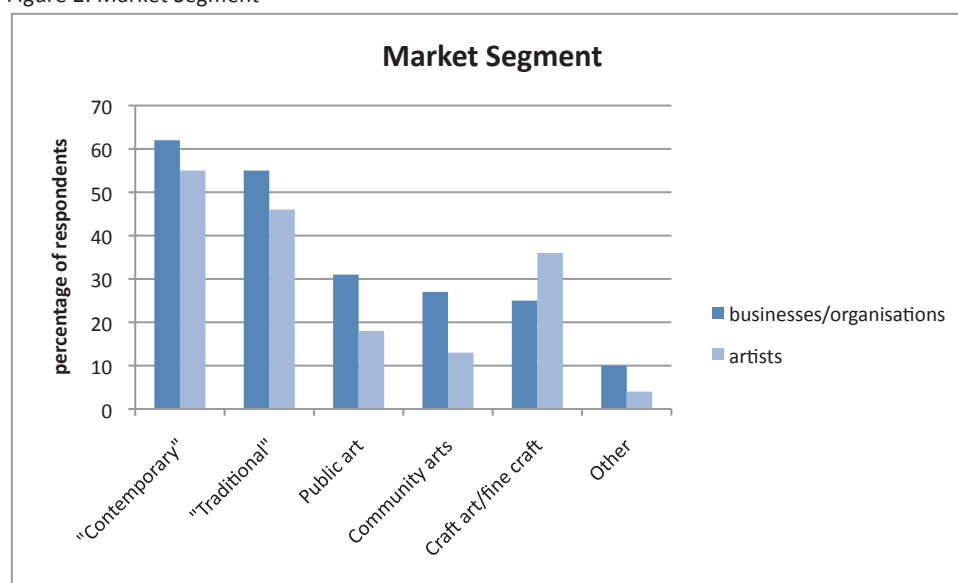
At their extremes, each of these streams is characterised by very different audiences, consumers, distribution networks and frameworks for training, critical reception and professional validation. In reality – and particularly in the South African context - the distinction between these two streams is however often blurred, and many artists and galleries operate simultaneously at different points along a continuum between the two.

Three additional secondary areas of industry activity are addressed by the report which participate in different ways in both of these broadly defined streams:

- public art (the commissioning and production of temporary or permanent artwork for public spaces),
- community arts (the deployment of the visual arts in education, health and other developmental contexts),
- fine-craft and contemporary craft and design (the production of unique, once-off handcrafted items which may be presented in a gallery context).

Artists, businesses and organisations who participated in the survey were asked to identify the segments in which they situated themselves²:

Figure 2: Market Segment



The majority of individual artists, businesses and organisations identified their involvement in more than one area, suggestive of the fluid nature of these distinctions as they play themselves out in the reality of creative practice and enterprise.

An area which is not given any detailed consideration in this report is what is known as Outsider art – art produced by individuals that have generally not undergone any formal training, and would not normally participate in either the visual arts market or the contemporary discourse around the visual arts. This work can however be co-opted into the

² "Contemporary" was elaborated as follows in the questionnaire: "contemporary, conceptual work, including new media, installation, video and performance based work". "Traditional" work was elaborated in the following way: "traditional artworks employing traditional materials and subject matter"

market and the contemporary discourse of the visual arts, and this is particularly true in the South African context, where examples abound of artists who have created work outside of the formal frameworks of the visual arts, and whose work is then drawn into this world through the intervention (usually) of curators, dealers and gallerists who 'discover' this work and reframe and recontextualise this work within the context of public and private galleries.

2.3 How the Industry Operates

Artists produce creative work which is the primary revenue-generating asset of the sector. The concept of the 'original artwork' generates a number of unique features for the sector. Unlike other parts of the creative industries, where added value is created through the production of multiples or copies, added value in the visual arts is created through the accumulation of value around unique, once-off products. One of the consequences of this is the existence of both a primary and a very significant secondary (resale) market for visual artworks – the latter generating substantial revenue and influencing prices in the primary market.

Artworks are usually sold in the first instance in the context of gallery exhibitions (the primary market), but may also be sold directly from the artists studio or through an on-line platform. Artworks may then be resold in the secondary market (dealers and auction houses), after circulation in the primary market. Work may also be commissioned by individuals, corporations or public agencies for private homes, corporate collections or public spaces and buildings – this usually involves an agent/agency of some sort playing a mediating/managing role between artists/producers and clients/buyers.

Visual artworks are characterised by their uniqueness, and the investment of quantities of symbolic capital in individual works, and the close identification between artworks and the reputation and profile of particular producers – and in turn the reputation and profile of those involved in presenting and selling work (gallerists and dealers). From a statistical point of view, it is an unusual sector in that input costs (materials, equipment) can often bear little obvious relation to the price of outputs/artworks. In industries with a more conventional value chain (e.g. the music industry) it is easier to disaggregate the inputs and outputs at different stages of the value chain (content development, live performance, recording, distribution and retail). The visual arts industry is characterised by extreme fluidity in roles assigned to different players in the value chain. Artists may sell directly to buyers and dealers from their studios; gallerists frequently operate in both the primary and secondary markets for the visual arts; businesses that derive their primary income as suppliers/support services may also acquire and sell original works of art, and so on.

Occupations in the sector are generally knowledge-intensive and the majority require comparatively high levels of both formal education and on-the-job experience before significant professional validation and concomitant economic reward is achieved, whether as an artist, administrator, curator, gallerist or dealer. The visual arts market is relatively porous to new entrants, partly a function of the ephemeral nature of the product on offer, with the (seeming) promise of high returns based on minimal investment. However, while easy to enter the industry, the industry is sustained by fragile and volatile levels of demand for new entrants, and it is difficult to sustain entrepreneurial activity in the absence of patiently nurtured networks of artists, suppliers of services and - most importantly - buyers.

Broadly speaking, exhibitions of artists work can come about in two ways. On the one hand, artists may work individually or collectively to produce creative work that is then exhibited

in public or commercial galleries, or independent art spaces. On the other hand, the concept for an exhibition project may be generated by a curator, who will then work with one or more artists whose work is relevant to the exhibition concept in realising an exhibition project in a commercial gallery, independent project space or a public or private museum context/gallery context.

For commercial galleries, revenue is primarily generated through the sale of artwork, and to a much lesser degree in the South African context, the sale of publications and other exhibition related merchandise. Designers, writers and editors are involved in the development of publications that may accompany exhibitions. Independent artist-run galleries will usually be self-financed or rely on grants to address their running costs – they are seldom viable as business entities, but provide an important space for creative innovation and development outside of the commercially driven parameters of commercial galleries – which in turn informs buying patterns in the commercial market. In a similar way, public art museums and galleries represent publicly subsidised spaces in which in-house or independent curators can develop exhibition projects that are not driven by primarily commercial dictates – artwork is not normally sold in these contexts.

2.4 The Structure of the Industry

Artists

The visual arts industry is marked by the fact that the most common organisational entity consists of a single producer/maker – the artist. In this sense the visual arts is similar to, for example, literature, but different to dance, craft, theatre and music, where the nature of production places intrinsic demands on much greater degrees of collective organisation and co-operation.

The database developed for the survey suggests that there are in the region of 5500 artists in South Africa. The survey aimed to primarily assess the position of professional artists i.e. people who are pursuing the visual arts as a career and are working, or pursuing work as producers of original artworks within the field. A number of screening questions were put to respondents, aimed at distinguishing between those who pursued the visual arts on a professional basis, and those who pursue the visual arts as a recreational rather than professional activity (i.e. amateur artists).

The following selection of international comparators places these figures in some perspective:

Table 7: South Africa Visual Artist Population vs International Comparators

	Population	Est. no of visual artists	Artist:Population ratio
South Africa	48 million	5500	1:8727
Australia ³	22 million	9000	1:2444
UK ⁴	62 million	28 500 - 52 000	between 1:2175 & 1:1192

³ Throsby, T & Hollister, V. 2003. *Don't Give Up Your Day Job: an Economic Study of Professional Artists in Australia*. The Australia Council: Sydney.

⁴ The Visual Arts Blueprint report produced by Creative and Cultural Skills (2009) reports a figure of 28 500 at one end of the spectrum. Morris, Hargreaves and McIntyre. 2004. *Taste Buds - How to cultivate the art market*. Arts Council England publication, accessed at <http://www.takingpartinthearts.com/content.php?content=1034>; estimates for visual artists in the UK range between 34 000 and 120 000; the Artist Network figures have been used in the above analysis.

US ⁵	309 million	250 000	1:1236

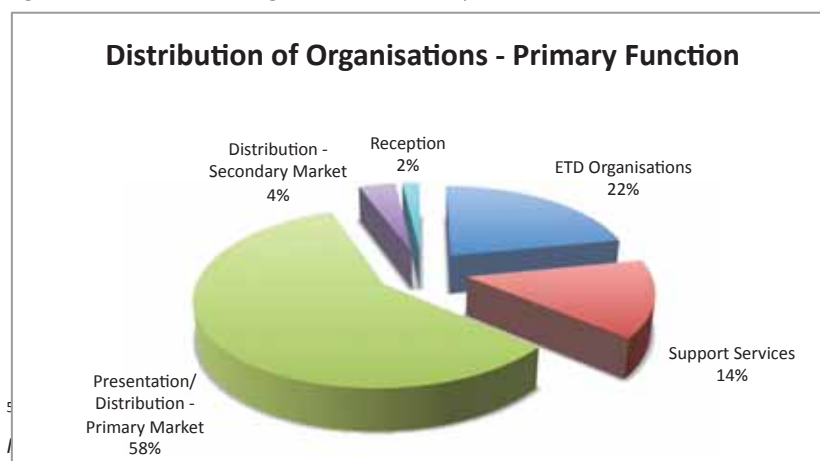
Unsurprisingly, advanced economies with large proportions of upper middle and high income groups within the total population are more able to support the consumption of ‘income-elastic’ products such as the visual arts, and hence have a larger artist population in relation to the general population.

Firms

Just over 1200 organisational entities are engaged in a variety of ways around training, production, presentation, retail and mediation of the core activities of visual artists. Of these 1200 entities:

- the majority (58%) are primarily concerned with the presentation of visual arts to audiences and consumers – commercial and artist run galleries/project spaces, public and private museums and collections and project spaces. The survey data shows that the selling of artwork and presentation of exhibitions/projects were (respectively) noted as an area of activity for 70% and 59% of all entities across the value chain– an indication of the fluid and multiple roles that different actors within the sector play.
- The second largest group (22%) is composed of education, training and development organisations – art schools in tertiary institutions, private art schools, artist associations and non-profit arts development organisations. A striking 54% of all entities indicated that they provided education and training services in the course of their work.
- Organisations concerned with providing specialist materials, equipment and technical services (eg framing, installation) to visual artists and businesses constitute 14% of the total group, though it should be noted that some of these entities do not provide exclusively to the visual arts sector. 46% of all entities indicated the provision of support services as an area of activity.
- Small numbers of entities (4%) are primarily involved in the resale of work in the secondary market (auction houses, consultancies and collectors) – though it should also be noted that the resale of work is also an activity of many galleries/gallerists.
- The smallest group (2%) of entities is comprised of specialist providers concerned with the mediation and promotion of the visual arts to a general public through publications and print, on-line and broadcast media – specialist art publishers, publicists, freelance writers and critics. 15% of all organisations indicated publishing and media as forming part of their work activity.

Figure 3: Distribution of Organisations - Primary Function



Meeting the Challenges of a

The largest number of entities are concerned with the presentation and sale of visual art in the primary market – primarily commercial galleries. A small proportion of entities involved in the primary market are in fact more concerned with presentation/exposure than they are with sales – public and private art museums and collections, independent project spaces and the like.

Commercial vs Non-Profit

Another way of looking at the distribution of organisations is on the basis of the distinction between the commercial and non-profit dimensions of the sector. While the majority of organisations are involved in the commercial dimensions of the sector, about 30% of the non-profit organisations and public institutions that operate in the sector consist of large publicly funded institutions that play a significant role in the visual arts system – public art museums, art schools in tertiary institutions and funding agencies.

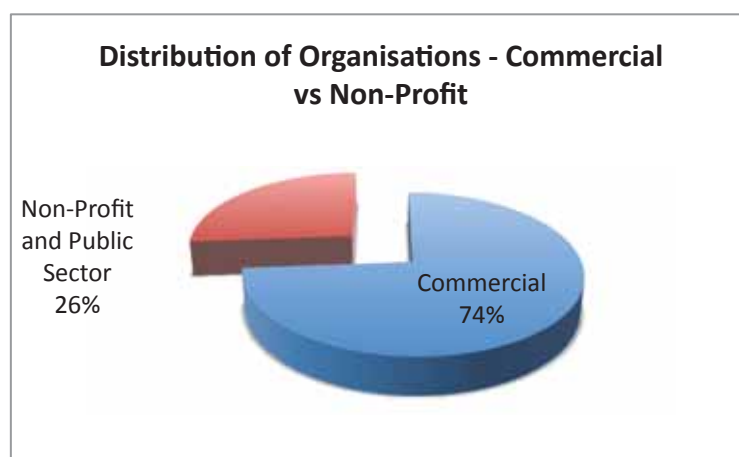


Figure 4: Distribution of Organisations - Commercial vs Non-Profit

Some international reference is also useful here. A 2009 report⁶ produced by Creative and Cultural Skills suggests that there are 4580 businesses active in the visual arts in the UK across the value chain, in a country with a similar population size to that of South Africa. A 2005 research report⁷ on the presentation of the contemporary visual arts in England, suggests that there are roughly 1200 business entities concerned *only* with the presentation of **contemporary** visual art in England alone, a third of these also presenting contemporary craft and design. A staggering one third (34%) of these entities are publicly funded institutions regularly supported by regional or national government, and a further third is comprised of commercial galleries. In the South African context, just over 640 entities were identified which are concerned with the presentation of visual arts. The survey found that

⁶ Creative and Cultural Skills. 2009. The Visual Arts Blue Print: a Workforce Development Plan for the Visual Arts in the UK. London, England.

⁷ Burns Owen Partnership/Experian Business Strategies. 2005. Review of the Presentation of Contemporary Visual Art. London: Arts Council England.

only 4% of these entities are publicly funded museums, galleries or collections – more than 90% of these entities are galleries.

2.5 The Distribution of the Industry

The bulk of the business and organisational infrastructure of the visual arts is located in Johannesburg and Cape Town – based on a crude headcount, 41% of all the industry infrastructure in the country is evenly split between these two cities. The proportion of the economic value of the industry generated in these two centres (as opposed to just the number of entities) is however substantially higher, as these centres are home to the major commercial galleries and auction houses.

The province of Gauteng has the most dense physical concentration of the industry in the country based on the number of individual entities, with 32% of industry infrastructure occupying just over 1% of the total land area of the country. Within Gauteng, the City of Johannesburg accounts for 64% of all visual arts entities. By contrast, the Western Cape (11% of land area) accounts for 41% of industry infrastructure, with approximately 50% of this located in the greater Cape Town area – though the Western Cape has the largest proportion of infrastructure in both absolute terms and relative to the general population of that province.

Kwazulu-Natal, the Eastern Cape and the Free State represent significant secondary industry clusters concentrated around Durban, secondary cities in each province and small rural artist communities. Very low levels of infrastructure are to be found in Mpumalanga, Limpopo, the North West and the Northern Cape. The distribution of artists follows a similar pattern to that of business and organisational entities, with roughly equal proportions of artists found in Gauteng and the Western Cape (see the Methodology section for qualifications on these figures, and section 5 for more detail on the distribution of artists).

Figure 5: Distribution of Businesses and Organisations

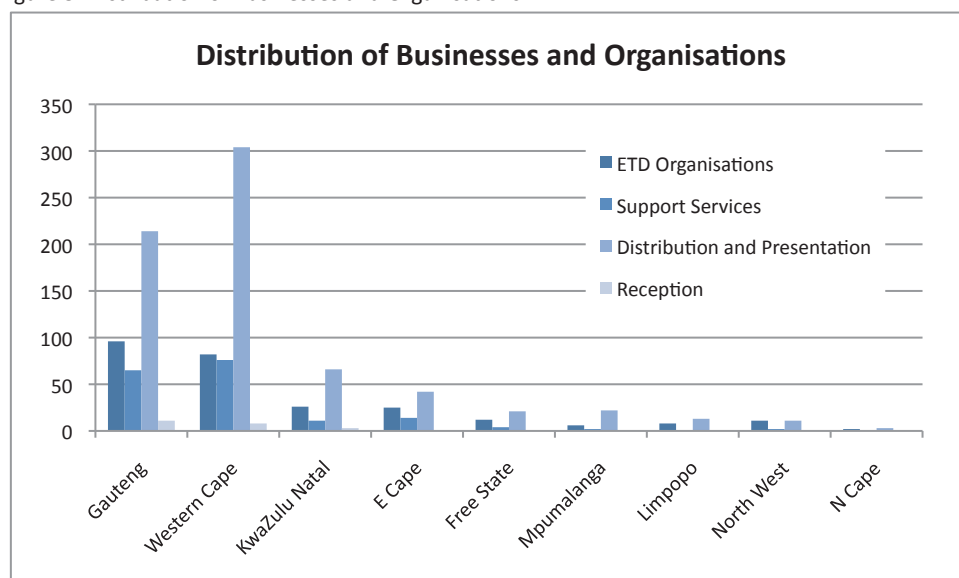
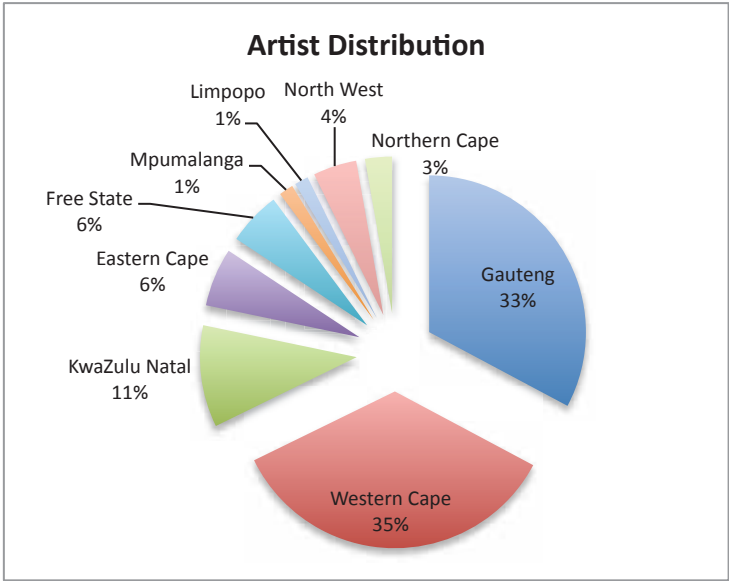
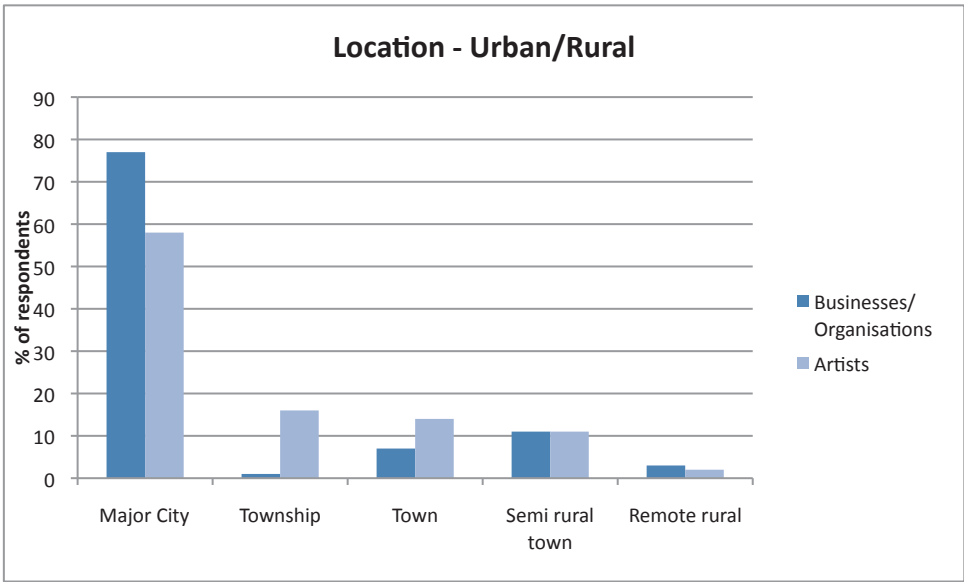


Figure 6: Artist Distribution



Of the surveyed business and organisational entities, the great majority identified themselves as being located in the central business districts and suburbs of major urban centres, with almost none located in township or deep rural/remote contexts – though significant numbers of artists live and work in township contexts. Respondents located in urban centres were most likely to regard this as positively impacting on their market access, with 81% of urban respondents indicating that this was the case.

Figure 7: Location - Urban/Rural



Concentric circles density and readability

- Legend for concentric circles density:
 - Red: Highest density
 - Orange: High density
 - Yellow: Medium density
 - Green: Low density
 - Light Green: Very low density
 - White: No data
- Legend for readability:
 - Black dot: Capital/Province
 - Blue line: Major roads
 - Red line: Minor roads
 - Green line: Water bodies
 - Blue line: International borders
 - Red line: Provincial borders
 - Blue line: District boundaries
 - Red line: Local government boundaries
 - Blue line: Other boundaries

Province	City	Percentage
Western Cape	Cape Town	41%
Gauteng	City of Johannesburg	32%
North West		2%
Free State		4%
Eastern Cape		7%
KZN		9%
Limpopo		3%
Mpumalanga		3%
Northern Cape		0.5%

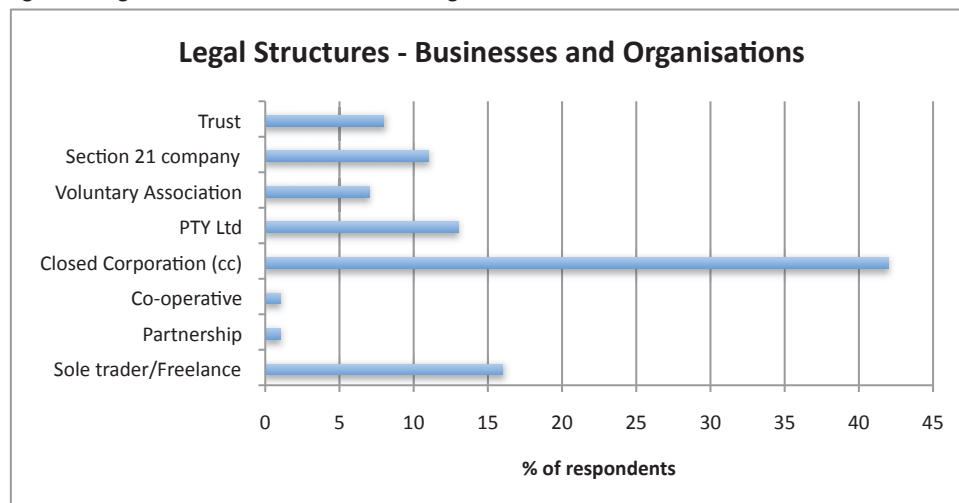
2.6 Key Characteristics of Visual Arts Businesses and Organisations

A quantity of data on key characteristics/attributes of business and organisations working in different parts of the value chain across the sector was obtained through the survey of entities working across the sector. These are summarised in what follows. Where relevant, information from the artist survey has been included here, though more detail on this component of the industry is furnished in section 5 of this report, The Position of Artists.

Legal Structures and Longevity

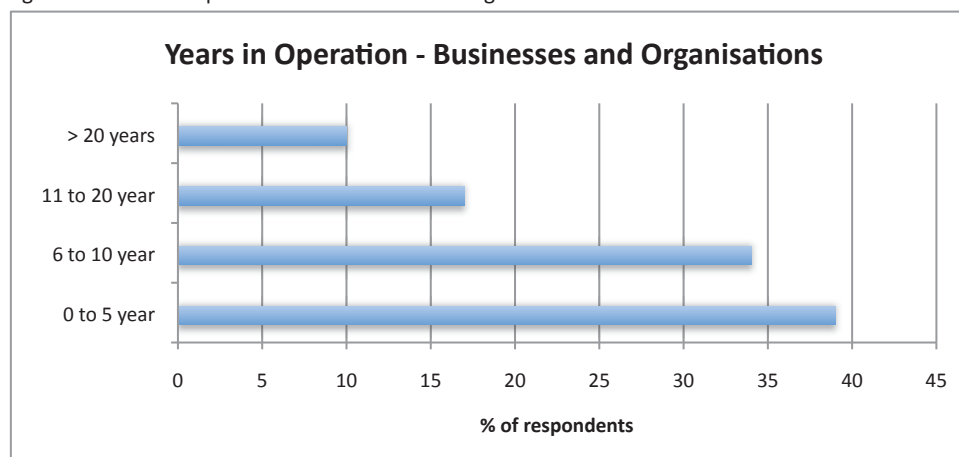
The closed corporation (the simplest commercial entity with a distinct legal identity in South African law) is the most commonly reported type of entity reported by business and organisations, comprising 42% of the sample, followed by sole traders/freelance workers (16%), PTY (Ltd) structures (13%) and section 21 companies (11%), with smaller proportions of voluntary associations, trusts, and negligible numbers of partnerships and co-operatives.

Figure 9: Legal Structures - Businesses and Organisations



Most businesses and organisations have been in operation for a relatively short period of time, with the majority (39%) falling into the 1-5 year category, and 34% falling into a 6 – 10 year category.

Figure 10: Years in Operation - Businesses and Organisations

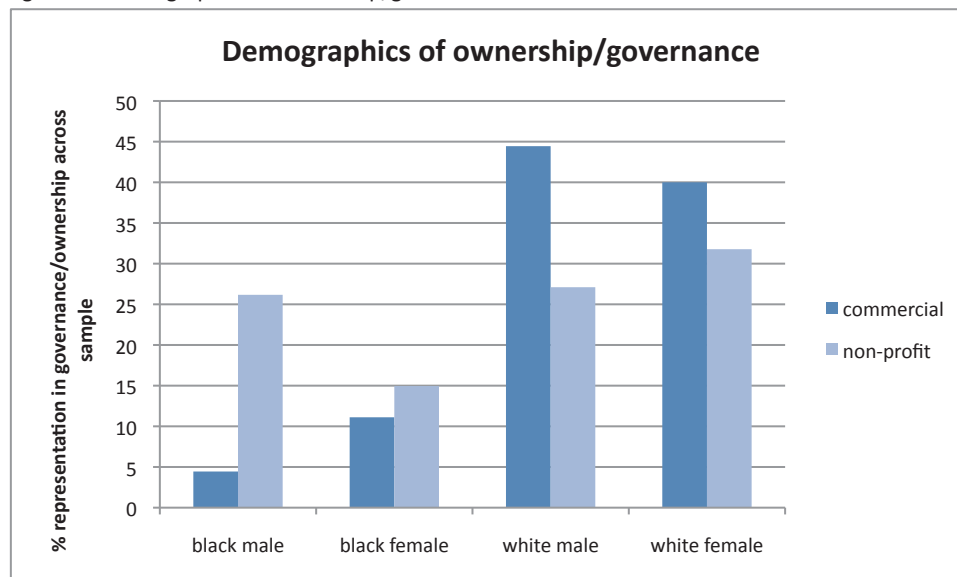


Ownership and Governance Demographics

The ownership and management of businesses and organisations in the sector is overwhelmingly white. However, while 89% of all entities reported their top manager or principal owner as being white, a slightly more nuanced picture emerged when the demographics of ownership (for commercial entities) and governance (for non-profit entities) was examined.

While commercial entities are overwhelmingly owned by white South Africans (with a roughly equal gender split), more than 40% of the membership of boards of non-profit organisations in the sector are black South Africans. The sample also suggests that black women are more likely to own business entities than black men, and white men are marginally more likely to have ownership than white women. Black men have substantially greater representation on the boards of non-profit organisations than they have shareholding in business ventures.

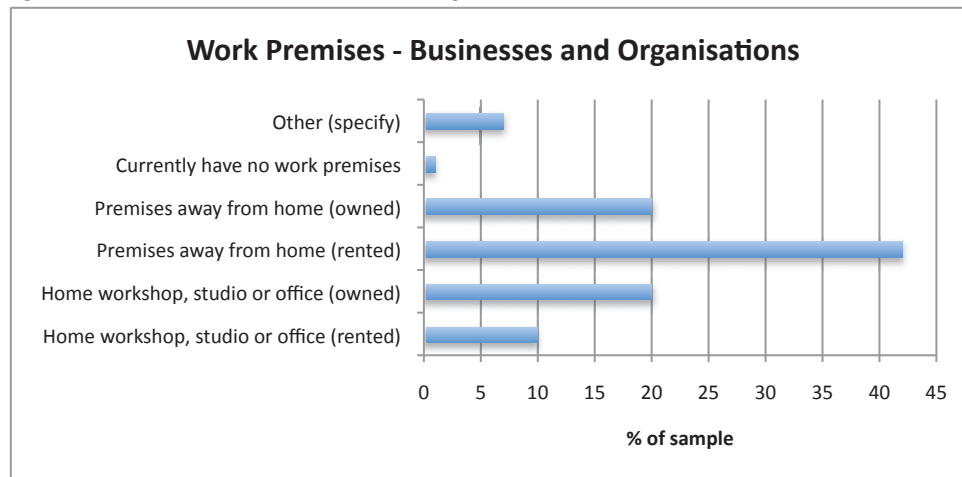
Figure 11: Demographics of ownership/governance



Premises

Most of the surveyed firms operate from rented premises, with equal but smaller proportions operating from home office/studios and owned premises away from home.

Figure 12: Work Premises - Businesses and Organisations



Firm Size – Income and Employees

Income variation is pronounced among businesses and organisations operating in the sector. Based on the sample from the survey, median income is approximately 30% of mean income. This disparity is most marked among organisations involved in the presentation of the visual arts (commercial and non-profit galleries). It is also important to note that this analysis excludes auction houses, art schools in tertiary institutions and public and private collections.

Table 8: Businesses/Organisations – Mean, Median and Minimum/Maximum Values (2008)

	ALL	Presentation/Distribution – Primary Market
N	59	25
mean	2 006 880	2 862 680
median	580 000	500 000
min	10 000	60 000
max	24 000 000	24 000 000
median as % of mean	30%	17%

There is also no straightforward correlation between firm size in terms of staffing and income, as evidenced by the contrasting profiles apparent in the following charts. The majority of business and organisations involved in the presentation and distribution of the visual arts fall within a fixed range of employees (between 1 and 10), but are distinguished by substantial variance in income – a reflection of the significance attached to a variety of less tangible factors than the size of their workforce in determining their output in terms of financial value. These key variables primarily constellate around the reputation or ‘subscription value’ of particular galleries and the artists that they represent, a set of factors that come into play most powerfully in the market for the contemporary visual arts, as noted in the discussion of the market for the visual arts in the ensuing section.

Figure 13: Firm Size (income)

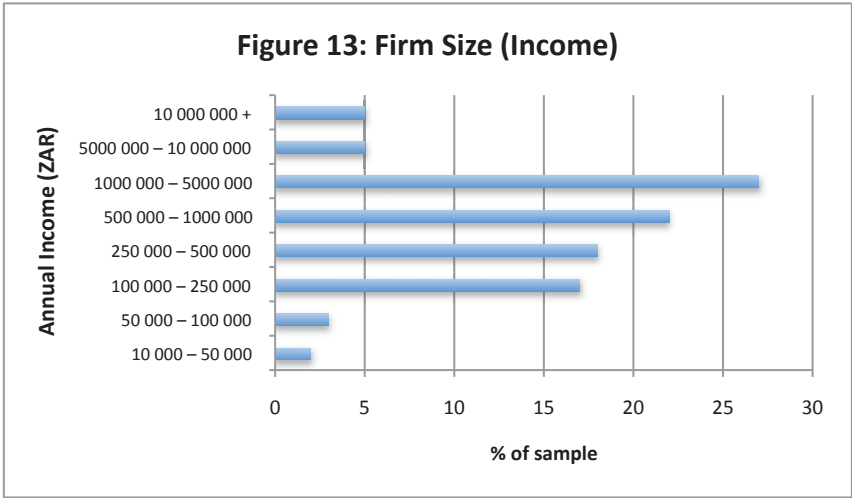
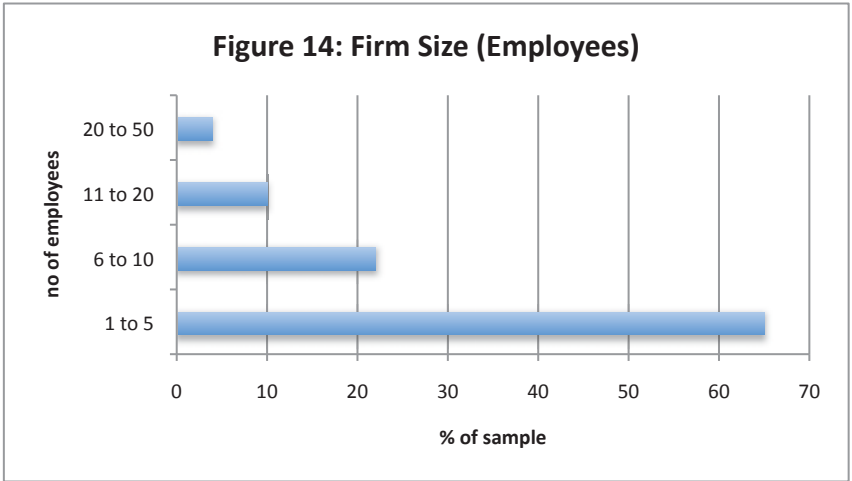


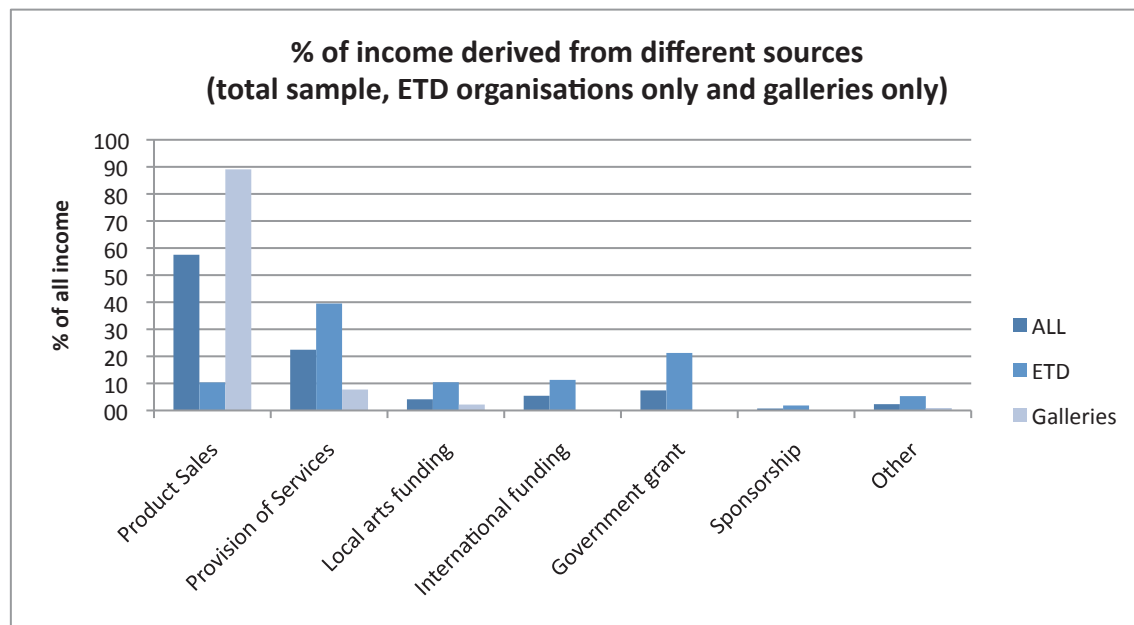
Figure 14: Firm Size (Employees)



Sources of income

Sources of income vary considerably for the different types of businesses and organisations included in the survey. These sources of income are summarised in the charts below for all organisations, together with a disaggregation for the two largest groups of businesses in the sector – organisations involved in the presentation of artwork in the primary market (mainly commercial) and education, training and development organizations (mainly non-profit):

Figure 15: % of income derived from different sources (total sample, ETD organisations only and galleries only)

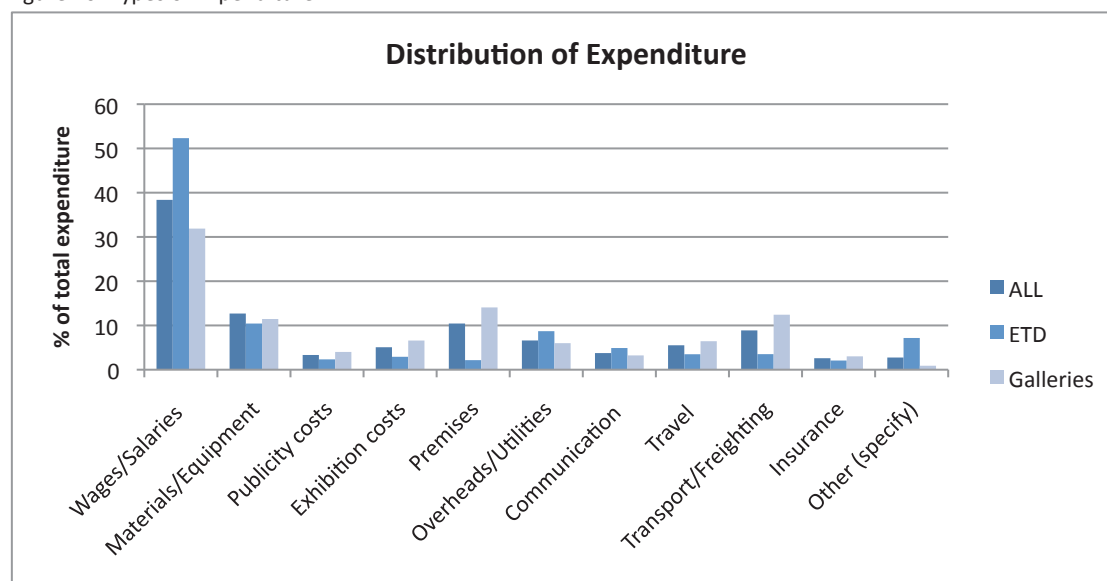


- 89% of Gallery revenue is derived from product sales, followed by 7,7% from the provision of services. Galleries attract insignificant amounts of external funding to support their work (2,3% of all income), the most significant source here being local arts funding agencies (2,2% of all income).
- Education, Training and Development organisations in the visual arts have a very different and more diverse set of sources of income than is the case for organisations involved in presenting and selling artwork. The largest single income source relates to the provision of services (39,5%), with the major overall proportion (45%) of income coming from a variety of sources of external funding – primarily from non-arts government funding (21,3%), international arts funding (11,3%) and local arts funding (10,4%). A small but significant portion of income is derived from selling artworks and other products (10%) – indicative of the need for such organisations to generate earned income to supplement (sometimes erratic) external funding.
- Based on the sample, the sector as a whole derives the greatest portion of its income through product sales (57,5%) and services (22,4%). Businesses and organisations derive only 17,7% of income from external funding and sponsorship. The actual proportion of external funding is probably significantly smaller, noting the skew within the sampling towards Education, Training and Development organisations. Corporate sponsorship plays a negligible role for most businesses and organisations, accounting for 0,7% of income across all organisations.
- Insignificant amounts of revenue are generated from a variety of other sources – the largest of these being the subletting of space (1,2% of all income across the sample).

Expenditure

The greatest area of expenditure for all entities is wages and salaries. Visual arts organisations involved in education, training and development record the highest costs in this area (over 50% of all expenditure), with organisations involved in distribution and presentation registering significant secondary costs associated with premises and transport and freighting of artworks.

Figure 16: Types of Expenditure



The mean value of assets held by entities is in the region of R1.8 million and the mean value of debts is estimated at R186 000. The GCMP study calculated the mean assets of the visual arts sector at R588 000 – however, this study conflated artists, businesses and organisations as a single category, working with a substantially more aggregated approach weighting the economic dimensions of these different entities. As noted in section 5 of this report, the mean assets of artists are in the region of R170 000. If one treats artists as organisational entities alongside business and organisations, then the mean value of the assets of all entities is in the region of R234 000.

87% of entities reported being registered for income or company tax, and 52% of entities reported being registered as VAT vendors with the South African Revenue Services, seemingly suggesting a relatively high degree of compliance with tax regulation.

Access to Funding and Finance

51% of the surveyed organizations and businesses indicated that they had applied for funding from a governmental or private source during the course of the past three years. The organisations most likely to apply for funding were education, training and development entities – 78% of these organizations applied for funding versus only 33% for businesses involved in the presentation and distribution of visual art.

Of those that did not apply for funding, 52% indicated that they had not need for external funding of their work, and 18% believed that there would be no likelihood of such an application being successful. The most frequently cited agencies approached among those who did apply for funding were the National Arts Council (53% of those who applied), international arts funding bodies (50%), variously levels of government (between 19% for local government and 44% for national government). 42% had approached either Business Arts South Africa or a corporate source for funding.

The sources of funding that registered the highest success rate for proposals were international funding bodies and private patrons, with 83% of those that applied for international funding indicating success. The success rate in submissions to government ranged between 43% and 69%, and 67% of approaches for corporate funding or sponsorship

were recorded as being successful. Unsurprisingly, international funding bodies were regarded by the largest portion of respondents (37%) as being the most responsive to the needs of the visual arts sector, followed by the National Arts Council (17%) and corporate sponsors (14% of respondents). The majority (41%) of respondents regard the most important purpose for arts funding as supporting artists in their work, with the second most important priority (20% of respondents) being the promotion of capacity building within the sector through conferences, workshops and the like.

When correlated against the data on income from funding, this suggest that while the sector relies on funding to a fairly small degree, there is a reasonably high success rate for funding applications when they are made. The issue of funding is explored in greater detail in section 7 of this report: Resourcing the Visual Arts.

Only 21% of entities reported having applied for loan finance or credit during the course of the past three years, with the majority indicating that they had no need for loan finance, or insufficient collateral to support such an application, or would be unable to repay a loan. Of those that did apply for loan finance, a striking 87% were successful. A further 20% of the sample indicated that they had obtained a loan from an informal source during the course of the past three years, suggestive of the importance of family and social networks in supporting business development in the sector.

Perception of Obstacles and Needs

Respondents were presented with a variety of specific obstacles and problems for the development of their organisations and enterprises, grouped into five areas (business costs, market conditions, access to resources, the industry and regulatory environment and the general socio-economic context). Respondents were asked to rank these on a scale from 'major' through to 'irrelevant', with the requirement that only three issues could be identified as being of critical importance. The most frequently cited major obstacles for businesses and organisations were

- o Lack of industry support from government (37% of all respondents)
- o Lack of access to funding (35%)
- o Weakness in Demand for Product (21%)
- o The high costs associated with premises and publicity (both 16%) and utilities (14%)
- o Crime (13%) and Customs/Trade regulations (12%) were also accorded a significance by respondents
- o Owners of commercial organisations were marginally less likely to cite government support and funding as key issues

Respondents were also asked to identify their key needs around business development. These were fairly evenly spread across a range of primary issues, with help in obtaining access to government funding (19%) and developing new methods for cash generation (14%) and staff training (13%) being the most frequently cited primary needs. The most frequently cited secondary needs were help in obtaining commercial funding (18%), assistance with marketing (17%) and assistance with strategy and business planning (15%).

Membership of Industry Bodies/Associations

The somewhat fragmented nature of the sector is apparent from the fact that only 44% of all entities included in the survey report membership of an industry body or association, with the highest rates of membership being among education, training and development organizations (78%), and only a third of other types of organisation reporting membership. Half of those who indicate that they are not members report the fact that they have "no

interest in such bodies” as being the primary reason for non-membership with a smaller proportions indicating that they do not believe any benefits attach to such membership (21%) or that they are unaware of what the benefits are (18%). Among those who indicate membership, the most frequently cited benefits are access to networks (49%), information (22%) and marketing opportunities (14%).

2.7 Work and Employment in the Visual Arts

This sub-section examines the size, shape and characteristics of the labour force for the visual arts sector in South Africa, drawn from the surveys of business and organisations, museums and collections and artists. The section aims to summarise data related to:

- o the overall number of people working in the sector in different capacities
- o the demographics of the workforce
- o work status and earnings
- o levels of education

2.7.1 Estimated Numbers of People Working in the Sector

Based on a combination of database research and employment data provided by artists, institutions, businesses and organisations, it is estimated that the visual arts industry provides work for approximately 17 700 people. This is broken down as follows:

Table 9: Composition of Visual Arts Workforce	
Employees and Freelance/Contract Workers⁸	9 425
Senior Management	1456
Middle Management	1136
Specialist/Technical Staff	3066
Ancillary Support Staff	2244
Volunteers	1523
Professional Artists (full-time and part-time)⁹	5 500
Full Time	1 045
Part Time	4 450
People who work for artists¹⁰	2 783
Administrators	715
Assistants	1661
Specialised Staff	407
TOTAL	17 708

Important qualifications:

⁸ Based on data from survey of businesses and organizations, and survey of museums and collections

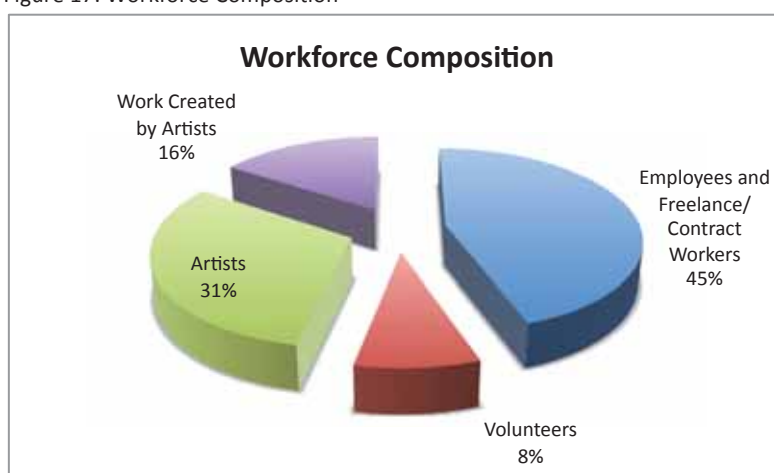
⁹ For the purposes of this study, full-time artists are defined as artists spending more than 70% of their work time on their core creative activity; data extracted from survey of artists

¹⁰ Based on data from survey of artists.

- It is likely that there is a degree of duplication between the figures for artists and both the part-time employees and short term/contract personnel for artists, businesses and organisations – many businesses and organisations in the sector provide income-earning work for artists, and artists often employ other (younger, upcoming) artists as, for example, assistants.
- Staff reported by private and public museums and collections have been assumed to be full-time staff.
- The GCMP study estimated employment for the sector in Gauteng at 2400 persons. As the above figures indicate, this is likely to represent an under estimation. Based on the spread of the industry revealed through database research, the figure for Gauteng is likely to be in the region of over 5000 people, with the preceding qualifications noted.

Taking the above qualifications into account, artists constitute and account for approximately half of the workforce, taking into account the people that they provide work for:

Figure 17: Workforce Composition



2.7.2 Demographics

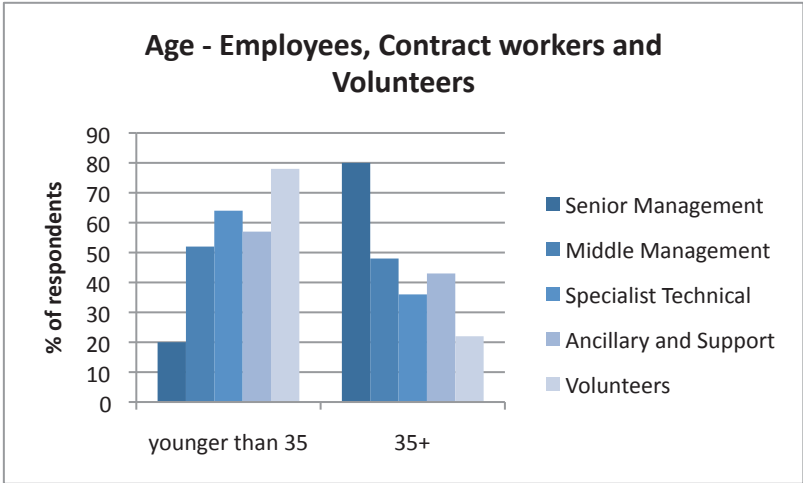
Age

The mean and median ages of the sampled artists were 40 and 38 years old respectively (the latter figure providing a more accurate indication of the age distribution of artists), with a significant majority of the sampled artists (37% of the sample) falling into the 26-35 age group and 45% of the sample being less than 35 (classified as 'youth' in SA public policy terms). This is almost identical to the overall age profile of employed people within the South African labour market (46% being under 35 in 2008)¹¹.

Employees and contract workers were substantially younger than the artist group (and the general employed population) with 58% of employees, contract workers and volunteers reported as being youth (less than 35 years old), with an unsurprising correlation between age and seniority.

¹¹ Statistics South Africa. 2010. Quarterly Labour Force Survey. Statistics South Africa: Pretoria. Section 2-3

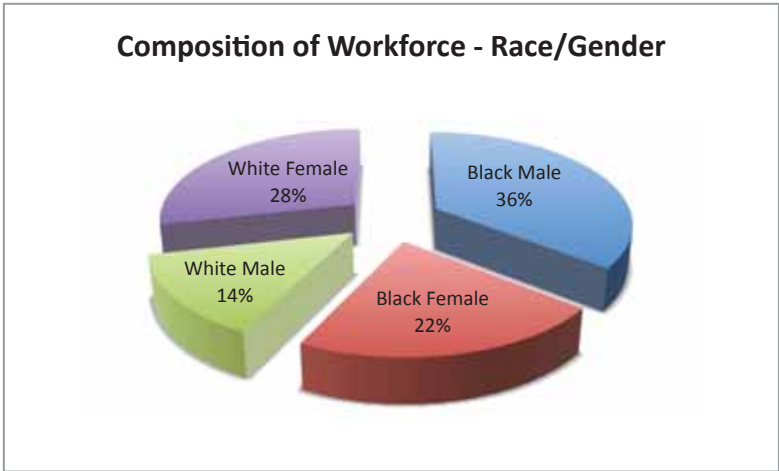
Figure 18: Age – Employees, Contract Workers and Volunteers



Race/Gender

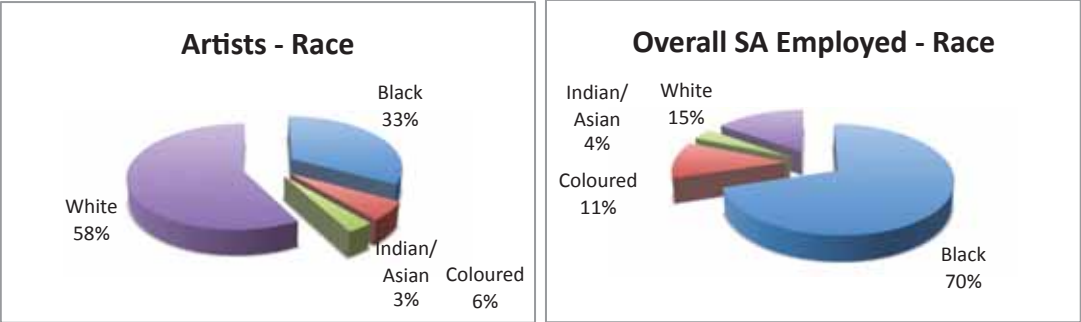
58% of the total workforce is black, and the workforce is evenly split between men and women (49,7% and 50,3% respectively). These demographics are however differentiated quite dramatically across different sections of the workforce. The following chart shows the combined demographics of artists, freelance professionals, employees and short term contract workers in businesses and organisations.

Figure 19: Composition of Workforce



However, in contrast to the overall profile of the workforce and the overall SA labour market, the survey found that the majority of visual artists are white:

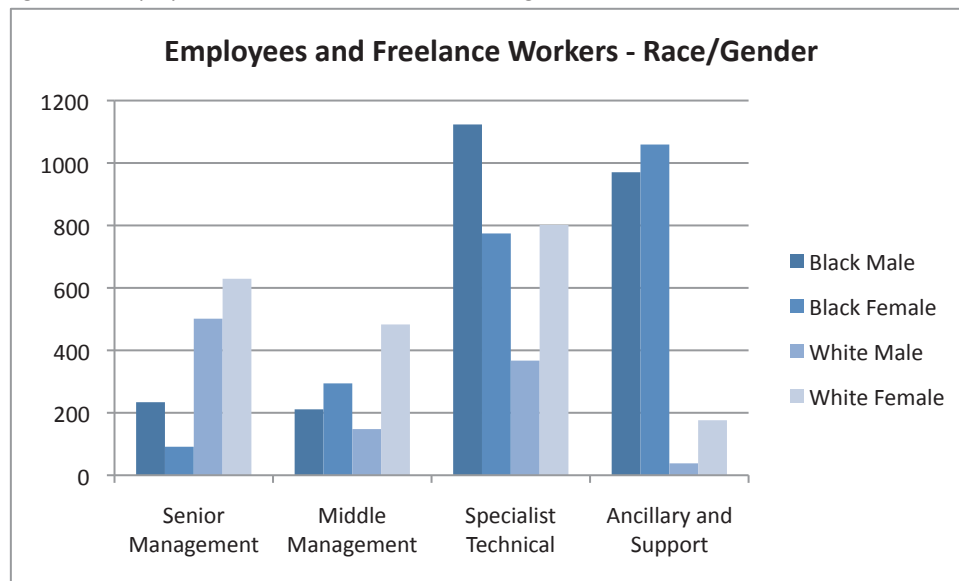
Figure 20: Artists – Race vs Overall SA Employed



The demographics of the artist population are explored in greater detail in Section 5 – the Position of Artists.

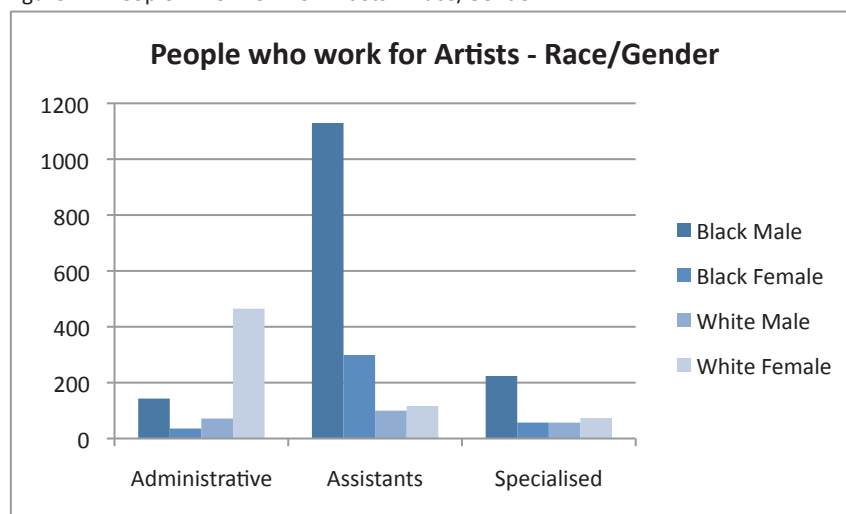
Among employees of organisations, businesses and institutions and freelance and contract workers, demographics are quite sharply differentiated across different roles, with the greatest proportions of white men and women in senior management positions and black men and women most prevalent in specialist/technical and ancillary and support roles within the industry.

Figure 21: Employees and Freelance Workers – Race/gender



As previously noted, a significant portion of the workforce in the sector is comprised of people that artists provide work for in a variety of roles. The following chart breaks down the composition of this group on the basis of race and gender.

Figure 22: People Who Work for Artists – Race/Gender



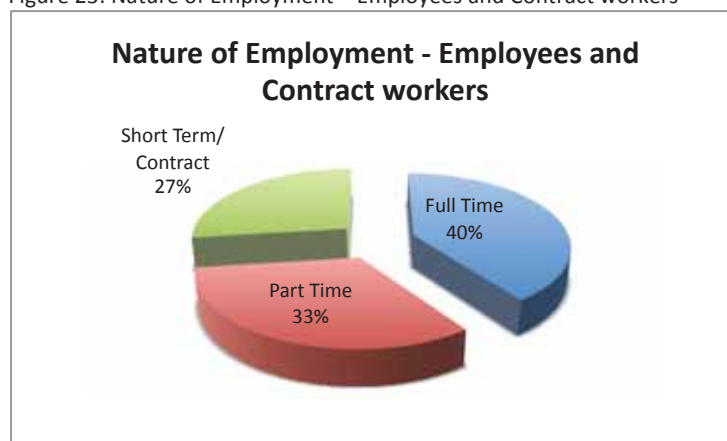
Disability

The survey did not produce any reliable findings regarding levels of disability in the workforce. Indication of disability was not directly requested in the artist survey, though artists were asked to register whether or not they felt discriminated against on the basis of disability or illness. 2% of the artist population identified this as a major issue, a further 2% identified this as a significant issue, 9% saw it as being a minor issue and 85% felt this was irrelevant. Among the 71 organisations included in the survey of business and organisational entities, only three disabled people were identified in the workforce, a rough extrapolation would therefore suggest that 0,2% of the workforce other than artists are disabled. Based on responses from artists to the issue of discrimination on the basis of disability, this figure may be higher.

2.7.3 Work Status and Earnings

Excluding artists and volunteers, 40% of the balance of workers in the visual arts sector (circa 11 000 people) are employed on a full-time basis, 33% on a part-time basis, and 27% on a short-term contract basis. This contrasts sharply with the findings reflected in the GCMP study, which suggested that 84,8% of employees could be classified as full-time – possibly a function of the conflation of artists, businesses and organisations in that study.

Figure 23: Nature of Employment – Employees and Contract workers



Only 7% of artists indicated that they were engaged in full-time employment, with the balance effectively being self-employed:

- 56% reported no formal legal status,
- 24% reported status as a sole trader/provisional tax-payer and
- 14% reported that they conduct their work through some form of legal entity

The full-time employment figure may in fact be slightly higher than reported here. Artists were asked to indicate what form of legal entity they *conducted their work as a visual artist through*. Scrutiny of the raw data from the survey shows that some artists who are in fact employed as lecturers at tertiary institutions indicated 'self-employed, no formal legal status' – correct in relation to their work as a visual artist, but not an accurate reflection of their overall employment status. This is an issue that would need to be clarified/corrected in future research.

In order to better understand the complexities of the artist as an occupational category relative to more conventional forms of employment and work, the survey also involved

detailed inquiry into how artists organise their work time. Only 19% of artists indicate that they are able to spend more than 70% of their time on their creative activity and immediately linked activities – these may be regarded as ‘full-time artists’. The majority (57%) of artists fall into a middle ‘part-time’ group able to spend between 25% and 70% of their time producing artwork, and a quarter of the surveyed artists were able to spend less than a quarter of their time producing their own creative work – ‘minor time’ artists forced to squeeze this activity in among a range of other commitments, largely income-related.

Data from the survey of businesses and organisations suggests average earnings of approximately R105 000 per annum for people working in the sector (excluding artists), aggregating data across all categories of employment (from owners/managers through to ancillary workers). This figure does not take into account the earning of staff in public museums and collections or academics in tertiary institutions, which would be likely to push the overall figure up. The GCMP study indicated annual earnings of more than R130 000 per annum for employees in the sector, which is broadly consistent with findings in this study if one considers that the GCMP study reflected mean wage levels for artists, businesses and organisations as a single category. As noted in section 5 of this report, the mean income of artists included in the survey was R150 000, which would further push the overall figure reflected here. This economic position of artists is explored in substantially more detail in section 5 of this report.

2.7.4 Levels of Education

The work force for the visual arts is highly educated:

- o 72% of artists have a university degree (38% postgraduate)
- o 19% of all people employed by artists have a university degree
- o 48% of all workers and employees of firms included in the sample have acquired a university degree (19% postgraduate).
- o 78% of top-managers/principal owners of businesses and organizations have a university degree (40% postgraduate)

Figure 24: Highest Level of Education - Employees

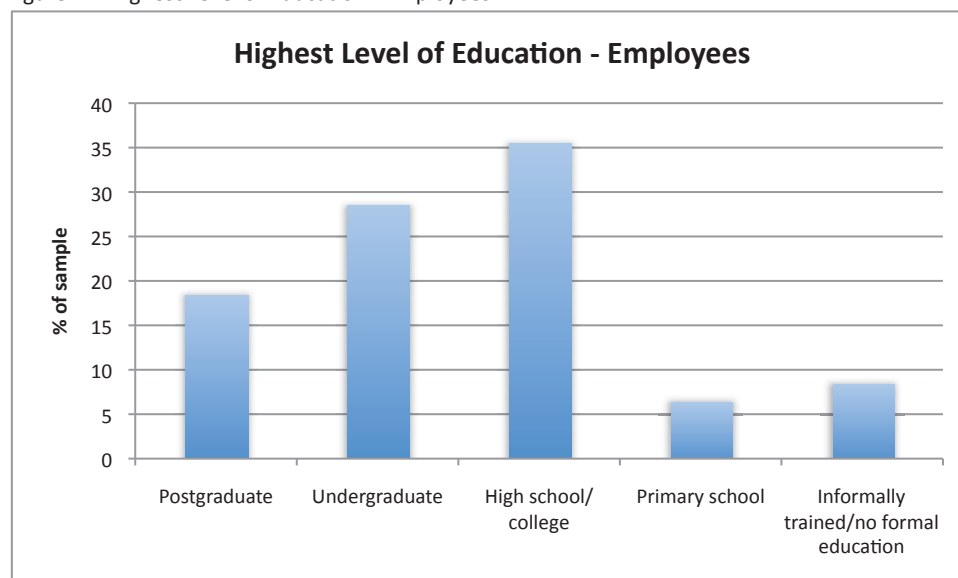
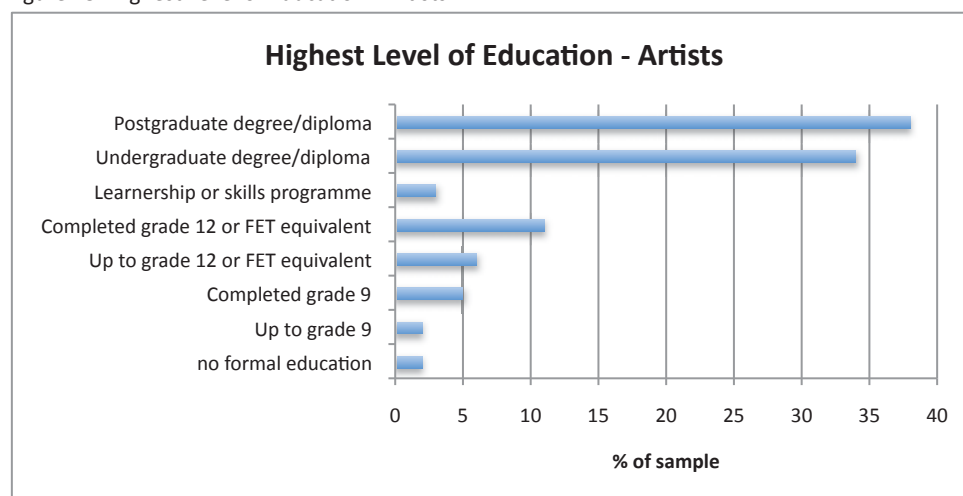


Figure 25: Highest Level of Education - Artists



2.8 The Economic Impact of the Visual Arts

This section attempts to measure the quantifiable contribution of the visual arts sector to the South African economy. This includes the primary (or direct) impact and also the secondary (or indirect) impact through multiplier effects. This information was derived from the detailed data provided by artists, businesses and organisations related to their income and expenditure during the 2008/9 financial year.

2.8.1 Gross Value Added

As the term suggests, Gross Value-Added (GVA) measures the added value that the sector produces in the national economy. The Gross Value-Added of an industry or sector reflects its contribution to Gross Domestic Product (GDP) after deducting the cost of raw materials, services, utilities and other purchases from the turnover of the industry. GVA is comprised primarily of the wages, salaries and surplus/profit generated by a particular sector the economy.

The GVA for the visual arts has been determined by calculating the value of the turnover of the sector minus the cost of producing that value (excluding labour and capital costs). Due to the fact that the current framework for the collection of economic data at a national level (through Statistics South Africa) does not disaggregate this data for the visual arts, this information has been extrapolated from information on income and expenditure provided by respondents to the survey component of this research project.

The total turnover for the sector was calculated based on information relating to total revenue generated by a sample of 293 businesses, artists and organisations included in the survey. Mean/average figures for revenue generated were adjusted as follows:

- Artist mean income through gallery sales was subtracted from the calculation of mean artist income to avoid double counting with the turnover generated by galleries
- Based on an analysis of the sample, the median/midpoint value for training and development organizations (including visual arts NGOs, arts associations and private

providers) was selected as a basis for calculating GVA – in order to address a skew in the sample toward larger, more established NGOs and private providers

- Similarly – as with the calculation of revenue from gallery sales and associated services in the preceding section on the size of the visual arts market - an aggregate of mean and median values was selected as the basis for calculation of turnover for entities involved in the distribution and presentation of the visual arts
- For materials suppliers, publishers and other specialist service providers the mean value was selected as a basis for calculation

This data was then extrapolated to the full sample, as follows:

Table 10: Total Turnover Generated by the Visual Arts sector

	artists	training and development	distribution/presentation	materials, services, publishing	sector
Turnover calculations					
sample	232	16	29	16	293
sample turnover	31 634 894	39 110 286	65 010 998	8 135 497	143 891 675
mean turnover	149 809	2 444 393	2 241 759	508 469	
mean turnover (adjusted)	120 952	1 194 257	1 410 911	508 469	286 459
population	5 500	176	632	181	6 489
total turnover (population)	665 233 552	209 711 529	891 695 549	92 134 504	1 858 775 133
% of total turnover	35,79	11,28	47,97	4,96	

The Gross Value Added for the visual arts sector was then generated by subtracting all costs, excluding wages and salaries and related costs (such as commission payments), from the mean turnover of all entities operating in the sector. Income from public funding sources and from work outside the sector were then deducted from these values. These figure were then extrapolated from the sample to the full population of individuals and organisations to yield a total Gross Value-Added figure of approximately R791 million for the sector as a whole, as follows:

Table 11: The Direct Contribution of the Visual Arts to South Africa's GDP: Gross Value-Added

	artists	training and development	distribution/presentation	materials, services, publishing	sector
GVA calculations					
sample	232	16	29	16	293
mean output	149 809	1 194 257	1 410 911	508 469	
minus galleries sales (artists)	120 952				
minus SA public investment	119 998	815 939	1 380 853	491 637	
minus income from work outside the sector (artists)	106 292				
adjusted output	106 292	815 939	1 380 853	491 637	
mean input costs (excluding labour costs)	60 606	410 055	723 912	194 311	
output - input (mean GVA per entity)	45 686	405 884	656 940	297 326	
population	5500	176	632	181	6 489
sample as % of population	4,22	9,11	4,59	8,83	4,52

Total GVA	251 271 658	71 273 149	415 186 337	53 875 471	791 606 615
% of total GVA	31,74	9,00	52,45	6,81	

Important qualifications that should be noted:

- The sample sizes used as a basis for extrapolation are small – approximately 6-7% of the total population of artists, businesses and organisations working in the sector. Future quantitative research in this area should also take a more segmented approach to particularly the commercial gallery sector – separating out contemporary art galleries (where a small number of galleries have a very high turnover) and galleries that deal in the so-called ‘commercial’ genres primarily.
- The economic contribution of amateur artists was excluded from this analysis
- The output and GVA associated with artists are probably inflated – the median value for output for artists is substantially lower than the mean value recorded through the survey (R90 000 vs R150 000 per annum), and it was not possible to accurately estimate the median input costs for artists at a level of detail.
- The following types of entity were excluded from the sample due to either difficulties associated with accessing or disaggregating accurate data, or the fact that they are large institutions sustained in the main through public funding, and their inclusion in calculations of Gross Value Added would therefore involve double counting.
 - University art schools and Public educational institutions
 - Public and private museums and collections
 - Funding agencies
 - Auction houses
- The most significant exclusion among the above in relation to the calculation of GVA is the turnover of auction houses – a small group of businesses that generate a very large (and growing) proportion of the overall turnover of the industry. The on-line auction sales information service for the South African secondary market, ArtVault, informally estimates total turnover to be in the region of R500 million per annum¹² - effectively 20% of the entire turnover of the sector being generated by approximately 10-15 entities, with a presumed high value-added ratio per entity. As noted previously, substantial sensitivity exists around the release of detailed information related to income and expenditure, which has made integrating the (substantial) contribution of these businesses to overall sector GVA difficult at this stage.

In spite of these qualifications, these figures broadly correlate with the results for GVA produced through the Gauteng Creative Industries Mapping Study, which estimated that the visual arts sector in Gauteng alone generates R400 million in turnover and GVA of R191 million¹³. By comparison, an Australian study, drawing on a variety of data sources, estimated the total Gross Value Added for the Australian industry as being A\$162 million in 1996/7 (R1,068 billion)¹⁴. The 2009 Creative and Cultural Skills *Visual Arts Blueprint* estimates that the GVA of the UK visual arts sector as £1.9 billion (R21,7 billion)¹⁵, suggesting

¹² Personal communication, Dale Sargeant, March 28 2010; see also www.artvault.co.za

¹³ AMERU and CAJ. 2008. Gauteng's Creative Industries: An Analysis. Gauteng Department of Sports, Arts, Recreation and Culture.

¹⁴ Department of Communications, Information Technology and the Arts. 2002. Report of the Contemporary Visual Arts and Crafts Inquiry. Commonwealth of Australia: Canberra. P. 43

¹⁵ Creative and Cultural Skills. 2009. The Visual Arts Blue Print: a Workforce Development Plan for the Visual Arts in the UK. London, England.

that the South African sector produces approximately 5% of the economic value of the visual arts in the UK.

Compared to other parts of the creative industries in South Africa, these findings also suggest that the visual arts have a surprisingly significant position within the wider creative industries economy in the country. The 2008 Annual Book Publishing Industry Survey Report estimates the total turnover of the book publishing industry to be just over R4 billion in that year¹⁶. The Gauteng Music Industry Strategic Framework report suggests that the music industry has an annual turnover of over R3.5 billion (the combined value of the recording, live performance and music publishing)¹⁷.

A number of additional points can be made on the basis of this analysis:

- o Notwithstanding the qualifications noted above, the direct economic value generated by artists is substantial, accrued largely through turnover associated with private sales and commissions. This also suggests that a significant portion of the visual arts economy operates in a highly dispersed form outside of the context of the supply system of galleries.
- o The 5 largest galleries and gallery groups account for an estimated 5-10% of the total turnover and value-added of the sector. While they do not occupy the same position that for example the major publishing houses occupy in the publishing industry, they generate substantial value from a comparatively low asset base by comparison with for example, the music recording and audio-visual production industries. Their capacity to do so has for the most part been nurtured over a substantial period of time, and is predicated on the development of a strong international buying market. The need for the development of mechanisms to support the migration of more enterprises to this end of the industry – in addition to new entrants – is indicated.

2.8.2 The indirect contribution of the visual arts sector to the economy

The indirect contribution of the visual arts sector to the South African economy is substantially larger. Wages and salaries earned by workers in the sector are used to buy goods and services in other sectors. The visual arts sector also buy inputs from other sectors. These indirect impacts are called multiplier effects. Estimates for a South African output multiplier vary between 1.4 and 3.6¹⁸. The higher multiplier is for models that assume that the South African economy is closed i.e. money generated in South Africa remains in the country. This assumption is likely to be false, and the actual multiplier is likely to be closer to the open model estimate of 1.4. While no reliable multipliers exist for the visual arts sector in South Africa, estimates of output multipliers for the Singapore creative industries vary between 1.27 and 1.78. Value-added multipliers for the same industries vary between 0.48 and 0.72. In the United Kingdom output multipliers vary between 1.56 and 1.86 and value-added multipliers between 0.83 and 0.95¹⁹. Given the estimated South African output multipliers and the multiplier range for the UK and Singapore, the chosen multipliers for the visual arts sector of 1.86 for output and 0.9 for value-added are realistic. These multipliers

¹⁶ Galloway, F and Struik, W. 2009. Annual Book Publishing Survey Report 2008. University of Pretoria/Publishes Association of South Africa. pp23-25

¹⁷ Shaw, J & Rodell, R. 2009. Gauteng Music Strategic Framework. Unpublished research and strategy document of the Gauteng Department of Sports, Arts, Recreation and Culture.

¹⁸ van Seventer, D.E.N., 1999, "The Estimation of a System of Provincial Input-Output Tables for South Africa, *Studies in Economics and Econometrics*, July.

¹⁹ Toh Mun Heng, Adrian Choo and Terence Ho, 2003, Economic contributions of Singapore's creative industries, *Economic survey of Singapore first quarter 2003*.

have been applied as follows to yield a figure of R5.2 billion for total turnover generated directly and indirectly, and just over R1.5 billion for direct and indirect GVA produced by the sector:

Table 12: The Total Contribution of the Visual Arts Sector to the South African Economy					
	artists	training and development	distribution/ presentation	materials, services, publishing	sector
Direct output/turnover	665 233 552	209 711 529	891 695 549	92 134 504	1 858 775 133
Indirect total output	1 197 420 393	377 480 753	1 605 051 988	165 842 106	3 345 795 240
Total output (direct + indirect)	1 862 653 945	587 192 282	2 496 747 537	257 976 610	5 204 570 373
Direct GVA (sector)	251 271 658	71 273 149	415 186 337	53 875 471	791 606 615
Indirect GVA	226 144 492	64 145 834	373 667 704	48 487 924	712 445 954
Total GVA (direct + Indirect)	477 416 149	135 418 984	788 854 041	102 363 395	1 504 052 569

2.8.3 The Contribution of the Sector to the Creative Industries

Aside from the direct economic impact of the visual arts, the sector also plays a significant role in the development of the creative industries more generally. The contemporary end of the sector is fundamentally invested in the generation of new ideas, ways of seeing the world, and is increasingly predicated on cross-disciplinary interaction and creative collaboration with other parts of the creative and media industries, including advertising, industrial design, fashion, music and publishing. While, these collaborations may initially have a minimal economic dimension, they provide a trigger for innovation and new products and services in these other fields. Innovation in the visual arts impacts on product development in craft and design, and people trained as visual artists produce additional value through work in these sectors. The emblematic cross-pollination between art and design in the South African context is Carrol Boyes Functional Art – a national and internationally feted wholesale and retail manufacturer of a range of household items, developed by a sculptor. Product developers in the craft and design realm frequently come from a contemporary or fine arts training. The lines between contemporary art and design have also been blurred in new ways in the context of galleries such as Co-op which features cutting edge, challenging work that straddles the worlds of art and design, and in projects that facilitate collaboration between the two worlds, such as the Joburg Art Fair, which includes a strong contemporary design component.

The visual arts have also come to occupy a significant position in thinking around urban development and creativity. The idea of the ‘creative city’ has become a commonplace in the language of urban development, with the fostering of precincts and districts being seen to reap a variety of social and economic benefits, and contributing to the development of a distinct sense of place and identity for city communities. The work of Charles Landry has played an important role in the evolution of the concept of the Creative City, operating within a similar ‘creative economy’ framework to that of Richard Florida:

“Cities have one crucial resource – their people. Human cleverness, desires, motivations, imagination and creativity are replacing location, natural resources and market access as urban resources. The creativity of those who live in and run cities will determine future success. As cities became large and complex enough to present problems of urban management so they became laboratories that developed the solutions – technological, conceptual and social – to the problems of growth”. (Landry

2000)²⁰

International experience has shown that artists and arts infrastructure frequently play a key role in the revitalisation of particularly inner city contexts, their presence and activity in depressed neighbourhoods catalysing and attracting subsequent investment from both the private and public sectors, and progressively impacting on property prices and the rates base in these areas (sometimes in a manner in which leaves visual artists unable to afford to live in these neighbourhoods subsequently).

Locally, Johannesburg has registered the most pronounced development in this area nationally. The east end of the inner city of Johannesburg – one of the areas of Johannesburg most impacted on by the sharp decline of the inner city that occurred during the course of the 1980s and 1990s - has seen the visual arts playing a leading role in inner city regeneration during the course of the last decade. Occurring initially in a very dispersed way through independent initiatives such as the August House development (a converted industrial building providing low cost studio, live/work and production space for visual artists), the Joubert Park Project (an artists collective running an international residency programme and projects focused on experimental work in public space) and the Parking Gallery (a zero budget artist-run project space), the area has in the last two years seen the development of an ambitious visual arts precinct around the Arts on Main complex. The project has involved the conversion of a number of city blocks on the eastern edge of the inner city by a property development company, Propertuity, and now includes a number of high end commercial galleries, project spaces, residency programmes, artist studios, a specialist art bookshop, relive/work space for artists, contemporary design studios, an independent cinema space, a boutique hotel and restaurant. It has transformed perceptions of a part of the inner city that was previously regarded as a no-go area by suburban and township residents alike, and has triggered a variety of other public and private investments in the surrounding area, now branded as the Maboneng Precinct. A second art and design precinct is now also emerging in Braamfontein, in the north west quadrant of the inner city.

Parallel to these developments, government and the corporate sector have been involved in the commissioning of major programmes of public art, largely focused around the inner city of Johannesburg. Driven by the Johannesburg Development Agency, these have included the commissioning of public art for the Faraday taxi rank and parks across Hillbrow, Berea and Yeoville in the context of urban upgrade programmes, as well as the development of a number of iconic works strategically positioned at points of entry into different parts of the inner city, including works by William Kentridge, Gerard and Maja Marx, Winston Luthuli and Doung Anwar Jahangeer.

2.9 The Wider Impact of the Visual Arts

While the impact of the sector in the economic realm is substantial, the most significant contributions of the sector may lie elsewhere from a public policy perspective. This is particularly true of the more contemporary or fine arts dimension of the sector, involved as it is in the generation of compelling and powerful representations, which can shift how we see the world. Artworks impact on individuals on an aesthetic, intellectual and emotional level, and can operate as a powerful medium for critical inquiry and reflection on our contemporary experience, imaging and reimagining the social, cultural, political and ethical dimensions of this experience. Through the manipulation of imagery and materials, artists

²⁰ Landry, C. 2000. *The Creative City: A Toolkit for Urban Innovators*, Earthscan Publications Ltd: London.

generate new questions, propositions and possibilities about who we are in a rapidly changing and complex world. Given the comparative smallness of the South African visual arts economy, the country has produced a surprisingly large number of artists who are internationally recognised and celebrated for the originality and power of their vision in these terms. Locally, access to this work is largely confined to the formal institutional and commercial settings of galleries and art museums, an issue which is discussed in greater detail in the ensuing section – Demand for the Visual Arts.

These intrinsic dimensions of visual arts practice have however provided a basis for the sector to make unique contributions in a variety of other areas, involving an interweaving of social, cultural and economic impacts and reaching publics that would not normally necessarily venture into the formal spaces of art museums and galleries. These impacts are summarized in the following table:

Table 13: Summary of Visual Arts Impact

Area of Impact	Nature of Impact
Urban Development	Through public art and visual arts precincts: • contribution to local sense of identity, connectedness and pride • enhanced awareness of the physical environment • attractor for new investment from other sectors
Education and Learning	In early Childhood Development: • improved motor control and observational skills • increased vocabulary and improved verbal abilities • enhanced capacity for non-verbal expression In Schools: • heightened enjoyment, excitement, fulfilment and therapeutic release of tensions • increased skills and knowledge associated with particular artforms • enhanced knowledge of social and cultural issues • advances in personal and social development • development of creativity and thinking skills and the capacity for lateral thinking • enrichment of communication and expressive skills • knowledge of social, environmental and citizenship issues • enhanced achievement in other subject areas
Public Health	In the general population: • enhanced sense of well-being and connectedness through access to arts experience In health-care and social development contexts: • the visual arts represent a powerful tool for therapeutic interventions related to both physical and mental health • enhanced recovery rates for patients in hospital environments where visual arts have been integrated into overall design
Community development and empowerment	In the context of community arts programming: • outcomes related to the building of confidence and an enhanced sense of self through participation in the visual arts • economic outcomes associated with new skills and job creation • point of departure for development of new talent outside of formal learning pathways
Advocacy	• increased awareness and the fostering of debate in the wider

environment around significant contemporary issues in an evolving democracy – eg human rights, freedom of expression and the like

In many of these areas, the tangible outcomes of activity are often difficult to precisely measure, concerned as they are with impacting on the quality of life of citizenry. The meaningful measurement of quality of life impacts present a range of conceptual, methodological and cost issues from a research and evaluation point of view, and much inquiry has been devoted to the question of how to register and validate these impacts in a methodologically rigorous manner.²¹ This kind of measurement has been beyond the scope of the present research project, which has confined itself to producing a qualitative sense of these impacts, registered in a series of case studies on particular individuals, organisations and projects located around the country – see Appendix F.

2.10 Overview of Government Engagement with the Sector

As noted earlier in this section, the survey found that ‘lack of industry promotion from government’ with the sector was the most frequently cited perceived major obstacle to sector development for businesses and organisations, out of a list of 36 distinct issues. For artists (cf section 5 of this report), this issue was the fourth most frequently cited perceived major obstacle to their development, out of a list of 39 different issues.

At a National Level

Historically, engagement with the visual arts sector on the part of government has largely occurred through the financing of public art museums and collections, the provision of grant funding through the National Arts Council and on an ad-hoc basis in the funding of initiatives in the sector through the Visual Arts Division of the Multi-Media Directorate. This support has not however historically been informed by any strategic consideration of the particular nature of the sector on the one hand and its potential contribution to a variety of social, cultural and economic mandates on the other. Other sectors perceived to yield substantially greater immediate return on investment with regard to poverty alleviation, job creation and overall economic impact have historically received greater priority from the national department: craft, music, film and publishing.

Unsurprisingly, the visual arts operate at the margins of public sector industrial policy, which fall within the domain of the Department of Trade and Industry (dti). The policies and strategies of the Department of Trade and Industry for trade/export incentives and financing industry promotion do not directly address the visual arts. Since 2003 the Department has however become increasingly engaged with other parts of the creative industries and has developed Customised Sector Programmes for craft and film in 2005, which have involved industry analysis and the identification of a variety of industry-specific support measures, incentives and rebates. The 2010/11-2012/13 Industrial Policy Action Plan (IPAP), makes provision for the craft, film and music sectors, but not visual arts.

Within the dti, the visual arts are viewed as more individualistic ventures and there is a felt need for information on the sector, and presentations by representative organisations.

²¹ See, for example, Hill Strategies Research Inc. 2008. *Social Effects of Culture: Exploratory Statistical Evidence*. Statistical Insights on the Arts, Vol 6, No 4. and Scottish Executive Council. 2006. *Well-being and Quality of Life: The Benefits of Culture and Sport: A Literature Review and Think Piece*. Scottish Executive Council: Edinburgh.

There is a realisation that job creation in the gallery system and other art businesses could be used as a motivation to include the visual arts in future IPAP planning²².

The findings in this section on the economic dimensions of the sector support the view that more systematic connection to the mandates and programmes of the dti should be prioritised. The dti also has responsibility for the development of policy and legislation in the area of intellectual property rights (IPR). In section 5 of this report the significance of the entire area of copyright and IPR to the sector – and particularly to visual artists – is explored in greater detail.

The Departments of Basic and Higher Education, and associated agencies such as the Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority, also have an important role to play in the development of the sector – both in the supply of new talent into the industry through the schooling and tertiary education system, and in the development of the existing skills base in the industry. The deployment of the visual arts as an integral and value-adding component within an holistic formative education is also critical to the development of a new generation of visually literate, creative and confident consumers of the visual arts. While there has been some engagement between the national department and the Department of Education around co-ordinating their engagement with the sector in the context of school competitions and artists-in-schools programmes, this has largely been in the context of ad-hoc initiatives which have lacked both the strategic focus and the resources that would enable these interventions to impact at a systemic level within a sustainable framework. This issue is explored in greater detail in section 6 of this report, Education and Training in the Visual Arts.

Other Departments – such as Tourism and International Relations and Cooperation – have been involved in limited and largely ad-hoc ways in the promotion of the sector internationally, engagements which are explored in section 3 of this report, Demand for the Visual Arts.

The overarching mandate and coordinating role of the Department of Arts and Culture in relation to the sector is one which arguably needs to be activated in a more strategic fashion than has been the case to date, both in dialogue with its counterparts at a national level, and those at a provincial and local level. One of the challenges that the Department inevitably faces – and almost certainly a major factor in the historical disconnect between the sector and government - lies in the fragmented nature of the sector, a refrain across the creative industries, but a problem which is particularly pronounced in the visual arts. This is partly a function of the largely commercial nature of the sector, coupled with the overwhelming preponderance of small enterprises and individual producers, the majority of whom experience their relationship with government in largely negative or disassociated terms.

While organised structures do exist in the sector (artist associations and industry organisations), there has been little systematic engagement on the part of these structures either with one another or with government in a manner which speaks coherently to the mandates of government in relation to the public at large. The Department has a key role to play in stimulating and supporting a more structured dialogue around areas of mutual interest and concern.

²² interview Nadia Sujee, Creative Industries, DTI; and DTI. 2010. 2010/11-2012/13 Industrial Policy Action Plan. Pretoria: DTI

At a Provincial Level

Provincial departments are involved in funding the visual arts either directly, or through Provincial Arts Council structures, usually run from within these departments. In most instances, the visual arts have not generally been brought into focus as a priority area for engagement and investment, with the exception of provincial government in Gauteng and the Western Cape, where substantial progress has been made in government-sector relations.

Given the geographical distribution of the sector noted in this report, it is unsurprising that the Gauteng and Western Cape provincial governments have been at the forefront of developing regional creative industries development programmes which have included the visual arts sector within their remit. In Gauteng, this has been driven by the Department of Sports, Arts, Culture and Recreation, and has included the commissioning of three key pieces of policy-related research and strategy development:

- the Creative Industries Development Framework (2006/7)
- the Gauteng Creative Industries Mapping Study (2008)
- a Gauteng City Region Visual Arts Strategy (in development)

The provincial department has also invested in key projects such as the Johannesburg Art Fair, mentorship and professional development programmes for visual artists and other stakeholders, networking events and the development of new market platforms, working in partnership with industry organisations in the region.

In the Western Cape, the visual arts have been included in the planning and budgetary frameworks of the Western Cape Department of Economic Development and Tourism, in the context of its Micro-Economic Development Strategy. Through a partnership with the Western Cape branch of the Visual Arts Network of South Africa, the Department invests in new market platforms for visual artists, networking events and professional development programmes.

In both regions, there is a strong focus on partnership with industry organisations and businesses in the development and realisation of projects and plans related to the visual arts.

At a Local Level

The role of the visual arts in urban development has unsurprisingly largely been driven at a city government level. Most of the activity in this area has taken place in the three major urban centres of Johannesburg, Cape Town and Durban. Activities in this area have included:

- In Cape Town, the Creative Cape Town Strategy of the Cape Town partnership has played a significant role in the conceptualising of creative precincts in the Cape Town CBD and promoting networking, co-operation and joint programming between organisations.
- Johannesburg has also been at the forefront of the large-scale commissioning of public artworks, largely financed through the Johannesburg Development Agency with provincial and local government resources.
- The development of the Art Bank concept in Johannesburg has had a variety of positive effects for particularly new entrants into the market
- In Johannesburg, the development of the Newtown precinct has been driven by the Arts, Culture and Heritage department of the city together with the Johannesburg Development Agency. Low rentals for cultural organisations in the precinct have made it an ideal location for non-profit visual arts and craft organisations involved in

training, professional development and the development of new market platforms. Support has also been given to the largely privately driven development of a specifically visual arts precinct on the east end of the Inner City, centred around the Arts on Main development.

- One of the five primary themes of the Imagine Durban project of the Ethekewini Municipality (in conjunction with the international PLUS network of creative cities) is focused on the promotion of cultural diversity, arts and heritage at a city level. The Imagine Durban plan identifies a range of interventions aimed at developing local cultural industries through providing support for local artists, promoting arts spaces and events and skills development for artists. The plan for Imagine Durban also incorporates the development of cultural precincts and the commissioning of public art, and articulates the roles of different stakeholders from the general public through to government, the private sector and civil society organisations in the arts. A specific intervention in the visual arts realm supported through the initiative has been the Creative Arts Bus, a project of the Visual Arts Network of South Africa and the Performing Arts Network of South Africa.

Section 3

Demand for the Visual Arts

In this section, consideration is given to the nature and scale of demand for the visual arts in South Africa. This demand takes two forms: private consumer demand on the part of individuals, businesses and corporations, and demand from the public sector. The nature and size of the commercial market and the workings of the primary and secondary market are explored in the first part of this section, followed by an examination of public involvement in the market through the acquisitions policies of public art museums and collections, public art commissioning and the Art Bank. The section concludes with a set of recommendations concerned with both stimulating private consumption, as well as enhancing existing public demand.

The section provides an overview of:

- o The Nature of the Market
- o Audiences for the Visual Arts
- o Buyers and Consumers of the Visual Arts
- o The Supply system
- o The Role of Art Publishing and the Media
- o The Export Market and International Promotion
- o The Role of the Public and Corporate Sector Demand
- o Regulatory Issues

3.1 Understanding the Market

The purchasing and selling patterns of dealers, auction houses, public art museums and corporate collections, recognition on the competitions circuit, and the commentary of art critics and writers on the other all exert varying degrees of influence in the assignment of value to the work of particular artists in the contemporary segment of the market. In the 'commercial' segment of the market, value is accrued through more conventional supply and demand dynamics in which artists, dealers and gallerists play a primarily role.

Particularly at the contemporary end of the market, the value of an individual work of contemporary art may have very little obvious relationship with the time and physical materials invested in its production – for the work of established artists these are relatively minor considerations in the assignment of financial value. The assigned value of artworks relies to a significant degree on the accumulation of various kinds of symbolic capital through a set of complex and interlocking relationships between art-producers, institutions, gallerists, dealers, publishers, auction houses, buyers and audiences. Morris Hargreaves and McIntyre¹ refer to this as a process as 'subscription', defined as:

"the mechanism by which art and artists are advocated, critically appraised and endorsed by peers within the sector and through which the ultimate destination for the art is in a national public collection... In a sector that has no formal regulatory mechanism the process of subscription provides legitimisation for artists and their work by signifying the endorsement of their work by informed peers from within the sector."

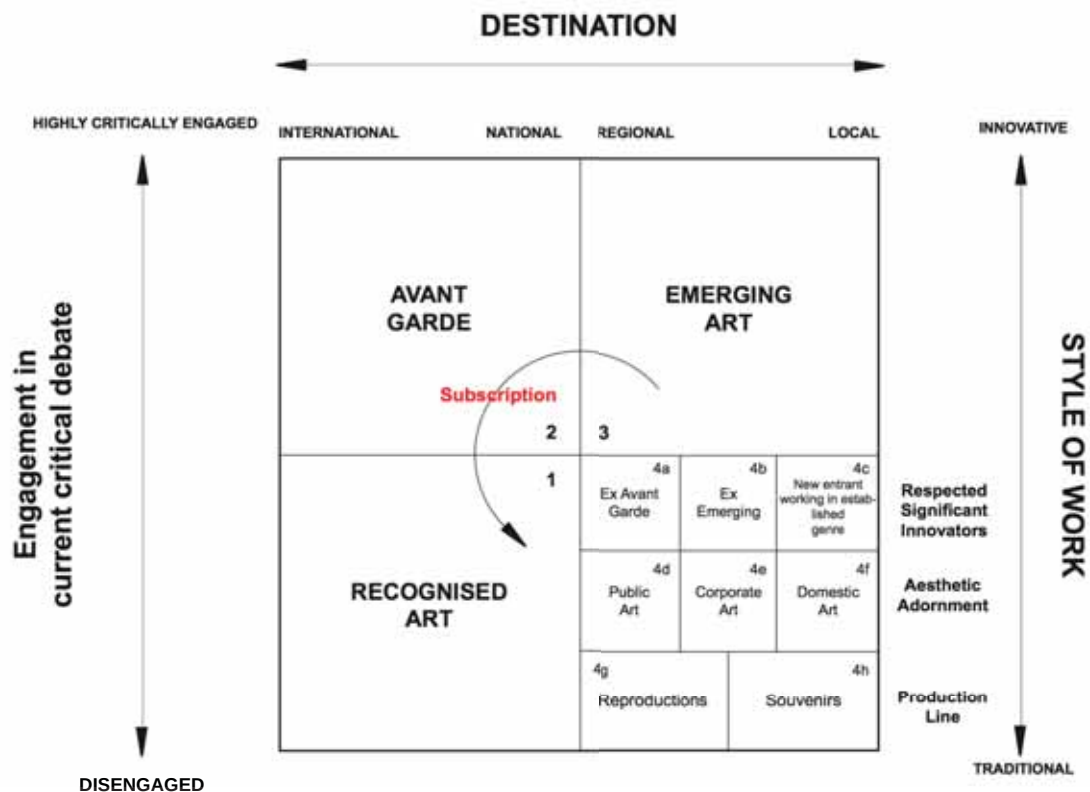
In their analysis of the Contemporary Arts Market in the UK, Morris, Hargreaves and McIntyre (MHM) have developed an 'ecological' model for understanding the visual arts market that is useful in this context. The model helps to explain how value is generated around work situated within different market segments in an industry where supply and demand do not necessarily follow the logic of more conventional market systems.

¹ This subsection draws substantially on the *Taste Buds* study undertaken by Morris Hargreaves and McIntyre into the UK art market.

The model situates artworks, contexts for presentation and sale and buyers within a four-point grid that is organised around three primary axes:

- the geographical scope of markets (from local to international)
- the extent to which work is deemed to be critically engaged
- the extent to which the work utilizes more or less traditional (painting, sculpture) or innovative modes of practice (installation, performance art, etc)

Figure 26: Contemporary Arts Marketplace Model – Morris, Hargreaves, McIntyre (2002)



© Morris Hargreaves McIntyre

The first box, 'recognised art', encompasses the market for the work of a small number of artists who have been validated in both the primary and secondary markets for the visual arts, and who generate substantial individual earnings: the established 'stars' of the contemporary arts circuit. Buyers in this market segment are either (very wealthy) private collectors (many of them internationally based) or international museums and collections, and the supply of work into the market is tightly controlled by a small number of gallerists, dealers and agents. In European and North American contexts, this segment would also include major public art museums and corporate collections as buyers – in the South African context, the limitations on the acquisitions budgets of both public art museums and corporate collections mean that the institutional buyers at this end of the market are to a significant degree located outside of the country.

Box 2, 'avant garde art', encompasses the market where most other contemporary artists aspire to be, and which is normally a pre-requisite for migrating into the 'recognised art' segment: producing work which is regarded as 'cutting edge' within the critical discourse, and beginning to access an international circuit of exhibitions, biennales and art fairs. As

with 'recognised art' the supply of work in this segment is tightly controlled by artists, agents and dealers. Supply of work is tightly controlled by artists, agents and dealers, and buyers can be required to go on a waiting list. As with 'recognised art' entry into this market segment is difficult for both artists and for the dealers, gallerists and curators that nurture the demand for their work – the costs of actively promoting work at this level can be prohibitive for many businesses. In the South African context, this segment is almost indistinguishable from the 'recognised art' segment.

Box 3, 'Emerging Art',

Artists and businesses operating the 'emerging art' segment of the market aspire to be in the avant-garde section. It is the realm in which you new artists reputations are forged (or not) based on their capacity to attract the attention of dealers and gallerists in the avant-garde and recognised segments, and access the contemporary arts circuit at national and regional level. This involves tight control over the supply of work, and the willingness to forfeit short-term financial gain for longer term acceptance into what Morris, Hargreaves/Mcintyre refer to as the "subscription circles". Indeed, there is often substantial resistance to the idea that art should have a market value, and much of the work produced in this segment may not be intended to be sold at all, concerned as it with the accumulation of symbolic capital. And as they point out 'the whole area is about taking risk: artists are risking their reputation; dealers are risking their business and critical commentators are risking their placer in the subscription circles'.

Box 4, 'Most Art' represents the area in which most artists

This segment contains the great majority of art that is bought and sold, and artists, galleries and buyers – "the enormous breadth of production that lies outside the subscription systems", and is substantially less dependant on the institutions and critical discourse that sustains this system. Artists in this segment may have lost favour within the wider critical discourse and elite market, or may never have managed (or tried to) to access this world. Many may in fact have no awareness whatsoever of the concepts which underpin activity in the other three segments. While prices may be modest than in the 'recognised' and 'avant-garde' segment, it also includes many successful artists who are able to make a good living from their work, many of whom operate at the commercial art or 'domestic art' end of the spectrum. Work is often produced with a very particular market in mind and dealers/gallerists in this segment of the market may – because they know their market well and are not burdened with the same constraints with regard to limiting supply of work or identifying new markets - may buy up or 'order' significant quantities of work in advance rather than taking this work on consignment. More often than not, the primary market for this work is at a local or regional level, though some dealers may export this work to very specific suppliers elsewhere in the world which occupy a similar position in the marketplace. At the commercial end of the spectrum, commercial relationships between producers and suppliers can more closely resemble those found in the craft industry. Box 4 is also the segment which is usually the first port of call for first time buyers of visual art, and may represent in a point of entry into the 'contemporary, cutting edge' – but still affordable - world of box 2.

The MHM marketplace model draws attention to some peculiar features of the market for the visual arts:

- It is one of the few industries in which there are significant barriers to entry into the marketplace for *both* producers and *consumers*. The top end of the market is an exclusive and excluding domain for artists, suppliers and buyers/collectors.

- The top end of the market is characterised by quite rigid business practices operating within a relatively closed and highly idiosyncratic market. The end of the market that is characterized by more traditional, local and less critically engaged work is ironically the segment in which the most innovation occurs at the level of business practice.
- The ‘pursuit of critical approval’ at the contemporary, cutting edge of the market has the potential to retard capacity for market expansion and entrepreneurial development

These trends are less pronounced in the South African context, where the ‘avant-garde’ and ‘recognised’ segments are substantially smaller than in the UK, and the great majority of work and commerce occurs in the ‘Most Art’ segment. The MHM study notes the remarkable impediments that are placed in the way of people buying innovative contemporary art by virtue of the manner in which the marketplace operates, and promotes an approach to market development characterised by more imaginative and entrepreneurial consideration of some of the following factors:

- Accessible locations
- An openness and willingness to mentor new buyers
- The cultivation of a greater variety of buyers at different levels of the market
- A willingness to collaborate with other businesses
- Engaging in the provision of other services as a means to supplement core income from sales
- Avoiding a narrow focus on international markets as the destination of most meaning, and the need for active and thoughtful engagement with local and regional markets

3.2 Audiences

The experience of the visual arts is different to other art forms in that consumption can involve a very minimal – or no - economic transaction as artworks can be viewed in a variety of contexts at very little or no cost, in contrast to, for example, the theatre or music industry. The cost of owning an original artwork is however generally far higher than the cost of attending a theatre performance, buying a CD, or going to a concert. The great majority of consumers of the visual arts fall into the category of audiences who appreciate artworks in the context of private or public museums, collections or galleries.

A dramatically smaller number of consumers actually purchase original artworks in the context of commercial galleries, and a minute proportion of the overall population falls into the category of serious buyers or collectors – people who purchase artworks on a regular basis for the purposes of investment, pleasure, social status and so on. Nevertheless, buyers of the visual arts are necessarily grown from audiences for the visual arts and it follows that the larger the audience base for the visual arts, the larger the consumption base will be.

In this sense, the investment in publicly accessible art museums and collections can be understood as an investment in the cultivation of potential buyers of the visual arts. Attendance figures for museums and collections are therefore an important indicator both for understanding the impact of or return on this investment, and for understanding the potential buying market for the visual arts in South Africa, as these figures are likely to capture a significant proportion of those who are interested in the visual arts generally.

The following table shows information on attendance at publicly accessible art museums and collections in South Africa based on a survey of 27 public and private museums and collections across the country (see appended report on museums and collections for more detail).

Table 14: Attendance figures at Art Museums and Collections (2008/9)

	Number of Institutions reporting	Reported total number of visitors (2009)	Average number of visitors	Extrapolated to total population
Public Institutions	9	529 411	58 823	1 058 814
University-based Institutions	6	51 707	8 617	103 404
Private Institutions	3	19 621	6 540	91 560
Total	18	600 739	33 374	1 253 778

Roughly a quarter of the 1,25 million visitors to public art museums and collections were reported to be international tourists across the sample, leaving a total domestic audience for museums and collections of approximately 930 000 people per annum, including school tours and outreach programmes – approximately 2% of the total population. By comparison, a 2002 study of the visual arts in Australia reports between 20 and 22% of the *adult* population attending galleries and museums². A study on the visual arts in America reported that 43% of all adults had attended visual arts events or galleries in 2002³.

The following shows a selection of international comparators referencing the annual attendance figures of individual institutions or institutional clusters:

Table 15: Attendance Figures: International Comparators (2008/9)

International comparator	Annual attendance
Tate Modern	5 million
National Gallery of Australia (Canberra)	501 484
Museum for the Contemporary Arts (Mozambique)	5 631

The BASA ArtsTrack 2009 research report indicates a substantially more positive diagnosis for arts appreciation in South Africa, based on a survey of the adult arts market for the arts. Survey findings suggest that:

- 39% of black respondents attend art exhibitions, on average 2.6 times per year
- 45% of white respondents attend art exhibitions, on average 2.7 times per year
- 34% of asian/coloured respondents attend art exhibitions, on average 3 times per year
- 3.18 million adult South Africans are 'extremely interested' in the visual arts with 2.4 million of these being black South Africans⁴.

The contrast between the attendance figures for publicly accessible art museums and collections and the ArtsTrack data suggests a set of possibilities that require additional research in order to gain a better understanding of audiences for the visual arts in South Africa:

- ArtsTrack respondents overstate their levels of interest in the visual arts

² Department of Communications, Information Technology and the Arts. 2002. Report of the Contemporary Visual Arts and Crafts Inquiry. Commonwealth of Australia: Canberra. P. 165

³ the 2002 Survey of Public Participation in the Arts produced by the National Endowment for the Arts, quoted in McCarthy, K. Ondaatje, E. Brooks, A & Szanto, A. 2005. *A Portrait of the Visual Arts: Meeting the Challenges of a New Era*. Rand Corporation: California. P22

⁴ BMI-Sport Info/BASA. 2009. ArtsTrack 2009. BASA, Johannesburg. pp 13-19.

- 'attending exhibitions' is an inadequately defined activity in the ArtTrack methodology
- 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

Another useful indicator for understanding the audience base for the contemporary segment of the visual arts are visitor numbers at the Joburg Art Fair, which was launched in 2008 and is now in its 3rd year. Driven by the company Art Logic and sponsored by First National Bank, attendance at the Art fair has grown from 6 500 in 2008 to 10 000 in 2010 with 22 and 23 commercial exhibitors respectively⁵ - during the course of three days, the event secured 20% of the entire annual attendance the Johannesburg Art Gallery reported in 2009. Art Amsterdam, a mid-range and established international Art Fair in its 26th year, had 135 galleries participating and reported 24 000 visitors in 2009⁶. Locally, and in an overlapping industry with a substantially larger consumption base, the 2010 edition of the internationally acclaimed Design Indaba featured 287 exhibitors and 35 000 visitors. The more locally and commercially oriented Decorex interior design trade fair exhibition, now in its 17th year, boasts figures of approximately 100 000 per annum across three annual events in Johannesburg, Cape Town and Durban. The April 2010 Cape Town Decorex exhibition reported figures of 35 200 and had 340 local and international exhibitors⁷. The results achieved by the Joburg Art Fair as a very young market platform are remarkable in this comparative context and indicative of a growing market for the contemporary segment of the visual arts in South Africa. They are also indicative of a significantly higher visitor number/exhibitor ratio – 435:1 for the Joburg Art Fair versus 104:1 for Decorex Cape Town, 122:1 for the Design Indaba and 178:1 for Art Amsterdam.

3.3 Buyers

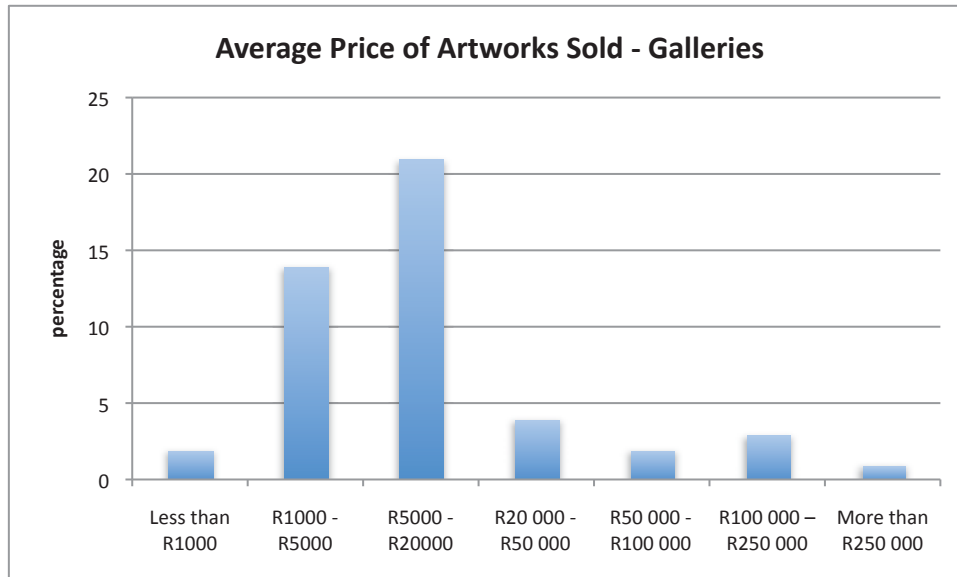
Within the scope of the present project, it was not possible to conduct a detailed profiling of buyers. Both commercial and non-commercial galleries, as well as artists, were however asked about the income levels of their target consumers, and pricing. Most organisations pricing of artworks falls within a R5000 – R20 000 price range with a higher proportion of artists reporting selling work in the R1000 – R5000 range as shown in the following charts:

⁵ Figures supplied by Art Logic

⁶ information accessed at <http://www.artamsterdam.nl/aboutthefair.htm>

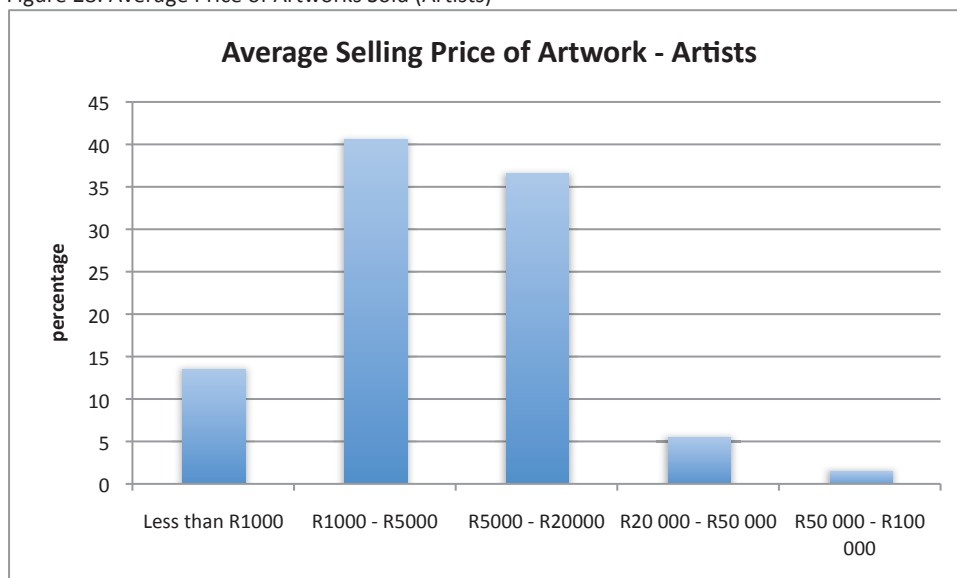
⁷ Press release issued for Decorex Cape Town by Erieda du Toit PR, accessed at <http://www.decorex.co.za/sitefiles/comprr/Post%20show%20release.doc>

Figure 27: Average Price of Artworks Sold (Galleries)



n=47

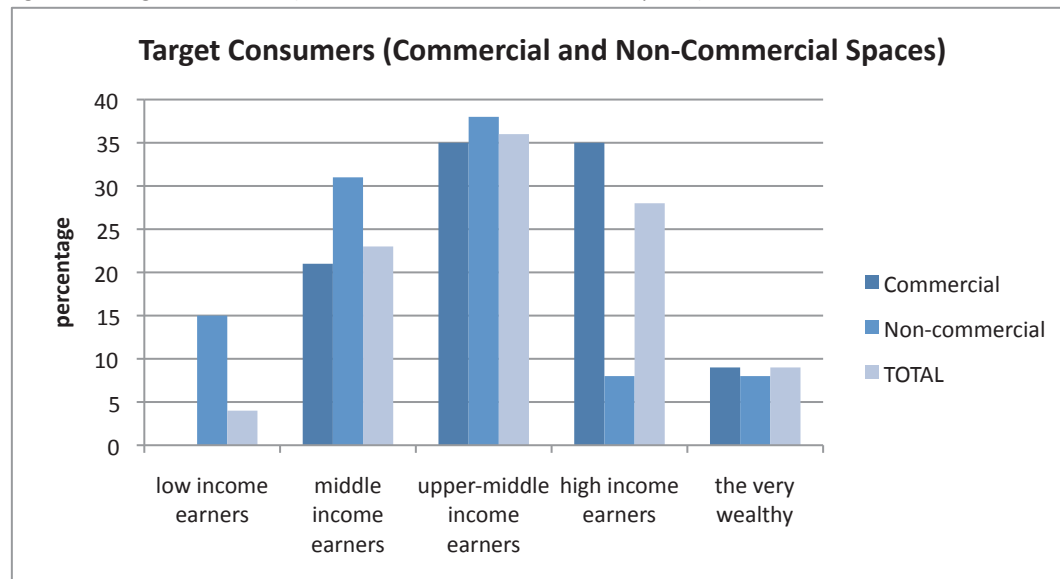
Figure 28: Average Price of Artworks Sold (Artists)



n= 241

Unsurprisingly, the majority of galleries report predominantly upper-middle income and high-income earners, with a small portion of galleries primarily targeting the very wealthy, and a larger proportion of non-commercial spaces targeting middle and upper-middle income earners:

Figure 29: Target Consumers (Commercial and non-Commercial Spaces)



n=47

Market demand for the visual arts within the national and regional economy – though probably stronger than anywhere else on the continent – is therefore confined to a comparatively small economic elite. Middle and upper middle-income earners represent a more numerous section of this market – though 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. Again, sales at the Joburg Art Fair are a good barometer of the impact of shifts in the wider economy on the art market. The value of gallery sales was estimated at R15 million for the 2010 edition of the 4-day Art Fair, excluding sales that took place post the Art Fair – almost half of the pre-recession sales of between R25 and R30 million for the 2008 edition of the Fair⁸.

Consultations with gallerists suggest that there may be a significant new emerging market for the visual arts among the growing black economic upper middle income group within the country – a perception broadly borne out by the BASA ArtsTrack figures referenced above.

⁸ personal communication, Matthew McClure (Art Logic), June 2010

3.4 The Size of the South African Market for the Visual Arts

The buying market for the visual arts in 2008/9 – excluding auction sales - is estimated at just over R1 billion across all market segments (contemporary, 'commercial', etc). This figure was arrived at in the following way:

Gallery Turnover:

- revenue generated from total artwork sales and associated services was recorded as R62 991 998 by 29 entities involved in the distribution and presentation of the visual arts – galleries, project spaces, consultancies and dealers
- the mean/average value for revenue generated through artwork sales and associated services was R2 249 714 per entity
- the median (midpoint) value for sale of artworks and associated services was R484 472
- in order to moderate the effect of a skew within the sample toward contemporary art galleries with a high turnover, a mid-point between the mean and median values for artworks sales/services per entity was proposed: R1 367 093
- Based on the database research for this project, the total number of galleries, dealers, web-based sales portals and consultancies in South Africa involved in the presentation and sale of artwork is estimated at 632 individual entities
- The total turnover from artwork sales for these entities is therefore estimated at **R864 002 798**
- This result can be triangulated against figures reported by artists for sales through galleries.
- The average/mean value of sales through galleries was reported by artists as R58 594 per annum.
- Taking into account that these figures reflect income after gallery commission has been deducted, the total average value of sales can be extrapolated as R97 657 for artists selling their work through galleries
- Based on the database research for this project, it is estimated that there are approximately 5 500 practicing professional artists in the country.
- Based on these assumptions, the turnover through galleries may be estimated at **R537 111 490** per annum. Bearing in mind that galleries and dealers also generate significant revenue from the resale of artwork (with no revenue accruing to the artist), this figure seems comparable to the estimate achieved through the analysis of data from galleries and dealers.

Turnover associated with direct sales from artist studios and artist studio/galleries:

- Artists were asked to quantify sales through galleries as well as direct private sales
- 62% of the sampled artists reported income through private sales and 25% reported income through private commissions
- The mean value for direct private sales reported by artists was R34 618 per annum and R43 401 for private commissions
- Total turnover through direct (non-gallery) sales and private commissions is therefore estimated as **R119 903 698** and **R59 182 500** respectively, giving a total of **R179 086 198**

Total Turnover

- The sum of gallery sales and artist private sales is therefore estimated at **R1 045 525 309** (the sum of gallery sales and artist private sales/commissions).

While the sample sizes for both business entities are low in relation to the total population, triangulating the sales reported by artists through galleries and gallery turnover suggests that these figures are probably in broadly the right range.

The total figure excludes sales through auction houses in South Africa, which are informally estimated by industry sources as being in the region of R260 million per annum at a conservative estimate – partly due to the very small number of entities operating in this market, there is substantial sensitivity around the release of data on income and expenditure from auction houses. This has precluded a precise audit of this important section of the market in the context of this research project. Sales through the Joburg Art Fair were also excluded from this estimate due to the fact that these duplicate sales data for galleries.

To place these figures into an international perspective:

- In the UK, the market for contemporary art alone was estimated at between £354 million/R3.9 billion and £500 million/R5.5 billion in 2004⁹. The value of UK auction sales across all segments was estimated at approximately \$1 billion/R9.3 billion for 2004 – 26,9% of global auction sales in that year¹⁰.
- In Australia, sales through galleries were valued at A\$218 million in 2002, and auction sales at A\$70 million¹¹.

3.5 The Supply System

As the preceding figures make clear, there are three primary vehicles for the marketing, presentation and sale of artworks: the gallery system, the auction market and the promotional and selling activities of artists themselves. These are supported by a range of other platforms that connect artists and buyers: trade events and biennales, competitions and awards, and the activities of a variety of businesses and consultancies. In what follows, a variety of market-related issues pertaining to each of these vehicles are explored.

Artists as Entrepreneurs

Artists may be privately commissioned to produce work, sell work directly from their studios, through on-line platforms, and small studio-based galleries for their own work as well as the work of other artists – the latter is particularly the case for artists operating at the so-called ‘commercial’ end of the market. As noted in the preceding section, these private sales account for a substantial portion (approximately 17%, excluding the value of auction sales) of the overall value of turnover. Artists’ position in and perception of the market, and the nature of their relationships with gallerists and dealers are discussed in greater detail in section 5 of this report, “The Position of Artists”.

The Gallery System

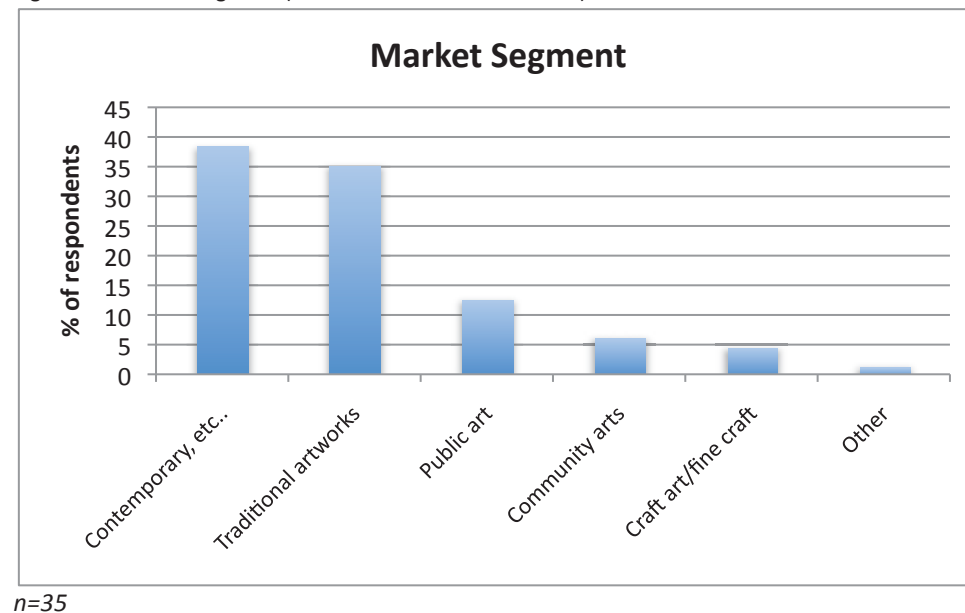
⁹ Morris, Hargreaves and McIntyre. 2004. *Taste Buds - How to cultivate the art market*. Arts Council England publication, accessed at <http://www.takingpartinthearts.com/content.php?content=1034>; Buck. L. 2004. *Market Matters: The Dynamics of the Contemporary Arts Market*. Arts Council England: London

¹⁰ Art Price. 2004. *2004 Art Market Trends*. Artprice.com SA: France. Pp. 6-12

¹¹ Department of Communications, Information Technology and the Arts. 2002. *Report of the Contemporary Visual Arts and Crafts Inquiry*. Commonwealth of Australia: Canberra. P. 239

Database research, drawing on the South African Art Information Directory, suggests that there are in the region of 650 entities that describe themselves as galleries. It is estimated that approximately 75-100 of these operate primarily at the 'contemporary art' end of the spectrum described in the preceding section. The findings from the survey largely address the position of galleries operating in the contemporary market, or perceiving themselves to be doing so. Responses to the survey indicated the following spread across different market segments for organisations involved in the sale and distribution of artworks, with nearly 70% of all respondents indicating that they operate at the contemporary segment of the market:

Figure 30: Market Segment (Presentation and Distribution)



The gallery system is largely composed of commercial entities, with a small number of independent non-profit contemporary arts spaces and artist run initiatives, whose contribution in economic terms is small, but which nevertheless play an important role in the identification of new talent and the setting of trends in the market. These are discussed in greater detail in Chapter 4 'The Organisational Landscape for the Visual Arts'.

As previously noted, the survey sample was skewed toward non-profit organisations, with 11% of businesses whose primary function is the sale of artworks and related services (35 entities) indicating a non-profit trust as a legal structure; and 27% of all organisations (47 entities) who have a gallery space being non-profit organisations – though for more than half of this sub-group the presentation and sale of work is a secondary business activity.

Galleries generally operate both in the primary (first sale) market as well as dealing in artworks in the secondary (subsequent sale) market. Artists usually lodge their work with galleries on a consignment basis in the context of solo or group exhibitions – i.e. galleries act as agents for the sale of work that is still owned by the artist, and receive a commission on the sale of work. 41% of organisations that have a gallery space that were included in the survey (this includes organisations for whom this may be a secondary activity) reported charging commission of between 30 and 40%; 15% reported charging commissions of between 20 and 30% and 11% reported charging commission of between 40% and 50%. Findings from the survey of artists, as well as anecdotal evidence, suggests that the business relationships between artists and gallerists and dealers are seldom reduced to writing, and are often based on inadequately articulated parameters – this issue is addressed in more detail in section 5 of this report, "The Position of Artists".

Gallerists also frequently purchase the work of artists that they represent through exhibitions as well as through studio sales and the open market, and subsequently sell this work in the secondary market (usually at an appreciated value), where the entire value of the sale is retained by the gallerist/dealer. In other national contexts, Artist Resale Rights legislation is in place which (theoretically) obliges gallerists and dealers to pay a small percentage of the value of secondary sales to the artist, so that artists continue to have a share in the increased value of their work over time. This arrangement does not presently pertain in the South African context, and this issue is also discussed in further detail in section 5, “The Position of Artists”.

Key general findings from the survey pertaining to galleries include:

- 34% (12/35) of entities involved in the primary and secondary markets are owned/managed by women; 91% (32/35) of entities are owned/managed by white people
- most of the surveyed galleries are closed corporations (46% or 16/35), followed by PTY (ltd) structures (17%) and trusts (11%); 20% of the surveyed galleries are run without a formal company structure in place (sole proprietorships)
- 51% (18/35) of surveyed galleries have been in existence for between 1 and 5 years; 31% for 6-10 years; 11% for 11 to 20 years and only 6% for more than 20 years
- 43% (15/35) of surveyed entities have to pursue activities outside of the visual arts to supplement their earnings
- 77% (27/35) sell directly to consumers, the balance sell artwork directly to consumers and other businesses in equal measure.

The survey also included a set of questions for all organisations utilising a gallery space, which included some education and training and development organisations. Responses were disaggregated based on whether the entity was a commercial or non-commercial (eg trust, section 21 company) entity. Key findings from this component of the survey included:

- 74% of all entities lease the space that they do business in – this was true for 80% of non-profit entities and 71% of commercial entities
- Commercial entities generally pay slightly more for the space that they occupy than non-profit entities. The mean and median (mid-point) values for monthly costs and cost per square metre for gallery space are indicated in the two tables below:

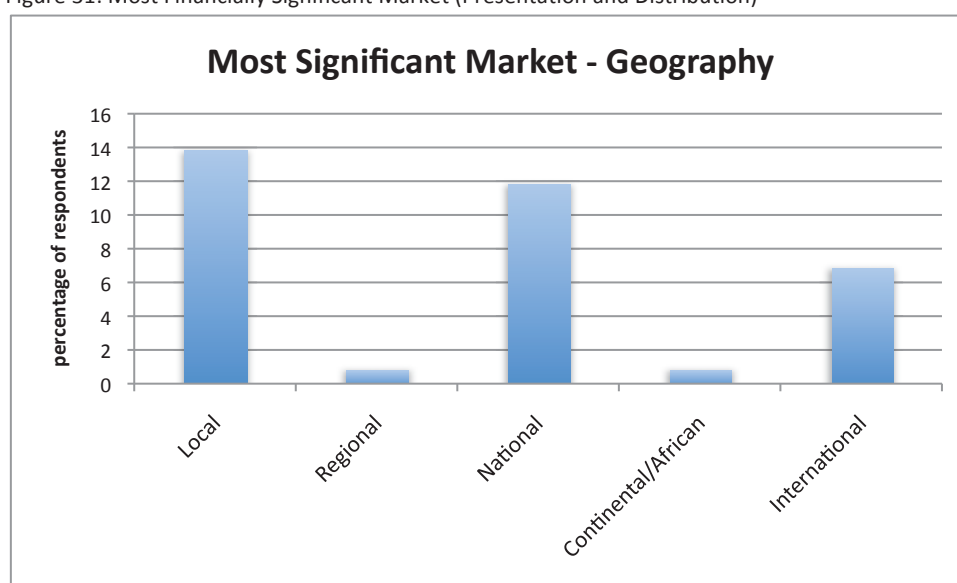
Per month	Commercial	Non-commercial	Overall
N	23	8	31
Mean	R12,403	R10,441	R11,897
median	R7,000	R6,750	R7,000
min	R750	R384	R384
max	R50,965	R33,000	R50,965

Per m ²	Commercial	Non-commercial	Overall
N	23	8	31
mean	R114	R101	R111
median	R63	R79	R66
min	R5	R1	R1
max	R378	R367	R378

- The large discrepancy between mean and median values can be attributed to the existence of a small number of galleries at the top end of the market that pay a premium for the space that they occupy (note maximum values) – this is reinforced by the significance attached to physical location in attracting consumers noted in the findings below.
- Entities with gallery spaces indicate that the great majority (84%) of artworks are sourced from local artists, 21% from artists from the rest of Africa, and 14% from artists elsewhere in the world.

For the majority of surveyed galleries and dealers, the most significant market for their products and services is local (40% or 14/35 of surveyed galleries). 1 in 5 indicated international markets as being of greatest significance, with a large proportion (43%) indicating international markets as being their second most financially significant market. Only 1 respondent to the survey indicated the rest of Africa as a significant target market.

Figure 31: Most Financially Significant Market (Presentation and Distribution)



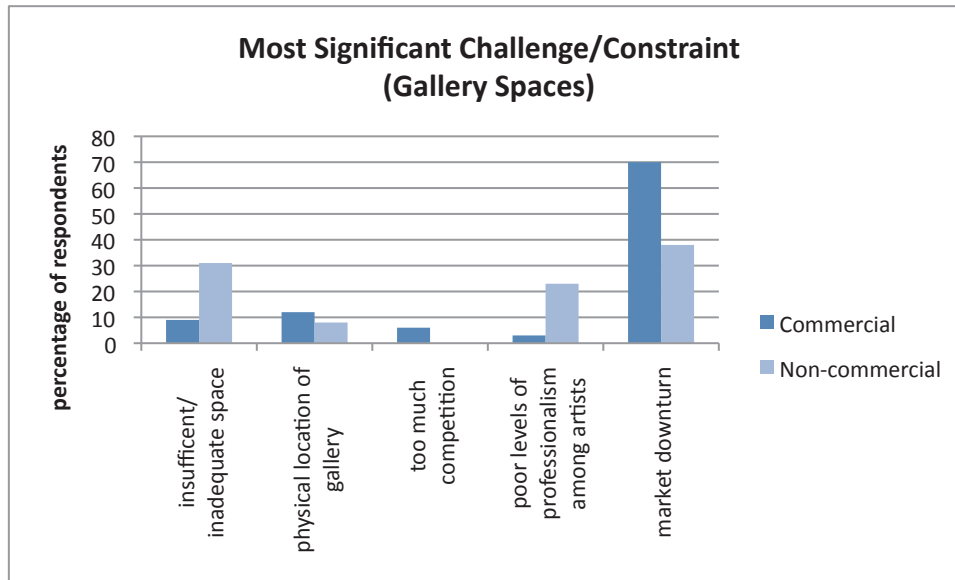
n= 35

- Just less than half of respondents - 49% (17/35) - indicated tourists as being a significant target market.
- 43% (20/47) of organisations with a gallery space reported exhibition openings as being the most important opportunity for making sales; with 28% reporting casual daytime sales and 21% reporting special viewings as being the most important context for making sales.
- The majority (46% or 16/35) regarded networking and word of mouth as being the most important method of marketing their products and services, with the physical position of the business and on-line presence also featuring as significant primary methods of marketing work (both being indicated by 18% of the respondents)
- An on-line presence and digital communication was indicated as being the most significant secondary method of marketing work by the great majority of respondents (48,5%), with a further 14% noting the importance of local media as a secondary method
- The majority of respondents were positive about growth in the market for their products and services, with 57% indicating 'gradual improvement' and 27% indicating 'healthy' growth in the market. 8% perceived the market to be stagnant,

and only 6% and 3% of respondents perceived the market to be 'in decline' or 'sharp decline' respectively.

- 'Poor levels of professionalism among artists' is the most frequently cited constraint or challenge for commercial galleries (29%), followed by issues associated with their physical location (26%) and a downturn in the market (19%). Interestingly, the small group of non-commercial spaces surveyed cited a downturn in the market as being their most significant constraint or challenge (55% of respondents), followed by the physical location of their gallery (36%)

Figure 32: Most Significant Challenge/Constraint (Commercial vs non-Commercial Spaces)



n=46

The Auction Market

Auction houses represent an important, and growing part of the market for the sale of visual art in South Africa. The majority of sales through auction houses are secondary/resales of artworks that have already circulated in the market, potentially changing hands a number of times. The auctions market for visual arts is predicated on appreciation in the value of work over time, based on the complex set of factors involved in the endorsement of particular artists in the marketplace, through institutions and through art critical discourse, journalism and scholarship. Auction houses generate their revenue through charging a buyers premium (added to the value of the work, usually on a sliding scale) and a seller's commission (subtracted from the value of the work). They generally operate at the top end of the market, largely dealing in the work of artists whose reputations have been established and command high prices. In advanced economies with a substantial base of serious collectors and buyers, auctions account for a major portion of the total value of artwork sales. In 2004, for example, the value of the auction market in the UK had almost twice that of sales through galleries, dealers and artists (roughly R9.4 billion vs R5.4 billion – see preceding section for data sources). The global market was valued at \$5 billion in 2009, down from a decade high of \$9.4 billion¹².

The international market is dominated by two multinational auction houses – Sothebys and Christies - which in 2009 together accounted for 59% of the value of all auction sales internationally, though only just under 11% of all auction lots sold among all significant

¹² Art Price. 2009. 2009 *Art Market Trends*. Artprice.com SA: France. p. 6

auction houses¹³. Sales are generally organised by historical period (Old Masters, 19th Century, Post War, Modern and Contemporary) and by medium (painting, sculpture, drawings, prints, etc.). Internationally, the art auction market saw massive growth during the post World War II period, and from the 1960s a signal trend has been the growth in the value of modern and contemporary art on the auction market – whereas the value of sales in these segments were previously modest by comparison with Old Masters, the last few decades have seen prices for contemporary art rivaling those of the established art-historical canon of artists. The market for contemporary art is also the most volatile of the market segments – for example, after a boom in art prices at auctions between 2002 and 2008 (rising by 225%, according to the annual Art Price Index Trends publication), the market value of contemporary art has now returned to 2004 levels, and in the space of a single year lost 6% of the overall market share of auctions sales¹⁴.

The South African auction market is dominated by three auction houses – Stefan Welz and Co (established in 1968, associated with Sothebys), Graham Britz (launched in 2001) and Strauss and Co (launched in 2008). There are a number of smaller auction houses that have a fine arts specialism, such as Bernardi Bros, 5th Avenue Auctioneers and Ashbeys. The London-based Bonhams is the only major auction house outside of the country that specialises in South African art. With the general opening up of the economy in the post-apartheid period, the domestic auction market in South Africa has gone through a boom period during the last decade with rapidly escalating prices for particularly nineteenth century and early modernist South African art. The total value of auction sales (including buyer's premium) through auction houses was estimated as being in the region of R260 million for 2009¹⁵.

There are a variety of regulatory issues that apply in reality and in prospect to the activities of auction houses:

- the South African Heritage Resource Agency (SAHRA) regulates the export of items of national heritage significance in terms of the provisions of the National Heritage Resources Bill 139 of 1998. The Bill makes provision for SAHRA to control the export of items that may be deemed to form part of the national estate, a provision which has had some impact on the ability of foreign-based buyers to remove artworks from the country.
- Sellers of artworks through auction houses do not presently pay Capital Gains Tax on the value of works sold – which can run into millions of rands
- The implications of the newly promulgated Consumer Protection Act have yet to be fully understood in relation to the activities of auction houses

As previously noted, the major intervention in this area – contemplated in the Berne Convention (to which South Africa is a signatory) – is the institution of Artist Resale Rights, legislation which would compel auction houses (and potentially all dealers operating in the secondary market) to distribute a small percentage of the value of the sale of artworks to the originating artist, or in certain instances (such as is the case in Norway), to an Artists fund. The institution of such legislation in most other national contexts has been met with much resistance from auction houses. Substantial consultation with all players in the secondary market – supported by research on approaches to implementation - would need

¹³ Art Price. 2009. 2009 *Art Market Trends*. Artprice.com SA: France. p. 14

¹⁴ Art Price. 2009. 2009 *Art Market Trends*. Artprice.com SA: France. p. 8; Art Price. 2008. 2008 *Art Market Trends*. Artprice.com SA: France. Pp. 7

¹⁵ Michael Coulson. 2010. *The 2009 Auction Year in Review*. SA Art Times November 2009/January 2010 edition. p1.

to precede any intervention in this realm. Such an intervention would also need to be balanced against demonstrable investment by government in other areas of the industry. This issue is addressed in substantially more detail in section 5, 'The Position of Artists'.

National, Regional and Local Marketing Platforms: Art Fairs, Biennales and other Trade events

Art Fairs and Biennales represent the two main internationally established formats for the showcasing of the contemporary visual arts. Art Fairs, have an overtly commercial character, functioning as trade shows for the visual arts which attract both domestic and international exhibitors. Biennales, by contrast, are curated exhibitions involving the participation of artists and curators from a variety of national contexts, usually in the context of national pavilions/exhibits. Though they are overtly more engaged in the construction of art-critical discourse than in selling, in so doing they also play an influencing role in the market in developing the reputations of particular artists and curators.

As previously noted, the Joburg Art Fair has provided an important new platform for the cultivation of new audiences and buyers for work largely at the contemporary end of the spectrum. Its success has arguably been predicated on a combination of factors:

- The development of a trade fair format which includes lifestyle elements such as contemporary design,
- an aggressive marketing strategy across print, on-line and outdoor media
- the positioning of the Fair in a location (the Sandton Convention Centre) which is accessible and familiar to upper middle income South Africans and international visitors
- The development of a financial model based on the selling of tiered branding rights, together with complementary investment from the Gauteng provincial government, and a variety of local and international contemporary art institutions and agencies.

15% of all artists responding to the survey cited the Johannesburg Art Fair as being the most significant sector development initiative. Interestingly, among black artists, the Art Fair was most frequently cited as the most significant initiative (19% of all black respondents).

Biennale-type events have had a more checkered history in the South African context. The Johannesburg Biennales of 1995 and 1997 – supported by a combination of local, national and international funding - failed to develop a sustainable financial model, political buy-in or a local audience base. The project also attracted criticism on the basis of its perceived dislocation from the everyday concerns of contemporary South Africa. The Cape Africa Project, developed with support from the Airports Company of South Africa, was founded in 2003 and was developed as a platform for experimental work from across Africa, engaging with new audiences in new venues and contexts around Cape Town, with a conference being convened every second year as the basis for the development of the concept for the next iteration of the project. Focused on new and experimental work, and heavily reliant on funding from the National Lottery Distribution Trust Fund, the project finally collapsed in late 2009 under the weight of a range of funding, governance and management problems.

At the 'commercial arts' end of the market, local markets and festivals play an unquantified but significant role in providing a platform for decorative and domestic art to be sold at modest prices. 16% of all artists participating in the survey cited local markets and festivals as being the most significant sector development initiative (the third most commonly cited type of initiative after competitions and artist-run project/exhibition spaces). Many of these projects have an open-air character – such as Artists under the Sun at Zoo Lake in Johannesburg and the Walk of Art Festival in De Waal Park in Cape Town – and some occur

in the context of more general clusters for arts and craft presentation and retail such as the Midlands Meander in Kwazulu-Natal and local fairs and markets in small 'artist towns' in the Western Cape and the Free State. Visual arts and crafts exhibitions and markets also form a minor part of the offer of some of the national and regional arts and music festivals, such as the Klein Karoo Kunstefees, Oppikoppi, Macufe and the like.

Consultancies and other service providers

A small number of consultancies also play an important role in the development of new opportunities and areas of demand in the industry. Largely run by artists and curators with entrepreneurial talent, these companies have identified and addressed important gaps in the market – for example, around the management of the commissioning of public art, the use of art in corporate branding contexts, deploying art in marketing and advertising and so on – and in so doing have created substantial work and creative opportunities for artists, technical service providers and curators working in the industry. Virtually all of these entities are located in Johannesburg. Some key examples include:

- Art Logic (Johannesburg) – a private company responsible for the development and management of the Johannesburg Art Fair
- Trinity Session (Johannesburg) – a partnership between two artists involved in the commissioning of public art, corporate branding projects and creative industries research
- Propertuity - the development company responsible for the Arts on Main and Mainstreetlife precinct development on the east end of the inner city of Johannesburg
- Art at Work (Johannesburg) – a partnership between an arts manager and a gallerist, largely concerned with managing public art commissions for both public sector and corporate clients.
- Akani Creative Consulting (Johannesburg) – a consultancy involved in the curation of exhibition projects, new gallery ventures and corporate art consulting
- Biecc (Johannesburg) – a specialist technical services production company for exhibitions and projects, which also manages August House, a redeveloped industrial building in the inner city of Johannesburg which provides low cost live-work and production space for artists and other creative professionals
- ArtSource and ArtSpace – a consultancy and linked commercial gallery involved in the provision of professional development and support services for artists through workshops and seminars and a mentorship programme for young artists.
- A Word of Art (Cape Town) - a young management agency for artists, designers, illustrators that blurs the lines between art and advertising – also generating significant projects that have a social entrepreneurship dimension.

Competitions and Awards

Competitions and awards play an important role in making the sector as a whole visible to a wider public, shaping the reputations of visual artists and making available finance for the development of new work. 19% of all artists participating in the survey felt that competitions and awards play the most significant role in the development of the sector. Though this was the most frequently cited initiative among artists, it was also the issue with that registered the greatest disparity on the basis of race, with only 8% of black artists taking this view as compared to 27% of white artists.

The limited number of competitions and awards for the visual arts that operate at a national level are almost entirely sustained through corporate sponsorship. The South African

National Association of the Visual Arts (SANAVA) and its various affiliates have played a key role in developing, managing and promoting a variety of competitions together with corporate sponsors. Recently, Spier Contemporary has established itself as the most financially significant art competition in the country, in the wake of the demise of the Brett Kebble Art Awards (valued at R630 000 in 2005). The only publicly financed art competition of any significance is the Thami Mnye Art Awards competition, sponsored by the City of Ekurhuleni.

Competitions and awards include:

Table 16: Art Competitions: Value and Sponsors (2009/10)

Competition/Award	Total value	Principal Sponsor/Sector Partner
Spier Contemporary	R600 000 + residencies	Spier Holdings/Africa Arts Centre
Standard Bank Young Artist Award (Visual Arts)	Not known	Standard Bank
Absa L'Atelier Art Competition	R230 000 + return flight to Paris for winner	ABSA/SANAVA
MTN new contemporaries	R50 000 + budgets for the development of new work for four participants	MTN
Sasol New Signatures	R100 000	Sasol/Pretoria Arts Association
Carrol Boyes Competition	R90 000	Carrol Boyes
The PPC Young Concrete Sculptor Awards	R85 000	PPC Cement/Pretoria Arts Association
Thami Mnye Art Awards	R70 000	City of Ekurhuleni
Vuleka Art Competition	R25 000 + return flight to Paris for winner	Sanlam/Arts Association of Belville

3.6 Reception - The Role of Art Publishing and the Media

Art writing and publishing play a vital role in the development of the industry – on the one hand they promote the visibility of the industry, cultivating new audiences and markets, and on the other play an important developmental role in providing feedback to artists, curators and gallerists on their work. In a general way they foster new thinking, new perspectives and critical debate, and contribute to building a coherent sense of 'an industry' that can be presented to a wider public and debated by a more specialist audience of academics, buyers and collectors. Publishing and art writing takes a number of different forms which each yield particular impacts on a number of levels:

Catalogues and project specific publications serve as a visual record of a particular body of work, and usually involve the commissioning or contribution of a critical perspective on the body of work by one or more art writers or critics. They serve both a documentary function and provide points of access for specialist and non-specialist audiences alike, exploring the ideas underpinning artworks and providing contextual information that can facilitate interpretation and understanding. In this sense they contribute both to the discourse around contemporary arts, as well representing as a crucial archival record of work that can be used for teaching, learning and research purposes within schools, at a tertiary level, and by curators and writers. This is particularly true of catalogues associated with work that is ephemeral in nature, an increasing trend in the production of contemporary art. These

documents also act as an important promotional tool for artists and curators for future projects, and enhance the marketability of particular exhibitions of work, lending authority and 'subscription value' to these projects.

A commonplace in the European and North American arts scene, they are however expensive to produce, and the capacity to finance these publications is largely limited to a handful of the top galleries in the country. The great majority of artists and gallerists in South Africa are not generally in a position to afford even a brochure associated with a particular exhibition project.

Books and Monographs on particular artists or art-related topics are usually developed in response to the work of more established artists, significant projects, or a particular issue that has gained currency. Due to the specialist nature of the market for such books, they are generally of little interest to mainstream publishers, and rely on niche publishers who are able to give exclusive focus to cultivating networks of buyers of such publications, and/or attracting funding to address the substantial production and/or distribution costs associated with such publications. In the South African context, the two most significant publishers of such books have been David Krut and Bell-Roberts publishing, often working in partnership with gallerists and funders on particular projects.

The Taxi Art Books series of artist monographs produced by David Krut represents an innovative example of a publishing project which was enabled through subsidy from a variety of local (National Arts Council and Arts and Culture Trust) and international funding (Pro Helvetia, the French Institute and the Royal Netherlands Embassy), with substantial resources invested by the publisher. The project was able to attract such support partly through the inclusion of educational supplements aimed at high school learners.

The availability of funding for such publications has however been minimal in the South African context - such projects are generally difficult to sustain on a purely commercial basis, and often rely on the investment of substantial personal resources, often at cost and risk to the publisher. Bell-Roberts Publishing has for example diversified its publishing offer into the more commercially viable lifestyle market on the one hand, and into on-line publishing on the other.

Art journals, magazines and websites provide a forum for the exposure of artists work to both specialist and non-specialist audiences, both locally and internationally, and the communication of industry news and the fostering of critical inquiry and debate. They are small in number by international standards (a 2002 Australian report notes the existence of 20 specialist publications) and generally receive no subsidy from the state. The principal publications, mostly located in Cape Town, include:

- o *Art Throb*, probably the longest surviving on-line platform for news and reviews on contemporary art
- o *Art South Africa*, *Snapped* and *Itch*, all quarterly journals/magazines produced by Bell Roberts Publishing through a combination of print and on-line media
- o *The South African Art Times*, a monthly print and on-line publication produced by Global Art Information, which has produced two spin-off publications – *Business Art* and *Art Life*
- o *Chimurenga*, an occasional journal and on-line platform that focuses on multi-disciplinary creative projects
- o *Art South Africa Initiative (ASAI)* is an on-line publishing project that serves as a forum for critical debate, a historical archive of South African art, as well as hosting

- an on-line edition of *Third Text Africa*, a critical journal on the contemporary visual arts in Africa
- o *A Look Away*, a quarterly print magazine published by BK Publishing

Printed magazines and journals are confronted with similar challenges to book publication in the sector due to the small size of the market and the absence of subsidy from the state. All rely on somewhat different models for sustaining their output. At one end of the spectrum, The South African Art Times relies to a significant degree on advertising sales in order to be viable, and has developed *Art Life* as a lifestyle publication with a broader reach. At the other end of the spectrum, *Chimurenga*, relies primarily on sales and some external funding (from the Africa Centre) in order to sustain an independent and critical voice that has a pan-African reach. *A Look Away* is sustained through sales and cross-subsidy from mass-produced low cost publications targeted at youth. The *Art South Africa Initiative* is sustained largely through individual investments of time and energy and external funding. The development of on-line platforms and on-line equivalents of print publications, where additional content can be generated and distributed at minimal cost, has been crucial to the sustainability of many art critical platforms.

3.7 The Export Market and International Promotion

Quantitative information on the export of visual arts is difficult to accurately determine, and fell outside of the scope of the present survey, beyond the canvassing of gallerists and dealers on their engagement with international markets (reflected above). International trade data from secondary sources suggests that South Africa's significant profile in the field of contemporary visual artists is not matched by volume of exports. The 2007/8 Creative Economy report produced by UNCTAD (the United Nations Conference on Trade and Development) breaks down trade data for the different creative industries sub-sectors in both the developed and the developing world. UNCTAD reports that the total value of world exports in the visual arts sub-sector (which includes antiques within their definition) has grown from \$10 billion in 1995 to \$22 billion in 2005 (reflecting a phenomenal 8% annual growth during this period), with developing and transitional economies accounting for 30% of this trade (UNCTAD 2008:108) in 2005. However, most of the growth in the developing economies share is accounted for by Asian economies, principally China and India. In the latter group, South Africa features on only one set of indicators for visual arts exports – for 'other visual arts' – and is ranked 6th among developing economies, accounting for \$16 million worth of exports. By contrast, China (including Hong Kong) accounts for \$4.3 billion worth of exports, 19.4% of world visual arts exports¹⁶.

In the case of both Art Fairs and Biennales, very few South African galleries are in a position to show the work of artists in these contexts due to the high costs involved, and it is very difficult for artists to self-finance participation in these platforms. Participation usually depends on financed invitations extended by international contemporary art organisations, institutions and commercial galleries. In a variety of other national contexts, the public sector has a variety of tailor-made support measures aimed at promoting the international exposure of artists through these platforms. While the national department has supported South African participation in the Venice Architecture Biennale, no systematic support for the international exposure of South African visual artists has been forthcoming from any level of government.

¹⁶ UNCTAD. 2008. The Creative Economy Report. The Challenge of Assessing the Creative Economy: Toward Informed Policy-Making. UNCTAD: Geneva. pp. 123-4 & 260-292

dti Incentives and the Visual Arts

While the Department of Trade and Industry (dti) has several generic industry incentive schemes related to the promotion of exports that could be accessed to assist galleries in taking work to Art Fairs, these rarely been accessed by the visual arts industry. A number of schemes managed through the dti division, Trade and Investment South Africa (TISA) could notionally be made available to artists and galleries insofar as they fall within the category of 'entrepreneurs':

- The Export Marketing and Investment Assistance (EMIA), which is a scheme to partially compensate exporters for costs incurred in respect of activities aimed at developing export markets for South African products and services. The scheme makes provision for individual participation, such as exhibitions and in-store promotion, primary market research, as well as for participation in national pavilions and individual exhibitions. Artists/galleries would be required to pay for costs upfront and then claim back a percentage of costs afterwards. There are a variety of other criteria that also need to be fulfilled to qualify for this rebate.
- The Emerging Exporters Programme, which requires artists/groups/organisations to register as an organisation or through a state department
- Sector Specific Assistance Scheme (SSAS). The purpose of the Sector Specific Assistance Scheme (SSAS) is to enable the funding of non-profit industry organisations in sectors and sub-sectors of industry prioritised by the dti, in respect of both generic funding and project funding provided that the purpose of the organisation and/or its proposed project aims to conform to the dti's export strategy.

Customs and Excise Duties

Exporting artworks does not generally cause problems at the point of origin. Export of artworks for sale, not returning, does not involve custom duties. The exporter of temporary exhibitions is required to submit full documentation of the artworks at the point of departure. Problems do however occur when or if the work returns. Customs units physically check all artworks in their warehouses, and it can take up to 10 days before the artworks are released. Storage conditions are not amenable for artworks, and storage fees can be charged if an argument delays the process¹⁷.

Department of Home Affairs

The Department of Home Affairs (DoHA) regulates all incoming visitors. Artists and art dealers wanting to visit the country for business purposes, can obtain a 90 days permit, which can be extended once with a further 90 days. Foreign artists/dealers can do professional work during this period. It is more difficult to obtain a work permit. Various categories exist of people who are eligible for a work permit. The focus is on scarce skills, and artists are not viewed as such. Another option is the category of 'extraordinary skills', e.g. cultural specialists or academics.

Art consultancies which want to initiate a business in South Africa have to invest at least R2,5 million in assets and employ at least five SA residents. The option also exists to open a branch and second international personnel. Individual foreign persons wanting to open a business in SA are required to have R7.5 million investments/assets and need a chartered accountant statement as verification. Vacancies in SA must be first advertised and filled

¹⁷ interview Eugene Botha of Fineartlogistics

locally. If no suitable person can be found, foreign persons can be appointed. This rule can be waived in exceptional circumstances.

3.8 The Role of the Public and Corporate Sector in Demand

The role of government in the financing of the arts is often reduced to that of providing subsidy – to institutions, organisations and individual artists. Government can however also play a significant role in the marketplace, in two broad ways:

- o as a direct client
- o through instituting measures aimed at stimulating wider consumption of the visual arts

The most common types of public sector involvement in the market place occur in six areas, with varying degrees of immediacy in their impact on the industry:

- o the acquisition of artworks through museums and collections, where government institution plays a role as a buyer of artwork
- o the commissioning of public art where government acts as client in order to fulfill a public policy mandate in another area (urban development/regeneration),
- o Percent for Art schemes involve government instituting policy which encourages or obligates investment on the part of others, usually in public art commissioning in the context of construction/property development.
- o support provided to the development of cultural precincts and clusters where investment plays an indirect role in stimulating consumption through the development of environments which attract target consumers
- o the Art Bank Concept involves a combination of these two roles – government purchasing artworks, and actively promoting the purchase of the same artworks by third parties
- o Zero interest purchase schemes or tax incentives associated with the purchase of artworks, encouraging the cultivation of new buyers and collectors of the visual arts through enabling access to interest free credit or tax breaks on the purchase of art.

Many of these involve varying degrees of partnership or relationship with the corporate sector in their implementation, and the extent to which these areas have been developed in the South African context are briefly assessed in what follows:

Acquisitions Programmes of Art Museums and Collections

Museums and Collections play an important role in acquiring work directly from artists and through gallerists and dealers. Their purchasing of new work not only yields immediate economic benefit, but also serves to endorse that work, affecting the value of work in both the primary and secondary commercial market. These direct and indirect positive impacts are however contingent on there being a significant capacity for new acquisitions among museums and collections in the country.

Research commissioned into the acquisitions programmes of publicly accessible South African museums and collections shows that the capacity for new acquisitions is poor. A significant proportion of the value of new acquisitions now arises from works that are donated to institutions. The acquisitions capacity of corporate collections is almost certainly substantially under-estimated in this data as it is based on a very limited sample of corporate collections, and within that sample only a small number of collections were prepared to divulge information about their acquisitions budgets). Nevertheless, compared to the acquisitions capacity of comparator institutions internationally, these figures are

incredibly low - the national gallery of Australia in Canberra, for example, recorded circa R71,4 million worth of acquisitions in its 2008/9 annual report.

Table 17: Acquisitions Budgets for Public and Private Museums and Collections

	Number of Institutions reporting	Reported total acquisitions budget	Average acquisitions budget	Estimated total no of institutions	Extrapolated to Population
Public Institutions	9	2055000	228333	18	4 109 994
University-based Institutions	7	1995000	285000	11	3 135 000
Private Institutions	3	460000	153334	14	2 146 676
Total	19	4510000	237368	43	R9 391 670

A number of commentators have noted the extent to which the value of particular artists work is now determined in large part through the commercial market, and the decline in the role of public museums and collections in this regard. Based on these budgets, public museums and collections also have little or no ability, for example, to bid on significant examples of South African art in either domestic or international art auctions. One of the few public institutions which has a significant capacity for new acquisitions is the Johannesburg Art Gallery, enabled through the establishment of a modest, privately financed endowment for this purpose. This approach has however been the exception rather than the rule in the South African context, with corporate entities prioritising the establishment of their own collections and exhibition capacity over investment in public museums and collections – part of an overall dilution of available resources discussed in more detail in Section 4 of this report, The Organisational Landscape for the Visual Arts.

The Commissioning of Public Art

Johannesburg has been at the forefront of commissioning of public art, from through both the public and corporate sector. More than R14 million has been invested in over 200 individual artworks in the inner city alone during the course of the past ten years, generating work and income for more than 250 artists. The bulk of these interventions have been financed through the Johannesburg Development Agency operating within an inner city regeneration mandate, and deploying a combination of local and provincial government finance, usually in the context of wider area and precinct development plans. The corporate sector has also played a significant role – both the JHB Art City and Cell C Art in the City projects of the early 2000s involved significant corporate investment¹⁸. The Sunday Times Heritage Project, a project with national scope, has also played an important role in building the case for the commissioning of public art. The City of Cape Town, the Ethekwin Metro and the Nelson Mandela Bay Metro have all also been involved in the procurement of public art programmes of varying scale over the last two years, much of it linked to the 2010 Soccer World Cup.

Johannesburg has also pioneered the development of a Percent for Art policy relating to the commissioning of public art, particularly in relation to the regeneration of the inner city. The Public Art Policy, introduced in 2006, makes provision for up to 1% of the budgets of all major city building projects to be invested in the commissioning of public art. Though this provision functions more as an encouragement than as an obligation (as it does in other parts of the world), the policy has played a role in unlocking substantial investment from

¹⁸ Urbaninc. 2010. Public Art Manual for the Inner City of Johannesburg. Unpublished document commissioned by the Johannesburg Development Agency.

local and provincial government, though the buy in of the corporate sector has to date been limited.

The Art Bank

Following the cue provided by the White Paper for Arts, Culture and Heritage, the national Department conducted some preliminary investigation in the early 2000s regarding the feasibility of establishing an Art Bank agency in the South African context. The Art Bank concept has been instituted in a variety of international contexts (for example, in Australia, Canada, the UK). Art Banks are developed as institutions that play a role both in supporting emergent talent (through the purchase of work) and in stimulating consumption (through the loan of work and provision of curatorial services to government departments and corporate clients). These ideas were subsequently taken up by the City of Johannesburg, leading to the establishment of the Joburg Art Bank in June 2006 as a non-profit Trust financed by the City. Initially viewed with some trepidation by galleries (on the basis that it would be competing in the low to mid range market), during the 2006-8 period the Art Bank acquired nearly 1200 artworks from over 240 artists, valued at R3,5 million. After a couple of years of relatively successful operation, the future of the Joburg Art Bank is subject to some uncertainty, and the Joburg Art Bank is currently without a budget for further acquisitions. It would appear that unrealistic expectations were developed around the Art Bank business model, with a view that it would be self-sufficient within a 3-5 year period, leading to a cessation of further investment beyond the provision of a skeleton staff on the part of the City after this period had expired. By comparison, the Australian equivalent, established in 1980, took 12 years to generate a surplus.

The National Arts Council is presently in discussions with the City of Johannesburg around the possibility of developing this agency as a national project, and a submission has apparently also been made to the Minister of Arts and Culture and the Office of the Director General within the national department in this regard¹⁹. The potential for such an agency to play a positive and developmental role in the market through cultivating new audiences and consumers has been demonstrated in a variety of other contexts.

Interest Free Loans For Art Purchasing

A variety of schemes exist internationally for enabling people who would not normally be able to buy artwork to do so, through the institution of interest free loan schemes. This both stimulates consumption and can play a role in nurturing a new generation of buyers and collectors. These schemes generally exclude established buyers and collectors and eligibility is usually determined through consideration of the income of the applicant. The *Own Art* established by the Arts Council of England in 2004 is operated through a wholly owned subsidiary company, Artco Pty Ltd. Work purchased through the scheme (limited to loans under £2,000) is paid for in 10 monthly, interest-free installments. As of 2009 the scheme has made over 14,500 loans to purchase art valued in excess of £11.6 million. The company also plays a wider role in educating entry-level buyers and collectors about the market and buying practices. The Mondriaan Foundation in the Netherlands has developed a similar scheme which it implements in the context of Art Amsterdam (an Art Fair), in collaboration with a financing institution. The Collect Art Purchase Scheme instituted by the Australian state of Tasmania in 2008 enables loans from the state for the purchase of Tasmanian artworks valued at between A\$400 and A\$10,000.

Art for Embassies and Missions

¹⁹ personal communication, Steven Sack, 13/4/2010; Department of Arts and Culture. Annual Report 2008/9. p.60

Within the Department of International Relations and Cooperation (DIRCO), the Marketing Directorate plays a role in the promotion of South African artists internationally. One small component in DIRCO that affects visual artists is the Interior Design sub-directorate which is responsible for acquiring art works for South African embassies and missions. Artworks are acquired for all public formal spaces in such buildings. Although DIRCO follows the normal state Supply Chain Management procedures, it allows artists, consultants and galleries to be registered as preferred service providers, and to present their works to the art committee at the department. Acquisitions are determined by the available budget (for new buildings) and the selection by the art committee, which includes an art consultant. Acquisitions for existing buildings are done on an ad-hoc basis through the art committee.²⁰

²⁰ interview with Sibongile Qangule, Department of International Relations and Cooperation 9/03/10

Section 4

The Organisational Landscape for the Visual Arts

In this section, the organisational infrastructure that supports and sustains the visual arts is discussed in greater detail. While the role of the commercial gallery infrastructure in the support and promotion of the work of visual artists is addressed in Section 3 of this report (The Market for the Visual Arts), this section is largely concerned with an assessment of the position of the variety of institutions and organisations that support the development of the visual arts outside of a commercial framework.

Consideration is given to the current position of both the public and private organisations concerned with the development of the visual arts in various ways. Four key types of organisation are examined:

- o Art museums and collections (public and private)
- o Independent Contemporary Arts Organisations
- o Artist Associations and Industry Organisations
- o Community Arts Centres

4.1 Art Museums and Collections

In South Africa, the majority of the core public infrastructure for the visual arts was developed in the first half of the twentieth century. In contrast to the experience in the United States, where aspirant industrial wealth invested massively – and continues to invest under a friendly tax dispensation – in the development and sustaining of the most extensive public infrastructure for the appreciation of the visual arts in the world, very little of the substantial industrial money in the South African economy was historically invested in similar infrastructure. While, for example, the South African mining magnates were significant collectors of art, as Michael Stevenson has noted, very little of this work was bequeathed to public art museums – the majority of the Randlords having a primary identification and allegiance with Europe/England, where much of this artwork was subsequently repatriated. The absence of a culture of arts-related philanthropy in South Africa – and a public policy and tax framework to promote such philanthropy – has sustained a pattern of underinvestment in the public art museums and collections, with corporations preferring to establish their own collections in the context of self-contained strategies for corporate branding and promotion. Sustained partnerships between the corporate sector and public infrastructure for the arts have, as a consequence, become the exception rather than the rule. Among those instances noted by Stevenson are Standard Bank's support for the collection of African art housed at the University of the Witwatersrand and the Anglo American Johannesburg Centenary Trust, "established in 1986 to provide the Johannesburg Art Gallery with funds for acquisitions, which has ensured that it is virtually the only gallery in South Africa with an active acquisitions programme, and indeed the only museum in the country with a significant endowment fund"¹.

Similarly, public sector underinvestment is not a new phenomenon, but rather one which has a rich pedigree that has been sustained into the present. As Stefan Hundt notes, in 1980, the then director of the South African National Gallery, Raymund van Niekerk, preferred not to report the actual acquisitions budget of the National Gallery (R30 000 at the time), preferring to note a nil amount in the belief that this conferred "a bleak dignity which would be destroyed if I told them what the amount really was".²

¹ Stevenson, M. 2002. *Art and Aspiration: The Randlords of South Africa and their Collections*. Fernwood Press. pp. 174-180.

² Hundt, S. 2009. "Public and Private: Collecting and Exhibiting in an Environment of Cultural Indifference". Paper presented at the First Conference on Management of Cultural Organisations in times of economic crisis, Cape Town, 3-4 Dec. 2009. pp9-10.

As a result, the post 1994 government inherited responsibility for a substantial number of art museums and collections which on the one hand largely represented the art history, interests and needs of the minority white population in their collections, built form and location; had meager existing resources and few independent or private revenue streams.

The White Paper notes that the bulk of this infrastructure was located in the major urban centres, largely inaccessible to the majority of the population living in townships and the rural homelands established by the apartheid state. The policy response to this problem has been two-fold:

- to develop new community arts infrastructure across the country that would complement this existing infrastructure (see sub-section below on community arts centres)
- to simultaneously seek to rationalise and transform the existing institutional infrastructure: on the one hand aligning the activities of museums and collections more closely to public policy goals through for example education and outreach programmes, and making them more accessible to a wider public, and on the other making them more effective and efficient in their use of resources

The White Paper also noted the need for a review of which institutions should be designated as national institutions, supported by the Department:

“The Declared Cultural Institutions are 'national' in the sense that they are budgeted for by the Department because of ad hoc decisions made in the past, but they are not all of 'national' status in terms of their collections or the services they provide. Indeed, several provincial and municipal museums are more 'national' in this respect than some of the nationally funded institutions.”

In the event, the department amalgamated a significant number of institutions under two groups centred around Gauteng (‘the Northern Flagship’ group recently renamed ‘Ditsong Museums of South Africa’) and the Western Cape (the Southern Flagship, subsequently renamed ‘Iziko’), as well as a number of individual institutions spread across the rest of the country. These were declared as Cultural Institutions under the Cultural Institutions Act 119 of 1998. Four new national heritage institutions were added to this group during the course of the late 1990s and early 2000s - the Robben Island Museum, Freedom Park (Pretoria), the Nelson Mandela Museum (Umtata) and the Luthuli Museum (KZN). Funding allocated to national museums and collections between 2005/6 and 2008/9 was as follows:

Table 18: DAC Annual Transfers to National Museums and Collections³				
	2005/6	2006/7	2007/8	2008/9
Amount (R)	276 305 000	333 254 000	275 702 000	431 476 000

It is estimated that between 5 and 10% of these annual transfers are invested specifically in art museums and art collections, principally:

- the Iziko/South African National Gallery and associated art collections (Cape Town)
- William Humphreys Art Gallery (Kimberley)
- Oliewenhuis Museum (Bloemfontein)

³ Figures are from the 05/06, 07/08 and 08/09 DAC annual reports, accessed at www.dac.gov.za. The substantial year-on-year fluctuations are a function of annual variations in investment in the realisation of the Freedom Park project, ranging between R58 million (2005/6) and R194 million (2008/9).

- the Engelenburg House Collection (Pretoria)

In addition to these nationally designated institutions, a significant number of municipal art museums and collections are financed and directly managed by local government. These include:

Gauteng

- the Johannesburg Art Gallery (City of Johannesburg)
- the Pretoria Art Museum (City of Tshwane)
- the Springs Art Gallery (West Rand Municipality)
- the Ekurhuleni Art Museum (Ekurhuleni Metro)

Kwazulu Natal

- the Durban Art Gallery (Ethekweni Metro)
- the Tatham Gallery (Pietermaritzburg)
- the Newcastle Gallery (Newcastle)
- the Margate Gallery (Margate)

Eastern Cape

- the Nelson Mandela Bay Art Museum (Nelson Mandela Bay Metro)
- the Anne Bryant Gallery (Buffalo City Metro)

Limpopo

- the Polokwane Art Museum (Polokwane)

Western Cape

- Somerset East Museum/Walter Battiss Art Gallery (Somerset East)

It is estimated that local government currently invests in the region of R50 million per year in the maintenance, staffing and programming of these institutions.

In addition, most of the major universities have significant art collections and galleries. These are financed through a combination of internal and external sources, including private donations and overall institutional subsidies received from the National Department for Higher Education – the latter accounting for the major part of the funding that supports the overall institutional infrastructure of universities.

The current position of these institutions – and the position of corporate collections - is addressed in detail in the appended report on museums and collections. High-level findings include the following:

Funding

South African Public art museums and collections are dramatically underfunded by comparison with other countries with a developed museums and collections infrastructure. By comparison with other African countries, museums and collections in South Africa are however comparatively well-resourced. The following table indicates comparative levels of resourcing (and some key associated indicators) between a selection of South African government institutions (both national and local) and institutions in Australia, the UK, Mozambique and Zambia.

Table 19: Key Data for Public Museums and Collections (National and International)

	Income/budget (2008/9)	Staff	Acquisitions– 2008/9 Rand Value	Attendance	No of Exhibitions
Tate group - UK ⁴	R2.45 billion	1300	R1,1 billion	7.5 million	50
National Gallery of Australia, Canberra ⁵	R415 million	314	R71,4 million	500 000	11
Museu Nacional de Arte - Mozambique	R1,4 million	13	not known	5631	5
National Museums Board of Zambia ⁶	R15 million	119	0	120 000	
SANG/Iziko ⁷	R60 million (Iziko)/ R8-10 million (SANG/art collections estimate)	245 (Iziko)	R700 000	500 000 (Iziko)/ 42 583 (SANG)	26
William Humphreys Art Gallery	R4 million	17	R830 000	not known	14
Johannesburg Art Gallery	R7,4 million	29	not known	50 000	
Pretoria Art Museum	R7,9 million	11	R3,4 million	11 800	7
Durban Art Gallery	Not known	13	R250 000	200 000	20
Tatham Art Gallery	R3 million	16	R140 000	41 860	10

⁴ Data reflects four galleries that form the Tate group – Tate Modern, Tate Britain, Tate Liverpool, Tate St Ives. Information obtained from the Tate Museums Annual Report for 2008/9

⁵ information obtained from National Gallery of Australia Annual Report 2008/9

⁶ This data reflects information related to 4 institutions managed through the National Museums Board of Zambia

⁷ this data reflects information both for the whole Iziko group (which includes 11 other non-art museums alongside the South African National Gallery), as well as (where available) data for the SANG as one institution within this group that presides over the art collections component of the group as a whole. Some of the SANG/Iziko data was extracted from the institution's 2008/9 annual report, other data was obtained through the museums and collections survey conducted as part of this research project

The manner in which income is generated is also instructive. The Tate earns 75% of its income from earned income and donations, a significant portion of this generated through Tate Enterprises Limited, a wholly owned subsidiary company that produces and retails Tate merchandise. South African public institutions lean far more heavily on the public sector for their revenue – the majority rely on an annual grant from the state (either national or local government) for more than 90% of their overall income, with a very small number (for example, Iziko) generating up to 30% of overall income from admissions, venue hiring and externally raised funds and sponsorships (though it is unclear how much of this is directly associated with the Iziko art collections and the South African National Gallery) – a similar level of earned income to the Australian National Gallery.

Local government institutions report that the bureaucratic context that they operate in places severe constraints on their capacity to generate earned income, as theoretically any earned income goes into a general municipal pool, not back into the institution. Some institutions, such as the Johannesburg Art Gallery have to some degree addressed these constraints through the nurturing of an active Friends society which raises and receives money for specific projects on behalf of the institution, and through having a privately run Trust that contributes substantially to the institution's acquisitions budget.

It is also notable that corporate and private sources are most commonly reported as sources of supplementary income to core government grants, with the NLDTF and the National Arts Council substantially less likely to be reported as source of additional income. The NLDTF in particular – due to the scale of funding available, should however be a major source of future income for these institutions.

Acquisitions

As noted in the previous section, accurate figures on the acquisitions capacity of art museums and collections has been difficult to determine, particularly in the case of corporate collections. What the data does reliably indicate is that the acquisitions capacity of public museums and collections is extremely low by any standard, and much of the value of new acquisitions by these institutions is derived from work that has been donated. While the data suggests that public museums and collections have more substantial acquisitions budgets than those of corporate collections, it seems likely that in fact these institutions are unable to acquire new artworks at anything close to the rate or volume at which the major corporate collection and private institutions are currently doing – a rate or volume which is in turn modest by international standards. Corporate collections are therefore responsible for the majority of new acquisitions of artwork in the country. One of the implications of this is that public museums and collections are largely unable to compete for the acquisition of significant historical work by South African artists on the secondary market. The Ifa Lethu Foundation has initiated a programme of voluntary repatriation of artworks from international owners in order to address this issue (particularly in relation to work produced by black South African artists during the liberation struggle). Such a programme is obviously constrained in certain fundamental ways by the fact that work is donated rather than these acquisitions being guided by a vision for the collection supported by significant buying power, so that choices can be made as to what is acquired, and what is not.

Nonetheless, it is important to note that – despite this differential – public museums have continued to acquire new works for their collections, in large part due to both financial support and direct donations of artworks from private individuals.

Collections and Physical Infrastructure

Art museums and collections are guardians of a very large asset base. Publicly owned collections tend to be substantially larger than corporate collections, a function of their longer institutional history, as reflected in the following table⁸:

Table 20: Size of Art Collections: Public and Private Art Museums			
	Number of Institutions reporting	Total Number of Artworks Reported	Average number of works in a Collection
Public Institutions	10	52589	5259
University-based Institutions	8	40436	5055
Private Institutions	6	7180	1197
Total	24	100205	4175

Substantial economic value is locked within these collections, with most institutions able to report on the insured value of collections, as reflected in the following table:

Table 21: Value of Art Collections: Public and Private Art Museums					
	Number of Institutions reporting	Total Value of Artworks Reported	Average value of works in a Collection	Estimated total number of institutions	Estimated total value for full population
Public Institutions	7	R690 399 316	R98 628 474	18	R1 775 312 532
University-based Institutions	7	R328 500 000	R46 928 571	11	R516 214 281
Private Institutions	3	R131 900 000	R43 966 666	14	R615 533 324
Total	17	R1 150 799 316	R67 694 077	43	R2 907 060 137

Both public and private institutions have been able to maintain the physical integrity of their permanent collections and – to a marginally lesser extent – of their physical premises. This contrasts strongly with trends in many other African countries, and can be counted as a significant signifier of these institutions' continuing viability.

Exhibitions

Public museums organise and display significantly more temporary exhibitions than private collections; most of these museums also report producing exhibitions that travel between institutions. This strongly suggests that the sharing of resources between museums has played a significant role in allowing them to continue to show a wide range of exhibitions.

Audience Development

By the international standards of institutions in advanced economies such as those of the UK and Australia with a large middle class population and audience base, attendance figures at South African art museums are low - across 18 public and private institutions total annual figures of just over 600 000 were recorded, with an average of just 59 000 per annum for public institutions). Public museums are nevertheless attracting increasing and reportedly diverse audiences through public events, school tours, and education and outreach programmes. Most respondents report that this success is ongoing – as visitors numbers

⁸ it should be noted that a number of very substantial corporate collections did not respond to the survey – care should be exercised in extrapolating the corporate collection data to the overall population.

continue to increase; most, however, also believe that their audiences can still be further developed. (for more detail on audiences see section 3 of this report).

Outreach

Education and community outreach programmes are currently under-resourced in both public and private institutions; a large number of surveyed institutions also emphasised the necessity of redressing this under-resourcing to enable continuing audience development.

Governance and Management: Demographics

While there has clearly been some change in the demographic profile of the governance and management of art museums and collections, there remain significant challenges in this area. From a sample of fifteen institutions (6 public, 5 university-based and 4 private) that were able to report on this issue, 35% of the people represented on the governance structures of organisations were white women, 31% black men, 21% white men, and only 13% black women. Based on responses from 13 institutions, the senior management of institutions reflect a substantially less transformed profile – 44% white women, 25% white men, 25% black male and 6% black women.

Regulatory Issues impacting on art museums and collections

Problems with import duties are often cited as inhibiting the travelling of international art exhibitions to South Africa. According to the Schedules for the Customs and Excise Act 1964 (amended), import of visual art works is duty free. The problems cited relate to the payment of 10% general duty and 14% VAT on the value of artworks brought into the country for the purposes of temporary exhibition. If the exhibition is temporary, the importer has to pay this amount or provide a bank guarantee when importing the goods, or register a bond with the Customs office. When the exhibition leaves South Africa again, this amount is reimbursed. If any of the artworks have been sold, the duty value is deducted from the reimbursement. It is almost impossible for most public, private or commercial galleries to address the costs of such (temporary) expenditure in relation to work of any significance that is brought into the country for the purposes of presentation. Currently, Customs regulations allow a travelling exhibition to stay for six months. However, according to one respondent in the relocation industry⁹, there is some flexibility, and it is possible to negotiate concessions with senior managers at Customs Office, e.g. in considerably lowering the value of the bank guarantee for the artworks, or extending the duration of the exhibition. There should be room for concessions for national and local municipal museums and collections to be exempted from these regulations.

4.2 Independent Visual Arts Organisations

In the developed visual arts economies of Europe and North America, contemporary art organisations occupy a distinct and important space in the ecology of the art world, providing opportunities for the presentation of new and experimental work within a non-commercial framework, and providing opportunities for (particularly younger) artists to develop new bodies of work and projects through residency programmes and the like. They play a significant research and development role for the sector, incubating and developing new talent and ideas, and often exploring new (non-gallery) contexts for the presentation of the contemporary arts to new audiences. These organisations exist in dynamic relationship both with the market for contemporary arts and with the public and private museums and galleries, exposing new talent that then migrates to these contexts, or providing more established talent with new opportunities for creative growth through residencies, project-

⁹ interview Eugene Botha of Fineartlogistics

based and collaborative work. They also play a significant role in the rethinking of the contemporary arts in society, often within a trans-disciplinary and activist framework.

In developed economies, a variety of models exist for such organisations to receive recurrent funding from government to significantly address their core running costs, providing organisations with a managerial and administrative capacity from which to leverage complementary, project-specific funding.

In South Africa, the number of these organisations is very small by comparison to comparators in Europe, North America and Australasia. Key examples include:

Exhibition, Production and Residency Focus

- o Blank Projects (Cape Town) – project space and international residencies
- o YoungBlackman (Cape Town) – project space
- o Greatmore Studios (Cape Town) – international residency, studio and project space
- o The Bag Factory (Johannesburg) – international residency, studio, workshops and project space, with a particular focus on new media
- o Nirox Foundation (Johannesburg) – residency and project space
- o Joubert Park Project/Keleketla! (Johannesburg) – residency, studio and project space with particular focus on public art and cross-disciplinary work
- o Jozi Art Lab (Johannesburg) – a project space and international residency programme
- o August House (Johannesburg) – studio space facility
- o Goethe on Main (Johannesburg) – project space
- o Co-Op (Johannesburg) – project space
- o Dala (Durban) – public art residencies and projects with an activist focus

All of the above have had to generate a variety of different models for their survival within a funding environment which favours projects that have a more overt and directly measurable social or economic impact than these organisations are generally able to demonstrate, and which does not presently provide the kind of recurrent year-on-year funding that similar organisations in advanced economies are predicated on. For example:

- o The Bag Factory and Greatmore Studios are part of an international network of funded residency spaces which were developed on the basis of a core investment from private (internationally based) philanthropy, supplemented by other local and international funding.
- o August House – a complex of studio and production spaces – operates on a more or less commercial basis, providing low cost studio space to artists in a redeveloped industrial building in the inner city of Johannesburg
- o The Nirox Foundation is able to exist through a combination of external funding and cross-subsidy from projects in the commercial field.
- o The Goethe on Main project space is financed through the Goethe Institute in Johannesburg, a German arts and cultural funding agency for contemporary culture. (see also Section 7: Funding).
- o Organisations such as Public Eye, Dala, the Joubert Park Project and blank projects generally operate on a project-by-project basis, relying on a precarious mix of local and international funding.
- o Co-op is a more commercially driven project space that promotes and showcases collaborative work between contemporary artists and designers

Annual income for the organizations is mostly in the R250 000 – R1,5 million per annum range. They are often heavily reliant on project-based funding in order to address core administrative and overhead costs.

Artist Run Initiatives and Collectives

Contemporary art organisations frequently emerge out of artist-run initiatives – largely self-financed creative projects developed by artists and collectives of artists around a specific project or intervention. Blank, Dala and the Joubert Park Project all had their genesis in artist-run initiatives. These initiatives are often inspired by a building, location or neighbourhood. While an Australian study indicated the existence of 85 artist-run initiatives across the country in 2002, in South Africa, they are again very limited in number.

These are largely self-financed projects operating within informal or very basic organisational structures – some have been able to access limited external funding from government and private sector sources, usually linked to individual participating artists. They are extremely flexible, their membership is generally quite fluid, and they are usually short-lived – though a small number may subsequently develop into contemporary arts organisations as outlined above. Examples include:

- o Public Eye (Cape Town) – public art collective, one of the longest surviving artist-run initiatives in the country
- o 3rd Eye Collective (Durban) – the collective behind the Red Eye project developed in collaboration with the Durban Art Gallery, now defunct (2000-2006)
- o Gugulective (Cape Town) – a collective of young black artists producing experimental work, originally focused round the Cape Town township of Gugulethu, now dispersed around the country and the world
- o MixedTape Collective (Cape Town) – a series of projects developed by Cape Town artists Linda Stupart and Craig Groenewald
- o The Centre for Historical Re-enactments (Johannesburg) – a very recent project developed by curator Gabi Ngcobo
- o Serialworks (Cape Town) – an occasional project space developed by artist Kathryn Smith
- o Joan Do (Cape Town/Johannesburg) – a collaboration between an arts manager, curator and artist concerned with the intersection between art and commerce
- o Parking Space Gallery (Johannesburg – now defunct) – an entirely self-financed project developed by artist Simon Gush, which involved the conversion of a small room in a parking lot in an industrial building in the inner city of Johannesburg into a gallery space showcasing the work of emerging talent.

One of the results of the difficulties of sustaining such organisations in the South African context is that both public museums and collections as well as the commercial sector also play a role in this area. Most of the leading commercial galleries (Goodman, Michael Stevenson and Everard Read) have established project spaces or a project space dimension to their programming. Public museums have developed innovative programmes – such as the Durban Art Gallery's involvement in the Red Eye public art project, the Johannesburg Art Gallery's Nando's Project Room for the exposure of young talent and the South African National Gallery's Soft Serve projects which ran in the late 1990s/early 2000s.

Arts Development Organisations

There are then also a very small group of organisations which have a primary focus around the provision of alternative education and training pathways into the industry for artists

from disadvantaged backgrounds, with a secondary focus on promoting new work. Key examples include:

- o Market Photo Workshop (Johannesburg) – focused around the training of photographers and forms part of the Market Theatre Foundation, receives core finance as a Cultural Institution under the Cultural Institutions Act, and raises complementary project-related funding for fellowships, exchanges and exhibition projects.
- o Artist Proof Studio (Johannesburg) – focused around the training of printmakers and a variety of linked programmes in the visual arts and craft sectors aimed at social and economic development with a national reach; relies on a mix of self-generated, government and corporate funding.
- o Lefika, an Art Therapy project (Johannesburg) – involves the training and provision of therapeutic services to individuals, families and communities affected by abuse, crime, poverty, xenophobia and HIV AIDS.
- o The Imbali Visual Literacy Project and the Curriculum Development Project – two visual arts and crafts education organisations involved in teacher training, craft development projects and local community development projects in and around Johannesburg
- o Art for Humanity (Durban) – an organisation which specialises in producing fine art print portfolios, exhibitions, billboards and research projects that advocate various human rights issues in South Africa and internationally, and is hosted by the Durban University of Technology, and funded through a significant number of local and international funders
- o The BAT Centre is an art development and community centre located within the small Craft Harbour off Durban’s Victoria Embankment. It contains a number of retail outlets, a restaurant, bar and large hall fitted with sound and lighting equipment. There are large art studios, a number of exhibition galleries, music practice rooms, a dance studio, resource center and a conference room.
- o The Spier Arts Academy offers a three year course in architectural mosaic. Students wishing to learn mosaic are sponsored by the Academy for a three-year course comprised of academic tuition, intense practical training, vocational and business guidance. The objective is to train skilled craftsmen as leaders in mosaic and impart an experiential understanding of what it takes to run a sustainable and lucrative enterprise within the industry.
- o Arts and Teaching Initiatives (Port Elizabeth) – a project concerned with the professional development of artists, the provision of in-service arts training for teachers, and the deployment of artists in schools.

Their role in supporting education and training in the visual arts is discussed in greater detail in the Education and Training section of the report.

4.3 Industry Associations, Advocacy and Support Groups

There are a significant number of visual arts associations around the country which have played a valuable role in the general promotion of the industry through the organising of art competitions, membership exhibitions and other projects. These include:

- the South African National Association for the Visual Arts, the oldest arts association in the country, which has 26 regional branches and 19 affiliated organisations around the country. It is a member of the International Association of the Visual Arts

and is responsible directly and through its affiliates for organising most of the major national art competitions together with corporate partners, including the Absa Atelier Award, the Sasol New Signatures Competition, the PPC Young Concrete Sculptor Awards and the Vuleka Art Competition. It is also been involved in a variety of international exchange projects, a residency programme in Paris, as well as member exhibitions and initiatives at a regional level. Its membership includes both professional and amateur artists.

- The Association for the Visual Arts in the Western Cape and the KwaZulu Natal Society of Artists, are both membership-based organisations which run independent gallery spaces in Cape Town and Durban respectively, which provide an important platform for new work in each city outside of the commercial gallery system.
- Ceramics South Africa, which also has affiliates around the country and which runs workshops and stages exhibition for members
- The South African Visual Arts Historians Association (SAVAH) is an association of art writers and historians composed to a large degree of academics from fine arts departments around the country. SAVAH's main activities revolve around the organising of an annual conference for its members.

The capacity of the sector for organised lobbying on policy and legislative issues has historically been weak. Since the consultations around the White Paper on Arts, Culture and Heritage in the mid 1990s through the ACTAG (Arts and Culture Task Group) process, there has been no industry organisation consistently lobbying on behalf of the visual arts sector around policy or legislative issues that may affect the sector.

In the early 2000s, partly in response to the staging of the International Cultural Diversity Network Conference in Cape Town in 2001, a number of individuals and organisations in the sector noted the absence of an umbrella body able to pursue advocacy and lobbying on behalf of the sector, and met to discuss the possibility of forming such an organisation. The Visual Arts Network of South Africa (VANSA) emerged out of these discussions as a body aimed at bringing professional artists and practitioners, organisations and associations together around a set of shared interests, concerns and problems. The organisation launched itself through a Conference convened at the University of Cape Town in 2006 which attracted a significant number of visual arts stakeholders from around the country. The organisation has subsequently positioned itself as a research, development, lobbying and networking organisation and played an important role in promoting the need for the commissioning of the present research project with the national department, and has partnerships in place with provincial government in Gauteng and Western Cape.

4.4 Community Arts Centres

As noted in the previous section, the White Paper envisaged community arts centres playing a central and critical role in the realisation of its broader objectives, particularly those relating to the provision of greater access to arts and culture and the redress of imbalances wrought by the apartheid system:

“The primary need for infrastructure is in rural and black urban areas, close to where people live. The establishment of urban and peri-urban townships as dormitories, without proper facilities for recreation and leisure, is a feature of apartheid. This deprivation cannot be continued in the new dispensation which is concerned with improving the quality of people's lives at a local level. Such

improvement must include the development of facilities to educate, nurture, promote and enable the enjoyment of the arts, film, music, visual art, dance, theatre and literature.... To this end, the Ministry intends to develop the concept of multifunctional, multi-disciplinary community arts centres through a number of pilot projects. Such centres might cater for music, dance, film and theatre, gallery and production, house a library and Internet access, as well as a museum. A national audit of such infrastructure will be undertaken co-operatively by all levels of government to guide future planning and the allocation of resources. This strategic partnership will involve provincial and local arts and culture forums and communities in the determination of needs and plans for the development, governance and maintenance of arts and culture infrastructure."

The national department supports activities related to community arts centres through the Arts and Culture in Society Programme. The Department has sought to play a role in promoting the development and sustainability of a network of community arts across the country, in pursuit of the goal of promoting greater access to arts infrastructure for the majority of South Africans.

The Department's work in this area has included:

- The building and refurbishment of approximately 40 community arts centres across the country in the context of the 1997 Culture in Community (CIC) Programme, financed through the Reconstruction and Development Programme (RDP)
- The commissioning of a national audit of community arts infrastructure and programmes from the Human Sciences Research Council (2000/1)
- Support for the establishment of a Federation of Community Arts Centres (2000-2)
- A bilateral programme with the Flemish government (2003-5) which included:
 - i. The commissioning of a policy framework for community arts centres through a bilateral programme with the Flemish government
 - ii. A 3 year programme of technical assistance to community arts centres in the Free State, Kwazulu Natal and Limpopo aimed at strengthening programming, networks and sources of funding
 - iii. A local cultural policy development project piloted in each of the three provinces aimed at integrating local service delivery in the arts into the plans for local government
 - iv. The development of a manual for community arts managers
- The formation of a National Task Team for Community Arts Centres tasked with the development of a business and strategic plan addressing the needs of community arts centres (2007-ongoing)
- The convening of a National Community Arts Awards Programme (2008-ongoing)
- Direct support to community arts centres across the country

A 2009 database developed by the national Department contains details of 184 community arts centres and projects operating under a variety of management arrangements – municipal/local government centres, provincial government centres, Centres built through the Community in Culture programme (CIC), Multi-Purpose Community Centres established through the Government Communication and Information System unit in the Presidency and independently established centres and projects. The great majority of projects and centres are independently or community initiated projects, and the majority of these are single art form projects in the performing arts with very limited or no physical infrastructure. It is also unclear in many instances the degree to which the listed Multi-Purpose Community Centres have any arts related programmes in place.

Table 22: Community Arts Centres: Provincial Spread by Category

	Local gov	Prov Gov	Gov (other) – eg MPCCs, RDP centres	NGO/community initiated	TOTAL
Western Cape			14	8	22
Gauteng	7		2	10	19
Kwazulu Natal	2		9	27	38
Eastern Cape		15	6	4	25
Free State		1	2	13	16
Mpumalanga	5		1	13	19
Limpopo	2	2	2	15	21
North West		8		10	18
Northern Cape		1	2	3	6
TOTAL	16	27	38	103	184

The realisation of the core vision for community arts centres has been beset by a range of difficulties. These include:

- A general tendency toward over-investment in capital infrastructure and under-investment in the human infrastructure that is required to animate these buildings through arts programming
- Many of the centres that were built were not adequately planned in consultation with local communities and without clear arrangements in place for their ongoing sustainability – a situation which has led to many centres being un- or under-utilised, or being used for other purposes, such as weddings and other community events
- Inadequate funding at all levels of government to support capital infrastructure costs, the core costs of running and maintaining centres and programming costs – this is particularly the case at local government level, which has the greatest constraints on expenditure related to non-essential services
- A shortage of the complex skills-set required to make community arts centres viable entities – in the areas of programme and building management, networking and fundraising.
- Poor levels of connection and integration between community arts infrastructure and government programmes in associated areas such as education, health, correctional services and so on.

The Department also supports complementary interventions aimed at maximizing the social impacts of the arts through the Arts, Social Development and Youth (ASDY) sub-programme of the department. The directorate supports programmes that involve arts practitioners in facilitating arts programmes in a variety of social development settings, including community arts centres, schools, health, the environment and correctional services facilities.

Linkage into the programmes of adjacent departments in the Social Cluster of government (Health, Social Development, Environmental Affairs, Correctional Services, Education, etc) have substantial potential to create work and income for significant numbers of un- or under-employed visual artists while simultaneously yielding significant impacts in the areas of core mandate of these departments. However, some of the wider challenges facing existing interventions in these areas include:

- They tend to represent ad-hoc and relatively small scale contributions to the larger mandates of the Departments of Education, Health, Environmental Affairs, Social Development and Correctional Services

- These programmes are also in many instances predicated on engagement with departments and institutions operating at a provincial and local level, adding to the complexity of negotiating long term planning in these areas
- The formulation of long-term plans supported by formal agreement between departments and resource allocations from Treasury is a pre-requisite for achieving sustainability and impact in these areas.

Section 5

The Position of Artists

This section is aimed at ensuring that policy recommendations emanating from the overall report take due cognisance of the particular position of what is arguably the core asset of the visual arts sector: the artists that generate the primary content/product around which the sector revolves.

This section of the report summarises findings from the survey (of over 280 artists) relating to the following issues:

- Basic demographics: Developing a profile of the artist population in relation to age, gender, race and location
- Nature of Practice: Understanding the kind of work that visual artists produce
- Work Circumstances: Understanding better the circumstances in which this work is produced
- Career Development: Understanding the professional development pathways undertaken by visual artists
- Market-Related Issues: How artists experience, perceive and engage with the market for their work
- Artists as Employers: Generating data on employment created by artists, and profiling the employee/worker population
- Financial Position and Circumstances: developing a picture of artists earnings and expenditure, and their position in relation to a range of financial issues: tax, retirement, insurance and medical cover
- Funding: artists experience of the funding system for the visual arts
- Obstacles and needs: an outline of the problems and professional development needs reported by artists

The section concludes with a consideration of the current impact of policy and legislation on issues related to artists in the South African context and the identification of a range of policy-related interventions aimed at improving the position of visual artists, specifically in relation to:

- o Copyright collection
- o Artist resale rights legislation
- o Issues related to the rights and status of the artist

5.1 Artist Demographics

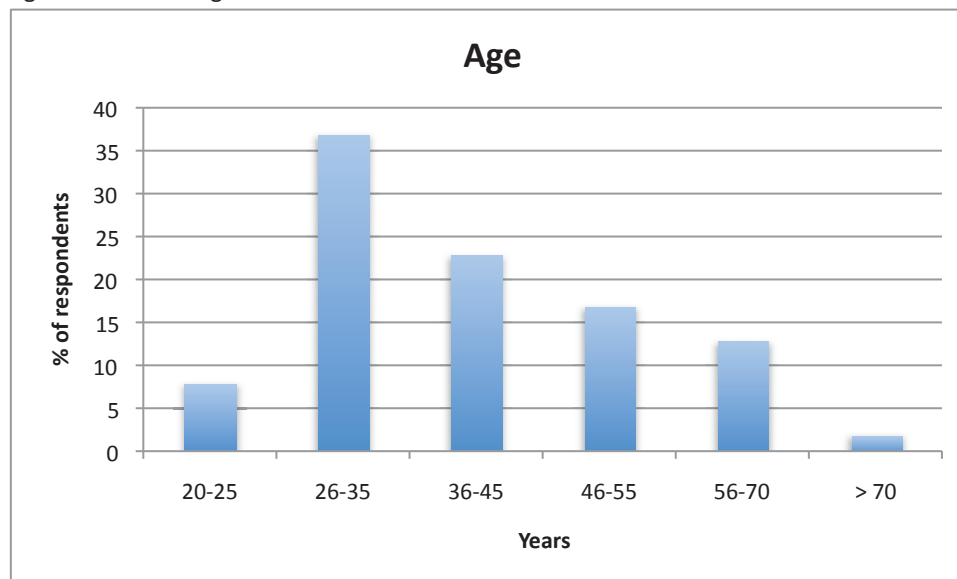
The survey considered the age, race, gender and location of artists. In the case of race, gender and location, these were also used as additional analytic lenses for other data, in order to establish the degree to which these factors impact on key indicators such as level of education, income and the types of obstacles experienced by artists in the development of their careers.

Age

The mean and median ages of the sampled artists were 40 and 38 years old respectively (the latter figure providing a more accurate indication of the age distribution of artists), with a significant majority of the sampled artists (37% of the sample) fall into the 26-35 age group. While the overall distribution is similar to that found in the Bonnar Kennlyside survey of Scottish artists, the overall mean and median ages of artists are substantially lower than, for example, Australian visual artists (mean 47 and median 50 years old). This may indicate a greater level of competition among new entrants into the industry – and a lower career

development 'survival rate' for South African artists, with many moving into adjacent or unrelated careers. This may also be a function of younger artists being more willing to participate in the survey.

Figure 33: Artists Age



Quite substantial regional variation was noted in mean and median ages, probably attributable to skews in the sampling:

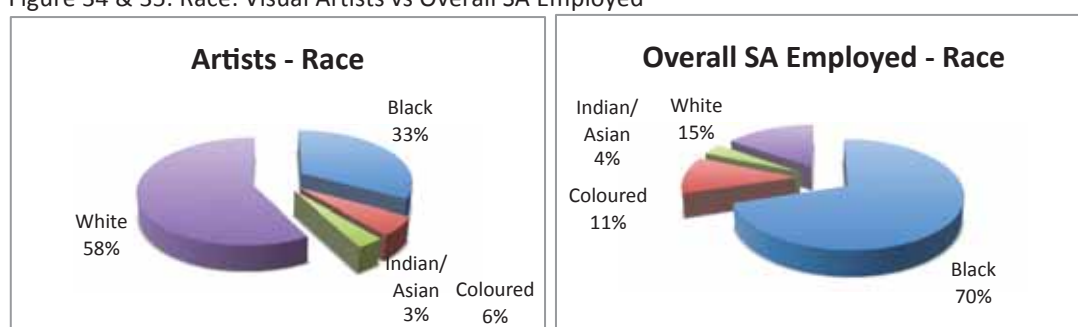
Table 23: Artists Age

Professionals only	N	mean	median	min	max
Gauteng	66	38	35	23	74
Western Cape	57	45	43	23	87
Kwazulu Natal	47	41	38	23	75
Free State & EC	33	37	34	22	66
Other provinces	40	41	41	22	68
Total	243	40	38	22	87

Race and Gender

As noted in section 2 of this report, in contrast to the overall SA labour market, the survey found that the majority of visual artists are white.

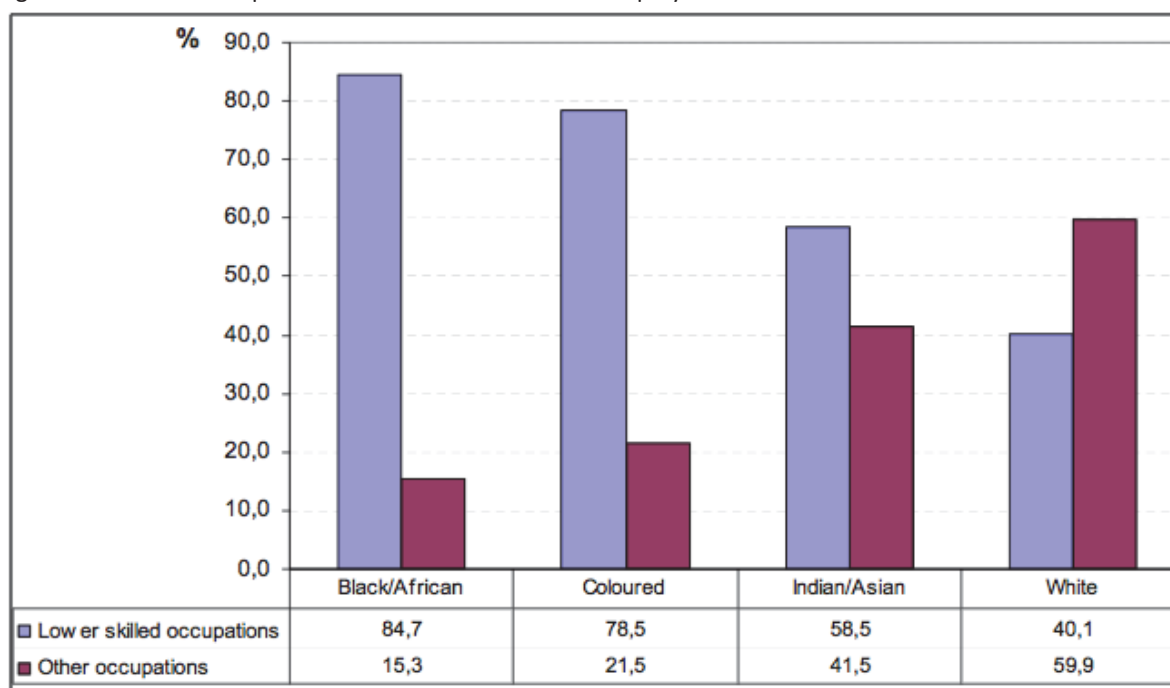
Figure 34 & 35: Race: Visual Artists vs Overall SA Employed



Source: Statistics South Africa, *Labour Market Dynamics 2008* (2009)

This divergence is part of a larger pattern in the South African labour market – more skilled occupations being dominated by white workers. The following graphic from the Statistics South Africa’s 2008 *Labour Market Dynamics* report illustrates the overall trend:

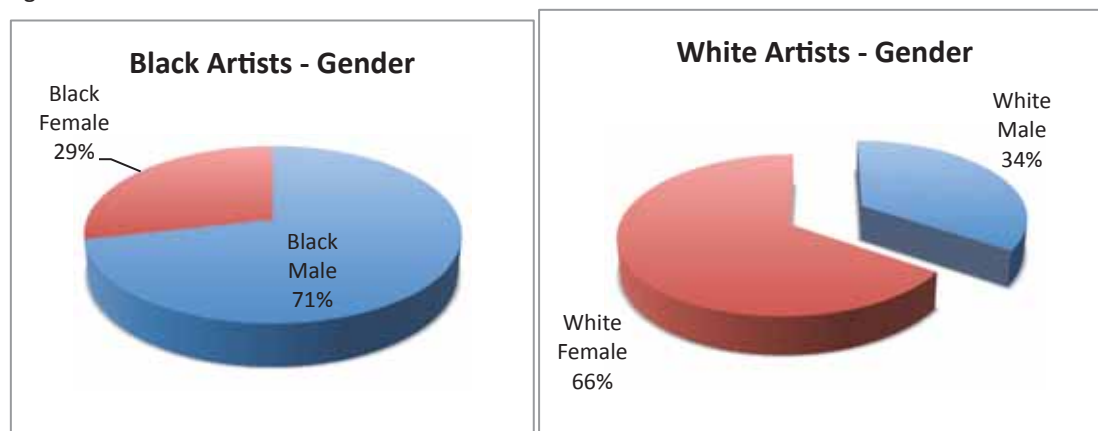
Figure 36: Race vs Occupational Skills Levels: Overall SA Employed



Because the sample sizes for Coloured and Indian artists are small, black African, Coloured and Indian artists have been conflated as a single category in the balance of the analysis.

In contrast to the overall labour market – in which there is 56:44 split between men and women employed in both the formal and informal sectors¹ - the sample suggests that within the visual arts, there is a 50:50 split between men and women artists. This gender split however diverges dramatically when correlated against race:

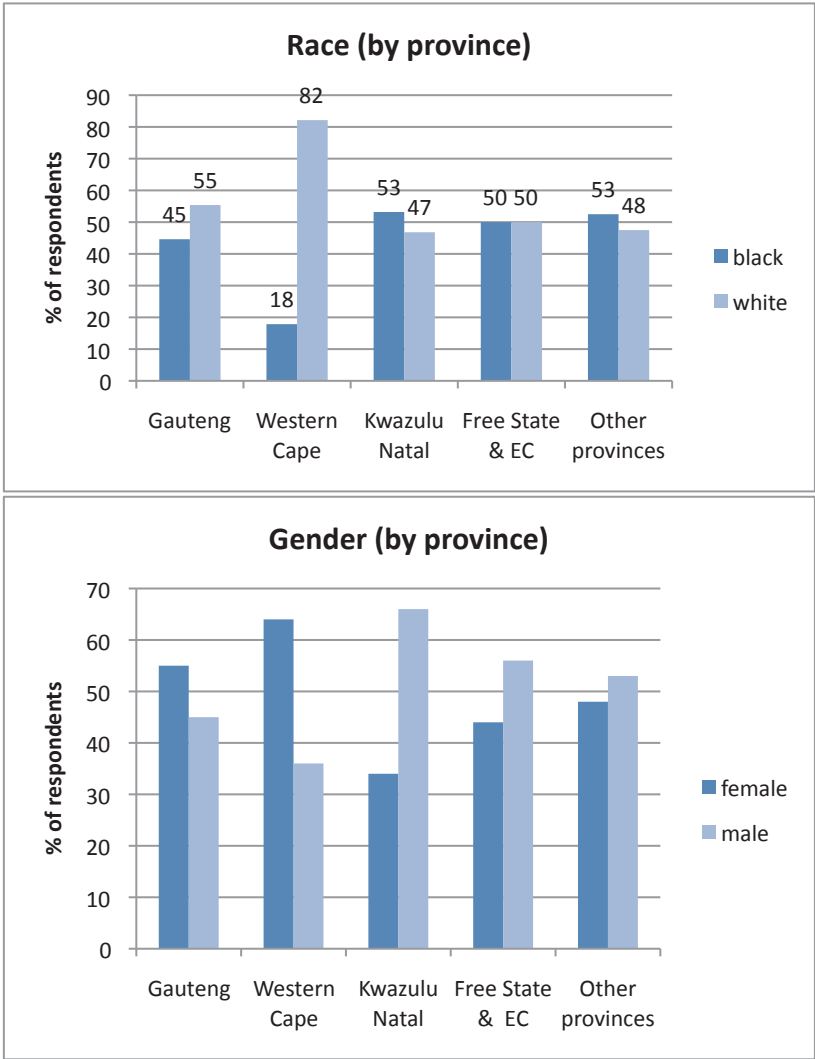
Figures 37 & 38: Gender: Black vs White Artists



¹ Statistics South Africa. 2010. Quarterly Labour Force Survey. Statistics South Africa: Pretoria. Figures reflect quarter 1 for 2009

Breakdown according to race at a provincial level (see chart below) shows a substantially greater proportion of white women artists in the Western Cape, and a large proportion of black male artists in KwaZulu Natal. As previously indicated, we believe that this represents a skew in the sampling, and will require further investigation to clarify the impact on the overall national figures as well as provincial profiles of artists. For the purposes of the present study, within the national analysis, these two tendencies may in fact have a mutually moderating effect.

Figure 39 & 40: Artists Race and Gender by Province



While care should be taken in extrapolating this sample to the overall population, there are a number of key points to be drawn from the data:

- Among white artists, most artists are women – this trend is consistent with similar surveys in Scotland and Australia, where there is a 60:40 split between women and men (it is likely that the actual split in the SA population is not as pronounced as appears here – as previously noted, women were generally more willing than men to participate in the survey)
- Among black artists, the reverse is true to an even greater degree. There are a variety of complex sociological reasons why this may be the case - see the ensuing analysis of subsequent issues related to education and income.

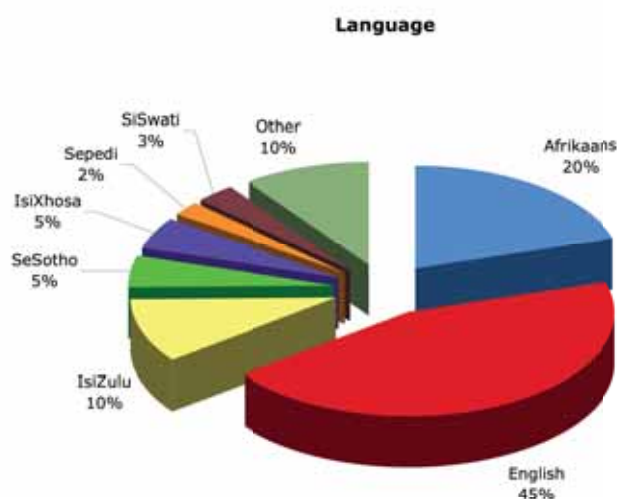
Due to this important difference in the gender profile of black and white artists, the ensuing analysis avoids consideration of gender separate to race in the presentation and interpretation of key indicators. It should also be noted that questions relating to race in the questionnaire were treated with a degree of hostility by some respondents, and were occasionally a basis for artists refusing to participate in the survey. The subsequent analysis nevertheless demonstrates the importance of taking both race and gender into account in interpreting key indicators, and the issues that the industry faces in this regard.

Language and Nationality

Echoing the racial breakdown of artists, the majority (45%) of surveyed artists cite English as a home language, followed by Afrikaans (20%). Black African languages jointly contribute a further 25%, with smaller groups of African language speakers and a small minority of European language speakers included in an 'Other' group (10%).

91% of surveyed artists identify themselves as South African, with the balance of artists being foreign European (3%) and African (7%) nationals.

Figure 41: Artists' Home Language



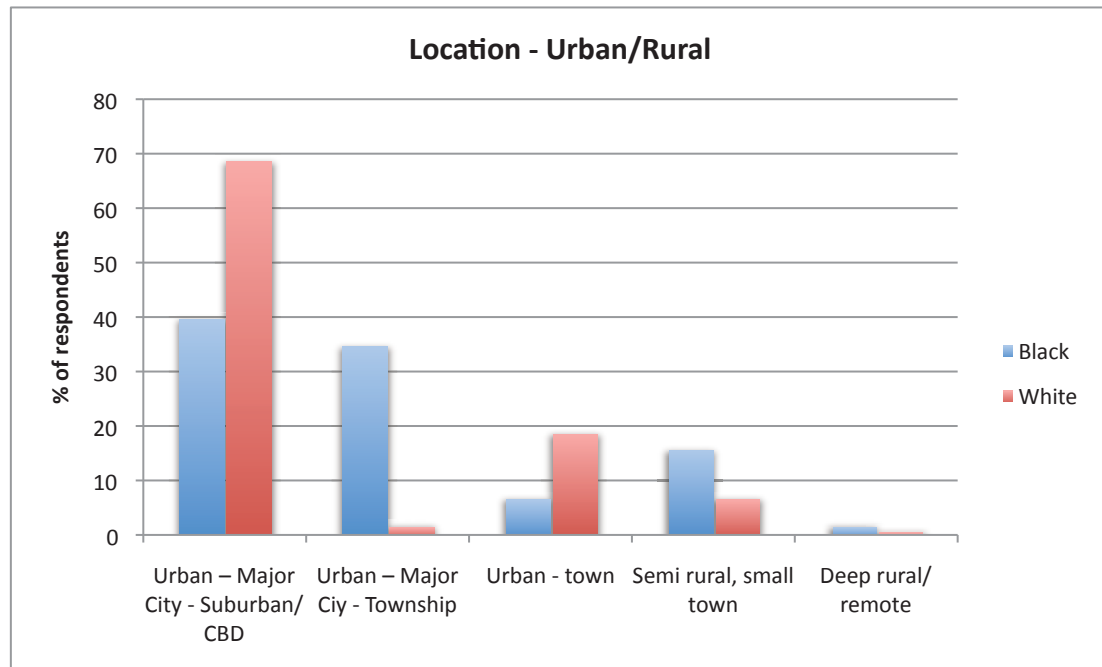
Location

In addition to the provincial distribution of artists referenced above, artists were also asked to characterise where they lived on an urban/rural continuum. Key points emerging from the data:

- the great majority of artists live and work in major metropolitan areas (58%) or surrounding townships (16%); this is broadly consistent with international trends in the developed world (in Scotland the proportion is circa 65%, in Australia, 73%).
- A slightly larger proportion of black artists live in a CBD/suburban context (40%) than in a township context (35%). Black male artists (28%) are more likely to live and work in an urban township context than black female artists (19%).
- Black artists are more likely to live and work in towns outside of the major metros than white artists

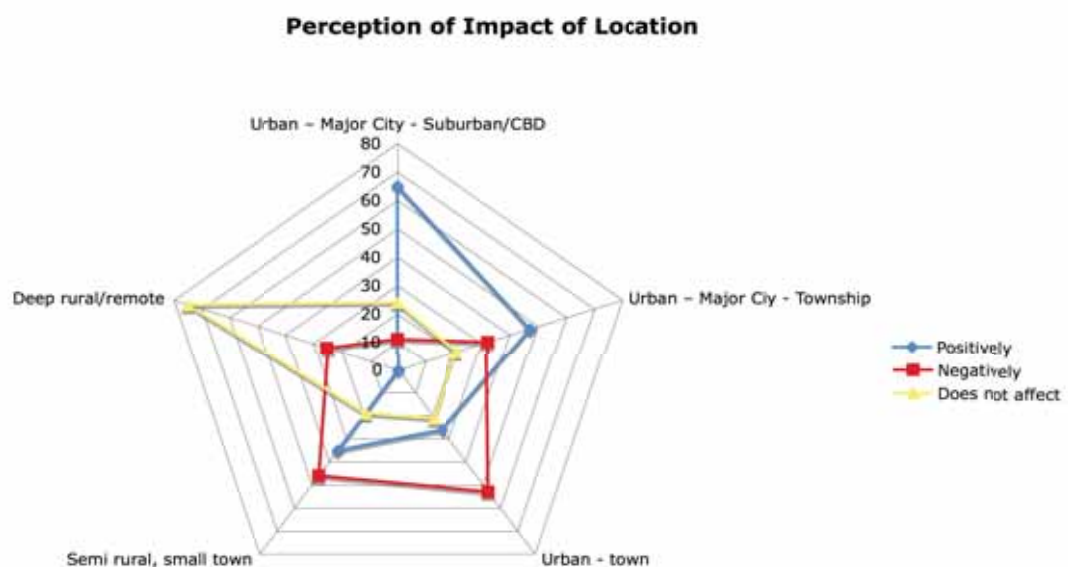
- White artists are more likely than black artists to live in small, semi-rural towns – the phenomenon of small artist communities such as Clarens, White River (Mpumalanga), Greyton (Western Cape) and towns along the Midlands Meander route in Kwa-Zulu Natal. These artists also tend to be older.

Figure 42: Artists Location: Urban vs Rural



- The majority of artists living in towns and semi-rural contexts perceive their location as impacting negatively on their market access
- The majority of artists living in metropolitan and township contexts view their location as impacting positively on market access

Figure 43: Artists Location: Artists Perception of Location



Artist Mobility

- Sample sizes for Limpopo, North West, Mpumalanga and Northern Cape are generally too small to yield meaningful data on this issue
- Of the three provinces with the major metropolitan industry clusters, the Western Cape shows the greatest inward migration of artists who are originally from other provinces (with 31% of Western Cape artists coming from Gauteng originally); artists currently living and working in Kwa-Zulu Natal are least likely to originally come from somewhere else
- The Western Cape, Gauteng and Limpopo demonstrate the greatest inward migration of artists from other countries (1 in 10 artists in each are from other countries) - with the majority of the Gauteng and Limpopo groups coming from other countries in Africa and most of the Western Cape group coming from European countries
- Consistently high proportions of artists living and working in other provinces originally come from Gauteng
- The large proportion of the Northern Cape sample coming from other countries is a function of Khoisan communities that were originally located in Namibia

Table 24: Current Province vs Province of Origin

	Originally from:									
	GP	WC	KZN	Free State	EC	North-West	Lim	Mpum	NC	Other Country
Currently living and working in:										
Gauteng	56.1	7.6	6.1	3.0	3.0	1.5	6.1	3.0	3.0	10.6
Western Cape	31.0	46.6	3.4	5.2	6.9	0.0	0.0	0.0	1.7	5.2
KwaZulu-Natal	12.8	8.5	66.0	0.0	2.1	0.0	0.0	0.0	0.0	10.6
Free State	22.2	0.0	5.6	55.6	11.1	0.0	0.0	0.0	0.0	5.6
Eastern Cape	31.3	0.0	0.0	0.0	62.5	0.0	0.0	0.0	0.0	6.3
North West	16.7	16.7	0.0	16.7	0.0	50.0	0.0	0.0	0.0	0.0
Limpopo	11.1	0.0	0.0	11.1	0.0	0.0	66.7	0.0	0.0	11.1
Mpumalanga	23.1	0.0	7.7	0.0	0.0	7.7	0.0	53.8	7.7	0.0
Northern Cape	16.7	8.3	8.3	0.0	0.0	0.0	0.0	0.0	25.0	41.7

Multiple entry visas are available for craft people from countries that form part of the South African Development Community (SADC). It would be possible to investigate the possibility of including visual artists in this provision. Banks currently do not allow persons without a work permit to have a South African bank account, which causes problems for artists who need a local account. Standard Bank is apparently reconsidering this rule. Foreign students intending to study in SA do not need a visa, but can get a study permit for the minimal study period. Students are allowed to be employed part-time (up to 20 hours per week), provided that the education institution they are associated with is formally registered with the Department of Education.

In the context of its participation in SADC, the South African government is considering a protocol for free movement of persons within SADC for 90 days, similar to the operation of the Schengen visa in Europe. Due to security concerns the system has not yet been operationalised.²

² interview Ms Rachelle Reyneke, Department of Home Affairs

5.2 Nature of Practice

Media Employed

The survey required artists to indicate main and subsidiary media that they employ in their work. Painting and drawing feature as the dominant media across all groups, most markedly so among black male artists, least so among black female artists (37%). Black women artists are more likely than any other group to employ installation and performance art as a primary medium, while black men are more likely to employ printmaking as a primary medium – among all groups, black men favour more traditional media (painting, sculpture, printmaking), black women more contemporary media (video, performance, installation). White women are most likely to employ new media and digital arts as a primary medium. A significant group of largely women artists within the ‘other’ category employ a range of fine craft practices in their work, principally ceramics.

Figure 41: Artists Primary Medium

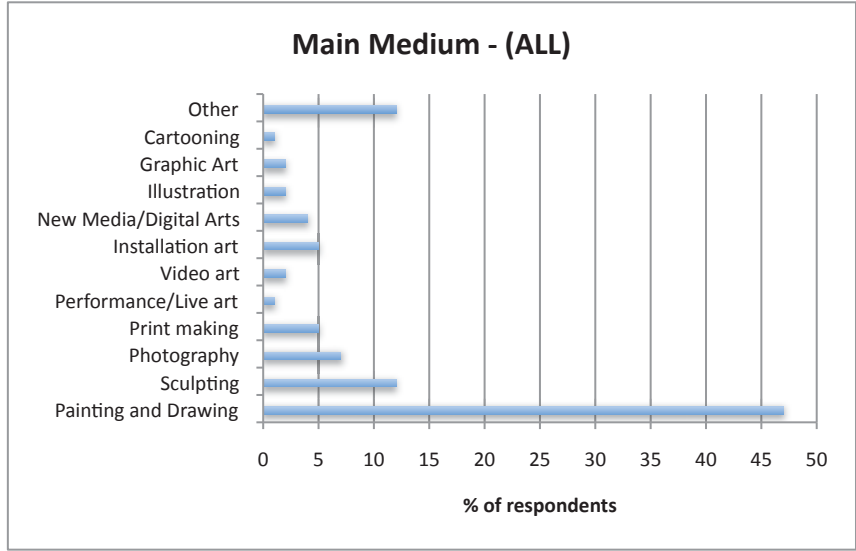
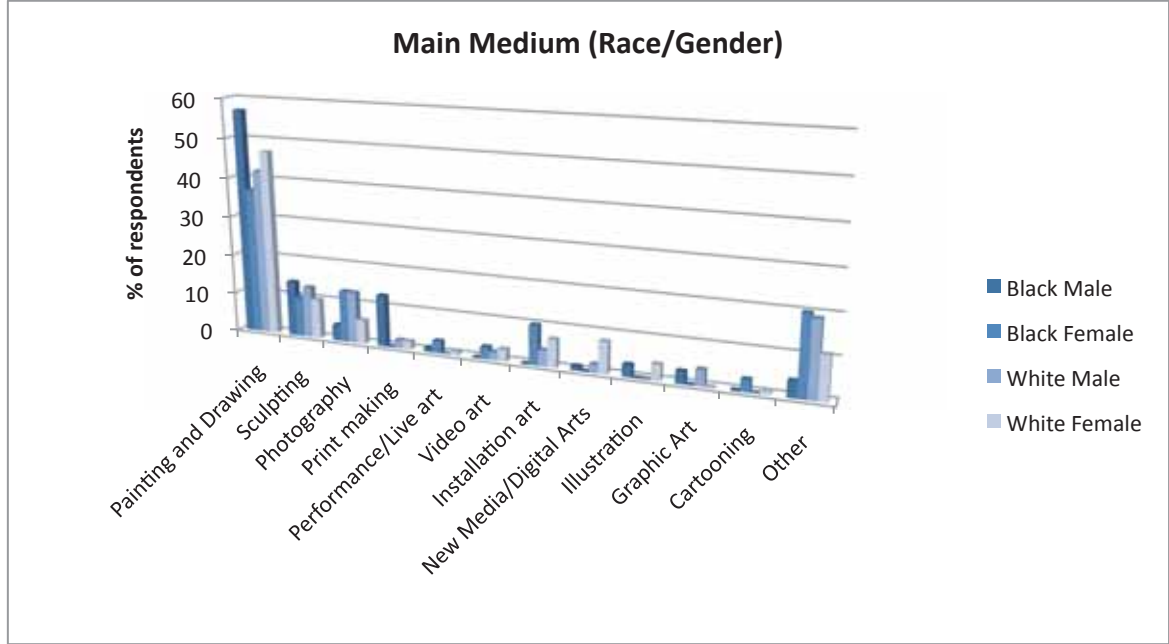
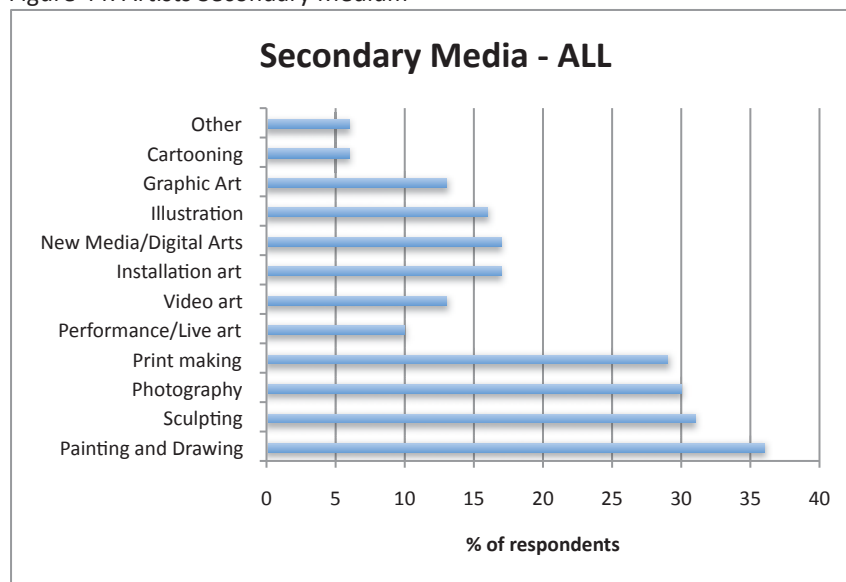


Figure 43: Artists Primary Medium vs Race/Gender



Artists were also asked to indicate secondary media that they employ in their practice. Respondents indicated a very wide variety of additional media employed, with sculpting, printmaking and photography featuring strongly within this group, as well as more 'contemporary' media such as installation, digital arts, performance art and video art appearing in the selection of secondary media. An overall trend is for artists to generally work across a variety of media rather than a single medium.

Figure 44: Artists Secondary Medium



Area of Practice

In order to gain a better understanding of the broad market segments in which artists see themselves operating, respondents were asked to indicate the broad area of practice in which they perceived their work belonging. Options were indicated which each have distinct sets of consumers, distribution channels, and approaches to pricing and valuation. The options included:

- contemporary, conceptual work, including new media, installation, video and performance based work
- traditional artworks employing traditional materials and subject matter
- public art
- community arts
- craft art/fine craft

Artists were able to indicate more than one response to this question. The majority of artists see themselves as working within a contemporary idiom, though there was a great deal of cross-over between segments, with the majority of artists indicating their location within more than one broad area of practice. Reinforcing the findings relating to primary and secondary media, black women artists registered the highest results relating to contemporary practice, and the lowest relating to traditional practices, with black male artists indicating an inverse trend. The one area of consistency between black men and women respondents was in the area of craft art/fine craft, suggesting that there are two quite distinct sub-groups within the black women group – a (larger) group of black women artists who practice in a primarily contemporary idiom and a smaller group which practice

within a fine craft/craft art framework. Responses from white male and white female artists were broadly consistent.

Figure 45: Area of Practice

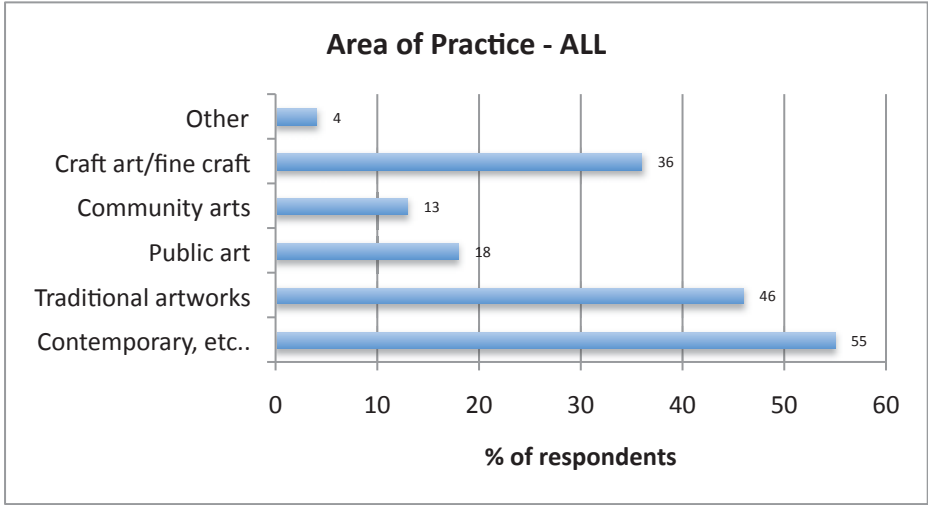
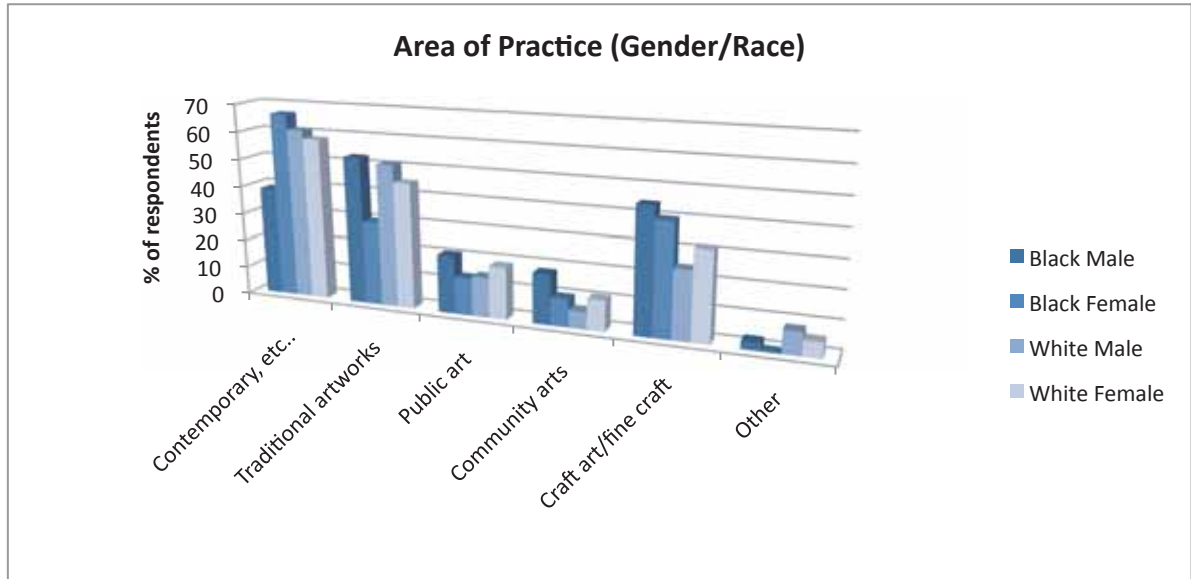


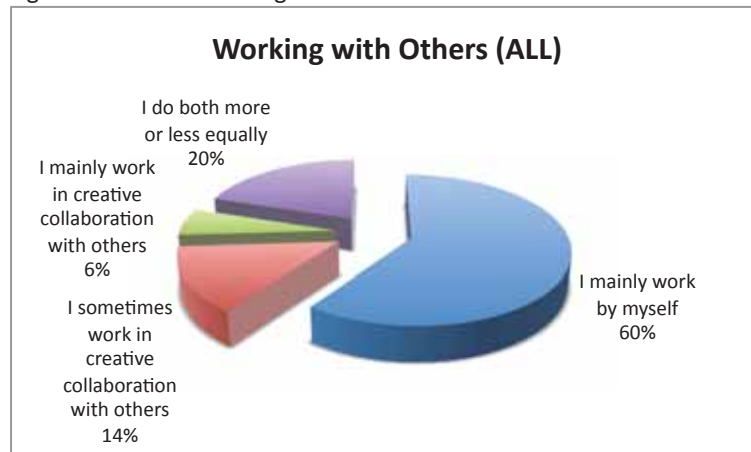
Figure 46: Area of Practice vs Race/Gender



Working with Others

The visual arts have traditionally been an area of the arts characterised by solitary working practices, in contrast to other areas such as theatre, dance and music that demand collaboration with other practitioners. The survey demonstrates that there are now substantial numbers of artists who work collaboratively. In varying degrees almost half of the respondents indicate that they work on a collaborative basis in some degree, as indicated in the following chart:

Figure 47: Artists and Degree of Collaborative Practice



5.3 Career Development and Education

Educational Background

Understanding the complex pathways through which artists enter the visual arts industry is important in an industry which has high – sometimes punishing - barriers to entry and professional success. As later sections demonstrate, the gap between those that achieve greatest success in the profession – in terms of income and recognition – and the majority of artists, is substantial.

Consistent with international trends in the developed world, South African visual artists are highly educated, a situation enabled through a substantial infrastructure of tertiary institutions offering fine arts qualifications spread across the country. A majority of artists (72%) having completed a university degree, and a significant group (38%) having completed a postgraduate degree.³ In Scotland, 82% of artists report holding a university qualification, in Australia 77% (Bonnar & Kennlyside 2002: 23; Throsby & Hollister 2004: 90). There is however some significant variation along lines of race and gender – while white artists exceed the international examples referenced (85% have tertiary training), only 53% of black artists have a tertiary degree, with significantly more black women than black men having come through university training (63% vs 49%). Black male artists demonstrate the greatest uptake in training through SETA learnerships or skills programmes, an historically recent work-based training pathway (6% uptake against 3% across all respondents). There are also a larger proportion of black women artists with no formal training at all, suggesting a position at both ends of the professional development spectrum.

³ It should be noted that there is some ambiguity regarding the postgraduate status of the BA (Fine Art) degree, a professional degree which is notionally equivalent to an honours degree, though it is sometimes referred to as an undergraduate/first degree. The questionnaire did not clearly differentiate these specific degree structures, so there may be a degree of inconsistency in the identification of the level of qualification across respondents.

Figure 48: Artists Highest Level of Formal Education

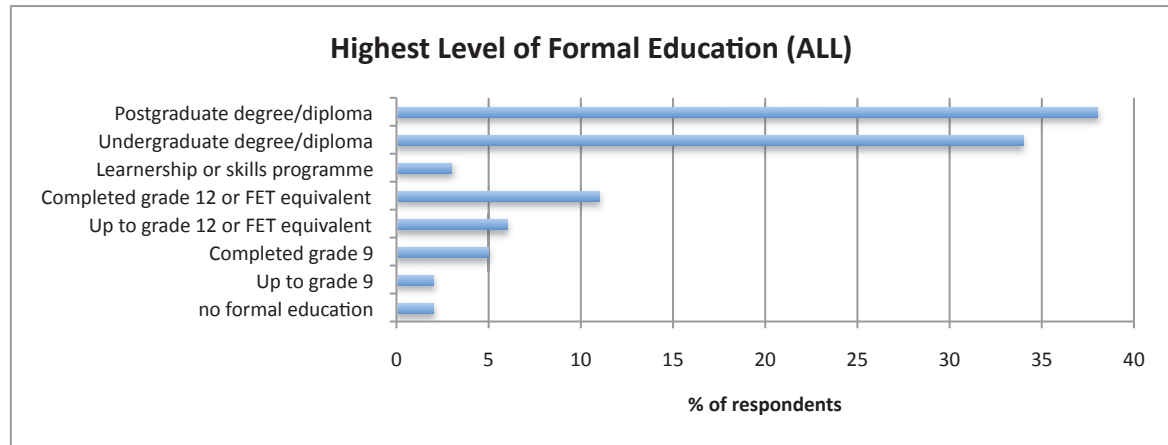
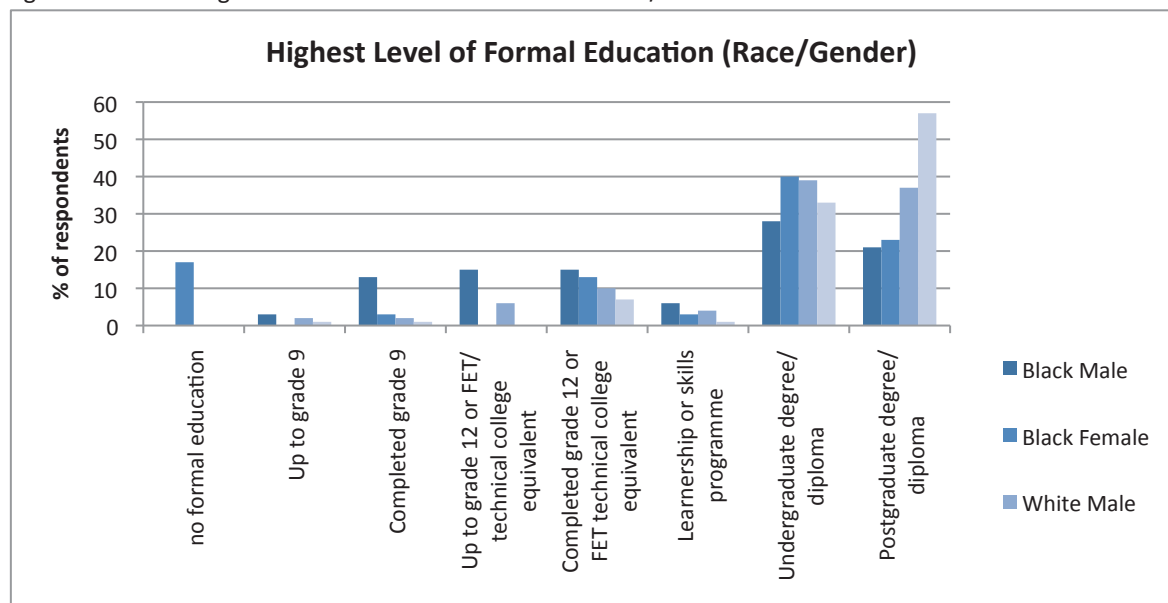
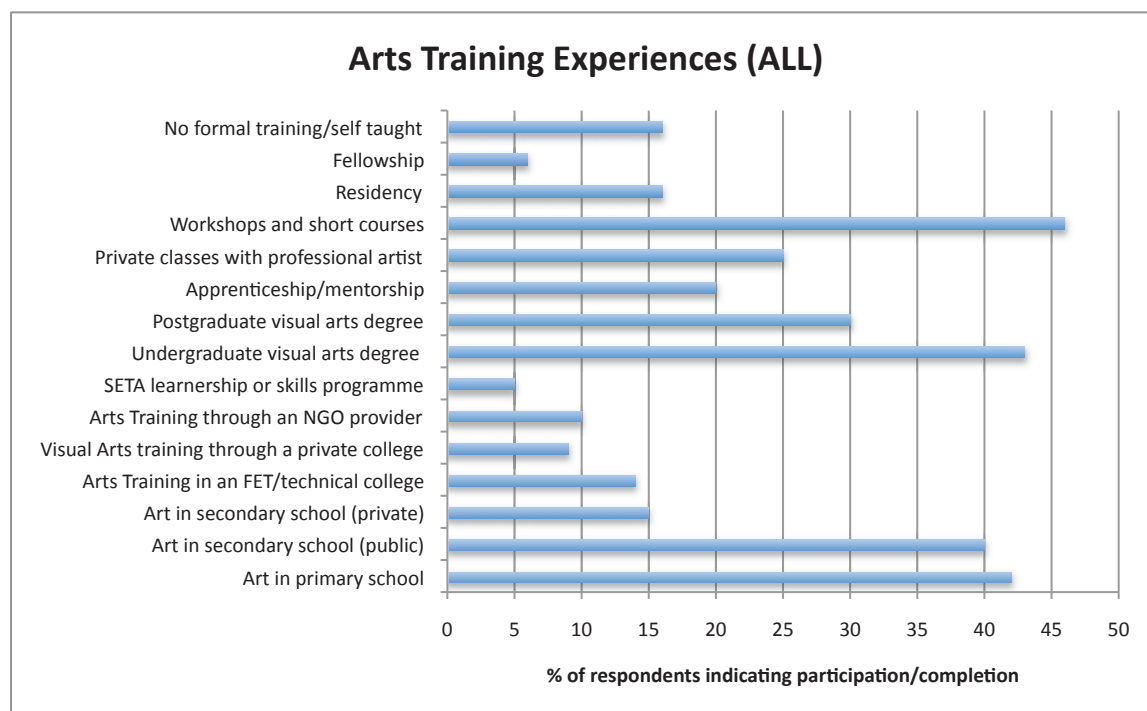


Figure 49: Artists Highest Level of Formal Education vs Race/Gender



Respondents were also asked about the full range of their participation in education and training related specifically to the visual arts, with responses indicated in the following chart. Aside from affirming the significance of tertiary training, responses highlighted the importance of workshops and short courses for artists' professional development as well as mentorships and classes from practicing professional artists. A significant proportion of (predominantly black male) respondents indicated that they 'have no formal training/are self-taught' (16%).

Figure 50: Experience of Art Tuition (overleaf)



Professional Validation - Exhibitions

For most artists, the presentation of their work through exhibitions represents the core outcome around which all other activity revolves and culminates. Exhibitions in public or commercial institutions traditionally provide the primary route through which work enters the interlocking worlds of the art market and visual arts discourse, and through which artists build their reputations within these two spheres.

Artists were asked about their exhibiting record during the course of the last **five** years. Roughly 80% of respondents indicated that they had had work publicly exhibited during this period, with relatively minor variations on the basis of race and gender (white artists more likely to have staged a solo exhibition, black artists more likely to have participated in group exhibitions). Rates for solo exhibiting are lower for South African artists than their international counterparts – in the Throsby/Hollister study, 39% of Australian artists had had a solo exhibition at a major gallery and 44% at a smaller gallery - the equivalent figures for South African artists are 24% and 35% respectively. 46% of Scottish artists surveyed in the Bonnar Kennlyside study indicated that they had staged a solo exhibition in the last two years.

Figure 51: Artists Experience of Exhibiting Work – Past Five Years

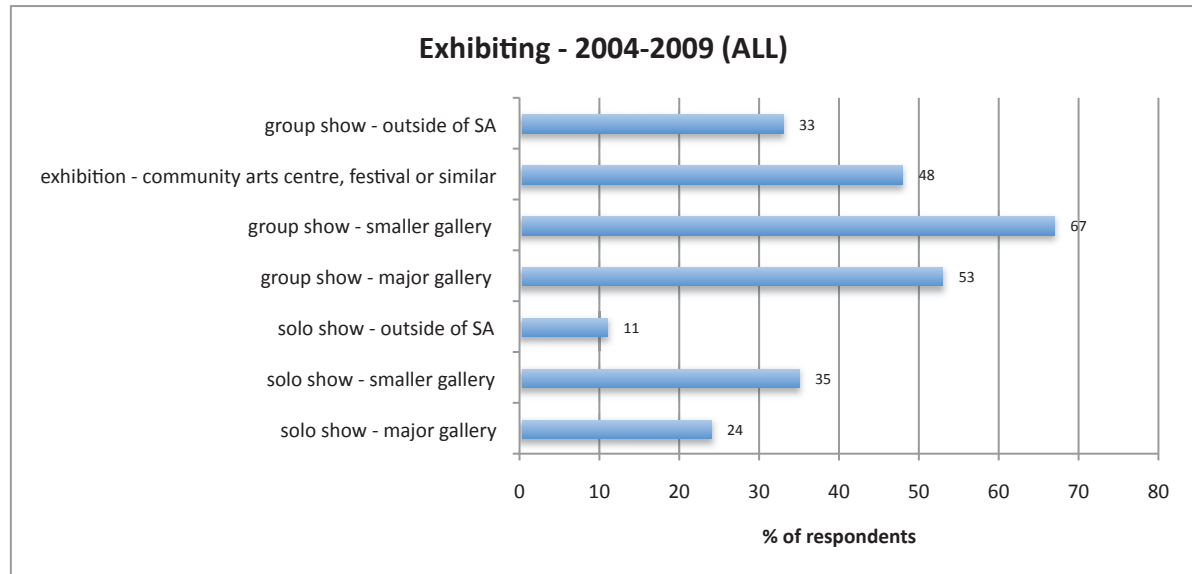
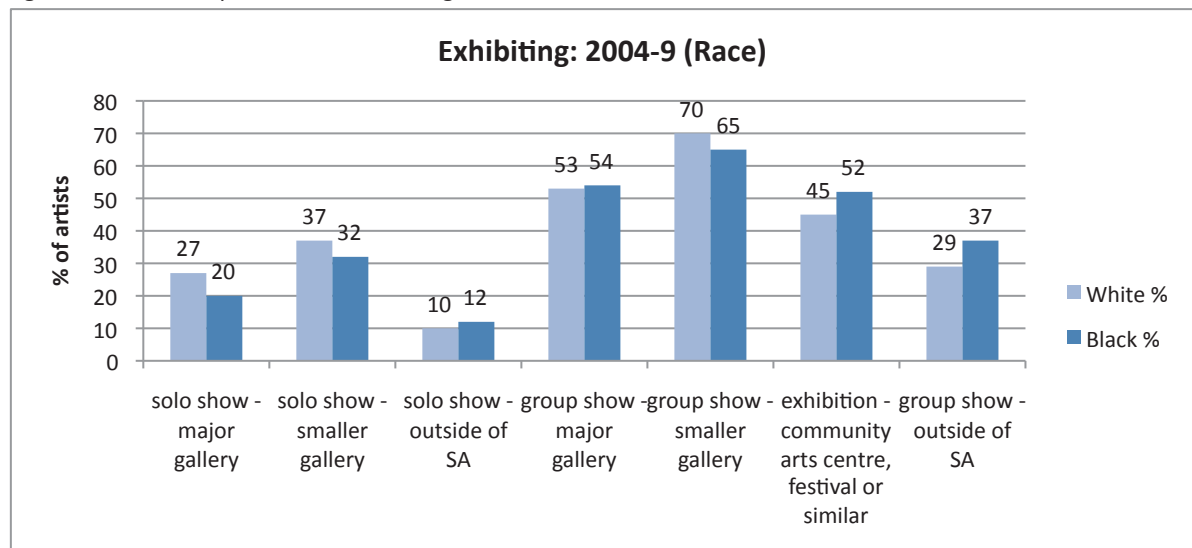


Figure 52: Artists Experience of Exhibiting Work – Past Five Years: Race



Professional Validation - Other Achievements

Aside from exhibitions, there are a variety of other critical contexts for professional validation in the development of an artists career. These include commissions and purchases through public or private entities, residencies and awards, as well as the exposure of their work through the internet and printed publications (see chart below). Being commissioned to produce a work by a private individual is the most common form of professional validation in this area. Artists record a surprisingly high incidence of having had their work purchased by a public or private institution (36% and 43% for public and private institutions respectively) – exceeding the experiences of Australian artists (only 32% indicated that they had a work purchased by a public institution).

The high rate of patronage from public institutions is surprising given the extreme limitations on acquisition budgets for public institutions. The strong showing in this area may be a consequence of the broadness of the understanding of what constitutes a 'public entity' in the South African context, which could include public art commissions (the rates are highest in Gauteng and KwaZulu Natal where most of the commissioning activity has

been taking place), government departments buying work directly from artists and agencies like the Johannesburg Art Bank purchasing work. In the Australian study, ‘public institution’ may have been more narrowly interpreted as meaning a ‘public art museum’.

Responses also indicate the increased importance of the internet as a channel for exposure of artists’ work, though there is a significant disparity here between the extent to which white and black artists’ utilise the internet for this purpose.

Figure 53: Professional Achievements

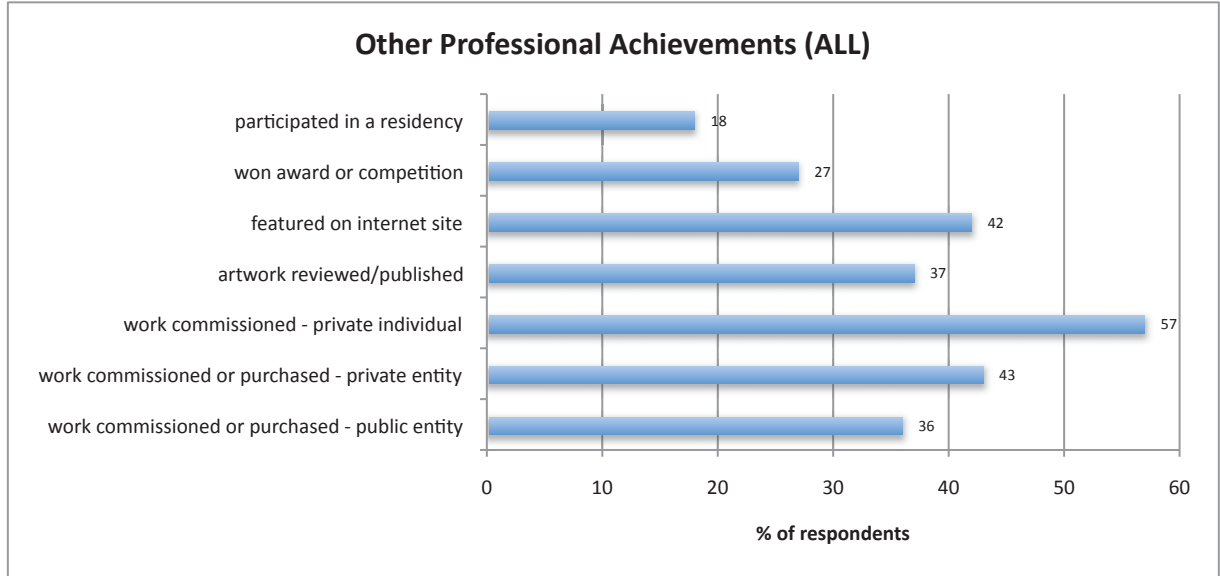
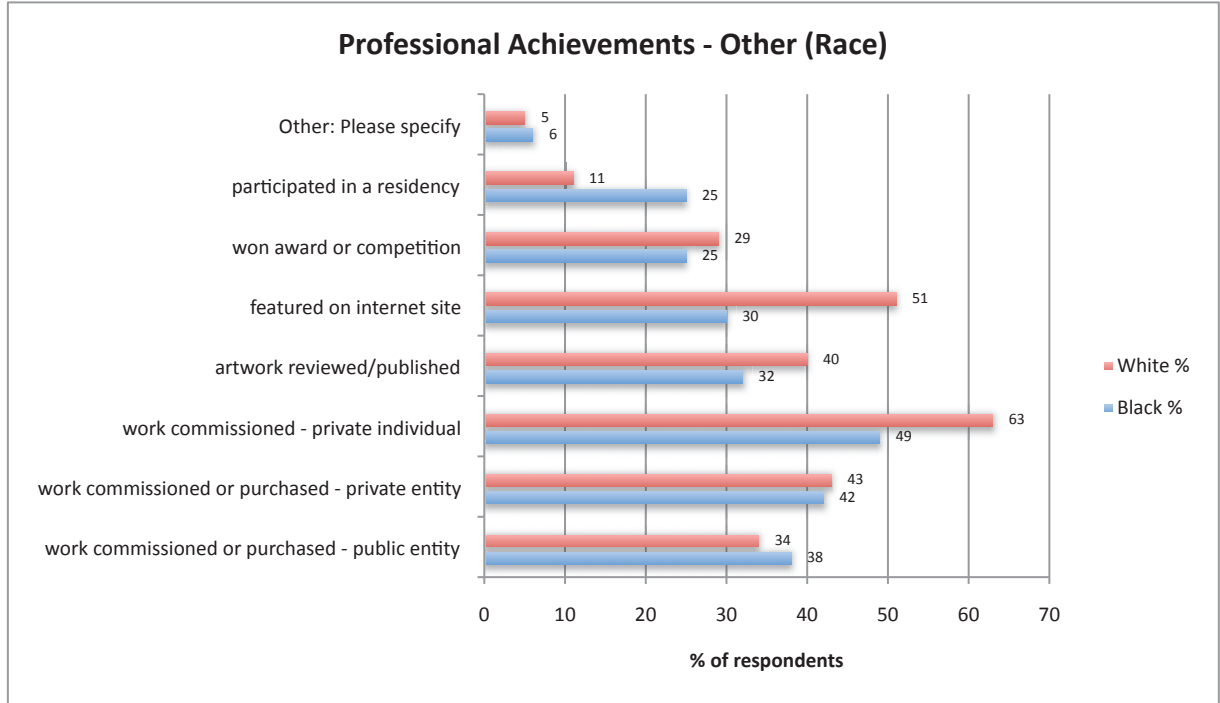


Figure 54: Professional Achievements vs Race



Professional Validation - Defining Moment

Artists were asked which experience defined their perceiving themselves as professional artists. The majority (42%) of artists indicated that being able to support themselves

financially represented the most significant moment in this regard, with a particularly high proportion of black artists indicating this as their defining experience. This contrasts with, for example, the Australian experience, where the majority (52%) of visual artists indicate the staging of a solo exhibition as the defining moment of professional validation. Only 9% indicate “earning their first income” as a defining experience and an even smaller proportion (6%) indicate being able to make a living as an artist being their defining experience. The importance attached to financial sustainability is significant in the South African context, where the kind of cushions that exist for early career artists (through family resources and networks, unemployment/social grants) are much less prevalent than in the advanced economies and ‘welfare state’ contexts of Australia and many European states.

This is borne out by responses given to an additional question about the age at which this defining moment took place. The median value for South African artists was 26 years old, six years younger than the median age (33) at which Australian artists regard themselves as achieving a professional status. This trend is even more pronounced for black artists who recorded a median value of 24 years (versus 28 for white artists). Anecdotal evidence confirms that there is particular pressure on young black artists to enter the marketplace – sometimes to the detriment of the maturation of their creative practice.

Figure 55: Defining Professional Moment vs Race

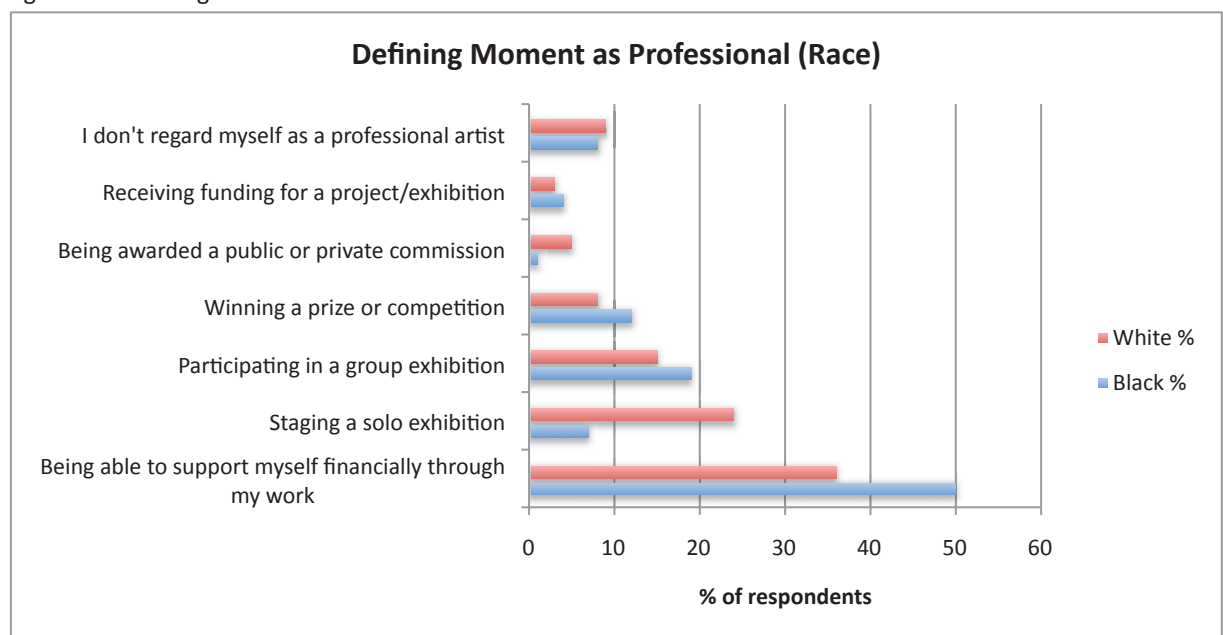


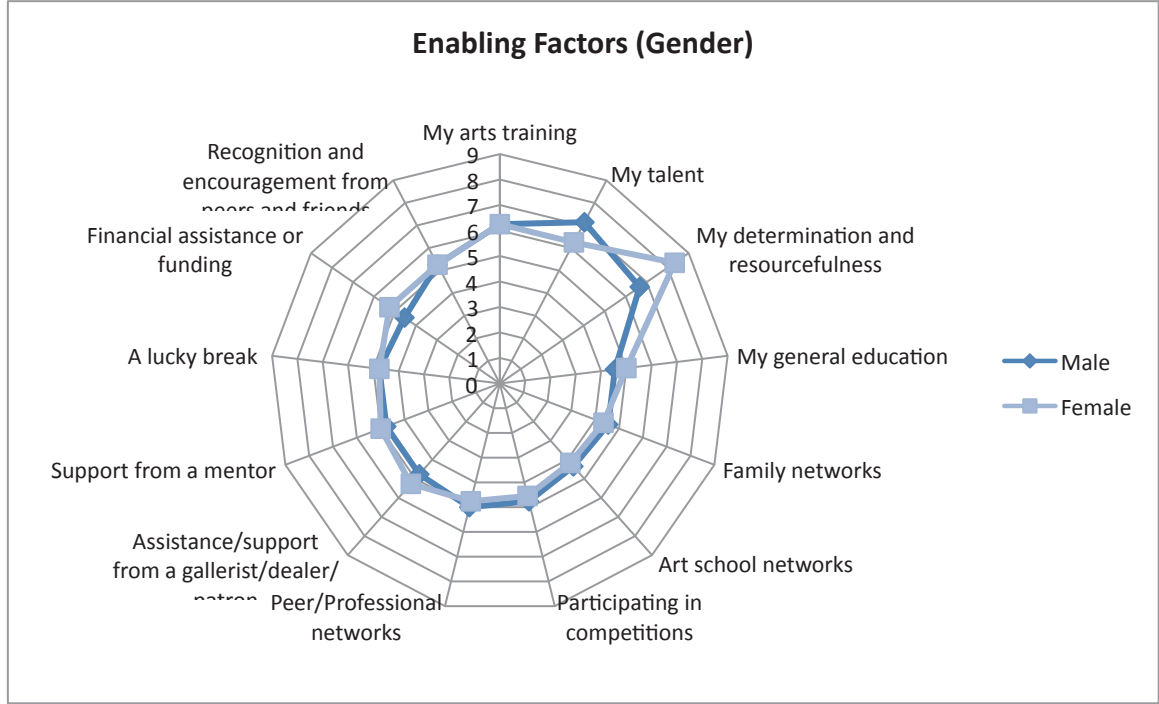
Table 25: Age at Defining Moment

	Black	White	ALL
N	92	123	218
mean	25	31	28
p25	21	24	22
median	24	28	26
min	5	18	5
max	49	68	68

Enabling Factors for Professional Development

Respondents were requested to identify the primary factors contributing to their professional development or success to date, rating thirteen factors on a four-point scale (translated into a 2.5 – 10 point scale in the chart below). All artists identified internal capacities rather than external assistance, circumstances and opportunities as being the most significant. The responses were largely consistent across race, though some interesting disparities are evident in the responses based on gender. Male artists believe that their intrinsic talent is the most significant contributing factor, whereas women attach substantially greater significance to ‘determination and resourcefulness’. All artists recorded their arts training as being the second most important factor and current peer/professional networks as being substantially more important than art school networks, which received the lowest rating as a success factor. Family networks also rated low, alongside participation in competitions.

Figure 56: Enabling Factors for Professional Development by Gender



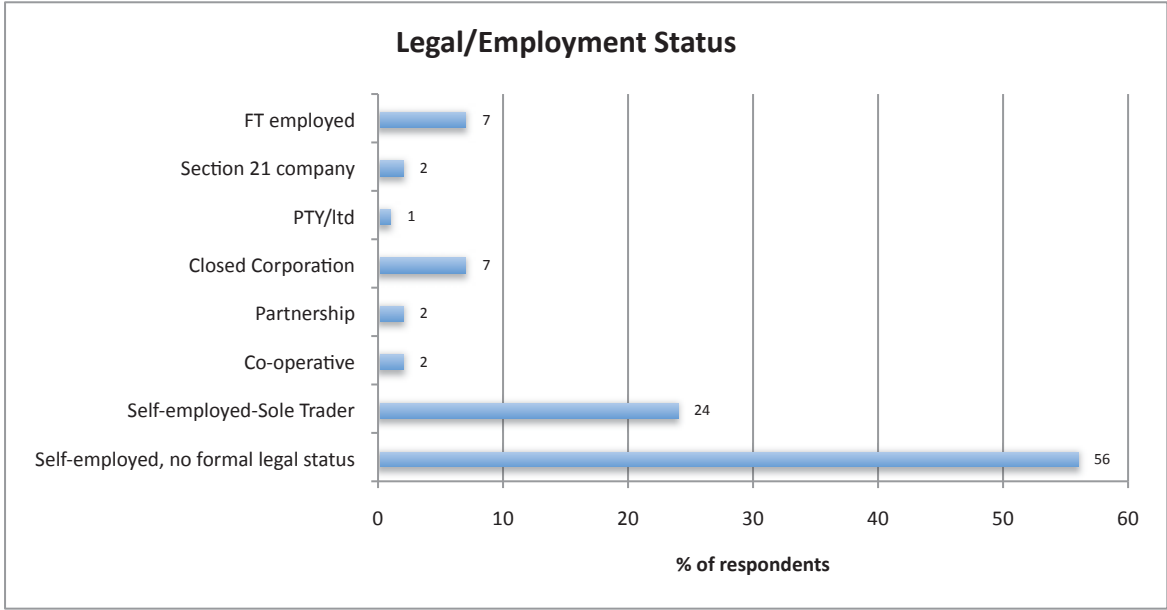
5.4 Work Circumstances

This section considers data relating to the nature of artists working lives: their work status, how they juggle their time between different activities, and the pressures that they face in balancing their creative work with the need to maintain some form of income.

Employment Status

The great majority (at least 80%, based on the survey data) of South African visual artists are self-employed, consistent with international trends⁴. Two thirds of this group describe themselves as having no formal legal or tax status as freelance/self-employed individuals, with the balance of the self-employed indicating that they operate as sole traders from a legal and tax point of view. A small proportion (7%) are in full-time employment (mostly as lecturers in tertiary institutions), and 14% have established some form of company structure around their practice, ranging from Closed Corporations (7% of all respondents) to very small numbers of co-operative, partnerships and section 21 companies, with one artist indicating a PTY (Ltd) structure for their work.

Figure 57: Artists Legal/Employment Status

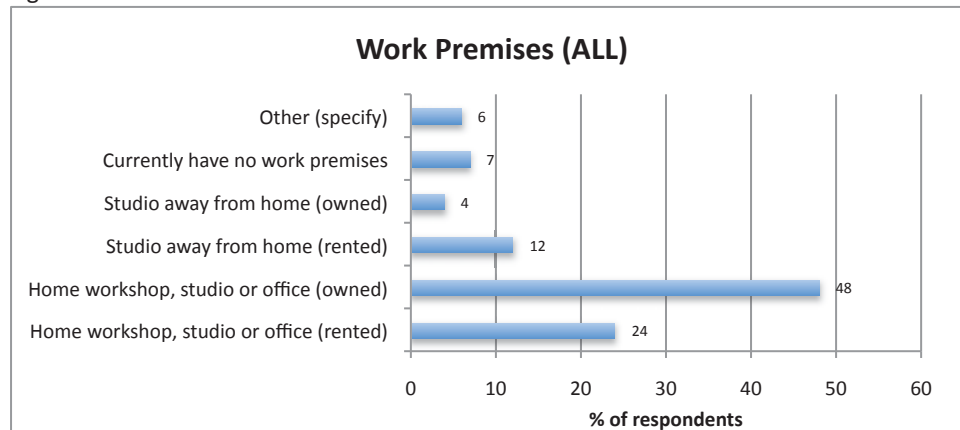


Work Premises

The majority of artists work from a studio in or connected to a property that they own. Black artists are substantially less likely to own these premises than white artists (37% vs 56%), and are more likely to rent. Only a small proportion of artists are able to rent or own a studio away from home (16%) and only 4% of artists own work premises away from home.

⁴ The Throsby/Hollister study of Australian artists records precisely the same percentage (p 38)

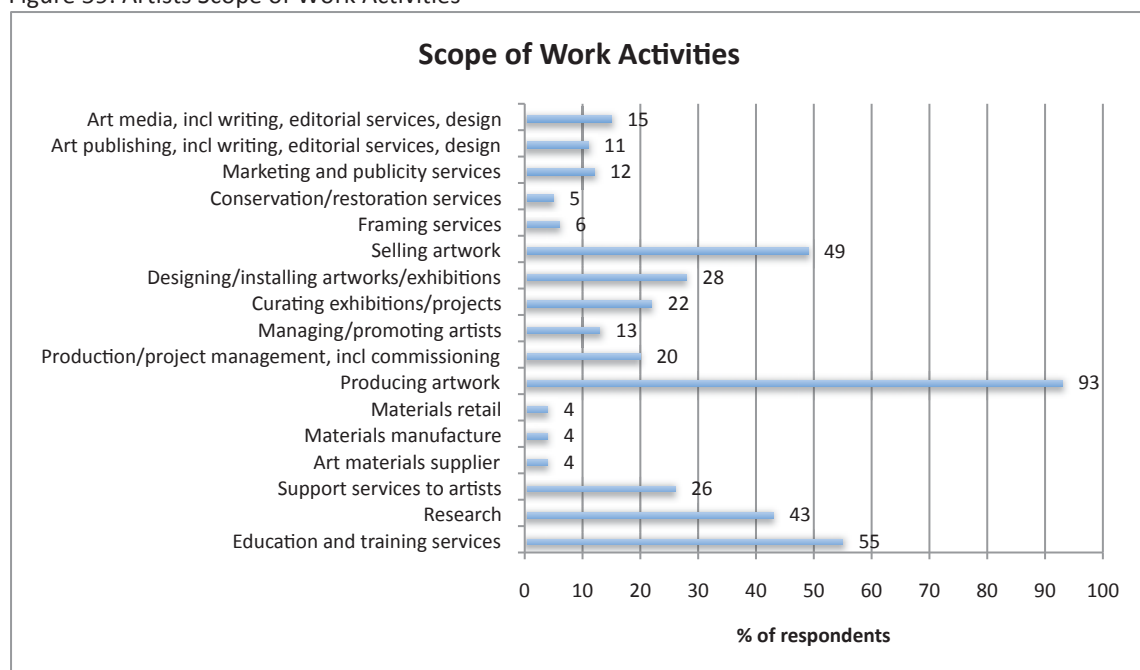
Figure 58: Artists Work Premises



Scope of Work Activities

Visual artists participate in a very wide variety of work-related activities beside the core activity of producing artwork. The most common associated/subsidiary activities are education and training (55% of all respondents), selling artwork (49%) and research (43%), with over 1 in 5 artists also being involved in curating exhibitions and projects and providing support services to other artists.

Figure 59: Artists Scope of Work Activities



Division of Time

Artists work on average for 44 hours per week, slightly more than the overall age of the working population (43,9 hours)⁵.

⁵ Statistics South Africa. 2010. Quarterly Labour Force Survey. Statistics South Africa: Pretoria. Figures are for 2008. Section 4-15

Table 26: Hours Worked per Week

Hours a week	Professional
N	244
mean	44
p25	35
p50	45
min	0
max	119

Artists were asked to indicate how they divided their time between different activities, and how this related to their ability to sustain themselves.

- The proportion of time spent producing artwork and directly related activities was on average 45% of total work time or 22 hours, with significant proportions of time spent on non-arts related work (16%), other arts-related work (12%) and art-related teaching (11%). This is comparable to Australian artists, who spend circa 49% of their time on their creative work.
- Only 19% of artists indicate that they are able to spend more than 70% of their time on their creative activity and immediately linked activities – these may be regarded as ‘full-time artists’. The majority (57%) of artists fall into a middle ‘part-time’ group able to spend between 25% and 70% of their time producing artwork, and a quarter of the surveyed artists were able to spend less than a quarter of their time producing their own creative work – ‘minor time’ artists forced to squeeze this activity in among a range of other commitments, largely income-related.
- 25% of the sampled artists indicate that they spend less than 25% of their time on their core creative activity.
- Male artists are able to spend somewhat more time on their core creative work than female artists (48% of time vs 43% of time). A very large proportion of black female artists (47%) were only able to invest less than 25% of their time in their core creative activity.
- Artists who spent less than 50% of their time on their core creative work indicated that the main reason for not being able to devote more time was due to the need to earn supplementary income. The second most significant reason cited (more so for women) was domestic/family responsibilities
- 52% of respondents indicated that they have to undertake work outside of the visual arts sector in order to sustain their work as a visual artist

Figure 60: Artists Allocation of Time to Different Work Activities (%)

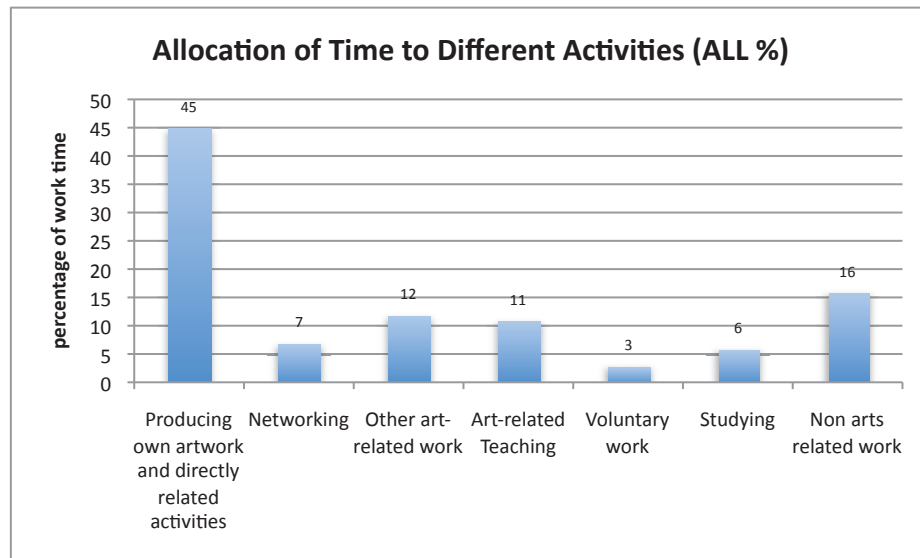


Figure 61: Artists Allocation of Time to Different Work Activities by Race

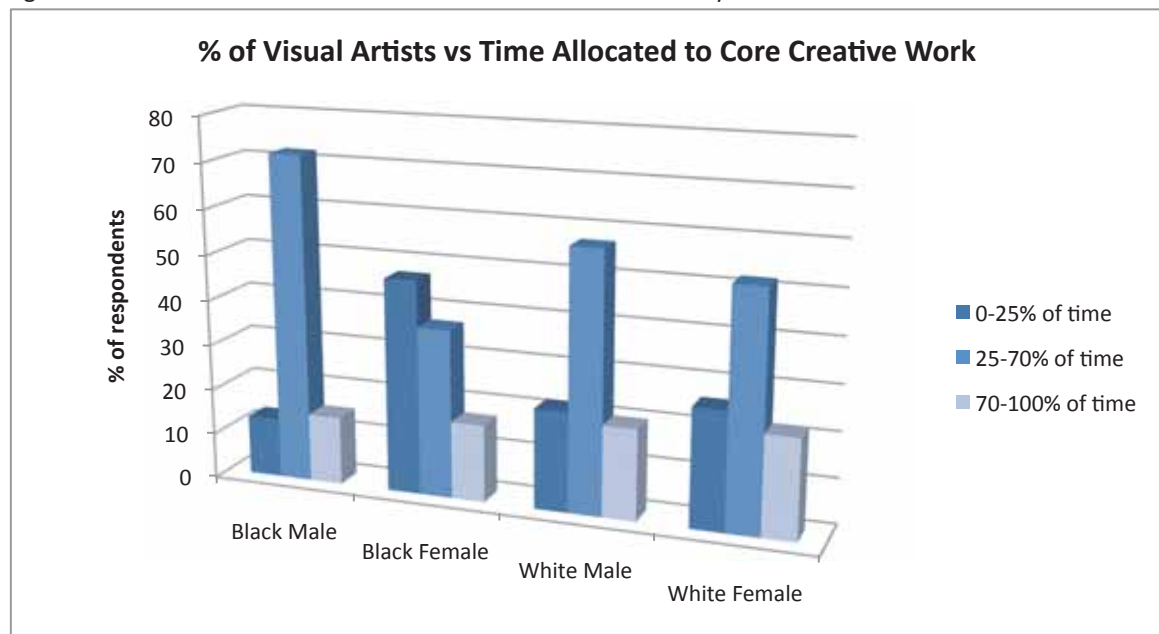
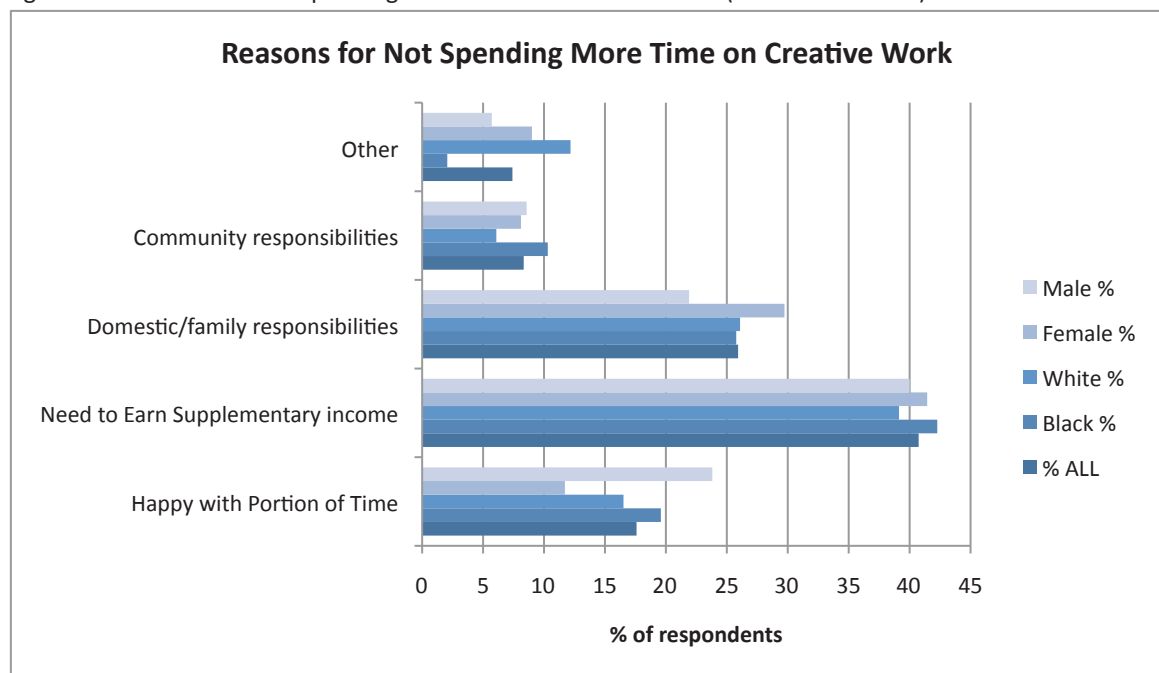


Table 27: Percentage of Time Spent on Different Activities Across Different Groups

Activity	Average Percentages				
	ALL %	Female %	Male %	Black %	White %
Producing own artwork and directly related activities	45	43	48	44	46
Networking	7	6	8	9	5
Other art-related work	12	13	11	12	11
Art-related Teaching	11	12	11	9	13
Voluntary work	3	2	3	4	2
Studying	6	7	6	9	5
Non arts related work	16	18	14	14	18
TOTAL	100	100	100	100	100

Figure 62: Reasons for Not Spending More Time on Creative Work (Race and Gender)



Visual artists organise their work time differently to people in more conventional employment situations, evidenced by the fact that though the number of hours worked per week is similar to that of the general population, the working week extends to six or seven days for the majority of artists, as indicated in the following tables.

Table 28: Artists Working Week

	N	%
Less than 5 day working week	21	9
5 day working week	70	29
6 day working week	97	40
7 day working week	55	23
TOTAL	243	100

5.5 Market-Related Issues

This section is concerned with how artists perceive the market for their work and how they engage with the real or imagined market for their work. In contrast to other industries, where the distribution and retail of product is often quite removed from the origination and manufacture of that product, the survey results demonstrate the extent to which artists in the South African context have to get involved in the marketing of their work in various and complex ways.

Most Significant Contexts for Selling Work and Most Important Markets

While the majority of artists (48%) of artists see local galleries as being the primary context for selling their work, a significant portion (20%) regard direct sale from their studios as being the most important context for selling. This proportion increases to 30% when secondary contexts for selling work are considered. Across both primary and secondary contexts, selling work through commissions represents a small but consistently significant context for selling work. International galleries, websites and markets/festivals all represent significant secondary contexts, with black artists more likely to sell from their studios and through market/festival contexts and white artists more likely to sell through websites and commissions.

Figure 63: Artists Primary Context for Selling Work

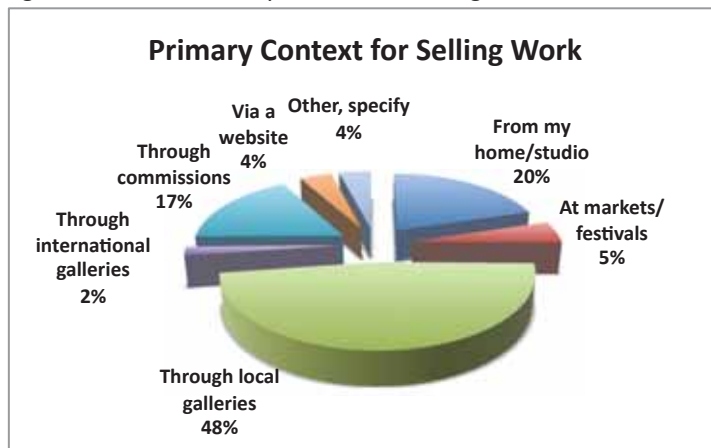


Figure 64: Artists Secondary Context for Selling Work



Most artists see their primary market as being local in scope, with only 11% according primacy to international markets. National and international markets outside of Africa become substantially more important as secondary markets. Unsurprisingly – given the limited consumption base on the rest of the continent – the rest of the continent is not seen as a significant market for the work of South African artists. Just under a third of artists perceive tourists as a target market for their work.

Figure 65: Artists Primary Market: Geography

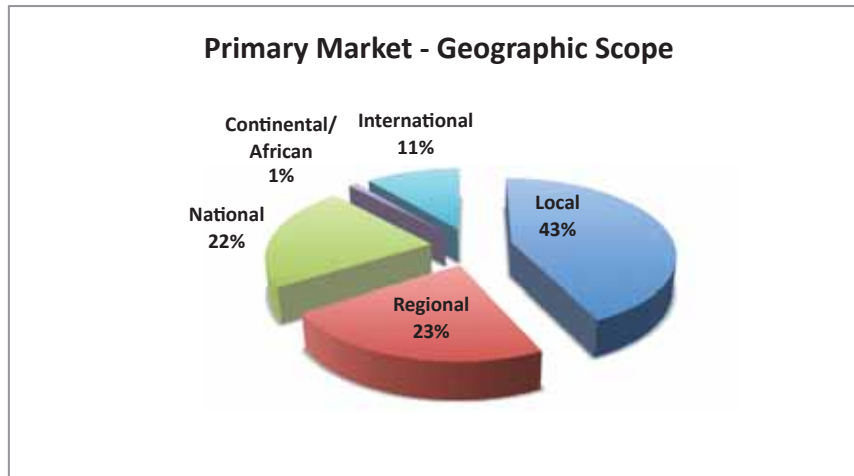
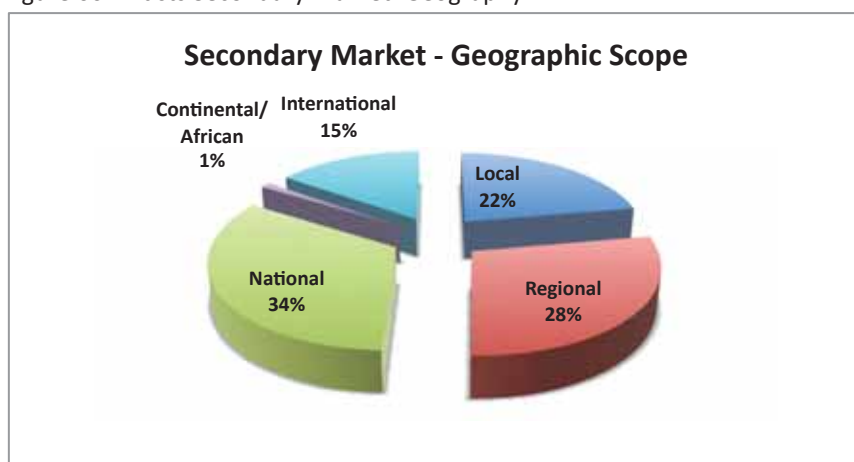


Figure 66: Artists Secondary Market: Geography



Marketing, Promotion and Working with Galleries

Gallerists and dealers have traditionally represented the most important external resource that artists can draw on in the promotion of their work. Gallerists and dealers play a significant role in addressing the organisational and financial demands of providing space, organising and publicising exhibitions, administration and the marketing and selling of artwork, leaving artists with more time to focus on the core activity of producing work. Gallerists and dealers invest substantial time, energy and money in cultivating networks of demand and patronage – this is the key resource or service that they provide to artists.

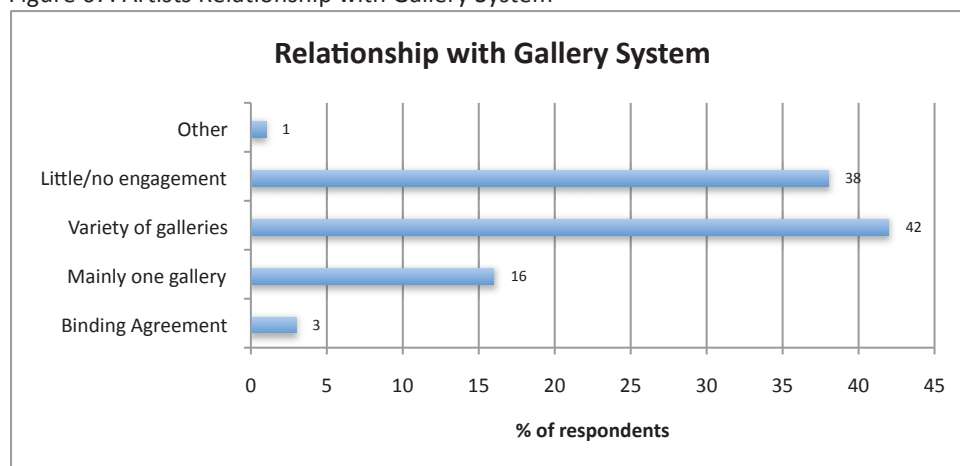
The relations between artists and gallerists are invariably complex and do not conform to conventional business relationships between suppliers and retailers in other sectors. These relationships are seldom reduced to writing, and generally involve an interweaving of the personal and the professional – with gallerists often providing a mixture of financial support, encouragement and a general sounding board for the ‘stable’ of artists that they work with. Unsurprisingly, these relationships can also be volatile, and can end badly. There are currently no industry mechanisms for resolving disputes between artists and dealers, and artists are generally constrained from pursuing disputes through legal recourse due to the financial implications of such action.

In the South African context only a very small proportion of artists have a binding agreement with a single gallerist/dealer. Such agreements represent an important form of patronage

for artists, where galleries, in exchange for primary rights to sell the work of a particular artist, provide various kinds of support to artists, which may include the addressing of production costs, living expenses and so on. Only 3% of the surveyed artists fall into this category – partly a function of the fact that very few galleries in the South Africa are in a financial position to invest in this form of patronage. A further 16% of artists show their work primarily at one gallery, though are free to also show their work elsewhere. The majority (42%) show their work at a variety of galleries, and a large proportion indicate (38%) that they have little or no engagement with galleries. Finding a dealer or gallerist to represent them was indicated as the most important professional development need by 21% of artists – the second most significant primary need registered after ‘learning how to market myself more effectively’.

International comparators suggest that South African artists have lower rates of representation by galleries than is the case internationally. In the Bonnar/Kennlyside survey of Scottish artists, 27% of all artists indicated being represented by a gallery or dealer – though it is not clear from the study what the nature of these agreements are. In the Australian study 12% indicated that their work is handled by an agent or gallerist in all circumstances and a further 28% indicated that this was the case some of the time. The Morris Hargreaves McIntyre study of the UK art market found that 28% of artists were represented by a dealer, agent or gallerist.

Figure 67: Artists Relationship with Gallery System



This trend is also reflected in the importance that artists attach to different methods of marketing their work. The majority (50%) of artists perceive networking and word of mouth as being the most important channel through which their work is marketed and promoted; only 30% regard agents/gallerists as being the most important channel for the marketing of their work. The importance of on-line methods of marketing artwork are reflected in the large number of artists who indicate this as the second most important method for marketing work.

Figure 68: Artists Primary Method for Marketing Own Work

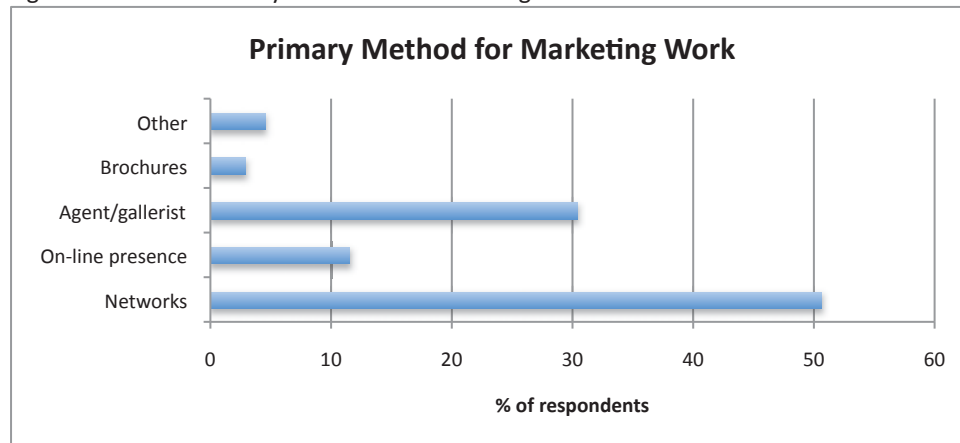
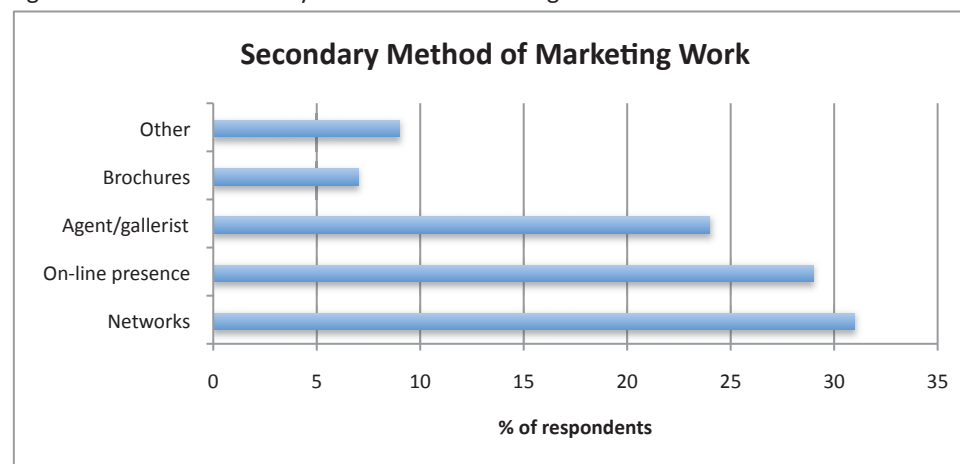


Figure 69: Artists Secondary Method for Marketing Own Work



Most artists sell work in the R1000 – R5000 and R5000 – R20 000 price range, with only 8% of the sample usually selling work for more than R20 000. The commissions charged by galleries are a perennial issue for artists world-wide, and are substantially higher than the commissions or fees charged by agents operating in other areas of the arts. This is largely a function of the substantial costs (overheads, space, publicity, etc) associated with the exhibiting and promoting of artists work. Commissions charged by South African galleries are consistent with international trends – slightly lower on aggregate than the commissions noted by Scottish artists.

Figure 70: Average Selling Price of Artwork

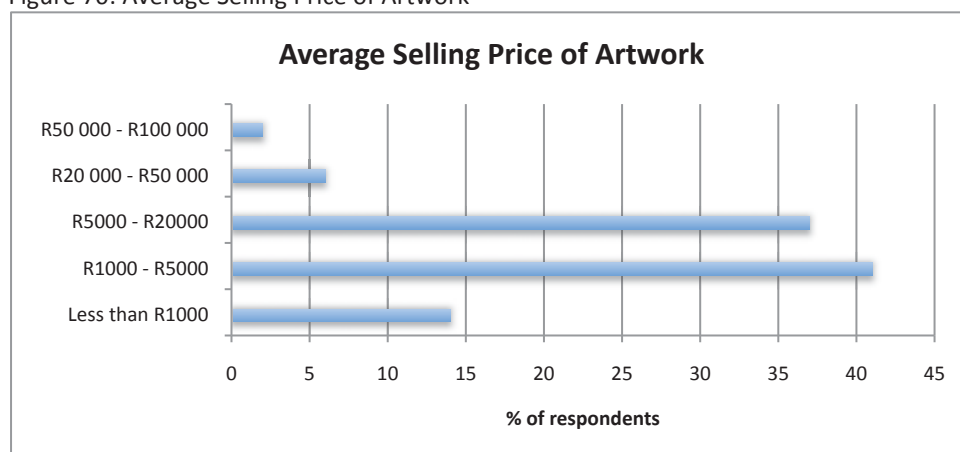
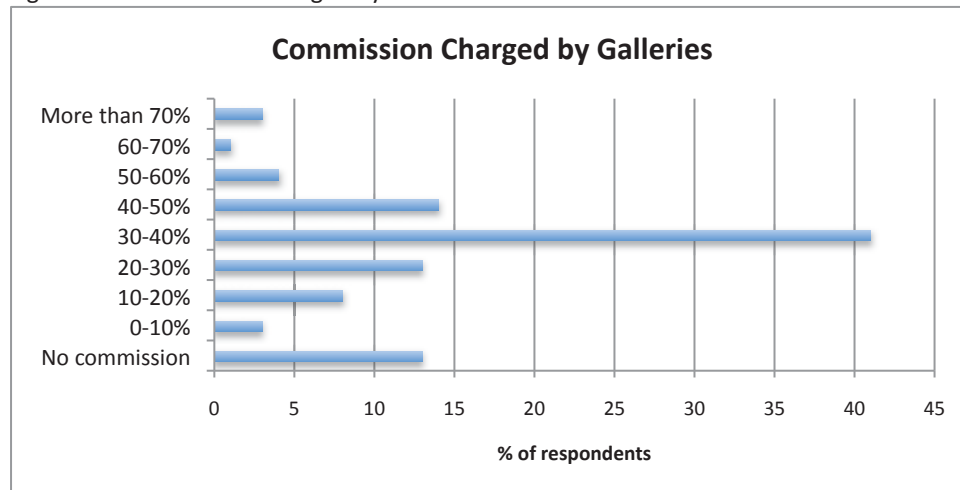
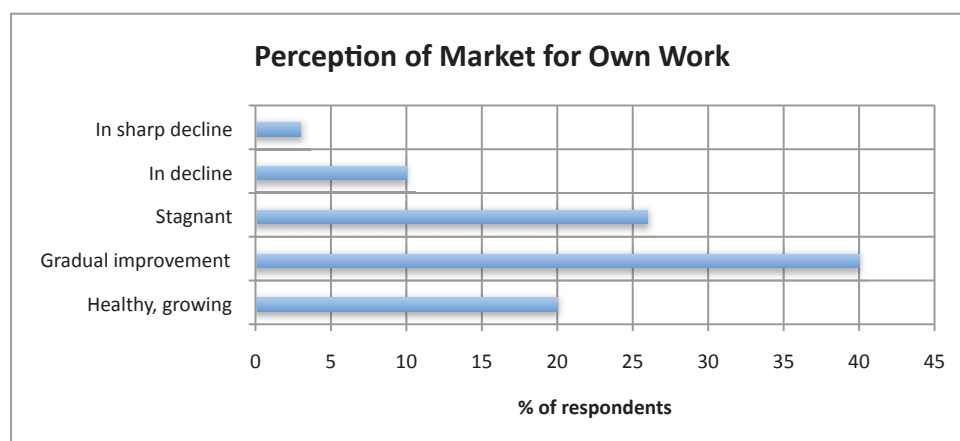


Figure 71: Commission Charged by Galleries



The majority of artists perceive the market for their work as being on a positive incline – 40% see gradual improvement and 20% regard the market for their work as ‘healthy/growing’. This is surprising, given that the survey was conducted during a period marked by an international recession whose effects have been strongly felt within the local economy.

Figure 72: Perception of Market for Own Work



Overall, South African artists may be said to play a more active role in the marketing of their own work – a consequence of what would appear to be a smaller pool of galleries, dealers and market platforms able to effectively perform this function than is the case with their counterparts in other parts of the world.

5.6 Economic Position and Circumstances

International studies show that the earnings of visual artists are generally low, by comparison both to other workers in the creative industries, and even more so when compared to other professions demanding similar levels of training and professional development.

The Throsby/Hollister study shows visual artists as among the lowest earners among creative professionals (by comparison to workers in music, dance, theatre, literature, craft):

the only creative professionals to earn less than visual artists on the basis of median income are craft practitioners. A second equally concerning trend noted in the Australian study, are the low levels of real growth in artist income over time – during the fifteen year period in which similar surveys have been done in Australia, the growth in income levels of comparable non-arts occupations have significantly outstripped income growth among artists, which have remained more or less constant. It remains to be seen from subsequent research whether this is also the case in the South African context.

The visual arts is also a profession which is characterised by greater degrees of income disparity than is the case with most other creatives – a small number of high-earning artists contrasted against a large group of low earners. One of the signal consequences of the (comparatively speaking) low levels of earning and the informality of artists work circumstances, is that the majority of artists are unable to afford the various forms of personal and work-related protection that most professions take for granted – medical aid, insurance and provision for retirement.

Mean and Median Income

This pattern is borne out in the South African context, most evident in the difference between mean and median income. While the average income of artists is just under R150 000 (i.e. mean income), 50% of the sample reported income of R90 000 and below (the median). Though the mean/average values are important for understanding the economic impact of the industry as a whole, the median/midpoint values are more instructive as a basis for understanding the economic position of the majority of artists. Income disparities among visual artists in the South African context are more marked than in, for example, Australia – In South Africa, the median income of artists is 60% of the mean value, in Australia it is only 78% (Throsby & Hollister 2004: 104).

This is partly attributable to the fairly dramatic income disparity on the basis of (particularly) race and (to a lesser degree) gender in the South African context, as indicated in the table below (though it should be noted that within each group the disparity between mean and median is consistently around 60%, though is less marked among women at around 67%). Across race groups, women earn between 70% and 78% of what their male counterparts earn. A straight comparison on the basis of gender however shows earnings between men and women being equal – a function of a large group of low-earning black male artists moderating the higher earnings of white male artists (noting that the great majority of black artists are men). Among other things, this confirms the importance of considering the implications of *both* race and gender across all areas of the report.

Table 29: Artists Annual Income by Race and Gender – Mean, Median and Minimum/Maximum Values

	Black Male	Black Female	White Male	White Female	ALL
N	71	30	47	81	232
mean	95 876	67 669	229 870	180 007	149 809
p25	32 000	19 400	65 500	60 000	41 000
median	60 000	45 250	145 000	120 000	90 000
min	800	400	18 500	5 000	400
max	800 000	440 000	2 000 000	1 785 467	2 000 000
median as % of mean	63%	67%	63%	67%	60%

51% of artists foresee their income increasing in the next year, 27% foresee a decrease and 32% see their incoming remaining about the same.

Factors Impacting on Income

Race, Gender, Location

There are also substantial variations in regional income levels, with artists from the Gauteng, KwaZulu Natal and the Western Cape earning substantially more than artists from the more rural provinces, as shown below:

Table 30: Artists Annual Income by Province – Mean, Median and Minimum/Maximum Values (2008)

	N	mean	p25	median	median as % of mean
Gauteng	66	151 998	50 000	95 000	63%
Western Cape	57	166 972	42 800	90 000	54%
Kwazulu Natal	46	180 293	40 000	95 500	53%
Free State & EC	34	95 250	30 000	70 750	74%
Other provinces	40	91 861	10 000	41 000	45%

The data suggests that while the mean/average earnings of artists in the provinces with major metros (and therefore industry clusters) is dramatically higher than in the other provinces, the disparity in the economic situation of the **majority** of artists (though still significant) is not as great, as reflected in the median income values (though one should note the extreme variance between mean and median values in the most rural 'Other provinces' category). A comparison of the above two tables demonstrates that race (and to a lesser degree, gender) are more powerful determinants of general economic success than location is for the majority of artists. This is graphically illustrated in the following two charts - in the race/gender chart there is a fluctuation in **both** median and mean values, whereas in the locational chart, this fluctuation is markedly less pronounced for median values (in red):

Figure 73: Annual Income: Race and Gender

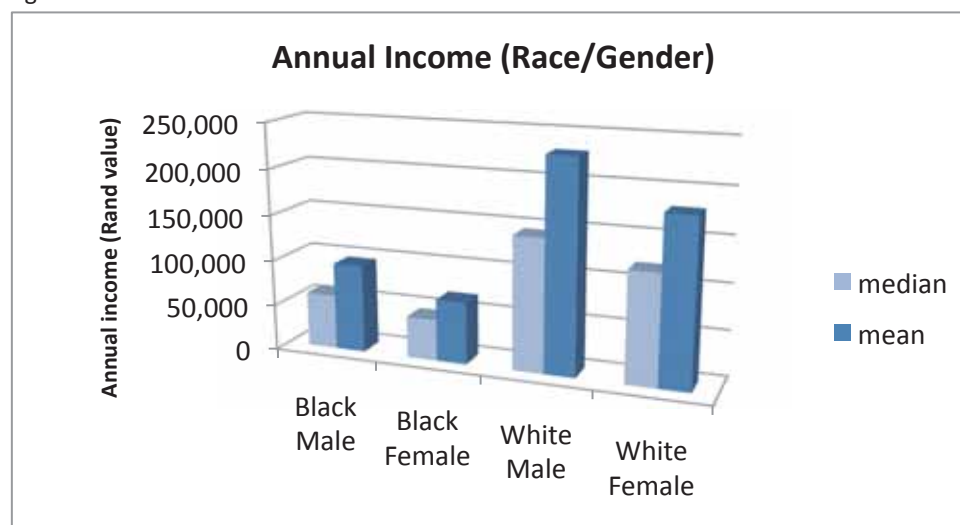
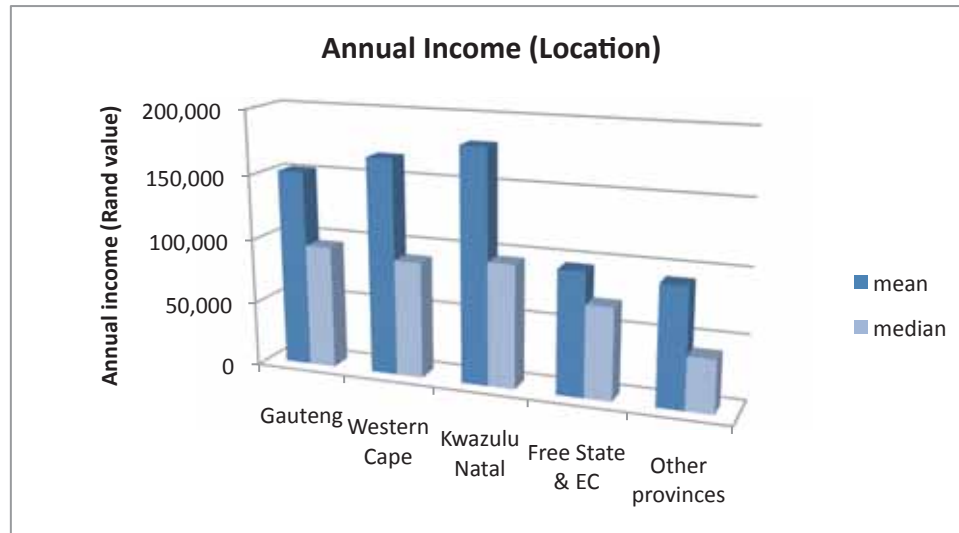


Figure 74: Annual Income vs Location

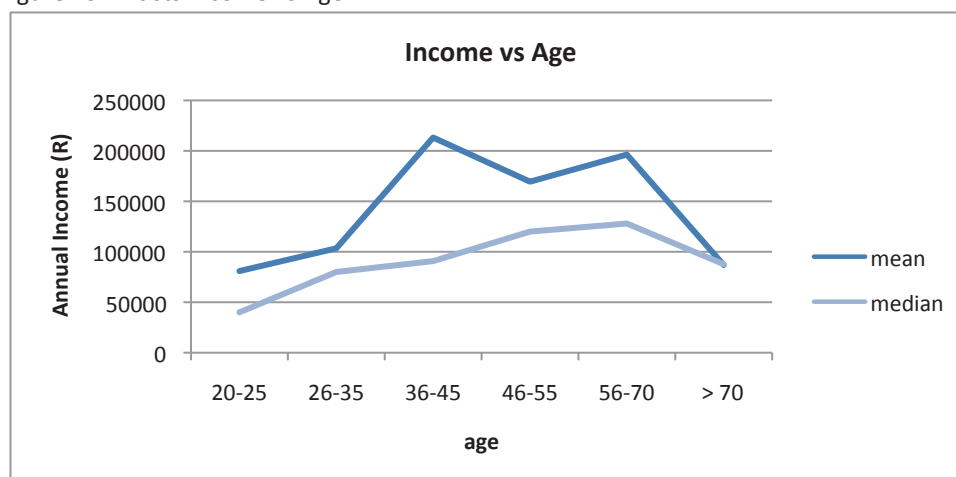


Age and Division of Time

There are also significant differences in income according to age, as well as according to the proportions of their time that respondents devote to the visual arts. Unsurprisingly, income inclines according to age, with a rapid incline in average income in the 36-45 age range, which accords with the general data on age referenced in section 3.1, and the income jump from being an emergent/unknown artist to being an artist recognised in the marketplace.

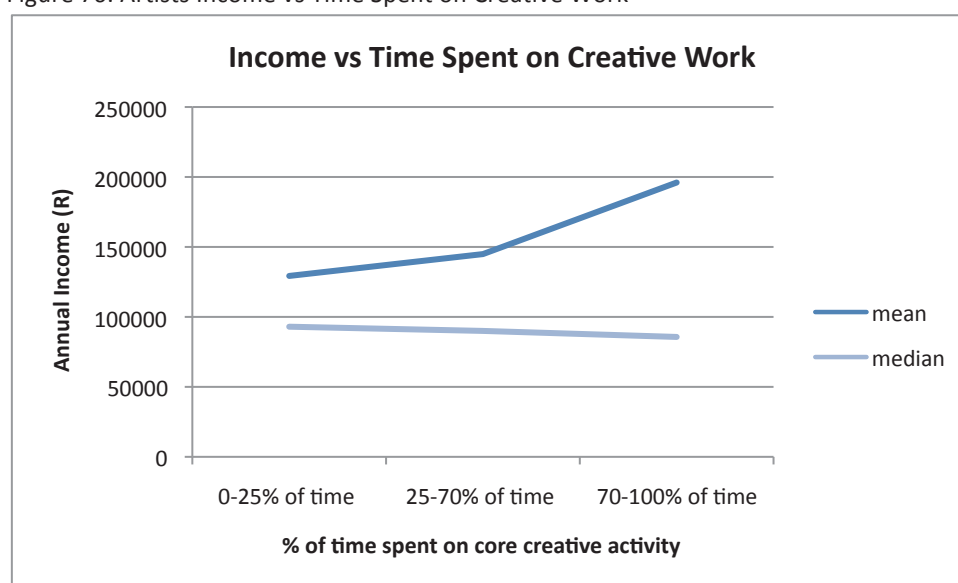
The general contrast in the curves for mean and median income is instructive. For most artists (the red median line), income steadily inclines during the course of their working lives, with a slight dip for artists over 70. For artists in the 36-45 age range there is a sharp incline in average income (the blue line) which then drops in the subsequent age ranges. This is a point at which a relatively small group of artists in this age range get 'discovered' and are suddenly 'making it' in the market - and earning substantially more money than the majority of artists in this age range (the red line). This data suggests that this phenomenon is then moderated substantially in the 46-55 age group and older age groups, where there is a less significant disparity between mean and median income of artists, and a steady increase in the income of most artists.

Figure 75: Artists Income vs Age



The data also shows an interesting trend when one considers the mean/average and median income of artists in relation to the amount of time that artists are able to devote to the primary activity of creating work. For most artists (represented by the **median**/red line), income actually declines the more artists devote time to producing artwork – clearly one of the many reasons why the majority of artists engage in a variety of other activities to support themselves. The **average** income figures (represented by the blue line) however show a substantial incline for artists who devote the majority of their time to their creative work – a function of the fact that the small number of artists who earn a substantial income are particularly densely clustered in this group, which in turn only constitutes 19% of the overall sample. This reinforces the findings from section 6.4 (division of time) – that a very large number of artists are obliged to devote substantial amounts of time to earning supplementary income through other art-related and non-art related activities.

Figure 76: Artists Income vs Time Spent on Creative Work

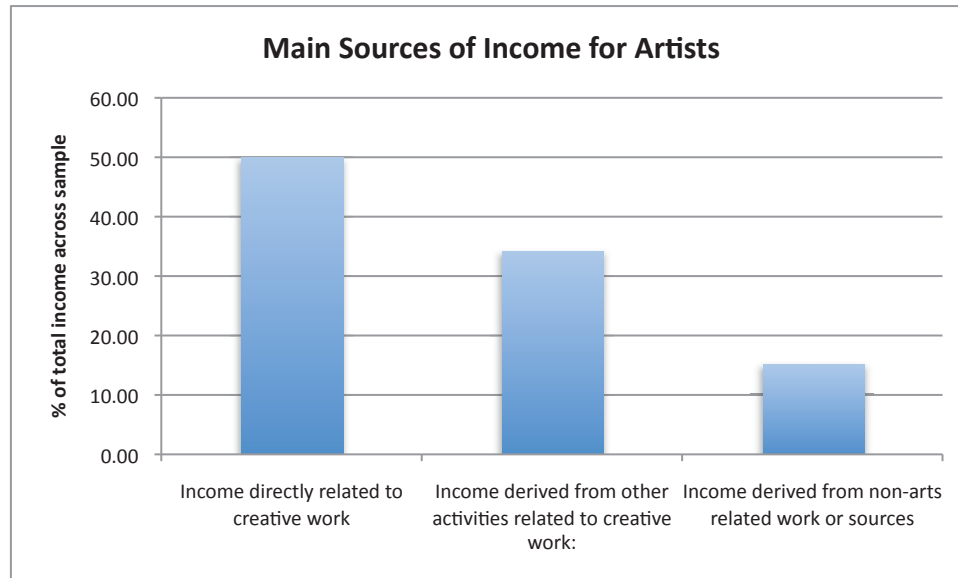


Sources of Income

Sources of income for artists correspond to a significant degree to the diversification of activities and organisation of time across their creative work, arts related work and non-arts related work, noted in section 4 of this report.

Income from activities directly related to creative work was the most significant general source of income across the sample, accounting for 50% of total income generated by artists – as opposed to 34,5% of income from arts related activities and only 15,5% of income being generated through non-arts related work or sources. Comparison with the Australian study suggests that South African artists have less diverse sources of income and rely more heavily on income from their creative work than their international counterparts – Australian artists generating on average only 43% of overall income from creative work, 25% from other arts related work and 32% from non-arts related work (Throsby & Hollister 2004: 45). Median values from the Australian study also show that the majority of artists in fact earn only 13,5% of their income their creative work (compared to 27% and 60% for arts-related and non-arts related work respectively) – while it has not been possible to extract median values from the South African data, it seems likely that there is a similar disparity between average and median income from different sources in the South African context.

Figure 77: Main Sources of Income for Artists



At a more detailed level, the contrast between the numbers of artists that derive their income from particular sources and the proportion of overall income across the sample reveals some interesting trends:

- While the source of income that the greatest number of artists derive some form of economic benefit from is private sales (67.6% of the sampled artists) more actual income was generated from sales through galleries across the sample (19.5% of all income vs only 15.5% for private sales), though only 49.5% of the sampled artists generate income from this source. This suggests that while private sales represents a very significant vehicle for most artists, selling through the gallery system generates substantially more income for a smaller group of artists that are able to achieve some form of representation or exposure through the gallery system.
- The results throw into sharp relief the importance of teaching as a source of income for artists, the single largest source of income across the sample (19.5% of all income) – though only 39% of the sampled artists derive income through this route.
- Other important sources of income include the provision of arts-related products or services (13% of all income and 14.8% of all artists), income from work outside the sector (9% of all income and 19% of all artists) and fees from private commissions (8% of all income shared among 28.6% of all artists)
- The data also suggests that artists generally derive very little income from external public or private sector funding or sponsorship, with the most significant sources of income from these sources being international funding and individual patronage. International funding does however represent the second largest average source of income for the very small proportion of artists that manage to secure it.
- The activities that have the highest rate of financial return for individual artists – on average - are from the provision of art-related products and services (14.8% of artists each earning an average of R133 351 in 2008 from this source), international funding (1.9% of artists each earning an average of R82 250 from this source), teaching in the arts (39% of artists each earning an average of R75 559 from this source), and income from work outside the sector (19% of artists each earning an average of R70 594 from this source).

Figure 79: Percentage of Artists Deriving Income from Different Sources

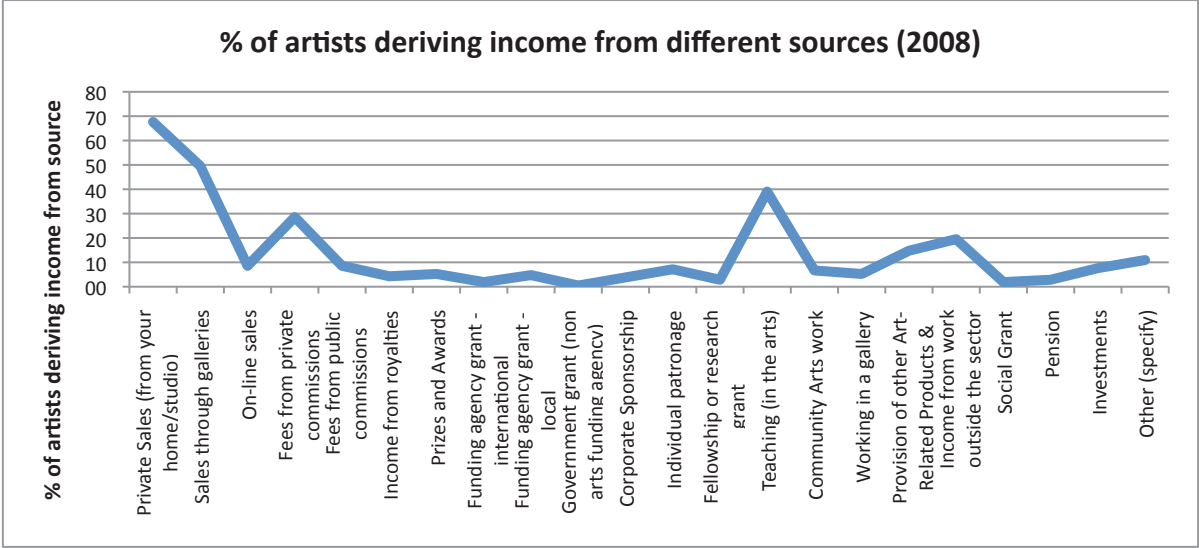


Figure 80: Percentage of ALL Income Derived from Different Sources Across Sample

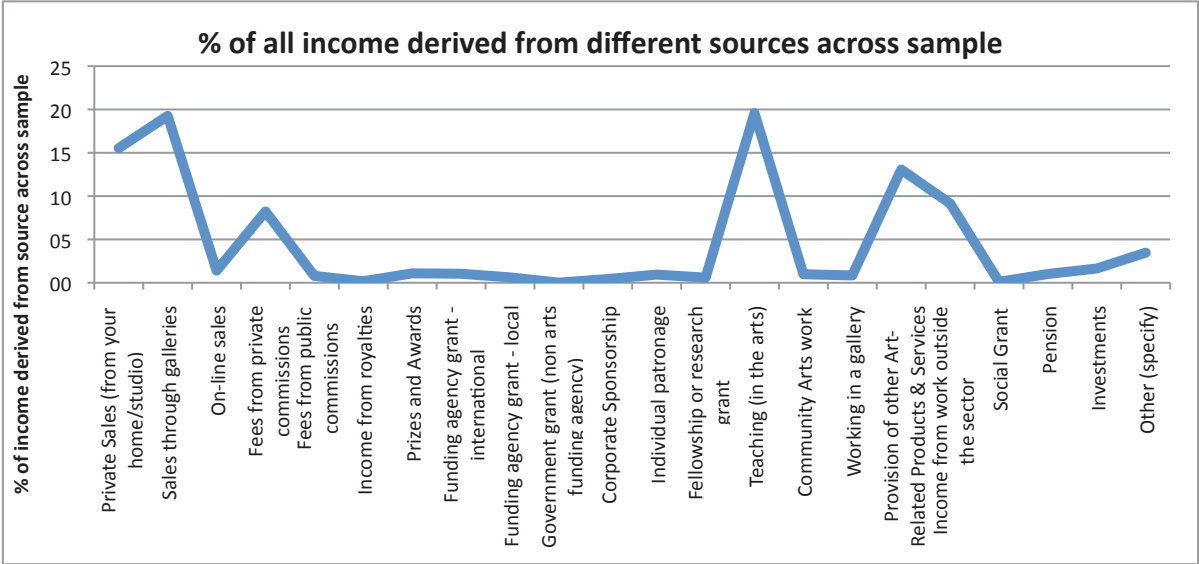


Table 31: Respondents income from different sources (2008)

	N	% artists generating income from this source	mean	Total income across all respondents (R)	% of all income across sample
Income directly related to creative work				15,856,998	50,13
Private Sales (from your home/studio)	142	67,6	34,618	4,915,816	15,54
Sales through galleries	104	49,5	58,594	6,093,774	19,26
On-line sales	18	8,6	24,583	442,500	1,40
Fees from private commissions	60	28,6	43,401	2,604,030	8,23
Fees from public commissions	18	8,6	13,868	249,620	0,79
Income from royalties	9	4,3	6,157	55,413	0,18
Prizes and Awards	11	5,2	31,226	343,485	1,09
Funding agency grant - international	4	1,9	82,250	329,000	1,04
Funding agency grant - local	10	4,8	19,630	196,300	0,62
Government grant (non arts funding agency)	1	0,5	5,000	5,000	0,02
Corporate Sponsorship	8	3,8	17,113	136,900	0,43
Individual patronage	15	7,1	19,837	297,560	0,94
Fellowship or research grant	6	2,9	31,267	187,600	0,59
Income derived from other activities related to creative work:				10,908,973	34,48
Teaching (in the arts)	82	39,0	75,559	6,195,862	19,59
Community Arts work	14	6,7	22,227	311,180	0,98
Working in a gallery	11	5,2	24,368	268,050	0,85
Provision of other Art-Related Products & Services	31	14,8	133,35 1	4,133,881	13,07
Income derived from non-arts related work or sources:				4,868,923	15,39
Income from work outside the sector	41	19,5	70,594	2,894,340	9,15
Social Grant	4	1,9	8,680	34,720	0,11
Pension	6	2,9	53,380	320,280	1,01
Investments	16	7,6	32,549	520,783	1,65
Other (specify)	23	11,0	47,774	1,098,800	3,47
TOTAL INCOME (across sample)				31,634,893	100

Expenditure, Assets and Debts

Mean and median annual expenditure across all groups is as follows:

Table 32: Artists Annual Expenditure – Mean, Median and Minimum/Maximum Values

N	234
mean	72 313
p25	12 000
median	29 900
min	100
max	2 100 000

The most common types of work-related expenditure recorded by respondents were materials (97% of all artists), equipment (55,7%), travel costs (52,4%), work premises (47%) and exhibition costs (43,8%). Labour was the most costly area of expenditure, with those artists reporting expenditure in this area (only 23% of the group) spending on average R46 607 on this cost item per annum. Materials were the second biggest average expense (R20 074) for respondents, though account for the largest amount of expenditure by artists as a group (30% of all expenditure across all respondents), owing to the large proportion of artists that spend in this area.

Table 33: Respondents expenditure across different cost areas

Expenditure Item	N	% of artists incurring expenditure in this area	Mean expenditure	Total expenditure across all respondents (R)	as % of all expenditure
Materials	203	96,7	20074	4075016	28,89
Work premises	99	47,1	17884	1770518	12,55
Equipment	117	55,7	12495	1461911	10,36
Labour (assistant/s)	49	23,3	46607	2283723	16,19
Framing	72	34,3	9385	675685	4,79
Exhibition costs	92	43,8	10325	949926	6,73
Documentation of Work	46	21,9	3344.5	153846	1,09
Research costs	54	25,7	6175	333448	2,36
Travel costs (work-related)	110	52,4	8866	975267	6,91
Training/Professional Development	25	11,9	5786	144650	1,03
Promotion/publicity costs	37	17,6	9686	358390	2,54
Transport and Freightage	58	27,6	10453	606296	4,30
Insurance	30	14,3	5582.1	167462	1,19
Other (specify)	16	7,6	9402.6	150442	1,07
TOTAL EXPENDITURE (across sample)				14 106 580	100

The mean and median replacement value of artists' assets is R170 000 and R50 000 respectively, even more sharply reflecting the overall skew apparent in income values. Disparities according to race are more pronounced, and less pronounced on the basis of gender, as reflected in the tables below:

Table 34: Replacement Value of Assets

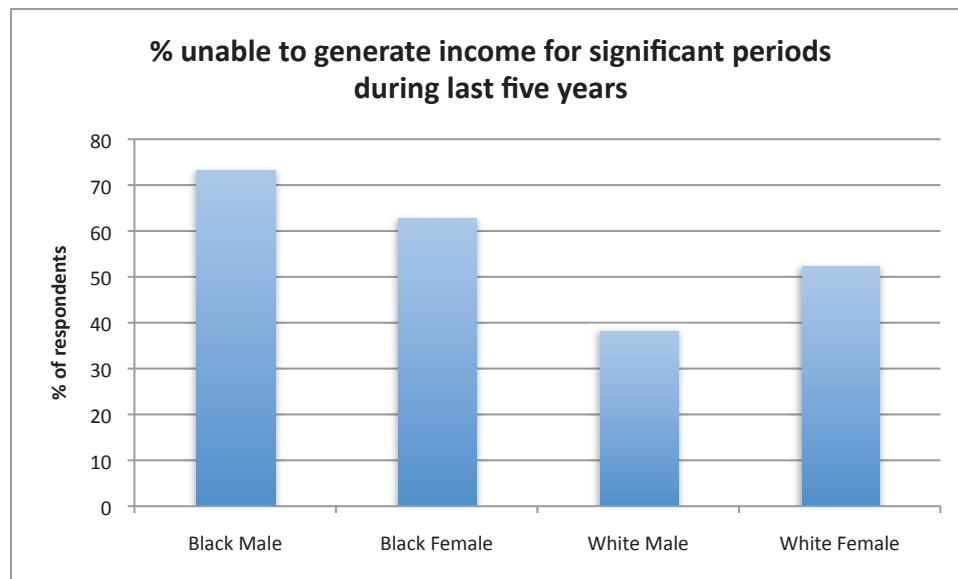
	ALL	Black	White	Male	Female
N	227	96	129	117	110
mean	169,771	52 391	256 656	171 897	167 510
p25	18,000	8 000	30 000	15 000	20 000
p50	50,000	20 000	100 000	48 000	62 500
min	200	200	4 000	500	200
max	3,000,000	500 000	3 000 000	3 000 000	2 000 000

While white artists have dramatically more assets than black artists, they also carry proportionately more debt. While the average value for artists' debt is R84 000, black artists carry significantly less debt (mean: R27 000) than their white counterparts (mean: R125 000).

Experience of Unemployment/Inability to Earn Income

57% of artists surveyed have experienced significant periods (of more than three months) during the course of the last five years when they have been unable to generate any income. This is true for 71% of black artists and 41% of white artists. In the Throsby/Hollister study, 37% of Australian artists reported periods of unemployment extending for up to 24 months over a five year period (2004: 43).

Figure 81: Percentage Artists Unable to Generate Income for Significant Periods During Last Five Years



Tax, Medical Cover, Retirement Provision and Insurance

59% of artists report paying some form of income tax – this value seems very high for a group that is largely self-employed, and where many fall below the income tax threshold, as should be clear from the median values in the preceding analysis. More nuanced exploration of this issue was not possible in the context of the questionnaire format. It is an issue that requires additional, more detailed study to understand to what extent artists are taxed on the basis of declared earnings and to what extent they may be subject to PAYE through sales, short-term contracts and part-time employment.

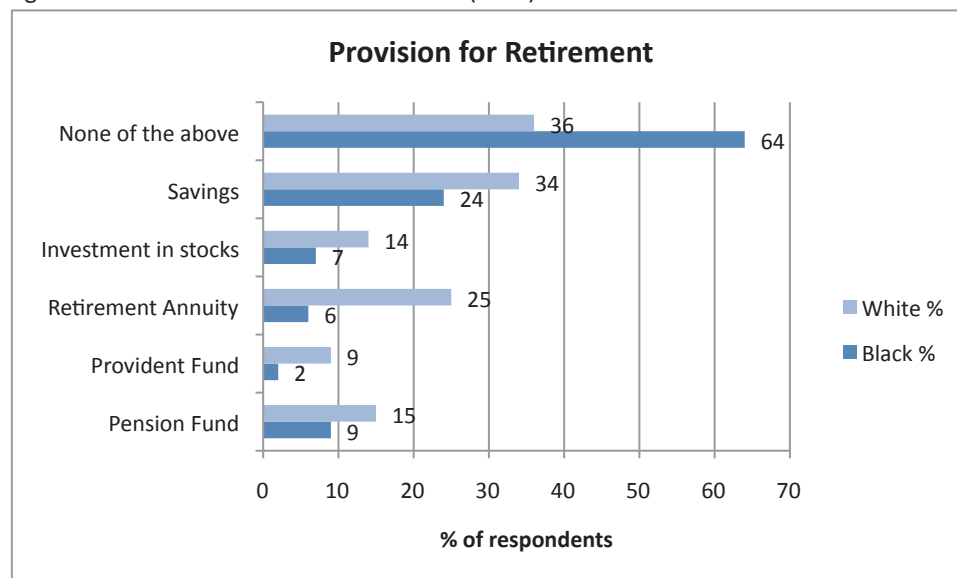
Indeed, for those who indicate that they do not pay income tax, the primary reason provided is that they earn too little/fall below the payment threshold. A small proportion (1 in 10) report that they either have not found the time or it is too much trouble/admin and additional 9% report that they are not aware of income tax issues – almost certainly mostly lying at the bottom-end of the earnings continuum.

By comparison to workers in occupations requiring similar levels of qualification, visual artists are far less likely to have the standard safety nets of the middle classes in place - provision for retirement, medical cover and insurance. This is both on account of the high cost as well as the continuous nature of costs associated with these protections, which may be difficult for artists to address on account of fluctuations in income for most artists and there being substantial periods in which a large proportion of artists are unable to generate income from their work, as evidenced in the preceding chart.

Only 37% of respondents report belonging to a medical scheme, 19% to a hospital plan and 44% report having no medical cover. This compares to 66,5% of workers classified as 'professional' in the general labour market having medical aid⁶. There are pronounced disparities based on race: 79% of black artists have no form of medical cover, with 14% belonging to a medical scheme and 7% to a hospital plan. Among white artists, 54% belong to a medical scheme and 27% to a hospital plan. 75% of those who do not have any form of cover report cost as being the main deterrent; a further 21% indicate that it is more economical for them to address medical costs as they arise and a small group (4%) indicate that they are happy with the services provided by state hospitals.

47% of all artists have made no provision for retirement (this is true of 64% of black artists). The most common form of provision is savings (reported by 29% of all respondents). Artists are generally more likely to have a retirement annuity (17%) than a pension fund (13%). These figures compare poorly to the 77,1% of workers classified as 'professional' in formal employment in the general labour market who have a pension scheme⁷. The great majority (67%) regard their provision for retirement as inadequate; 13% don't know whether or not this provision is adequate. 80% of all respondents agree that social grants from the state are inadequate for their retirement needs; 15% are not sure whether or not this will be adequate.

Figure 82: Artists Provision for Retirement (Race)

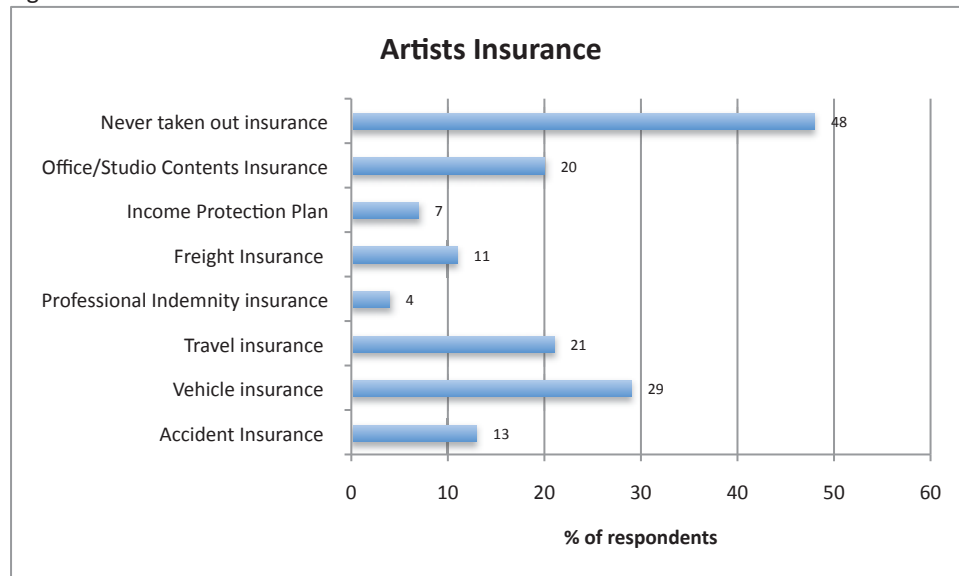


48% of artists report having never taken out any form of insurance. The most common forms of insurance for artists are vehicle insurance (29%), travel insurance (21%), and insurance on the contents of their studio/offices (20%).

⁶ Statistics South Africa. 2010. Quarterly Labour Force Survey. Statistics South Africa: Pretoria. Figures are for 2008. Section 4-24

⁷ Statistics South Africa. 2010. Quarterly Labour Force Survey. Statistics South Africa: Pretoria. Figures are for 2008. Section 4-24

Figure 83: Artists Insurance Cover



5.7 Artists as Employers

19% of artists employ others to assist them with administrative, technical or other specialist tasks. Based on the sample, one can extrapolate total employment of nearly 3000 workers in various capacities nationally, as follows:

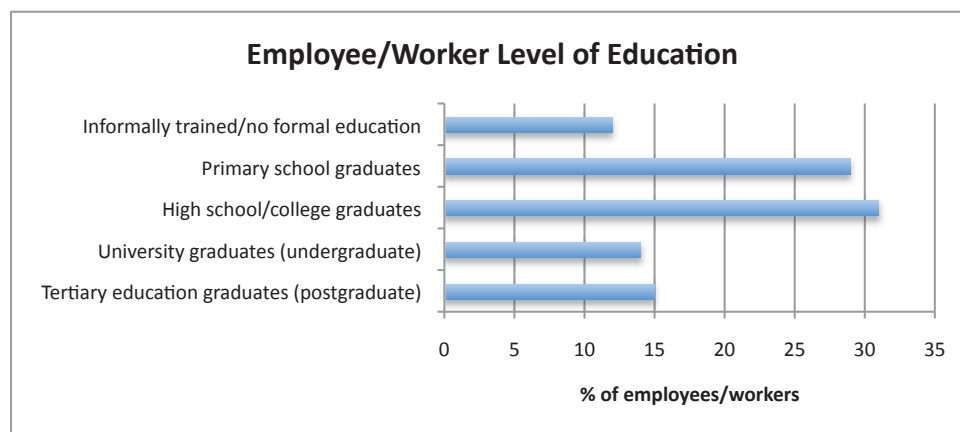
Table 35: Artists Employees/Workers – Nature of Work and Capacity

Capacity	Admin	Technical	Specialist	TOTAL
Full time	88	495	44	627
Part-time	358	358	160	875
Short term contract	270	809	204	1282
TOTAL	715	1661	407	2783

Technical staff and assistants comprise the majority of employees/workers. The majority (46%) of all artists' employees/workers are employed on a short term contract or casual basis; only 22% are employed on a full-time basis, though 30% of technical staff/assistants are employed full-time.

The majority (65%) of administrative staff are white women, and the majority of technical and specialist staff are black men (63% and 55% respectively). 60% of all staff are younger than 36. Education levels of staff are as follows:

Figure 84: Artists Employees/Workers Highest Level of Education



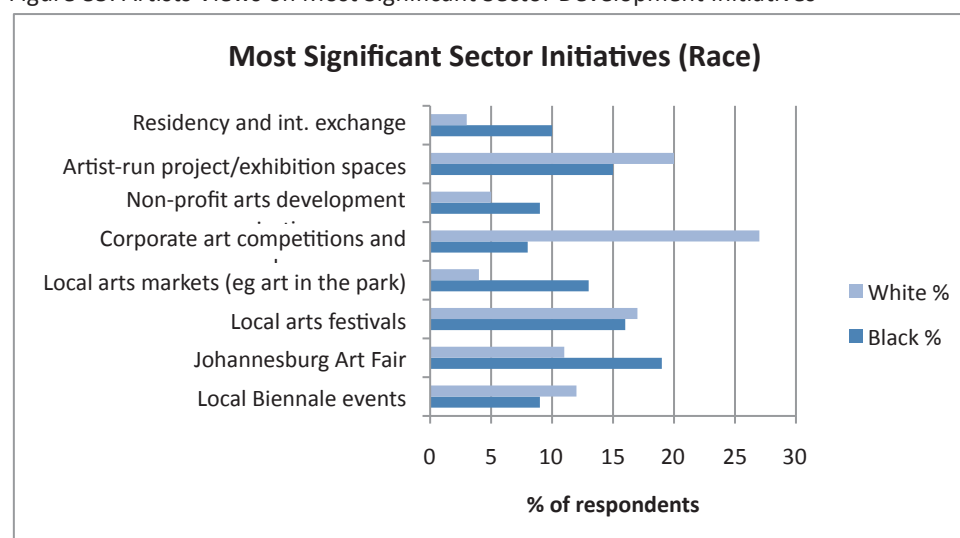
Artists are generally unable to provide employees with any benefits: 23% are able to make UIF contributions and only 4% and 2% of artists who employ others are able to provide pension/provident fund and medical aid benefits respectively. The majority (61%) of artist/employers indicate that decisions on these benefits are best left to employees.

5.8 Opportunities and Challenges

Views on Significant Sectoral Initiatives

The survey canvassed artists' views on what they saw as being the most significant initiatives for sector development. The majority view art competitions and awards programmes as playing the most important role, though there is some significant disjunction in the importance attached to different initiatives on the basis of race. Black artists – perhaps more immediately concerned with the need to sell their work than their white counterparts, view the Johannesburg Art Fair as the most important initiative and attach much less importance to art competitions and awards than their white counterparts. Black artists also attach substantially more importance to the opportunities provided through residency and international exchange programmes than their white counterparts.

Figure 85: Artists Views on Most Significant Sector Development Initiatives



Challenges and Obstacles

The following tables register the issues that concern artists the most in relation to their career/professional development. Participants were asked to rate each issue on a scale of 1-4, and select only three issues that were of 'major' concern (rated as '1'). The first table shows the average values across all ratings, the second shows the percentages of artists that rated a particular issue as major. While there is general consistency across the two tables, the second table brings into sharper focus the issues of greatest concern to artists. These may be summarised as, in order of priority:

- access to funding
- the high cost of materials and supplies
- lack of demand/buyers
- lack of industry promotion from government
- a shortage of exhibition/project opportunities locally
- and the high costs of staging an exhibition

There were some significant differences in the importance accorded to different issues on the basis of race, with white artists more concerned with the lack of demand/buyers and industry promotion from government, and black artists most concerned lack of access to funding and the high cost of materials and supplies. Both tables indicate that those issues falling under the general rubric of 'market conditions' are perceived as the greatest overall area of challenge/obstacle for respondents, with various types of 'discrimination being seen as the least significant overall.

Table 36: Obstacles to Career Development/Work: Overall Ratings

	AVG - ALL	AVG - Black	AVG - White
The high cost of....	2,2	2,17	2,21
materials and supplies	1,94	1,85	2,01
renting or acquiring space	2,1	2,01	2,01
utilities (electricity, etc)	2,4	2,33	2,47
communication (cell phone, landline, email etc)	2,32	2,13	2,5
technology	2,25	2,22	2,27
staging an exhibition	2,03	2,17	1,91
labour (assistants, staff, etc)	2,38	2,5	2,29
Market Conditions	2,14	2,16	2,12
shortage of exhibition/project opportunities - local	1,96	1,93	1,99
shortage of exhibition/project opportunities - international	2,09	2,13	2,05
lack of art -related work opportunities	1,99	1,92	2,04
lack of demand/buyers	1,9	1,93	1,87
level of competition in the industry	2,41	2,46	2,37
high commissions charged by galleries	2,11	2,24	2,02
changing trends which influence demand	2,49	2,49	2,49
Lack of access to....	2,19	2,13	2,24
skilled labour	2,48	2,46	2,49
finance	1,97	1,95	1,99
funding	1,73	1,58	1,86
raw materials	2,42	2,36	2,48
professional support/advice	2,29	2,27	2,31
residency opportunities	2,27	2,17	2,34
Regulatory environment - difficulties associated with...	2,36	2,35	2,39
SARS/tax compliance	2,41	2,41	2,43
customs/trade regulations	2,48	2,51	2,47
labour regulations	2,57	2,48	2,68
lack of professionalism within the industry	2,47	2,47	2,47
lack of internal regulation within the industry	2,42	2,42	2,44
lack of industry promotion from government	2	2,09	1,94
business licensing requirements	2,14	2,1	2,18
issues related to the freedom of expression	2,4	2,3	2,49
Personal Factors	2,48	2,48	2,51
my lack of skills or knowledge	2,57	2,53	2,62
lack of confidence in my own work	2,53	2,56	2,52
lack of support from family & friends	2,49	2,34	2,7
demands on my time at home	2,31	2,48	2,21
Discrimination	2,55	2,63	2,5
physical disability or illness	2,55	2,9	2,38
psychological condition or mental illness	2,62	2,8	2,5
racial discrimination	2,35	2,4	2,28
gender discrimination	2,54	2,6	2,48
discrimination because of my lack of qualifications	2,43	2,39	2,5
discrimination because of my nationality	2,4	2,33	2,5
discrimination because I am a person with a disability	2,94	3	2,89

Table 37: Obstacles to Career Development/Work: Major Obstacles

	ALL %	Black %	White %
The high cost of....	11	12	10
materials and supplies	27	36	20
renting or acquiring space	13	14	10
utilities (electricity, etc)	2	1	4
communication (cell phone, landline, email etc)	4	8	1
technology	8	7	9
staging an exhibition	18	14	21
labour (assistants, staff, etc)	2	2	3
Market Conditions	13	12	13
shortage of exhibition/project opportunities - local	19	21	19
shortage of exhibition/project opportunities - international	9	6	12
lack of art -related work opportunities	16	20	14
lack of demand/buyers	26	25	28
level of competition in the industry	1	2	1
high commissions charged by galleries	14	7	19
changing trends which influence demand	2	2	2
Lack of access to....	10	13	8
skilled labour	2	2	1
finance	17	16	17
funding	33	45	23
raw materials	3	4	3
professional Support/advice	5	7	4
residency opportunities	3	5	1
Regulatory environment - difficulties associated with...	5	3	5
SARS/tax compliance	2	3	2
customs/trade regulations	1	0	1
labour regulations	0	0	0
lack of professionalism within the industry	1	0	2
lack of internal regulation within the industry	1	1	1
lack of industry promotion from government	20	12	25
business licensing requirements	9	9	9
issues related to the freedom of expression	2	2	2
Personal Factors	3	1	4
my lack of skills or knowledge	0	1	0
lack of confidence in my own work	2	0	3
lack of support from family & friends	1	2	1
demands on my time at home	7	2	11
Discrimination	1	1	1
physical disability or illness	2	0	3
psychological condition or mental illness	1	0	1
racial discrimination	2	2	2
gender discrimination	0	0	0
discrimination because of my lack of qualifications	2	3	1
discrimination because of my nationality	2	3	1
discrimination because I am a person with a disability	0	0	0

Professional Development Needs

Respondents views on professional development needs were largely consistent across groups, with learning how to market oneself most frequently noted as the most significant need (30%), followed by 'finding a gallerist to represent me/show my work' (21%) and 'opportunities for research and study' (14%). This echoes the findings in the earlier section concerning the extent to which South African artists perceive themselves to be the most important promoters of their own work, as opposed to dealers and galleries. Among secondary professional development needs, the need for assistance with accessing funding is registered more sharply among black artists, with 'finding a gallerist to represent me show my work' together with 'the accessing of international opportunities' being identified as the most significant secondary needs across all groups.

Figure 86: Artists Views on Primary Professional Development Needs

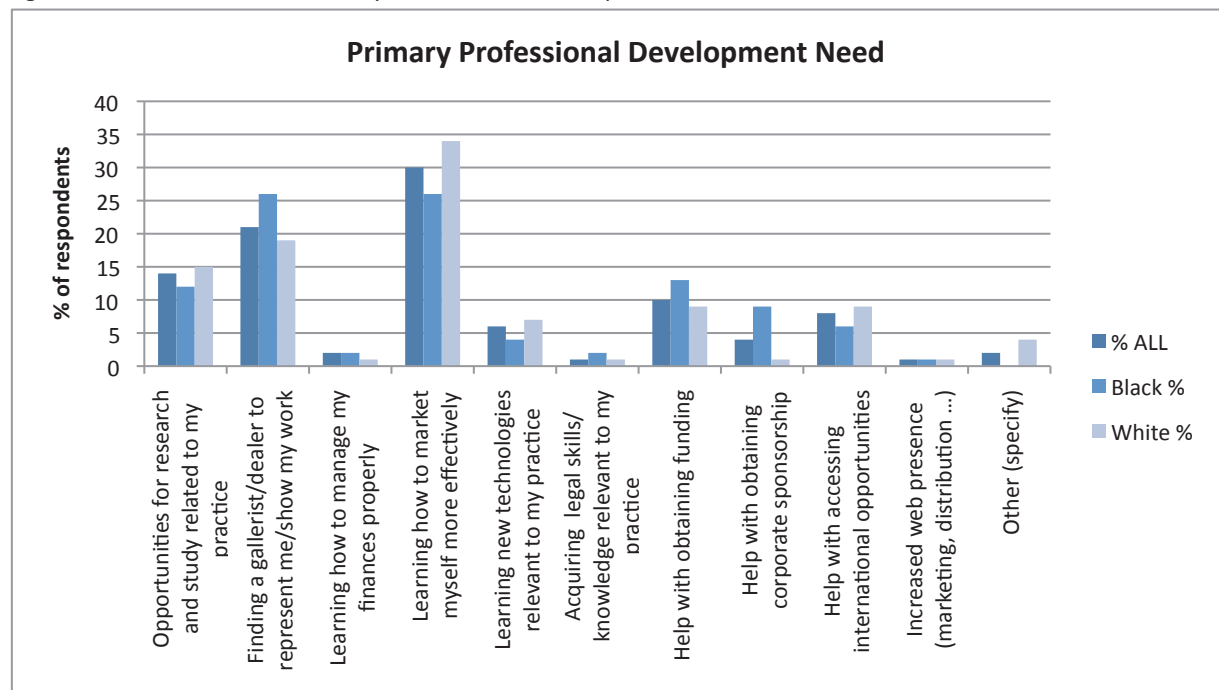
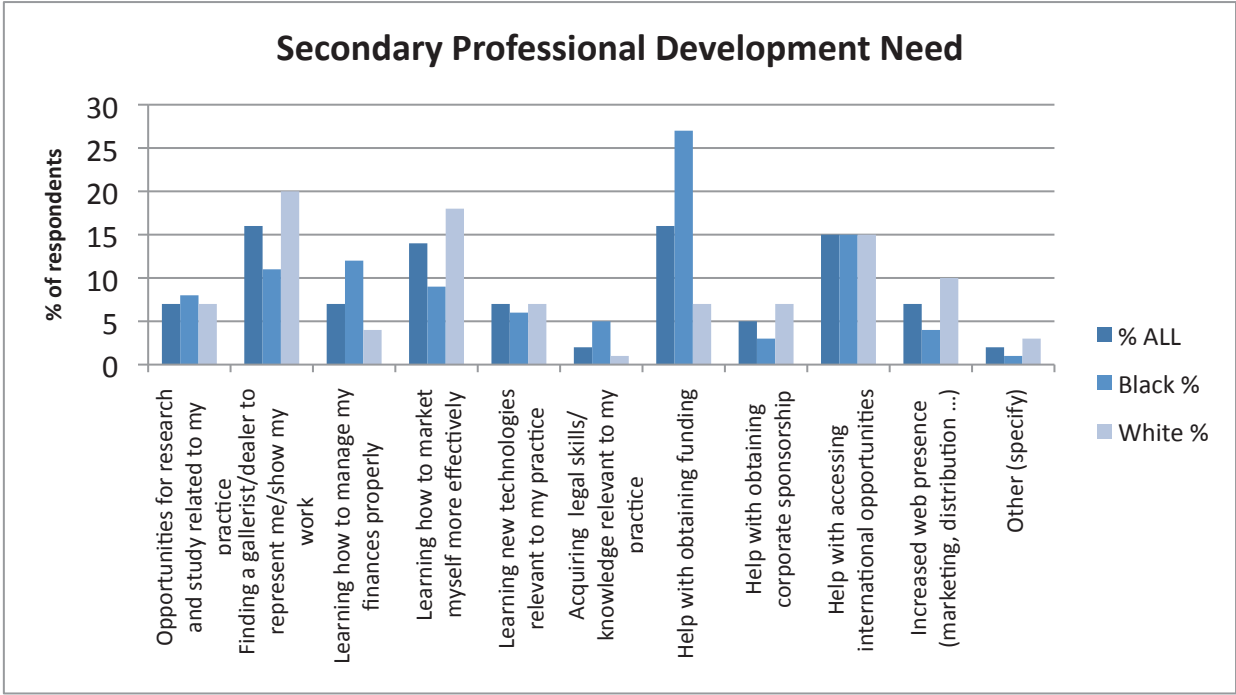


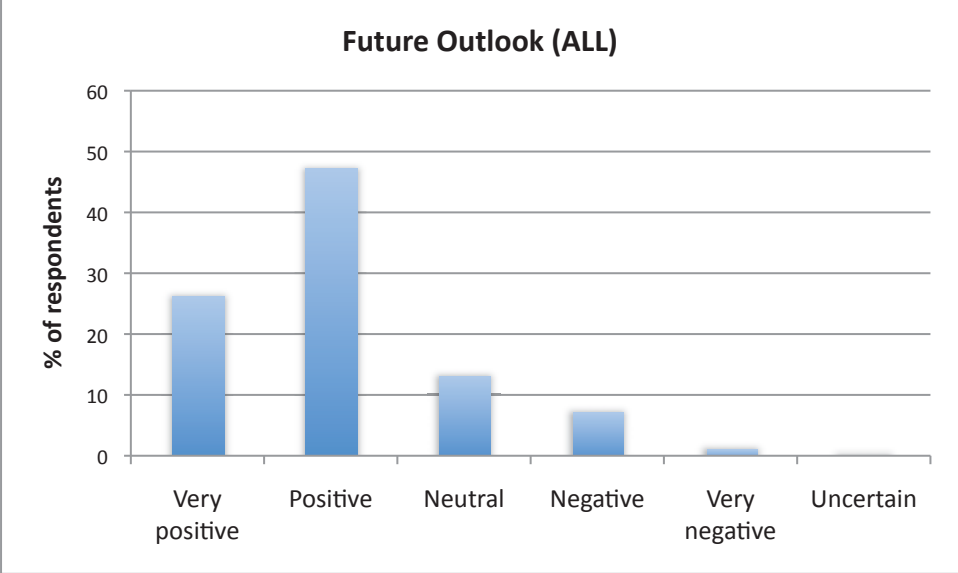
Figure 87: Artists Views on Secondary Professional Development Needs



Future Outlook

In spite of the economic circumstances of the majority of artists, and the needs and challenges noted here, artists across all groups are surprisingly optimistic about their future in the sector. The great majority indicate that they are either positive (48%) or very positive (27%) about their prospects – an indication of the extent to which the ability of artists to sustain their practice relies on a degree of passion and commitment.

Figure 88: Artists Future Outlook



5.8 Funding and Finance for Artists

38% of the surveyed artists have applied for funding during the course of the last three years. (47% black; 31% white). The highest rates of application were from artists in Gauteng (54%), the lowest rates for artists from KwaZulu Natal (21%).

Reasons for not applying for funding are strongly differentiated between black and white artists. 45% of white artists who did not apply indicate that they do not require external funding for their work – only 6% of black respondents who did not apply indicated this as a reason. 33% of black respondents felt it would be pointless to apply, as they would fail to get the requested funds, with a further 26% of respondents indicating their lack of experience in writing proposals as being a primary determining factor. Western Cape and Gauteng respondents were most likely to cite that they had no need for funding as an explanation for not applying, whereas artists from KwaZulu Natal were most likely to feel that it would be pointless to apply for funding.

The following table shows which funding agencies/sources were targeted by artists during the course of the past three years – percentages reflect the both the proportion of all respondents to the survey that had applied to a particular source the proportion of the overall sample that were successful during the last three year, as well the success rate of those who applied, expressed as a percentage.

Table 38: Numbers of Artists Applying for Particular Sources of Funding and Success Rates (2006-9)

	No. Who Applied	No. who applied as % of ALL respondents	No. Successful	% success rate as a % of ALL respondents	% success rate as a % of respondents who applied
National Arts Council	44	18,0	28	11,4	63,6
National Lottery	6	2,4	2	0,8	33,3
Department of Arts and Culture	23	9,4	6	2,4	26,1
Provincial government	10	4,1	3	1,2	30,0
Local government	4	1,6	2	0,8	50,0
Business Arts South Africa	5	2,0	2	0,8	40,0
Arts and Culture Trust	7	2,9	1	0,4	14,3
International Arts Funding Body	12	4,9	8	3,3	66,7
Private Foundation	18	7,3	9	3,7	50,0
Corporate sponsorship	11	4,5	6	2,4	54,5
Corporate funding	11	4,5	5	2,0	45,5
Patron	4	1,6	3	1,2	75,0
Arts organisation	11	4,5	8	3,3	72,7

The most popular targets for funding applications were the National Arts Council and government, followed by private foundations, corporate sources, arts organisations and international funding bodies.

The overall success rate for submissions across all funders for those who applied for funding was 50%. Only 34% of artists who applied indicated that they did not receive funding at all. Success rates were highest for requests made to arts organisations, patrons, the National Arts Council (NAC) and international funding bodies. Rates were lowest for the Arts and Culture Trust (ACT), the National Lottery (the NLDTF) and government departments – in the case of the former this is probably a function of ACT having very limited funding available, in

the case of government departments this is probably a function of the fact that government departments are not normally involved in direct grant-making other than through provincial arts councils, which generally have very limited resources. In the case of the Lottery, grants are not normally awarded to individual artists, but to organisations.

Black artists were more likely to apply to the National Arts Council and government sources (with an overall 35% success rate), whereas white artists were more likely to apply to international and private funding sources, and for corporate sponsorship (with an overall 65% success rate). Artists who had applied for funding were also asked to rate which of the funding sources that they had applied to they regarded as being most responsive to the needs of the visual arts sector. The results here largely echo the overall pattern of submissions made, with 37% of respondents indicating the National Arts Council, followed by arts organisations (11%) and international funding bodies (9%). Artists were also asked to rate what they thought were the most important purposes for arts funding generally and for individual artists.

Figure 89: Artists Views on Most Important Purposes for Arts Funding

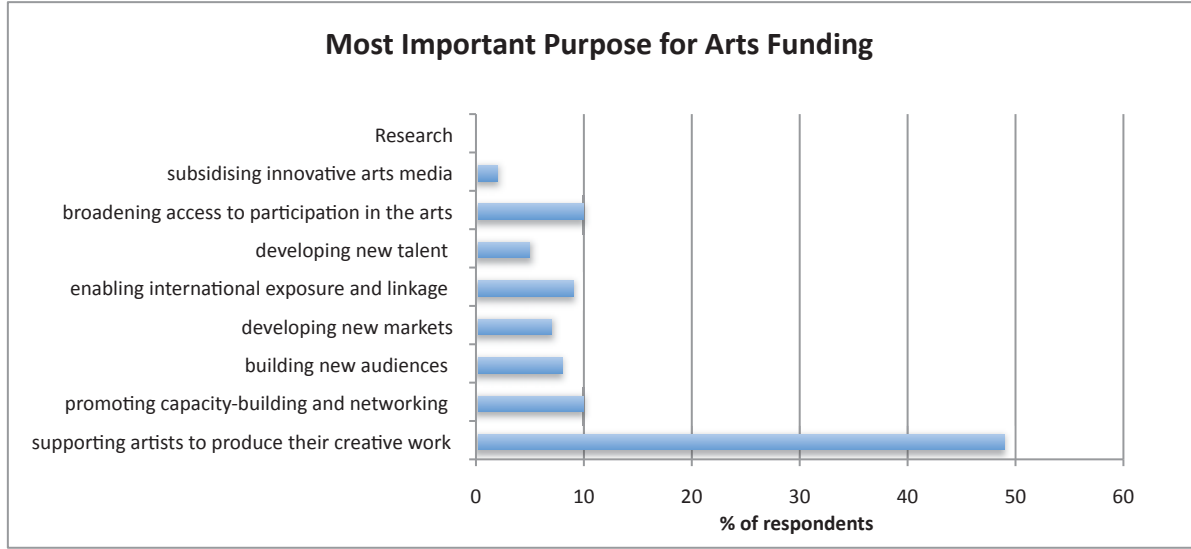


Figure 90: Artists Views on Most Important Secondary for Arts Funding

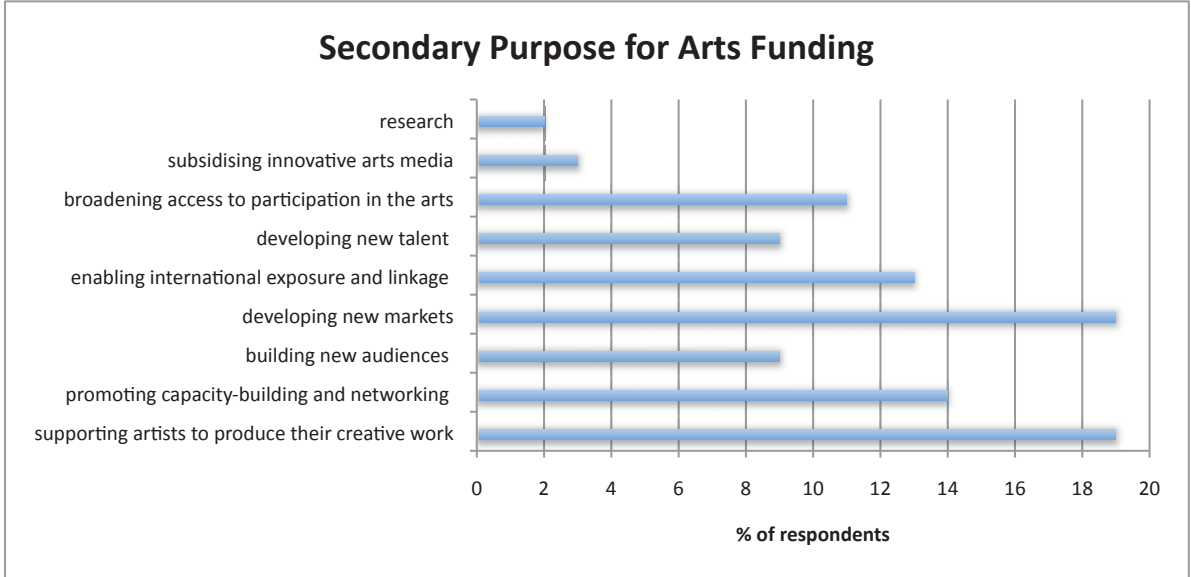
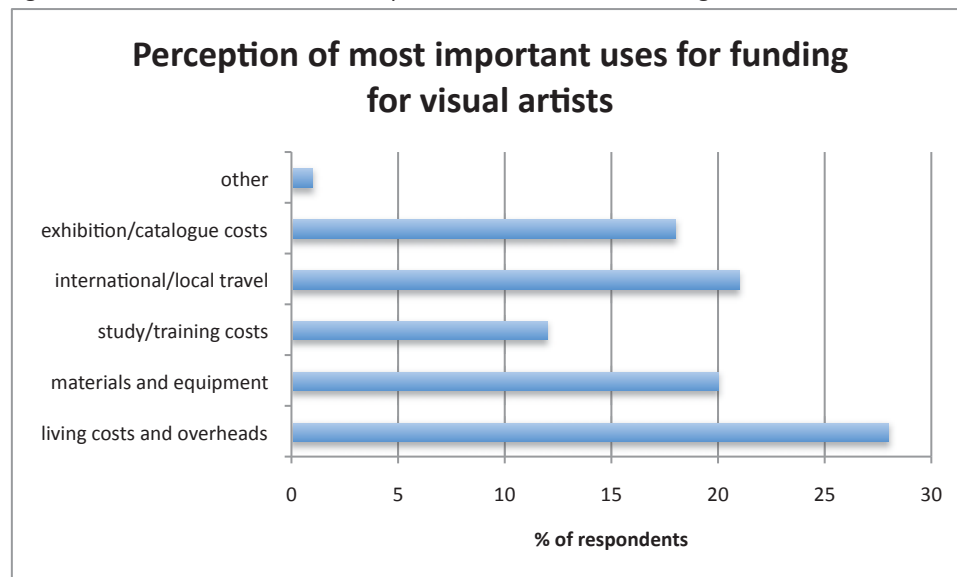


Figure 91: Artists Views on Most Important Uses for Arts Funding



21% of respondents indicated that they had applied for loans from a bank during the course of the past three years. 46% indicated that they had no need for loan finance, 21% indicated that it would be pointless to apply as they would fail to get approval. 94% of white artists that applied for loan finance were successful, and only 53% of black artists. 26% of respondents indicated that they had received a loan from an informal source (family, friend, etc).

5.10 Policy and Regulatory Framework for Artists

All of the broad policy objectives articulated in the White Paper for Arts, Culture and Heritage relating to the sector have implications for visual artists as a distinct group within the sector. Those related to audience and market development, infrastructure, human resource development and funding are addressed in the relevant sections of this report. This section of the report is primarily concerned with the Department's commitment to securing 'the rights and status of artists' through "encouraging the creation of optimum conditions in which artists may practice their art, and enjoy their right to freedom of expression in a relatively secure working environment and with the same protection enjoyed by other workers"⁸. In this regard the White Paper contemplates a review of copyright legislation and "other Acts relating to Labour relations, taxation and social security" in relation to the "particular working conditions of artists".

The phraseology of 'the rights and status of artists' references the 1980 United Nations *Recommendation on the Rights and Status of the Artist*⁹, which encourages member states to institute a wide range of interventions in support of artists, while acknowledging that these interventions would need to be adapted or moderated in relation to the particular means available to individual member states, as well with due consideration to the particular local circumstances of the society and cultural economy of each member state. The Recommendation, which was subsequently reviewed and reaffirmed at a 1997 *World Congress on the Implementation of the Recommendation Concerning the Status of the*

⁸ Department of Arts, Culture, Science and Technology. 1996. White Paper on Arts, Culture and Heritage. DACST: Pretoria. Clauses 73-74

⁹ UNESCO. 1980. Recommendation on the Rights and Status of the Artist. UNESCO: Paris.

*Artist*¹⁰, has become an important point of reference internationally for policy interventions relating specifically to artists. Again, many of the provisions in the recommendation relate to issues which are addressed elsewhere in this report (funding of artists, infrastructure development, public demand for work, measures to stimulate consumption, education and training and so on). Additional matters which the Recommendation brings into focus are the following:

- *Copyright and Artist Resale Rights* as measures aimed at protecting artists economic rights in their work and promoting their capacity to fully exploit these rights.
- *Tax incentives and relief measures* for artists as measures which take into account the often irregular and limited nature of artists income.
- Supporting the formation and activity of professional organisations and mechanisms representing the interests of artists with regard both to policy development and collective bargaining with regard to remuneration and the working conditions of artists.
- Protecting and ensuring the *Freedom of Expression* of artists

The country that has instituted the most comprehensive framework for the implementation of the *Recommendation* is probably Canada, where specific legislation on the Rights and Status of the Artist has been introduced at both a national/federal level, as well as at a provincial level. Most other developed countries have sought to incorporate aspects of the recommendation within the existing policy and legislative regimes of those countries. The current position with regard to each of these issues in the South African context is discussed in what follows, with reference to international comparators in various areas.

5.9.1 The Protection and Regulation of Artists Moral and Economic Rights: Copyright, Resale Rights and Exhibition Payments

As noted in the analysis of artists income, income associated with the exploitation of copyright currently represents a minimal source of revenue for artists, with only 4,3% of the sample reporting revenue from this source, which accounted for 0,18% of total revenue reported by artists in the 2008/9 financial year. The amount collected through artists individual efforts, extrapolated to the total population, would be in the region of R1.2 million. When questioned specifically about copyright issues in relation to their work:

- 11% of artists indicated (erroneously) that they did not believe that they have copyright over work that they produce and sell to others, 9% indicated that they did not know
- 79% indicated that they had never received payment for the reproduction of artworks or royalties on writing work, with 11% indicating 'once or twice a year', 6% indicated that they received such payments frequently but that this was not a significant source of income, and 4% indicated that they received frequent payments which represented a significant source of income.
- 24% indicated that they had at one point or another assigned copyright in a work of art or piece of writing to someone else (5% were unsure as to whether or not this was the case)
- 52% of those that had assigned copyright to someone else indicated that they were required to do so in order to secure a commission or contract, and 30% indicated that copyright had been assigned in the context of undertaking work for a business or company.

¹⁰ UNESCO. 1997. Final Declaration: World Congress on the Implementation of the Recommendation Concerning the Status of the Artist. UNESCO: Paris.

- 1 in 4 artists reported having copyright in their work infringed. 53% group reported taking no action against this infringement; 20% of this group reported taking unsuccessful action against this infringement; 27% of the group reported successful action.
- 26% of the total sample reported having their moral rights infringed. 36% of this group reported not being acknowledged as the creator of the work; a further 36% reported their work being damaged or destroyed; 21% reported that their work had been altered

While the research instrument did not allow for in-depth qualitative consideration of these issues, these findings suggest that there are significant problems both with regard to artists protecting their rights in their work, and having any capacity to systematically exploit these rights. In what follows, the South African regulatory framework addressing these issues is analysed, international comparators considered and a set of recommendations for intervention with regard to copyright and related rights proposed.

Copyright Collection

South Africa is a signatory to the *Berne Convention for the Protection of Literary and Artistic Works*. The World Intellectual Property Organisation (WIPO), a specialised agency of the United Nations, oversees and monitors the implementation of this Convention among member states. The Convention requires that all member states institute legislative measures to protect both the moral and economic rights of artists in relation to their creative outputs. In South Africa, these provisions have been effected through the Copyright Act, Act 98 of 1978, which recognises the ownership of copyright in “artistic works” and entrenches the rights of artists with regard to the usage, modification and reproduction of their work, regardless of who owns that work at a particular moment in time. Policy and legislative responsibility for copyright-related issues is located within the Department of Trade and Industry’s Intellectual Property Rights directorate.

An article in WIPO Magazine, Sept. 2009 provides a model for collective management for audio-visual products, which is promoted by dti as an example for the visual arts sector¹¹. Industry sectors are encouraged to register collective organisations in which individual artists’ work rights are vested. The collective transacts on behalf of the artists, protects the rights of members and provides guidelines and bargaining procedures for payment of royalties to the artists.

The experience of agencies elsewhere in the world suggests that there is substantial benefit to be accrued to artists through collective management of copyright. The Australian agency that administers copyright payments for artists, Viscopy, reported distributing A\$1.54 million (over R10 million) to members in the 2009 financial year, with an average payment of A\$673 (circa R4 500) per member artist.¹² Thus, the collection of payments associated with the reproduction or usage of artworks has the potential to create modest but significant additional revenue streams for a significant number of artists, substantially in excess of what South African artists are currently able to generate in terms of both value and numbers of benefitting artists. This is arguably largely a consequence of there presently being no organised body in place that is able to collectively administer these rights. The absence of such an organised body also creates significant difficulties for anyone wishing to make use of

¹¹ Saffon, C, Chantrier, C. 2009. Collective management of audiovisual works: facing the challenges, then and now. WIPO Magazine. Vol 5/2009. Online available:

http://www.wipo.int/wipo_magazine/en/2009/05/article_0007.html. Retrieved 10/03/10

¹² Viscopy. 2009. Annual Report 2008/9. Viscopy: New South Wales, Australia.

an artists work (for example, publishers or advertisers), as they are (at least theoretically) obliged to track down the actual artist and negotiate licensing agreements on an individual basis. Low levels of understanding of the legal and financial implications of copyright and the absence of any standardised rates schedules in the industry - both add to the difficulties of these negotiations, and inevitably render artists vulnerable in such dealings.

Of the various sectors forming the creative and cultural industries, creators' rights are managed collectively in South Africa only in the music and publishing industries. In the music industry, a number of organisations play a role in administering copyright associated with the public performance, reproduction and broadcast of music. These organisations are led by the Southern African Music Rights Organisation (SAMRO), and include the SA Recording Rights Association (SARRAL) and the National Organisation for Reproduction Rights in Music in Southern Africa (NORM).

Where SAMRO, SARRAL and NORM are collecting societies for musical works, the Dramatic, Artistic and Literary Rights Organisation (DALRO) fulfils this function for literary works, and is a reproduction rights organisation (RRO). Collecting societies grant licenses for the exploitation of certain rights associated with reproducing, adapting, performing, publishing and broadcasting a literary, artistic or musical work. DALRO plays a notional role in this area for the visual arts, and has agreements in place with a wide variety of international copyright agencies to grant licenses and collect royalties in South Africa in respect of international artists on behalf of these foreign agencies. DALRO does not however represent South African artists or their heirs, either domestically or abroad, with the exception of a small number of artists' estates (including that of Irma Stern). It is therefore largely left to individual artists to protect their copyrights. The experience of DALRO and of collecting societies and RROs worldwide demonstrates that individual administration is unpractical and that only the collective administration of rights can lead to income for creative workers from the exploitation of their works.

DALRO doubts the feasibility of extending its operations to collect on behalf of South African artists, and believes that the visual arts sector will need eventually to self-organise around this issue as has happened internationally. However, there is currently a dialogue underway between the Visual Arts Network of South Africa (VANSA) and DALRO about the possibility of DALRO's providing assistance in the early stages of the collective administration of rights for visual artists.

The key issues arising identified relating to the administration of copyright payments for artists are primarily:

1. The organisational capacity to secure a broad mandate from a critical mass of artists to administer copyright on their behalf – Viscopy, after 12 years in existence, has secured membership among 42% of Australian artists. It is suggested that introducing a similar scheme in the South African context would initially require a mandate from in the region of 15-20% of the active population of full-time and part-time artists.
2. Substantial advocacy and awareness-raising to build and understanding within the artist community of such schemes – and address the inevitable concerns of artists in this regard - would be required to achieve such a figure. Securing the support and mandate of the most prominent artists in the country would be an important first step toward securing a wider mandate.
3. Such a strategy would require substantial seed funding – it estimated that a break-even point for such an agency would take a substantial period. In the case of

Viscopy, this point was initially projected as a four-year period, but finally took approximately ten years to achieve, with tapering off financial support during this period from the Commonwealth government's Department of Communications, Information Technology and the Arts (the equivalent of the national Department of Arts and Culture in the South African context).

The need for the Department to commission more detailed investigation into the feasibility of such a scheme is indicated, in consultation and collaboration with industry organisations such as SANAVA and VANSA. The latter organisation is presently undertaking a modest scoping of the issue in consultation with DALRO.

Artist Resale Rights

Artist resale rights (also known as *droite de suite*) enable artists to receive benefit from the appreciation in the value of their work over time. Artist resale rights legislation requires that artists receive a small percentage of the value of sales of their work in the secondary art market (primarily through the sale of artworks by auction houses and dealers), subsequent to the original sale of an artwork through a gallery or directly from the artist's studio. This percentage is generally on a sliding scale (between 0,25% and 4% in the European Union), based on the value of the work (the more valuable, the smaller the percentage), with a limit on the maximum royalty paid set. The Berne Convention promotes (but does not require) the introduction of legislated Artist Resale Rights among member states. Article 14^{ter} of the Convention ("‘Droit de suite’ in Works of Art and Manuscripts: 1. Right to an interest in resales; 2. Applicable law; 3. Procedure") states that:

“(1) The author, or after his death the persons or institutions authorised by national legislation, shall, with respect to original works of art and original manuscripts of writers and composers, enjoy the inalienable right to an interest in any sale of the work subsequent to the first transfer by the author of the work.

(2) The protection provided by the preceding paragraph may be claimed in a country of the Union only if legislation in the country to which the person belongs so permits, and to the extent permitted by the country where this protection is claimed.

(3) The procedure for collection and the amounts shall be matters for determination by national legislation.”¹³

Provision for this right has been introduced in a number of international contexts, and European Union states have agreed on the progressive implementation of this right in all EU member states by 2012. There is however no legislative provision for Artist Resale Rights in South Africa. While the introduction of Resale Rights has often and unsurprisingly been greeted with resistance from dealers and auction houses internationally, it has now become increasingly standard practice internationally. The recent implementation of Resale Rights legislation in both the UK (as one of the international centres of the market for visual arts) and Australia (as a country with a visual arts economy more comparable in scale to that of South Africa) representing particularly significant developments. There are a number of compelling arguments for the introduction of Artist Resale Rights in the South African context:

- As with copyright collection, it represents an important additional source of revenue for artists or their heirs/estates, and one which is (in the case of the auction market) easier to implement and monitor.

¹³ WIPO. 1886[1979]. Berne Convention for the Protection of Literary and Artistic Works. WIPO: Geneva. Accessed at: http://www.wipo.int/treaties/en/ip/berne/trtdocs_wo001.html

- Currently South African artists are unable to benefit from the appreciation in the value of their work between the primary (first sale) and subsequent sales through auction houses and dealers. In the Australian context, one of the primary motivations for the introduction of Artist Resale Rights was the substantial gulf that existed between the value of first sales of the work of aboriginal artists and the exponentially increased value of these works as they were resold through dealers or auction houses, with the artist accruing no direct benefit from this appreciation (other than through the increased value of their work over time in the primary market). In South Africa, a broadly similar argument may be applied to an older generation of both living and deceased black South African artists, whose work now circulates within the secondary market at an appreciated value.
- Artist Resale Rights provide a corrective to the inevitably weak bargaining position of particularly younger artists in relation to gallerists and collectors
- At the point at which the Australian government took the decision to implement Resale Rights legislation (2002), the Australian market auction market was valued at A\$79.2 million (circa R527 million at current exchange rates)¹⁴ – as noted in section 3 of this report, this is somewhere near the approximate value of the South African auction market currently, suggesting that there should be a basic economic feasibility to implementing such rights.

There are a number of models internationally for the implementation of Artist Resale Rights, and a legislative intervention in the South African context would require significant additional research to assess these models in detail and scope the feasibility for implementing these rights in the particular context of the South African visual arts economy. Extensive consultation with a wide range of actors in the local industry would also be required both to inform the development of a workable model, and generate industry-wide awareness and understanding of the issue – the importance of such consultation being informed by sound research and thoughtful consideration of a variety of options would be critical, in order to mitigate the likely negative response that the basic proposition might be met with from dealers and auction houses. As with the copyright collection question, careful consideration would also need to be given to the practical procedures around the administration of these rights and the organisational infrastructure required to support this. In many international contexts (the UK, for example), agencies tasked with copyright collection also take on responsibility for the administration of resale rights for artists.

Associated Issues

The amendments to copyright legislation proposed by the Intellectual Property Laws Amendment Bill, 2007 (also known as the IKS Bill), are currently the subject of vigorous debate after the dti decided to include comments by the public and other stakeholders. The proposed amendments to the Copyright Act could make provision for the registration of collecting societies through CIPRO (the dti's Company and Intellectual Property Registration Office), and in the absence of there being an industry organisation able to perform this function, government may appoint an organisation to do so.

The IKS Bill's primary purpose is however to provide copyright protection for designated indigenous or traditional works, the rights to which may be held by communities rather than individuals. Communities would be required to organise themselves in order to claim ownership of rights in cultural property and ensure the sharing of benefits in any commercial applications of this property, such as in publication, in audio-visual media and

¹⁴ Department of Communications, Information Technology and the Arts. 2004. Proposed Resale Royalty Arrangement: Discussion Paper. DCITA: New South Wales. p. 10

through advertising. But there are substantial concerns within the legal fraternity and among civil society bodies and existing collecting societies regarding the extent to which the proposed amendments to the Act will in fact achieve the purposes that they set out to perform, and one such concern is that contemporary visual artists would be prevented from using, 'quoting', or building on 'traditional' motifs without authorisation from an as yet undefined community. Even if the IKS Bill is revised to clarify the means of gaining authorisation from such communities, individuals will find it impossibly difficult to manage this process, and a collecting society will arguably be the only practical solution¹⁵.

Exhibition Payment Rights

Most notably in the UK and Canada, exhibition payment schemes have been introduced in relation to the exhibition of artists work in public venues, or publicly funded venues. In the Canadian context, an amendment was introduced into the Canadian Copyright Act to make provision for the payment of exhibition fees to artists for the showing of work in public galleries and museums. Payments are collected by the Canadian Artists Representation Copyright Collective Inc (CARCC), a collection society established and owned by the Canadian Artists' Representation/Le Front des artistes canadiens (CARFAC), an organisation representing the interests of artists in Canada. CARCC is also responsible for the collection of copyright payments and payments associated with artist resale rights, and publishes an annual schedule of fees associated with each of these rights. Artists may, if they wish, waive exhibition payment rights, and experience has shown that they are frequently placed under some pressure to do so by exhibition venues.

While such a scheme would represent an important additional revenue stream for particularly younger artists, introducing such an arrangement in the South African context would face three challenges:

- the extreme existing constraints on the budgets of public art museums and collections and independent arts organizations (outlined in section 4 of this report) would make it difficult to address such an additional cost
- the fact that no organised collective exists to administer such rights
- the likelihood of such a special interest amendment being introduced into South Africa's copyright legislation is remote in the short to medium term

With regard to the first challenge, it is proposed that the national Department should in the short term investigate the establishment of a fund – potentially administered by the National Arts Council – which both public institutions and independently curated contemporary arts projects in other public venues could claim from in order to pay artists whose work they show. This would have the potential to have a number of positive impacts:

- it would contribute immeasurably to enhancing the profile of public museums and collections among both artists and the wider visual arts community
- It would provide the department with a way in which to contribute very directly to artist livelihoods, making use of an already existing statutory instrument at its disposal (the Arts Council)

The desirability of seeking to legislate such a right is one that would require more careful consideration, as to whether this was justified by the administrative costs implicated in introducing such a provision. That the department should commission research and engage with industry bodies with regard to the establishment of a capacity for collecting rights in general, is however a very clear recommendation.

¹⁵ information and perspectives on this issue were provided by Macdonald Netshitenzhe (Department of Trade and Industry) and Monica Seeber, an independent specialist in the publishing industry

5.9.2 Tax Measures and Incentives for Artists

As noted in the survey findings, a surprisingly large proportion of artists (59%) report paying income or company tax. The Recommendation on the Rights and Status of Artists specifically encourages member states to take measures to alleviate the tax burden on artists. Within the current tax regime in South Africa, there are no tax benefits, schemes or incentives that accrue specifically to artists in general or indeed to visual artists in particular. There are general provisions (such as the thresh-hold on the payment of income tax) which apply to all South Africans, and which yield a (notional) benefit for artists at the bottom end of the income spectrum, as they would for all low-income earners.

Internationally, there are a variety of tax-related schemes, benefits and incentives specifically aimed at artists which are predicated both on the recognition of the special position that artists occupy in society, as well as the specific difficulties that attach to their economic position:

- That their overall earnings are low in relation to their levels of qualification and experience, by comparison to other professional fields that require similar levels of training
- That their income – dependant as it is on availability of short term work and the sale of work – is subject to substantial fluctuation (this is particularly true for visual artists)

Internationally, two primary approaches have been taken to addressing these issues through special provisions in the tax regimes of particular countries – straightforward tax exemption and income averaging. The most radical legislative intervention in this area is the Artists Tax Exemption introduced in Ireland in 1969, which makes provision for all income on creative work up to the value of €250 000 to be exempt from income tax, and for 50% of all income over €250 000 to be exempt. Aside from addressing concerns regarding artists livelihoods, these provisions were also aimed at attracting more creative people to Ireland. While the legislation has yielded significant benefit for many artists (the majority of claimants falling below the €10 000 per annum income bracket), it has also been widely criticised for the extent to which it benefits already wealthy artists – in 2001, over half of all exempted income was accounted for by artists earning between €500 000 and €10 000 000 per annum¹⁶. In spite of significant attempts in 2004 and more recently in 2009 to have these provisions in the Irish tax repealed, they have remained intact. Similar incentives have been introduced in other parts of the world based in part on the Irish experience, often in the context of wider place-based incentives for attracting creative people and businesses – at a state level, in Hawaii, Rhode Island and Maryland in the United States, and in the province of Quebec in Canada.¹⁷

Income averaging schemes have been introduced in a variety of national contexts, including Australia, Sweden, Netherlands, Germany and the UK to enable classes of self-employed workers to ‘average out’ their tax exposure over a number of years in order to compensate for what may often be extreme fluctuations in taxable income.

¹⁶ Visual Artists Ireland. 2010. *Artists Tax Exemption*. Accessed at: <http://visualartists.ie/advocacy/research/artists-tax-exemption/>

¹⁷ MT Auburn Associates. 2007. *Utilizing Tax Incentives to Cultivate Cultural Industries and Spur Arts-Related Development*: A report prepared for the Louisiana Office of the Lt. Governor and the Department of Culture, Recreation and Tourism. Accessed at www.crt.state.la.us/cultureconomy/2007conference/TaxPolicy.PDF

The likelihood of such incentives and schemes being instituted seems remote, given the smaller fiscal and tax base from which the country operates and the substantial complexities and costs involved in administering such schemes.

5.9.3 Regulation of Working Conditions and Collective Bargaining

As noted in the preceding parts of this section of the report, the great majority of artists are self-employed and in terms of labour legislation are treated as independent contractors. Labour legislation in South Africa applies primarily to persons who are formally employed in various capacities in terms of the Labour Relations Act no. 66 of 1995. As is the case in most countries, this legislation makes provision for collective bargaining with regard to wages, benefits and social security schemes between employers and employees through the mechanism of trade unions. Due to the fact that employer-employee relations do not apply to the greater portion of the work activities that artists are engaged in (outside of the small minority of artists who work full-time or part-time for universities, public institutions and government), the idea of unionisation presents a particular set of complexities and challenges for the visual arts sector. The primary economic relationship between gallerists and artists is not an employer/employee relationship, and there is no legislated obligation on the part of gallerists with regard to income security, the provision of benefits or social security. As noted in the survey findings it is also a relationship that is often not reduced to writing and in which gallerists have an automatically superior bargaining power. Attempts to unionise the creative workforce more generally in the South African context have had as yet unclear implications for the visual arts.

The Creative Workers Union of South Africa was formed in 2007 out of the merging of the Musicians Union of South Africa (MUSA) and Performing Artists Workers Equity (PAWE), and is formally recognised by the Congress of South African Trade Unions (COSATU) as the representative union for the creative industries. The union consists mainly of musicians and performing artists, though some attempts have been made to draw the craft sector into the ambit of the union. It has functioned primarily as a lobby group to government around specific issues – applying pressure on a variety of issues, from concerns regarding the representation of local performers in events related to the World Cup through to the casting of American performer, Jennifer Hudson, in a biopic relating to the life of Winnie Mandela. More recently, the Union has pursued – in partnership with the Department of Arts and Culture and with assistance from Old Mutual and the Department of Social Development¹⁸ – a Social Security Scheme (Seriti) which aims to address Funeral Cover, Medical Aid and Short Term Insurance for artists, with a view to introducing a Retirement/Pension Fund tailored to artists needs at a later stage.

Collective bargaining arrangements specific to the visual arts have been pursued in a variety of other national contexts, perhaps most vigorously in the Canadian context through CARFAC, under the remit of Rights and Status of the Artist legislation in that country passed in 1992 at a federal level, and progressively instituted at a provincial level subsequently. The legislation makes provision for the establishment of a Canadian Artists and Producers Professional Relations Tribunal (CAPPRT) – among other things, the Tribunal is mandated to certify professional bodies as having an exclusive collective bargaining function in relation to federal institutions, including public museums and galleries. CARFAC was certified in 1999 as the body mandated to act on behalf of visual artists with regard to what are described as

¹⁸ Cosatu Press Release, August 2010, *CWUSA Seriti Social Security for Creative Workers* accessed at: http://groups.google.com/group/cosatu-press/browse_thread/thread/fef2e0d0dc707dfa

‘scale agreements’. A scale agreement specifies the minimum terms and conditions under which producers engage the services of, or commission works from, self-employed artists in a specified sector. A certified organisation has the right to negotiate on behalf of self-employed artists within their jurisdiction on a variety of issues including the implementation of standard contracts and wage rates, as well as pensions, unemployment support, and benefits that are enjoyed by employees in other fields.¹⁹ The organisation publishes an annual fees and rates schedule which is negotiated with all federal institutions that have dealings with artists, whether in the context of exhibiting or commissioning their work or engaging their services.

5.9.4 Regulation of Expression

The principle of Freedom of Expression is entrenched in the Constitution of the Republic of South Africa. Section 16 of the Bill of Rights (Chapter 2 of the Constitution) enshrines the right to freedom of expression as a fundamental right of all South Africans.

“1. Everyone has the right to freedom of expression, which includes

- a. freedom of the press and other media;
- b. freedom to receive or impart information or ideas;
- c. freedom of artistic creativity; and
- d. academic freedom and freedom of scientific research.

3. The right in subsection (1) does not extend to

- a. propaganda for war;
- b. incitement of imminent violence; or
- c. advocacy of hatred that is based on race, ethnicity, gender or religion, and that constitutes incitement to cause harm.”

This general position is reiterated at various points in the White Paper for Arts, Culture and Heritage, and is defined in clause 9 of the White Paper in the following terms:

“Freedom of Expression: Shall ensure that all persons are free to pursue their vision of artistic creativity without interference, victimisation and censorship.”

The regulation of Freedom of Expression within the framework of the Constitution falls within the ambit of the Film and Publications Board. The Film and Publications Act no.65 of 1996 makes provision for the establishment of a Film and Publications Board (FPB), concerned with the regulation of the distribution of films and publications within the framework established under the Constitution, and the provision of consumer advice regarding the classification of films and publications. The Act elaborates on the circumstances in which sub-section 2 of the Constitution and considerations related to the protection of children may over-ride the provisions of subsection 1. The Act makes it a requirement that any film, DVD, video or computer game to be distributed within South Africa has to first be submitted to the Film and Publications Board for it to be classified. In the case of a Publication, the powers of the Board are only brought to bear if a complaint or request for the material to be examined is lodged by a member of the Public. Within the Act, the definition of a Publication includes, among a variety of other material, “any drawing, picture, illustration or painting;[...] any print, photograph, engraving or lithograph [...] any figure, carving, statue or model” (Chapter 2 of the Act; ‘Definitions’).

¹⁹ CARFAC 2010. Federal Status of the Artist Certification. Accessed at <http://www.carfac.ca/about/federal-status-of-the-artist-certification/>

The Board has the power to apply an XX or X18 rating to a Publication. An XX rating makes it illegal to exhibit or show the given Film or Publication within South Africa. An X18 regulates the distribution and display of material classified as such. An XX rating is applied in relation to the following types of material as recorded in Schedule 1 of the Act:

- “(a) child pornography
- (b) explicit violent sexual conduct
- (c) bestiality
- (d) explicit sexual conduct which degrades a person and which constitutes incitement to cause harm
- (e) the explicit infliction of, or explicit effect of, extreme violence which constitutes incitement to cause harm, or
- (f) a description of child pornography.”

Schedule 10 of the Act also makes provision for any Film or Publication that advocates or incites hatred based on religion to have an XX rating applied to it. Schedule 5 of the Act however makes specific provision for the exemption of scientific or artistic work from aspects of all of the above provisions, with the exclusion of those related to child pornography in the case of artworks:

“The XX or X18 classification shall not be applied in respect of a *bona fide* scientific, documentary, literary or, except in the case of Schedule 1(1)(a) [child pornography], an artistic publication, or any part of a publication which, judged within context, is of such a nature.”

In the post 1994 period, these legal provisions have seldom been brought to bear on the visual arts. Possibly the only case in which the powers of the Film and Publications Board have been invoked in relation to the visual arts concerned an exhibition of the work of a lecturer at Rhodes University, Mark Hipper, at the National Arts Festival in Grahamstown in 1998. Two organisations, Child Welfare and Women Against Child Abuse approached the Film and Publications Board with the request that the exhibition *Viscera* be closed down on based on the view that the work on show constituted child pornography. The Film and Publications Board ruled that the work did not constitute child pornography and refused to apply an XX classification to the work – but did require that appropriate cautionary signs be placed at the entrance to the exhibition. While there have been other incidents in the ensuing period in which demands from various quarters have been made that particular artworks not be displayed in public, these have not to date stood up to any legal scrutiny under the Constitution.

There are of course indirect ways in which freedom of expression may be interfered with – particularly through the withholding of public funding to artists, projects or organisations that are either felt to be critical of government or may be felt by public servants or politicians to be at odds with the best interests of the public. This is an area of contestation and tension that has the potential to serve as a major impediment to sector-government relations if not effectively managed from both sides. There have also more recently been concerns regarding political interference in the commissioning of public art. The recommendations attached to this report propose that the development of better practice in the commissioning of public art – and the education of public officials regarding the moral and creative rights of artists – should go some way towards addressing this kind of issue.

Section 6

Education and Training in the Visual Arts

This section is concerned with the current framework for and position of visual arts education and training in the country, analysing the impact of this position on industry growth and development, and making recommendations aimed at addressing problems in the present provision of visual arts education and training within schools, the tertiary system and the industry itself. Prior to 1994, the majority of South Africans had only the most limited access to arts education through the formal schooling system, and education and training in the arts for black South Africans relied largely on the efforts of community arts organisations and NGOs.

The critical importance of access to arts education at both a formative and more advanced levels is noted in the White Paper for Arts, Culture and Heritage in relation to three key policy objectives:

- Growing new audiences and consumers of the arts (relating primarily to the provision of arts education in schools)
- Growing future creative talent (relating primarily to the provision of arts education in high schools, FET colleges and universities)
- Addressing areas of scarce and critical skills lacking in the industry – in for example, the areas of arts administration, management and entrepreneurship (relating primarily to tertiary education and the provision of work-based training)

The core mandate for arts education lies with the National Departments for Basic Education and Higher Education respectively. The two departments were formed from the splitting of the Department of Education into two Departments in 2009. This reconfiguration of government competencies also involved the Department of Higher Education absorbing functions and responsibilities associated with industry training and the system of Sector Education and Training Authorities under the Skills Development Act from the Ministry of Labour. The two departments together are responsible for the largest single area of government expenditure, with R165 billion allocated to education in the 2010 budget speech of the Minister of Finance. Government expenditure on education is in line with the expenditure of most advanced economies, comprising between 5 and 7% of Gross Domestic Product and 18 and 22% of all government expenditure between 2002 and 2006¹.

A plethora of policy and legislation governs the operation and structure of the schooling, FET College and Tertiary Education and work-based training frameworks. The introduction of the National Qualifications Framework in the late 1990s and early 2000s sought to integrate all of these different components of the education and training system into a single system for the recognition of competencies and qualifications, aimed at ensuring that learners would be able to easily progress between different parts of the education and training system. The Qualifications Framework was constructed around three Bands – General Education and Training (including Adult Basic Education and Training), Further Education and Training and Higher Education and Training – and (originally) eight different levels at which different qualifications and units of learning would be pegged. The South African Qualifications Authority (SAQA) was tasked with the realisation of this framework, through engagement with all stakeholders in the education and training system. Each of these components of the education and training system – and their impact in the visual arts field – are considered below.

¹ Department of Education. 2009. Trends in Education: Macro-Indicators Report. Pretoria: DoE. Pp 105-7

6.1 The Schooling System

The National Department of Basic Education is responsible for the setting of national policy for education in schools, including the establishing of a common national curriculum framework for all schools. Provincial departments of education are responsible for the direct management of the schooling system at a provincial level. Umalusi is the statutory agency responsible for the quality assurance of education in schools in the General and Further Education and Training bands.

Two significant shifts occurred in education policy in the post-1994 period that are relevant for visual arts education. The first shift emerged out of policy research, which focused on the role of schools in the creation of a new kind of citizenry in the wake of decades of oppression. The 2001 “Manifesto on Values, Education and Democracy” notes the important role that the arts play in value formation and transmission, and explicitly promotes the linking up of arts practitioners with schools:

“...[I]t might be easier for well-resourced schools to integrate arts and culture education into the curriculum than poorly resourced ones. Arts and Culture education will be effective only if communities commit themselves to involving their artists and cultural workers in the formal education of their children. It has been proposed that each school have an artist-in-residence, a proposal to be assessed and implemented at district and provincial level.”

The “Values in Education: Schools-Based Research report: Opening Pathways for Dialogue” document additionally highlights the importance of arts and culture as a medium through which democratic values can be nurtured:

“There is a desperate need for creative programming at the school level – both inside and outside the classroom. Curriculum 2005 provides a framework for building creative opportunities inside the classroom. This research highlights the massive challenge that still awaits us in confronting the hierarchical and authoritarian instincts of many educators, to provide educators with the facilitation skills, leadership skills, and creativity to unleash fully the capacity of the new curriculum in the classroom. Currently educators associate “creativity” with “arts” and “sports” programming. Both of these areas need deepening and reconfiguration. *The establishment of artist in residence programmes in schools, mobilizing local artists and artisans, is strongly supported.* [emphasis added]”

The June 2002 Race and Values Programme of Action document makes reference to the intention to establish an annual celebratory arts event that would involve schools in producing creative writing, art and presentations on oral history. Additionally, an endowment to enable residencies for creative writers and artists in schools and bursaries for promising students was also contemplated, which was to be initiated in 2003. It is unclear what the current status of these proposed initiatives is.

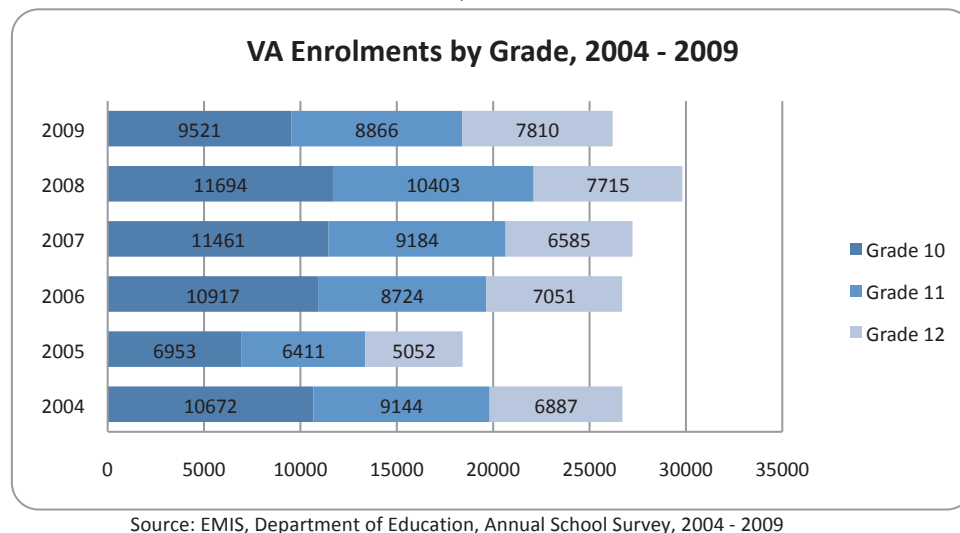
The second major shift – and the one with the greatest implications from an implementation point of view – was the adoption of Outcomes Based Education (OBE) as an approach at the level both of curriculum design and teaching and learning, and the introduction of the Arts and Culture learning area as a compulsory component of the curriculum for grades 1-9 (known as the General Education and Training Band), alongside seven other learning areas. The OBE approach introduced a complex and demanding new framework for programme design, assessment and teaching and learning methodologies, which (at least in theory) was aimed at radically repositioning the learner at the centre of the teaching and learning experience. There have recently been strong moves to simplify and rationalise some of the more administratively cumbersome implications of this approach. 8% of curriculum time is

assigned to the Arts and Culture learning area, which seeks to integrate education across ALL art forms as well as heritage education.

The present curriculum framework – while laudable in its ambitions – has placed complex demands on a pool of educators that generally do not have an evolved pedagogic skills-set in a single one of these forms. Research conducted by the CSIR and the Department of Education in 2003 presents a bleak picture of arts curriculum at schools². The report indicates that between 60% and 80% of the schools included in the sample indicate that they have no adequate staff for Arts and Culture teaching for grades 0 – 7. Zero participation rates in arts and culture in the curriculum range from between 25% (grades 4-7) and 60.5% (girls participation in the arts in grades 10-12). Both the Outcomes Based Education framework as a whole, and the place of arts and culture in the curriculum are currently under review – one of the key proposals is the conflation of the Arts and Culture and Life Orientation curricula within General Education and Training – a proposal which would further dilute the presence of visual arts education in the curriculum.

In Grades 10-12 (falling into the Further Education and Training Band), the visual arts was developed as one of twenty nine more specialised subjects that learners could choose to pursue at this level. The majority of schools however are not able to offer these subjects in the absence of both educators trained to teach them at this level, and specialist infrastructure and resources to support this provision. EMIS data shows the extraordinarily low levels of participation in the visual arts at an FET level: of the 568 995 Grade 12 enrolments in 2009³, only 7810 (1,7%) of these learners were enrolled in visual arts as a subject. The following charts show data for visual arts enrolments broken down by grade, by race and gender, and by province.

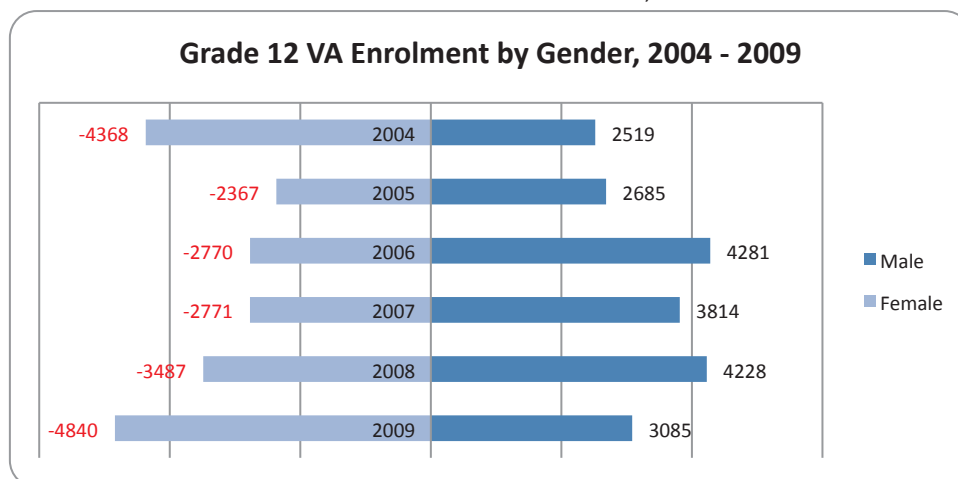
Figure 92: Visual Arts Enrolments Grades 10 - 12, 2004 - 2009



² CSIR 2010. The National Audit of School, Sport, Arts and Culture Programmes: Nodal Focus Phase One – Draft Report, Department of Education. The report, as yet unpublished, represents the findings and recommendations drawn from Phase 1 of this national audit, which included surveying a sample of about 3 000 public schools in the General Education and Training (GET) and Further Education and Training (FET) bands. 2 000 of these were schools from the twenty-one education poverty nodes as defined by the Department of Education, and the balance were a non-representative sampling of non-nodal schools.

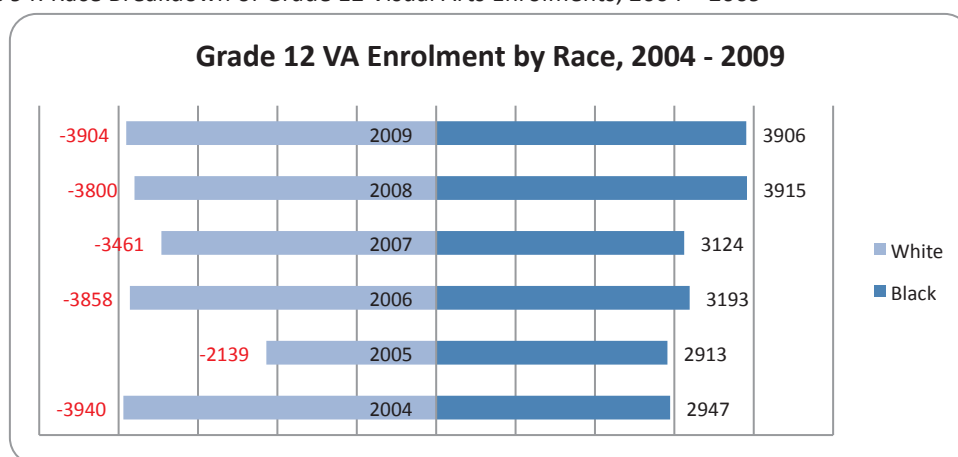
³ DoE (EMIS). 2009. 2009 School Realities. Accessed at www.education.gov.za

Figure 93: Gender Breakdown of Grade 12 Visual Arts Enrolments, 2004 – 2009



Source: EMIS, Department of Education, Annual School Survey, 2004 - 2009

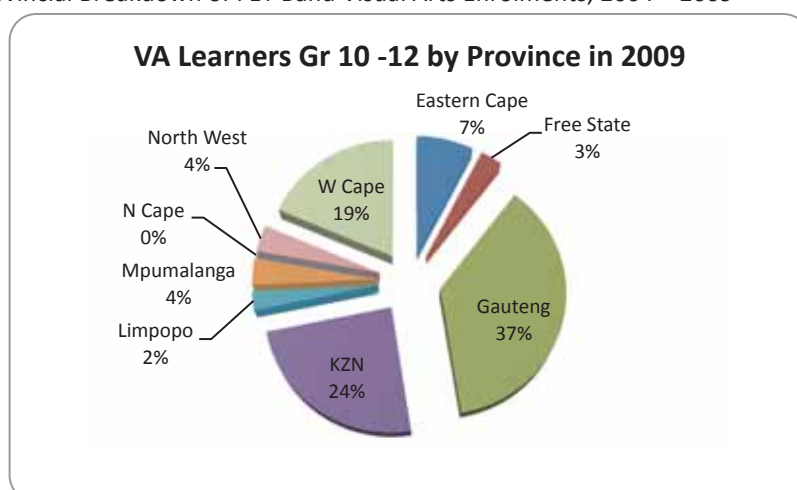
Figure 94: Race Breakdown of Grade 12 Visual Arts Enrolments, 2004 – 2009



Source: EMIS, Department of Education, Annual School Survey, 2004 - 2009

Provincially, there are significant variations in enrolments in the visual arts. The bulk of visual arts students in grade 12 in 2009 were located in Gauteng, followed by Kwazulu Natal and the Western Cape. Combined, the Northern Cape, North West, Mpumalanga and Limpopo provinces present only 10% of visual arts enrolments.

Figure 95: Provincial Breakdown of FET Band Visual Arts Enrolments, 2004 – 2009



Source: EMIS, Department of Education, Annual School Survey, 2004 - 2009

The CSIR survey found that between 78% and 89% of schools indicated that they have no staff able to teach arts and culture subjects at the grade 10 - 12 level. At all levels of the education system, educators from other learning areas in (say geography, or mathematics) have found themselves having to teach a learning area that they have no training or background in.

The same survey also revealed that at least 70% of schools do not offer arts and culture in the context of extra-curricular activities. 70% of schools indicated a complete absence of facilities for supporting arts and culture provision in schools, and 84% of schools indicated the absence of equipment and learning resources to support the implementation of the learning area.

A clear trend that emerged from the survey was that the areas with strongest links to existing religious-cultural practices (e.g. choirs and dance) are more likely to be offered than areas which have weaker links (e.g. visual arts), though generally this kind of provision is only able to address a limited dimension of the overall curriculum.

Teacher training largely occurs through district level initiatives and NGO service provision: these are generally short, sharp interventions outside of an accredited framework. More sustained interventions, usually through NGOs, face the problem of formal accreditation and recognition. There are a very small number of specialist arts and culture in-service and pre-service degree programmes offered through tertiary institutions that address specialism in the arts and culture learning area, or any of the individual art forms.

The closure and merging of teacher training colleges with universities and technikons has exacerbated this situation. There is limited student enrolment for 'upgrade' degrees (such as the Postgraduate Certificate in Education) aimed at training art graduates to function as senior phase/FET teachers. There are only two instances of in-service teacher training programmes in arts education leading to formal degrees (Advanced Certificate in Education programmes at WITS and the University of the Free State).

The CSIR report made a variety of recommendations regarding greater coordination between different governmental departments at national and provincial level in providing targeted support to schools in realising curriculum policy. The formation of a body along the lines of the United School Sports Association of South Africa (USSASA) was contemplated, which would drive interventions in the following areas with support from national and provincial Departments of Education and Arts and Culture:

- Advocacy
- Educator development (both In-Service and Pre-Service Teacher Training)
- Learning and Support Materials
- Infrastructure Development
- Resources

It is unclear what the current status of the proposed coordinating structure is, and there appears to be the absence of a concerted strategy between the Departments of Education and Arts and Culture at a national and provincial level. It is understood that a Memorandum of Understanding exists between the two departments, though it is unclear what the current status of this agreement is. Various ad-hoc initiatives between the two departments – largely centred around arts competitions and schools festivals – have been staged, but these do not adequately address the serious systemic issues outlined above. Within the more

resourced provinces such as Gauteng and the Western Cape, various efforts have also been undertaken to establish schools that have an arts and cultural specialism, which has begun to address some of these issues at an FET level.

6.2 The Tertiary System

The landscape of the tertiary education system, similar to that of the GET and FET bands has experienced significant revision since 1994. The White Paper on Higher Education (1997) provides the policy framework for tertiary education in the country for the purpose of⁴:

- Meeting the learning needs and aspirations of individuals through the development of their intellectual abilities and aptitudes throughout their lives.
- Addressing the development needs of society and provide the labour market, in a knowledge driven and knowledge dependent society, with the ever-changing high level competencies and expertise necessary for the growth and prosperity of a modern economy.
- Contributing to the socialisation of enlightened, responsible and constructively critical citizens.

A number of mergers implemented during the course of the early 2000s, reduced the number of institutions from 36 universities and 15 technikons to 23 new institutions⁵. Of these twenty three 'new' institutions, the majority (17) offer fine arts degree programmes. Six of these institutions are located in Gauteng, and four in the Eastern Cape. Anecdotal evidence suggests that fine art schools in historically black universities are severely under-resourced and under-staffed by comparison to their historically white counterparts. The University of Fort Hare is perhaps the most extreme example of this disparity – with the art department at the university currently comprised of 3 Full Time Equivalent staff and between 50 and 60 students, with access to very rudimentary infrastructure and facilities. The Visual Arts Division at the WITS School of Arts at the University of the Witwatersrand, by contrast, has in the region of 10 Full-Time Equivalent staff and 120 Full-time Equivalent students⁶.

The Department of Higher Education also presides over the FET (Further Education and Training) college system, formerly known as technical colleges. This system has seen very small numbers of learners moving through vocationally oriented programmes in the visual arts, with curriculum development and provision in this component of the education and training system focusing increasingly on competencies in finance, commerce and marketing, various trades and para-professional training in construction and engineering. A new qualification framework was introduced in 2007 with options in a number of consolidated vocational learning paths based on identified areas of need and demand within the system and the wider economy. The visual arts do not feature in this new framework, though delivery of certificate courses continues within the old 'N-certificate' framework. In 2009, nearly 2400 individual enrolments were recorded for visual arts related subjects at different levels of this framework (N2-N6), equating to an estimated 600 learners in the system.

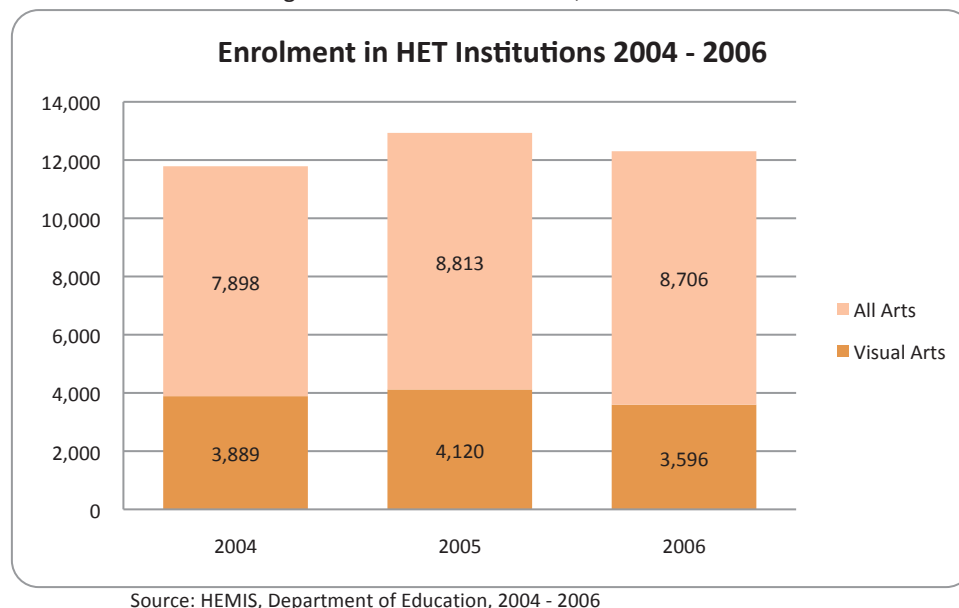
⁴ Principal and Vice Chancellor: University of South Africa. Keynote address at Bill Venter/Altron Literary Awards 2003; Wednesday 7 April 2004, Westcliff Hotel, Johannesburg.

⁵ Jansen, J (2007). "Tracing and Explaining Change in Higher Education: The South African Case", in Review of Higher Education in South Africa, Council for Higher Education

⁶ WITS School of Arts. 2010. Quinquennial Review 2005-9. Internal report.

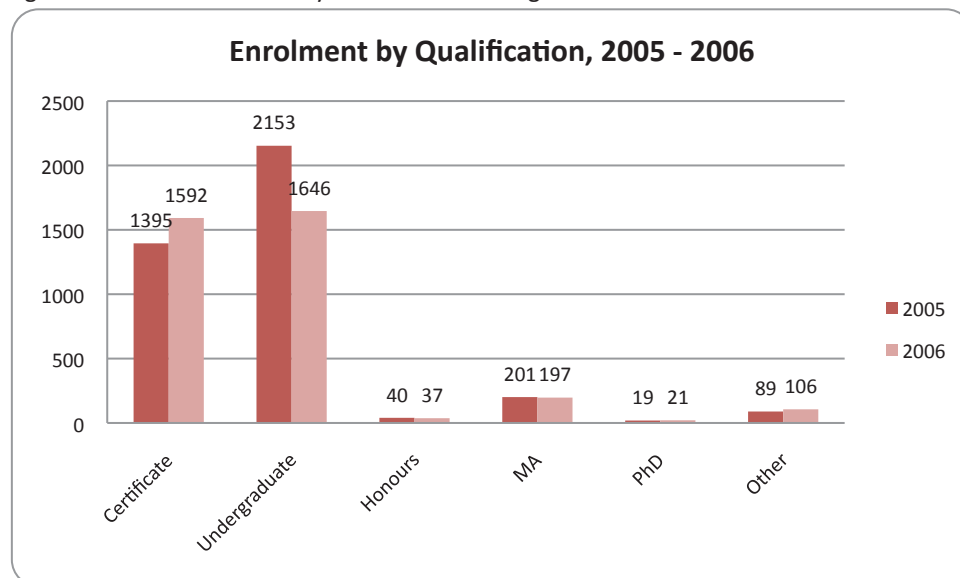
Substantially larger numbers of students are enrolled in visual arts programmes at a university level, accounting for just less than a third of all professional arts enrolments in the tertiary education system in 2006.

Figure 96: Arts Enrolments at Higher Education Institutions, 2004 – 2006



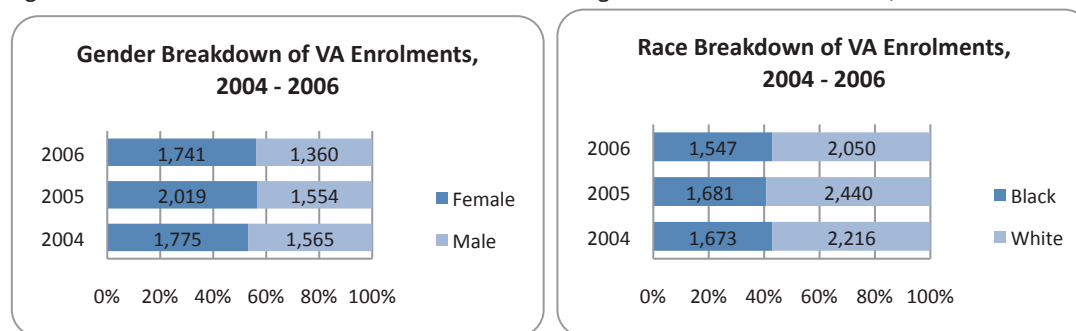
The bulk of these enrolments related to certificate and undergraduate degree programmes, as shown in the following chart:

Figure 97: Arts Enrolments by Qualification at Higher Education Institutions



There is reasonable parity in the gender of all students enrolling in visual arts programmes at higher education institutions. Just over 50% are women and the trend is reasonably consistent over time. The racial profile however, reveals that approximately 40% of all students enrolling are black South Africans, a fairly consistent trend between 2004 and 2006.

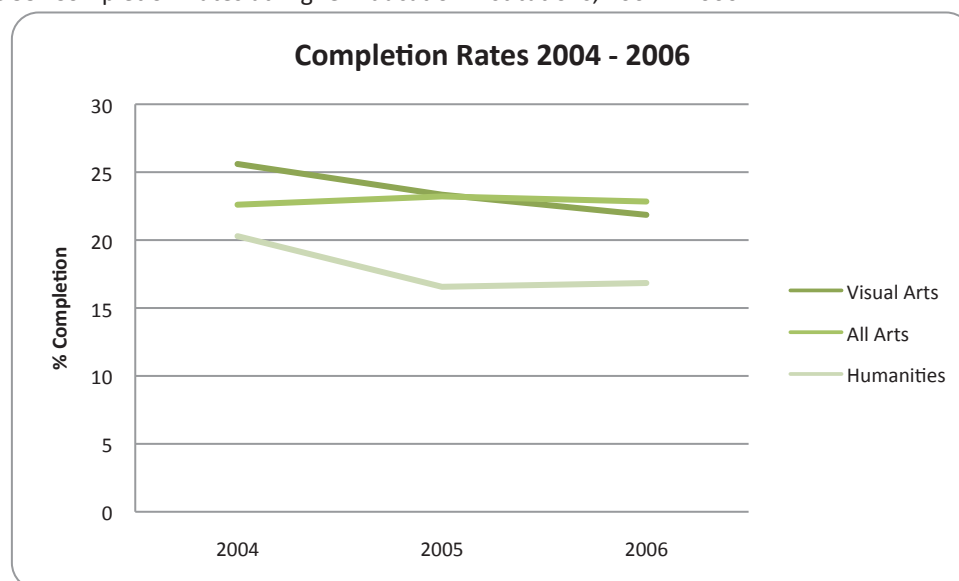
Figure 98: Gender and Race Profile of Enrolments at Higher Education Institutions, 2004 – 2006



Source: HEMIS, Department of Education, 2004 - 2006

In terms of completion rates (an area in which South African tertiary education generally fares poorly by international standards), arts programmes have higher completion rates than other humanities programmes averaging just over 23% of enrolments. The visual arts in 2004 had a higher rate than the rest of the arts although this dropped between 2004 and 2006 as outlined in graph below. Despite the decline in completions, graduations in the visual arts are still well above the overall completion rates for programmes in the Humanities.

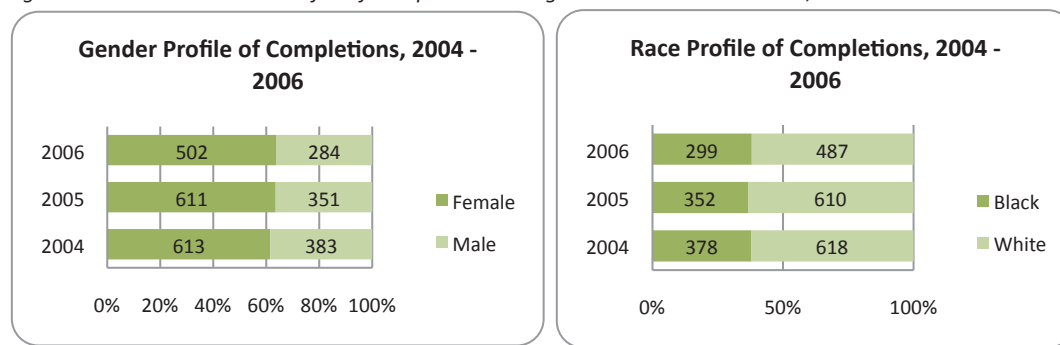
Figure 99: Completion Rates at Higher Education Institutions, 2004 – 2006



Source: HEMIS, Department of Education, 2004 - 2006

With regard to completions, the trend in enrolments for both race and gender are more significant. Over 60% of women generally graduate versus 40% of men. Less than 40% of black students graduated between 2004 and 2006 compared to 60% of their white counterparts. Notably, the overall pattern of enrolments and graduations corresponds closely to the demographics of practicing visual artists outlined in section 5 of this report.

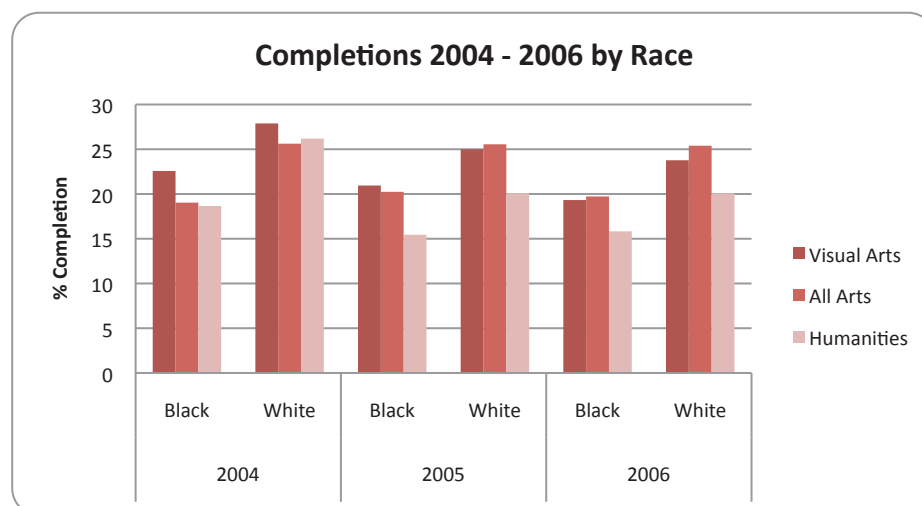
Figure 10: Gender and Race Profile of Completions at Higher Education Institutions, 2004 – 2006



Source: HEMIS, Department of Education, 2004 - 2006

The completion rate for black South Africans in arts programmes is generally higher than that of other humanities programmes. The completion rate for black students in the visual arts is generally higher or equal to that of all professional arts programmes.

Figure 101: Race Profile of Enrolments at Higher Education Institutions, 2004 – 2006



Source: HEMIS, Department of Education, 2004 - 2006

6.3 Work-based training

Most industry training that takes place within the visual arts sector occurs outside of a formal accredited or recognised framework. Industry organisations and associations, NGOs and private organisations have been the main providers of training associated with professional practice needs within the industry, both for individual artists and for organisations. The regulatory framework for industry training is outlined in what follows, together with some of the difficulties that organizations have experienced in engaging with this framework.

During the course of the early 2000s the various Sector Education and Training Authorities (SETAs) were established under the Skills Development Act, presided over by the Department of Labour and the National Skills Authority. The Sector Education and Training Authorities were tasked with addressing the skills development needs of the work force within different sectors of the economy, and promoting access into the labour force for

youth in particular through demand-driven work-based training programmes (known as learnerships and skills programmes), informed by an analysis of industry needs. Within this legislative framework, the operating costs of the SETAs and the financing of these programmes are addressed through the collection of a skills development levy from all employers with a wage bill above a certain level. The South African Revenue Services then distributes this levy to relevant SETAs based on industry cluster to which employers belong. Employers are able to claim this money back based on the development and implementation of a Workplace Skills Plan which they submit to the SETA. New qualifications based on unit standards (outcomes-based packages of minimum standards for competence in specific areas) were developed to establish minimum standards for this work-based training, which would notionally articulate with learning pathways within other parts of the General, Further and Higher Education system.

Responsibility for addressing the needs of the cultural and creative industries fell largely within the scope of the Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority. Due to the fact that very little revenue was envisaged coming from the arts sector through the collection of Skills Development levies (based on the preponderance of micro-enterprises and freelance workers), the national Department of Arts and Culture secured substantial additional funding from the National Skills Fund of the Department of Labour, for the development of qualifications, learnerships and skills programmes through the Create SA programme, undertaken in partnership with the MAPPP SETA between 2002 and 2006. One of the important achievements of this programme was to establish a framework through which training historically provided by NGOs and industry organisations, could be accredited. Finance for training in the arts has subsequently been largely provided through the allocation of discretionary grants by the MAPPP SETA as well as some additional project funding from the Department of Arts and Culture (largely targeted at the craft sector).

Within the visual arts, most of the training that has been provided within this framework has been accredited through qualifications developed for the design sector, and offered by a very small number of training providers across the country. Draft qualifications were developed for the visual arts in 2006/7, but these have yet to be ratified with the South African Qualifications Authority. Qualifications and unit standards developed for arts and culture administration and management and craft entrepreneurship have also been adopted by a small number of independent training providers. The administrative demands and costs of accreditation have however excluded smaller enterprises from taking this formal route for accreditation of workshops and short courses that they may provide, and most of the workshops and short courses that are provided outside of the tertiary system are not accredited.

A wide-ranging review of the SETA landscape and operations has accompanied the recent shifting of responsibility for this part of the education and training system to the Department of Higher Education (from the Department of Labour). This is likely to result in a reconfiguration of the scope of individual SETAs, with a number of SETAs being merged. It is not as yet clear what the implications of this reconfiguration will be for the arts sector in general, and the visual arts in particular.

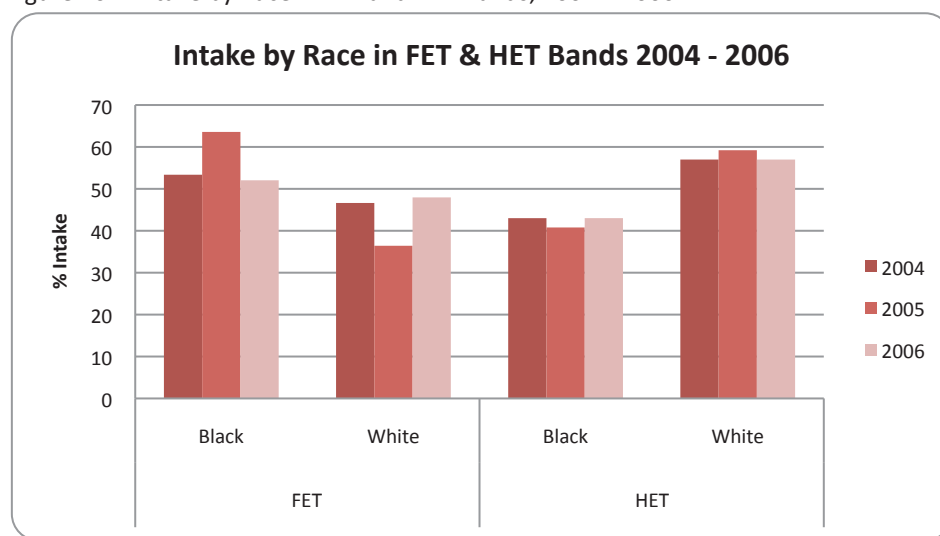
6.4 Key Issues

While there is very substantial investment in the schooling system in South Africa, visual arts education remains a marginal area of curriculum implementation, with attention and

investment focused on mathematics, science and technology education. The capacity of schools to implement the visual arts component of the grade 1-9 curriculum, or introduce extra-curricular programming in this area is extremely constrained due to problems related to teacher capacity and training and equipment and resources. This is mirrored at the FET (Grade 10-12) level, where only a very small number of largely former model C schools are in a position to offer the visual arts as a subject area. Some progress has nevertheless been made in providing greater access to this subject area to black learners at an FET level.

While substantial progress has been made in addressing race imbalances in tertiary fine art programmes, the demographics of enrolments and throughput in tertiary programmes remain substantially out of step with the general demographics of the country, and there is a 'gap' between the increased rate of black enrolments at an FET level and black enrolments at a tertiary level, as summarised in the following chart:

Figure 102: Intake by Race in FET and HET Bands, 2004 – 2006



Source: HEMIS, Department of Education, 2006

The arts, and the visual arts in particular, have historically been negatively perceived in relation to their prospects for employment and earnings – in contrast to learning and career pathways in for example the fields of commerce and finance, which attract far more black enrolments at tertiary institutions. The high cost of tertiary education also militates against enrolment in programmes that do not seem to offer well-mapped pathways into the world of work. Consideration needs to be given to ways in which particularly black students from low-income backgrounds can be attracted to fine arts programmes at a tertiary level through, for example, targeted bursary programmes and more effective and nuanced marketing of the diversity of career options associated with the visual arts.

The data suggests that at any given moment, there are almost as many enrolments in the tertiary education system than there are practicing visual artists working in the sector, and that each year approximately a thousand students complete various levels of qualification in the visual arts, the majority located within certificate and undergraduate degree programmes. This figure corresponds to just less than 20% of practicing visual artists, based on the primary research undertaken in the context of this project (cf sections 2 and 5).

Anecdotal evidence confirms that only a very small proportion of graduates go on to actually become practicing visual artists, the balance being absorbed into a range of other functions in the industry (teaching, training, administration, technical support, etc), into adjacent and

related industries such as craft and design, and into unrelated industries. Additional research would be required to ascertain what the split is between these different post-graduation routes.

One of the perennial issues highlighted in relation to professional arts programmes at a tertiary level is the generally weak provision of training in professional practice skills. Many graduates leave the university system with a sophisticated grasp of their practice and relevant critical theory, but little understanding of the legal and financial dimensions of working as a visual artist, and how to promote their practice effectively in a complex and fluid industry environment.

The position of visual arts training within the FET college system needs to be reviewed. FET colleges potentially provide young people with access to affordable and vocationally oriented training in the visual arts. Currently, provision through this institutional framework plays a relatively small role in the sector – as noted in section 5 of this document, only 14% of surveyed artists indicating that they have undergone training through an FET college – versus 43% and 37% of respondents indicating that they have gone through an undergraduate or postgraduate degree respectively.

The SETA framework potentially provides an important opportunity both for the formal recognition and financing of workshops and short courses provided by industry organisations. This is particularly so in relation to training related to professional practice issues in the visual arts.

In all of the above areas, more systematic and formalised engagement between the Ministry of Arts and Culture and the Ministries of Education is required to address the more comprehensive delivery of meaningful arts education at a formative level. A more integrated and more substantially resourced policy-driven programme of engagement with the arts education mandate needs to be developed between the two Ministries, together with their counterparts at a provincial level. As noted in research and policy documents commissioned by the Ministry of Education itself, the arts have an important and powerful role to play in transforming the nature of education in South Africa. Such connection also has powerful potential to create work for artists in schools, working alongside teachers in the delivery of the arts curriculum and in extra-curricular arts activities. And from an industry perspective, it is crucial to growing the future audiences and consumers of the visual arts.

Section 7

Funding and Sponsorship of the Visual Arts

In what follows, the policy, legislative and institutional framework for the funding of the visual arts is summarised at a national, provincial and local level. Indirect incentives for stimulating investment in the non-profit arts sector are addressed below in relation to the Department of Finance's role in relation to the provision of tax benefits on donations.

The White Paper envisaged the national Department of Arts and Culture playing a lead role in the promotion both of direct funding for the arts generally, and the diversification of the funding landscape for the arts through the unlocking of new resources from the private sector and international funding agencies. The White Paper outlines a basic conceptual position on the funding of the arts which seeks to both respect the autonomy and independence of the arts, and address wider social and economic objectives:

"[We] wish to develop exactly that "arms length" relationship which is fundamental to freedom of expression. At the same time, all funding from the public purse carries certain obligations with it, and these obligations of accountability must be applied with due responsibility and creativity. Promotion without undue promulgation would be our ideal."¹

One of the signal shifts that occurred in the post 1994 period involved concerted efforts on a variety of fronts to make larger amounts of grant funding available on a more equitable and transparent basis, as opposed to being sunk into the large and expensive national performing arts institutions and museums, largely located in urban areas and historically primarily servicing white audiences and consumers. This involved directly setting up particular entities (the National Arts Council, Business and Arts South Africa, the National Lottery Distribution Trust Fund), as well as looking at ways to encourage and promote greater levels of private sector and international investment.

Indeed, during the course of the last fifteen years, virtually all of the funding structures contemplated in the White Paper have in fact been realised. This has led to a situation in which approximately R15,5 million was disbursed to the visual arts sector through responsive grantmaking schemes in the 2008/9 financial year – just over 5% of the estimated R284 million made available to the arts as a whole². The following table and charts indicates the split for all sources of public and international funding for the arts overall, and for the visual arts, for the 2008/9 financial year. These figures do not include investment through corporate sponsorship and Corporate Social Investment programmes – these are separately discussed below.

Table 39: International, National and Provincial Sources of Grant-based funding			
Overall funding	2008/9 – ALL art forms	2008/9 – Visual Arts	Visual Arts as % all Arts
National Arts Council	65 244 710	5 640 699	8,6
NLDTF/Lottery	168 480 624	4 011 574	2,4
BASA, ACT	2 873 500	445 500	15,5

¹ White Paper, 1996, preface, accessed at www.dac.gov.za

² Note that these figures only reflect funding schemes that involve the accessing of funds *by application*; they do not include investment through the procurement of services by national, provincial or local government, or the annual subventions to institutions such as art museums and community arts centres (this is dealt with in the ensuing section on institutions); the figures for total funding available for the arts also do not take into account projects of the national Department of Arts and Culture such as the Investing in Culture programme, which would push the overall figure for funding for the arts substantially higher.

International ³	22 349 922	3 331 956	14,9
National DAC discretionary grants	not known	854 529	less than 1%
Provincial grants	28 080 458	1 172 040	4,2
TOTAL	287 029 214	15 456 298	5,4

Figure 103: Sources of Grant Funding for the Arts in South Africa

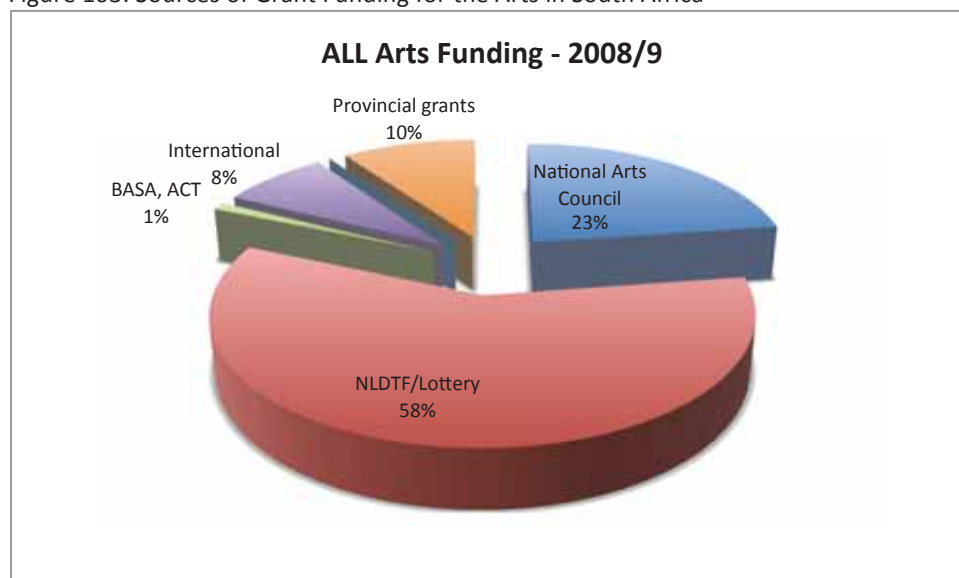
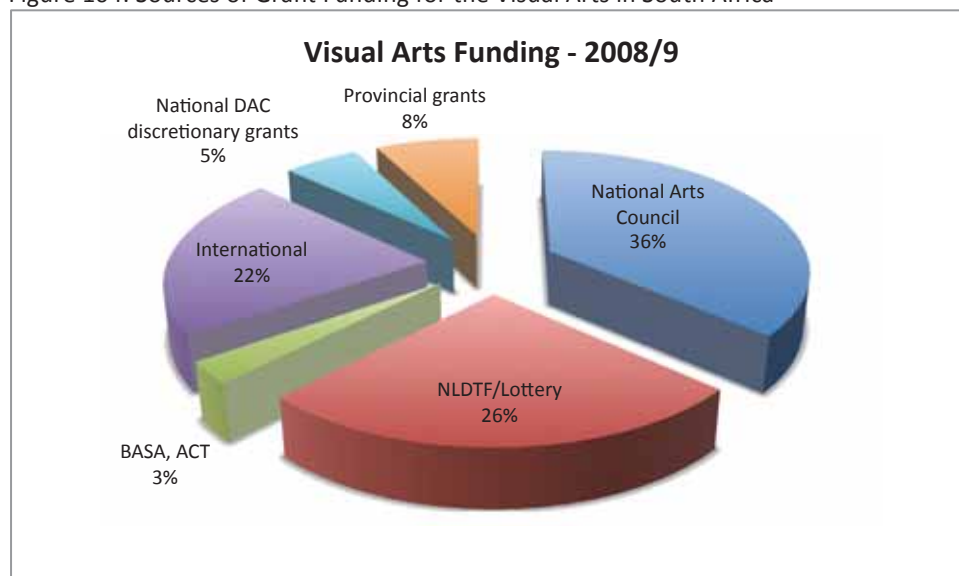


Figure 104: Sources of Grant Funding for the Visual Arts in South Africa



The mandates and funding patterns of each of these entities in relation to the visual arts are analysed in more detail in the ensuing section.

³ These figures reflect a limited sample of international funders: the French Institute/French Embassy, Pro Helvetia (Switzerland), the Swiss Development Corporation, the Mondriaan Foundation (Holland), Africalia (Belgium). It was not possible to obtain funding information from a number of other key funders, such as the Goethe Institute and the Royal Netherlands Embassy. These figures also do not reflect bilateral funding agreements negotiated directly with foreign governments by the DAC; they only reflect the direct funding of organisations and projects on an application basis.

The Ministry was also responsible for setting up the National Research Foundation (NRF), which makes research grants available to higher education institutions. When the Ministry of Arts, Culture, Science and Technology was split into two separate Ministries, responsibility for the NRF was allocated to the Department of Science and Technology. It is not known what the funding profile of the NRF is in relation to the arts in general or the visual arts in particular – engagement with the targeted promotion of academic research across the visual and performing arts represents an additional avenue that the Department could pursue in the future in partnership with the NRF.

7.1 The National Arts Council

The National Arts Council was established in the latter part of the 1990s under the National Arts Council Act no 56 of 1997, replacing the pre-1994 Foundation for the Creative Arts. The National Arts Council is governed by a Board ('the Council'), which is composed of 9 provincial representatives and 9-14 other nominated members, who are subjected to a public interview process and are appointed by the Minister. The Cultural Laws Amendment Act (no 36 of 2001) subsequently also made the appointment of the Chairperson of the Council the prerogative of the Minister of Arts and Culture. The objects of the council are to:

- To provide, and encourage the provision of, opportunities for persons to practice the arts;
- To promote the appreciation, understanding and enjoyment of the arts;
- To promote the general application of the arts in the community;
- To foster the expression of a national identity and consciousness by means of the arts;
- To uphold and promote the right of any person to freedom in the practice of the arts;
- To give the historically disadvantaged such additional help and resources as are required to give them greater access to the arts;
- To address historical imbalances in the provision of infrastructure for the promotion of the arts;
- To promote and facilitate national and international liaison between individuals and institutions in respect of the arts;
- To develop and promote the arts and to encourage excellence in regard to these.

In fulfillment of these objects, the Council receives an annual grant from the Department of Arts and Culture, which is then distributed to the sector through (usually) the medium of a bi-annual Call for Proposals. Between 2006/7 and 2008/9 the annual allocation from the Department has grown from R47 894 000 in 2005/6 to R72 853 000 in 2008/9⁴.

The Council appoints advisory panels for each art form to make recommendations on the allocation of grants against submissions made to the NAC, informed by the set of overarching purposes outlined above. These panels assess submissions across the following areas:

- Visual Arts
- Crafts
- Dance And Choreography
- Literature
- Multi-Discipline

⁴ Annual Reports of the Department of Arts and Culture: 2006/7, 2007/8, 2008/9; accessed at www.dac.gov.za

- Music And Opera
- Theatre And Musical Theatre

For visual arts, eligible projects include: creation of new art works, exhibitions, touring exhibitions, visual arts catalogues, research and documentation, art teaching at community level, workshops and residencies. In addition, individuals and institutions can also apply for bursaries from the NAC to support further study in a particular art form or associated area (eg arts management).

Total funding disbursed to the arts sector grew from R48 million in 2006/7 to R67 million in 2008/9. The following two charts show the relationship between the share of funding that the visual arts receives versus the number of grants approved for each art form. The third chart shows trends in overall funding to the different art forms during the 2007-9 period. While the visual arts – together with music – has the greatest number of submission approved, it receives the third smallest total allocation of actual funds (9% vs 31% for music and opera). While there is a steady incline in the share of visual arts funding (from 4% to 7% to 9% of total NAC funds between the 06/07 and 08/09 financial years), the data demonstrates the extent to which National Arts Council funding disproportionately benefits the performing arts.

Figure 105: NAC funding by Art Form (% of funds) – 2008/9

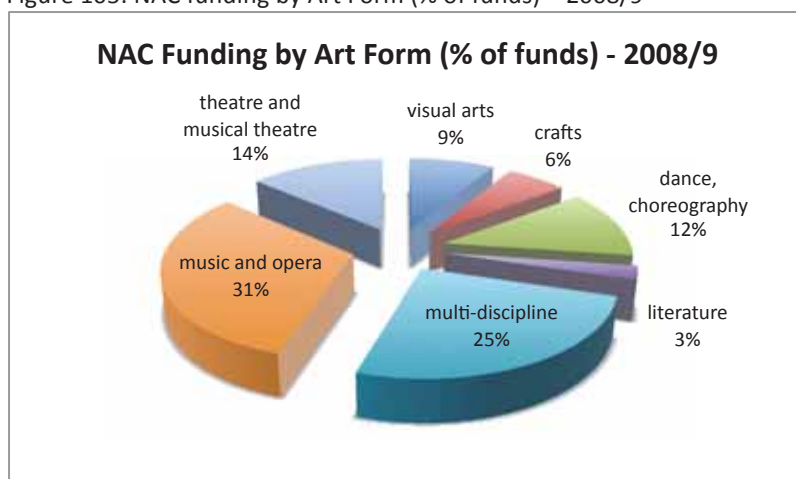


Figure 106: NAC funding by Art Form (% of total no of grants) – 2008/9

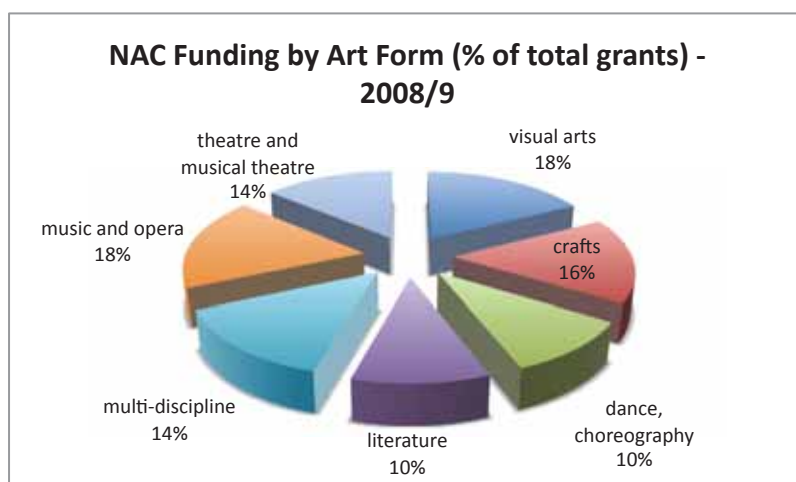
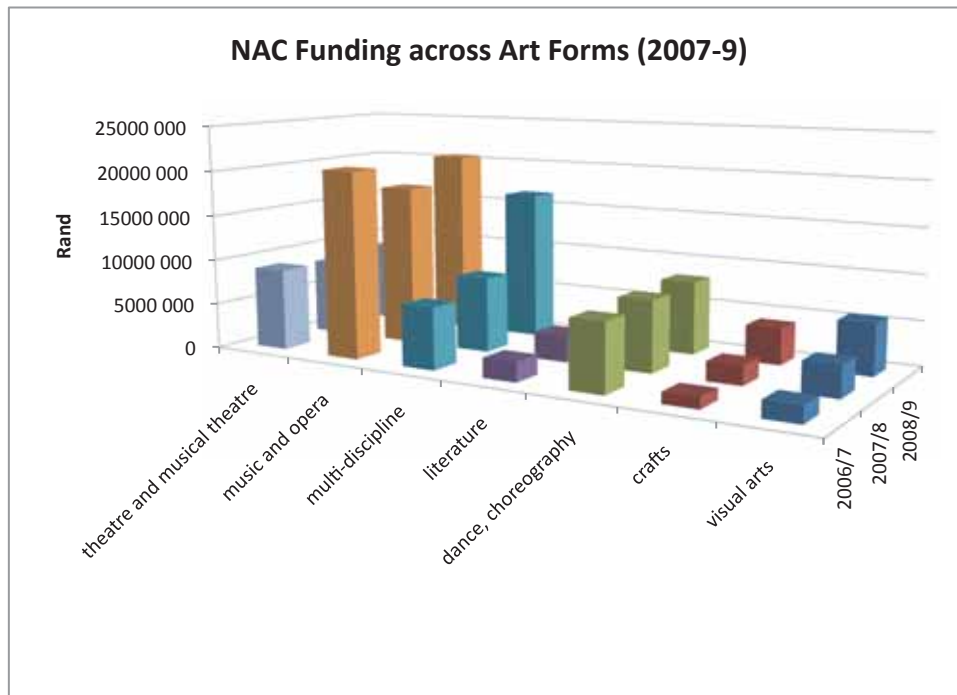


Figure 107: NAC funding Across Art Forms – 2007-9



When NAC funding is broken down by province, it is also clear that Gauteng receives by far the largest share of visual arts funding. This is even the case when one considers this funding on a per capita basis (i.e. the amount of visual arts money spent moderated against the total population of each province), as demonstrated in the following two charts:

Figure 108: NAC Visual Arts funding by province, absolute rand values – 2007-9

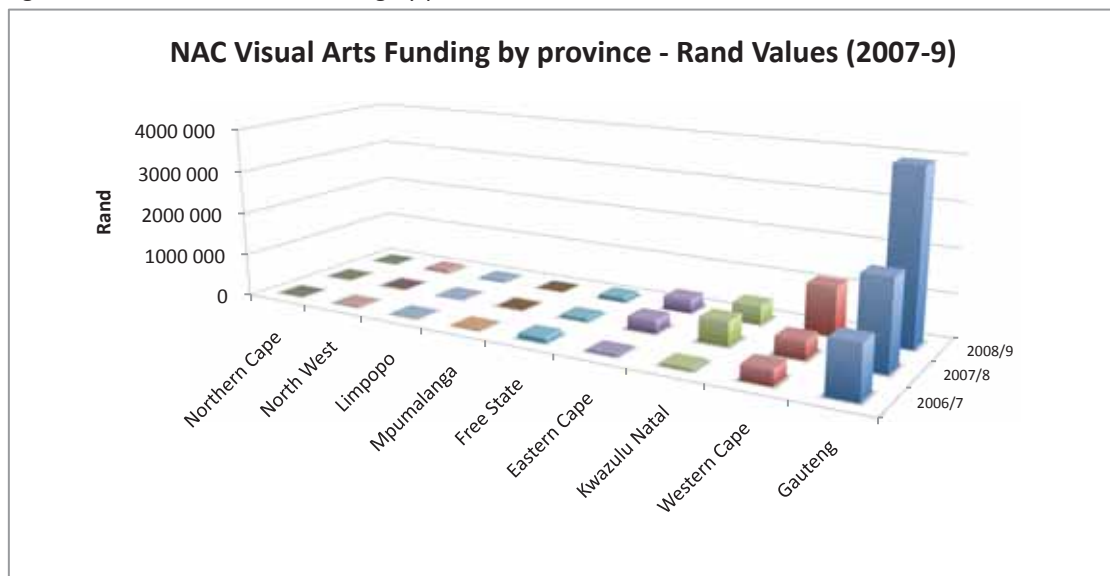
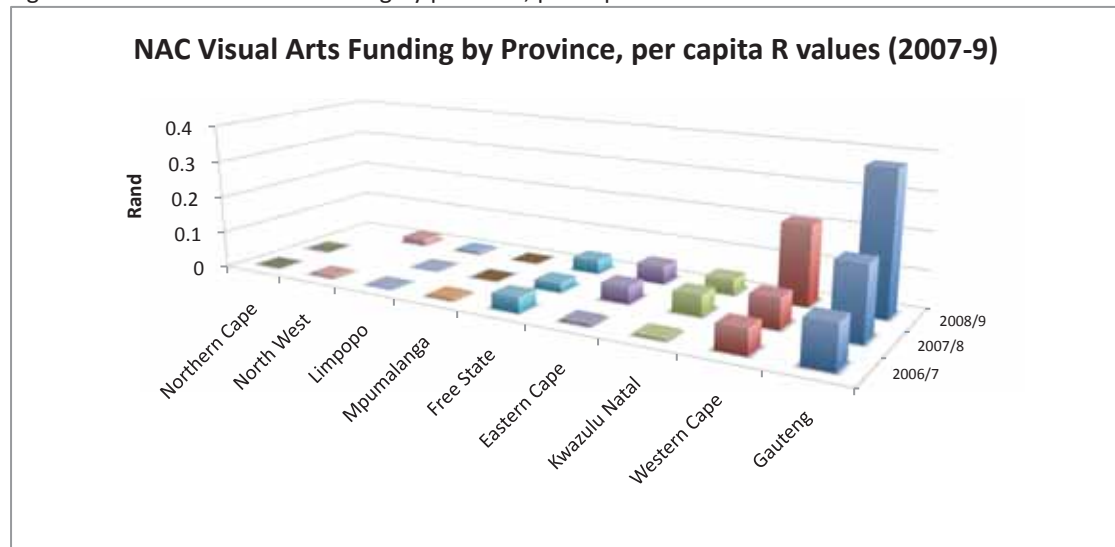
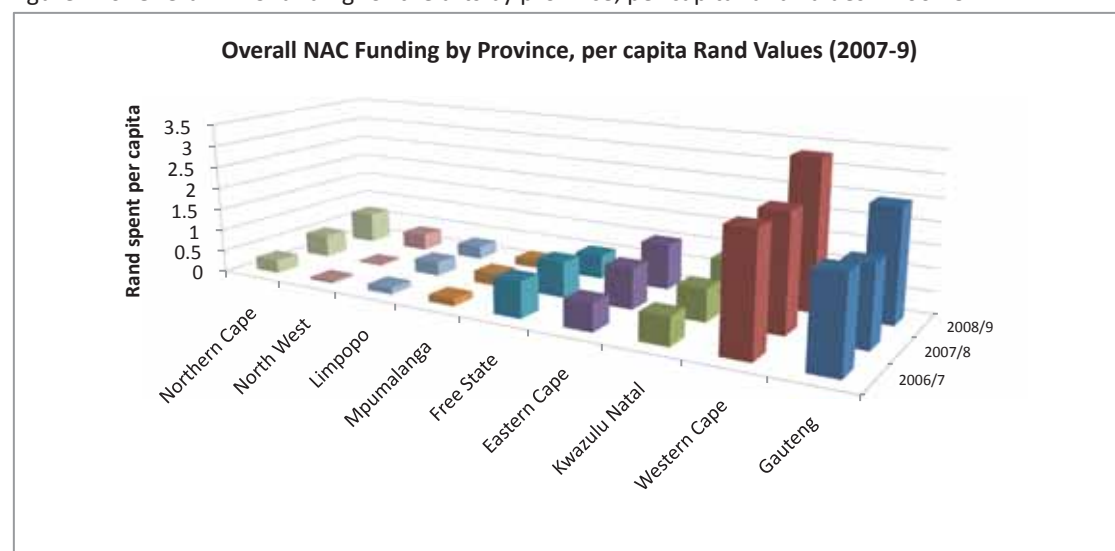


Figure 109: NAC Visual Arts funding by province, per capita rand values – 2007-9



This contrasts however with the overall spread in National Arts Council funding across ALL art forms, where the Western Cape shows higher levels of funding than Gauteng when this funding is considered on a per capita basis:

Figure 110: Overall NAC funding for the arts by province, per capita rand values – 2007-9



Consideration of National Arts Council funding patterns within an international context highlights some of the basic constraints that the Arts Council operates under in relation to its current level of subsidy from national government. In 2008/9, the Arts Council of England invested a total of £570 million (over R6,6 billion) in the arts – a significant portion (8%) of this budget was derived from the National Lottery in the UK. Over half of this budget (58%) was assigned to regularly funded arts organisations, and £67 million (circa R780 million) could be applied for directly. In the same year, the Arts Council of Australia invested A\$175.3 million (circa R1,16 billion) in the arts overall and A\$16,8 million (R111,1 million) in the visual arts alone (10% of it's overall budget). Even given the substantial differences in the national economic contexts of the countries under consideration, the comparison is indicative of an overall level of underfunding in the South African context.

7.2 Funding Programmes within the Department

In the normal course of things, the Department does not provide funding on an application basis – this is the function of the National Arts Council. However, the department does in certain instances provide direct programme funding in areas that it regards as being of strategic importance. For example, the Investing in Culture programme has involved substantial investment in craft projects with a job creation/skills development dimension across the country – over R45 million was spent on this programme in 2008/9 alone (down from R76,5 million in 2007/8). The Arts, Social Development and Youth directorate is also involved in funding a variety of initiatives related to community arts centres and arts in education, which cut across art forms.

Visual arts specific funding has largely been channeled through the Multi-Media: Visual Arts unit. Recent significant projects supported include:

- The Visual Century Project – a multi-part documentation of the last 100 years of visual arts practice in South Africa
- The Innovative Women in Art Exhibition – an exhibition of ten leading black South African women artists
- The Cape Africa Platform – a conference and biennale project

Funding directly to the visual arts has been extremely limited by comparison to direct DAC involvement in other sectors such as craft.

7.3 The National Lottery Distribution Trust Fund

The National Lotteries Board and National Lottery Distribution Trust Fund were brought into being through the Lotteries Act (Act no.57 of 1997). The Trust Fund is managed by the National Lotteries Board, and operates with funds that are received on a weekly basis from the operator licensed to run the National Lottery, against a predetermined formula. The proportion of monies transferred ranges between 10% and 40% of proceeds from Lottery ticket sales.

The NLDTF was operationalised only during the course of 2000 and 2001, with Distributing Agencies appointed by the Minister for each of the three legislated areas of funding:

- arts, culture and heritage
- sports and recreation
- charities

A fourth area for disbursement contemplated in the Act – Reconstruction and Development – has not to date been activated.

The Distributing Agencies are appointed on the basis of a process of public nomination, and through consultation with relevant government departments – in the case of the Arts, Culture and Heritage panel, this involves the Minister of Trade and Industry consulting with the Department of Arts and Culture. The NLDTF makes grants in the following areas:

- Major projects, defined as projects of national significance
- Rural grants, targeting arts, culture, heritage, indigenous knowledge and Environmental projects in the provinces outside of Gauteng and the Western Cape
- Arts: encompasses –
 - Creative Development Grants for the development of new work
 - Grants for Festivals
 - Grants for Film Production

- Grants for Public Art Projects
- Heritage grants
- Grants for Environmental and Eco-tourism projects

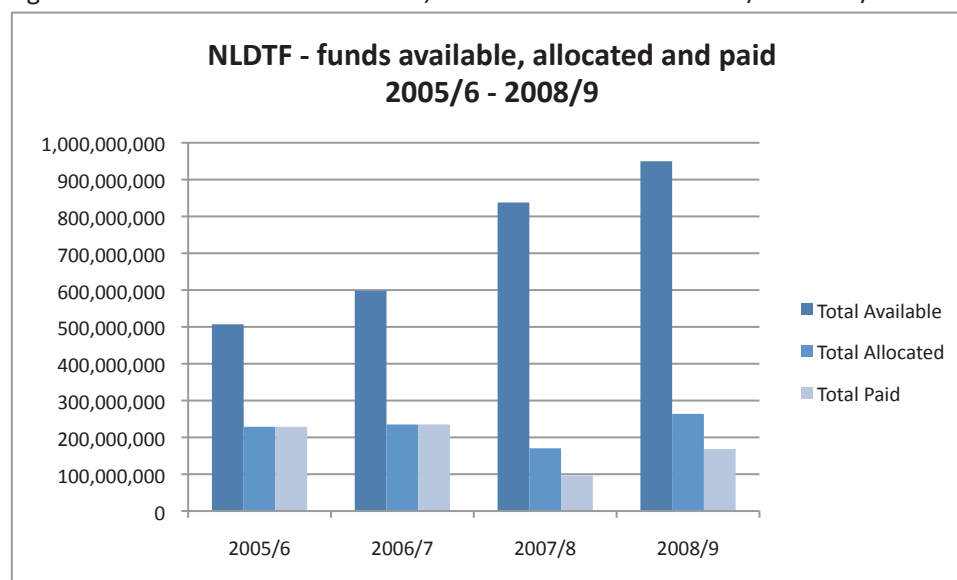
The National Lottery Distribution Trust Fund is the largest single funder of the arts in South Africa – in the 2008/9 financial year, the NLDTF had just under R1 billion available to spend on arts, culture and heritage organisations and projects, approximately **15 times** the amount that the NAC spent in the same year.

However, funding data extracted from successive annual reports reveals a number of worrying trends within NLDTF support for the arts generally and the visual arts in particular. The following table shows, for each year from 2005/6, the amount of money available for disbursement to arts, culture and heritage projects, the amount that was allocated and the amount that was actually recorded as spent.

Table 40: NLDTF Funds Available vs Funds Distributed

Year	Total Available	Total Allocated	Total Paid	Total paid as % of available funds	No of grants to the visual arts ⁵	Paid to Visual Arts Organisations/ Projects	Visual Arts as a % of Total Paid
2005/6	507 000 000	228 800 000	228 800 000	45%	4	2 866 139	1,25%
2006/7	598 000 000	235 000 000	234 954 568	39%	5	8 217 713	3,50%
2007/8	837 800 000	170 300 000	96 429 232	12%	5	4 225 956	4,38%
2008/9	949 800 000	263 800 000	168 480 624	18%	10	4 011 574	2,38%

Figure 111: NLDTF: Funds Available, Allocated and Paid – 2005/6 – 2008/9



The data demonstrates an overall year-on-year decline in the capacity of the NLDTF to spend the money that it has available for arts, culture and heritage, with the 2007/8 financial year

⁵ figures for disbursements to visual arts organisations have been based on scrutiny of the detailed lists of funds disbursed included in NLDTF annual reports. These reflect grants to organisations whose primary mission relates to the visual arts, and does not include festivals, community art centres, multi-form projects. In at least one instance, a beneficiary is recorded as being paid funds in the 2006/7 annual report when this was not in fact the case – the particular beneficiary was only contacted in early 2010 by the NLDTF, in response to a funding application made in 2005/6.

representing something of a nadir in the organisation's performance in this regard. It also indicates that the amounts allocated to the visual arts are accounted for by a small number of large grants – in contrast to the National Arts Council, which distributes a larger number of smaller grants. The proportion of all funds allocated to the visual arts is also extremely low by comparison to, for example, the National Arts Council. The Funding Practice Alliance, a coalition of non-profit organisations has conducted research that shows that the arts, culture and heritage Distributing Agency has performed the worst of the three distributing agencies which have been established, distributing just 54% of all monies available for disbursement during its eight years of existence⁶. The fact sheet also notes the familiar problems of the bulk of funding going to the three most resourced provinces.

While the critical problem of unspent – and accumulating – monies may to some degree be ameliorated by NLDTF expenditure relating to the 2010 World Cup, it is clear that there is a set of underlying systemic problems that will need to be resolved. A Department of Trade and Industry Presentation to the Parliamentary Portfolio Committee in February 2010 makes reference to a set of challenges relating to administration, including 'capacity constraints, communication, loss of documents, grant agreements'.⁷

New regulations were introduced in July 2010 which seek to promote more effective distribution of Lottery funds, and resolve a number of other issues relating *inter alia* to the framework for accountability around the NLDTF and lack of clarity in the criteria which are applied to submissions. In terms of these regulations, 50% of funds available for disbursement will be reserved for particular priority areas. In the case of the Arts, Culture and Heritage distribution agency, these priority areas have been identified as projects concerned with traditional knowledge and culture, the development and preservation of heritage sites and the promotion of arts and crafts by disabled people and women. A degree of relaxation on the administrative requirements attached to submissions will also be introduced – new applicants no longer need to submit audited financial statements, and can now submit financial statements prepared by an independent accounting officer. The February 2010 presentation also contemplates the National Lotteries Board undertaking an education and outreach campaign aimed at encouraging more and better quality applications from beneficiaries across the country.

While the latter measures will make it easier for first-time organisations to apply, the Department of Trade and Industry has also indicated that applicants will be required to 'attend training prior to allocation of funds on the utilisation of funds, [relating to] reporting of funds, record keeping for accounting purposes, possible areas of improvement'. It is unclear how the new regulations and proposals will address the problems of 'capacity constraints, communication, loss of documents, grant agreements', which would appear to be among the key factors in impeding the effective distribution of funds – indeed such requirements for training will place further demands on the administrative and management capacity of the NLDTF.

⁶ Funding Practice Alliance. 2010. NLDTF and NDA Literature Review Fact Sheets. Accessed at http://www.inyathelo.org.za/downloads/NDA_and_NLDTF_Literature_Review_Fact_Sheets.pdf

⁷ Department of Trade and Industry. 2010. Challenges on National Lotteries Distribution Fund: Presentation To The Portfolio Committee On Trade And Industry. Accessed at http://www.thedti.gov.za/parliamentary/020310_dti_presentation_NLB.pdf

7.4 Business and Arts South Africa and the Arts and Culture Trust

The Arts and Culture Trust was established during the course of the 1990s prior to the formation of the National Arts Council and the National Lottery Distribution Trust Fund, partly in response to the need to address continuity of funding to organisations and projects in the absence of these structures being in place yet. The Department of Arts and Culture was one of the founding trustees for the organisation, contributing a portion of the seed capital for the Trust. The trust capital has now evolved into a substantial fund from which the organisation can run its core operations, and ACT now runs a variety of modest funding schemes supported by both international donors (such as the Royal Netherlands Embassy) and development funders (such as Breadline Africa). It has continued to play a small but significant role in the funding of the sector and has achieved a reputation as a responsive and professionally run grant-making body.

Business and Arts South Africa was established in 1997 as a joint initiative between the (then) Department of Arts, Culture, Science and Technology (now the Department of Arts and Culture) and the private sector – the culmination of the White Paper’s stated commitment to investigate the formation of a “National Association for Business Sponsorship of the Arts”.

BASA plays a role in facilitating business sponsorship of the arts and runs a matching grant scheme aimed at incentivising partnerships between the arts community and the corporate world. The matching grant scheme is able to leverage complementary sponsorship from corporates at a ratio of up to 1:16⁸. Aside from funding, BASA also plays a significant role in research and advocacy, commissioning research into audience trends, and staging events such as the BASA Awards (sponsored by Business Day) aimed at recognizing and promoting exemplary arts/business partnerships.

BASA is registered as an independent legal entity, registered as a section 21 company, and receives an annual grant from the Department, in addition to revenue generated through corporate membership and project-specific funding. The Department’s allocation to BASA has grown from R4 349 000 in 2005/6 to R5 180 000 in 2008/9⁹.

While the overall funding allocations of BASA and ACT are small, they play an important role in the overall funding map of the sector as small, flexible agencies able to add value to projects beyond simply making financial resources available.

7.5 Provincial Government

The White Paper also envisaged provincial government playing a complementary role in the provision of funding at a provincial level. Provincial government has been involved in funding for the visual arts in two ways: through the establishment of provincial arts councils and through direct funding to the arts from provincial departments carrying the arts and cultural mandate. Along similar lines to the regional structures of the Arts Council of England, the Provincial Arts Councils were envisaged as regional counterparts to the National Arts Council, supporting arts and cultural organisations and projects producing significant work at a regional level.

⁸ personal communication, Michelle Constant, BASA CEO.

⁹ Department of Arts and Culture. Annual Reports, 2006/7, 2007/8, 2008/9. Pretoria

A variety of models have been followed in the establishment of provincial arts councils, and the scale of funding administered by these structures has varied greatly between provinces and departments. The overall scale of funding has generally been modest, and the proportion assigned to the visual arts small. The following represents a breakdown of allocations during the 2008/9 financial year based on data that could be obtained from provincial departments.

Table 41: Provincial Arts Councils: Funds Disbursed to All Arts and the Visual Arts

Provincial Arts Councils	2008/09 – ALL arts	2008/09 – Visual Arts	Visual Arts as % of ALL arts
Gauteng	6 742 500	190 000	2,8
Western Cape	10 147 595	258 570	2,5
Kwazulu Natal	not known	not known	
Eastern Cape	5 409 139	383 500	7,1
Free State	5 000 000	280 000	5,6
Mpumalanga	not known	not known	
Limpopo	0	0	-
Northern Cape	not known	not known	
North West	781 224	59 970	7,7
TOTAL	28 080 458	1 172 040	4,2

In addition to these allocations through arts council-type structures, other finance is made available for projects and initiatives seen as being of strategic significance at a regional level, though there is extreme variation in levels of investment between regions. In the Western Cape, for example, an additional R10,72 million was made available through the Micro-Economic Development Strategy (MEDS) of the provincial Department of Economic Development and Tourism (EDT) – R1,15 million of this went to the visual arts. In Gauteng, substantial investment over and above funds allocated by the Gauteng Arts and Culture Council (reflected in the above table) went into the visual arts through support for the Joburg Art Fair and the Soccerex exhibition in the same financial year. In the case of Limpopo however, no budget allocation was made to the Limpopo Arts and Culture Council during the 2008/9 financial year. An independent non-profit organisation, the Limpopo Arts and Culture Association, invested R478 000 of NLDTF, Corporate and international funding into the visual arts in the province in 08/09, of which approximately R300 000 went to the visual arts.

Funding for the visual arts from provincial arts and culture councils and provincial departments is likely to remain modest, as reflected in the data above. Particularly in the more rural provinces where visual arts infrastructure is very limited, priority is given to investment in craft projects and organisations, where social and economic outcomes are more immediately recognizable from a public policy point of view.

Particularly in the more rural provinces where visual arts infrastructure is very limited, priority is given to investment in craft projects and organisations, where social and economic outcomes are more immediately recognizable from a public policy point of view.

7.6 Local Government

Local government does not generally play a direct role in the provision of grant funding. This is both a function of the public finance management framework that local government operates within (the Municipal Finance Management Act) which does not accommodate the

disbursement of grants, and of the fact that the resources of local government are substantially more constrained than is the case with the other spheres of government. It is only in the major Metropolitan municipalities any investment in the visual arts is possible – this generally happens in three ways:

- The regularised funding of municipal museums and municipally owned community art centres (addressed in ensuing section)
- The development of institutional and capital infrastructure which supports the arts
- The commissioning of projects – exhibitions, festivals and the like.

The City of Johannesburg (CoJ) has been the most active municipality in the latter two areas within the visual arts. The CoJ was involved in the setting up of the Joburg Art Bank in the mid 2000s, an agency involved in purchasing work from artists and making this work available on a for-hire basis to government departments and corporate clients. The City has also commissioned a volume of public art during the course of the last five years, much of it through the Johannesburg Development Agency, and the majority of work located in the inner city of Johannesburg. The City of Cape Town, the Ethekwini Municipality and the Nelson Mandela Bay Municipality have all also been involved in the procurement of public art over the last two years, much of it linked to the 2010 Soccer World Cup. These are all however projects which have been procured against a terms of reference, and the resources attached to them are only accessible to artists through a competitive bidding process.

7.7 International Funding

As noted in the preceding section, international funding of the arts played a significant role during the 1970s and 80s in South Africa in promoting alternative creative work within the larger context of the liberation struggle. In line with the provisions of the White Paper, the Cultural Development and International Cooperation Programme within the national Department has been involved in negotiating a number of bilateral agreements which have involved investment in the arts from other countries in the post-apartheid period. These have included funding agreements with Flanders (focused on community arts and local cultural policy development) and Sweden (focused on collaborative projects between art museums in the two countries). These programmes have not generally involved a process of open calls for applications to the arts sector, and have usually been developed around particular organisations and public institutions. This has sometimes been cause for concern within the arts community, with the Department being viewed as a gatekeeper for international funding.

International funders have also continued to play a significant role in the direct funding of projects and organisations, without any direct interface or connection with the national Department. This funding is usually linked to ideas of exchange and collaboration between artists and organisations from different national contexts. This kind of direct international funding has also not been as encumbered as local funding agencies with expectations around developmental impact. The small sample of the major funding agencies from whom funding information could be accessed for this report suggests that direct international funding accounted for approximately 22% of all funding for the visual arts in the 2008/9 financial year. The actual proportion is likely to be substantially higher.

Figure 112: International Funding: All Arts vs Visual Arts (2007-9)

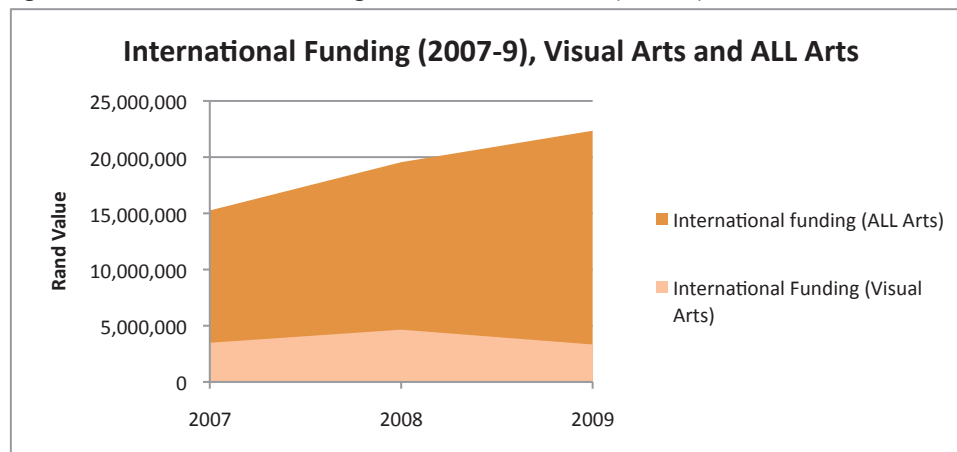
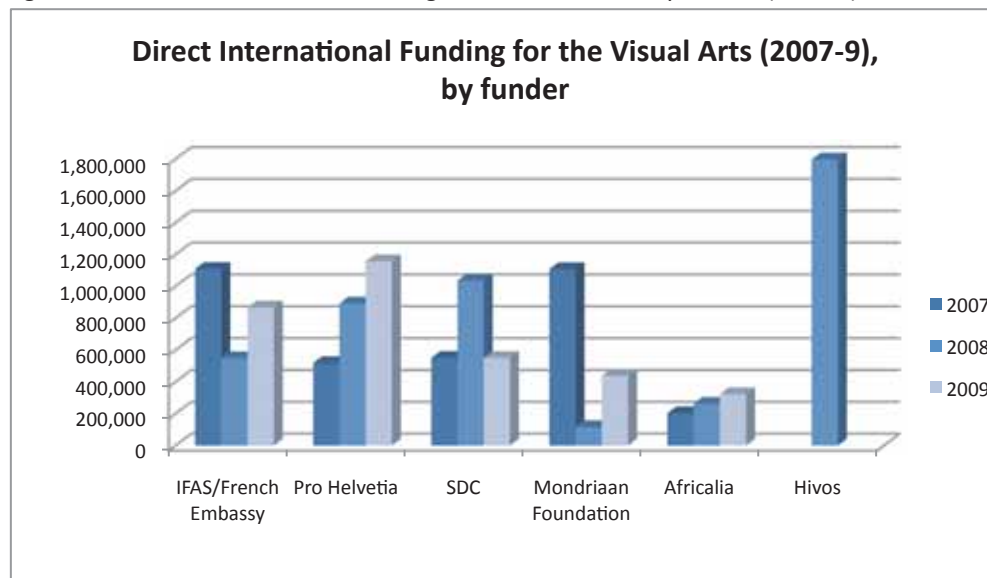


Figure 113: Direct International Funding for the Visual Arts, by Funder (2007-9)



7.8 Corporate Sponsorship and Tax Benefits

Successive versions of the King Report on Corporate Governance have increasingly compelled the corporate sector to consider social investment as a core concern of the private sector in building a conducive environment for business in South Africa. This has led to the rise of Corporate Social Investment (CSI) programmes, many of which have an arts and cultural component. The Trialogue annual survey of CSI investment for 2009 lists 22 corporate entities who have CSI programmes which include the arts.

While it was not possible within the scope of this research to get accurate figures for the proportion of corporate sponsorship and investment in the visual arts sector, the BASA Artstrack 2009 research report also provides some important insights into corporate support for the arts. The report estimates that in 2009, the corporate sector would spend in the region of R358 million on sponsorships across all arts disciplines – about 10-12% of what is

was envisaged to spend on sports sponsorships in the same year. Of this amount, nearly half (R173 million) would be accounted for through the sponsorship of music events¹⁰.

Overall sponsorship of the visual arts by the corporate sector can be estimated at between R10 and R15 million per annum – a significant portion of this being accounted for through First National Bank's sponsorship of the Joburg Art Fair, and the support of Spier Holdings for the Africa Art Centre programmes, which include the Spier Contemporary Art Competition.

Tax Benefits

The White Paper for Arts Culture and Heritage envisaged that the Ministry would “explore how the current frameworks may best be utilised for such tax efficient donations, and at the same time seek to widen tax benefits for the promotion of the arts, culture and heritage.” In the United States for example, tax incentives have played a far more significant role than direct funding for the visual arts sector, as noted by a Rand Corporation study on the Visual Arts in America:

“The creation of tax incentives for philanthropy as part of the new federal income tax in 1913 and 1918 was a boon for museums and other arts organisations thereafter... [government's] primary influence on the operation of [the visual arts system] system is largely indirect, via regulations, tax policies, and other government actions that create incentives for private individuals to act in particular ways... indirect government support for the arts through tax policy provides considerably more funding for the arts than does direct funding.”¹¹

In the South African context, modest provision exists within section 18(A) of the Income Tax Act of 1963 for donations to organisations registered as Public Benefit Organisations to be tax deductible. This provision applies to any amount that is less than 10% of the donating entity's taxable income in a given financial year, up to a maximum of R100 000 per annum. Originally this provision only applied to religious, charitable and educational activities. Though the Katz Commission of Inquiry (1999) widened the application of this provision to explicitly encompass non-profit activities in the arts and cultural sector, this provision has however not been very widely utilised in the arts sector. Reasons for this include widespread ignorance of the precise nature of the benefits on the part of non-profit organisations¹², as well as general disinterest from the corporate sector. Business and Arts South Africa's Artstrack 2009 research report notes that 79% of corporate respondents to the survey indicated no special preference for supporting organisations that have this tax status¹³. Anecdotal evidence suggests that the bureaucratic complexities (and potential scrutiny of company's tax affairs) that accompany the usage of this provision outweigh the benefits.

The likelihood of a more robust set of tax benefits being successfully advocated for seem small beyond the changes effected through the Katz Commission of Inquiry. Appeals from the publishing industry regarding the reduction or abolition of import duties on books have been rejected by the Department of Finance, which is inclined to err on the side of caution with regard to tax dispensations related to special interests, due to the potential for abuse of these arrangements.

¹⁰ Business and Arts South Africa, BMI Sport Limited. 2009. ArtsTrack 2009. BASA: Fordsburg. p. 49

¹¹ McCarthy, K. Ondaatje, E. Brooks, A & Szanto, A. 2005. *A Portrait of the Visual Arts: Meeting the Challenges of a New Era*. Rand Corporation: California. pp 10;136-7

¹² see for example: Brewis, T. 2006. A Review of the Income Tax Benefits for non-profit organisations in South Africa. Cape Town: the NGO Consortium

¹³ Business and Arts South Africa, BMI Sport Limited. 2009. ArtsTrack 2009. BASA: Fordsburg. p. 51

Brazil represents an interesting point of reference for international comparison in this area, involving a hybridized public/private funding system in an economic context comparable to our own. The so-called *Rouanet Law* introduced in 1991 establishes a framework that enables companies to claim substantial tax breaks on investment in cultural projects and organisations. Cultural organisations apply to the Brazilian Ministry of Culture to have projects approved for the purposes of tax deductibility and can then approach private sector companies, which can deduct between 30% and 100% of the sponsored amount. This system is presently under review, with a view to making these benefits accessible to a wider range of cultural organisations – one the criticisms leveled at the Law is that it privileges organisations that are already in a strong position and linked to the private sector in the major Brazilian urban centres.¹⁴

7.9 Key Issues

A number of key points can be extracted from the above review of funding patterns:

The National Arts Council has, during the period of review, functioned relatively well as a responsive grantmaking organisation in the wake of some of the governance and management crises of the early 2000s – it has managed to award a significant number of grants to the visual arts and progressively grow the visual arts share of the overall funding allocation.

The visual arts sector generally receives low levels of funding by comparison to the performing arts. This is partly a function of the organisational structures within the visual arts: these tend to be focused around individual artists rather than groups or companies as in the performing arts. The legal entities that do exist, such as galleries, are overwhelmingly commercial in character (which excludes them much public funding) and less able to effectively articulate connection to public policy goals. In the case of the National Arts Council, some progress has been made in addressing this imbalance.

International funding represents an exception to this trend – the visual arts sector benefits significantly from international funding, receiving a larger share of this funding relative to other art forms than is the case with the proportions received from most local funders. This may also be indicative of the more open-ended nature of this funding in relation to public policy goals.

There is a very marked overall skew in the allocation of national sources of visual arts funding to artists and organisations based in Gauteng – a general trend for arts funding that is even more pronounced for the visual arts. This is partly a function of the proximity of arts organisations to funding organisations, which are largely located in Gauteng, and partly a function of the fact that the capacity for effective fundraising is most concentrated in Gauteng.

The National Lottery Distribution Trust Fund represents possibly the single greatest area of blockage and weakness within the funding system for the visual arts – and also potentially the single greatest opportunity for new revenue funding for both public institutions and independent non-profit arts organisations. The funding available from the NLDTF for arts, culture and heritage is of a scale (more than ten times that of the National Arts Council) that could have a ‘sea change’ impact on the position of these organisations. In the case of

¹⁴ SICA (Dutch Centre for International Cultural Activities). 2009. Cultural Mapping Brazil. The Netherlands. Pp26-7

public infrastructure such as national and municipal museums and collections as well as community arts centres, NLDTF funding could play a major role in enhancing the capacity for new exhibitions and outreach programming, as well as the financing of infrastructure development. In the case of the independent non-profit visual arts sector, the NLDTF could play a significant role in addressing the core costs of running these organisations, which most other funding organisations are unable to or reluctant to address directly, preferring to fund project costs where linkage to a very specific outcome or product is readily apparent.

Section 8

Recommendations

The policy recommendations developed in this report have been informed by an overall analysis of the points of intersection between the visual arts and the world of public policy, institutions, legislation and programming. This report has sought to identify a set of key issues that the sector faces, and has drawn on a wide range of international precedents in developing recommendations that are appropriate and meaningful in the South African context. In doing so we have been mindful of four key considerations:

Firstly, the need to include substantial focus on growing the market for the visual arts, both domestically and internationally. The central concern of much arts advocacy revolves around supply-side interventions concerned with making available more public funding for the visual arts, whether through institutions or grants. This emphasis should not however obscure consideration for how the market and demand for the arts might be grown in a way that would mitigate the need for escalating public subsidy. Indeed, this report has shown that the visual arts is in fact one of the more independent and resilient sectors of the arts in this respect, with much of the activity in the sector operating in the absence of public money. As the funding section of this report suggests, there is in fact very substantial funding available for the visual arts, principally through the Lottery, and principally targeted at the non-profit components of the sector. The need to consider ways in which these resources can be made more readily and widely available represents a key recommendation. The balance of this report has however been more concerned with both short and medium term interventions focused around market access and stimulating demand, as well as interventions aimed at growing the audience and consumption base for the visual arts in the long term, through a concerted strategy around visual arts education through schools, art museums and community arts centres. Cutting across all these interventions should be a concern for enabling greater access to the industry on the part of historically marginalised groups.

Secondly, the need for any proposed measures to meet a basic standard of affordability. Internationally, the majority of public sector measures that have been developed around the arts in general and the visual arts in particular, have been generated in the context of the advanced economies of North America, Europe and Australasia. These economies enjoy a fiscal base which is greatly in excess of the resources that are available in South Africa. A basic principle that we have sought to adhere to in the making of specific recommendations is that any proposed intervention needs to be affordable, both in relation to the public and private resources that are available, and in relation to other pressing demands on these resources.

Thirdly, careful consideration has also been given to assessing the prospective costs and potentially negative consequences of implementing particular recommendations, weighed against the likely benefits and impact yielded through such interventions in social, economic and cultural terms. For example, implementing the Artist Resale Right assumes the establishment and sustainability of an administrative capacity to collect and distribute royalties to artists, which would need to be justified by a sufficient value and volume of transactions in the secondary market (costs). It is also a measure that is likely to be resisted by both local auction houses and international auction houses that have a presence in South Africa, as it directly impacts on the cost of doing business, and may result in business moving to other national contexts where these measures do not apply (a consequence). However, international experience suggests that such measures can yield significant revenue for artists (or their families) where comparatively meagre returns have been achieved on the primary/first sale of their work (a benefit).

A final consideration in the development of the recommendations in this report is the recognition that many of the problems of the visual arts in South Africa are in fact problems of the arts in general – the funding system and arts education being two signal examples. This report has been mindful of the fact that these more generalised problems need to be addressed through measures that have a compass beyond just the visual arts sector. This study has confined itself to noting these wider issues on the one hand, and suggesting sector-specific responses and remedies on the other, where these do not seem to exceed the mandate of the present assignment.

The report proposes a variety of recommendations for policy-driven intervention aimed at promoting the growth and transformation of the visual arts sector, and a set of key framing objectives have been derived from the preceding analysis. These objectives are focused around six mutually reinforcing key areas of impact, defined as follows:

1. Stimulating domestic and international demand for South African visual arts
2. Widening access to the experience of and participation in the visual arts
3. Strengthening the organisational infrastructure that supports the visual arts
4. Enhancing the social and economic position of artists
5. Attracting more investment and resources into the sector
6. Promoting greater coherence and cohesion in the sector and in sector-government relations

In the articulation of the ensuing recommendations, the impact of particular actions relative to each of these key objectives is noted, together with:

- An assessment of the cost of undertaking the particular intervention, relative to the envisaged impact. Each recommendation is qualified by a very broad indication of the cost involved in implementing the recommendation, as follows:

Level of Investment	Cost range
Low	Less than R2 million
Medium	R2-R5 million
High	R5 million +

- An assessment of the immediacy of impact and how long it would take to realise the recommendation

Immediacy	Timeframe
Short term	Within a year
Medium term	Within 1 – 3 years
Long term	3 years +

- A consideration of whether actions and investments are **once-off** or **recurrent**. In the case of recurrent investments, the importance of clarifying and determining the locus of responsibility for these functions within government is emphasised.
- A consideration of key roleplayers that would need to be involved in the realisation of each recommendation.

Recommendation 1: Engage the sector and government in the review, consolidation and effecting of the findings and recommendations contained in this report.

Strategic Linkages: Promoting Coherence

It is recommended that a national task team – the Visual Arts Industry Task Team (VATT) – be constituted through the convening of a national conference/summit of stakeholders in the visual arts industry, where the findings and recommendations contained in this report can be subjected to wider interrogation and scrutiny as a basis for taking them forward.

The task team would be composed *inter alia* of nominated representatives from the following groupings:

- Artists
- Galleries and Auction houses
- Independent platforms for the visual arts
- Visual Arts Development organisations
- Artist Associations and Industry bodies
- Tertiary institutions
- Government departments at a national, provincial and local level with a stake in or regulatory mandate over the visual arts sector

The functions of the Task Team would be to:

- Review the recommendations contained in this report
- Agree on a consolidated set of recommendations
- Provide leadership and oversight with regard to the implementation of these recommendations
- Ensure consultation and communication with the widest possible cross-section of the visual arts sector with regard to the implementation of these recommendations

The DAC would convene the proposed conference with partners, and provide secretariat support to the work of the proposed Task Team.

Key roleplayers: DAC, other government departments, industry stakeholders

Timeframe: Short-Medium

Cost: Low

Recommendation 2: Support regional market development initiatives that grow the local and regional consumption base for the visual arts

Strategic Linkages: Stimulating Demand

Provide targeted support for innovative local and regional initiatives across urban and rural contexts - and differentiated for the contemporary and commercial segments - that encourage new buyers, create buzz, make the industry and the market more visible through for example art maps, art tours, open studio projects, art nights, new approaches to marketing and the like.

Key Roleplayers: DAC, provincial departments of Arts and Culture and Economic Development, Business and Arts, tourism agencies, gallery networks, entrepreneurs, dti
Timeframe: Short-Medium
Cost: Low

Recommendation 3: Invest in innovative buyer education and development initiatives

Strategic Linkages: Stimulating Demand

Provide targeted support for innovative projects aimed at attracting particularly entry-level buyers into the market through print, on-line resources and events that promote the benefits of buying art and provide advice and guidance on how to go about it.

Key roleplayers: DAC, Business and Arts South Africa, industry organisations, art publishers.
Timeframe: Short
Cost: Low

Recommendation 4: Investigate the development of the Joburg Art Bank as a national scheme

Strategic Linkages: Stimulating Demand; Enhancing the Position of Artists

Working with the City of Johannesburg and the National Arts Council, commission an assessment of the position of the Joburg Art Bank and a business plan for the development of the agency as a scheme with national reach, and with a core focus on cultivating demand for innovative work from particularly younger artists entering the market among both private and public sector entities, as well as in the cultivation of entry-level buyers among the employees of these entities. Such a plan should involve consultation with the commercial gallery system in order to address potential concerns regarding the impact of such a scheme on the commercial market. The future of such an agency will be contingent on there being sustained investment in acquisitions on the one hand, and a professional and informed acquisitions programme, marketing strategy and general leadership and management on the other.

Key roleplayers: City of Johannesburg, National Arts Council
Timeframe: Short (review and business plan) Medium-Long (institutional development)
Cost: Low (review and business plan); High (institutional development)

Recommendation 5: Investigate the feasibility of instituting a zero percent art purchasing scheme

Strategic Linkages: Stimulating Demand

As previously noted, interest free art purchase schemes for the visual arts for entry level buyers and middle income earners can play a significant role in making the buying of the visual arts more accessible to more people. It is recommended that the Department develop this concept through engagement with Business and Arts South Africa and commission more detailed research on models internationally.

Key roleplayers: DAC, BASA, Joburg Art Fair, Joburg Art Bank, local financing institution.

Timeframe: Short (feasibility) Medium (implementation)

Cost: Low

Recommendation 6: Facilitate access to dti incentives and subsidies for the promotion of South African visual arts at trade fairs internationally

Strategic Linkages: Stimulating Demand

The DAC should play a role in facilitating access to Department of Trade and Industry financing, incentive and rebate schemes associated with addressing the cost of taking South African artists and their work to international trade events, aimed at galleries operating both at the contemporary and commercial/decorative arts end of the visual arts spectrum. The DAC should engage the dti and its linked agencies (e.g. TISA) on rendering these schemes more accessible to the visual arts sector, and packaging information on these schemes, and the export of artwork more generally, should be developed. Develop with reference to lessons learnt from similar endeavours in the craft sector.

Key roleplayers: DAC, dti

Timeframe: Short to medium term

Cost: Low-Medium

Recommendation 7: Promote the more widespread commissioning of public art, particularly through local government

Strategic Linkages: Widening Access; Enhancing the Position of Artists; Attracting Investment

The experience of public art commissioning in Johannesburg in particular has demonstrated the impact of public art not only on the public realm, but also the important economic benefits derived by artists. It is recommended that the DAC should play a role in promoting a more policy-driven approach to the commissioning of public art in other contexts, using the example of Johannesburg as a case study, together with reference to initiatives that have been undertaken in the Nelson Mandela Bay Municipality, Cape Town and Durban.

It is suggested that this should be achieved through convening a national summit on public art which would serve both to advocate the commissioning of public art more widely across the country, based on best practice examples both locally and internationally. The summit would also involve the sharing of best practice with regard to local government policy in this regard (e.g. the percent for art policy of the City of Johannesburg), the role of government and external specialists in the management of commissioning processes, municipal financial management systems and the resourcing of public art projects through municipalities securing resources through existing mechanisms such as the National Lottery Distribution Trust Fund.

Role players: DAC, municipalities, South African Local Government Association, key local government stakeholders and other departments and agencies that may have an interest in the commissioning of public art (e.g. the Roads Agency, the department of Public Works), the National Lotteries Distribution Trust Fund, industry organisations that have been involved in the commissioning of public art.

Timeframe: Short

Cost: Medium-High

Recommendation 8: Provide targeted support for the representation of South African art in contemporary art events on the continent and internationally

Strategic Linkages: Stimulating Demand

Biennales and a variety of other similar international platforms provide important opportunities for growing the profile of South African artists internationally and impact on their value and selling power. A particular emphasis should be placed on synergy with the increasing number of innovative new platforms developing across the African continent, and the encouragement of market linkages. The department should establish a high profile curatorial team through a process of public nomination which would advise the department on an ongoing basis with regard to the identification of platforms and the selection of artists. The department should facilitate linkage with the strategies and programmes of adjacent departments and agencies which have a complementary interest in the positive representation of South Africa internationally.

Key roleplayers: DAC, Department of Tourism, Department of International Relations and Cooperation, International Marketing Council of South Africa (Government Communication and Information System)

Timeframe: Short-Medium

Cost: Medium

Recommendation 9: Conduct a feasibility study for the development of a major contemporary art museum for the country

Strategic Linkages: Strengthening Infrastructure; Widening Access

While the majority of art museums and collections in the country have significant collections of contemporary South African art and associated exhibitions programming focusing on contemporary practice, the country does not have a major national institution dedicated to the presentation of contemporary art practice and the fostering of new domestic and tourist audiences along the lines of institutions such as the Tate Modern, the various Guggenheim museums and so on. While the development of such an institution has at various moments been contemplated by role-players in the public and private sector in both Cape Town and Johannesburg, these proposals have remained at a concept stage. While this study remains agnostic on the desirability and affordability of such an institution in the South African context and proposes that any such initiative would need to be predicated on major corporate investment, it is recommended that a scoping study be commissioned that draws on both local and international experience and expertise and international precedents and expertise. Such a study would need to consider:

- The rationale for developing such an institution in the South African context
- The role and functions of such an institution
- Options for the location/s of such an institution giving due consideration to the need to generate significant audiences and revenue, and whether such an institution should consist of a single substantial piece of infrastructure in one location, or be dispersed in more modest form across a number of locations.
- whether such an entity should be a stand-alone entity, or an extension of an existing institution/s
- Infrastructural and recurrent costs
- Financing and partnership models and approaches to sustainability.

Such a study should have as an explicit part of its brief the development of an informed framework for attracting and incentivising major corporate investment/s in such an initiative.

Key roleplayers: DAC (commissioning of scoping study)

Timeframe: Short (scoping), Long (Institutional development)

Cost: Low (scoping), High (institutional development)

Recommendation 10: Invest in joint/touring exhibitions and outreach programming, and strengthen the institutional network that supports such programming

Strategic Linkages: Widening Access; Strengthening Infrastructure

The report has noted that touring exhibitions and outreach programming represent a cost-effective way in which such programming – which involves substantial research and development costs – can impact beyond individual institutions and their audiences.

It is recommended that national funding be made available for developing joint exhibitions and outreach programmes which builds on and strengthens the existing co-operative relationships between art museums and collections across the country. Such programming should be aimed not only at enabling exhibitions to travel, but should also be linked to innovative outreach programmes and resources to travel with them, linking into schools and community arts centres.

This funding should ideally be made available either through an additional allocation to the National Arts Council for this purpose, or be directly funded by the national Department. Complementary finance for touring exhibitions and outreach programming should be secured from provincial departments responsible for arts and culture, and partnership with independent arts organisations and galleries encouraged in the development of such projects. The funding should include provision for enabling a Forum or Network of Art Museums and Collections composed of representatives from institutions which would meet on a quarterly basis to:

- Develop a workable model for the joint management of such a programme, and the allocation of resources between institutions
- Develop a 3 year programme for touring exhibitions and outreach programmes
- Develop detailed 3 year plans and budgets for joint exhibition and outreach programmes
- Secure complementary resources from provincial and local government
- Monitor and evaluate

The membership of such a forum or network would also include representatives from provincial departments. Ancillary purposes would include the development of best practice with regard to outreach programming, a bank of educational resources, and a shared network for the dissemination of these resources.

Key Roleplayers: DAC, National Arts Council, provincial departments

Timeframe: Medium and ongoing/recurrent

Cost: Medium/recurrent

Recommendation 11: Strengthen the acquisitions capacity of public art museums and collections through matching grant scheme

Strategic Linkages: Widening Access; Strengthening Infrastructure; Attracting Investment

Consideration should be given to the development of a nationally financed matching grant scheme to support new acquisitions. This would involve corporate investment in new acquisitions for public art museums and collections being matched by an acquisitions grant from national government, which could be administered through Business and Arts South Africa – which already has a similar scheme in operation for grant funding on this basis.

Key roleplayers: DAC, Business and Arts South Africa, funding bodies.

Timeframe: Medium and ongoing/recurrent

Cost: Low once-off (development of policy); Medium, recurrent (matching grant scheme)

Recommendation 12: Strengthen the capacity of municipal museums and collections to attract external funding and earned income

Strategic Linkages: Widening Access; Strengthening Infrastructure; Attracting Investment

This report has noted some of the difficulties that municipal museums and collections experience as entities of local government with regard to attracting funding and resources for programming and the reinvestment of earned income. The DAC should engage with museums and collections, as well as local government structures, around developing workable and effective models for museums and collections to attract and utilise external resources. Consideration should be given to the implications of the Municipal Finance Management Act, and the use of associated 'Friends Of' organisations and Trusts as vehicles for generating substantial additional income for art museums and collections.

Role-players: DAC, South African Local Government Association, Local government officials responsible for art museums and collections

Timeframe: Short

Cost: Low, once-off

Recommendation 13: Action national strategy for community art centres

Strategic Linkages: Widening Access; Strengthening Infrastructure

The report notes the existence of a national policy and strategy for the development of community arts centres. The findings of this report support the progressive implementation of this policy and strategy and proposes that a mechanism should be established for ensuring the strategy is implemented in such a way that:

- The visual arts are accorded a priority in the development of the strategy alongside other disciplines
- Particular attention is given to the creation of employment and training opportunities for artists and project funding opportunities for visual arts development organisations in the implementation of the proposed strategy
- Resources are made available to ensure that the touring exhibitions and outreach programming of public museums and collections is integrated into such a strategy (recommendation 10)

Roleplayers: DAC, provincial and local government, arts development organisations, National Federation of Community Arts Centres
Timeframe: Medium
Resources: Medium

Recommendation 14: Invest in professional development and mentoring programmes and resources for visual arts practitioners

Strategic Linkages: Enhancing the Position of Artists

Financial support should be provided for the development of courses, resources and workshops focused on preparing artists more effectively for dealing with the demands of professional practice (including legal and financial skills and knowledge), understanding the market for the visual arts, and the development of entrepreneurial skills. Advisory resources and guidelines for the conduct of commercial relationships between artists, gallerists and dealers should be developed in consultation with the industry.

Targeted funding should be made available to initiatives aimed at supporting market access and development for young, emerging and recently graduated artists, assisting them with accessing industry networks, exhibition opportunities and space to work.

There are a number of existing initiatives in this area, so the focus of the strategy should be on enhancing the capacity of these initiatives to deliver quality training to a wider cross-section of the visual arts community. The Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority (MAPPP SETA) should be actively engaged by the Department as a financing partner, and to ensure that – where appropriate – these existing initiatives are drawn into an accredited framework for training.

Roleplayers: DAC, National Arts Council, MAPPP SETA, tertiary institutions, industry-training organisations and development initiatives
Timeframe: Short
Cost: Low

Recommendation 15: Investigate the feasibility of instituting artist resale rights – and the collective management of other creative rights for artists - in the South African context

Strategic Linkages: Enhancing the Position of Artists

The report has found that artist resale rights, copyright collection and exhibition payment schemes all represent significant mechanisms for artists to generate ongoing income from their creative work, and have now been instituted in a very wide range of national contexts. The report also notes that there are currently inadequate mechanisms in place to address any form of collective rights management for visual artists. It is proposed that the DAC should commission an inquiry into the feasibility of instituting these rights in the South African context.

Such an inquiry should involve a detailed examination of the likely revenue base for the institution of these rights, which would include an analysis of the selling patterns of auction houses (and where possible) dealers, as well as the variety of contexts in which copyright collection and exhibition payments might apply. The inquiry would review international models in each of these areas and bring together legal, financial and industry expertise, with a view to determining:

- The likely scale of financial benefit to artists generally versus the cost of administering such rights, with a particular focus on the scale of benefit to low and middle-earning artists, and to artists from historically disadvantaged communities
- The consideration of different approaches to the institution of such schemes, including consideration of an institutional framework, a model for sustainability and the extent to which all of these rights related payments might be managed by a single entity
- The likely impact (positive and negative) of such schemes on the visual arts market and the industry as a whole
- Recommendations and plans for a model for implementation

Roleplayers: DAC, Department of Trade and Industry, auction houses, dealers, publishers, industry organisations

Timeframe: Short (report and business plan) Medium (implementation)

Cost: Low (report and business plan) Medium (implementation)

Recommendation 16: Establish protocols, guidelines, standards and minimum rates for the employment, contracting or commissioning of creative work from artists

Strategic Linkages: Enhancing the Position of Artists; Promoting Cohesion

It is proposed that the Department should – with the oversight of the proposed Visual Arts Task Team – commission the development of a set of guidelines and protocols, standards and minimum rates for the commissioning, contracting and employment of artists to do creative work. In the first instance, such protocols and guidelines should focus on providing guidance and a set of minimum standards for public institutions, departments and agencies in their interaction with visual artists. The development of such a resource should also however include proposals for a code of conduct for the industry more generally, addressing in particular the more professional articulation and management of commercial relationships between artists and gallerists.

The development of such a resource should involve both consideration of international examples of such guidelines and protocols, as well as the widest possible consultation with industry organisations, artist associations, public institutions and local and provincial government in the development of the proposed framework. An additional purpose of such consultation would be concerned with educating both public officials and artists about the variety of issues that should be addressed in the negotiation of these working relationships, in the interests of ensuring that both parties are adequately protected. Such education should extend to particular consideration of the moral and intellectual rights artists have over their creative work, and the need for these to be addressed and protected in agreements that artists may enter into with both private and public sector entities.

Roleplayers: DAC, local and provincial government, artist associations, industry organisations
Timeframe: short
Cost: low

Recommendation 17: Develop and implement nationwide artists-in-schools scheme

Strategic Linkages: Widening Access; Enhancing the Position of Artists

This report has noted the dearth of available skills in the majority of schools in South Africa for the effective implementation of the arts and culture and visual arts curricula in primary and high schools. Practicing artists have the potential to make a major contribution in addressing this gap, as evidenced by pilot programmes undertaken in the Free State, Gauteng, Limpopo and Kwazulu-Natal. Such programmes also create alternative income streams for artists and have the potential to promote linkage and resource sharing between schools and community arts centres. They also have the potential to achieve significant impact in schools in the most disadvantaged areas of the country.

Working with provincial departments of education, provincial departments of arts and culture, tertiary institutions and arts development organisations, a nationwide artists-in-schools programme should be developed which involves the training, placement and supervision of artists in schools in support of both curricular and extra-curricular activities. Such a scheme should extend beyond the visual arts into other arts disciplines, and it should operate at both a General and Further Education level. Linkage between such programmes and the service learning requirements of university art schools should be developed. Universities and arts development organisations would be involved in the training, placement and supervision of artists working in schools. Finance should be secured both nationally and provincially on a matching grant basis, with the DAC and DoE playing an overall coordination and programme development role. The programme should also involve the organised sharing of best practices and the development of guidelines and resources for the effective implementation of the scheme.

The potential for such a scheme to catalyse the creation of a coordinating body for the promotion of extra-curricular/school enrichment programmes along the lines of USSASA (the United Schools Sports Association of South Africa) should also be explored.

Key roleplayers: DAC, Departments of Basic and Higher Education, provincial departments (education, arts and culture), tertiary institutions, and arts development organisations.
Timeframe: Medium-Long
Cost: High

Recommendation 18: Review the position of FET colleges in the training of artists

Strategic Linkages: Widening Access; Strengthening Infrastructure

This report has noted that FET colleges have historically played a marginal role in the training of professional artists – yet international experience suggests that they have the potential to provide an important and affordable alternative point of access into the industry, particularly for artists operating at the more ‘commercial’ end of visual arts practice. It is proposed that the DAC should engage the Department of Higher Education and FET colleges offering courses in the visual arts in a review of these programmes, with a view to identifying needs in respect of curriculum development, infrastructure and more effective industry linkage.

Key roleplayers: DAC, Department of Higher Education, FET colleges.

Timeframe: Short

Cost: Low

Recommendation 19: Review the position of art schools at historically disadvantaged institutions

Strategic linkages: Widening Access, Strengthening the Infrastructure

The report suggests that the history of underinvestment in art schools attached to historically black universities has been sustained (and in certain cases deepened) in the post-1994 period. The future development of art schools at historically black universities should be the subject of detailed investigation, focusing on the strategic position of these entities, and their needs with respect to:

- The development of a strategic vision and distinct offer
- Infrastructure development
- Curriculum development
- External partnerships and International linkage
- Diversifying and increasing the revenue/funding base

Key Roleplayers: DAC, Department of Higher Education, tertiary institutions

Timeframe: Short

Cost: Low

Recommendation 20: Promote transformation and equity in the sector through targeted support for creative, leadership and management training

Strategic Linkages: Widening Access; Strengthening Infrastructure

This report has noted in various places problems associated with black people accessing the visual arts sector, both within the realm of professional practice as artists, as well as in the leadership and management of institutions, businesses and organisations. The inclusion of equity criteria in the process of appointments for public institutions is clearly inadequate in the absence of programmes which ensure that there is a supply of skilled and experienced black professionals in a position to take up these positions.

The DAC should on the one hand consider additional funding for the National Arts Council's existing bursary programme scheme targeted specifically at young black artists and curators at both an undergraduate and postgraduate level. Consideration should also be given to the provision of 'art leadership grants' for tertiary institutions, public art museums, galleries and non-profit organisations to enable study, international travel and experience targeted specifically at black middle and senior managers, academics, entrepreneurs and curators.

A comprehensive approach to addressing this issue should be developed in consultation with the National Arts Council and tertiary institutions as the primary providers of the high level skills-sets under consideration.

Key Roleplayers: DAC, National Arts Council, tertiary institutions, public museums and collections.

Timeframe: Short-Medium

Recommendation 21: Promote greater coherence, articulation and efficiency in the funding system for the visual arts

Strategic Linkages: Strengthening Infrastructure; Attracting Investment; Promoting Coherence

It is proposed that a focused series of meetings be convened by the DAC with the full spectrum of institutions, bodies and agencies involved in the funding of the visual arts in South Africa – this should be done on the back of the national conference/Summit proposed in Recommendation 1, and should be informed by the consolidated findings regarding key industry needs and proposed interventions. This engagement would be aimed at addressing duplication of efforts and developing a more co-operative and targeted approach to funding within the current funding landscape. Such a process of engagement would seek to produce:

- A clearer articulation between funding bodies of roles, areas of responsibility and priority, and target groups in relation to areas of identified need within the industry
- The development of more efficient mechanisms for information and data sharing between funders, and with the visual arts sector
- In the case of governmental agencies, investigating options around the development of integrated grant management systems able to speak to one another, and addressing the specialised training needs of funding officers and administrators
- The development of a funding map and advisory resources that would serve as a guide for individuals and organisations within the sector as to who to approach for what kind of funding.

Such meetings should include membership drawn from the proposed Visual Arts Task Team (see recommendation 1). Notably, such an approach could serve as a template for engagement with other parts of the arts/creative industries.

Roleplayers: DAC, funding agencies

Timeframe: Short

Cost: Low

Recommendation 22: Review the role and position of the NLDTF in resourcing the arts sector.

Strategic Linkages: Attracting Investment; Strengthening Infrastructure

The implementation of many of the recommendations contained in this report relies on resources which are not foreseeably available within the national department or its counterparts at a provincial and local level. The report has also noted the accumulation of substantial unspent monies vested in the National Lottery Distribution Trust Fund (NLDTF), and the fact that the overall grant funding for arts, culture and heritage available through the NLDTF substantially exceeds the **combined** value of all other grant funding sources.

It is proposed that a high level engagement with the National Lotteries Board and the Ministry of Trade and Industry should be undertaken, aimed at promoting the position of the NLDTF as the single most significant funder of the non-profit arts sector in the country, and ensuring that these resources are deployed in a manner which synergises with an overall industry development strategy for the visual arts. Consideration should also be given to how to ensure that the grant management systems and capacity of the NLDTF/NLB correlates with the scale of finance vested in the body. The potential complementary role of other statutory funding agencies in acting as intermediary agents for the distribution of Lottery funding, should be carefully examined, drawing on international precedents such as the partnership between the UK Lottery and the Arts Council of England.

This would involve briefing the dti, NLB and NLDTF on key sector needs noted elsewhere in this report, and establishing an ongoing mechanism for communication and cooperation between the department and the NLB/NLDTF in this regard, as contemplated within the governing legislation for the NLB/NLDTF. Specific priorities to be promoted in relation to the needs of the visual arts sector include:

- Exhibitions and outreach funding for art museums and collections and community arts centres
- Core running and project costs for independent visual arts development organisations and spaces, industry bodies and associations, particularly those focused on providing opportunities for young artists entering the industry
- Major projects which promote the visibility and impact of the visual arts in public life, including public art projects
- Funding for visual arts education and training programmes in schools, including artists-in-schools programmes
- Funding for professional development programmes for artists, particularly those entering the industry

Key roleplayers: DAC, NLDTF/NLB, dti

Timeframe: Short

Cost: Low

Recommendation 23: Establish a joint task team with the Department of Finance and SARS to investigate arts-specific tax benefits and incentives aimed at stimulating entrepreneurship and encouraging corporate investment

Strategic Linkages: Attracting Investment

This report has noted a variety of limitations that attach to existing tax benefits that accrue on donations from corporate bodies to arts organisations and institutions under Section 18(A) of the income Tax Act. It has also noted a variety of schemes that pertain internationally with regard to tax benefits for artists, creative businesses and organisations. It is proposed that the DAC should initiate the formation of a joint working group or similar mechanism with the Department of Finance and the South African Revenue Services that would be aimed at:

- Reviewing the existing provisions for benefits to the arts under the Income Tax Act
- Commissioning detailed research into the variety of benefits and incentives that exist internationally in relation to the tax deductibility of donations on the one hand, and the taxation of artists, creative businesses and organisations on the other, together with an assessment of the feasibility of instituting similar measures in the South African context.

The working group should also include industry representatives drawn from the proposed Visual Arts Industry Task Team.

It is additionally recommended that a promotional booklet be developed around the existing tax benefits so as to encourage wider usage of these provisions by visual arts organisations and the corporate sector.

Key Roleplayers: DAC, Department of Finance, SARS

Timeframe: Short-Medium

Cost: Low-Medium

Recommendation 24: Commission research on an ongoing basis that provides up-to-date industry data as a basis for monitoring and evaluating the impact of proposed interventions, and identifying new areas of need

Strategic Linkages: Promoting Coherence

The present research project has represented a significant first step in developing a knowledge base around the visual arts that can begin to provide both the industry and government with an informed basis for industry development strategies at a micro and macro-level. It is proposed that a standardised framework for this research be generated drawing on methodological insights gained through the present project, to be implemented every three years through a partnership between one or more tertiary institutions, industry organisations and the department. A successful precedent for this kind of programme has been established within the publishing sector, where a survey of the industry is conducted on an annual basis through a partnership between the DAC, the Publishers Association of South Africa (PASA) and the University of Pretoria.

Key roleplayers: DAC, tertiary institutions, industry organisations

Timeframe: Medium, recurrent

Cost: Low

Appendix A: Artist Survey Data

1. Basic Details and Overview

1.1 Age

Professionals only	N	mean	p25	p50	min	max
Gauteng	66	38	28	35	23	74
Western Cape	57	45	34	43	23	87
Kwazulu Natal	47	41	31	38	23	75
Free State & EC	33	37	27	34	22	66
Other provinces	40	41	31	41	22	68
Total	243	40	30	38	22	87

Age	N	%	cumulative
20-25	19	8	8
26-35	90	37	45
36-45	57	23	68
46-55	41	17	85
56-70	31	13	98
> 70	5	2	100
Total	243	100	

1.2 Gender

Gender	N	N
Male	123	50
Female	122	50
TOTAL	245	100

N (Professionals only)	F	M
Gauteng	36	30
Western Cape	37	21
Kwazulu Natal	16	31
Free State & EC	15	19
Other provinces	19	21
Total	123	122

% (Professionals only)	F	M
Gauteng	55	45
Western Cape	64	36
Kwazulu Natal	34	66
Free State & EC	44	56
Other provinces	48	53
TOTAL	50	50

1.3 Race

Race	N	%
Black	80	33
Coloured	14	6
Indian_Asian	8	3
White	140	58
TOTAL	242	100

N (Professionals only)	Black	Coloured	Indian_Asian	White	TOTAL
Gauteng	25	3	1	36	65
Western Cape	5	2	3	46	56
Kwazulu Natal	21	1	3	22	47
Free State & EC	17	0	0	17	34
Other provinces	12	8	1	19	40
TOTAL	80	14	8	140	242

% (Professionals only)	Black	Coloured	Indian_Asian	White
Gauteng	38	5	2	55
Western Cape	9	4	5	82
Kwazulu Natal	45	2	6	47
Free State & EC	50	0	0	50
Other provinces	30	20	3	48
TOTAL	33	6	3	58

Gender and Race	N	%
Black Male	72	30
Black Female	30	12
White Male	49	20
White Female	91	38
TOTAL	242	100

N (Professionals only)	BM	BF	WM	WF
Gauteng	15	14	15	21
Western Cape	8	2	12	34
Kwazulu Natal	21	4	10	12
Free State & EC	14	3	5	12
Other provinces	14	7	7	12
Total	72	30	49	91

% (Professionals only)	BM	BF	WM	WF
Gauteng	23	22	23	32
Western Cape	14	4	21	61
Kwazulu Natal	45	9	21	26
Free State & EC	41	9	15	35

Other provinces	35	18	18	30
Total	30	12	20	38

1.4 Home Language

Language	N	%
Afrikaans	48	20
English	107	44
IsiZulu	25	10
SeSotho	13	5
IsiXhosa	11	5
Sepedi	6	2
SiSwati	8	3
Other	25	10
TOTAL	243	100

N	Afrikaans	English	IsiZulu	SeSotho	IsiXhosa	Sepedi	SiSwati	Other	TOTAL
Gauteng	12	26	6	2	1	5	2	10	64
Western Cape	13	40	1	0	4	0	0	0	58
Kwazulu Natal	1	23	16	2	1	0	0	4	47
Free State & EC	7	10	2	8	5	0	0	2	34
Other provinces	15	8	0	1	0	1	6	9	40
TOTAL	48	107	25	13	11	6	8	25	243

%	Afrikaans	English	IsiZulu	SeSotho	IsiXhosa	Sepedi	SiSwati	Other
Gauteng	19	41	9	3	2	8	3	16
Western Cape	22	69	2	0	7	0	0	0
Kwazulu Natal	2	49	34	4	2	0	0	9
Free State & EC	21	29	6	24	15	0	0	6
Other provinces	38	20	0	3	0	3	15	23
TOTAL	20	44	10	5	5	2	3	10

1.5 Nationality

Other include, Lesotho, Dutch, Mozambique, Nigeria, Kenyan, Nigerian and Chinese

Nationality	N	%
South African	222	91
British	4	2
German	3	1
Irish	3	1
Zimbabwean	3	1
Other	9	4
TOTAL	244	100

N	South African	British	German	Irish	Zimbabwean	Other	Total
Gauteng	58	1	2	0	2	3	66

Western Cape	53	2	0	1	0	2	58
Kwazulu Natal	41	1	1	2	0	2	47
Free State & EC	32	0	0	0	0	2	34
Other provinces	38	0	0	0	1	0	39
TOTAL	222	4	3	3	3	9	244

%	South African	British	German	Irish	Zimbabwean	Other
Gauteng	88	2	3	0	3	5
Western Cape	91	3	0	2	0	3
Kwazulu Natal	87	2	2	4	0	4
Free State & EC	94	0	0	0	0	6
Other provinces	97	0	0	0	3	0
TOTAL	91	2	1	1	1	4

1.6 Survey Follow Up

Do you want to receive follow up information about this research project? (reports on findings etc)

Info	N	%
No	20	8
Yes	225	92
TOTAL	245	100

1.7 Amateur vs Professional

Which of the following applies most to your practice? (single response)

Practise	Amateur	Professional	TOTAL
N	38	245	283
%	13	87	100

N	Amateur	Professional	Total
Gauteng	5	66	71
Western Cape	18	58	76
Kwazulu Natal	5	47	52
Free State & EC	3	34	37
Other provinces	7	40	47
TOTAL	38	245	283

%	Amateur	Professional
Gauteng	7	93
Western Cape	24	76
Kwazulu Natal	10	90
Free State & EC	8	92
Other provinces	15	85
TOTAL	13	87

1.8 Scope of Work Activities

Which of the following activities do you undertake in the course of your work as a visual artist? (multiple response)

Activity	N	%
Education and training services	134	55
Research	105	43
Support services to artists	63	26
Art materials supplier	10	4
Materials manufacture	11	4
Materials retail	11	4
Producing artwork	227	93
Production/project management, incl commissioning services	48	20
Managing/promoting artists	33	13
Curating exhibitions/projects	55	22
Designing/installing artworks/exhibitions	69	28
Selling artwork	121	49
Framing services	14	6
Conservation/restoration services	13	5
Marketing and publicity services	29	12
Art publishing, incl writing, editorial services, design	26	11
Art media, incl writing, editorial services, design	37	15
TOTAL	1006	

Activity N	Black	White	Black %	White %
Education and training services	53	79	52	56
Research	35	68	34	49
Support services to artists	27	34	26	24
Art materials supplier	5	5	5	4
Materials manufacture	8	3	8	2
Materials retail	6	5	6	4
Producing artwork	94	130	92	93
Production/project management, incl commissioning services	23	23	23	16
Managing/promoting artists	16	15	16	11
Curating exhibitions/projects	19	35	19	25
Designing/installing artworks/exhibitions	20	47	20	34
Selling artwork	51	67	50	48
Framing services	9	5	9	4
Conservation/restoration services	2	11	2	8
Marketing and publicity services	13	15	13	11
Art publishing, incl writing, editorial services, design	3	22	3	16
Art media, incl writing, editorial services, design	12	24	12	17

1.9 Working with Others

Which of the following statements most accurately characterises your working process? (single response)

	N	%
I mainly work by myself	146	60
I sometimes work in creative collaboration with others	34	14
I mainly work in creative collaboration with others	14	6

I do both more or less equally	50	20
TOTAL	244	100

N	I mainly work by myself	I sometimes work in creative collaboration with others	I mainly work in creative collaboration with others	I do both more or less equally	TOTAL
Gauteng	37	7	5	16	65
Western Cape	37	2	4	15	58
Kwazulu Natal	29	12	2	4	47
Free State & EC	21	5	1	7	34
Other provinces	22	8	2	8	40
TOTAL	146	34	14	50	244

%	I mainly work by myself	I sometimes work in creative collaboration with others	I mainly work in creative collaboration with others	I do both more or less equally
Gauteng	57	11	8	25
Western Cape	64	3	7	26
Kwazulu Natal	62	26	4	9
Free State & EC	62	15	3	21
Other provinces	55	20	5	20
TOTAL	60	14	6	20

Age N	20-25	26-35	36-45	46-55	56-70	> 70	Total
I mainly work by myse	9	48	36	18	28	5	144
I sometimes work in c	7	12	6	7	2	0	34
I mainly work in crea	1	6	5	1	1	0	14
I do both more or les	2	23	10	15	0	0	50
Total	19	89	57	41	31	5	242

Age %	20-25	26-35	36-45	46-55	56-70	> 70	Total
I mainly work by myse	47	54	63	44	90	100	60
I sometimes work in c	37	13	11	17	6	0	14
I mainly work in crea	5	7	9	2	3	0	6
I do both more or les	11	26	18	37	0	0	21
Total	100	100	100	100	100	100	100

1.10 Market Segment

What area/s of visual arts practice are you involved in? (multiple response)

Practise	N	%
Contemporary, etc..	134	55
Traditional artworks	113	46
Public art	43	18
Community arts	31	13
Craft art/fine craft	87	36
Other	11	4
TOTAL	419	

Practise	Black	White	Black %	White %
Contemporary, etc..	48	83	47	59
Traditional artworks	47	66	46	47
Public art	19	24	19	17
Community arts	16	13	16	9
Craft art/fine craft	44	41	43	29
Other	2	9	2	6

Practise	M	F	M %	F %
Contemporary, etc..	59	75	48	61
Traditional artworks	63	50	52	41
Public art	22	21	18	17
Community arts	16	15	13	12
Craft art/fine craft	44	43	36	35
Other	6	5	5	4

N	Black Male	Black Female	White Male	White Female
Contemporary, etc..	28	20	30	53
Traditional artworks	38	9	25	41
Public art	15	4	7	17
Community arts	13	3	3	10
Craft art/fine craft	32	12	12	29
Other	2	0	4	5

%	Black Male	Black Female	White Male	White Female
Contemporary, etc..	39	67	61	58
Traditional artworks	53	30	51	45
Public art	21	13	14	19
Community arts	18	10	6	11
Craft art/fine craft	44	40	24	32
Other	3	0	8	5

N (Professionals only)	Contemporary, etc.	Traditional artworks	Public art	Community arts	Craft art/fine craft	Other
Gauteng	50	31	16	12	11	1
Western Cape	32	21	9	8	20	6
Kwazulu Natal	17	32	12	5	28	3
Free State & EC	21	14	5	4	10	1
Other provinces	14	15	1	2	18	0
TOTAL	134	113	43	31	87	0

% (Professionals only)	Contemporary, etc.	Traditional artworks	Public art	Community arts	Craft art/fine craft	Other
Gauteng	76	47	24	18	17	2
Western Cape	55	36	16	14	34	10
Kwazulu Natal	36	68	26	11	60	6
Free State & EC	62	41	15	12	29	3
Other provinces	35	38	3	5	45	0

Photography was mentioned 4 times as Other

1.11 Disciplinary Spread

Which specific art making process do you MOSTLY employ? (single response)

Process 1	N	%
Painting and Drawing	115	47
Sculpting	29	12
Photography	18	7
Print making	12	5
Performance/Live art	3	1
Video art	5	2
Installation art	11	5
New Media/Digital Arts	9	4
Illustration	6	2
Graphic Art	4	2
Cartooning	2	1
Other	29	12
TOTAL	243	100

Process 1 N	Black Male	Black Female	White Male	White Female
Painting and Drawing	41	11	20	42
Sculpting	10	3	6	9
Photography	3	4	6	5
Print making	9	0	1	2
Performance/Live art	1	1	0	1
Video art	0	1	1	3
Installation art	0	3	2	6
New Media/Digital Arts	1	0	1	7
Illustration	2	0	0	4
Graphic Art	2	0	2	0
Cartooning	0	1	0	1
Other	3	6	9	10
Total	72	30	48	90

Process 1 %	Black Male	Black Female	White Male	White Female
Painting and Drawing	57	37	42	47
Sculpting	14	10	13	10
Photography	4	13	13	6
Print making	13	0	2	2
Performance/Live art	1	3	0	1
Video art	0	3	2	3
Installation art	0	10	4	7
New Media/Digital Arts	1	0	2	8
Illustration	3	0	0	4
Graphic Art	3	0	4	0
Cartooning	0	3	0	1
Other	4	20	19	11

Others include: Ceramics (12), Ostrich eggs beadwork (5), Jewelry (2), Multimedia (2), Pottery, Book art, glass art, handmade paper art and Drawing

Which other specific art making processes do you ALSO employ in your practice? (multiple response)

Process 2	N	%
Painting and Drawing	88	36
Sculpting	76	31
Photography	73	30
Print making	72	29
Performance/Live art	25	10
Video art	31	13
Installation art	42	17
New Media/Digital Arts	42	17
Illustration	38	16
Graphic Art	31	13
Cartooning	14	6
Other	14	6
TOTAL	546	

Gauteng (Prof)	N	%
Painting and Drawing	28	42
Sculpting	17	26
Photography	12	18
Performance/Live art	8	12
Video art	14	21
Installation art	8	12
New Media/Digital Arts	6	9
Graphic Art	2	3
Other	4	6
TOTAL	99	

Other include: Multimedia (2), murals, Crafting, Ceramics (3), found objects and waste material, rapid prototyping processes and stained glass.

1.12 Work Premises

What kind of premises do you mainly conduct your work as a visual artist from? (choose ONE)

	N	%
Home workshop, studio or office (rented)	58	24
Home workshop, studio or office (owned)	116	48
Studio away from home (rented)	28	12
Studio away from home (owned)	9	4
Currently have no work premises	16	7
Other (specify)	15	6
TOTAL	242	100

	Black	White	Black %	White %
Home workshop, studio or office (rented)	26	32	26	23

Home workshop, studio or office (owned)	37	77	37	56
Studio away from home (rented)	17	11	17	8
Studio away from home (owned)	4	5	4	4
Currently have no work premises	11	5	11	4
Other (specify)	6	8	6	6
TOTAL	101	138	100	100

	M	F	M %	F %
Home workshop, studio or office (rented)	31	27	26	22
Home workshop, studio or office (owned)	55	61	45	50
Studio away from home (rented)	17	11	14	9
Studio away from home (owned)	6	3	5	2
Currently have no work premises	9	7	7	6
Other (specify)	3	12	2	10
TOTAL	121	121	100	100

N	Home (rented)	Home (owned)	Studio (rented)	Studio (owned)	No premises	Other	TOTAL
Gauteng	17	25	8	0	8	7	65
Western Cape	14	26	8	4	1	3	56
Kwazulu Natal	11	21	8	1	3	3	47
Free State & EC	7	15	4	3	3	2	34
Other provinces	9	29	0	1	1	0	40
TOTAL	58	116	28	9	16	15	242

%	Home (rented)	Home (owned)	Studio (rented)	Studio (owned)	No premises	Other
Gauteng	26	38	12	0	12	11
Western Cape	25	46	14	7	2	5
Kwazulu Natal	23	45	17	2	6	6
Free State & EC	21	44	12	9	9	6
Other provinces	23	73	0	3	3	0
TOTAL	24	48	12	4	7	6

Other include Art School (2) and University

1.13 Legal Status

How would you describe the business structure that you conduct your work as an artist through? (choose ONE)

	N	%
Self-employed, no formal legal status	136	56
Self-employed-Sole Trader	59	24
Co-operative	4	2
Partnership	4	2
Closed Corporation	18	7
PTY/ltd	2	1
Section 21 company	6	2

Other	16	7
TOTAL	245	100

N (professionals Only)	Self-employed, no formal	Self-employed-Sole Trader	Co-operative	Partnership	CC	PTY	Section 21	Other	TOTAL
Gauteng	34	15	0	0	6	1	4	6	66
Western Cape	26	24	1	1	3	1	0	2	58
Kwazulu Natal	26	9	1	2	2	0	1	6	47
Free State & EC	19	7	2	1	4	0	0	1	34
Other provinces	31	4	0	0	3	0	1	1	40
TOTAL	136	59	4	4	16	2	6	16	245

% (professionals Only)	Self-employed, no formal	Self-employed-Sole Trader	Co-operative	Partnership	CC	PTY	Section 21	Other
Gauteng	52	23	0	0	9	2	6	9
Western Cape	45	41	2	2	5	2	0	3
Kwazulu Natal	55	19	2	4	4	0	2	13
Free State & EC	56	21	6	3	12	0	0	3
Other provinces	78	10	0	0	8	0	3	3
TOTAL	56	24	2	2	7	1	2	7

Other include: Tertiary institution (12), Government, Gallery, NPO (2)

1.14 Lifespan of Practice in this Capacity

How long have you worked in this way?

	N	%
0 to 5 year	94	39
6 to 10 year	59	24
11 to 20 year	56	23
> 20 years	35	14
TOTAL	244	100

N (professionals Only)	0 to 5 year	6 to 10 year	11 to 20 year	> 20 year	TOTAL
Gauteng	32	16	10	8	66
Western Cape	18	16	12	12	58
Kwazulu Natal	17	10	11	9	47
Free State & EC	15	7	9	3	34
Other provinces	12	10	14	3	39
TOTAL	94	59	56	35	244

% (professionals Only)	0 to 5 year	6 to 10 year	11 to 20 year	> 20 year
Gauteng	48	24	15	12
Western Cape	31	28	21	21
Kwazulu Natal	36	21	23	19
Free State & EC	44	21	26	9
Other provinces	31	26	36	8
TOTAL	39	24	23	14

1.15 Span of Practice as Visual Artist

How long have you been working as a visual artist for?

	N	%
0 to 5 year	56	23
6 to 10 year	57	24
11 to 20 year	67	28
> 20 years	61	25
TOTAL	241	100

	Black	White	Black %	White %
0 to 5 year	23	33	23	24
6 to 10 year	27	30	27	22
11 to 20 year	32	33	32	24
> 20 years	16	44	16	32
TOTAL	98	140	100	100

	M	F	M %	F %
0 to 5 year	21	35	21	25
6 to 10 year	30	27	30	20
11 to 20 year	37	30	37	22
> 20 years	34	27	34	20
TOTAL	122	119	100	100

N (professionals Only)	0 to 5 year	6 to 10 year	11 to 20 year	> 20 year	TOTAL
Gauteng	24	17	13	12	66
Western Cape	10	13	18	17	58
Kwazulu Natal	6	13	10	18	47
Free State & EC	7	9	10	8	34
Other provinces	9	5	16	6	36
TOTAL	56	57	67	61	241

% (professionals Only)	0 to 5 year	6 to 10 year	11 to 20 year	> 20 year
Gauteng	36	26	20	18
Western Cape	17	22	31	29
Kwazulu Natal	13	28	21	38
Free State & EC	21	26	29	24

Other provinces	25	14	44	17
TOTAL	23	24	28	25

2. Career Development

2.1 Highest Level of Educational Qualification

What is your highest level of educational qualification?

	N	%
no formal education	5	2
Up to grade 9	4	2
Completed grade 9	12	5
Up to grade 12 or FET/technical college equivalent	14	6
Completed grade 12 or FET technical college equivalent	26	11
Learnership or skills programme	8	3
Undergraduate degree/diploma	83	34
Postgraduate degree/diploma	93	38
TOTAL	245	100

	Black	White	Black %	White %
no formal education	5	0	5	0
Up to grade 9	2	2	2	1
Completed grade 9	10	2	10	1
Up to grade 12 or FET/technical college equivalent	11	3	11	2
Completed grade 12 or FET technical college equivalent	15	11	15	8
Learnership or skills programme	5	3	5	2
Undergraduate degree/diploma	32	49	31	35
Postgraduate degree/diploma	22	70	22	50
TOTAL	102	140	100	100

	M	F	M %	F %
no formal education	0	5	0	4
Up to grade 9	3	1	2	1
Completed grade 9	10	2	8	2
Up to grade 12 or FET/technical college equivalent	14	0	11	0
Completed grade 12 or FET technical college equivalent	16	10	13	8
Learnership or skills programme	6	2	5	2
Undergraduate degree/diploma	40	43	33	35
Postgraduate degree/diploma	33	60	27	49
TOTAL	122	123	100	100

N	Black Male	Black Female	White Male	White Female
no formal education	0	5	0	0
Up to grade 9	2	0	1	1
Completed grade 9	9	1	1	1
Up to grade 12 or FET/technical college equivalent	11	0	3	0
Completed grade 12 or FET technical college equivalent	11	4	5	6

Learnership or skills programme	4	1	2	1
Undergraduate degree/diploma	20	12	19	30
Postgraduate degree/diploma	15	7	18	52
TOTAL	72	30	49	91

%	Black Male	Black Female	White Male	White Female
no formal education	0	17	0	0
Up to grade 9	3	0	2	1
Completed grade 9	13	3	2	1
Up to grade 12 or FET/technical college equivalent	15	0	6	0
Completed grade 12 or FET technical college equivalent	15	13	10	7
Learnership or skills programme	6	3	4	1
Undergraduate degree/diploma	28	40	39	33
Postgraduate degree/diploma	21	23	37	57

N (professionals Only)	Up to grade 9	No formal education	Completed grade 9	Up to grade 12 or FET/technical college equivalent	Completed grade 12 or FET technical college equivalent	Learnership or skills programme	Undergraduate degree/diploma	Postgraduate degree/diploma	TOTAL
Gauteng	0	1	2	2	6	2	24	29	66
Western Cape	0	0	1	1	8	3	24	21	58
Kwazulu Natal	0	1	1	7	6	1	15	16	47
Free State & EC	0	1	3	2	0	1	12	15	34
Other provinces	5	1	5	2	6	1	8	12	40
TOTAL	5	4	12	14	26	8	83	93	245

% (professionals Only)	Up to grade 9	No formal education	Completed grade 9	Up to grade 12 or FET/technical college equivalent	Completed grade 12 or FET technical college equivalent	Learnership or skills programme	Undergraduate degree/diploma	Postgraduate degree/diploma
Gauteng	0	2	3	3	9	3	36	44
Western Cape	0	0	2	2	14	5	41	36
Kwazulu Natal	0	2	2	15	13	2	32	34
Free State & EC	0	3	9	6	0	3	35	44
Other provinces	13	3	13	5	15	3	20	30
TOTAL	2	2	5	6	11	3	34	38

2.2 Educational Experiences

Did you benefit from any of the following during the course of your development as a visual arts professional?

	N	%
Art in primary school	103	42
Art in secondary school (public)	97	40
Art in secondary school (private)	37	15
Arts Training in an FET/technical college	34	14
Visual Arts training through a private college	22	9
Arts Training through an NGO provider	25	10
Arts training through a SETA learnership or skills programme	12	5
Undergraduate visual arts degree	105	43
Postgraduate visual arts degree	73	30
Apprenticeship/mentorship	48	20
Private classes with a practicing professional	61	25
Workshops and short courses	113	46
Participated in a residency	40	16
Awarded a fellowship	14	6
No formal training in the arts/self taught	39	16
TOTAL	823	

2.3 Professional Achievements

Have you done any of the following in the last 5 years? (multiple response)

	N	%
Had a solo show at a major gallery (public or commercial)	59	24
Had a solo show at a smaller gallery (public or commercial)	85	35
Had a solo show at a gallery/institution outside of South Africa	27	11
Participated in a group show at a major gallery	130	53
Participated in a group show at a smaller gallery	165	67
Participated in an exhibition at a community arts centre, festival or similar	118	48
Participated in a group show at a gallery/institution outside of South Africa	80	33
Had a work commissioned or purchased by a public gallery, organisation or institution	89	36
Had a work commissioned or purchased by a private company or corporate collection	105	43
Had a work commissioned by a private individual	140	57
Had artwork reviewed in a book or published in a professional journal	90	37
Had a work or works selected for inclusion on an Internet site	103	42
Won an award or competition	67	27
Participated in a residency	43	18
Other: Please specify	13	5
TOTAL	1314	

	Black	White	Black %	White %
Had a solo show at a major gallery (public or commercial)	20	38	20	27
Had a solo show at a smaller gallery (public or commercial)	33	52	32	37
Had a solo show at a gallery/institution outside of South Africa	12	14	12	10
Participated in a group show at a major gallery	55	74	54	53
Participated in a group show at a smaller gallery	66	98	65	70

Participated in an exhibition at a community arts centre, festival or similar	53	63	52	45
Participated in a group show at a gallery/institution outside of South Africa	38	40	37	29
Had a work commissioned or purchased by a public gallery, organisation or institution	39	48	38	34
Had a work commissioned or purchased by a private company or corporate collection	43	60	42	43
Had a work commissioned by a private individual	50	88	49	63
Had artwork reviewed in a book or published in a professional journal	33	56	32	40
Had a work or works selected for inclusion on an Internet site	31	71	30	51
Won an award or competition	25	40	25	29
Participated in a residency	26	16	25	11
Other: Please specify	6	7	6	5
TOTAL	530	765		

	M	F	M %	F %
Had a solo show at a major gallery (public or commercial)	30	29	25	24
Had a solo show at a smaller gallery (public or commercial)	46	39	38	32
Had a solo show at a gallery/institution outside of South Africa	15	12	12	10
Participated in a group show at a major gallery	72	58	59	47
Participated in a group show at a smaller gallery	84	81	69	66
Participated in an exhibition at a community arts centre, festival or similar	59	59	48	48
Participated in a group show at a gallery/institution outside of South Africa	42	38	34	31
Had a work commissioned or purchased by a public gallery, organisation or institution	46	43	38	35
Had a work commissioned or purchased by a private company or corporate collection	59	46	48	37
Had a work commissioned by a private individual	70	70	57	57
Had artwork reviewed in a book or published in a professional journal	48	42	39	34
Had a work or works selected for inclusion on an Internet site	48	55	39	45
Won an award or competition	32	35	26	28
Participated in a residency	24	19	20	15
Other: Please specify	5	8	4	7
TOTAL	680	634		

N	GP	WC	KZN	FS/EC	Other
Had a solo show at a major gallery (public or commercial)	18	12	14	9	6
Had a solo show at a smaller gallery (public or commercial)	22	19	25	11	8
Had a solo show at a gallery/institution outside of South Africa	10	7	6	1	3
Participated in a group show at a major gallery	34	22	35	19	20
Participated in a group show at a smaller gallery	54	29	37	23	22
Participated in an exhibition at a community arts centre, festival or similar	29	23	25	17	24
Participated in a group show at a gallery/institution outside of South Africa	30	12	23	6	9
Had a work commissioned or purchased by a public gallery, organisation or institution	29	16	24	13	7
Had a work commissioned or purchased by a private company or corporate collection	30	19	30	15	11
Had a work commissioned by a private individual	39	35	33	13	20
Had artwork reviewed in a book or published in a professional journal	31	17	22	7	13

Had a work or works selected for inclusion on an Internet site	30	22	26	13	12
Won an award or competition	24	12	15	11	5
Participated in a residency	16	11	8	4	4
Other: Please specify	3	3	2	3	2
TOTAL	399	259	325	165	166

%	GP	WC	KZN	FS/EC	Other
Had a solo show at a major gallery (public or commercial)	27	21	30	26	15
Had a solo show at a smaller gallery (public or commercial)	33	33	53	32	20
Had a solo show at a gallery/institution outside of South Africa	15	12	13	3	8
Participated in a group show at a major gallery	52	38	74	56	50
Participated in a group show at a smaller gallery	82	50	79	68	55
Participated in an exhibition at a community arts centre, festival or similar	44	40	53	50	60
Participated in a group show at a gallery/institution outside of South Africa	45	21	49	18	23
Had a work commissioned or purchased by a public gallery, organisation or institution	44	28	51	38	18
Had a work commissioned or purchased by a private company or corporate collection	45	33	64	44	28
Had a work commissioned by a private individual	59	60	70	38	50
Had artwork reviewed in a book or published in a professional journal	47	29	47	21	33
Had a work or works selected for inclusion on an Internet site	45	38	55	38	30
Won an award or competition	36	21	32	32	13
Participated in a residency	24	19	17	12	10
Other: Please specify	5	5	4	9	5

Other include: Published books, written chapter in book, Produced artwork for published books and Auctions

2.4 Defining Moment as Professional Artist

What would you regard as the moment that defined your becoming a professional artist? (choose ONE)

	N	%
Being able to support myself financially through my	101	42
Staging a solo exhibition	40	17
Participating in a group exhibition	40	17
Winning a prize or competition	23	10
Being awarded a public or private commission	9	4
Receiving funding for a project/exhibition	8	3
I don't regard myself as a professional artist	20	8
TOTAL	241	100

	Black	White	Black %	White %
Being able to support myself financially through my work as a visual artist	51	49	50	36
Staging a solo exhibition	7	32	7	24
Participating in a group exhibition	19	21	19	15
Winning a prize or competition	12	11	12	8

Being awarded a public or private commission	1	7	1	5
Receiving funding for a project/exhibition	4	4	4	3
I don't regard myself as a professional artist	8	12	8	9
TOTAL	102	136	100	100

	M	F	M %	F %
Being able to support myself financially through my work as a visual artist	61	40	51	33
Staging a solo exhibition	12	28	10	23
Participating in a group exhibition	22	18	18	15
Winning a prize or competition	12	11	10	9
Being awarded a public or private commission	2	7	2	6
Receiving funding for a project/exhibition	5	3	4	2
I don't regard myself as a professional artist	6	14	5	12
TOTAL	120	121	100	100

2.5 Age at Which Defining Moment Took Place

How old were you when this happened? (ignore if not professional artist)

Professional age	
N	218
mean	28
p25	22
p50	26
min	5
max	68

Professional age	M	F
N	115	103
mean	26	31
p25	21	24
p50	25	28
min	8	5
max	68	66

Professional age	Black	White
N	92	123
mean	25	31
p25	21	24
p50	24	28
min	5	18
max	49	68

Professional age by Province	N	mean	p25	p50	min	max
Gauteng	61	29	24	27	18	66
Western Cape	50	31	24	28	5	68

Kwazulu Natal	45	29	24	26	19	65
Free State & EC	30	24	21	23	12	46
Other provinces	32	26	21	25	8	49

2.6 Primary Contributing Factors to Professional Development/Success

*What have been the primary contributing factors to your professional development or success to date?
Please rate them as follows: 1 = critical; 2 = important; 3 = useful; 4 = irrelevant*

AVG	TOTAL
My arts training	1.6
My talent	1.5
My determination and resourcefulness	1.3
My general education	2.1
Family networks	2.2
Art school networks	2.4
Participating in competitions	2.2
Peer/Professional networks	2.1
Assistance/support from a gallerist/dealer/patron	2.0
Support from a mentor	2.0
A lucky break	2.1
Financial assistance or funding	2.0
Recognition and encouragement from peers and friends	1.9
Other, specify: _____	

AVG	Black	White
My arts training	1.7	1.6
My talent	1.5	1.5
My determination and resourcefulness	1.4	1.3
My general education	2.2	2.1
Family networks	2.3	2.2
Art school networks	2.3	2.5
Participating in competitions	2.1	2.2
Peer/Professional networks	2.0	2.1
Assistance/support from a gallerist/dealer/patron	2.1	1.9
Support from a mentor	1.9	2.1
A lucky break	2.1	2.1
Financial assistance or funding	2.1	2.0
Recognition and encouragement from peers and friends	1.9	1.9
Other, specify: _____		

AVG	M	F
My arts training	1.6	1.6
My talent	1.4	1.6
My determination and resourcefulness	1.5	1.2
My general education	2.2	2.0
Family networks	2.2	2.3
Art school networks	2.3	2.4
Participating in competitions	2.1	2.2
Peer/Professional networks	2.0	2.1
Assistance/support from a gallerist/dealer/patron	2.1	1.9
Support from a mentor	2.1	2.0
A lucky break	2.1	2.1
Financial assistance or funding	2.2	1.9
Recognition and encouragement from peers and friends	1.9	1.9
Other, specify: _____		

Others include: (2) Access to the work of the Old Masters, (2) health of industry, (1) exposure through competition, (1) sales, (2) support family, (1) God, (1) age, (4) chronic illness and (3) communication.

3. Work Situation

3.1 Working Week by Hours

On average, how many hours would you say you work in a week, counting both arts-related and non-arts related work? (bear in mind that a standard 8 hour work shift, five days a week = 40 hours)

Hours a week	Professional
N	244
mean	44
p25	35
p50	45
min	0
max	119

Hours a week by Province	N	mean	p25	p50	min	max
Gauteng	65	45	40	45	0	90
Western Cape	58	42	35	40	3	90
Kwazulu Natal	47	47	40	50	0	70
Free State & EC	34	43	30	45	0	90
Other provinces	40	45	30	44	8	119
TOTAL	65	45	40	45	0	90

3.2 Length of Working Week

Generally, how long is your working week (including ALL of your work activities)

	N	%
Less than 5 day working week	21	9
5 day working week	70	29
6 day working week	97	40
7 day working week	55	23
TOTAL	243	100

N (professionals Only)	Less than 5 day working week	5 day working week	6 day working week	7 day working week	TOTAL
Gauteng	6	16	29	14	65
Western Cape	6	21	19	12	58
Kwazulu Natal	1	14	18	14	47
Free State & EC	7	7	14	6	34
Other provinces	1	12	17	9	40
TOTAL	21	70	97	55	243

% (professionals Only)	Less than 5 day working week	5 day working week	6 day working week	7 day working week
Gauteng	9	25	45	22
Western Cape	10	36	33	21
Kwazulu Natal	2	30	38	30
Free State & EC	21	21	41	18
Other provinces	3	30	43	23
TOTAL	9	29	40	23

3.3 Division of Work Time

What percentage of your working time do you spend on each of the following activities generally?

AVG percentages	
Producing own artwork and directly related activities	45
Networking	7
Other art-related work	12
Art-related Teaching	11
Voluntary work	3
Studying	6
Non arts related work	16
TOTAL	100

AVG percentages	M	F
Producing own artwork and directly related activities	48	43

Networking	8	6
Other art-related work	11	13
Art-related Teaching	11	12
Voluntary work	3	2
Studying	6	7
Non arts related work	14	18
TOTAL	100	100

AVG percentages	Black	White
Producing own artwork and directly related activities	44	46
Networking	9	5
Other art-related work	12	11
Art-related Teaching	9	13
Voluntary work	4	2
Studying	9	5
Non arts related work	14	18
TOTAL	100	100

Hours a week per activity USING 44 Hours avg	
Producing own artwork and directly related activities	20
Networking	3
Other art-related work	5
Art-related Teaching	5
Voluntary work	1
Studying	3
Non arts related work	7
TOTAL	44

% of time producing own artwork and related activities	N	%
0-25% of time	60	24
25-70% of time	139	57
70-100% of time	46	19
	245	100

N	Black Male	Black Female	White Male	White Female	ALL
0-25% of time	9	14	11	24	58
25-70% of time	52	11	28	47	138
70-100% of time	11	5	10	20	46

	72	30	49	91	242

%	Black Male	Black Female	White Male	White Female	ALL
0-25% of time	13	47	22	26	24
25-70% of time	72	37	57	52	57
70-100% of time	15	17	20	22	19
	100	100	100	100	100

3.4 Reasons for Not Being able to Devote More Time to Producing Artwork

If you spend less than 50% of your time 'producing own artwork', which of the following most closely describes the reasons for not devoting more time to this activity (you can choose more than one)

	N	%
Happy	38	16
Supplementary income	88	36
Domestic/family responsibilities	56	23
Community responsibilities	18	7
Other	16	7
TOTAL	216	

	Black	White	Black %	White %
Happy	19	19	19	14
Supplementary income	41	45	40	32
Domestic/family responsibilities	25	30	25	21
Community responsibilities	10	7	10	5
Other	2	14	2	10
TOTAL	97	115		

%	M	F	M %	F %
Happy	25	13	20	11
Supplementary income	42	46	34	37
Domestic/family responsibilities	23	33	19	27
Community responsibilities	9	9	7	7
Other	6	10	5	8
TOTAL	105	111		

N (professionals Only)	Happy	Supplementary income	Domestic/family responsibilities	Community responsibilities	Other
Gauteng	12	29	17	6	5
Western Cape	6	18	13	2	3
Kwazulu Natal	6	19	8	3	2
Free State & EC	8	15	8	6	2
Other provinces	6	7	10	1	4
TOTAL	38	88	56	18	16

% (professionals Only)	Happy	Supplementary income	Domestic/family responsibilities	Community responsibilities	Other
Gauteng	18	44	26	9	8
Western Cape	10	31	22	3	5
Kwazulu Natal	13	40	17	6	4
Free State & EC	24	44	24	18	6
Other provinces	15	18	25	3	10

Others include: Not financially viable, Leave, Hobbies, Student (2), Chronic disease, Own business, other interests, teaching (2)

3.5 Need to Spend Time on Work Outside of the Visual Arts

Do you have to spend time engaged in work/business outside of the visual arts to sustain your work as a visual artist?

	N	%
No	117	48
Yes	128	52
TOTAL	245	100

	Black	White	Black %	White %
No	46	69	45	49
Yes	56	71	55	51
TOTAL	102	140	100	100

	M	F	M %	F %
No	52	65	43	53
Yes	70	58	57	47
TOTAL	122	123	100	100

N	Black Male	Black Female	White Male	White Female
No	32	14	19	50
Yes	40	16	30	41
TOTAL	72	30	49	91

%	Black Male	Black Female	White Male	White Female
No	28	12	17	43
Yes	31	13	24	32

N (professionals Only)	No	Yes	TOTAL
Gauteng	31	35	66
Western Cape	30	28	58
Kwazulu Natal	21	26	47
Free State & EC	20	14	34
Other provinces	15	25	40
TOTAL	117	128	245

(% (professionals Only)	No	Yes
Gauteng	47	53
Western Cape	52	48
Kwazulu Natal	45	55
Free State & EC	59	41
Other provinces	38	63
TOTAL	48	52

3.6 Reasons for Undertaking Work Outside of the Visual Arts

If YES, why are you involved in other activities to support your "creative" activity (choose one or more)?

	N	%
Subsidise	89	36
Market is too small	53	22
Risk reduction	29	12
Expansion	36	15
Other	8	3
TOTAL	215	

N (professionals Only)	Subsidise	Market is too small	Risk reduction	Expansion	Other
Gauteng	26	14	9	15	1
Western Cape	20	8	5	5	4
Kwazulu Natal	21	11	7	9	1
Free State & EC	9	7	3	4	1
Other provinces	13	13	5	3	1
TOTAL	89	53	29	36	8

(% (professionals Only)	Subsidise	Market is too small	Risk reduction	Expansion	Other
Gauteng	39	21	14	23	2
Western Cape	34	14	9	9	7
Kwazulu Natal	45	23	15	19	2
Free State & EC	26	21	9	12	3
Other provinces	33	33	13	8	3

3.7 Nature of Live/Work Location

How would you describe where you live and work? (choose ONE)

	N	%
Urban – Major City - Suburban/CBD	141	58
Urban – Major City - Township	39	16
Urban - town	34	14
Semi rural, small town	26	11
Deep rural/remote	4	2
TOTAL	244	100

	Black	White	Black %	White %
Urban – Major City - Suburban/CBD	41	97	40	69
Urban – Major Ciy - Township	36	3	35	2
Urban - town	7	27	7	19
Semi rural, small town	16	10	16	7
Deep rural/remote	2	2	2	1
TOTAL	102	140	100	100

	M	F	M %	F %
Urban – Major City - Suburban/CBD	61	80	50	65
Urban – Major Ciy - Township	32	7	26	6
Urban - town	12	22	10	18
Semi rural, small town	15	11	12	9
Deep rural/remote	2	2	2	2
TOTAL	122	123	100	100

N (professionals Only)	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remote	TOTAL
Gauteng	44	12	6	3	1	66
Western Cape	40	5	9	4	0	58
Kwazulu Natal	31	11	4	1	0	47
Free State & EC	16	4	7	6	1	34
Other provinces	10	7	8	12	2	40
TOTAL	141	39	34	26	4	244

% (professionals Only)	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remote
Gauteng	67	18	9	5	2
Western Cape	69	9	16	7	0
Kwazulu Natal	66	23	9	2	0
Free State & EC	47	12	21	18	3
Other provinces	25	18	20	30	5
TOTAL	58	16	14	11	2

3.8 Impact of Location on Market Access

How does your current location impact on your market access/ability to sell your work?

	N	%
Positively	128	53
Negatively	59	24
Does not affect it at all	56	23
TOTAL	243	100

	Black	White	Black %	White %
Positively	50	76	50	55

Negatively	28	31	28	22
Does not affect it at all	23	32	23	23
TOTAL	101	139	100	100

	M	F	M %	F %
Positively	58	70	48	57
Negatively	34	25	28	20
Does not affect it at all	29	27	24	22
TOTAL	121	122	100	100

N	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remote	TOTAL
Positively	91	18	9	9	0	128
Negatively	16	12	18	12	1	59
Does not affect	33	8	7	5	3	56
TOTAL	140	38	34	26	4	243

%	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remote	TOTAL
Positively	65	47	26	35	0	53
Negatively	11	32	53	46	25	24
Does not affect	24	21	21	19	75	23
TOTAL	100	100	100	100	100	100

N (professionals Only)	Positively	Negatively	Does not affect it at all	TOTAL
Gauteng	38	9	19	66
Western Cape	37	7	13	57
Kwazulu Natal	28	8	11	47
Free State & EC	10	16	7	33
Other provinces	15	19	6	40
TOTAL	128	59	56	243

% (professionals Only)	Positively	Negatively	Does not affect it at all
Gauteng	58	14	29
Western Cape	65	12	23
Kwazulu Natal	60	17	23
Free State & EC	30	48	21
Other provinces	38	48	15
TOTAL	53	24	23

3.9 Movement between Provinces

Please state which province/country you are originally from, and which province you currently live and work in?

N	Originally from:										
Currently	Gaute ng	WC	KZN	FS	EC	NW	LIM	Mpu m	NC	Oth Count	TOTAL

										ry	
Gauteng	37	5	4	2	2	1	4	2	2	7	66
WC	18	27	2	3	4	0	0	0	1	3	58
KZN	6	4	31	0	1	0	0	0	0	5	47
Free State	4	0	1	10	2	0	0	0	0	1	18
EC	5	0	0	0	10	0	0	0	0	1	16
North West	1	1	0	1	0	3	0	0	0	0	6
Limpopo	1	0	0	1	0	0	6	0	0	1	9
Mpumalanga	3	0	1	0	0	1	0	7	1	0	13
NC	2	1	1	0	0	0	0	0	3	5	12
TOTAL	77	38	40	17	19	5	10	9	7	23	245

%	Originally from:									
Currently	Gauteng	WC	KZN	FS	EC	NW	LIM	Mpum	NC	Oth Country
Gauteng	56.1	7.6	6.1	3.0	3.0	1.5	6.1	3.0	3.0	10.6
WC	31.0	46.6	3.4	5.2	6.9	0.0	0.0	0.0	1.7	5.2
KZN	12.8	8.5	66.0	0.0	2.1	0.0	0.0	0.0	0.0	10.6
Free State	22.2	0.0	5.6	55.6	11.1	0.0	0.0	0.0	0.0	5.6
EC	31.3	0.0	0.0	0.0	62.5	0.0	0.0	0.0	0.0	6.3
North West	16.7	16.7	0.0	16.7	0.0	50.0	0.0	0.0	0.0	0.0
Limpopo	11.1	0.0	0.0	11.1	0.0	0.0	66.7	0.0	0.0	11.1
Mpumalanga	23.1	0.0	7.7	0.0	0.0	7.7	0.0	53.8	7.7	0.0
NC	16.7	8.3	8.3	0.0	0.0	0.0	0.0	0.0	25.0	41.7
TOTAL	100	100	100	100	100	100	100	100	100	100

N	Originally from:									
Currently	Gauteng	WC	KZN	FS	NW	LIM	Mpum	EC	NC	Oth Country
Gauteng	37	5	4	2	1	4	2	2	2	7
WC	18	27	2	3	0	0	0	4	1	3
KZN	6	4	31	0	0	0	0	1	0	5
Free State	4	0	1	10	0	0	0	2	0	1
North West	1	1	0	1	3	0	0	0	0	0
Limpopo	1	0	0	1	0	6	0	0	0	1
Mpumalanga	3	0	1	0	1	0	7	0	1	0
EC	5	0	0	0	0	0	0	10	0	1
NC	2	1	1	0	0	0	0	0	3	5
TOTAL	77	38	40	17	5	10	9	19	7	23

%	Originally from:									
Currently	Gauteng	WC	KZN	FS	NW	LIM	Mpum	EC	NC	Oth Country
Gauteng	48	13	10	12	20	40	22	11	29	30
WC	23	71	5	18	0	0	0	21	14	13
KZN	8	11	78	0	0	0	0	5	0	22

Free State	5	0	3	59	0	0	0	11	0	4
North West	1	3	0	6	60	0	0	0	0	0
Limpopo	1	0	0	6	0	60	0	0	0	4
Mpumalanga	4	0	3	0	20	0	78	0	14	0
EC	6	0	0	0	0	0	0	53	0	4
NC	3	3	3	0	0	0	0	0	43	22
TOTAL	100	100	100	100	100	100	100	100	100	100

Currently living and working in...

	N	%
Gauteng	66	27
WC	58	24
KZN	47	19
Free State	18	7
North West	6	2
Limpopo	9	4
Mpumalanga	13	5
EC	16	7
NC	12	5
TOTAL	245	100

Originally from....

	N	%
Gauteng	77	31
Western Cape	38	16
Kwazulu Natal	40	16
Free State	17	7
North West	5	2
Limpopo	10	4
Mpumalanga	9	4
Eastern Cape	19	8
Northern Cape	7	3
Other country	23	9
TOTAL	245	100

3.10 Most Significant Context for Sale of Work

What is the MOST important context for selling your work? (choose ONE)

	N	%
From my home/studio	50	20
At markets/festivals	13	5
Through local galleries	115	47
Through international galleries	5	2
Through commissions	42	17
Via a website	9	4
Other, specify	10	4

TOTAL	244	100

	Black	White	Black %	White %
From my home/studio	24	25	24	18
At markets/festivals	10	3	10	2
Through local galleries	48	66	47	47
Through international galleries	2	3	2	2
Through commissions	12	29	12	21
Via a website	2	7	2	5
Other, specify	4	6	4	4
TOTAL	102	139	100	100

N	GP	WC	KZN	FS/EC	Other	TOTAL
From my home/studio	13	10	7	9	11	50
At markets/festivals	2	1	0	5	5	13
Through local galleries	33	24	27	16	15	115
Through international galleries	0	1	1	1	2	5
Through commissions	14	14	7	2	5	42
Via a website	4	4	1	0	0	9
Other, specify	0	3	4	1	2	10
TOTAL	66	57	47	34	40	244

%	GP	WC	KZN	FS/EC	Other	TOTAL
From my home/studio	20	18	15	26	28	20
At markets/festivals	3	2	0	15	13	5
Through local galleries	50	42	57	47	38	47
Through international galleries	0	2	2	3	5	2
Through commissions	21	25	15	6	13	17
Via a website	6	7	2	0	0	4
Other, specify	0	5	9	3	5	4
TOTAL	100	100	100	100	100	100

Others include do not sell, Networks (2) and not for sale

What is the SECOND MOST important context for selling your work?

	N	%
From my home/studio	72	31
At markets/festivals	29	13
Through local galleries	41	18
Through international galleries	15	7
Through commissions	37	16
Via a website	24	10
Other, specify	13	6
TOTAL	231	100

Others include funded projects and word of mouth.

3.11 Most Financially Significant Market (geographical reach)

At the moment, the MOST financially significant market for your work is...

	N	%
Local?	103	43
Regional?	54	23
National?	53	22
Continental/African?	3	1
International?	27	11
TOTAL	240	100

	Black	White	Black %	White %
Local?	45	56	45	41
Regional?	20	34	20	25
National?	17	35	17	25
Continental/African?	3	0	3	0
International?	14	13	14	9
TOTAL	99	138	100	100

N (professionals Only)	Local?	Regional?	National?	Continental/African?	International?	TOTAL
Gauteng	22	20	14	2	8	66
Western Cape	23	12	15	0	7	57
Kwazulu Natal	19	9	7	0	9	44
Free State & EC	20	3	10	0	1	34
Other provinces	19	10	7	1	2	39
TOTAL	103	54	53	3	27	240

% (professionals Only)	Local?	Regional?	National?	Continental/African?	International?
Gauteng	52	23	0	33	30
Western Cape	46	42	2	40	21
Kwazulu Natal	59	20	2	43	20
Free State & EC	56	21	6	59	9
Other provinces	79	10	0	49	26
TOTAL	57	25	2	43	23

At the moment, the SECOND MOST financially significant market for your work is...

	N	%
Local?	51	22
Regional?	64	28
National?	76	33
Continental/African?	3	1
International?	33	15
TOTAL	227	100

N (professionals Only)	Local?	Regional?	National?	Continental/African?	International?	TOTAL

Gauteng	16	12	22	2	9	61
Western Cape	8	15	20	0	11	54
Kwazulu Natal	7	12	19	0	6	44
Free State & EC	11	11	7	1	4	34
Other provinces	9	14	8	0	3	34
TOTAL	51	64	76	3	33	227

% (professionals Only)	Local?	Regional?	National?	Continental/ African?	International?
Gauteng	26	20	36	3	15
Western Cape	15	28	37	0	20
Kwazulu Natal	16	27	43	0	14
Free State & EC	32	32	21	3	12
Other provinces	26	41	24	0	9
TOTAL	22	28	33	1	15

3.12 Extent to Which Tourists Are Perceived as Significant Target Market

Do tourists form a significant part of your target market/buyers of your work?

	N	%
No	168	69
Yes	77	31
TOTAL	245	100

	Black	White	Black %	White %
No	59	106	58	76
Yes	43	34	42	24
TOTAL	102	140	100	100

N (professionals Only)	No	Yes	No %	Yes %
Gauteng	50	16	76	24
Western Cape	39	19	67	33
Kwazulu Natal	31	16	66	34
Free State & EC	23	11	68	32
Other provinces	25	15	63	38
TOTAL	168	77	69	31

3.13 Perception of Market for Own Work

How would you characterise the market for your work? (choose ONE)

	N	%
Healthy, growing	49	20
Gradual improvement	97	40
Stagnant	64	26
In decline	24	10
In sharp decline	8	3
TOTAL	242	100

	Black	White	Black %	White %
Healthy, growing	20	29	20	21
Gradual improvement	37	58	36	42
Stagnant	27	36	26	26
In decline	12	12	12	9
In sharp decline	6	2	6	1
TOTAL	102	137	100	100

	M	F	M %	F %
Healthy, growing	23	26	19	21
Gradual improvement	47	50	39	41
Stagnant	36	28	30	23
In decline	14	10	12	8
In sharp decline	1	7	1	6
TOTAL	121	121	100	100

N (professionals Only)	Healthy, growing	Gradual improvement	Stagnant	In decline	In sharp decline	TOTAL
Gauteng	14	30	17	4	1	66
Western Cape	8	25	17	5	2	57
Kwazulu Natal	15	17	9	5	1	47
Free State & EC	6	13	7	7	0	33
Other provinces	6	12	14	3	4	39
TOTAL	49	97	64	24	8	242

% (professionals Only)	Healthy, growing	Gradual improvement	Stagnant	In decline	In sharp decline
Gauteng	21	45	26	6	2
Western Cape	14	44	30	9	4
Kwazulu Natal	32	36	19	11	2
Free State & EC	18	39	21	21	0
Other provinces	15	31	36	8	10
TOTAL	20	40	26	10	3

3.14 Most Important Methods of Marketing Own Work

Please indicate which of the following methods of marketing/promoting your artwork (other than through exhibitions) is the MOST important (choose ONE)?

	N	%
Networks	123	52
On-line presence	28	12
Agent/gallerist	74	30
Brochures	7	3
Other	11	5
TOTAL	243	100

	Black	White	Black %	White %

Networks	48	74	47	54
On-line presence	12	16	12	12
Agent/gallerist	32	40	31	29
Brochures	6	1	6	1
Other	4	7	4	5
TOTAL	102	138	100	100

N (professionals Only)	Networks	On-line presence	Agent/gallerist	Brochures	Other	TOTAL
Gauteng	39	9	17	0	1	66
Western Cape	30	7	16	0	3	56
Kwazulu Natal	16	6	22	1	2	47
Free State & EC	22	1	5	2	4	34
Other provinces	16	5	14	4	1	40
TOTAL	123	28	74	7	11	243

% (professionals Only)	Networks	On-line presence	Agent/gallerist	Brochures	Other
Gauteng	59	14	26	0	2
Western Cape	54	13	29	0	5
Kwazulu Natal	34	13	47	2	4
Free State & EC	65	3	15	6	12
Other provinces	40	13	35	10	3
TOTAL	51	12	30	3	5

Other include word of mouth (2) and DTI

Please indicate which of the following methods of marketing/promoting your artwork (other than through exhibitions) is the SECOND MOST important (choose ONE)?

	N	%
Networks	73	31
On-line presence	68	29
Agent/gallerist	56	24
Brochures	17	7
Other	21	9
TOTAL	235	100

N (professionals Only)	Networks	On-line presence	Agent/gallerist	Brochures	Other	TOTAL
Gauteng	19	21	14	5	5	64
Western Cape	19	15	14	2	4	54
Kwazulu Natal	24	9	9	1	4	47
Free State & EC	2	12	12	2	5	33
Other provinces	9	11	7	7	3	37
TOTAL	73	68	56	17	21	235

% (professionals Only)	Networks	On-line presence	Agent/gallerist	Brochures	Other
Gauteng	30	33	22	8	8

Western Cape	35	28	26	4	7
Kwazulu Natal	51	19	19	2	9
Free State & EC	6	36	36	6	15
Other provinces	24	30	19	19	8
TOTAL	31	29	24	7	9

Other include word of mouth (3), international competition and residency, markets (2), Approaching clients, exhibitions, Art associations, commissions

3.15 Average Selling Price of Artwork

What is the average selling price of your artworks? (choose ONE)

	N	%
Less than R1000	34	14
R1000 - R5000	99	41
R5000 - R20000	89	37
R20 000 - R50 000	15	6
R50 000 - R100 000	4	2
TOTAL	241	100

	Black	White	Black %	White %
Less than R1000	20	14	20	10
R1000 - R5000	43	55	42	40
R5000 - R20000	31	57	30	42
R20 000 - R50 000	7	7	7	5
R50 000 - R100 000	1	3	1	2
TOTAL	102	136	100	100

N (professionals Only)	Less than R1000	R1000 - R5000	R5000 - R20000	R20 000 - R50 000	R50 000 - R100 000	TOTAL
Gauteng	6	30	25	4	1	66
Western Cape	5	25	22	2	1	55
Kwazulu Natal	2	15	23	5	1	46
Free State & EC	8	15	8	2	1	34
Other provinces	13	14	11	2	0	40
TOTAL	34	99	89	15	4	241

% (professionals Only)	Less than R1000	R1000 - R5000	R5000 - R20000	R20 000 - R50 000	R50 000 - R100 000
Gauteng	9	45	38	6	2
Western Cape	9	45	40	4	2
Kwazulu Natal	4	33	50	11	2
Free State & EC	24	44	24	6	3
Other provinces	33	35	28	5	0
TOTAL	14	41	37	6	2

3.16 Relationship to Gallery System

How would you characterise your relationship with the gallery system? (choose ONE)

	N	%
Agreement	8	3
One gallery	39	16
Variety of galleries	100	42
Little/no engagement	90	38
Other	3	1
TOTAL	240	100

	Black	White	Black %	White %
Agreement	3	5	3	4
One gallery	18	21	18	15
Variety of galleries	34	65	34	48
Little/no engagement	45	43	45	32
Other	1	2	1	1
TOTAL	101	136	100	100

N (professionals Only)	Agreement	One gallery	Variety of galleries	Little/no engagement	Other	TOTAL
Gauteng	2	11	26	27	0	66
Western Cape	1	5	25	23	1	55
Kwazulu Natal	3	6	25	10	1	45
Free State & EC	1	7	8	18	0	34
Other provinces	1	10	16	12	1	40
TOTAL	8	39	100	90	3	240

% (professionals Only)	Agreement	One gallery	Variety of galleries	Little/no engagement	Other
Gauteng	3	17	39	41	0
Western Cape	2	9	45	42	2
Kwazulu Natal	7	13	56	22	2
Free State & EC	3	21	24	53	0
Other provinces	3	25	40	30	3
TOTAL	3	16	42	38	1

3.17 Commission Charged by Gallerists/Agents

What commission and associated costs are you generally charged on the sale of your work by galleries, dealers and other intermediaries? (choose ONE)

	N	%
No commission	29	13
0-10%	6	3
10-20%	18	8
20-30%	30	13
30-40%	94	41
40-50%	32	14
50-60%	10	4
60-70%	3	1

More than 70%	7	3
TOTAL	229	100

N (professionals Only)	None	0-10%	10-20%	20-30%	30-40%	40-50%	50-60%	60-70%	> 70%	TOTAL
Gauteng	8	1	2	8	31	10	4	0	1	65
Western Cape	11	1	2	5	21	5	3	2	3	53
Kwazulu Natal	4	0	0	5	20	10	2	1	1	43
Free State & EC	6	0	5	9	9	4	0	0	0	33
Other provinces	0	4	9	3	13	3	1	0	2	35
TOTAL	29	6	18	30	94	32	10	3	7	229

% (professionals Only)	None	0-10%	10-20%	20-30%	30-40%	40-50%	50-60%	60-70%	> 70%
Gauteng	12	2	3	12	48	15	6	0	2
Western Cape	21	2	4	9	40	9	6	4	6
Kwazulu Natal	9	0	0	12	47	23	5	2	2
Free State & EC	18	0	15	27	27	12	0	0	0
Other provinces	0	11	26	9	37	9	3	0	6
TOTAL	13	3	8	13	41	14	4	1	3

3.18 Perception of Most Important Sector Development Initiatives

Which of the following initiatives do you think plays the MOST significant role in the development of the sector? (choose ONE)

	N	%
Local Biennale events	26	11
Johannesburg Art Fair	34	15
Local arts festivals	38	16
Local arts markets (eg art in the park)	18	8
Corporate art competitions and awards	45	19
Non-profit arts development organisations	16	7
Artist-run project/exhibition spaces	42	18
Residency and int. exchange programmes	14	6
TOTAL	234	100

	Black	White	Black %	White %
Local Biennale events	9	16	9	12
Johannesburg Art Fair	19	15	19	11
Local arts festivals	16	22	16	17
Local arts markets (eg art in the park)	13	5	13	4
Corporate art competitions and awards	8	36	8	27
Non-profit arts development organisations	9	7	9	5
Artist-run project/exhibition spaces	15	26	15	20
Residency and int. exchange programmes	10	4	10	3

TOTAL	99	132	100	100

N (professionals Only)	Local Biennale	Joburg Art Fair	Local arts festivals	Local arts mkts	Corporate art comp.	Non-profit arts dev. Org.	Artist-run proj/exh.	Residency and int. exh. Progr.	TOTAL
Gauteng	9	14	5	1	11	5	15	4	64
Western Cape	8	4	8	2	15	5	12	2	56
Kwazulu Natal	5	10	9	5	6	1	6	1	43
Free State & EC	3	0	9	2	5	2	6	4	31
Other provinces	1	6	7	8	8	3	3	3	40
TOTAL	26	34	38	18	45	16	42	14	234

% (professionals Only)	Local Biennale	Joburg Art Fair	Local arts festivals	Local arts mkts	Corporate art comp.	Non-profit arts dev. Org.	Artist-run proj/exh.	Residency and int. exh. Progr.
Gauteng	14	22	8	2	17	8	23	6
Western Cape	14	7	14	4	27	9	21	4
Kwazulu Natal	12	23	21	12	14	2	14	2
Free State & EC	10	0	29	6	16	6	19	13
Other provinces	3	15	18	20	20	8	8	8
TOTAL	11	15	16	8	19	7	18	6

3.19 Most Significant Obstacles to Career Development/Work

Which of the following issues represent significant obstacles to your career development/work? Rank them as follows: 1 = major; 2 = moderate; 3 = minor; 4 = not significant

The figures in **BOLD** are the average scores per category of obstacle

Professionals Only	AVG - Overall	AVG - Black	AVG - White
The high cost of....	2.20	2.17	2.21
materials and supplies	1.94	1.85	2.01
renting or acquiring space	2.10	2.01	2.01
utilities (electricity, etc)	2.40	2.33	2.47
communication (cell phone, landline, email etc)	2.32	2.13	2.50
technology	2.25	2.22	2.27
staging an exhibition	2.03	2.17	1.91
labour (assistants, staff, etc)	2.38	2.50	2.29
Market Conditions	2.14	2.16	2.12
shortage of exhibition/project opportunities - local	1.96	1.93	1.99
shortage of exhibition/project opportunities - international	2.09	2.13	2.05
lack of art -related work opportunities	1.99	1.92	2.04
lack of demand/buyers	1.90	1.93	1.87
level of competition in the industry	2.41	2.46	2.37
high commissions charged by galleries	2.11	2.24	2.02

changing trends which influence demand	2.49	2.49	2.49
1Lack of access to....	2.19	2.13	2.24
skilled labour	2.48	2.46	2.49
finance	1.97	1.95	1.99
funding	1.73	1.58	1.86
raw Materials	2.42	2.36	2.48
professional Support/advice	2.29	2.27	2.31
residency opportunities	2.27	2.17	2.34
Regulatory environment - difficulties associated with...	2.36	2.35	2.39
SARS/tax compliance	2.41	2.41	2.43
customs/trade regulations	2.48	2.51	2.47
labour regulations	2.57	2.48	2.68
lack of professionalism within the industry	2.47	2.47	2.47
lack of internal regulation within the industry	2.42	2.42	2.44
lack of industry promotion from government	2.00	2.09	1.94
business licensing requirements	2.14	2.10	2.18
issues related to the freedom of expression	2.40	2.30	2.49
Personal Factors	2.48	2.48	2.51
my lack of skills or knowledge	2.57	2.53	2.62
lack of confidence in my own work	2.53	2.56	2.52
lack of support from family & friends	2.49	2.34	2.70
demands on my time at home	2.31	2.48	2.21
Discrimination	2.55	2.63	2.50
physical disability or illness	2.55	2.90	2.38
psychological condition or mental illness	2.62	2.80	2.50
racial discrimination	2.35	2.40	2.28
gender discrimination	2.54	2.60	2.48
discrimination because of my lack of qualifications	2.43	2.39	2.50
discrimination because of my nationality	2.40	2.33	2.50
discrimination because I am a person with a disability	2.94	3.00	2.89
Other (Please specify)...	0	0	0

% (OVERALL)	Major	Moderate	Minor	Irrelevant
The high cost of....	11	38	23	28
materials and supplies	27	44	21	8
renting or acquiring space	13	37	20	31
utilities (electricity, etc)	2	38	31	28
communication (cell phone, landline, email etc)	4	40	26	30
technology	8	36	25	31
staging an exhibition	18	49	20	13
labour (assistants, staff, etc)	2	23	20	54
Market Conditions	13	47	22	18
shortage of exhibition/project opportunities - local	19	49	16	16
shortage of exhibition/project opportunities - international	9	58	17	16
lack of art -related work opportunities	16	55	15	14
lack of demand/buyers	26	48	17	8
level of competition in the industry	1	43	33	23

high commissions charged by galleries	14	44	23	19
changing trends which influence demand	2	30	36	32
1Lack of access to....	10	40	21	29
skilled labour	2	21	24	53
finance	17	60	14	10
funding	33	43	10	14
raw Materials	3	31	31	35
professional Support/advice	5	43	27	24
residency opportunities	3	41	20	36
Regulatory environment - difficulties associated with...	5	26	22	47
SARS/tax compliance	2	24	23	51
customs/trade regulations	1	22	23	55
labour regulations	0	15	19	66
lack of professionalism within the industry	1	30	29	40
lack of internal regulation within the industry	1	32	26	41
lack of industry promotion from government	20	39	20	21
business licensing requirements	9	31	17	43
issues related to the freedom of expression	2	20	18	60
Personal Factors	3	21	24	52
my lack of skills or knowledge	0	17	24	58
lack of confidence in my own work	2	17	25	57
lack of support from family & friends	1	17	19	63
demands on my time at home	7	32	29	32
Discrimination	1	10	12	77
physical disability or illness	2	2	9	87
psychological condition or mental illness	1	2	7	89
racial discrimination	2	26	18	54
gender discrimination	0	16	19	65
discrimination because of my lack of qualifications	2	12	14	72
discrimination because of my nationality	2	8	9	81
discrimination because I am a person with a disability	0	0	7	93
Other (Please specify)...				

% (BLACK)	Major	Moderate	Minor	Irrelevant
The high cost of....	12	44	23	22
materials and supplies	36	37	22	5
renting or acquiring space	14	47	15	25
utilities (electricity, etc)	1	51	26	22
communication (cell phone, landline, email etc)	8	56	19	18
technology	7	48	25	21
staging an exhibition	14	48	29	9
labour (assistants, staff, etc)	2	19	25	55
Market Conditions	12	52	24	12
shortage of exhibition/project opportunities - local	21	60	14	6
shortage of exhibition/project opportunities - international	6	68	18	9

lack of art -related work opportunities	20	62	12	7
lack of demand/buyers	25	49	19	7
level of competition in the industry	2	44	43	11
high commissions charged by galleries	7	49	26	18
changing trends which influence demand	2	34	39	26
1Lack of access to....	13	46	20	22
skilled labour	2	26	28	45
finance	16	69	11	5
funding	45	46	5	4
raw Materials	4	38	29	28
professional Support/advice	7	48	29	16
residency opportunities	5	47	17	32
Regulatory environment - difficulties associated with...	3	33	22	41
SARS/tax compliance	3	26	25	45
customs/trade regulations	0	25	25	50
labour regulations	0	23	21	57
lack of professionalism within the industry	0	32	28	39
lack of internal regulation within the industry	1	37	29	32
lack of industry promotion from government	12	49	19	21
business licensing requirements	9	43	16	32
issues related to the freedom of expression	2	27	16	55
Personal Factors	1	24	25	50
my lack of skills or knowledge	1	22	27	50
lack of confidence in my own work	0	16	20	65
lack of support from family & friends	2	30	20	48
demands on my time at home	2	29	33	35
Discrimination	1	12	15	72
physical disability or illness	0	1	9	90
psychological condition or mental illness	0	2	8	90
racial discrimination	2	32	26	39
gender discrimination	0	17	25	58
discrimination because of my lack of qualifications	3	19	19	60
discrimination because of my nationality	3	12	12	74
discrimination because I am a person with a disability	0	0	8	92
Other (Please specify)...				

% (WHITE)	Major	Moderate	Minor	Irrelevant
The high cost of....	10	35	22	29
materials and supplies	20	49	21	10
renting or acquiring space	10	34	11	18
utilities (electricity, etc)	4	28	36	33
communication (cell phone, landline, email etc)	1	29	31	39
technology	9	28	25	38
staging an exhibition	21	51	13	15
labour (assistants, staff, etc)	3	28	17	53

Market Conditions	13	43	21	23
shortage of exhibition/project opportunities - local	19	41	18	22
shortage of exhibition/project opportunities - international	12	51	17	20
lack of art -related work opportunities	14	51	17	18
lack of demand/buyers	28	47	16	9
level of competition in the industry	1	41	26	32
high commissions charged by galleries	19	41	20	20
changing trends which influence demand	2	28	33	36
1Lack of access to....	8	36	22	34
skilled labour	1	18	22	58
finance	17	53	16	15
funding	23	42	12	23
raw Materials	3	26	31	40
professional Support/advice	4	39	26	30
residency opportunities	1	37	22	39
Regulatory environment - difficulties associated with...	5	21	22	51
SARS/tax compliance	2	21	21	56
customs/trade regulations	1	19	21	59
labour regulations	0	9	19	72
lack of professionalism within the industry	2	27	30	41
lack of internal regulation within the industry	1	28	24	47
lack of industry promotion from government	25	33	20	22
business licensing requirements	9	20	18	52
issues related to the freedom of expression	2	15	21	63
Personal Factors	4	18	24	54
my lack of skills or knowledge	0	14	23	64
lack of confidence in my own work	3	18	29	50
lack of support from family & friends	1	7	20	73
demands on my time at home	11	33	26	31
Discrimination	1	8	9	82
physical disability or illness	3	4	9	85
psychological condition or mental illness	1	3	7	88
racial discrimination	2	20	12	66
gender discrimination	0	15	14	71
discrimination because of my lack of qualifications	1	7	10	82
discrimination because of my nationality	1	5	7	87
discrimination because I am a person with a disability	0	1	6	93
Other (Please specify)...				

Others include: lack of money and time, lack of safety, may be forced to relocate, absence of royalties, chronic illness, ceramics is not art but a craft, no appreciation, ceramics, RSA politics, cultural discrimination

3.20 Unemployment/Economic Inactivity

During the last five years, have there been significant periods (I.e. more than three months) in which you have been economically inactive (unable to generate income from your work or other employment), excluding time spent in study or training?

	N	%
No	106	43
Yes	139	57
TOTAL	245	100

	Black	White	Black %	White %
No	30	73	29	52
Yes	72	67	71	48
TOTAL	102	140	100	100

	M	F	M %	F %
No	50	56	41	46
Yes	72	67	59	54
TOTAL	122	123	100	100

N	Black Male	Black Female	White Male	White Female
No	19	11	30	43
Yes	53	19	19	48
TOTAL	72	30	49	91

N	Black Male	Black Female	White Male	White Female
No	26,4	36,7	61,2	47,3
Yes	73,6	63,3	38,8	52,7
TOTAL	100	100	100	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	32	34	66
Western Cape	25	33	58
Kwazulu Natal	24	23	47
Free State & EC	12	22	34
Other provinces	13	27	40
TOTAL	106	139	245

(% (professionals Only)	No	Yes
Gauteng	48	52
Western Cape	43	57
Kwazulu Natal	51	49
Free State & EC	35	65
Other provinces	33	68
TOTAL	43	57

3.21 Most Important Professional Development Needs

What do you see as your MOST important professional development need? (choose ONE)

	N	%
Opportunities for research and study related to my practice	34	14
Finding a gallerist/dealer to represent me/show my work	52	21
Learning how to manage my finances properly	4	2
Learning how to market myself more effectively	74	30
Learning new technologies relevant to my practice	14	6
Acquiring legal skills/knowledge relevant to my practice	3	1
Help with obtaining funding	25	10
Help with obtaining corporate sponsorship	10	4
Help with accessing international opportunities	19	8
Increased web presence (marketing, distribution ...)	2	1
Other (specify)	6	2
TOTAL	243	100

	Black	White	Black %	White %
Opportunities for research and study related to my practice	12	21	12	15
Finding a gallerist/dealer to represent me/show my work	26	26	26	19
Learning how to manage my finances properly	2	2	2	1
Learning how to market myself more effectively	26	47	26	34
Learning new technologies relevant to my practice	4	10	4	7
Acquiring legal skills/knowledge relevant to my practice	2	1	2	1
Help with obtaining funding	13	12	13	9
Help with obtaining corporate sponsorship	9	1	9	1
Help with accessing international opportunities	6	13	6	9
Increased web presence (marketing, distribution ...)	1	1	1	1
Other (specify)	0	5	0	4
TOTAL	101	139	100	100

	M	F	M %	F %
Opportunities for research and study related to my practice	14	20	12	16
Finding a gallerist/dealer to represent me/show my work	30	22	25	18
Learning how to manage my finances properly	3	1	2	1
Learning how to market myself more effectively	32	42	26	34
Learning new technologies relevant to my practice	8	6	7	5
Acquiring legal skills/knowledge relevant to my practice	0	3	0	2
Help with obtaining funding	12	13	10	11
Help with obtaining corporate sponsorship	8	2	7	2
Help with accessing international opportunities	11	8	9	7
Increased web presence (marketing, distribution ...)	1	1	1	1
Other (specify)	2	4	2	3
TOTAL	121	122	100	100

Other include: time (2), focus on kids schooling, computer literacy

What do you see as your SECOND MOST important professional development need?

	N	%
Opportunities for research and study related to my practice	17	7
Finding a gallerist/dealer to represent me/show my work	38	16
Learning how to manage my finances properly	18	7

Learning how to market myself more effectively	34	14
Learning new technologies relevant to my practice	16	7
Acquiring legal skills/knowledge relevant to my practice	6	2
Help with obtaining funding	39	16
Help with obtaining corporate sponsorship	13	5
Help with accessing international opportunities	37	15
Increased web presence (marketing, distribution ...)	18	7
Other (specify)	5	2
TOTAL	241	100

	Black	White	Black %	White %
Opportunities for research and study related to my practice	8	9	8	7
Finding a gallerist/dealer to represent me/show my work	11	27	11	20
Learning how to manage my finances properly	12	6	12	4
Learning how to market myself more effectively	9	25	9	18
Learning new technologies relevant to my practice	6	10	6	7
Acquiring legal skills/knowledge relevant to my practice	5	1	5	1
Help with obtaining funding	28	10	27	7
Help with obtaining corporate sponsorship	3	10	3	7
Help with accessing international opportunities	15	20	15	15
Increased web presence (marketing, distribution ...)	4	14	4	10
Other (specify)	1	4	1	3
TOTAL	102	136	100	100

	M	F	M %	F %
Opportunities for research and study related to my practice	9	8	7	7
Finding a gallerist/dealer to represent me/show my work	24	14	20	12
Learning how to manage my finances properly	11	7	9	6
Learning how to market myself more effectively	13	21	11	18
Learning new technologies relevant to my practice	6	10	5	8
Acquiring legal skills/knowledge relevant to my practice	3	3	2	3
Help with obtaining funding	20	19	17	16
Help with obtaining corporate sponsorship	7	6	6	5
Help with accessing international opportunities	21	16	17	13
Increased web presence (marketing, distribution ...)	6	12	5	10
Other (specify)	1	4	1	3
TOTAL	121	120	100	100

Other: own studio, time, sabbatical

3.22 Future Outlook

How do you generally feel about your future in the sector? (choose ONE)

	N	%
Very positive	66	27
Positive	117	48
Neutral	35	14
Negative	20	8
Very negative	4	2

Uncertain	3	1
TOTAL	245	100

	Black	White	Black %	White %
Very positive	32	33	31	24
Positive	42	73	41	52
Neutral	12	23	12	16
Negative	11	9	11	6
Very negative	2	2	2	1
Uncertain	3	0	3	0
TOTAL	102	140	100	100

	M	F	M %	F %
Very positive	39	27	32	22
Positive	54	63	44	51
Neutral	17	18	14	15
Negative	8	12	7	10
Very negative	2	2	2	2
Uncertain	2	1	2	1
TOTAL	122	123	100	100

N (professionals Only)	Very positive	Positive	Neutral	Negative	Very negative	Uncertain	TOTAL
Gauteng	23	28	10	2	1	2	66
Western Cape	13	34	6	5	0	0	58
Kwazulu Natal	11	25	5	5	1	0	47
Free State & EC	8	16	7	2	1	0	34
Other provinces	11	14	7	6	1	1	40
TOTAL	66	117	35	20	4	3	245

(% (professionals Only)	Very positive	Positive	Neutral	Negative	Very negative	Uncertain
Gauteng	35	42	15	3	2	3
Western Cape	22	59	10	9	0	0
Kwazulu Natal	23	53	11	11	2	0
Free State & EC	24	47	21	6	3	0
Other provinces	28	35	18	15	3	3
TOTAL	27	48	14	8	2	1

Retirement/Medical Aid/Insurance

3.23 Provision for Retirement

Do you have any of the following types of provision for retirement in place? (if 'None of the above' go to 3.25)

	N	%
Pension Fund	31	13
Provident Fund	15	6
Retirement Annuity	42	17

Investment in stocks	27	11
Savings	72	29
None of the above	115	47
TOTAL	187	

	Black	White	Black %	White %
Pension Fund	9	21	9	15
Provident Fund	2	13	2	9
Retirement Annuity	6	35	6	25
Investment in stocks	7	19	7	14
Savings	24	48	24	34
None of the above	65	50	64	36

	M	F	M %	F %
Pension Fund	16	15	13	12
Provident Fund	5	10	4	8
Retirement Annuity	23	19	19	15
Investment in stocks	13	14	11	11
Savings	34	38	28	31
None of the above	63	52	52	42

N (professionals Only)	Pension Fund	Provident Fund	Retirement Annuity	Investment in stocks	Savings	None of the above
Gauteng	7	3	13	9	22	29
Western Cape	4	5	16	6	21	20
Kwazulu Natal	3	4	6	6	11	27
Free State & EC	7	2	4	4	10	16
Other provinces	10	1	3	2	8	23
TOTAL	31	15	42	27	72	115

% (professionals Only)	Pension Fund	Provident Fund	Retirement Annuity	Investment in stocks	Savings	None of the above
Gauteng	11	5	20	14	33	44
Western Cape	7	9	28	10	36	34
Kwazulu Natal	6	9	13	13	23	57
Free State & EC	21	6	12	12	29	47
Other provinces	25	3	8	5	20	58

3.24 Perception of Adequacy of Provision for Retirement

Do you regard these provisions as adequate?

	N	%
Yes	42	20
No	144	67
Don't know	28	13
TOTAL	214	100

	Black	White	Black %	White %
Yes	18	24	23	18

No	45	96	58	72
Don't know	14	14	18	10
TOTAL	77	134	100	100

	M	F	M %	F %
Yes	23	19	23	17
No	61	83	60	74
Don't know	18	10	18	9
TOTAL	102	112	100	100

N (professionals Only)	Yes	No	Don't know	TOTAL
Gauteng	12	37	9	58
Western Cape	8	41	7	56
Kwazulu Natal	8	20	1	29
Free State & EC	5	22	5	32
Other provinces	9	24	6	39
TOTAL	42	114	28	214

% (professionals Only)	Yes	No	Don't know
Gauteng	21	64	16
Western Cape	14	73	13
Kwazulu Natal	28	69	3
Free State & EC	16	69	16
Other provinces	23	62	15
TOTAL	20	53	13

3.25 Perception of Adequacy of Social Grants from the State for Retirement Purposes

If you have made no provision for retirement do you feel that the provisions of social grants for the elderly provided by the state will be adequate for your needs?

	N	%
Yes	10	5
No	160	80
Don't know	29	15
TOTAL	199	100

N (professionals Only)	Yes	No	Don't know	TOTAL
Gauteng	4	42	9	55
Western Cape	1	38	8	47
Kwazulu Natal	0	35	4	39
Free State & EC	2	22	4	28
Other provinces	3	23	4	30
TOTAL	10	160	29	199

% (professionals Only)	Yes	No	Don't know
Gauteng	7	76	16
Western Cape	2	81	17

Kwazulu Natal	0	90	10
Free State & EC	7	79	14
Other provinces	10	77	13
TOTAL	5	80	15

3.26 Insurance

Have you ever taken out any of the following types of insurance related to your business/work?

	N	%
Accident Insurance	33	13
Vehicle insurance	70	29
Travel insurance	52	21
Professional Indemnity insurance	11	4
Freight Insurance	28	11
Income Protection Plan	16	7
Office/Studio Contents Insurance	48	20
None of the above	117	48
TOTAL	375	

3.27 Medical Cover

Are you a member of a medical scheme or hospital plan?

	N	%
Medical Scheme	91	37
Hospital Plan	44	19
Neither	108	44
TOTAL	243	100

	Black	White	Black %	White %
Medical Scheme	14	76		
Hospital Plan	7	37		
Neither	80	26		
TOTAL	101	139	100	100

	M	F	M %	F %
Medical Scheme	31	60		
Hospital Plan	15	29		
Neither	76	32		
TOTAL	122	121	100	100

N (professionals Only)	Medical Scheme	Hospital Plan	Neither	TOTAL
Gauteng	25	11	30	66
Western Cape	22	19	17	58
Kwazulu Natal	14	8	25	47
Free State & EC	11	6	17	34
Other provinces	19	0	19	38
TOTAL	91	44	108	243

% (professionals Only)	Medical Scheme	Hospital Plan	Neither
Gauteng	38	17	45
Western Cape	38	33	29
Kwazulu Natal	30	17	53
Free State & EC	32	18	50
Other provinces	50	0	50
TOTAL	37	18	44

3.28 Reasons for not Having Medical Cover

If you answered "neither" to the previous question, which of the following statements most accurately describes your reason for not having medical cover?

	N	%
Cannot afford	86	35
Economical	24	10
Happy	4	2
TOTAL	114	

N (professionals Only)	Cannot afford	Economical	Happy
Gauteng	24	7	2
Western Cape	12	7	0
Kwazulu Natal	21	4	0
Free State & EC	12	3	1
Other provinces	17	3	1
TOTAL	86	24	4

% (professionals Only)	Cannot afford	Economical	Happy
Gauteng	36	11	3
Western Cape	21	12	0
Kwazulu Natal	45	9	0
Free State & EC	35	9	3
Other provinces	43	8	3

4. Funding

4.1 Number of Artists Applying for Funding

During the last three years have you APPLIED FOR funding from a governmental or private source?

	N	%
No	153	62
Yes	92	38
TOTAL	245	100

	Black	White	Black %	White %
No	54	97	53	69
Yes	48	43	47	31

TOTAL	102	140	100	100

	M	F	M %	F %
No	76	77	62	63
Yes	46	46	38	37
TOTAL	122	123	100	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	32	34	66
Western Cape	40	18	58
Kwazulu Natal	37	10	47
Free State & EC	18	16	34
Other provinces	26	14	40
TOTAL	153	92	245

(% (professionals Only)	No	Yes
Gauteng	48	52
Western Cape	69	31
Kwazulu Natal	79	21
Free State & EC	53	47
Other provinces	65	35
TOTAL	62	38

4.2 Reasons for Not Applying for Funding

If NO, what was the MAIN reason for not applying for funding? (choose ONE and then go to 4.6.1)

	N	%
No experience in writing proposals	26	17
My writing skills are poor	0	0
It is pointless, I would fail to get it	31	20
the available grants are inadequate for my needs	4	3
It depends on whom you know	10	7
Admin compliance requirements of funders	17	11
Do not need funding for my work	45	29
Other (specify)	20	13
TOTAL	153	100

	Black	White	Black %	White %
No experience in writing proposals	17	9	26	10
My writing skills are poor	0	0	0	0
It is pointless, I would fail to get it	22	10	33	12
the available grants are inadequate for my needs	0	4	0	5
It depends on whom you know	6	4	9	5
Admin compliance requirements of funders	12	5	18	6
Do not need funding for my work	4	39	6	45
Other (specify)	5	15	8	17
TOTAL	66	86	100	100

N	GP	WC	KZN	FS/EC	Other	TOTAL

No experience in writing proposals	7	5	6	3	5	26
My writing skills are poor	0	0	0	0	0	0
It is pointless, I would fail to get it	3	7	10	4	7	31
the available grants are inadequate for my needs	2	0	0	0	2	4
It depends on whom you know	3	2	3	2	0	10
Admin compliance requirements of funders	5	1	4	3	4	17
Do not need funding for my work	8	18	9	3	7	45
Other (specify)	4	7	3	3	3	20

%	GP	WC	KZN	FS/EC	Other	TOTAL
No experience in writing proposals	22	13	17	17	18	17
My writing skills are poor	0	0	0	0	0	0
It is pointless, I would fail to get it	9	18	29	22	25	20
the available grants are inadequate for my needs	6	0	0	0	7	3
It depends on whom you know	9	5	9	11	0	7
Admin compliance requirements of funders	16	3	11	17	14	11
Do not need funding for my work	25	45	26	17	25	29
Other (specify)	13	18	9	17	11	13

Others include not aware (6), Community based projects, govt disability grant, university bursary, cannot repay, studies, never tried

4.3 Funders Applied to

If YES, which of the following have you applied to?:

	N	%
National Arts Council	44	18
National Lottery	6	2
Department of Arts and Culture	23	9
Provincial government	10	4
Local government	4	2
Business Arts South Africa	5	2
Arts and Culture Trust	7	3
International Arts Funding Body	12	5
Private Foundation	18	7
Corporate sponsorship	11	4
Corporate funding	11	4
Patron	4	2
Arts organisation	11	4
TOTAL	166	

N	Black	White
National Arts Council	26	18
National Lottery	1	5
Department of Arts and Culture	13	10
Provincial government	8	2
Local government	4	0
Business Arts South Africa	2	3

Arts and Culture Trust	4	3
International Arts Funding Body	3	9
Private Foundation	6	12
Corporate sponsorship	3	8
Corporate funding	7	4
Patron	1	3
Arts organisation	4	7
TOTAL	82	84

%	Black	White
National Arts Council	25	13
National Lottery	1	4
Department of Arts and Culture	13	7
Provincial government	8	1
Local government	4	0
Business Arts South Africa	2	2
Arts and Culture Trust	4	2
International Arts Funding Body	3	6
Private Foundation	6	9
Corporate sponsorship	3	6
Corporate funding	7	3
Patron	1	2
Arts organisation	4	5

4.4 Funding Application Success Rates

Did you receive funding from any of these sources?

	N	% of all	% of those who applied
National Arts Council	28	11	64
National Lottery	2	1	33
Department of Arts and Culture	6	2	26
Provincial government	3	1	30
Local government	2	1	50
Business Arts South Africa	2	1	40
Arts and Culture Trust	1	0	14
International Arts Funding Body	8	3	67
Private Foundation	9	4	50
Corporate sponsorship	6	2	55
Corporate funding	5	2	45
Patron	3	2	75
Arts organisation	8	3	73
Did not receive any funding	31	11	
TOTAL	116		

	Black	White	Black %	White %
National Arts Council	13	14	13	10
National Lottery	0	2	0	1
Department of Arts and Culture	4	2	4	1

Provincial government	3	0	3	0
Local government	2	0	2	0
Business Arts South Africa	1	1	1	1
Arts and Culture Trust	0	1	0	1
International Arts Funding Body	1	7	1	5
Private Foundation	1	8	1	6
Corporate sponsorship	0	6	0	4
Corporate funding	2	3	2	2
Patron	0	4	0	4
Arts organisation	2	6	2	4
Did not receive any funding	26	32	25	23

Success rate of funding applications	%
National Arts Council	64
National Lottery	33
Department of Arts and Culture	26
Provincial government	30
Local government	50
Business Arts South Africa	40
Arts and Culture Trust	14
International Arts Funding Body	67
Private Foundation	50
Corporate sponsorship	55
Corporate funding	45
Patron	75
Arts organisation	73

Success rate of funding applications	Black %	White %
National Arts Council	50	78
National Lottery	0	40
Department of Arts and Culture	31	20
Provincial government	38	0
Local government	50	0
Business Arts South Africa	50	33
Arts and Culture Trust	0	33
International Arts Funding Body	33	78
Private Foundation	17	67
Corporate sponsorship	0	75
Corporate funding	29	75
Patron	0	100
Arts organisation	50	86

4.5 Funders Regarded as Being Most Responsive to Needs of Visual Arts Sector

Of those funding sources that you have applied to, which do you regard as being the most responsive to the needs of the visual arts sector? (choose ONE)

	N	%
National Arts Council	35	37
National Lottery	6	6

Department of Arts and Culture	7	7
Provincial government	2	2
Local government	2	2
Business Arts South Africa	4	4
Arts and Culture Trust	4	4
International Arts Funding Body	8	9
Private Foundation	7	7
Corporate sponsorship	5	5
Corporate funding	1	1
Patron	3	3
Arts organisation	10	11
TOTAL	94	100

4.6 Views on Most Important Purposes for Arts Funding

What do you regard as the MOST important purpose for arts funding in general? (choose ONE)

	N	%
supporting artists to produce their creative work	117	49
promoting capacity-building and networking (workshops, conferences, courses, etc)	23	10
building new audiences (through for example art education programmes)	20	8
developing new markets	18	7
enabling international exposure and linkage for South African artists and/or galleries	22	9
developing new talent (eg through mentorships, apprenticeships, etc)	12	5
broadening access to participation in the arts (eg art education programming)	25	10
subsidising innovative arts media	4	2
Research	0	0
TOTAL	241	100

What do you regard as the SECOND MOST important purpose for arts funding in general? (choose ONE)

	N	%
Supporting artists to produce their creative work	46	19
Promoting capacity-building	34	14
supporting artists to produce their creative work	22	9
promoting capacity-building and networking (workshops, conferences, courses, etc)	46	19
building new audiences (through for example art education programmes)	31	13
developing new markets	22	9
enabling international exposure and linkage for South African artists and/or galleries	26	11
developing new talent (eg through mentorships, apprenticeships, etc)	7	3
broadening access to participation in the arts (eg art education programming)	6	2
TOTAL	241	100

4.7 Views on Most Important Purposes for Arts Funding for Individual Artists

What do you regard as being the MOST important purpose for arts funding for individual artists?

	N	%
Enabling exclusive focus on my creative output and research by covering living costs and/or overheads	66	28
Addressing costs of materials and equipment that I otherwise would not be able to afford	48	20

Enabling further study or training...	29	12
Enabling international or local travel to gain experience, exposure and networking	49	21
Addressing costs of exhibiting work or producing catalogue of work	42	18
Other purpose,	3	1
TOTAL	237	100

N (professionals Only)	Enabling exclusive focus...	Addressing costs of materials...	Enabling further study or training...	Enabling international or local travel...	Addressing costs of exhibiting work...	Other purpose,	TOTAL
Gauteng	24	11	3	17	6	2	63
Western Cape	18	7	11	7	14	0	57
Kwazulu Natal	4	11	5	8	16	1	45
Free State & EC	9	11	5	6	2	0	33
Other provinces	11	8	5	11	4	0	39
TOTAL	66	48	29	49	42	3	237

% (professionals Only)	Enabling exclusive focus...	Addressing costs of materials...	Enabling further study or training...	Enabling international or local travel...	Addressing costs of exhibiting work...	Other purpose,
Gauteng	38	17	5	27	10	3
Western Cape	32	12	19	12	25	0
Kwazulu Natal	9	24	11	18	36	2
Free State & EC	27	33	15	18	6	0
Other provinces	28	21	13	28	10	0
TOTAL	28	20	12	21	18	1

Other include 6, if art sells no need for funding

4.8 Applications for Loan Finance

Have you applied for loan finance from a bank during the course of the last three years?

	N	%
No	194	79
Yes	51	21
TOTAL	245	100

	Black	White	Black %	White %
No	87	105	85	75
Yes	15	35	15	25
TOTAL	102	140	100	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	51	15	66
Western Cape	46	12	58
Kwazulu Natal	35	12	47
Free State & EC	27	7	34
Other provinces	35	5	40

TOTAL	194	51	245

(% (professionals Only)	No	Yes
Gauteng	77	23
Western Cape	79	21
Kwazulu Natal	74	26
Free State & EC	79	21
Other provinces	88	13
TOTAL	79	21

4.9 Reasons for Not Applying for Loan Finance

If NO, what was the reason for not applying?

	N	%
No need for loan finance	86	46
No experience in dealing with banks	22	12
It is pointless, I would fail to get it	39	21
It depends on whom you know	3	2
Admin compliance requirements of banks	19	10
Other (specify)	20	11
TOTAL	189	100

N (professionals Only)	No need	No experience	It is pointless	It depends on whom you know	Admin compliance	Other purpose,	TOTAL
Gauteng	23	8	8	0	6	6	51
Western Cape	24	5	8	0	6	3	46
Kwazulu Natal	13	6	7	1	3	1	31
Free State & EC	13	2	3	1	1	5	25
Other provinces	13	1	13	1	3	5	36
TOTAL	86	22	39	3	19	20	189

% (professionals Only)	No need	No experience	It is pointless	It depends on whom you know	Admin compliance	Other purpose,
Gauteng	45	16	16	0	12	12
Western Cape	52	11	17	0	13	7
Kwazulu Natal	42	19	23	3	10	3
Free State & EC	52	8	12	4	4	20
Other provinces	36	3	36	3	8	14
TOTAL	46	12	21	2	10	11

Others include, can't repay (2), husband finances (3), avoid debt (5), doesn't do loans and parental support, don't qualify (2), interest rate too high, no time

4.10 Success Rate of Applications for Finance

If YES, was your application successful?

	N	%
No	9	18

Yes	42	82
TOTAL	51	100

	Black	White	Black %	White %
No	7	2	47	6
Yes	8	33	53	94
TOTAL	15	35	100	100

4.11 Informal Finance

During the course of the last three years, have you obtained a loan from an informal source such a money-lender, friend or relative?

	N	%
No	181	74
Yes	64	26
TOTAL	245	100

	Black	White	Black %	White %
No	80	98	78	70
Yes	22	42	22	30
TOTAL	102	140	100	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	46	20	66
Western Cape	42	16	58
Kwazulu Natal	42	5	47
Free State & EC	20	14	34
Other provinces	31	9	40
TOTAL	181	64	245

(% (professionals Only)	No	Yes
Gauteng	70	30
Western Cape	72	28
Kwazulu Natal	89	11
Free State & EC	59	41
Other provinces	78	23
TOTAL	74	26

5. Staff/Employees

5.1 Artists as Employers

Do you employ anyone on either a part-time, full-time or occasional basis to assist you with any aspect of your work?

	N	%
No	198	81
Yes	47	19

TOTAL	245	100

	Black	White	Black %	White %
No	89	106	87	76
Yes	13	34	13	24
TOTAL	102	140	100	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	45	21	66
Western Cape	46	12	58
Kwazulu Natal	42	5	47
Free State & EC	30	4	34
Other provinces	35	5	40
TOTAL	198	47	245

(% (professionals Only)	No	Yes
Gauteng	68	32
Western Cape	79	21
Kwazulu Natal	89	11
Free State & EC	88	12
Other provinces	88	13
TOTAL	81	19

5.2 Administrative Staff

How many administrative staff do you employ? (eg book-keeper, PA)

	Total	AVG
Full time	4	0.016
Part-time	16	0.065
Short term contract	12	0.049

5.3 Technical Staff/Assistant

How many technical staff/assistants do you employ?

	Total	AVG
Full time	22	0.090
Part-time	16	0.065
Short term contract	36	0.147

5.4 Specialist Staff

How many specialised staff do you employ? (eg research, PR)

N	Total	AVG
Full time	2	0.008
Part-time	7	0.029

Short term contract	9	0.037

5.5 Staff Demographics

If you do employ staff, please complete the following demographic table to the best of your ability, indicating the number of staff members in each category:

TOTAL	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female	TOTAL
Administrative	2	0	0	1	2	0	2	13	20
Assistants	42	12	3	0	1	0	4	5	67
Specialised	12	3	0	0	0	0	3	4	22
Other	0	4	0	0	0	0	0	0	4
TOTAL	56	19	3	1	3	0	9	22	113

%	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female
Administrative	10	0	0	5	10	0	10	65
Assistants	63	18	4	0	1	0	6	7
Specialised	55	14	0	0	0	0	14	18
Other	0	100	0	0	0	0	0	0
TOTAL	50	17	3	1	3	0	8	19

AVG	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female
Administrative	0.008	0.000	0.000	0.004	0.008	0.000	0.008	0.053
Assistants	0.171	0.049	0.012	0.000	0.004	0.000	0.016	0.020
Specialised	0.049	0.012	0.000	0.000	0.000	0.000	0.012	0.016
Other	0.000	0.016	0.000	0.000	0.000	0.000	0.000	0.000

5.6 Age and Disability

Please indicate numbers of staff by age and disability:

N	Disabled Male	Disabled Female	TOTAL	younger than 36	36+	TOTAL
Administrative	0	1	1	12	7	19
Assistants	0	0	0	38	26	64
Specialised	0	0	0	9	6	15
Other	0	0	0	1	2	3
TOTAL	0	1	1	60	41	101

%	Disabled Male	Disabled Female	younger than 36	36+
Administrative	0	100	63	37
Assistants	0	0	59	41

Specialised	0	0	60	40
Other	0	0	33	67
TOTAL	0	100	59	41

AVG	Disabled Male	Disabled Female	younger than 36	36+
Administrative	0.000	0.004	0.049	0.029
Assistants	0.000	0.000	0.155	0.106
Specialised	0.000	0.000	0.037	0.024
Other	0.000	0.000	0.004	0.008

5.7 Education Levels of Employees

Indicate or estimate how many of the people you employ fall into each of the following categories:

N	N	%	AVG
Tertiary education graduates (postgraduate)	15	15	0.061
University graduates (undergraduate)	14	14	0.057
High school/college graduates?	31	31	0.127
Primary school graduates?	29	29	0.118
Informally trained/no formal education?	12	12	0.049
TOTAL	101	100	

5.8 Employee Benefits

Do you provide employees with any benefits? If yes, indicate which of the following (multiple answers).

	N	%
Pension/Provident Fund	2	4
Savings Plan	0	0
Unemployment Insurance Fund	11	23
Medical Aid	1	2
Hospital Plan	0	0
None of the above	27	57
TOTAL	96	

5.9 Reasons for Non-Provision of Employee Benefits

If not, indicate which of the following most accurately describes why this is the case:

	N	%
Too costly	10	30
Own decisions employees	20	61
Not aware	3	9
TOTAL	33	100

6. Professional Practice Issues

6.1 Perceptions regarding Copyright on Own Artwork

Do you believe you have copyright over artworks that you produce and sell to others?

	N	%
Yes	191	80
No	26	11
Don't know	21	9
TOTAL	238	100

N (professionals Only)	Yes	No	Don't know	TOTAL
Gauteng	51	4	11	66
Western Cape	47	7	4	58
Kwazulu Natal	41	2	1	44
Free State & EC	24	6	4	34
Other provinces	28	7	1	36
TOTAL	191	26	21	238

% (professionals Only)	Yes	No	Don't know
Gauteng	77	6	17
Western Cape	81	12	7
Kwazulu Natal	93	5	2
Free State & EC	71	18	12
Other provinces	78	19	3
TOTAL	80	11	9

6.2 Copyright Collection

Have you ever received payments for the reproduction of artworks or royalties on writing that you have produced?

	N	%
Never	186	79
Once or twice a year	27	11
Frequently, though not a significant income source	14	6
Frequently, this is a significant source of income	9	4
TOTAL	236	100

N (professionals Only)	Never	Once or twice a year	Frequently, not a significant	Frequently, significant source	TOTAL
Gauteng	46	11	5	2	64
Western Cape	40	10	4	4	58
Kwazulu Natal	41	2	2	0	45
Free State & EC	27	2	2	2	33
Other provinces	32	2	1	1	36
TOTAL	186	27	14	9	236

% (professionals Only)	Never	Once or twice a year	Frequently, not a significant	Frequently, significant source
Gauteng	72	17	8	3
Western Cape	69	17	7	7
Kwazulu Natal	91	4	4	0
Free State & EC	82	6	6	6
Other provinces	89	6	3	3
TOTAL	79	11	6	4

6.3 Copyright Assignment

Have you ever assigned copyright in a work of art or piece of writing you produced to someone else?

	N	%
Yes	56	24
No	167	71
Don't know	11	5
TOTAL	234	100

N (professionals Only)	Yes	No	Don't know	TOTAL
Gauteng	19	42	4	65
Western Cape	16	40	2	58
Kwazulu Natal	3	39	0	42
Free State & EC	13	18	3	34
Other provinces	5	28	2	35
TOTAL	56	167	11	234

% (professionals Only)	Yes	No	Don't know
Gauteng	29	65	6
Gauteng	28	69	3
Western Cape	7	93	0
Kwazulu Natal	38	53	9
Free State & EC	14	80	6
Other provinces	24	71	5
TOTAL	29	65	6

6.4 Reasons for Copyright Assignment

If, YES, what was the reason?

	N	%
Required	28	52
Produced as an employee	16	30
Other reason, specify	10	19
TOTAL	54	100

N (professionals Only)	Required	Produced as an employee	Other reason, specify	TOTAL

Gauteng	11	5	2	18
Western Cape	8	6	1	15
Kwazulu Natal	3	0	1	4
Free State & EC	5	4	4	13
Other provinces	1	1	2	4
TOTAL	28	16	10	54

% (professionals Only)	Required	Produced as an employee	Other reason, specify
Gauteng	61	28	11
Western Cape	53	40	7
Kwazulu Natal	75	0	25
Free State & EC	38	31	31
Other provinces	25	25	50
TOTAL	52	30	19

6.5 Copyright Infringement

Are you aware of your copyright over a work ever having been infringed? (eg someone reproducing your work without your permission)

	N	%
No	184	75
Yes	61	25
TOTAL	245	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	52	14	66
Western Cape	37	21	58
Kwazulu Natal	35	12	47
Free State & EC	28	6	34
Other provinces	32	8	40
TOTAL	184	61	245

(% (professionals Only)	No	Yes
Gauteng	79	21
Western Cape	64	36
Kwazulu Natal	74	26
Free State & EC	82	18
Other provinces	80	20
TOTAL	75	25

6.6 Action Taken on Copyright Infringement

If YES, did you take any action to prevent infringement?

	N	%
Yes, action unsuccessful	12	20
Yes, action successful or	16	27

partially successful		
No	31	53
TOTAL	59	100

N (professionals Only)	Yes, action unsuccessful	Yes, action successful or partially successful	No	TOTAL
Gauteng	3	5	5	13
Western Cape	5	6	10	21
Kwazulu Natal	2	3	5	10
Free State & EC	0	1	5	6
Other provinces	2	1	6	9
TOTAL	12	16	31	59

% (professionals Only)	Yes, action unsuccessful	Yes, action successful or partially successful	No
Gauteng	23	38	38
Western Cape	24	29	48
Kwazulu Natal	20	30	50
Free State & EC	0	17	83
Other provinces	22	11	67
TOTAL	20	27	53

6.7 Moral Rights Infringement

Moral rights in artistic work include the right of attribution as a creator, and the right to have the integrity of the work respected and not altered, defaced, damaged or destroyed. As far as you are aware, have you ever had your moral rights infringed?

	N	%
No	182	74
Yes	63	26
TOTAL	245	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	45	21	66
Western Cape	40	18	58
Kwazulu Natal	41	6	47
Free State & EC	24	10	34
Other provinces	32	8	40
TOTAL	182	63	245

(% (professionals Only)	No	Yes
Gauteng	68	32
Western Cape	69	31
Kwazulu Natal	87	13
Free State & EC	71	29
Other provinces	80	20
TOTAL	74	26

If YES, what was the nature of the infringement?

	N	%
Work was damaged or destroyed	22	36
Work was altered	13	21
Not acknowledged as the creator	22	36
Other	4	7
TOTAL	61	100

N (professionals Only)	Work was damaged or destroyed	Work was altered	Not acknowledged as the creator	Other	TOTAL
Gauteng	7	6	7	0	20
Western Cape	7	3	8	0	18
Kwazulu Natal	4	0	2	0	6
Free State & EC	2	2	1	4	9
Other provinces	2	2	4	0	8
TOTAL	22	13	22	4	61

% (professionals Only)	Work was damaged or destroyed	Work was altered	Not acknowledged as the creator	Other
Gauteng	35	30	35	0
Western Cape	39	17	44	0
Kwazulu Natal	67	0	33	0
Free State & EC	22	22	11	44
Other provinces	25	25	50	0
TOTAL	36	21	36	7

Other include bad copy, stolen, abuse from lecturers,

6.8 Membership of Industry Associations/Organisations

Are you a member of an industry organisation or association? (eg Ceramics SA, SANAVA and affiliates, VANSAs)

	N	%
No	154	63
Yes	91	37
TOTAL	245	100

	Black	White	Black %	White %
No	73	80	72	57
Yes	29	60	28	43
TOTAL	102	140	100	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	44	22	66
Western Cape	26	29	58
Kwazulu Natal	38	9	47

Free State & EC	22	12	34
Other provinces	21	19	40
TOTAL	154	91	245

(% (professionals Only)	No	Yes
Gauteng	67	33
Western Cape	45	50
Kwazulu Natal	81	19
Free State & EC	65	35
Other provinces	53	48
TOTAL	63	37

If NO, which of the following most accurately describes the reasons for not being a member? (can choose more than one)

	N	%
Not aware	50	20
Not interested	27	11
Don't believe any real benefits	48	20
Don't know what the benefits are	46	19
TOTAL	171	

N (professionals Only)	Not aware	Not interested	Don't believe any real benefits	Don't know what the benefits are	TOTAL
Gauteng	15	6	13	20	54
Western Cape	11	4	13	6	34
Kwazulu Natal	8	7	9	13	37
Free State & EC	6	4	11	5	26
Other provinces	10	6	2	2	20
TOTAL	50	27	48	46	171

N (professionals Only)	Not aware	Not interested	Don't believe any real benefits	Don't know what the benefits are
Gauteng	23	9	20	30
Western Cape	17	6	20	9
Kwazulu Natal	12	11	14	20
Free State & EC	9	6	17	8
Other provinces	15	9	3	3

If YES, what do you see as being the MOST significant benefit you obtain from this membership (choose ONE)

	N	%
Information	40	25
Advice	1	1
Networking	24	26
Marketing Opportunities	13	14
Training/Professional Development	5	5
Access to funding opportunities	4	4
Peer Support	1	1

Other, specify	3	3
TOTAL	91	100

Other include all of them, residency abroad

6.9 Use of Computers

How do you use computers in your work?

	N	%
Administration	160	65
Networking	148	60
Internet-based research	167	68
As a creative medium	118	48
On-line marketing/sales	83	34
Do not use computers	29	12
Other purpose, specify:	4	2
TOTAL	709	

N (professionals Only)	Administration	Networking	Internet-based research	As a creative medium	On-line marketing/sales	Do not use computers	Other	TOTAL
Gauteng	48	49	52	36	25	2	3	215
Western Cape	45	38	41	34	22	2	1	183
Kwazulu Natal	30	30	30	20	17	8	0	135
Free State & EC	18	16	19	16	11	9	0	89
Other provinces	19	15	25	12	8	8	0	87
TOTAL	160	148	167	118	83	29	4	709

% (professionals Only)	Administration	Networking	Internet-based research	As a creative medium	On-line marketing/sales	Do not use computers	Other
Gauteng	73	74	79	55	38	3	5
Western Cape	68	58	62	52	33	3	2
Kwazulu Natal	45	45	45	30	26	12	0
Free State & EC	27	24	29	24	17	14	0
Other provinces	29	23	38	18	12	12	0
TOTAL	73	74	79	55	38	3	5

7. Finances

7.1 Annual Income

Please indicate or estimate (even very roughly) your total income for 2008, from ALL sources (both arts-related and non-arts related)

N	232
mean	149,809
p25	41,000

p50	90,000
min	400
max	2,000,000

	Black	White
N	101	128
mean	87,498	198,316
p25	25,000	60,750
p50	60,000	120,000
min	400	5,000
max	800,000	2,000,000

	M	F
N	119	113
mean	149,673	149,953
p25	40,000	42,000
p50	80,000	95,000
min	800	400
max	2,000,000	1,785,467

	Black Male	Black Female	White Male	White Female
N	71	30	47	81
mean	95,876	67,669	229,870	180,007
p25	32,000	19,400	65,500	60,000
p50	60,000	45,250	145,000	120,000
min	800	400	18,500	5,000
max	800,000	440,000	2,000,000	1,785,467

Income by Province (Professionals only) - all	N	mean	p25	median	min	max
Gauteng	66	151,998	50,000	95,000	2,000	1,700,000
Western Cape	51	186,616	50,000	94,000	20,000	2,000,000
Kwazulu Natal	45	184,299	48,000	96,000	7,000	1,785,467
Free State & EC	32	101,203	34,750	81,100	800	390,000
Other provinces	38	96,696	12,000	46,000	400	600,000
TOTAL	232	149,809	41,000	90,000	400	2,000,000

Income by Age	N	mean	p25	p50	min	max
20-25	19	80,895	16,500	40,000	2,000	800,000
26-35	87	103,395	42,500	80,000	800	440,000
36-45	56	213,203	48,000	90,750	5,000	2,000,000
46-55	36	169,456	37,500	120,000	400	1,200,000
56-70	28	196,294	45,000	128,000	12,000	1,700,000
> 70	4	86,850	76,200	87,700	72,000	100,000
Total	230	149,634	40,000	89,990	400	2,000,000

Income by percentage of time spent producing	N	mean	p25	p50	min	max

creative work						
0-25% of time	58	129,281	40,000	93,000	400	625,000
25-70% of time	134	144,895	42,800	89,990	800	2,000,000
70-100% of time	40	196,037	36,000	85,680	8,000	1,700,000
Total	232	149,809	41,000	90,000	400	2,000,000

7.2 Annual Income Breakdown

Please indicate or estimate (however roughly) what amount of this annual income was earned through:

	N	% artists generating income from this source	mean	total	% of all income across sample
Income directly related to creative work				15,856,998	50,13
Private Sales (from your home/studio)	142	67,6	34,618	4,915,816	15,54
Sales through galleries	104	49,5	58,594	6,093,774	19,26
On-line sales	18	8,6	24,583	442,500	1,40
Fees from private commissions	60	28,6	43,401	2,604,030	8,23
Fees from public commissions	18	8,6	13,868	249,620	0,79
Income from royalties	9	4,3	6,157	55,413	0,18
Prizes and Awards	11	5,2	31,226	343,485	1,09
Funding agency grant - international	4	1,9	82,250	329,000	1,04
Funding agency grant - local	10	4,8	19,630	196,300	0,62
Government grant (non arts funding agency)	1	0,5	5,000	5,000	0,02
Corporate Sponsorship	8	3,8	17,113	136,900	0,43
Individual patronage	15	7,1	19,837	297,560	0,94
Fellowship or research grant	6	2,9	31,267	187,600	0,59
Income derived from other activities related to creative work:		0,0		10,908,973	34,48
Teaching (in the arts)	82	39,0	75,559	6,195,862	19,59
Community Arts work	14	6,7	22,227	311,180	0,98
Working in a gallery	11	5,2	24,368	268,050	0,85
Provision of other Art-Related Products & Services	31	14,8	133,351	4,133,881	13,07
Income derived from non-arts related work or sources:		0,0		4,868,923	15,39
Income from work outside the sector	41	19,5	70,594	2,894,340	9,15
Social Grant	4	1,9	8,680	34,720	0,11
Pension	6	2,9	53,380	320,280	1,01
Investments	16	7,6	32,549	520,783	1,65
Other (specify)	23	11,0	47,774	1,098,800	3,47
TOTAL				31,634,893	100,00

7.3 Income Outlook

Do you expect your total income to be higher, lower or about the same this year? (single response)

	N	%
Higher	122	51
Lower	54	23
About the same	64	27
TOTAL	240	100

	Black	White	Black %	White %
Higher	65	55	64	40
Lower	17	37	17	27
About the same	19	44	19	32
TOTAL	101	136	100	100

N (professionals Only)	Higher	Lower	About the same	TOTAL
Gauteng	32	13	20	65
Western Cape	26	15	14	55
Kwazulu Natal	25	8	14	47
Free State & EC	18	11	5	34
Other provinces	21	7	11	39
TOTAL	122	54	64	240

% (professionals Only)	Higher	Lower	About the same
Gauteng	49	20	31
Western Cape	47	27	25
Kwazulu Natal	53	17	30
Free State & EC	53	32	15
Other provinces	54	18	28
TOTAL	51	23	27

7.4 Percentage of Income Derived from Regular Monthly Sources

What percentage of your income is derived from regular monthly sources, as opposed to (irregular) once-off sales, commissions and so on?

AVG	
%	59

AVG	Black	White
%	53	62

AVG (professionals Only)	%
Gauteng	63
Western Cape	65
Kwazulu Natal	62
Free State & EC	56

Other provinces	47
TOTAL	59

7.5 Annual Expenditure

Please indicate or estimate your total work-related expenditure in the financial year ending in 2008

Expenditure	
N	234
mean	72,313
p25	12,000
p50	29,900
min	100
max	2,100,000

	Black	White
N	102	140
mean	58,440	77,080
p25	5,500	13,145
p50	19,700	30,000
min	0	0
max	2,100,000	1,500,000

	M	F
N	122	123
mean	66,768	71,345
p25	10,000	8,000
p50	20,850	30,000
min	0	0
max	1,500,000	2,100,000

Expenditure by Province (Professionals only) - all	N	mean	p25	p50	min	max
Gauteng	66	93,089	16,000	37,500	0	2,100,000
Western Cape	58	83,823	10,000	27,800	0	1,500,000
Kwazulu Natal	47	71,273	6,000	20,000	0	1,071,279
Free State & EC	34	31,465	9,000	20,000	0	90,000
Other provinces	40	37,397	5,000	15,000	0	550,000
TOTAL	245	69,066	10,000	25,000	0	2,100,000

7.6 Expenditure Breakdown

Please estimate what amount or percentage of this work-related expenditure was incurred through:

Expenditure Item	N	% of artists expending in this	Mean	TOTAL	as % of all expenditure

		area			
Materials	203	96,7	20074	4075016	28,89
Work premises	99	47,1	17884	1770518	12,55
Equipment	117	55,7	12495	1461911	10,36
Labour (assistant/s)	49	23,3	46607	2283723	16,19
Framing	72	34,3	9385	675685	4,79
Exhibition costs	92	43,8	10325	949926	6,73
Documentation of Work	46	21,9	3344.5	153846	1,09
Research costs	54	25,7	6175	333448	2,36
Travel costs (work-related)	110	52,4	8866	975267	6,91
Training/Professional Development	25	11,9	5786	144650	1,03
Promotion/publicity costs	37	17,6	9686	358390	2,54
Transport and Freightng	58	27,6	10453	606296	4,30
Insurance	30	14,3	5582.1	167462	1,19
Other (specify)	16	7,6	9402.6	150442	1,07
TOTAL				14106580	100

7.7 Replacement Value of Assets

What is the estimated replacement value of your work-related assets/things that you require to conduct your work?

Asset replacement	Amateur
N	227
mean	169,771
p25	18,000
p50	50,000
min	200
max	3,000,000

Asset replacement	Black	White
N	96	129
mean	52,391	256,656
p25	8,000	30,000
p50	20,000	100,000
min	200	4,000
max	500,000	3,000,000

Asset replacement	M	F
N	117	110
mean	171,897	167,510
p25	15,000	20,000
p50	48,000	62,500
min	500	200
max	3,000,000	2,000,000

Asset replacement by Province (Professionals only)	N	mean	p25	p50	min	max

Gauteng	64	175,641	20,000	50,000	1,500	2,000,000
Western Cape	51	207,726	30,000	100,000	10,000	3,000,000
Kwazulu Natal	43	167,330	10,000	30,000	500	2,000,000
Free State & EC	32	185,050	14,500	40,000	1,000	2,000,000
Other provinces	37	96,926	9,950	23,000	200	1,000,000
TOTAL	227	169,771	18,000	50,000	200	3,000,000

7.8 Debts/Liabilities

What is the estimated size of your debts/liabilities?

Debt	Amateur
N	227
mean	83,998
min	20
max	2,000,000

Debt	Black	White
N	96	129
mean	27,013	124,837
min	20	2,000
max	600,000	2,000,000

Debt	M	F
N	117	110
mean	58,357	111,271
min	20	260
max	900,000	2,000,000

Debt by Province (Professionals only)	N	mean	min	max
Gauteng	64	93,744	260	2,000,000
Western Cape	51	100,980	2,000	1,600,000
Kwazulu Natal	43	87,070	20	1,000,000
Free State & EC	32	56,785	2,000	350,000
Other provinces	37	63,697	4,000	1,000,000
TOTAL	227	83,998	20	2,000,000

7.9 Income Tax Registration

Are you registered for income or company tax?

	N	%
No	100	41
Yes	145	59
TOTAL	245	100

N (professionals Only)	No	Yes	TOTAL

Gauteng	23	43	66
Western Cape	20	38	58
Kwazulu Natal	21	26	47
Free State & EC	11	23	34
Other provinces	25	15	40
TOTAL	100	145	245

(% (professionals Only)	No	Yes
Gauteng	35	65
Western Cape	34	66
Kwazulu Natal	45	55
Free State & EC	32	68
Other provinces	63	38
TOTAL	41	59

7.10 Reasons for Not Being Registered for Income Tax

If NO, why: (choose ONE)

	N	%
Not aware	9	9
I think I earn too little	47	48
Haven't found the time	9	9
Fall below current income/company tax threshold	29	30
Too much trouble/admin	1	1
Other, specify:	1	1
TOTAL	97	100

N (professionals Only)	Not aware	I think I earn too little	Haven't found the time	Fall below current income/company tax threshold	Too much trouble/admin in	Other purpose,	TOTAL
Gauteng	2	9	2	10	0	0	23
Western Cape	2	11	3	3	1	1	21
Kwazulu Natal	2	12	2	4	0	0	20
Free State & EC	3	4	1	2	0	0	10
Other provinces	0	11	1	10	0	0	23
TOTAL	9	47	9	29	1	1	97

% (professionals Only)	Not aware	I think I earn too little	Haven't found the time	Fall below current income/company tax threshold	Too much trouble/admin	Other purpose,
Gauteng	9	39	9	43	0	0
Western Cape	10	52	14	14	5	5
Kwazulu Natal	10	60	10	20	0	0
Free State & EC	30	40	10	20	0	0
Other provinces	0	48	4	43	0	0
TOTAL	9	48	9	30	1	1

Other include nationality

7.11 VAT registration

Are you registered as a VAT vendor through SARS?

	N	%
No	224	91
Yes	21	9
TOTAL	245	100

N (professionals Only)	No	Yes	TOTAL
Gauteng	60	6	66
Western Cape	52	6	58
Kwazulu Natal	43	4	47
Free State & EC	32	2	34
Other provinces	37	3	40
TOTAL	224	21	245

(% (professionals Only)	No	Yes
Gauteng	91	9
Western Cape	90	10
Kwazulu Natal	91	9
Free State & EC	94	6
Other provinces	93	8
TOTAL	91	9

7.12 Reasons for Not Being Registered as a VAT vendor

If NO, why

	N	%
Don't know how VAT applies to my practice	33	15
Not applicable to my legal status	69	31
Fall below current taxable income threshold	114	52
Too much trouble/admin	4	2
TOTAL	220	100

N (professionals Only)	Don't know how VAT	Not applicable	Fall below current taxable income threshold	Too much trouble/admin	TOTAL
Gauteng	13	12	33	1	59
Western Cape	5	18	28	0	51
Kwazulu Natal	3	21	18	0	42
Free State & EC	8	10	11	3	32
Other provinces	4	8	24	0	36
TOTAL	33	69	114	4	220

% (professionals Only)	Don't know how VAT	Not applicable	Fall below current taxable income threshold	Too much trouble/admin
Gauteng	22	20	56	2
Western Cape	10	35	55	0

Kwazulu Natal	7	50	43	0
Free State & EC	25	31	34	9
Other provinces	11	22	67	0
TOTAL	15	31	52	2

Appendix B: Business/Organisation Survey Data

1. Basic Details and Overview

1.1 Location

	N	%
Gauteng	33	46
Western Cape	17	24
Kwazulu Natal	6	8
Mpumalanga	4	6
Eastern Cape	3	4
Free State	3	4
North West	3	4
Limpopo	1	1
Northern Cape	1	1
TOTAL	71	100

1.2 Age of Business Owner/Top Manager

N	65
mean	47
p25	37
p50	44
min	24
max	78

	N	mean	p25	p50	min	max
Education, training and development	15	46	36	44	27	71
Materials and Technical Services	15	45	35	40	29	72
Distribution/presentation - primary market	30	48	41	48	28	74
Distribution/presentation - secondary market	3	68	61	66	61	78
Reception	2	34	24	34	24	44
TOTAL	65	47	37	44	24	78

1.3 Gender: Business Owner/Top Manager

	N	%
Female	33	47
Male	37	53
TOTAL	70	100

	Male	Female	Male %	Female %
Education, training and development	7	10	41	59
Materials and Technical Services	5	10	33	67
Distribution/presentation - primary market	20	12	63	38
Distribution/presentation - secondary market	3	0	100	0

Reception	2	1	67	33
TOTAL	37	33	53	47

1.4 Race: Business Owner/Top Manager

	N	%
Black	6	9
Coloured	1	1
Indian_Asian	1	1
White	62	89
TOTAL	70	100

N	Black	White	Indian_Asian	Coloured
Education, training and development	3	13	1	0
Materials and Technical Services	0	14	0	1
Distribution/presentation - primary market	3	29	0	0
Distribution/presentation - secondary market	0	3	0	0
Reception	0	3	0	0
TOTAL	6	62	1	1

%	B %	W %	I %	C %
Education, training and development	18	76	6	0
Materials and Technical Services	0	93	0	7
Distribution/presentation - primary market	9	91	0	0
Distribution/presentation - secondary market	0	100	0	0
Reception	0	100	0	0
TOTAL	9	89	1	1

1.5 Home Language: Business Owner/Top Manager

Language	N	%
Afrikaans	17	25
English	44	65
IsiXhosa	0	0
IsiZulu	1	1
Sesotho	1	1
Sepedi	1	1
Setswana	1	1
Other	3	4
TOTAL	68	100

1.6 Nationality: Business Owner/Top Manager

	N	%
South African	66	96
Scottish	1	1
Dutch	1	1
French	1	1

TOTAL	69	100

1.7 Survey Follow Up

Do you want to receive follow up information about this research project? (reports on findings etc)

	N	%
No	4	6
Yes	67	94
TOTAL	71	100

1.8 Type of Business/Organisation

Which of the following best describes your organisation/business? (choose ONE)

	N	%
gallery - commercial/private	25	35
arts development organization (non-profit)	9	13
arts consultant/consultancy	8	11
artists/arts association	6	8
artist-run gallery/project space	6	8
art publisher	2	3
education and training provider – private	2	3
materials supplier	2	3
technical services provider	2	3
art collection/collector - corporate/private	1	1
art restorer/conservator	1	1
Auctioneer	1	1
community arts centre	1	1
Dealer	1	1
framer/framing supplier	1	1
arts media specialist/publicist	1	1
materials manufacturer	1	1
on-line artist portfolio or gallery	1	1
art journalist/critic	0	0
TOTAL	71	100

The above business/organisational types were then organised into value chain components, in order to be able to disaggregate a range of information by value chain component:

N	N	%
Education, training and development	18	25
Materials and Technical Services	15	21
Distribution/presentation - primary market	32	45
Distribution/presentation - secondary market	3	4
Reception	3	4
TOTAL	71	100

1.9 Primary Activities

Which of the following areas of activity are you/your business/organisation involved in within the visual arts sector (multiple response)

	N	%
Selling artwork	50	70
Curating exhibitions/projects	42	59
Education and training services	38	54
Managing/promoting artists	38	54
Support services to artists	33	46
Designing/installing artworks/exhibitions	29	41
Production/project management, incl commissioning services	24	34
Producing artwork	23	32
Marketing and publicity services	22	31
Research	21	30
Framing services	11	15
Art publishing, incl writing, editorial services, design	11	15
Art media, incl writing, editorial services, design	11	15
Art materials supplier	5	7
Conservation/restoration services	5	7
Materials manufacture	3	4
Materials retail	1	1
Other	1	1
TOTAL	370	

Other include art therapy, provider of insurance solutions

N	Education	Materials	Prim mkt	Sec mkt	Reception
Selling artwork	12	6	28	3	1
Curating exhibitions/projects	12	7	21	1	1
Education and training services	16	7	14	1	0
Managing/promoting artists	11	3	21	1	2
Support services to artists	11	6	14	0	2
Designing/installing artworks/exhibitions	8	6	14	0	1
Production/project management, incl commissioning services	6	5	10	1	2
Producing artwork	8	4	10	0	1
Marketing and publicity services	4	2	13	1	2
Research	10	4	6	1	0
Framing services	1	1	8	0	1
Art publishing, incl writing, editorial services, design	4	1	4	0	2
Art media, incl writing, editorial services, design	4	2	3	0	2
Art materials supplier	1	2	1	0	1
Conservation/restoration services	0	2	2	1	0
Materials manufacture	0	2	1	0	0
Materials retail	0	1	0	0	0
Other	0	1	0	0	0
TOTAL	108	62	170	10	18

%	Education	Materials	Prim mkt	Sec mkt	Reception

Selling artwork	67	40	88	100	33
Curating exhibitions/projects	67	47	66	33	33
Education and training services	89	47	44	33	0
Managing/promoting artists	61	20	66	33	67
Support services to artists	61	40	44	0	67
Designing/installing artworks/exhibitions	44	40	44	0	33
Production/project management, incl commissioning services	33	33	31	33	67
Producing artwork	44	27	31	0	33
Marketing and publicity services	22	13	41	33	67
Research	56	27	19	33	0
Framing services	6	7	25	0	33
Art publishing, incl writing, editorial services, design	22	7	13	0	67
Art media, incl writing, editorial services, design	22	13	9	0	67
Art materials supplier	6	13	3	0	33
Conservation/restoration services	0	13	6	33	0
Materials manufacture	0	13	3	0	0
Materials retail	0	7	0	0	0
Other	0	7	0	0	0

1.10 Market Segment

Which area/s of visual arts practice do you primarily deal with in the course of the above activities? (you can choose more than one)

	N	%
Contemporary, etc..	44	62
Traditional artworks	39	55
Public art	22	31
Community arts	19	27
Craft art/fine craft	18	25
Other	7	10
TOTAL	149	

N	Education	Materials	Prim mkt	Sec mkt	Reception
Contemporary, etc..	10	7	22	2	3
Traditional artworks	9	6	19	3	2
Public art	6	8	8	0	0
Community arts	10	5	4	0	0
Craft art/fine craft	7	7	3	0	1
Other	5	1	1	0	0
TOTAL	47	34	57	5	6

%	Education	Materials	Prim mkt	Sec mkt	Reception
Contemporary, etc..	56	47	69	67	100
Traditional artworks	50	40	59	100	67
Public art	33	53	25	0	0
Community arts	56	33	13	0	0

Craft art/fine craft	39	47	9	0	33
Other	28	7	3	0	0

Other include selling old masters art, arts competitions

1.11 Premises

Where do you/your business/organisation operate from?

	N	%
Home workshop, studio or office (rented)	7	10
Home workshop, studio or office (owned)	14	20
Studio away from home (rented)	30	42
Studio away from home (owned)	14	20
Currently have no work premises	1	1
Other (specify)	5	7
TOTAL	71	100

N	Education	Materials	Prim mkt	Sec mkt	Reception
Home workshop, studio or office (rented)	1	3	3	0	0
Home workshop, studio or office (owned)	1	6	6	1	0
Studio away from home (rented)	9	4	14	2	1
Studio away from home (owned)	2	1	9	0	2
Currently have no work premises	0	1	0	0	0
Other (specify)	5	0	0	0	0
TOTAL	18	15	32	3	3

%	Education	Materials	Prim mkt	Sec mkt	Reception
Home workshop, studio or office (rented)	6	20	9	0	0
Home workshop, studio or office (owned)	6	40	19	33	0
Studio away from home (rented)	50	27	44	67	33
Studio away from home (owned)	11	7	28	0	67
Currently have no work premises	0	7	0	0	0
Other (specify)	0	7	0	0	0

2. Legal Structure and Governance

2.1 Legal Status

Please indicate whether you/your business or organisation is constituted as a:

	N	%
Freelance/independent contractor/self-employed	4	6
Sole trader	7	10
Partnership	1	1
Co-operative	1	1

Closed Corporation (cc)	30	42
PTY Ltd	9	13
Voluntary Association	5	7
Section 21 company	8	11
Trust	6	8
TOTAL	71	100

N	Education	Materials	Prim mkt	Sec mkt	Reception
Freelance/independent contractor/self-employed	0	1	2	1	0
Sole trader	0	2	4	0	1
Partnership	0	0	1	0	0
Co-operative	0	0	1	0	0
Closed Corporation (cc)	1	11	15	1	2
PTY Ltd	2	1	5	1	0
Voluntary Association	5	0	0	0	0
Section 21 company	8	0	0	0	0
Trust	2	0	4	0	0
TOTAL	18	15	32	3	3

%	Education	Materials	Prim mkt	Sec mkt	Reception
Freelance/independent contractor/self-employed	0	7	6	33	0
Sole trader	0	13	13	0	33
Partnership	0	0	3	0	0
Co-operative	0	0	3	0	0
Closed Corporation (cc)	6	73	47	33	67
PTY Ltd	11	7	16	33	0
Voluntary Association	28	0	0	0	0
Section 21 company	44	0	0	0	0
Trust	11	0	13	0	0

2.2 How long have you traded/operated in this form?

	N	%
0 to 5 year	27	39
6 to 10 year	24	34
11 to 20 year	12	17
> 20 years	7	10
TOTAL	70	100

N	0 to 5 year	6 to 10 year	11 to 20 year	> 20 years
Education, training and development	4	5	4	5
Materials and Technical Services	4	6	4	0
Distribution/presentation - primary market	16	10	4	2
Distribution/presentation - secondary market	2	1	0	0
Reception	1	2	0	0
TOTAL	27	24	12	7

N	0 to 5 year	6 to 10 year	11 to 20 year	> 20 years
Education, training and development	22	28	22	28
Materials and Technical Services	29	43	29	0

Distribution/presentation - primary market	50	31	13	6
Distribution/presentation - secondary market	67	33	0	0
Reception	33	67	0	0
TOTAL	39	34	17	10

2.3 NPO registration

If you are a section 21, voluntary association or a Trust, are you registered as a non-profit organisation? (if NO, goto 2.5)

NPO	N	%
No	4	21
Yes	15	79
TOTAL	19	100

2.4 Board Demographics (non-profit organizations)

If you are a section 21, voluntary association or a Trust, could you indicate the demographics of your Board of Directors/Trustees?

N	Female	Male	Under 35	Over 35
Black	15	15	6	16
Coloured	1	7	0	7
Indian_Asian	0	6	0	6
White	34	29	4	42
TOTAL	50	57	10	71

2.5 Ownership/shareholding demographics (for-profit organizations)

If you are a business entity (self-employed, sole trader, independent contractors, cc, PTY (Ltd), could you indicate the demographic profile of the principal/majority owners of your business?

N	Female	Male	Under 35	Over 35
Black	3	4	4	10
Coloured	7	0	4	3
Indian_Asian	0	0	0	0
White	36	40	14	52
TOTAL	46	44	22	65

2.5 Governance Meetings (frequency)

If you have either a Board of Trustees, Board of Directors or similar governance structure, please indicate how often this board meets:

	N	%
Once a year	2	8
Twice a year	4	15

Quarterly	9	35
Monthly	8	31
Other	3	12
TOTAL	26	100

Other included weekly

3. Staffing

3.1 Number of Organisations that are Employers

Do you employ anyone on either a part-time, full-time or occasional basis to assist you with any aspect of your work?

	N	%
No	9	13
Yes	62	87
TOTAL	71	100

	No	Yes	No %	Yes %
Education, training and development	1	17	6	94
Materials and Technical Services	4	11	27	73
Distribution/presentation - primary market	4	28	13	88
Distribution/presentation - secondary market	0	3	0	100
Reception	0	3	0	100
TOTAL	9	62	13	87

3.2 Staff numbers

3.2.1 Senior Management

How many people does your business/organisation employ in senior management positions?

	N	AVG	TOTAL	Population
Full time	71	1.070	76	1071
Part-time	71	0.282	20	282
Short term contract	71	0.056	4	56

3.2.2 Middle Management

How many people does your business/organisation employ in specialist middle management positions?

	N	AVG	TOTAL	Population
Full time	71	0.577	41	578
Part-time	71	0.423	30	423
Short term contract	71	0.070	5	70

3.2.3 Specialist/Technical Staff

How many people does your business/organisation employ in specialist technical positions?

	N	AVG	TOTAL	Population
Full time	71	0.761	54	762
Part-time	71	0.972	69	973
Short term contract	71	1.268	90	1269

3.2.4 Ancillary/Support Staff

How many people does your business/organisation employ in ancillary and support positions?

	N	AVG	TOTAL	Population
Full time	71	0.831	59	832
Part-time	71	0.958	68	959
Short term contract	71	0.211	15	211

3.2.5 Volunteers

Number of volunteers that work for your organisation (if applicable)?

	N	AVG	TOTAL	Population
Volunteers	71	1.521	108	1523

3.3 Staff Profile

3.3.1 Demographics

Please complete the following demographic table to the best of your ability, indicating the number of staff members in each category:

Total	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female
Senior Management	11	5	3	1	1	0	33	41
Middle Management	11	15	0	2	1	0	8	27
Specialist Technical	49	31	6	2	0	6	18	40
Ancillary and Support	53	50	3	12	0	0	2	9
Volunteers	41	33	0	5	1	1	8	15
TOTAL	165	134	12	22	3	7	69	132

AVG	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female
Senior Management	0.155	0.070	0.042	0.014	0.014	0.000	0.465	0.577
Middle Management	0.155	0.211	0.000	0.028	0.014	0.000	0.113	0.380
Specialist Technical	0.690	0.437	0.085	0.028	0.000	0.085	0.254	0.563
Ancillary and Support	0.746	0.704	0.042	0.169	0.000	0.000	0.028	0.127
Volunteers	0.577	0.465	0.000	0.070	0.014	0.014	0.113	0.211

Population	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female
Senior Management	155	70	42	14	14	0	465	578
Middle Management	155	211	0	28	14	0	113	381
Specialist Technical	691	437	85	28	0	85	254	564
Ancillary and Support	747	705	42	169	0	0	28	127
Volunteers	578	465	0	70	14	14	113	211

3.3.2 Overall numbers of employees by Organisation

Employment category	N	%
1 to 5	33	65
6-10	11	22
11 -20	5	10
20-50	2	4
> 50	0	0

3.3.3 Age and Disability

Please indicate numbers of staff by age and disability:

Total	Disabled Male	Disabled Female	younger than 36	36+
Senior Management	0	1	14	57
Middle Management	0	0	33	30
Specialist Technical	0	0	87	50
Ancillary and Support	1	0	64	49
Volunteers	1	0	88	25
TOTAL	2	1	286	211

%	Disabled Male	Disabled Female

Senior Management	0.000	0.021
Middle Management	0.000	0.000
Specialist Technical	0.000	0.000
Ancillary and Support	0.017	0.000
Volunteers	0.020	0.000

%	younger than 36	36+
Senior Management	20	80
Middle Management	52	48
Specialist Technical	64	36
Ancillary and Support	57	43
Volunteers	78	22
TOTAL	58	42

AVG	Disabled Male	Disabled Female	younger than 36	36+
Senior Management	0.000	0.014	0.197	0.803
Middle Management	0.000	0.000	0.465	0.423
Specialist Technical	0.000	0.000	1.225	0.704
Ancillary and Support	0.014	0.000	0.901	0.690
Volunteers	0.014	0.000	1.239	0.352

3.3.4 Education Levels of Employees

Indicate or estimate how many people you employ fall into each of the following categories?

	Total	%	AVG
Tertiary education graduates (postgraduate)	83	19	1.317
Tertiary education graduates (undergraduate)	127	29	1.984
High school/college graduates?	161	36	2.477
Primary school graduates?	32	7	.525
Informally trained/no formal education?	40	9	.656
TOTAL	443		

3.3.5 Level of Education of Business-Owner/Top Manager

What is the highest level of education of the top manager or principal owner of your organisation?

	N	%
No formal education	0	0
Up to Grade 9	0	0
Up to Grade 12	5	8
Vocational training with Grade 9	0	0
Vocational training with Grade 12	1	2
Diploma with Grade 9	2	3
Diploma with Grade 12	5	8

Completed a university degree	24	38
Completed a post-graduate degree	25	40
Other (specify)	1	2
TOTAL	63	100

3.4 Staff Benefits

3.4.1 Employee Benefits

Are you/your business able to provide employees with any benefits? If yes, indicate which of the following:

	N	%	Multiple % (71)
Pension Fund	4	7	6
Provident Fund	1	2	1
Retirement Annuity	24	39	34
Investment in stocks	4	7	6
Savings	1	2	1
None of the above	27	44	38
TOTAL	61	100	

3.4.2 Reasons for Non-Provision of Employee Benefits

If not, indicate which of the following most accurately describes why this is the case:

	N	%
Too costly	19	51
Own decisions	16	43
Not aware	2	5
TOTAL	37	100

4. Funding

4.1 Number of Businesses/Organisation Applied for Funding

During the last three years have you APPLIED FOR funding from a governmental or private source?

	N	%
No	35	49
Yes	36	51
TOTAL	71	100

	No	Yes	No %	Yes %
Education, training and development	4	14	22	78
Materials and Technical Services	7	8	47	53
Distribution/presentation - primary market	20	12	63	38
Distribution/presentation - secondary market	2	1	67	33
Reception	2	1	67	33
TOTAL	35	36	49	51

4.2 Reasons for Not Applying for Funding

If NO, what was the MAIN reason for not applying for funding? (choose ONE and then go to 4.6.1)

	N	%
No experience in writing proposals	3	9
My writing skills are poor	0	0
It is pointless, I would fail to get it	6	18
the available grants are inadequate for my needs	1	3
It depends on whom you know	0	0
Admin compliance requirements of funders	2	6
Do not need funding for my work	17	52
Other (specify)	4	12
TOTAL	33	100

Others include never considered, still looking for the best possible sponsors to approach for our specific needs and high interest rates

4.3 Funders Applied to

If YES, which of the following have you applied to?:

	N	% (71)	% (36)
National Arts Council	19	27	53
National Lottery	12	17	33
Department of Arts and Culture	16	23	44
Provincial government	13	18	36
Local government	7	10	19
Business Arts South Africa	15	21	42
Arts and Culture Trust	11	15	31
International Arts Funding Body	18	25	50
Private Foundation	9	13	25
Corporate sponsorship	15	21	42
Corporate funding	6	8	17
Patron	6	8	17
Arts organisation	4	6	11
TOTAL	151		

4.4 Success Rates of Funding Applications, by Funder

Did you receive funding from any of these sources?

	N	Success % (71)	% (4.3)
National Arts Council	10	14	53
National Lottery	7	10	58
Department of Arts and Culture	9	13	56
Provincial government	9	13	69
Local government	3	4	43
Business Arts South Africa	7	10	47
Arts and Culture Trust	3	4	27

International Arts Funding Body	15	21	83
Private Foundation	5	7	56
Corporate sponsorship	10	14	67
Corporate funding	4	6	67
Patron	5	7	83
Arts organisation	2	3	50
Did not receive any funding	5	7	
TOTAL	94		

4.5 Funders Regarded as Being Most Responsive to Needs of Visual Arts Sector

Of those funding sources that you have applied to, which do you regard as being the most responsive to the needs of the visual arts sector? (choose ONE)

	N	%
National Arts Council	6	17
National Lottery	2	6
National Government	2	6
Provincial Government	1	3
Local Government	1	3
Business Arts South Africa	2	6
Arts and Culture Trust	1	3
International Funding Body	13	37
Private Foundation	1	3
Corporate sponsorship	5	14
Corporate funding	0	0
Patron	0	0
Arts organisation	0	0
TOTAL	35	100

4.6 Views on Most Important Purposes for Arts Funding

What do you regard as the MOST important purpose for arts funding in general? (choose ONE)

	N	%
Supporting artists to	28	41
Promoting capacity-bu	8	11
Building new audience	2	3
Developing new market	8	11
Enabling internation	7	10
Developing new talent	3	4
Broadening access to	10	14
Subsidizing innovativ	2	3
Research	1	1
TOTAL	70	100

What do you regard as the SECOND MOST important purpose for arts funding in general? (choose ONE)

	N	%
Supporting artists to	11	16
Promoting capacity-bu	14	20

Building new audience	9	13
Developing new market	10	14
Enabling internation	4	6
Developing new talent	11	16
Broadening access to	7	10
Subsidizing innovativ	1	1
Research	2	3
TOTAL	69	100

4.7 No of Businesses/Organisations Applying for Loan Finance

Have you applied for loan finance from a bank during the course of the last three years?

	N	%
No	56	79
Yes	15	21
TOTAL	71	100

4.8 Reasons for Not Applying for Loan Finance

If NO, what was the reason for not applying?

	N	%
No need for loan finance	36	69
No experience in dealing with banks	1	2
It is pointless, I would fail to get it	0	0
It depends on whom you know	0	0
Admin compliance requirements of banks	3	6
Other (specify)	12	23
TOTAL	52	100

Others include debt avoidance, financed by shareholders, can't afford, overdraft facility, costs incurred would be too high for sustained small business growth, constitutional decision

4.9 Success Rates of Finance Applications

If YES, was your application successful?

	N	%
No	2	
Yes	13	87
TOTAL	15	

Loan Finance from Informal Sources

During the course of the last three years, have you obtained a loan from an informal source such a money-lender, friend or relative?

	N	%
No	57	80

Yes	14	20
TOTAL	71	100

5. Business Position and Market-related Issues

5.1 Extent to Which Business and Organisations Have to Supplement Visual Arts Related Work with Work Outside the Sector

Do you have to spend time engaged in work/business outside of the visual arts to sustain your work in the visual arts?

	N	%
No	38	54
Yes	33	46
TOTAL	71	100

N	No	Yes
Education, training and development	14	4
Materials and Technical Services	4	11
Distribution/presentation - primary market	19	13
Distribution/presentation - secondary market	1	2
Reception	1	3
TOTAL	38	33

%	No	Yes
Education, training and development	78	22
Materials and Technical Services	27	73
Distribution/presentation - primary market	59	41
Distribution/presentation - secondary market	33	67
Reception	25	75
TOTAL	54	46

5.2 Reasons for Involvement in Supplementary Activities

If YES, why are you involved in other activities to support your "creative" activity (choose one or more)?

	N	%
Subsidise Visual Arts work	15	21
Market is too small	12	17
Risk reduction	9	13
Expansion	12	17
Other	4	6
TOTAL	52	

N	Subsidise	Market is too small	Risk reduction	Expansion	Other
Education, training and development	4	1	0	0	0
Materials and Technical Services	4	3	4	4	3
Distribution/presentation - primary market	6	7	5	4	1

Distribution/presentation - secondary market	0	0	0	2	0
Reception	1	1	0	2	0
TOTAL	15	12	9	12	4

%	Subsidise	Market is too small	Risk reduction	Expansion	Other
Education, training and development	22	6	0	0	0
Materials and Technical Services	27	20	27	27	20
Distribution/presentation - primary market	19	22	16	13	3
Distribution/presentation - secondary market	0	0	0	67	0
Reception	33	33	0	67	0

Other include network and make ends meet

5.3 Nature of Location

How would you describe where you live and work? (choose ONE)

	N	%
Urban – Major City - Suburban/CBD	54	77
Urban – Major Ciy - Township	1	1
Urban - town	5	7
Semi rural, small town	8	11
Deep rural/remote	2	3
TOTAL	70	100

N	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remote
Education, training and development	14	0	1	1	1
Materials and Technical Services	11	0	2	1	1
Distribution/presentation - primary market	24	1	1	6	0
Distribution/presentation - secondary market	2	0	1	0	0
Reception	3	0	0	0	0
TOTAL	54	1	5	8	2

%	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remote
Education, training and development	82	0	6	6	6
Materials and Technical Services	73	0	13	7	7
Distribution/presentation - primary market	75	3	3	19	0
Distribution/presentation - secondary market	67	0	33	0	0
Reception	100	0	0	0	0
TOTAL	77	1	7	11	3

5.4 Impact of Location on Market Access

How does your current location impact on your market access/ability to sell your work?

	N	%
Positively	54	77
Negatively	9	13
Does not affect it at all	7	10
TOTAL	70	100

N	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remot e
Positively	44	1	3	5	1
Negatively	4	0	2	2	1
Does not affect it at all	6	0	0	1	0
TOTAL	54	1	5	8	2

%	Urban – Major City - Suburban/CBD	Urban – Major Ciy - Township	Urban - town	Semi rural, small town	Deep rural/remot e	Total
Positively	81	100	60	63	50	77
Negatively	7	0	40	25	50	13
Does not affect it at all	11	0	0	13	0	10

5.5 Nature of Market for Products and Services

Are your products or services sold or delivered primarily.... (choose ONE)

	N	%
Directly to consumers/users?	47	67
To other businesses/organisations?	3	4
Both equally	20	29
TOTAL	70	100

N	Directly	To other businesses	Both equally
Education, training and development	13	0	4
Materials and Technical Services	6	2	7
Distribution/presentation - primary market	24	0	8
Distribution/presentation - secondary market	3	0	0
Reception	1	1	1
TOTAL	67	4	29

%	Directly	To other businesses	Both equally
Education, training and development	76	0	24
Materials and Technical Services	40	13	47
Distribution/presentation - primary market	75	0	25
Distribution/presentation - secondary market	100	0	0
Reception	33	33	33
TOTAL	70	0	30

5.6 Most Financially Significant Markets (Geographical Reach)

At the moment, the MOST financially significant market for your work is...

	N	%
Local?	29	41
Regional?	7	10
National?	23	33
Continental/African?	2	3
International?	9	13
TOTAL	70	100

N	Local?	Regional?	National?	Continental/African?	International?
Education, training and development	9	3	2	1	2
Materials and Technical Services	6	2	7	0	0
Distribution/presentation - primary market	14	1	9	1	7
Distribution/presentation - secondary market	0	0	3	0	0
Reception	0	1	2	0	0
TOTAL	29	7	23	2	9

%	Local?	Regional?	National?	Continental/African?	International?
Education, training and development	53	18	12	6	12
Materials and Technical Services	40	13	47	0	0
Distribution/presentation - primary market	44	3	28	3	22
Distribution/presentation - secondary market	0	0	100	0	0
Reception	0	33	67	0	0
TOTAL	41	10	33	3	13

At the moment, the SECOND MOST financially significant market for your work is...

	N	%
Local?	13	19
Regional?	15	21
National?	14	20
Continental/African?	4	6
International?	24	34
TOTAL	70	100

N	Local?	Regional?	National?	Continental/African?	International?
Education, training and development	2	5	3	2	5
Materials and Technical Services	5	2	2	2	4
Distribution/presentation - primary market	5	6	8	0	13
Distribution/presentation - secondary market	1	0	0	0	2
Reception	0	2	1	0	0
TOTAL	13	15	14	4	24

%	Local?	Regional?	National?	Continental/African?	International?

Education, training and development	12	29	18	12	29
Materials and Technical Services	33	13	13	13	27
Distribution/presentation - primary market	16	19	25	0	41
Distribution/presentation - secondary market	33	0	0	0	67
Reception	0	67	33	0	0
TOTAL	19	21	20	6	34

5.7 Extent to Which Tourists Are Significant Target Market

Do tourists form a significant part of your target market/buyers of your work?

	N	%
No	41	58
Yes	30	42
TOTAL	71	100

N	No	Yes
Education, training and development	10	8
Materials and Technical Services	10	5
Distribution/presentation - primary market	15	17
Distribution/presentation - secondary market	3	0
Reception	3	0
TOTAL	41	30

%	No	Yes
Education, training and development	56	44
Materials and Technical Services	67	33
Distribution/presentation - primary market	47	53
Distribution/presentation - secondary market	100	0
Reception	100	0
TOTAL	58	42

5.8 Methods of Marketing Products and Services

Please indicate which of the following which is the MOST important method of marketing/promoting your products/services?

	N	%
The physical position	13	19
Networks	37	53
On-line presence	15	21
Local media	2	3
National media	2	3
Other	1	1
TOTAL	70	100

N	Education	Materials	Prim mkt	Sec mkt	Reception	TOTAL
The physical position	4	1	7	1	0	13
Networks	7	12	16	0	2	37

On-line presence	5	1	7	1	1	15
Local media	1	0	1	0	0	2
National media	0	0	1	1	0	2
Other	0	1	0	0	0	1

%	Education	Materials	Prim mkt	Sec mkt	Reception	TOTAL
The physical position	24	7	22	33	0	19
Networks	41	80	50	0	67	53
On-line presence	29	7	22	33	33	21
Local media	6	0	3	0	0	3
National media	0	0	3	33	0	3
Other	0	7	0	0	0	1

Please indicate which of the following which is the SECOND MOST important method of marketing/promoting your products/services?

	N	%
The physical position	12	18
Networks	18	26
On-line presence	26	38
Local media	7	10
National media	3	4
International media	1	1
Other	1	1
TOTAL	68	100

N	Education	Materials	Prim mkt	Sec mkt	Reception	Total
The physical position	2	3	5	0	2	12
Networks	7	4	6	1	0	18
On-line presence	5	3	16	1	1	26
Local media	1	1	4	1	0	7
National media	2	1	0	0	0	3
International media	0	0	1	0	0	1
Other	0	1	0	0	0	1

%	Education	Materials	Prim mkt	Sec mkt	Reception	Total
The physical position	12	23	16	0	67	18
Networks	41	31	19	33	0	26
On-line presence	29	23	50	33	33	38
Local media	6	8	13	33	0	10
National media	12	8	0	0	0	4
International media	0	0	3	0	0	1
Other	0	8	0	0	0	1

5.9 Perception of Market for Products/Services

How would you characterise the market for the products and services that you/your business provides?

	N	%
Healthy, growing	21	30

Gradual improvement	31	44
Stagnant	12	17
In decline	5	7
In sharp decline	1	1
TOTAL	70	100

N	Healthy	Gradual improve	Stagnant	Decline	Sharp decline
Education, training and development	6	5	6	0	0
Materials and Technical Services	5	4	3	3	0
Distribution/presentation - primary market	8	18	3	2	1
Distribution/presentation - secondary market	1	2	0	0	0
Reception	1	2	0	0	0
TOTAL	21	31	12	3	1

%	Healthy	Gradual improve	Stagnant	Decline	Sharp decline
Education, training and development	35	29	35	0	0
Materials and Technical Services	33	27	20	20	0
Distribution/presentation - primary market	25	56	9	6	3
Distribution/presentation - secondary market	33	67	0	0	0
Reception	33	67	0	0	0
TOTAL	31	46	18	4	1

5.10 Perception of Most Critical Obstacles to Development of Business/Organisation

Which of the following issues represent critical obstacles to the development of your work/business/organisation? Rank them as follows: 1 = major; 2 = moderate; 3 = minor; 4 = not significant

[first table shows average of all ranked responses; second table shows number of responses in each ranking for each issue]

	AVG
The high cost of...	2.2
Materials and Supplies	2.0
Space/Business premises	2.0
Utilities (electricity, etc)	2.4
Telecommunication	1.9
Publicity	2.1
Publishing	2.2
Transport/freighting	2.3
Legal advice	2.4
Labour	2.1
Market Conditions	2.2
Weaknesses in Supply of Product	2.2
Weaknesses in Demand for Product	2.0
Level of competition in the industry	2.3
Exchange rate	2.5
Tax rate	2.2
Interest Rates	2.2
Changing trends which influence demand	2.0

Lack of Access to...	2.2
Skilled labour/workforce	2.1
Finance	2.1
Funding	1.6
Raw Materials	2.6
Business support/advice	2.5
Marketing opportunities	2.3
Regulatory and industry environment	2.2
SARS compliance	2.2
Customs/trade regulations	2.2
Labour regulations	2.3
Business licensing requirements	2.3
Lack of professionalism within the industry	2.3
Lack of internal regulation within the industry	2.4
Lack of industry promotion from government	1.6
Issues related to the freedom of expression	2.4
Socio-economic conditions	2.4
Crime	2.1
Corruption	2.3
Substance Abuse	2.7
Race Discrimination	2.3
Gender Discrimination	2.4
Other (Please specify)...	0.0

%	Major	Moderate	Minor	Irrelevant	TOTAL
The high cost of....	9	35	24	32	
Materials and Supplies	16	37	18	29	100
Space/Business premises	14	35	16	35	100
Utilities (electricity, etc)	4	32	33	30	100
Telecommunication	3	39	33	25	100
Publicity	16	41	25	19	100
Publishing	7	43	26	23	100
Transport/freighting	7	30	23	39	100
Legal advice	3	20	22	55	100
Labour	12	35	19	35	100
Market Conditions	6	33	24	40	
Weaknesses in Supply of Product	3	28	25	44	100
Weaknesses in Demand for Product	21	40	22	18	100
Level of competition in the industry	5	43	28	41	100
Exchange rate	3	16	29	51	100
Tax rate	6	32	19	43	100
Interest Rates	3	37	15	46	100
Changing trends which influence demand	3	32	28	37	100
Lack of Access to...	10	33	19	38	
Skilled labour/workforce	4	37	10	49	100
Finance	10	46	19	25	100
Funding	35	35	7	22	100

Raw Materials	0	13	16	71	100
Business support/advice	4	24	35	37	100
Marketing opportunities	6	43	25	25	100
Regulatory and industry environment	8	24	16	52	
SARS compliance	9	18	18	55	100
Customs/trade regulations	12	18	21	50	100
Labour regulations	1	18	12	69	100
Business licensing requirements	3	18	13	66	100
Lack of professionalism within the industry	6	31	25	38	100
Lack of internal regulation within the industry	0	31	21	48	100
Lack of industry promotion from government	37	34	6	24	100
Issues related to the freedom of expression	0	22	15	63	100
Socio-economic conditions	4	21	18	57	
Crime	13	32	24	31	100
Corruption	3	28	21	49	100
Substance Abuse	0	12	24	65	100
Race Discrimination	3	18	12	68	100
Gender Discrimination	0	15	12	73	100
Other (Please specify)...	0	0	0	0	

COMMERCIAL	AVG
The high cost of....	2.1
Materials and Supplies	2.0
Space/Business premises	2.1
Utilities (electricity, etc)	2.5
Telecommunication	1.7
Publicity	2.1
Publishing	2.3
Transport/freighting	2.2
Legal advice	2.3
Labour	2.0
Market Conditions	2.2
Weaknesses in Supply of Product	2.2
Weaknesses in Demand for Product	2.0
Level of competition in the industry	2.2
Exchange rate	2.5
Tax rate	2.2
Interest Rates	2.2
Changing trends which influence demand	1.9
Lack of Access to...	2.2
Skilled labour/workforce	2.0
Finance	2.1
Funding	1.8
Raw Materials	2.5
Business support/advice	2.5
Marketing opportunities	2.3
Regulatory and industry environment	2.2

SARS compliance	2.2
Customs/trade regulations	2.3
Labour regulations	2.4
Business licensing requirements	2.3
Lack of professionalism within the industry	2.4
Lack of internal regulation within the industry	2.4
Lack of industry promotion from government	1.7
Issues related to the freedom of expression	2.3
Socio-economic conditions	2.4
Crime	2.2
Corruption	2.3
Substance Abuse	2.8
Race Discrimination	2.2
Gender Discrimination	2.6
Other (Please specify)...	0.0

% (COMMERCIAL)	Major	Moderate	Minor	Irrelevant	TOTAL
The high cost of....	9	37	25	28	
Materials and Supplies	18	35	20	27	100
Space/Business premises	12	40	19	29	100
Utilities (electricity, etc)	4	35	38	23	100
Telecommunication	2	46	38	13	100
Publicity	15	40	25	19	100
Publishing	8	42	27	23	100
Transport/freighting	8	35	23	35	100
Legal advice	4	23	19	54	100
Labour	13	38	15	33	100
Market Conditions	7	36	23	34	
Weaknesses in Supply of Product	4	27	25	43	100
Weaknesses in Demand for Product	22	39	25	14	100
Level of competition in the industry	4	43	20	33	100
Exchange rate	4	18	31	47	100
Tax rate	8	39	20	33	100
Interest Rates	4	43	14	39	100
Changing trends which influence demand	4	39	25	31	100
Lack of Access to...	9	33	20	38	
Skilled labour/workforce	6	41	4	49	100
Finance	14	39	24	24	100
Funding	27	35	10	27	100
Raw Materials	0	16	16	69	100
Business support/advice	4	24	37	35	100
Marketing opportunities	6	42	30	22	100
Regulatory and industry environment	8	24	17	51	
SARS compliance	10	16	18	55	100
Customs/trade regulations	8	20	25	47	100
Labour regulations	2	18	14	67	100
Business licensing requirements	4	18	14	65	100

Lack of professionalism within the industry	4	31	25	39	100
Lack of internal regulation within the industry	0	31	20	49	100
Lack of industry promotion from government	33	35	8	24	100
Issues related to the freedom of expression	0	24	10	67	100
Socio-economic conditions	4	17	19	55	
Crime	14	29	27	29	100
Corruption	4	27	22	47	100
Substance Abuse	0	8	25	67	100
Race Discrimination	3	9	6	57	100
Gender Discrimination	0	10	14	76	100
Other (Please specify)...	0	0	0	0	

5.11 Outlook

How do you generally feel about your future in the sector? (choose ONE)

	N	%
Very positive	37	54
Positive	21	30
Neutral	4	6
Negative	2	3
Very negative	2	3
Uncertain	3	4
TOTAL	69	100

N	Education	Materials	Prim mkt	Sec mkt	Reception	Total
Very positive	9	7	15	3	3	37
Positive	5	3	13	0	0	21
Neutral	1	2	1	0	0	4
Negative	1	1	0	0	0	2
Very negative	0	1	1	0	0	2
Uncertain	1	0	2	0	0	3

%	Education	Materials	Prim mkt	Sec mkt	Reception	Total
Very positive	53	50	47	100	100	54
Positive	29	21	41	0	0	30
Neutral	6	14	3	0	0	6
Negative	6	7	0	0	0	3
Very negative	0	7	3	0	0	3
Uncertain	6	0	6	0	0	4

5.12 Most Important Needs for Company Development

What do you see as your MOST important need in terms of company development? (choose ONE)

	N	%
Staff training	9	13
Help with strategy and business planning	4	6

Help with developing new ideas for cash generation	10	14
Help with improving processes and efficiency	5	7
Help with marketing	7	10
Help obtaining external commercial funding	7	10
Help obtaining external government funding	13	19
Help with international expansion	8	11
Increased web presence (marketing, distribution ...)	4	6
Other (specify)	3	4
TOTAL	70	100

Others include no help needed, supporting young artists and owning premises

N	Education	Materials	Prim mkt	Sec mkt	Reception	Total
Staff training	4	1	3	1	0	9
Help with strategy and business planning	2	0	1	1	0	4
Help with developing new ideas for cash generation	1	4	2	1	2	10
Help with improving processes and efficiency	0	2	3	0	0	5
Help with marketing	2	3	2	0	0	7
Help obtaining external commercial funding	2	2	3	0	0	7
Help obtaining external government funding	4	1	7	0	1	13
Help with international expansion	0	2	6	0	0	8
Increased web presence (marketing, distribution ...)	1	0	3	0	0	4
Other (specify)	1	0	2	0	0	3

%	Education	Materials	Prim mkt	Sec mkt	Reception	Total
Staff training	17	15	32	3	3	70
Help with strategy and business planning	24	7	9	33	0	13
Help with developing new ideas for cash generation	12	0	3	33	0	6
Help with improving processes and efficiency	6	27	6	33	67	14
Help with marketing	0	13	9	0	0	7
Help obtaining external commercial funding	12	20	6	0	0	10
Help obtaining external government funding	12	13	9	0	0	10
Help with international expansion	24	7	22	0	33	19
Increased web presence (marketing, distribution ...)	0	13	19	0	0	11
Other (specify)	6	0	9	0	0	6

What do you see as being your SECOND MOST important need in terms of company development? (choose ONE)

	N	%

Staff training	5	8
Help with strategy and business planning	10	15
Help with developing new ideas for cash generation	2	3
Help with improving processes and efficiency	4	6
Help with marketing	11	17
Help obtaining external commercial funding	12	18
Help obtaining external government funding	6	9
Help with international expansion	6	9
Increased web presence (marketing, distribution ...)	8	12
Other (specify)	2	3
TOTAL	66	100

Others include no help needed and rebuilding premises

N	Education	Materials	Prim mkt	Sec mkt	Reception	Total
Staff training	2	0	2	1	0	5
Help with strategy and business planning	3	2	5	0	0	10
Help with developing new ideas for cash generation	0	2	0	0	0	2
Help with improving processes and efficiency	1	1	0	2	0	4
Help with marketing	2	1	8	0	0	11
Help obtaining external commercial funding	6	2	4	0	0	12
Help obtaining external government funding	0	1	4	0	1	6
Help with international expansion	0	1	4	0	1	6
Increased web presence (marketing, distribution ...)	1	4	2	0	1	8
Other (specify)	1	0	1	0	0	2

%	Education	Materials	Prim mkt	Sec mkt	Reception	Total
Staff training	16	14	30	3	3	66
Help with strategy and business planning	13	0	7	33	0	8
Help with developing new ideas for cash generation	19	14	17	0	0	15
Help with improving processes and efficiency	0	14	0	0	0	3
Help with marketing	6	7	0	67	0	6
Help obtaining external commercial funding	13	7	27	0	0	17
Help obtaining external government funding	38	14	13	0	0	18
Help with international expansion	0	7	13	0	33	9
Increased web presence (marketing, distribution ...)	0	7	13	0	33	9
Other (specify)	6	29	7	0	33	12

5.13 Membership of industry organizations/associations

Are you a member of an industry organisation or association? (eg Ceramics SA, SANAVA and affiliates, VANSAs)

	N	%
No	40	56
Yes	31	44
TOTAL	71	100

N	No	Yes
Education, training and development	4	14
Materials and Technical Services	10	5
Distribution/presentation - primary market	21	11
Distribution/presentation - secondary market	2	1
Reception	3	0
TOTAL	40	31

%	No	Yes
Education, training and development	22	78
Materials and Technical Services	67	33
Distribution/presentation - primary market	66	34
Distribution/presentation - secondary market	67	33
Reception	100	0
TOTAL	56	44

5.14 Reasons for Not Being a Member

If NO, which of the following most accurately describes the reasons for not being a member? (can choose one)

	N	%
Not aware	4	11
Not interested	19	50
Don't believe any real benefits	8	21
Don't know what the benefits are	7	18
TOTAL	38	100

5.15 Perception of Most Significant Benefits Obtained from Association/Organisation Membership

If YES, what do you see as being the MOST significant benefit you obtain from this membership (choose ONE)

	N	%
Information	8	22
Advice	2	5
Networking	18	49
Marketing Opportunities	5	14
Training/Professional Development	0	0
Access to funding opportunities	1	3

Peer Support	2	5
Other, specify	1	3
TOTAL	37	100

5.16 Use of Computers

6. Galleries

Data specific to those organizations having a gallery space

6.1 Size of Gallery

What is the approximate size of your gallery?

	Commercial	Non-commercial	Total
N	25	11	36
mean	245	239	243
p25	50	63	60
p50	100	120	120
min	13	60	13
max	2000	1000	2000

6.2 Gallery Space Ownership vs Lease

Is this space owned or rented?

	N	%
Owned	11	26
Rented	32	74
TOTAL	43	100

N	Commercial	Non-commercial
Owned	8	3
Rented	20	12
TOTAL	28	15

%	Commercial	Non-commercial
Owned	29	20
Rented	71	80
TOTAL	100	100

6.3 Monthly Costs Associated with Space

What is the approximate monthly cost associated with the space (rental or mortgage/bond payment)?

Per month	Commercial	Non-commercial	Total
N	23	8	31
mean	12,403	10,441	11,897
p25	4,000	3,063	4,000

p50	7,000	6,750	7,000
min	750	384	384
max	50,965	33,000	50,965

Per m ²	Commercial	Non-commercial	Total
N	23	8	31
mean	114	101	111
p25	30	32	30
p50	63	79	66
min	5	1	1
max	378	367	378

6.4 Source of Artwork (Geography)

What proportion of artworks that you sell are sourced from... (indicate percentage)

Mean	Commercial	Non-commercial	TOTAL
Local artists?	87	76	84
Artists from other countries in Africa?	22	18	21
International, outside of Africa?	9	20	14

6.5 Average Price of Artworks Sold

What is the average price of artworks sold in your gallery? (choose ONE)

N	Commercial	Non-commercial	TOTAL
Less than R1000	1	1	2
R1000 - R5000	11	3	14
R5000 - R20000	14	7	21
R20 000 - R50 000	4	0	4
R50 000 - R100 000	1	1	2
R100 000 – R250 000	3	0	3
More than R250 000	0	1	1
TOTAL	34	13	47

%	Commercial	Non-commercial	TOTAL
Less than R1000	3	8	4
R1000 - R5000	32	23	30
R5000 - R20000	41	54	45
R20 000 - R50 000	12	0	9
R50 000 - R100 000	3	8	4
R100 000 – R250 000	9	0	6
More than R250 000	0	8	2
TOTAL	100	100	100

6.6 Commission Charged on Sale of Artwork

What commission and associated costs do you generally charge on the sale of work? (choose ONE)

N	Commercial	Non-commercial	TOTAL
No commission	1	4	5
0-10%	3	2	5
10-20%	3	0	3
20-30%	5	2	7
30-40%	14	4	19
40-50%	4	1	5
50-60%	1	0	1
60-70%	0	0	0
More than 70%	1	0	1
TOTAL	32	13	46

%	Commercial	Non-commercial	TOTAL
No commission	3	31	11
0-10%	9	15	11
10-20%	9	0	7
20-30%	16	15	15
30-40%	44	31	41
40-50%	13	8	11
50-60%	3	0	2
60-70%	0	0	0
More than 70%	3	0	2
TOTAL	100	100	100

6.7 Target Consumers

What kind/s of consumer/s does your gallery mainly target? (choose ONE)

N	Commercial	Non-commercial	TOTAL
low income earners	0	2	2
middle income earners	7	4	11
upper-middle income earners	12	5	17
high income earners	12	1	13
the very wealthy	3	1	4
TOTAL	34	13	47

%	Commercial	Non-commercial	TOTAL
low income earners	0	15	4
middle income earners	21	31	23
upper-middle income earners	35	38	36
high income earners	35	8	28
the very wealthy	9	8	9
TOTAL	100	100	100

6.8 Perception of Most Important Opportunity for Making Sales

What do you regard as the MOST important opportunity for making sales? (choose ONE)

N	Commercial	Non-commercial	TOTAL

exhibition openings	15	5	20
casual daytime visitors	11	2	13
special viewings	6	4	10
other, specify	2	2	4
TOTAL	34	13	47

%	Commercial	Non-commercial	TOTAL
exhibition openings	44	38	43
casual daytime visitors	32	15	28
special viewings	18	31	21
other, specify	6	15	9
TOTAL	100	100	100

Other include art fairs overseas and consultation

6.9 Perception of Most Significant Constraint/Challenge

What would you regard as the MOST significant constraint/challenge that you face as a gallerist?

N	Commercial	Non-commercial	TOTAL
insufficient/inadequate space	3	4	7
physical location of gallery	4	1	5
too much competition	2	0	2
poor levels of professionalism among artists	1	3	4
market downturn	23	5	28
TOTAL	33	13	46

%	Commercial	Non-commercial	TOTAL
insufficient/inadequate space	9	31	15
physical location of gallery	12	8	11
too much competition	6	0	4
poor levels of professionalism among artists	3	23	9
market downturn	70	38	61
TOTAL	100	100	100

What would you regard as the SECOND MOST significant constraint/challenge that you face as a gallerist?

N	Commercial	Non-commercial	TOTAL
insufficient/inadequate space	3	0	3
physical location of gallery	8	4	12
too much competition	5	1	6
poor levels of professionalism among artists	9	0	9
market downturn	6	6	12
TOTAL	31	11	42

%	Commercial	Non-commercial	TOTAL
insufficient/inadequate space	10	0	7
physical location of gallery	26	36	29
too much competition	16	9	14

poor levels of professionalism among artists	29	0	21
market downturn	19	55	29
TOTAL	100	100	100

7. Finances

7.1 Annual Income

Please indicate or estimate (even very roughly) your total income for 2008, from ALL sources (both arts-related and non-arts related)

Income	N	mean	p50	min	max
Education, training and development	16	2,433,768	1,194,257	10,000	14,900,000
Materials and Technical Services	14	553,250	435,000	120,000	1,785,467
Distribution/presentation - primary market	25	2,862,680	500,000	60,000	24,000,000
Distribution/presentation - secondary market	2	855,000	855,000	210,000	1,500,000
Reception	2	195,000	195,000	150,000	240,000
TOTAL	59	2,006,880	580,000	10,000	24,000,000

Income range	Freq.	Percent
10 000 – 50 000	1	2
50 000 – 100 000	2	3
100 000 – 250 000	10	17
250 000 – 500 000	11	18
500 000 – 1000 000	13	22
1000 000 – 5000 000	16	27
5000 000 – 10 000 000	3	5
10 000 000 +	3	5
Total	59	100

7.2 Income Breakdown

Please indicate or estimate (however roughly) what amount of this annual income was earned through:

Full sample	R (TOTAL)	N	R Mean	R Median
Product Sales	64,600,000	41	1,575,439	360,000
Provision of Services	25,200,000	31	812,126	85,000
Income from royalties	14,500	2	7,250	7,250
Income from investments	102,631	1	102,631	102,631
Subletting space	1,370,677	11	124,607	77,635
Funding agency grant - local source	4,634,898	12	386,242	300,000
Funding agency grant - international source	6,101,707	14	435,836	290,000
Government grant (non arts funding agency)	8,323,800	6	1,387,300	450,000
Corporate Sponsorship	813,005	9	90,334	45,000
Other (specify)	1,126,662	8	140,833	115,000

Education, training and development	R (TOTAL)	N	R Mean	R Median
Product Sales	4,053,853	9	450,428	299,230

Provision of Services	15,453,900	6	2,575,650	20,947
Income from royalties	4,000	1	4,000	4,000
Income from investments	102,631	1	102,631	102,631
Subletting space	1,088,677	6	181,446	83,818
Funding agency grant - local source	4,077,598	10	407,760	349,022
Funding agency grant - international source	4,418,707	8	552,338	358,068
Government grant (non arts funding agency)	8,311,800	5	1,662,360	500,000
Corporate Sponsorship	721,005	5	144,201	134,819
Other (specify)	878,115	6	146,353	500,000

Materials and Technical Services	R (TOTAL)	N	R Mean	R Median
Product Sales	2,356,730	6	392,788	290,000
Provision of Services	4,522,420	9	502,491	374,500
Income from royalties	10,500	1	10,500	10,500
Income from investments	0			
Subletting space	10,000	1	10,000	10,000
Funding agency grant - local source	257,300	1	257,300	257,300
Funding agency grant - international source	298,000	2	149,000	149,000
Government grant (non arts funding agency)	12,000	1	12,000	12,000
Corporate Sponsorship	30,000	1	30,000	30,000
Other (specify)	248,547	2	124,274	12,000

Distribution/presentation - primary market	R (TOTAL)	N	R Mean	R Median
Product Sales	56,387,398	23	2,451,626	420,000
Provision of Services	4,894,600	13	376,508	60,000
Income from royalties	0			
Income from investments	272,000	4	68,000	46,000
Subletting space	300,000	1	300,000	300,000
Funding agency grant - local source	1,385,000	4	346,250	325,000
Funding agency grant - international source	0			
Government grant (non arts funding agency)	0			
Corporate Sponsorship	62,000	3	20,667	14,000
Other (specify)	0			

Distribution/presentation - secondary market	R (TOTAL)	N	R Mean	R Median
Product Sales	1,660,000	2	830,000	830,000
Provision of Services	50,000	1	50,000	50,000
Income from royalties				
Income from investments				
Subletting space				
Funding agency grant - local source				
Funding agency grant - international source				
Government grant (non arts funding agency)				
Corporate Sponsorship				
Other (specify)				

Reception	R (TOTAL)	N	R Mean	R Median

Product Sales	135,000	1	135,000	135,000
Provision of Services	255,000	2	127,500	127,500
Income from royalties				
Income from investments				
Subletting space				
Funding agency grant - local source				
Funding agency grant - international source				
Government grant (non arts funding agency)				
Corporate Sponsorship				
Other (specify)				

7.3 Income Outlook

Do you expect your total income to be higher, lower or about the same this year? (single response)

	N	%
Higher	27	41
Lower	20	30
About the same	19	29
TOTAL	66	100

N	Higher	Lower	Same
Education, training and development	5	5	7
Materials and Technical Services	5	5	5
Distribution/presentation - primary market	16	7	6
Distribution/presentation - secondary market	0	1	1
Reception	1	2	0
TOTAL	27	20	19

%	Higher	Lower	Same
Education, training and development	29	29	41
Materials and Technical Services	33	33	33
Distribution/presentation - primary market	55	24	21
Distribution/presentation - secondary market	0	50	50
Reception	33	67	0
TOTAL	41	30	29

7.4 Annual Expenditure

Please indicate or estimate your total work-related expenditure in the financial year ending in 2008

Expenditure	N	mean	p50	min	max
Education, training and development	15	2,051,898	900,797	12,000	10,000,000
Materials and Technical Services	13	479,918	400,000	20,000	1,200,000
Distribution/presentation - primary market	26	2,567,490	365,000	38,000	24,000,000
Distribution/presentation - secondary market	2	633,500	633,500	267,000	1,000,000
Reception	2	200,000	200,000	180,000	220,000
TOTAL	58	1,817,916	485,000	12,000	24,000,000

7.5 Expenditure Breakdown

Please estimate what amount or percentage of this work-related expenditure was incurred through:

Full sample	R (TOTAL)	N	R Mean	R Median
Wages and salaries and related costs	40,013,290	50	800,266	195,967
Materials and Equipment	13,232,173	44	300,731	67,000
Publicity costs	3,465,134	31	111,779	24,000
Exhibition costs	5,291,429	28	188,980	34,000
Premises (rental or mortgage/bond)	10,879,709	37	294,046	81,200
Utilities costs and overheads	6,886,675	39	176,581	30,700
Communication costs	3,915,276	40	97,882	33,455
Travel costs	5,752,535	38	151,383	26,750
Transport and Freightage	9,258,405	26	356,093	18,345
Insurance	2,704,447	30	90,148	20,125
Other (specify)	2,866,954	12	238,913	48,173

Education, training and development	R (TOTAL)	N	R Mean	R Median
Wages and salaries and related costs	16,111,979	13	1,239,383	606,110
Materials and Equipment	3,211,168	10	321,117	228,832
Publicity costs	718,608	7	102,658	26,000
Exhibition costs	897,849	7	128,264	90,000
Premises (rental or mortgage/bond)	664,089	7	94,870	81,200
Utilities costs and overheads	2,680,084	11	243,644	53,000
Communication costs	1,508,092	12	125,674	42,200
Travel costs	1,075,084	11	97,735	26,500
Transport and Freightage	1,081,823	7	154,546	31,450
Insurance	638,014	11	58,001	21,216
Other (specify)	2,207,081	5	441,416	366,912

Materials and Technical Services	R (TOTAL)	N	R Mean	R Median
Wages and salaries and related costs	2,688,001	12	224,000	200,000
Materials and Equipment	1,685,732	11	153,248	74,000
Publicity costs	82,265	4	20,566	19,008
Exhibition costs	23,470	3	7,823	10,770
Premises (rental or mortgage/bond)	618,940	11	56,267	44,000
Utilities costs and overheads	256,700	8	32,088	25,000
Communication costs	286,416	11	26,038	22,000
Travel costs	424,688	9	47,188	37,500
Transport and Freightage	10,900	1	10,900	10,900
Insurance	88,984	6	14,831	12,500
Other (specify)	72,826	3	24,275	30,000

Distribution/presentation - primary market	R (TOTAL)	N	R Mean	R Median
Wages and salaries and related costs	20,904,616	21	995,458	150,000
Materials and Equipment	7,510,685	19	395,299	24,000
Publicity costs	2,629,920	17	154,701	30,000

Exhibition costs	4,320,110	17	254,124	38,000
Premises (rental or mortgage/bond)	9,225,679	17	542,687	120,000
Utilities costs and overheads	3,929,890	18	218,327	48,000
Communication costs	2,115,429	16	132,214	12,500
Travel costs	4,219,415	15	281,294	20,000
Transport and Freightng	8,146,003	16	509,125	23,452
Insurance	1,977,450	13	152,112	30,000
Other (specify)	587,046	4	146,762	35,523

Distribution/presentation - secondary market	R (TOTAL)	N	R Mean	R Median
Wages and salaries and related costs	96,700	2	48,350	48,350
Materials and Equipment	705,590	2	352,795	352,795
Publicity costs	25,340	2	12,670	12,670
Exhibition costs	50,000	1	50,000	50,000
Premises (rental or mortgage/bond)	360,000	1	360,000	360,000
Utilities costs and overheads		0	.	.
Communication costs	5,340	1	5,340	5,340
Travel costs	13,350	1	13,350	13,350
Transport and Freightng	10,680	1	10,680	10,680
Insurance				
Other (specify)				

Reception	R (TOTAL)	N	R Mean	R Median
Wages and salaries and related costs	212,000	2	106,000	106,000
Materials and Equipment	119,000	2	59,500	59,500
Publicity costs	9,000	1	9,000	9,000
Exhibition costs	0			
Premises (rental or mortgage/bond)	11,000	1	11,000	11,000
Utilities costs and overheads	20,000	2	10,000	10,000
Communication costs		0	.	.
Travel costs	20,000	2	10,000	10,000
Transport and Freightng	9,000	1	9,000	9,000
Insurance				
Other (specify)				

7.6 Replacement Value of Assets

What is the estimated replacement value of your work-related assets/things that you require to conduct your work?

Asset replacement	
N	57
mean	1,815,789
p25	100,000
p50	250,000
min	10,000
max	30,000,000

7.7 Debts/Liabilities

What is the estimated size of your debts/liabilities?

Debt	
N	57
mean	185,586
p25	50,000
p50	100,000
min	10,000
max	3,300,000

7.8 Income/Company Tax Registration

Are you registered for income or company tax?

	N	%
No	9	13
Yes	62	87
TOTAL	71	100

7.9 Reasons for Not Being Registered for Tax

If NO, why: (choose ONE)

	N	%
Not aware	2	29
I think I earn too little	1	14
Haven't found the time	0	0
Fall below current income/company tax threshold	3	57
Too much trouble/admin	0	0
Other, specify:	0	0
TOTAL	7	100

7.10 VAT registration

Are you registered as a VAT vendor through SARS?

	N	%
No	34	48
Yes	37	52
TOTAL	71	100

7.11 Reasons for Not Being Registered as a VAT vendor

If NO, why

	N	%
Don't know how VAT	2	6

Not applicable	10	31
Fall below current taxable income threshold	19	59
Too much trouble/admin	1	3
TOTAL	32	100

7.12 Insurance

Have you ever taken out any of the following types of insurance related to your business/work?

	N	%
Accident Insurance	21	30
Vehicle insurance	25	35
Travel insurance	15	21
Professional Indemnity insurance	15	21
Freight Insurance	22	31
Office/Studio Contents Insurance	11	15
Income Protection Plan	33	46
None of the above	9	13
TOTAL	151	

APPENDIX D: Interview Formats

Human Sciences Research Council - Survey: Visual Arts Sector Questionnaire for Artists

All information supplied remains CONFIDENTIAL to the Human Sciences Research Council

Some data may be confirmed via telephonic interview

Circle relevant response (if working in excel, drag the ones provided)



1. Basic Details and Overview

1,1 Full Name

1,2 Postal Address

1,3 Telephone number

1,4 Website address

1,5 Email address

1,6 Age

1,7 Gender

1,8 Race

1,9 Home Language

1,10 Nationality

1,11 Do you want to receive follow up information about this research project? (reports on findings etc)

1	yes
2	no

1,12 Which of the following applies most to your practice? (single response)

1	I pursue the visual arts as a hobby/recreational activity
2	I pursue the visual arts as a profession/career

1,13 Which of the following activities do you undertake in the course of your work as a visual artist? (multiple response)

1	education and training services
2	research
3	support services to artists
4	art materials supplier
5	materials manufacture
6	materials retail
7	producing artwork
8	production/project management, incl commissioning services

- ☐ 9 managing/promoting artists
- ☐ 10 curating exhibitions/projects
- ☐ 11 designing/installing artworks/exhibitions
- ☐ 12 selling artwork
- ☐ 13 framing services
- ☐ 14 conservation/restoration services
- ☐ 15 marketing and publicity services
- ☐ 16 art publishing, incl writing, editorial services, design
- ☐ 17 art media, incl writing, editorial services, design

1,14 Which of the following statements most accurately characterises your working process? (single response)

- ☐ 1 I mainly work by myself
- ☐ 2 I sometimes work in creative collaboration with others
- ☐ 3 I mainly work in creative collaboration with others
- ☐ 4 I do both more or less equally

1,15 What area/s of visual arts practice are you involved in? (multiple response)

- ☐ 1 contemporary, conceptual work, including new media, installation, video and performance based work
- ☐ 2 traditional artworks employing traditional materials and subject matter
- ☐ 3 public art
- ☐ 4 community arts
- ☐ 5 craft art/fine craft
- ☐ 6 other, specify

1,16 Which specific artmaking process do you MOSTLY employ? (single response)

- ☐ 1 Painting and Drawing
- ☐ 2 Sculpting
- ☐ 3 Photography
- ☐ 4 Print making
- ☐ 5 Performance/Live art
- ☐ 6 Video art
- ☐ 7 Installation art
- ☐ 8 New Media/Digital Arts
- ☐ 9 Illustration
- ☐ 10 Graphic Art
- ☐ 11 Cartooning
- ☐ 12 Other: Please specify

1,17 Which other specific artmaking processes do you ALSO employ in your practice? (multiple response)

- ☐ 1 Painting and Drawing
- ☐ 2 Sculpting
- ☐ 3 Photography
- ☐ 4 Print making
- ☐ 5 Performance art
- ☐ 6 Video art
- ☐ 7 Installation art
- ☐ 8 New Media/Digital Arts
- ☐ 9 Illustration
- ☐ 10 Graphic Art
- ☐ 11 Cartooning
- ☐ 12 Other: Please specify

1,18 What kind of premises do you mainly conduct your work as a visual artist from? (choose ONE)

- ☐ 1 Home workshop, studio or office (rented)
- ☐ 2 Home workshop, studio or office (owned)
- ☐ 3 Studio away from home (rented)
- ☐ 4 Studio away from home (owned)
- ☐ 5 Currently have no work premises
- ☐ 6 Other (specify)

1,19 How would you describe the business structure that you conduct your work as an artist through? (choose ONE)

- ☐ 1 Self-employed, no formal legal status
- ☐ 2 Self-employed-Sole Trader (sole trader means that you are registered as a provisional tax-payer with SARS)
- ☐ 3 Co-operative
- ☐ 4 Partnership
- ☐ 5 Closed Corporation
- ☐ 6 PTY/ltd
- ☐ 7 Section 21 company
- ☐ 8 Trust
- ☐ 9 Other

1,20 How long have you worked in this way?

years

1,21 How long have you been working as a visual artist for?

years

2. Career Development

2,1 What is your highest level of educational qualification? (choose ONE)

- ☐ 1 no formal schooling
- ☐ 2 up to grade 9
- ☐ 3 completed grade 9
- ☐ 4 up to grade 12 or FET/technical college equivalent
- ☐ 5 completed grade 12 or FET technical college equivalent
- ☐ 6 learnership or skills programme
- ☐ 7 undergraduate degree/diploma
- ☐ 8 postgraduate degree/diploma

2,2 Did you benefit from any of the following during the course of your development as a visual arts professional?

- ☐ 1 Art in primary school (multiple response)
- ☐ 2 Art in secondary school (public)
- ☐ 3 Art in secondary school (private)
- ☐ 4 Arts Training in an FET/technical college
- ☐ 5 Visual Arts training through a private college
- ☐ 6 Arts Training through an NGO provider
- ☐ 7 Arts training through a SETA learnership or skills programme
- ☐ 8 Undergraduate visual arts degree
- ☐ 9 Postgraduate visual arts degree
- ☐ 10 Apprenticeship/mentorship
- ☐ 11 Private classes with a practicing professional
- ☐ 12 Workshops and short courses
- ☐ 13 Participated in a residency

- ☐ 14 Awarded a fellowship
- ☐ 15 No formal training in the arts/self taught

2,3 Have you done any of the following in the last 5 years? (multiple response)

- ☐ 1 Had a solo show at a major gallery (public or commercial)
- ☐ 2 Had a solo show at a smaller gallery (public or commercial)
- ☐ 3 Had a solo show at a gallery/institution outside of South Africa
- ☐ 4 Participated in a group show at a major gallery
- ☐ 5 Participated in a group show at a smaller gallery
- ☐ 6 Participated in an exhibition at a community arts centre, festival or similar
- ☐ 7 Participated in a group show at a gallery/institution outside of South Africa
- ☐ 8 Had a work commissioned or purchased by a public gallery, organisation or institution
- ☐ 9 Had a work commissioned or purchased by a private company or corporate collection
- ☐ 10 Had a work commissioned by a private individual
- ☐ 11 Had artwork reviewed in a book or published in a professional journal
- ☐ 12 Had a work or works selected for inclusion on an Internet site
- ☐ 13 Won an award or competition
- ☐ 14 Participated in a residency
- ☐ 15 Other: Please specify

2,4 What would you regard as the moment that defined your becoming a professional artist? (choose ONE)

- ☐ 1 Being able to support myself financially through my work as a visual artist
- ☐ 2 Staging a solo exhibition
- ☐ 3 Participating in a group exhibition
- ☐ 4 Winning a prize or competition
- ☐ 5 Being awarded a public or private commission
- ☐ 6 Receiving funding for a project/exhibition
- ☐ 7 I don't regard myself as a professional artist

How old were you when this happened? (ignore if not professional artist)

2,5 Years

2,6 What have been the primary contributing factors to your professional development or success to date? Please rate them as follows: 1 = critical; 2 = important; 3 = useful; 4 = irrelevant

- My arts training
- My talent
- My determination and resourcefulness
- My general education
- Family networks
- Art school networks
- Participating in competitions
- Peer/Professional networks
- Assistance/support from a gallerist/dealer/patron
- Support from a mentor
- A lucky break (eg residency or exhibition opportunity etc)
- Financial assistance or funding
- Recognition and encouragement from peers and friends
- Other, specify: _____

3. Work Situation

- 3,1 On average, how many hours would you say you work in a week, *counting both arts-related and non-arts related work?* (bear in mind that a standard 8 hour work shift, five days a week = 40 hours)

- 3,2 Generally, how long is your working week (including ALL of your work activities)

- ☐ 1 less than 5 day working week
☐ 2 5 day working week
☐ 3 6 day working week
☐ 4 7 day working week

- 3,3 What percentage of your working time do you spend on each of the following activities generally?

percentage

- ☐ Producing own artwork and directly related activities (eg research, sourcing materials, making work etc)?
☐ Networking
☐ Other art-related work (eg writing, technical work, exhibition design, working in a gallery, etc)
☐ Art-related Teaching
☐ Voluntary work
☐ Studying
☐ Non arts related work
☐ 0 **Total (should add up to 100%)**

- 3,4 If you spend less than 50% of your time 'producing own artwork', which of the following most closely describes the reasons for not devoting more time to this activity (you can choose more than one)

- ☐ 1 I am happy with the amount of time I spend on my creative work
☐ 2 I have to earn supplementary income elsewhere to survive/get by
☐ 3 Domestic/family responsibilities
☐ 4 Community responsibilities
☐ 5 Other: Please specify

- 3,5 Do you have to spend time engaged in work/business outside of the visual arts to sustain your work as a visual artist?

- ☐ 1 Yes
☐ 2 No (go to 3.5)

- 3,6 If YES, why are you involved in other activities to support your "creative" activity (choose one or more)?

- ☐ 1 These other activities subsidise my creative activity
☐ 2 The visual arts market is too small
☐ 3 Risk reduction/diversification
☐ 4 These other activities are related to the expansion of my business/practice
☐ 5 Other (specify)

- 3,7 How would you describe where you live and work? (choose ONE)

- ☐ 1 Urban – Major City - Suburban/CBD
☐ 2 Urban – Major Ciy - Township
☐ 3 Urban - town
☐ 4 Semi rural, small town
☐ 5 Deep rural/remote

- 3,8 How does your current location impact on your market access/ability to sell your work?

- ☐ 1 Positively
- ☐ 2 Negatively
- ☐ 3 Does not affect it at all

Please state which province/country you are originally from, and which province you currently live and work in?
(choose ONE from each column)

3.9.1

Currently living and working in...		Originally from....	
☐ 1	Gauteng	☐ 1	Gauteng
☐ 2	Western Cape	☐ 2	Western Cape
☐ 3	Kwazulu Natal	☐ 3	Kwazulu Natal
☐ 4	Free State	☐ 4	Free State
☐ 5	North West	☐ 5	North West
☐ 6	Limpopo	☐ 6	Limpopo
☐ 7	Mpumalanga	☐ 7	Mpumalanga
☐ 8	Eastern Cape	☐ 8	Eastern Cape
☐ 9	Northern Cape	☐ 9	Northern Cape
☐ 10	other country	☐ 10	other country

3.9.2

3.10.1 What is the MOST important context for selling your work? (choose ONE)

- ☐ 1 From my home/studio
- ☐ 2 At markets/festivals
- ☐ 3 Through local galleries
- ☐ 4 Through international galleries
- ☐ 5 Through commissions
- ☐ 6 Via a website
- ☐ 7 Other, specify

3.10.2 What is the SECOND MOST important context for selling your work?

- ☐ 1 From my home/studio
- ☐ 2 At markets/festivals
- ☐ 3 Through local galleries
- ☐ 4 Through international galleries
- ☐ 5 Through commissions
- ☐ 6 Via a website
- ☐ 7 Other, specify

3.11.1 At the moment, the MOST financially significant market for your work is...

- ☐ 1 local? (in your immediate locality)
- ☐ 2 regional? (beyond immediate locality, but not national in scope/reach)
- ☐ 3 national?
- ☐ 4 continental/African?
- ☐ 5 international?

3.11.2 At the moment, the SECOND MOST financially significant market for your work is...

- ☐ 1 local? (in your immediate locality)
- ☐ 2 regional? (beyond immediate locality, but not national in scope/reach)
- ☐ 3 national?
- ☐ 4 continental/African?
- ☐ 5 international?

3.12 Do tourists form a significant part of your target market/buyers of your work?

- ☐ 1 yes
- ☐ 2 no

3,13 How would you characterise the market for your work? (choose ONE)

- ☐ 1 healthy, growing
- ☐ 2 gradual improvement
- ☐ 3 stagnant
- ☐ 4 in decline
- ☐ 5 in sharp decline

3.14.1 Please indicate which of the following methods of marketing/promoting your artwork (other than through exhibitions) is the MOST important (choose ONE)?

- ☐ 1 Networks/meeting people
- ☐ 2 Through an on-line presence (e.g. website)
- ☐ 3 Through an agent, gallerist or dealer
- ☐ 4 Through brochures and catalogues
- ☐ 5 Other specify:.....

3.14.2 Please indicate which of the following methods of marketing/promoting your artwork (other than through exhibitions) is the SECOND MOST important (choose ONE)?

- ☐ 1 Networks/meeting people
- ☐ 2 Through an on-line presence (e.g. website)
- ☐ 3 Through an agent, gallerist or dealer
- ☐ 4 Through brochures and catalogues
- ☐ 5 Other specify:.....

3,15 What is the average selling price of your artworks? (choose ONE)

- ☐ 1 less than R1000
- ☐ 2 R1000 - R5000
- ☐ 3 R5000 - R20000
- ☐ 4 R20 000 - R50 000
- ☐ 5 R50 000 - R100 000
- ☐ 6 R100 000 - R250 000
- ☐ 7 R250 000 or more

3,16 How would you characterise your relationship with the gallery system? (choose ONE)

- ☐ 1 I have an agreement that binds me to a single gallery as my sole representative
- ☐ 2 I show my work primarily at one gallery, but am free to show and sell my work elsewhere
- ☐ 3 I show my work at a variety of galleries
- ☐ 4 I have very little or no engagement with galleries
- ☐ 5 Other, specify....

3,17 What commission and associated costs are you **generally** charged on the sale of your work by galleries, dealers and other intermediaries? (choose ONE)

- ☐ 1 no commission
- ☐ 2 0-10%
- ☐ 3 10-20%
- ☐ 4 20-30%
- ☐ 5 30-40%
- ☐ 6 40-50%
- ☐ 7 50-60%

8	60-70%
9	more than 70%

3,18 Which of the following initiatives do you think plays the MOST significant role in the development of the sector? (choose ONE)

1	local Biennale events (eg Johannesburg Biennale, CAPE AFRICA)
2	Johannesburg Art Fair
3	local arts festivals
4	local arts markets (eg art in the park)
5	corporate art competitions and awards
6	non-profit arts development organisations
7	artist-run project/exhibition spaces
8	residency and international exchange programmes

3,19 Which of the following issues represent significant obstacles to your career development/work? Rank them as follows: 1 = major; 2 = moderate; 3 = minor; 4 = not significant

The high cost of....

3.19.1	materials and supplies	
3.19.2	renting or acquiring space	
3.19.3	utilities (electricity, etc)	
3.19.4	communication (cell phone, landline, email etc)	
3.19.5	technology	
3.19.6	staging an exhibition	
3.19.7	labour (assistants, staff, etc)	

Market Conditions

3.19.8	shortage of exhibition/project opportunities - local	
3.19.9	shortage of exhibition/project opportunities - international	
3.19.10	lack of art -related work opportunities	
3.19.11	lack of demand/buyers	
3.19.12	level of competition in the industry	
3.19.13	high commissions charged by galleries	
3.19.14	changing trends which influence demand	

Lack of access to....

3.19.15	skilled labour	
3.19.16	finance	
3.19.17	funding	
3.19.18	raw Materials	
3.19.19	professional Support/advice	
3.19.20	residency opportunities	

Regulatory environment - difficulties associated with...

3.19.21	SARS/tax compliance	
3.19.22	customs/trade regulations	
3.19.23	labour regulations	
3.19.24	lack of professionalism within the industry	
3.19.25	lack of internal regulation within the industry	
3.19.26	lack of industry promotion from government	
3.19.27	business licensing requirements	
3.19.28	issues related to the freedom of expression	

Personal Factors

3.19.29	my lack of skills or knowledge	

3.19.30	lack of confidence in my own work	
3.19.31	lack of support from family & friends	
3.19.32	demands on my time at home	
Discrimination		
3.19.33	physical disability or illness	
3.19.34	psychological condition or mental illness	
3.19.35	racial discrimination	
3.19.36	gender discrimination	
3.19.37	discrimination because of my lack of qualifications	
3.19.38	discrimination because of my nationality	
3.19.39	discrimination because I am a person with a disability	
3.19.40	Other (Please specify)...	

If you have ranked more than THREE of the above as 'major', review these and decide which are the three most significant issues and assign the others as 'moderate'

3.20 During the last five years, have there been significant periods (I.e. more than three months) in which you have been economically inactive (unable to generate income from your work or other employment), excluding time spent in study or training?

1

yes

2

no

3.21.1 What do you see as your MOST important professional development need? (choose ONE)

1

Opportunities for research and study related to my practice (eg postgraduate study, a fellowship, etc)

2

Finding a gallerist/dealer to represent me/show my work

3

Learning how to manage my finances properly

4

Learning how to market myself more effectively

5

Learning new technologies relevant to my practice

6

Acquiring legal skills/knowledge relevant to my practice

7

Help with obtaining funding

8

Help with obtaining corporate sponsorship

9

Help with accessing international opportunities

10

Increased web presence (marketing, distribution ...)

11

Other (specify)

3.21.2 What do you see as being your SECOND MOST important professional development need?

1

Opportunities for research and study related to my practice (eg postgraduate study, a fellowship, etc)

2

Finding a gallerist/dealer to represent me/show my work

3

Learning how to manage my finances properly

4

Learning how to market myself more effectively

5

Learning new technologies relevant to my practice

6

Acquiring legal skills/knowledge relevant to my practice

7

Help with obtaining funding

8

Help with obtaining corporate sponsorship

9

Help with accessing international opportunities

10

Increased web presence (marketing, distribution ...)

11

Other (specify)

3.22 How do you generally feel about your future in the sector? (choose ONE)

1

very positive, there are lots of opportunities for growth and career development

2

positive, there are some opportunities for growth and career development

- ☐ 3 neutral
- ☐ 4 negative, the outlook is poor
- ☐ 5 very negative, I am looking for opportunities in other sectors
- ☐ 6 uncertain

Retirement/Medical Aid/Insurance

3,23 Do you have any of the following types of provision for retirement in place? (if 'None of the above' go to 3.25)

- ☐ 1 Pension Fund
- ☐ 2 Provident Fund
- ☐ 3 Retirement Annuity
- ☐ 4 Investment in stocks
- ☐ 5 Savings
- ☐ 6 None of the above

3,24 Do you regard these provisions as adequate?

- ☐ 1 Yes
- ☐ 2 No
- ☐ 3 Don't know

3,25 If you have made no provision for retirement do you feel that the provisions of social grants for the elderly provided by the state will be adequate for your needs?

- ☐ 1 Yes
- ☐ 2 No
- ☐ 3 Don't know

3,26 Have you ever taken out any of the following types of insurance *related to your business/work*?

- ☐ 1 Accident Insurance
- ☐ 2 Vehicle insurance
- ☐ 3 Travel insurance
- ☐ 4 Professional Indemnity insurance
- ☐ 5 Freight Insurance
- ☐ 6 Income Protection Plan
- ☐ 7 Office/Studio Contents Insurance
- ☐ 8 None of the above

3,27 Are you a member of a medical scheme or hospital plan?

- ☐ 1 Medical Scheme
- ☐ 2 Hospital Plan
- ☐ 3 Neither

3,28 If you answered "neither" to the previous question, which of the following statements most accurately describes your reason for not having medical cover?

- ☐ 1 I cannot afford medical cover
- ☐ 2 It is more economical for me to address the cost of medical issues as they arise
- ☐ 3 I am happy with the service provided by state hospitals

4. Funding

4,1 During the last three years have you APPLIED FOR funding from a governmental or private source?

- ☐ 1 Yes
- ☐ 2 No

4,2 If NO, what was the MAIN reason for not applying for funding? (choose ONE and then go to 4.6.1)

- ☐ 1 No experience in writing proposals
- ☐ 2 My writing skills are poor
- ☐ 3 It is pointless, I would fail to get it
- ☐ 4 the available grants are inadequate for my needs
- ☐ 5 It depends on whom you know
- ☐ 6 Admin compliance requirements of funders
- ☐ 7 Do not need funding for my work
- ☐ 8 Other (specify)

4,3 If YES, which of the following have you applied to?:

- ☐ 1 National Arts Council
- ☐ 2 National Lottery
- ☐ 3 Department of Arts and Culture
- ☐ 4 Provincial government
- ☐ 5 Local government
- ☐ 6 Business Arts South Africa
- ☐ 7 Arts and Culture Trust
- ☐ 8 International Arts Funding Body (Pro Helvetia, Goethe Institute, French Institute, Culture France, etc)
- ☐ 9 Private Foundation
- ☐ 10 Corporate sponsorship
- ☐ 11 Corporate funding
- ☐ 12 Patron
- ☐ 13 Arts organisation

4,4 Did you receive funding from any of these sources?

- ☐ 1 National Arts Council
- ☐ 2 National Lottery
- ☐ 3 Department of Arts and Culture
- ☐ 4 Provincial government
- ☐ 5 Local government
- ☐ 6 Business Arts South Africa
- ☐ 7 Arts and Culture Trust
- ☐ 8 International Funding Body
- ☐ 9 Private Foundation
- ☐ 10 Corporate sponsorship
- ☐ 11 Corporate funding
- ☐ 12 Patron
- ☐ 13 Arts organisation
- ☐ 14 Did not receive funding

4,5 Of those funding sources that you have applied to, which do you regard as being the most responsive to the needs of the visual arts sector? (choose ONE)

- ☐ 1 National Arts Council
- ☐ 2 National Lottery
- ☐ 3 National Government
- ☐ 4 Provincial Government
- ☐ 5 Local Government

- ☐ 6 Business Arts South Africa
- ☐ 7 Arts and Culture Trust
- ☐ 8 International Funding Body
- ☐ 9 Private Foundation
- ☐ 10 Corporate sponsorship
- ☐ 11 Corporate funding
- ☐ 12 Patron
- ☐ 13 Arts organisation

4.6.1 What do you regard as the MOST important purpose for arts funding in general? (choose ONE)

- ☐ 1 supporting artists to produce their creative work
- ☐ 2 promoting capacity-building and networking (workshops, conferences, courses, etc)
- ☐ 3 building new audiences (through for example art education programmes)
- ☐ 4 developing new markets
- ☐ 5 enabling international exposure and linkage for South African artists and/or galleries
- ☐ 6 developing new talent (eg through mentorships, apprenticeships, etc)
- ☐ 7 broadening access to participation in the arts (eg art education programming)
- ☐ 8 subsidising innovative arts media
- ☐ 9 research

4.6.2 What do you regard as the SECOND MOST important purpose for arts funding in general? (choose ONE)

- ☐ 1 supporting artists to produce their creative work
- ☐ 2 promoting capacity-building and networking (workshops, conferences, courses, etc)
- ☐ 3 building new audiences (through for example art education programmes)
- ☐ 4 developing new markets
- ☐ 5 enabling international exposure and linkage for South African artists and/or galleries
- ☐ 6 developing new talent (eg through mentorships, apprenticeships, etc)
- ☐ 7 broadening access to participation in the arts (eg art education programming)
- ☐ 8 subsidising innovative arts media
- ☐ 9 research

4.7 What do you regard as being the MOST important purpose for arts funding for individual artists?

- ☐ 1 Enabling exclusive focus on my creative output and research by covering living costs and/or overheads
- ☐ 2 Addressing costs of materials and equipment that I otherwise would not be able to afford
- ☐ 3 Enabling further study or training
- ☐ 4 Enabling international or local travel to gain experience, exposure and networking
- ☐ 5 Addressing costs of exhibiting work or producing catalogue of work
- ☐ 6 Other purpose, specify.....

4.8 Have you applied for loan finance from a bank during the course of the last three years?

- ☐ 1 Yes
- ☐ 2 No

4.9 If NO, what was the reason for not applying?

- ☐ 1 No need for loan finance
- ☐ 2 No experience in dealing with banks
- ☐ 3 It is pointless, I would fail to get it
- ☐ 4 It depends on whom you know
- ☐ 5 Admin compliance requirements of bank
- ☐ 6 Other (specify)

4.10 If YES, was your application successful?

1	Yes
2	No

4.11 During the course of the last three years, have you obtained a loan from an informal source such a money-lender, friend or relative?

1	Yes
2	No

5. Staff/Employees

5.1 Do you employ anyone on either a part-time, full-time or occasional basis to assist you with any aspect of your work?

1	Yes
2	No

IF NO, IGNORE THIS SECTION

5.2 How many administrative staff do you employ? (eg book-keeper, PA)

Indicate number in each box

	Full-time
	Part-time
	Short term contract

5.3 How many technical staff/assistants do you employ?

Indicate number in each box

	Full-time
	Part-time
	Short term contract

5.4 How many specialised staff do you employ? (eg research, PR)

Indicate number in each box

	Full-time
	Part-time
	Short term contract

5.5 If you do employ staff, please complete the following demographic table to the best of your ability, indicating the number of staff members in each category:

	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female
Administrative								
Assistants								
Specialised								
Other								

5.6 Please indicate numbers of staff by age and disability:

	Disabled Male	Disabled Female	younger than 36	36+
Administrative				
Assistants				
Specialised				
Other				

5,7 Indicate or estimate how many of the people you employ fall into each of the following categories:

- ☐ tertiary education graduates (postgraduate)
- ☐ university graduates (undergraduate)
- ☐ high school/college graduates?
- ☐ primary school graduates?
- ☐ informally trained/no formal education?

5,8 Do you provide employees with any benefits? If yes, indicate which of the following:

- ☐ 1 Pension/Provident Fund
- ☐ 2 Savings Plan
- ☐ 3 Unemployment Insurance Fund
- ☐ 4 Medical Aid
- ☐ 5 Hospital Plan
- ☐ 6 none of the above

5,9 If not, indicate which of the following most accurately describes why this is the case:

- ☐ 1 too costly
- ☐ 2 makes more sense for employees to make their own decisions on benefits in relation to their needs
- ☐ 3 not aware of such benefit schemes

6. Professional Practice Issues

6,1 Do you believe you have copyright over artworks that you produce and sell to others?

- ☐ 1 Yes
- ☐ 2 No
- ☐ 3 Don't know

6,2 Have you ever received payments for the reproduction of artworks or royalties on writing that you have produced?

- ☐ 1 Never
- ☐ 2 Once or twice a year
- ☐ 3 Frequently, though not a significant income source
- ☐ 4 Frequently, this is a significant source of income

6,3 Have you ever assigned copyright in a work of art or piece of writing you produced to someone else?

- ☐ 1 Yes
- ☐ 2 No
- ☐ 3 Don't know

6,4 If, YES, what was the reason?

- ☐ 1 Was required in order to secure a commission/contract
- ☐ 2 Creative work was produced as an employee of an organisation
- ☐ 3 Other reason, specify

6,5 Are you aware of your copyright over a work ever having been infringed?

- ☐ 1 Yes (eg someone reproducing your work without your permission)
- ☐ 2 No

6,6 If YES, did you take any action to prevent infringement?

- ☐ 1 Yes, action unsuccessful
- ☐ 2 Yes, action successful or partially successful

☐ 3 No

6,7 Moral rights in artistic work include the right of attribution as a creator, and the right to have the integrity of the work respected and not altered, defaced, damaged or destroyed. As far as you are aware, have you ever had your moral rights infringed?

☐ 1 Yes

☐ 2 No

6,8 If YES, what was the nature of the infringement?

☐ 1 Work was damaged or destroyed

☐ 2 Work was altered

☐ 3 I was not acknowledged as the creator of the work

☐ 4 Other, specify _____

6,9 Are you a member of an industry organisation or association? (eg Ceramics SA, SANAVA and affiliates, VANSa)

☐ 1 Yes

☐ 2 No

6,10 If NO, which of the following most accurately describes the reasons for not being a member? (can choose more than one)

☐ 1 Not aware of any industry bodies or associations in my sector

☐ 2 Not interested in such bodies

☐ 3 Don't believe any real benefits attach to such membership

☐ 4 Don't know what the benefits are

6,11 If YES, what do you see as being the MOST significant benefit you obtain from this membership (choose ONE)

☐ 1 Information

☐ 2 Advice

☐ 3 Networking

☐ 4 Marketing Opportunities

☐ 5 Training/Professional Development

☐ 6 Access to funding opportunities

☐ 7 Peer Support

☐ 8 Other, specify.....

6,12 How do you use computers in your work?

☐ 1 Administration

☐ 2 Networking

☐ 3 Internet-based research

☐ 4 As a creative medium

☐ 5 On-line marketing/sales

☐ 6 Do not use computers

☐ 7 Other purpose, specify:

7. Finances

7,1 Please indicate or estimate (even very roughly) your total income for 2008, from ALL sources (both arts-related and non-arts related)

(You can also arrive at an estimate by answering 7.2)

R (use simple numbers, without spaces, eg 90000, not R90 000)

7,2 Please indicate or estimate (however roughly) what amount of this annual income was earned through:
© Human Sciences Research Council

If amounts are indicated use column A, if percentages, column B

	A		B	
	amount	%	%	amount
Income directly related to creative work	0	#DIV/0!	0	0
Private Sales (from your home/studio)		#DIV/0!		0
Sales through galleries		#DIV/0!		0
On-line sales		#DIV/0!		0
Fees from private commissions		#DIV/0!		0
Fees from public commissions		#DIV/0!		0
Income from royalties		#DIV/0!		0
Prizes and Awards		#DIV/0!		0
Funding agency grant - international		#DIV/0!		0
Funding agency grant - local		#DIV/0!		0
Government grant (non arts funding agency)		#DIV/0!		0
Corporate Sponsorship		#DIV/0!		0
Individual patronage		#DIV/0!		0
Fellowship or research grant		#DIV/0!		0
Income derived from other activities related to creative work	0	#DIV/0!	0	0
Teaching (in the arts)		#DIV/0!		0
Community Arts work		#DIV/0!		0
Working in a gallery		#DIV/0!		0
Provision of other Art-Related Products & Services		#DIV/0!		0
Income derived from non-arts related work or sources:	0	#DIV/0!	0	0
Income from work outside the sector		#DIV/0!		0
Social Grant		#DIV/0!		0
Pension		#DIV/0!		0
Investments		#DIV/0!		0
Other (specify)		#DIV/0!		0
TOTAL	0	#DIV/0!	0	0

above figure should = 7.1 should equal 100%

7,3 Do you expect your total income to be higher, lower or about the same this year? (single response)

1 higher
2 lower
3 about the same

7,4 What percentage of your income is derived from regular monthly sources, as opposed to (irregular) once-off sales, commissions and so on?

%

7,5 Please indicate or estimate your total *work-related* expenditure in the financial year ending in 2008

(You can arrive at an estimate by answering 7.6)

R (use simple numbers, without spaces, eg 90000, not R90 000)

7,6 Please estimate what amount or percentage of this work-related expenditure was incurred through:

If amounts are indicated use column A, if percentages, column B

	A		B	
	amount	%	%	amount
Materials		#DIV/0!		0
Work premises		#DIV/0!		0
Equipment		#DIV/0!		0
Labour (assistant/s)		#DIV/0!		0
Framing		#DIV/0!		0

Exhibition costs directly addressed by you
 Documentation of Work
 Research costs
 Travel costs (work-related)
 Training/Professional Development
 Exhibition costs
 Promotion/publicity costs
 Transport and Freightage
 Insurance
 Other (specify)
TOTAL

	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
	#DIV/0!		0
0	#DIV/0!	0	0

above figure should = 7.5

should equal 100%

7,7 What is the estimated replacement value of your *work-related* assets/things that you require to conduct your work?
 (eg computers, vehicle, tools, equipment, studio/work premises; if you have a studio at your home, estimate **ONLY** the value of the studio and contents, not the value of the entire property; **do not** include the value of unsold artworks)

R

7,8 What is the estimated size of your debts/liabilities?
 (eg student loan, general bank loan, family/friend loan, mortgage on studio space)

R

Tax

7.9.1 Are you registered for income or company tax?

- ☐ 1 Yes
☐ 2 No

7.9.2 If NO, why: (choose ONE)

- ☐ 1 Not aware of tax issues
☐ 2 I think I earn too little to pay income tax
☐ 3 Haven't found the time to address this
☐ 4 Fall below current income/company tax threshold/not required to pay income tax
☐ 5 Too much trouble/administration
☐ 6 Other, specify:

7.10 Are you registered as a VAT vendor through SARS?

- ☐ 1 Yes
☐ 2 No

7.10.1 If not, why?

- ☐ 1 Don't know how VAT applies to my work/business
☐ 2 Not applicable to my tax/legal status
☐ 3 Fall below current taxable income threshold required for compliance (taxable income less than R1 million)
☐ 4 Too much trouble/administration

Human Sciences Research Council - Survey: Visual Arts

Questionnaire Format for Businesses, Organisations and Freelance Professionals other than Visual Artists

All information supplied remains CONFIDENTIAL to the Human Sciences Research Council

Information will be confirmed via telephonic interview

Drag circle over relevant response

In the case of a specialist service provider that is a sub-division of a larger corporate entity,

which is not visual arts-focussed, reflect employment and financial data for sub-division only (eg a corporate collection)

For office only:

Interviewer:

Date of Interview:

Time of Interview:

1. Basic Details/Overview

1,1 The name of your organisation

(for freelance professionals 1.1 and 1.2 may be the same)

1,2 Name of Business Owner/Director

1,3 Postal Address

1.3.1

1,4 Telephone number/s

1,5 Website address

1,6 Email address

1,7 Age (of business-owner)

1,7 Gender

1,8 Race

1,9 Home Language

1,11 Do you want to receive follow up information about this research project? (reports on findings etc)

1	yes
2	no

1,12 Which of the following best describes your organisation/business? (choose ONE)

1	art collection/collector - corporate/private
2	artists/arts association
3	arts consultant/consultancy
4	arts development organisation (non-profit)
5	artist-run gallery/project space
6	art journalist/critic
7	art publisher
8	art restorer/conservator
9	auctioneer
10	community arts centre
11	dealer
12	education and training provider - private
13	framer/framing supplier
14	gallery - commercial/private

- ☐ 15 arts media specialist/publicist
- ☐ 16 materials manufacturer
- ☐ 17 materials supplier
- ☐ 18 on-line artist portfolio or gallery
- ☐ 19 technical services provider
- ☐ 20 other, specify

1,13 Which of the following areas of activity are you/your business/organisation involved in within the visual arts sector

- ☐ 1 education and training services
- ☐ 2 research
- ☐ 3 support services to artists
- ☐ 4 art materials supplier
- ☐ 5 materials manufacture
- ☐ 6 materials retail
- ☐ 7 producing artwork
- ☐ 8 production/project management, incl commissioning services
- ☐ 9 managing/promoting artists
- ☐ 10 curating exhibitions/projects
- ☐ 11 designing/installing artworks/exhibitions
- ☐ 12 selling artwork
- ☐ 13 framing services
- ☐ 14 conservation/restoration services
- ☐ 15 marketing and publicity services
- ☐ 16 art publishing, incl writing, editorial services, design
- ☐ 17 art media, incl writing, editorial services, design
- ☐ 18 other, specify

1,14 Which area/s of visual arts practice do you primarily deal with in the course of the above activities? (you can choose more than one)

- ☐ 1 contemporary, conceptual work, including new media, installation, video and performance based work
- ☐ 2 traditional artworks employing traditional materials and subject matter
- ☐ 3 public art
- ☐ 4 community arts
- ☐ 5 craft art
- ☐ 6 other, specify

1,15 Where do you/your business/organisation operate from?

- ☐ 1 Home workshop, studio or office (rented)
- ☐ 2 Home workshop, studio or office (owned)
- ☐ 3 Premises away from home (rented)
- ☐ 4 Premises away from home (owned)
- ☐ 5 Currently have no work premises
- ☐ 6 Other (specify)

2. Legal Structure and Governance

2,1 Please indicate whether you/your business or organisation is constituted as a:

- ☐ 1 Freelance/independent contractor/self-employed
- ☐ 2 Sole trader
- ☐ 3 Partnership
- ☐ 4 Co-operative

5	Closed Corporation (cc)
6	PTY Ltd
7	Specialist sub-division within a larger corporate structure
8	Voluntary Association
9	Section 21 company
10	Trust
11	Other

provincial government institution

2,2 How long have you traded/operated in this form?

4

 years

2,3 If you are a section 21, voluntary association or a Trust, are you registered as a non-profit organisation? (if NO, goto 2.5)

1

 Yes

2

 No

2,4 If you are a section 21, voluntary association or a Trust, could you indicate the demographics of your Board of

	Female	Male	under 35	35+	
Black					0
Coloured					
Indian/Asian					
White					

2,5 If you are a business entity (self-employed, sole trader, independent contractors, cc, PTY (Ltd), could you indicate the

	Female	Male	under 35	35+	
Black					0
Coloured					
Indian/Asian					
White					

2,6 If you have either a Board of Trustees, Board of Directors or similar governance structure, please indicate how often this

1

 Once a year

2

 Twice a year

3

 Quarterly

4

 Monthly

5

 Other

3. Staffing

3.1 Staff numbers

3.1.1 Do you/your organisation/business employ anyone on either a part-time, full-time or occasional basis to perform any aspect of your work?

1

 Yes

2

 No

IF NO, IGNORE THIS SECTION and proceed to 4.

3.1.2 How many people does your business/organisation employ in senior management positions?

Full time

 eg Partners, Directors, CEO, Managing Director, General Manager, Head Curator

Part time

 i.e. people who are involved in managing the entire organisation

Short term contract

- 3.1.3 How many people does your business/organisation employ in specialist middle management positions?
- ☐ Full time (eg Curator, Head of a Division or Department)
- ☐ Part time people who are involved in managing particular sub-units of the organisation
- ☐ Short term contract note: micro and small organisations will not generally employ middle management
- 3.1.4 How many people does your business/organisation employ in specialist technical positions?
- ☐ Full time (eg exhibition designer, trainer, conservator, publicist, fundraiser)
- ☐ Part time i.e. people who perform specific sets of specialised tasks
- ☐ Short term contract
- 3.1.5 How many people does your business/organisation employ in ancillary and support positions?
- ☐ Full time (eg cleaning, security, reception)
- ☐ Part time i.e. people who perform non-specialist routine tasks
- ☐ Short term contract
- 3.1.6 Number of volunteers that work for your organisation (if applicable)?
-

3.2 Staff Profile

- 3.2.1 Please complete the following demographic table to the best of your ability, indicating the number of staff members in each

	Black Male	Black Female	Coloured Male	Coloured Female	Indian Male	Indian Female	White Male	White Female
Senior Management								
Middle Management								
Specialist Technical								
Ancillary and Support								
Volunteers								

- 3.2.2 Please indicate numbers of staff by age and disability:

	Disabled Male	Disabled Female	younger than 36	36+
Senior Management				1
Middle Management			2	7
Specialist Technical				12
Ancillary and Support				5
Volunteers			9	

36

- 3.2.3 Indicate or estimate how many people you employ fall into each of the following categories?

- 1 tertiary education graduates (postgraduate)
- 9 tertiary education graduates (undergraduate)
- 20 high school/college graduates?
- 4 primary school graduates?
- 2 informally trained/no formal education?

- 3.2.4 What is the highest level of education of the top manager or principal owner of your organisation?

- 1 no formal education
- 2 Up to Grade 9
- 3 Up to Grade 12

- ☐ 4 Vocational training with Grade 9
- ☐ 5 Vocational training with Grade 12
- ☐ 6 Diploma with Grade 9
- ☐ 7 Diploma with Grade 12
- ☐ 8 Completed a university degree
- ☐ 9 Completed a post-graduate degree
- ☐ 10 Other (specify)

3.3 Staff Benefits

3.3.1 Are you/your business able to provide employees with any benefits? If yes, indicate which of the following:

- ☐ 1 Pension/Provident Fund
- ☐ 2 Savings Plan
- ☐ 3 Unemployment Insurance Fund
- ☐ 4 Medical Aid
- ☐ 5 Hospital Plan
- ☐ 6 none of the above

3.3.2 If not, indicate which of the following most accurately describes why this is the case:

- ☐ 1 too costly
- ☐ 2 makes more sense for employees to make their own decisions on benefits in relation to their needs
- ☐ 3 not aware of such benefit schemes

4. Funding

4,1 During the last three years have you APPLIED FOR funding from a governmental or private source?

- ☐ 1 Yes
- ☐ 2 No

4,2 If NO, what was the MAIN reason for not applying for funding? (choose ONE and then go to 4.6.1)

- ☐ 1 No experience in writing proposals
- ☐ 2 My writing skills are poor
- ☐ 3 It is pointless, I would fail to get it
- ☐ 4 the available grants are inadequate for my needs
- ☐ 5 It depends on whom you know
- ☐ 6 Admin compliance requirements of funders
- ☐ 7 No need
- ☐ 8 Other (specify)

4,3 If YES, which of the following have you applied to?:

- ☐ 1 National Arts Council
- ☐ 2 National Lottery
- ☐ 3 Department of Arts and Culture
- ☐ 4 Provincial government
- ☐ 5 Local government
- ☐ 6 Business Arts South Africa
- ☐ 7 Arts and Culture Trust
- ☐ 8 International Funding Body
- ☐ 9 Private Foundation
- ☐ 10 Corporate sponsorship
- ☐ 11 Corporate funding

- ☐ 12 Patron
- ☐ 13 Arts organisation

4,4 Did you receive funding from any of these sources?

- ☐ 1 National Arts Council
- ☐ 2 National Lottery
- ☐ 3 Department of Arts and Culture
- ☐ 4 Provincial government
- ☐ 5 Local government
- ☐ 6 Business Arts South Africa
- ☐ 7 Arts and Culture Trust
- ☐ 8 International Funding Body (eg Pro Helvetia, Goethe Institute, Cultures France)
- ☐ 9 Private Foundation
- ☐ 10 Corporate sponsorship
- ☐ 11 Corporate funding
- ☐ 12 Patron
- ☐ 13 Arts organisation
- ☐ 14 Did not receive funding

4,5 Of those funding sources that you have applied to, which do you regard as being the MOST responsive to the needs of the

- ☐ 1 National Arts Council
- ☐ 2 National Lottery
- ☐ 3 National Government
- ☐ 4 Provincial Government
- ☐ 5 Local Government
- ☐ 6 Business Arts South Africa
- ☐ 7 Arts and Culture Trust
- ☐ 8 International Funding Body
- ☐ 9 Private Foundation
- ☐ 10 Corporate sponsorship
- ☐ 11 Corporate funding
- ☐ 12 Patron
- ☐ 13 Arts organisation

4.6.1 What do you regard as the MOST important purpose for arts funding in general?

- ☐ 1 supporting artists to produce their creative work
- ☐ 2 promoting capacity-building and networking (workshops, conferences, courses, etc)
- ☐ 3 building new audiences (through for example art education programmes)
- ☐ 4 developing new markets
- ☐ 5 enabling international exposure and linkage for South African artists and/or galleries
- ☐ 6 developing new talent
- ☐ 7 broadening access to participation in the arts (eg art education programming)
- ☐ 8 subsidising innovative arts media
- ☐ 9 research

4.6.2 What do you regard as the SECOND MOST important purpose for arts funding in general?

- ☐ 1 supporting artists to produce their creative work
- ☐ 2 promoting capacity-building and networking (workshops, conferences, courses, etc)
- ☐ 3 building new audiences (through for example art education programmes)
- ☐ 4 developing new markets
- ☐ 5 enabling international exposure and linkage for South African artists and/or galleries

- ☐ 6 developing new talent
- ☐ 7 broadening access to participation in the arts (eg art education programming)
- ☐ 8 subsidising innovative arts media
- ☐ 9 research

4,7 Have you applied for loan finance related to your business/work from a bank during the course of the last three years?

- ☐ 1 Yes
- ☐ 2 No

4,8 If NO, what was the reason for not applying?

- ☐ 1 No need for loan finance
- ☐ 2 No experience in dealing with banks
- ☐ 3 It is pointless, I would fail to get it
- ☐ 4 It depends on whom you know
- ☐ 5 Admin compliance requirements of banks
- ☐ 6 Other (specify)

4,9 If YES, was your application successful?

- ☐ 1 Yes
- ☐ 2 No

4.10 During the course of the last three years, have you obtained a loan from an informal source such a money-lender, friend or

- ☐ 1 Yes
- ☐ 2 No

5. Business Position and Market-related Issues

5,1 Do you have to spend time engaged in work/business outside of the visual arts to sustain your work/business in the visual arts sector?

- ☐ 1 Yes
- ☐ 2 No

5,2 If yes, why are you involved in other activities to support your "creative" activity (choose one or more)?

- ☐ 1 Cross subsidy
- ☐ 2 Visual arts market too small
- ☐ 3 Risk reduction/diversification
- ☐ 4 Business expansion
- ☐ 5 Other (specify)

5,3 How would you describe the location of your work/business? (choose ONE)

- ☐ 1 Urban – Major City - Suburban/CBD
- ☐ 2 Urban – Major City - Township
- ☐ 3 Urban - town
- ☐ 4 Semi rural, small town
- ☐ 5 Deep rural/remote

5,4 How does your current location impact on your market access/ability to sell your products/services?

- ☐ 1 Positively
- ☐ 2 Negatively
- ☐ 3 Does not affect it at all

5,5 Are your products or services sold or delivered primarily.... (choose ONE)

- ☐ 1 directly to consumers/users?
- ☐ 2 to other businesses/organisations?
- ☐ 3 both equally

5.6.1 At the moment, the MOST important market for your products/services is....

- ☐ 1 local? (in your immediate locality)
- ☐ 2 regional? (beyond immediate locality, but not national in scope/reach)
- ☐ 3 national?
- ☐ 4 continental/African?
- ☐ 5 international?

5.6.2 At the moment, the SECOND MOST important market for your products/services is....

- ☐ 1 local? (in your immediate locality)
- ☐ 2 regional? (beyond immediate locality, but not national in scope/reach)
- ☐ 3 national?
- ☐ 4 continental/African?
- ☐ 5 international?

5,7 Do tourists form a significant part of your target market?

- ☐ 1 yes
- ☐ 2 no

5.8.1 Of the following which is the MOST important method of marketing/promoting your products/services?

- ☐ 1 The physical position/visibility of my business/organisation/institution
- ☐ 2 Networking and word of mouth
- ☐ 3 Through an on-line presence (e.g. website, mailouts)
- ☐ 4 Through local media
- ☐ 5 Through national media
- ☐ 6 Through international media
- ☐ 7 Other specify:.....

5.8.2 Of the following which is the SECOND MOST important method of marketing/promoting your products/services?

- ☐ 1 The physical position/visibility of my business/organisation/institution
- ☐ 2 Networking and word of mouth
- ☐ 3 Through an on-line presence (e.g. website, mailouts)
- ☐ 4 Through local media
- ☐ 5 Through national media
- ☐ 6 Through international media
- ☐ 7 Other specify:.....

5,9 How would you characterise the market for the products and services that you/your business provides?

- ☐ 1 healthy,growing
- ☐ 2 gradual improvement
- ☐ 3 stagnant
- ☐ 4 in decline
- ☐ 5 in sharp decline

5.10 Which of the following issues represent critical obstacles to the development of your work/business/organisation? Rank

	The high cost of...	
5.10.1	Materials and Supplies	
5.10.2	Space/Business premises	
5.10.3	Utilities (electricity, etc)	
5.10.4	Telecommunication	
5.10.5	Publicity	
5.10.6	Publishing	
5.10.7	Transport/freighting	
5.10.8	Legal advice	
5.10.9	Labour	
	Market Conditions	
5.10.10	Weaknesses in Supply of Product	
5.10.11	Weaknesses in Demand for Product	
5.10.12	Level of competition in the industry	
5.10.13	Exchange rate	
5.10.14	Tax rate	
5.10.15	Interest Rates	
5.10.16	Changing trends which influence demand	
	Lack of Access to...	
5.10.17	Skilled labour/workforce	
5.10.18	Finance	
5.10.19	Funding	
5.10.20	Raw Materials	
5.10.21	Business support/advice	
5.10.22	Marketing opportunities	
	Regulatory and industry environment	
5.10.23	SARS compliance	
5.10.24	Customs/trade regulations	
5.10.25	Labour regulations	
5.10.26	Business licensing requirements	
5.10.27	Lack of professionalism within the industry	
5.10.28	Lack of internal regulation within the industry	
5.10.29	Lack of industry promotion from government	
5.10.30	Issues related to the freedom of expression	
	Socio-economic conditions	
5.10.31	Crime	
5.10.32	Corruption	
5.10.33	Substance Abuse	
5.10.34	Race Discrimination	
5.10.35	Gender Discrimination	
5.10.36	Other (Please specify)...	

If you have ranked more than THREE of the above as 'major' (1) review these and decide which are the three most significant issues and assign the others as 'moderate'

5,11	How do you generally feel about your future in the sector?
	1 positive, there are lots of opportunities for growth
	2 positive, there are some opportunities for growth
	3 neutral
	4 negative, the outlook is bleak
	5 negative, I am or am considering looking for opportunities elsewhere

☐ 6 uncertain

5.12.1 What do you see as your MOST important need in terms of company development? (choose ONE)

- ☐ 1 Staff training
- ☐ 2 Help with strategy and business planning
- ☐ 3 Help with developing new ideas for cash generation
- ☐ 4 Help with improving processes and efficiency
- ☐ 5 Help with marketing
- ☐ 6 Help obtaining external commercial funding
- ☐ 7 Help obtaining external government funding
- ☐ 8 Help with international expansion
- ☐ 9 Increased web presence (marketing, distribution ...)
- ☐ 10 Other (specify)

5.12.2 What do you see as being your SECOND MOST important need in terms of company development? (choose ONE)

- ☐ 1 Staff training
- ☐ 2 Help with strategy and business planning
- ☐ 3 Help with developing new ideas for cash generation
- ☐ 4 Help with improving processes and efficiency
- ☐ 5 Help with marketing
- ☐ 6 Help obtaining external commercial funding
- ☐ 7 Help obtaining external government funding
- ☐ 8 Help with international expansion
- ☐ 9 Increased web presence (marketing, distribution ...)
- ☐ 10 Other (specify)

5.13 Are you a member of an industry organisation or association?

- ☐ 1 Yes
- ☐ 2 No

5.14 If NO, which of the following most accurately describes the reasons for not being a member?: (choose ONE)

- ☐ 1 Not interested in such bodies
- ☐ 2 Not aware of any industry bodies or associations in my sector
- ☐ 3 Don't believe any benefits attach to such membership for me/my company
- ☐ 4 Don't know what the benefits are

5.15 If YES, what do you see as being the most significant benefit that you obtain from such membership (choose ONE)

- ☐ 1 Information
- ☐ 2 Advice
- ☐ 3 Networking
- ☐ 4 Marketing Opportunities
- ☐ 5 Training/Professional Development
- ☐ 6 Access to funding opportunities
- ☐ 7 Peer Support
- ☐ 8 Other, specify.....

5.16 How do you use computers in your work? (multiple response)

- ☐ 1 Administration
- ☐ 2 Networking
- ☐ 3 Internet-based research
- ☐ 4 As a creative medium

- ☐ 5 On-line marketing/sales
- ☐ 6 Do not use computers
- ☐ 7 Other purpose, specify:

6. For Galleries only (and organisations with a gallery space) - others proceed to 7

6,1 What is the approximate size of your gallery?

m2

6,2 Is this space owned or rented?

- ☐ 1 owned
- ☐ 2 rented

6,3 What is the approximate monthly cost associated with the space (rental or mortgage/bond payment)?

monthly rental/bond payment #DIV/0! cost per m2

6,4 What proportion of artworks that you sell are sourced from... (indicate percentage)

- ☐ local artists?
- ☐ artists from other countries in Africa?
- ☐ international, outside of Africa?

6,5 What is the average price of artworks sold in your gallery? (choose ONE)

- ☐ 1 less than R1000
- ☐ 2 R1000 - R5000
- ☐ 3 R5000 - R20000
- ☐ 4 R20 000 - R50 000
- ☐ 5 R50 000 - R100 000
- ☐ 6 R100 000 - R250 000
- ☐ 7 more than R250 000

6,6 What commission and associated costs do you **generally** charge on the sale of work? (choose ONE)

- ☐ 1 no commission
- ☐ 2 0-10%
- ☐ 3 10-20%
- ☐ 4 20-30%
- ☐ 5 30-40%
- ☐ 6 40-50%
- ☐ 7 50-60%
- ☐ 8 60-70%
- ☐ 9 more than 70%

6,7 What kind/s of consumer/s does your gallery mainly target? (choose ONE)

- ☐ 1 low income earners
- ☐ 2 middle income earners
- ☐ 3 upper-middle income earners
- ☐ 4 high income earners
- ☐ 5 the very wealthy

6,8 What do you regard as the MOST important opportunity for making sales? (choose ONE)

- ☐ 1 exhibition openings
- ☐ 2 casual daytime visitors

- ☐ 3 special viewings
- ☐ 4 other, specify

6.9.1 What would you regard as the MOST significant constraint/challenge that you face as a gallerist?

- ☐ 1 insufficient/inadequate space
- ☐ 2 physical location of gallery
- ☐ 3 too much competition
- ☐ 4 poor levels of professionalism among artists
- ☐ 5 market downturn

6.9.2 What would you regard as the SECOND MOST significant constraint/challenge that you face as a gallerist?

- ☐ 1 insufficient/inadequate space
- ☐ 2 physical location of gallery
- ☐ 3 too much competition
- ☐ 4 poor levels of professionalism among artists
- ☐ 5 market downturn

7. Finances

7.1 Please indicate or estimate your total income (even very roughly) for the financial year ending in 2008
(you can also arrive at an estimate by answering 7.2)

(use simple numbers, without spaces, eg 90000, not R90 000)

7.2 Please estimate what amount or percentage of this annual income was earned through:

If amounts are indicated use column A, if percentages, column B

	A		B	
	amount	%	%	amount
Product Sales		#DIV/0!		0
Provision of Services		#DIV/0!		0
Income from royalties		#DIV/0!		0
Income from investments		#DIV/0!		0
Subletting space		#DIV/0!		0
Funding agency grant - local source		#DIV/0!		0
Funding agency grant - international source		#DIV/0!		0
Government grant (non arts funding agency)		#DIV/0!		0
Corporate Sponsorship		#DIV/0!		0
Other (specify)		#DIV/0!		0
Total should add up to figure indicated in 7.1		#DIV/0!	should equal 100%	

7.3 Do you expect your total income to be higher, lower or about the same this year? (single response)

- ☐ 1 higher
- ☐ 2 lower
- ☐ 3 about the same

7.4 Please indicate or estimate your total work/business related expenditure in the financial year ending in 2008
(you can also arrive at an estimate by answering 7.5)

(use simple numbers, without spaces, eg 90000, not R90 000)

7.5 Please estimate what amount of this expenditure was incurred through:

If amounts are indicated use column A, if percentages, column B

A

	amount	%		%	amount
Wages and salaries and related costs		#DIV/0!			0
Materials and Equipment	0	#DIV/0!			0
Publicity costs	0	#DIV/0!			0
Exhibition costs	0	#DIV/0!			0
Premises (rental or mortgage/bond)	0	#DIV/0!			0
Utilities costs and overheads	0	#DIV/0!			0
Communication costs	0	#DIV/0!			0
Travel costs	0	#DIV/0!			0
Transport and Freight	0	#DIV/0!			0
Insurance	0	#DIV/0!			0
Other (specify)		#DIV/0!			0
Total should add up to figure indicated in 7.4	0	#DIV/0!	should equal 100%		0

7,6 What is the estimated replacement value of your assets?

R

7,7 What is the estimated size of your debts/liabilities?

R

Tax/Insurance

7.8.1 Are you/your business entity registered for income or company tax?

- ☐ 1 Yes
☐ 2 No

7.8.1 If NO, why:

- ☐ 1 Income/company tax does not apply to my organisation type
☐ 2 Not aware of tax issues
☐ 3 I think I earn too little to pay income tax
☐ 4 Haven't found the time to address this
☐ 5 Fall below current income/company tax threshold
☐ 6 Too much trouble/administration
☐ 7 Other, specify:

7.9.1 Are you registered as a VAT vendor through SARS?

- ☐ 1 Yes
☐ 2 No

7.9.2 If not, why?

- ☐ 1 Don't know how VAT applies to my work/business
☐ 2 Not applicable to my tax/legal status
☐ 3 Fall below current taxable income threshold required for compliance (taxable income less than R1 million)
☐ 4 Too much trouble/administration

7.10 Have you ever taken out any of the following types of insurance *related to your business/work*?

- ☐ 1 Accident Insurance
☐ 2 Vehicle insurance
☐ 3 Travel insurance
☐ 4 Professional Indemnity insurance
☐ 5 Freight Insurance

7	Office/Studio Contents Insurance
8	none of the above

Appendix D: Provincial Reports

I. KZN Report

Prepared by Nontobeko Ntombela

Introduction

This report is intended to give an overview of the state of the KwaZulu-Natal visual arts sector analysing: artistic practice patterns of individual artists, private businesses, public organisations and governmental institutions. Examining the entrepreneurial and public finance support system for implementing provincial policies, this report has determined some of the influencing factors that contribute to the current state. Approaches towards the provinces engagement with other national and international organisations are also considered.

1. KZN: Sectorial SWOT analysis

Strength	Weaknesses	Opportunities	Threats
A nurturing industry that allows the space for artistic growth in a less competitive environment. Enough space for professional growth for both established and emerging artists Fine Arts courses promote high level conceptual work and has excelled in producing outstanding visual artists that receive internationally recognition. The Fine Art School has mastered traditional techniques and continues to contribute to the research development of art practices. A variety of different galleries that accommodate different arts. Public Institutions focused on social development and transformation particularly in the rural areas. Established Governmental infrastructural support through art centres as resource	Space for contemporary art practice is limited Less diversified racial make up of both artists and audience Conservative/limited audience and buying market Lack of media support for art exhibitions, events and projects. More particularly critical writing. Lack of networking/communication amongst artists Lack of communication mechanism between art institutions and government. Less focus on contemporary art practise for developing artists from government. Lack of collaboration between education institutions and government towards training and mentoring of developing artists.	Visual Arts has been identified by the provincial government as a focal area for development and support. Educating the art buyers, particularly the potentially new client based in the growing number of wealthy young black entrepreneurs and other buyers in general. Formalise co-operation between business, public and non profit organisations to form collective opportunities to attract buyers, in order to create and sustain provincial strategies and initiatives for proper communicative forum/collective networking. <i>Such opportunities could be: arts maps, tourist bus tours, training and development and funding mechanism</i> <i>The imagine Durban initiative by the city, VANSAs, Department of Arts and Culture forums are one of the initiatives could participate collaboratively in the</i>	Artists leave the province to gain better career profiles in other cities. Durban Galleries not making a sustainable profit. Low funding support from provincial government Unsustainable public initiatives because of lack of funding

centres. Growing focus on art in public spaces as an integral approach to social change.	Lack of provincial public funding support for contemporary practice	<i>restructuring.</i> Information distribution outlets for artists and support centres (mobile/electronic and physical spaces) that work collaboratively to share and create opportunities for artists. <i>Visual Arts Network South Africa (VANSA) KwaZulu-Natal in collaboration with KZN Art centre networks, Provincial Government, Economic Development and all the public Institutions as well as other arts collectives.</i> Develop Arts Node / cultural resource centres (mobile/physical) - studio space/ galleries/ art centre/ exhibition pavilion, etc. – for easy access to artists, development arts databases, web information on artists, and proper representation of artists in KZN. Sustaining Artists’ collaboratives – public space art projects, architectural integrated projects, continuation of RED EYE, sustainability of dala & other collectives.	

		Encourage rural projects and collaborations with developed artists. Mentorship programmes – with specific outcomes Gallerists to strengthen the attraction of art writing on KZN artists in bigger publications such Art South Africa. Artthrob and other international publications, etcetera.	

2. THE POSITION OF ARTISTS

2.1. Geographical clusters of visual artists within the province

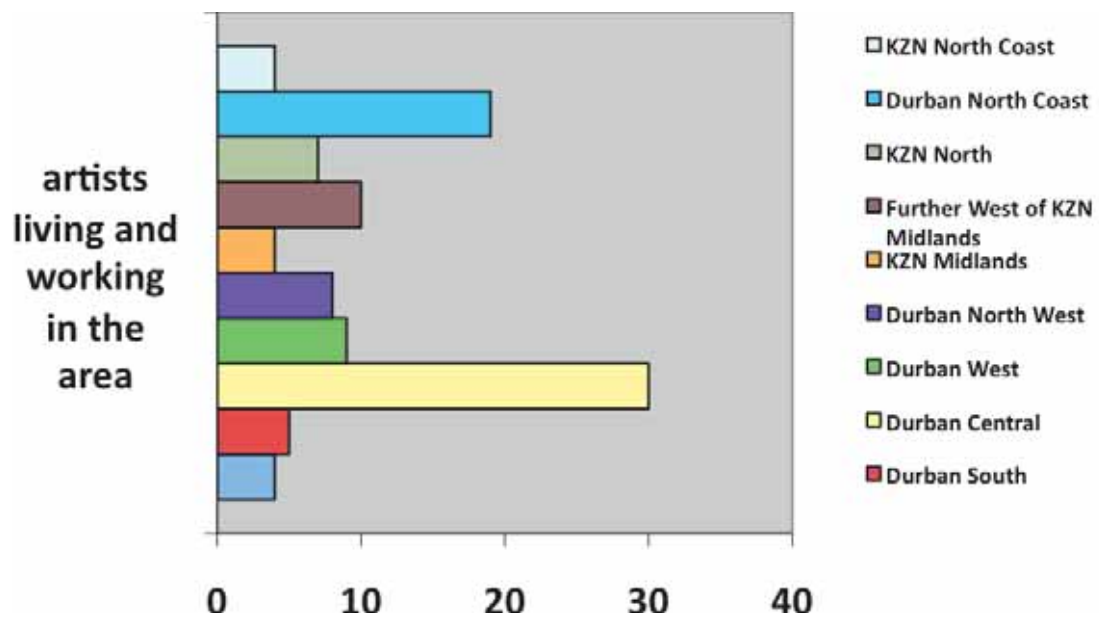


Diagram 1

Based on the database of artists collated, the above graph gives an indication of the areas where artists live and work. This is also based on region/town/city. With Durban Central leading, this includes suburban areas within the city. The following graph, on next page (diagram 2) gives more detail on specific places where these artists live and work.

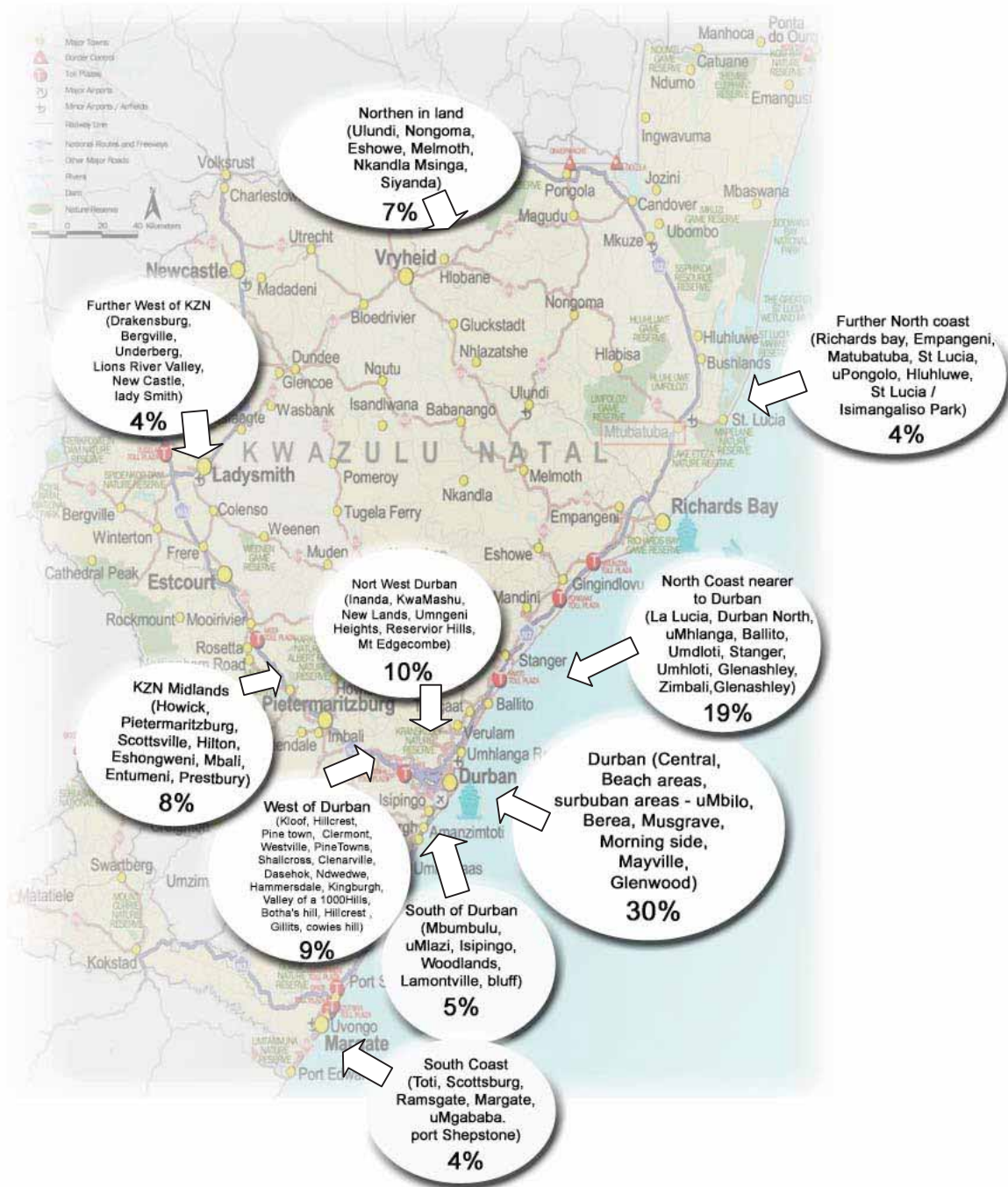
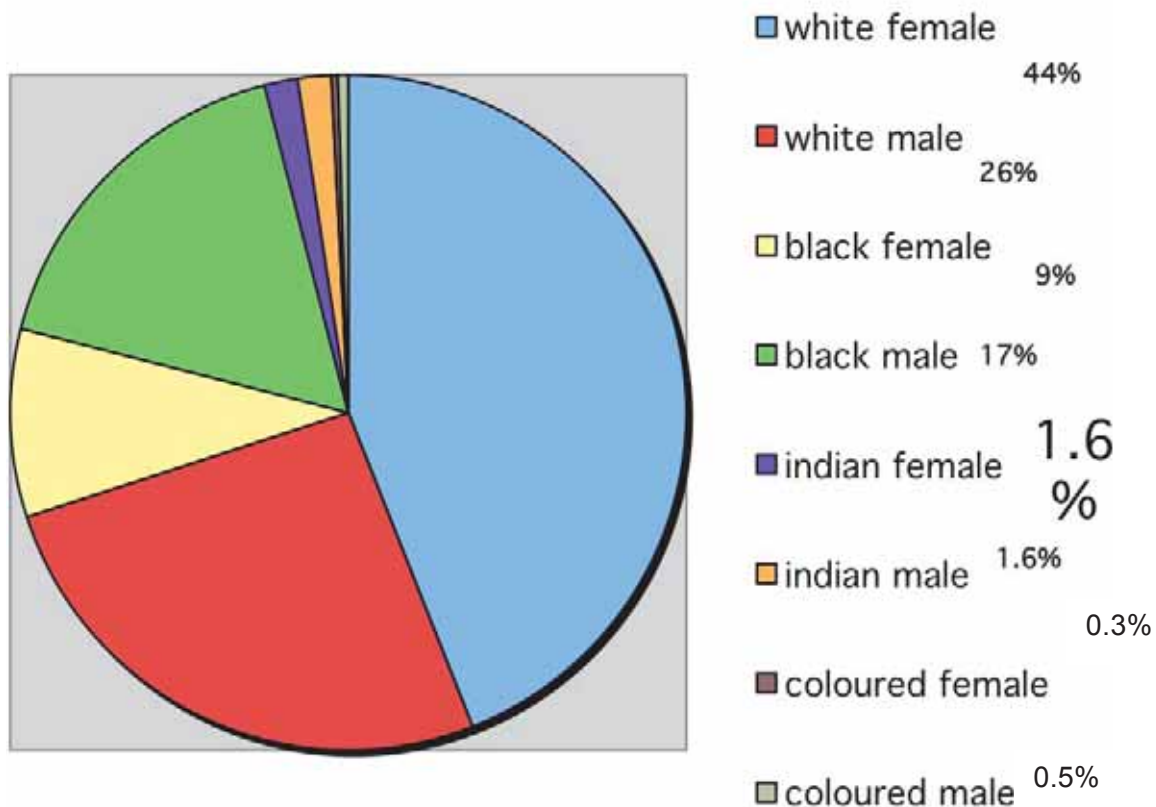


Diagram 2 (http://www.mtubamanor.co.za/images/KZN_Map.gif)

2.2 Gender and Race profile of Visual Artists living and working in the region.



These demographics are also sourced from the KwaZulu-Natal Artists' Database.

2.3 Patterns of work and income among artists.

Although KwaZulu-Natal's art scene can be described as a nurturing industry that allows for artistic growth in a less competitive environment, the lack of funding and buying market is limiting to a lot of artists that work and live in this province. Yet, these limits have opened other opportunities for creativity. Developing a distinctive difference, the art found in KZN is distinguishingly different to the art found in other parts of South Africa, as many artists explore geographic, socio-political and cultural issues associated with their immediate and personal reference.

But even with these unique approaches, artists are faced with a great challenge in pursuing their work as they sometimes do not generate sufficient income from artwork sales. With only a few galleries mainly in Durban that promote contemporary art practice, artists substitute their income through other means, such as; teaching, commissions, residencies, workshops, administration, etc, in order to support their artistic practice.

Some of the reasons why artists find other sources of income in KZN:

- Sales of artworks slow and sellable prices lower than other provinces (artists can not charge same prices of artwork sold in Cape Town and/or Johannesburg or it will not be easy to sell)
- Have to find funds to pay, email, internet and gallery visits in order to remain accessible and updated about galleries activities.
- In KZN funds for individual artists are limited - artists are only funded through registered Non-Profit organisations for monitoring and compliance with Public Finance Laws.
- Studio space rental is expensive
- When exhibiting, artists are required to cover gallery rental, exhibition cost and commission for artworks sold.

As a result, there are fewer artists that rely entirely on their work as a primary source of income. Artists who survive as fulltime artists have some of the following in their favour:

- Have working partners (the large number of women artists have supporting husbands)
- Commissions for public sculptures (need to be well networked and or easily accessible through gallery representation or websites)
- Do not only sell through Gallery exhibitions also sell work in art and craft shops
- Represented by a gallery outside of KwaZulu-Natal, mainly Johannesburg and Cape Town.
- Are well established and have large following of patrons.

With only a few art galleries which sell art as their only trading business, the number of artists capable of depending on art as their sole income is thus limited. This has also influenced the types of art businesses that artists choose to work with. Many of the galleries that are more profitable tend to trade as a combination of art shop and gallery. More and more galleries package their trade with other creative products such as jewellery, furniture, craft, etc. These galleries will also usually take in artworks that are more commercially based as this usually appeals more to their customers. These shops have established a more sustainable lively hood for artists and have created an expectancy of work that appeals to their consumer pattern. This also takes away the burden of artists paying for gallery rental, exhibition costs, etc., thus only paying the commission. The negative part about this structure of art selling is that artists usually do not get highly profiled in the art world (nationally and internationally). This also limits them in receiving recognition in the writing of art history because they are restricted to one particular audience and not presented in a broader context of art exhibitions. However, some artists have managed to overcome this challenge by working with both gallery shops as well contemporary art galleries.

Work patterns:

- Some artists after graduating in Fine Art abandon contemporary practice to produce sellable art that appeal to the KZN consumer.
- High influence of craft, as the craft industry has established a great pull of tourism in the province, thus increasing the tourism market. Tourism marketing gears toward a cultural aesthetic therefore influencing the art market to conform to this attraction. This also leads to some artists tailor making their work to attract this market.

Nevertheless, there are different degrees to how artists approach this challenge.

2.4. An outline of common problems that artists face in pursuing their work.

There are a large number of artists that leave the Province due to the lack of support infrastructure and market needs. Other factors constituted by this pattern are as follows:

- Contemporary arts practice and new/experimental approaches and media do not have a great general public following – only a selected percentage of the provinces' audience supports this kind of work, for example these types of exhibitions are found in Durban Central and surrounding galleries such as KZNSA, ArtSPACE Durban and sometimes Durban Art gallery.
- The galleries are poorly funded which means limited marketing exposure to buyers and other networks in the country and internationally
- There are fewer galleries in comparison to other cities in South Africa, which limits diversity and promotes gate keeping and control over artistic freedom.
- Buying market saturated by crafts
- Limited number of public art events, major art exhibitions and commissions
- Lack of critical reviews and writing in Art Magazine, which restricts the promotion of exhibitions and peer reviewing and appraisal.
- Some artists don't have email or internet access, and access to these facilities can be expensive.
- Often changing cell phone numbers, therefore inaccessible when exhibition or project opportunities are presented.
- Many artists live far from information centres, therefore not always updated with current information.
- Lack of fundraising skills of artists, meaning they fail to achieve support from funders due to weak proposals. Artists also failed access funding from the provincial and municipal government due to the PFMA funding structure. Refer to 2.3 (Individual artists cannot apply for any funding unless through an organisation that has an NPO status and usually these organisations are also bargaining for that same pool of funds for their own projects that align with their organisations' objectives. This also means for those organisations that fundraise for art projects, there is limited opportunity that can assist or engage with artists that require funding). This also contributes to the need of studio spaces, exhibition venues and art materials.
- Apart from municipal galleries, other galleries charge artists to exhibit, making it more difficult for artists, as they also have to consider the gallery expenses when exhibiting. This discourages many artists that produce work which is not necessarily sellable. This also restricts cultural diversity and contemporary art practice experimentations as a way of engaging the general public. Playing a contributing factor to the kind of work that artists produce.

3. THE MARKET

3.1 Areas of market concentration across the province:

Gallery Clusters	South Coast (Port Shepstone) Durban (Central only the municipal galleries and BAT Centre, Morning Side, Berea, Glenwood, Umhlanga, Ballito, La Lucia, Kloof/Hillcrest) KZN Midlands(Howick, Pietermaritzburg, Scottsville, Hilton, New Castle, Lady Smith) Northern in land (Eshowe, Melmoth, Empangeni, Richard Bay)
Art routes	VANSA has initiated an Art Bus which travels to ten Durban Galleries funded as part of the Heritage Festival this bus goes to KZNSA, Durban University of Technology Art Gallery, BAT Centre And Art for Humanity, Durban Art Gallery, Artisan Contemporary Gallery African Art Centre, Kizo Art Gallery, artSpace Durban, Mazisi Kunene <i>Arts Bus is Free of charge.</i>
Open Air Markets	I love Market (St Mary's Church Morning Side), Glenwood market, Essenwood market (Musgrave/Berea Area), Eshongweni Market There are also many other markets (Flee markets) that also include visual arts but not their main focus.
Festivals and events	Festivals Midlands Meander Arts Festival (PMB), Hilton Arts Festival, Heritage Festival (Kizo – Gateway Shopping Mall), Up Beat Festival (Kearsney College – Bothas Hill), Celebrate Durban , Events RED Eye, Moveable Arts Feast

3.2 A consideration of both the audience and consumer base for the visual arts in the province;

Whilst the contemporary art spaces have a greater challenge in selling fine artworks, galleries that fall between curio and art shop seem to be able to push fine art pieces off their shelves. It seems as though marketing a more diversified approach in selling commercial artworks works in the favour of these local galleries. Almost every viable arts gallery in this province has to be close to or has a café, art shop (selling small art items such as jewellery, decorative ornaments, small artworks, etc.) or usually hosts shows that are very commercially based.

The most viable client of this province is tourists and locals but this client base is usually restricted by either size or prices of the artworks. Therefore, installation based pieces are rarely bought by private individuals. The only places that seem to achieve selling expensive pieces artworks are shopping mall based galleries, because of the convenience of parking and variety of shopping in one place. This means that the more wealthy clients will be more attracted to buying from a

gallery in a mall and the marketing/advertising of these galleries is already provided by the mall. Not to say that all wealthy clients buy only from gallery mall, the small amount of Durban art collectors still go to the contemporary art galleries that are situated outside of malls.

International Clients

In order to evaluate international selling of visual arts in KZN one has to establish who these clients are, what type of work is being bought and where are these artwork selling from. The closest links are mainly tied to tourism and a few galleries selling artwork to international clients, sometimes through galleries in Johannesburg and Cape Town. It is mainly through tourist attraction, that artworks are sold to the international markets directly from this province. The challenge to this is that these are not necessarily sustainable clients due to the unpredictability of the tourist market. Only one gallery has another international outlet (ArtSPACE Durban's Berlin branch), that has been recently opened in 2007. However, the looming boom of the 2010 tourists influx will be perhaps be a pick-up factor of any future sustainability of the tourism sector in the province.

The decline of tourism in Durban (early in 2004/6/7 reference to Tourism KZN statistics) has also crippled many arts businesses that were reliant on the tourists as their main client base. For example, the BAT centre saw many of their shops, restaurants and galleries move from the centre because of drop of tourist visits to the centre - the BAYside (now called Artisan – moved from BAT Centre, central Durban to Florida Road) gallery and the BAT shop moved from the BAT Centre to Morning Side Durban. The African Art Centre also relocated from the city centre with the intention to build up the local client base as the tourism decline threatened closure of the business that has been operating on tourist based profit since the 90's. Many other businesses also moved from the centre. In the last five years these businesses have had to re-strategise their marketing to attract more local buyers. Both African Art Centre and Artisan moved from Durban Central to be in a more residential area (a newly developed Shopping and Restaurant Street) in order to pursue this local buying market.

Tourism statistics

<http://wwwz.southafrica.net/satourism/research/viewResearchDetail.cfm?ReportTypeCategoryID=63>

The report on this site indicates a progressive increase of visitors from 1990 (the time of the release of Mandela from Prison and the attraction of sporting events). In 2006 KwaZulu Natal particularly saw a decline inflow of travellers. By this year the African Art Centre was already considering moving because of the progressive drop in sale for over two years even though they were at the time located at the Tourism building, 1st floor in Central Durban. Over and above the decline on tourists' sales, issues of safety and parking in Durban Central became a huge obstacle as many of the locals did not come to Durban CBD unlike the past. A move to relocate to Florida Road was therefore taken in 2006. With similar reasons the BAY Side Gallery also relocated to Florida Road. Another added influence for the BAT Centre's tourism downfall was the new Harbour Laws that made the centre in accessible with the fencing and boom gate, chasing away also a lot of local visitors.

Museum Collection Patterns

In the last 15 years the museum-gallery buying budget has either ceased, or has been cut down annually, or exists only through fundraising. This has meant that the support for fine art buying and showcasing from museums and collection has experienced a rapid decline. The gallery/museum collections are no longer a good reflection of current practices in the art sector

and the dependency of galleries or museum gallery sales has correspondingly diminished.

It is therefore important to note that the following about the KZN arts trading;

- The KZN client base is conservative, for example most common sales are of work of aesthetical appeal more than conceptually based, - paintings, prints, and handmade sculptures/craft piece, whilst no sales of new experimental media such as video, installation art, conceptual work, etc.
- The location of galleries is important for the profitability of gallery businesses; it is not often that a client searches for other galleries that are not within their residential area, particularly to attend openings. e.g. not a lot of people who live in Durban travel to openings in Pietermaritzburg.
- The museum or public art gallery buying support is now non existent, buying funds are usually fundraised for or further cut, or not increased annually.

Case Study

The Bank Gallery opened October 2007 and early this year it announced changes in its services, no longer hosting monthly contemporary exhibitions. The foundation of this gallery was initiated as a need to broaden contemporary arts spaces in Durban. However the struggle to maintaining space without funding (PMFA Act funding grants are only given to Not for Profit Organisations) and limited number of contemporary art buyers forced closure for this gallery. Whilst there is great need for more contemporary spaces in Durban the question lies on the reception of the Durban's audience and market. In this case it is not geographic location of the gallery (it is well place in Florida – one of the most popular shopping streets in Durban) that is problematic, but services content that seems to make such a business unsustainable in Durban. Many of the other spaces in Durban that have managed to sustain themselves is through 'what they sell' and the composition structure of the business i.e. NGO, not for profit, etc.

For new arts business initiatives to survive, they have to think of new approaches by looking at already successful models and finding new ways of broadening the existing audience thus expanding new markets. Two successful art business that seem to be using a working model are *Arts Space Durban (ASD)* and *Kizo (trading as Craig Marks Galleries CMD)*, both have two or more art galleries in the same city which suggests that the art market of this province can be viable, if approached with a well-honed marketing strategy.

Commons to both businesses:

- both have galleries in and outside the city, ASD in Kloof and CMD in uMhlanga and Gateway shopping Mall
- Both sell a mix of highly commercial and more "fine art" artists
- target audience is wealthy Kloof and uMhlanga area residents
- Aiming for the 2010 profit opportunity, CMD has been awarded the arts trading licence for the FIFA World Cup and ASD gallery is in the close vicinity of the Moses Mabida Stadium (this however does not mean that they are the only two galleries that are targeting the 2010 business opportunities)
- both are targeting corporate, government and private sales

Differences:

- ArtSPACE Durban galleries are all positioned at street shopping areas and CMD galleries are all

- found in shopping malls.
- CMD successful in receiving government sponsorship for large public events. ASD has not organised a large public event, but opened a new gallery in Berlin, Germany.

The geographic location of galleries also plays a key influence on what kind of work you see exhibited in galleries and the kinds of art buyers that buy from that area. Galleries that rely on local buyers are based more in the suburban areas, where else the galleries that target tourists are located in tourist targeted areas usually the CBD/tourist destinations. Refer to graph 2 (the map), the only fine art based galleries are found in Durban Central (usual just out side the main CBD) this also indicates where artists live and work. Artists also mobilise themselves to provide services to those galleries that are closer to where they live and work. Durban as a hub will also consist of a larger range of the different types of art galleries. As many people have moved out of the city because of the many residential area developments, the shopping areas are also part of this development. This then means that galleries also follow the local market to make themselves accessible.

4 EDUCATION AND TRAINING

4.1 Art Training Service Providers:

Arts Education	Service providers
Tertiary level: Bachelor's Degree in Fine Art Bachelor's Degree in Arts an Culture Masters Degree and PHD Art History	○ University of KwaZulu-Natal, Fine Arts Programme, Pietermaritzburg ○ Durban University of Technology, Fine Art Programme, Durban ○ University of Zululand, Arts and Culture Programme, KwaDlangezwa
SETA Base training DACT skill Development Programme Arts Administration	Service Provider: KIA Karen Isaacs and Associates
Unaccredited Visual Arts Training	Visual Arts Programmes run by all provincial Art Centres Saturday Classes run by Durban Art Gallery and Tatham Art Gallery and many other Municipal Galleries or Museums Private studio tutoring e.g. Jane du Rand Mosaic Studio, Pascale Chandler art classes, Dina Comick sculpture workshop, Peter Ripon painting classes, etc.

Government Programmes:

Mentorship Programme: With the new focus on developing visual artists by the Department of Arts and Culture, they have developed a Visual Arts Mentoring Programmes. The object of this project is to provide developing (particularly self taught) artists, an opportunity to get critiqued and assisted in the development of their own work. This was also aimed at creating networks or channels that these artists may use to gain access to the art industry. Ideally mentors would have had the responsibility to introduce these artists to the existing networks and avenues that will give them opportunities.

The challenges to this programme are

- Great responsibility and expectation for the mentors
- Not all the trainees will receive equal opportunities, there is no mentor training so depending of the mentor's network and knowledge the trainee will only be exposed to only what their respective mentor knows.

The programme was due to start in 2009 however it has not been implemented due to the lack of interest expressed from the call for application of mentors and other internal reasons.

Arts and Culture learnership: there is great need for trained arts administrators. In 2005 MAPPPSeta introduced the Art and Culture Learnership with the intention to begin bridging this gap and fulfil the need for formal arts administrative training. This is currently not provided by the existing arts courses in tertiary level, hence creating a gap in the industry needs. This learnership has later been implemented through the Department as part of development programmes

Problems about this learnership:

- Learners become learnership dependants. It has been discovered that learners jump one learnership to the next because of the stipend factor and not because they value the training offered.
- Because of the level of this qualification, many of the applicants get attracted by need to be occupied as they usually do not have the means to pursue tertiary education as the entry level is matric NQF level 4. At this level many of the learners are still considering their field of interest and may have just tried their luck with the learnership programme.
- It was only the 2005 – 6 programme (training provided by KIA Karen Isaacs and Associates) that had majority of the learners that were already employed in art organisation. In recent years the department has had to find job placement for the duration of the programme which defeats the original of objective of learnership (learning while working), if these are not fulltime employments. This also creates great expectation to the learners about the possibility of employment at the end of the programme and later disappointment.

Whilst many of these problems are failing to be addressed, there are many other problems that affect these skills development programmes. This programme was initiated out of a serious need, and where there this has been accomplished through learnership, remains to be seen. It would have been ideal if these programmes were implemented or run by tertiary art schools to have avoided the many problems that have now arisen. Future co-operating between Setas, Government and educational institutions could address these industry needs in a more efficient way.

With this in mind the Durban University of Technology is currently developing the *Creative Industry Bachelors Degree*, as an attempt to fulfil this existing need.

Rationale

The South African economy needs talented, highly trained professionals in the areas of Arts, Design and Media to develop the great potential of these sectors to establish self-sustaining enterprises that will - in turn - create wealth, and open up work opportunities for the untapped reserve of creative talent in our communities.

Job opportunities are increasing in the performing arts; architecture and interior design; journalism and publishing; visual arts and design; film, television and radio; software and digital content. These new job openings are fuelled by an economy characterised by a growing export industry in goods and services, and tourism. The Bachelor of Creative Industries degree aims to develop smart, top-notch creative managers in the visual arts, advertising and entertainment, and to support this growth trajectory.

4.2 Art education history and the future

In order to understand the nature of the current arts education, particularly in KwaZulu Natal, you have to understand the history of South Africa. KwaZulu – Natal is one of the provinces that have always been hard hit by high levels of illiteracy, mining immigration and separation of families, HIV and Aids, etc. Craft in many respects has been pivotal in the therapeutic recovery of the devastating economy of this province. Notwithstanding the high unemployment rate and decline in the manufacturing industry.

Craft has a long history in this province as result of the constructed education system that perpetuated craft based education. In 1948 the National Party Government began eliminating the remaining integrated areas and segregated land for state power to ensure that black people would be policed into obedience, the Group areas act was adopted in 1949. In 1950, Arts and Craft was introduced as a subject in the Bantu School Education, to support the use of fibre (basketry, sewing and knitting) woodcarving and clay in under resourced conditions, as a way of preparing subordinate labourers. KwaZulu-Natal's rural communities were hard hit by the apartheid ruling government in land segregation and mining. Many of the women of these areas resorted to craft as a source of income. This also meant that younger children were exposed to craft or handwork at a young age. Even through some art training interventions had been established in 70's and early 80's such as the Rorkes Drift Art Centre, formal art training was not offered to black artists.

The huge imbalances of this education system created a void in the tertiary level arts training. Whilst many artists who could not afford to go to tertiary to further their artistic training, the tourism sector and changes in the public gallery acquisition's policies and change in the political landscape also perpetuated the lack of need for formal training for these artists. Many of the self taught artists earned their income from selling their works to places such as the art centres, door to door or on highways to travelling tourists. This deepened the separation between 'tourist' art and 'fine' art. Furthermore it has also contributed to separation between the highly commercial and contemporary/ fine arts. It was only in the late 80's and early 90's that black artists were allowed to enter into tertiary education to further their artistic career, but this also created a problem because of the absence of arts training at many government high schools. This has in the past increased the number of black students dropping out of art at a tertiary level. The need for such qualifications if these artists can still earn an income as 'self taught'

artists is questionable. The strict definitions of what is and is not 'fine art' became blurred, as many of these self taught artists exhibited in galleries and were therefore considered fine artists - examples include, Trevor Makhoba, George Msimango, Paul Sibisi, Thami Jali and many others. Over the years there has however been a huge shift to arts training with larger entry of black learners in art schools. This is now balancing the past education divisions with a growing number of qualified black artists meaning that the participating of black artists in the art world will hopefully be based on similar and fair grounds as that of white artists.

The government acknowledges these challenges in art education and has therefore introduced art in many government schools. This then hopefully means that these skills gaps will slowly diminish and art development opportunities will begin to be addressed more fairly in future.

5. DEVELOPMENT INITIATIVES

Referring to 4.1 with regards to the government initiative for developing artists in the province the Mentoring Programme and Learnships have been a step forward for local government to offer support to developing artists.

Other Significant Initiatives in the province

RED eye:

Previously, a quarterly art event that pulled many of Durban's young art followers was sadly stopped due to the lack of funding. It recently made a come back as part of the Celebrate Durban Heritage Projects 2009 and managed to retrieve its followers to the maximum. The need for such activities in Durban is there and this funding support from the city signifies their acknowledgement for such a need. This project should also be one of DACT funded projects. It is possible to assume that the local government's impression or outlook on visual arts is not seen in same light of needing developmental support. The Durban Art gallery as a public institution is unable to manage such a project on its own and this could be an opportunity for DACT to collaborate with DAG.

Arts Bus and Art Map:

As an attempt to making Durban Galleries more accessible a collaborative between VANSA and DAG initiated the arts bus as part of the Celebrate Durban Programmes. Started in 2008 this initiative has given the public immediate and free access to 8 galleries in the city. Proving to be a successful project (with Johannesburg Municipality also wishing to implement a similar project), in order to expand this project for more public support, the route needs to extend to other galleries outside the towns that have a much denser cluster of galleries such as Pietermaritzburg. However with only two years of successful programmes, it still yet to be seen if this project can be sustained in the future.

The Arts Map has not moved since its first attempt by ArtSpace Durban in 2004. Galleries in Durban are battling to remain afloat and tend to close doors to any advertising costs. VANSA in the last two years has tried to intervene in order to help galleries source funding to do the arts Map. The project is now currently run by the Municipal Architecture Department with hope that it will be implemented this year.

VANSA KZN as a neutral body has a major role in networking artists, arts initiatives and organisations particularly in the province where art is largely under supported. The great challenge for this body is operational infrastructure, often identified by its own committee as a limitation. The Body has also in the last 3 years lost visibility in the industry and has to date achieved very little acknowledgement from artists and organisations. This also means that its responsibility to represent the arts of this province have been done minimally. That being the Arts BUS, Moveable Arts Feast and Map. Unlike VANSA KZN there seems to be a growth with other arts groups and networks such as the ceramicists' society, water colour society and different arts groups that seem to have a consisted update and monitoring systems with their members and collective representation of the societies as a gain to their members, such as their annual member exhibition.

6. GOVERNMENT

Provincial Funding available for organisations in KZN

Funding body	Availability	Fund conditions
DACT Grant in Aid Funding	Application calls - opens in September	Funds to be use by April the following year
Celebrate Durban – Durban Municipality	Application circle opens in February,	funds are only to used for the Celebrate Durban projects - Month September

The DACT Grant in Aid Funding gives maximum funds of R50 000 to an organisation, meaning that in most cases it is inadequate to fund one project. The anomaly of the fund call for application also does not encourage many organisations to apply, as September (being their month for call of applications) is already towards the end of the year. Many organisations will put in applications for projects that are short term and not necessarily part of their main project or additional project funding for project that they are currently running. This Grant is perceived to favour craft based initiatives and art centre projects and this impression has discouraged visual arts organisations from applying

Celebrate Durban seems to be only source of contemporary project funding in KZN, although limiting as to when the money can be used and the angle to which the project should take (favouring the Celebrate Durban objective) it is the only project fund that has supported contemporary practice in the city of Durban (provincially).

The majority of the organisations in KZN source their funding from national and international organisations. The provincial government has been highly criticised for distributing funds to commercial art businesses, neglecting non-profit organisations and using no transparent processes (accountability procedures PMFA is in question) of awarding projects/services or funds to these businesses. Activities such as, the Heritage Festival that is supported by DACT as one of the sponsors. The 2009 Heritage awards were run by KIZO Arts Consultancy, the tender given by the Office of the Premier, and no public call was ever made for other organisations to submit applications.

African Renaissance Conference: is one of the KZN provincial Government's initiatives aimed at creating networking opportunities to discuss problems that are faced by the sector. What has since developed with this conference for the last 11 years is lack of follow-up of any issues that have been raised. As political leadership changes, so do the office bearers, and nothing is ever followed up. Started in 1999 at the ICC Durban, the Conference started off within a highly academic environment, but received a great deal of criticism for discussing matters that affect grass roots level without any engagement with the actual affected recipients.

Attempting to address this gap, the conference attendance has now been overwhelmed with rural artists. Bussed in by the Department, the latest challenges that have arisen from this exercise are:

- The makeup of participants was still unbalanced, with a larger number of artists and crafters. Topic discussed related more to people who were in administrative jobs and it was felt that many of the artists there could not understand some of the challenges and issues raised in these discussion because these were for people running arts organisations and projects. It was only those artists that are in administrative jobs or are running projects, could gain ideas and advise from presentations. The needs of individual artists were limited.
- The language of communication used was English – Many of the participants complained that they misunderstood most of the discussions taking place because of the language barrier.
- The conference structure has become dictatorial – less focus of small group discussions and shorter time for questions (some presenter left before Q & A session) and many of the participants questioned the process of selecting presenters; it has also become a forum for promoting selected businesses/projects/organisations.
- The needs of grass roots level artists are still not addressed.
- No attendances from local visual artists, the majority of the attendees are rural based developing artists, and mostly crafters.
- Has only become a forum for black arts and craft practitioners, yet the presenting panel is usually organisations that work with all races.

DACT Cluster Forums

Identifying the need to address the communication gap between government and visual artists, DACT has developed cluster forums that are intended to allow regional representative of the different clusters and arts disciplines to table issues related to arts practices in the sector. Implemented since 2007, meetings are called inconsistently, the meeting agenda only consist of DACT announcements but does not give opportunity to engage these representatives on what current issues affect their practice.

7. POLICY RECOMMENDATIONS

The disproportionate support for the arts from DACT has received criticism about their lack of understanding of the two disciplines, Craft and Visual Arts.

This has led to the new study or revisit to the White Paper on Arts and Culture. This document is still undergoing further research, therefore should be evaluated on the concluded findings.

A new policy (drafted and proposed this year – it is still in circulation for support and to be accepted by the DACT) on Policy for Payment(s) of Artists, performers and/or Individuals Participating in Departmental Event, was also stimulated by the criticism from the visual arts sector about the policy structures of the Department. Aimed at addressing the issue of the payment for visual artists that often get invited to adjudicate, exhibit and contribute on departmental projects with no remuneration. This was to formulate a guide that sets equal levels for payment support for all the arts.

As the government slowly identifies their internal working structure, it is hoped they will include strategies that seek to support a more inclusive approach for visual arts.

RECOMMENDATIONS

Throughout this document I have suggested some recommendations - refer to headings discussed - to which they could be used as way to solving the problem identified. In addition I would also like to highlight a few more solutions regarding some of the issues raised in this document:

- With organisations such as PANSA, KZNSA, VANSa, SAVAH, Ceramics Society, etc, in order to gain support from government there needs to be a collaborative strategy with a memorandum of agreement.
- A guide for artists' and resource centre is also a gap that could be developed to assist young artists leaving educational system/completing their degrees, artists working independently and collaboratives – so that there is a resource or reference that contains information where artists could be assisted. This could also be a national programme.
- Issues around copyright could also be brought into a discussion in resource abovementioned.

Other suggestions have been included in the SWOT analysis at the beginning of this document.

addendum 1

KZN Department of Arts, Culture and Tourism (DACT)

Policy for Payment(s) of Artists, performers and/or Individuals Participating in Departmental Events.

extracts

CATEGORIES OF PAYMENTS (S)

CATERGORY	Remuneration *(Payment per event)
Professional Artists	R 25 000.00
Emerging Artists	R 15 000.00
Developing Artists	R 5 000.00
Exhibiting Crafters and Visual Artists	R 5 000.00
Adjudicators	R 1 500.00
Recorders/adjudicators' assistants	R 1 000.00
Mentors	R 5 000.00 per six (6) sessions
Assessors	R 2 500.00
Moderators	R 3 500.00
Professional Programme Directors	R 20 000.00
Emerging Programme Directors	R 10 000.00
Developing Programme Directors	R 5 000.00
Cultural Experts/Informants	R 5 000.00
Winners of Literature Writing Competitions at a Provincial Level ○ 1 st ○ 2 nd ○ 3 rd	 R 5 000.00 R 3 000.00 R 2 000.00
Winners of Music, Song and Dance Competitions at a District Level	

○ 1st ○ 2nd ○ 3rd	R 3 000.00 R 2 000.00 R 1 000.00
Winners of any Departmental Commissioned Competitions at a District Level ○ 1st ○ 2nd ○ 3rd	R 3 000.00 R 2 000.00 R 1 000.00
Winners of any Departmental Commissioned Competitions at a Provincial Level ○ 1st ○ 2nd ○ 3rd	R 5 000.00 R 3 000.00 R 2 000.00

Selected definitions relevant to the information provided above:

‘Artist/s’ means a practitioner/s who is actively engaged in one or more arts disciplines.

‘Developing Artists, Performers and/or Individuals’ refers to an on going elementary process of **auditioning or selection** through competitions or any other alternative method of **identification, development and promotion** with the ultimate intention of undergoing through a training, development and/or mentorship programme for rendering artistic/cultural activities or services in the field of arts, culture and heritage through performance, exhibition and/or presentation, This particular definition is also applicable to Developing Programme Directors. This definition is used as **‘interim definition’** whilst DACT with other relevant stakeholders work on producing or defining a systematic approach of rating or grading artists/performers and/or individuals accordingly.

‘Emerging Artist/s, Performers and/or Individuals’ refers to a credible evidence of participating or undergoing through at least a six (6) month Departmental, Setas/QUCTO or any DACT recognised training, development and/or mentorship, programmes with the ultimate intention or rendering artistic/cultural or services at a professional level in the field of arts, culture and heritage performance, exhibition and/or presentation. This particular definition is also applicable to Emerging Programmes Directors. This definition is used as an **‘interim definition’** whilst DACT with other relevant stakeholders work on producing or defining a systematic approach of rating or grading artists/performers and/or individuals accordingly.

II. Eastern Cape Report

Prepared by Michael Barry

Disclaimer

The information in this report is based on the responses from questions provided by HSRC. Included are insights and opinions accumulated through interactions and discussions with artists living within the major art clusters in the Eastern Cape. It is a personal interpretation and analysis of the Visual Art sector in the Eastern Cape based on the experiences and interactions of the researcher over the past decade.

Methodology utilised by the researcher

Face to face interviews with and written responses from Art Galleries, Educational Institutions, Art projects and individual artists were conducted over a period of time. Informant information from a wide range of sources across the Eastern Cape, e.g. ECPACC Visual art representative Prof Dominic Thorburn, DSRAC Provincial Visual Art and Craft deputy director Ms Jen Rowland, independent researcher Lisa Van Wyk, Academic Institutions such as NMMU , WSU , Rhodes and Fort Hare , NGO's such as Arts and Teaching Initiatives (ATI) and professional artists living and working in the Eastern Cape This report is based on these responses and although all care and due diligence was paid to the process the report in no way claims to be scientific and objective.

Definition of 'Visual Artist'

For the purposes of the survey visual artists are defined as individuals that generate some portion of their income from the sale of their work or services in the context of a gallery or commissions. It may include craft artists – as long as this work is sold in a recognisable gallery context (this may be extended to interior design outlets).

Exclusion

It excludes crafters who sell their work through curio shops and by other means.

Introduction

Recent research undertaken by Cultures in Regeneration (CIR) show that the market for high and niche products in the Eastern Cape is small in comparison to the size of its population. This has relevance for the Visual art market (considered a niche market) and for visual artists in the Eastern Cape. Although the Eastern Cape is blessed with an abundance of artistic talents it does not have the economic capacity to support these artists. Only a few artists are able to ply their trade here with a reasonable level of sustainability and even these are forced to sell their works to markets beyond the boundaries of the Eastern Cape.

Realistically it is only the high end LSM residents of Nelson Mandela Bay (and to lesser extent residents in the East London metro) who are able to support and grow a commercial gallery sector in the Province. In order for this sector to survive and grow it needs to tie in with the existing high LSM residents and visiting (seasonal) markets along the coast (Port Alfred to Jeffries Bay) and inland into Grahamstown (considered by many to be the visual art cultural centre of the Eastern Cape)

Government intervention in the sector is restricted to Provincial Visual art exhibitions (seasonal), collections of Visual art located at the Bisho HQ of the Visual art and craft Sub directorate of the Department of Sport Recreation Arts and Culture (DSRAC), product development for 'disadvantaged artists', some gallery support to the De Beers Arts Gallery at Fort Hare and a Visual Art (craft) tent at the annual National arts festival in Grahamstown. Provincial Government (DSRAC) through its funding arm, the Eastern Cape Provincial Arts and Culture Council ECPACC, provides minimal funding and support to the Visual artists in the Province. Finally DSRAC has a draft policy which has been developed by the Visual Arts and Craft sub-directorate in consultation with its stakeholders. The policy will be implemented sometime in the future.

Visual artists of the Eastern Cape are obliged to supplement their income by working in art related industries such as teaching and NGO's consultancies whilst other less fortunate are forced or eke out a living selling their art to the tourist market or making the occasional sale to the more affluent art buyers. Very few Black artists are able to support themselves through their art activities while white artists find additional income from supplementary art related sources.

1. Overview:

The key features of visual art in the Eastern Cape are summarised within a SWOT analysis paradigm

Strengths

- Although the Province is essential Black (Xhosa and Sotho 85%) there is a diverse representation of visual artists from other race groups.
- According to the snap survey Visual art is evenly supported by both genders.
- Established artists have managed to market and promote their work on a local, nationally and international level.
- Several Higher and Further Education institutions offering art
- Growing tourist market
- Growing economy
- Talented pool of artists living within the Province producing high quality work in a variety of media from traditional to contemporary art.
- Government support although limited financially is able to provide a platform for Black artists through the local and Provincial departments
- Several Higher and Further Education institutions offering art
- Growing tourist market
- Growing economy
- Attractive retirement haven for monied classes
- Most white artists have links to formal education and are qualified within their field.

Weaknesses

- The local market is not a strong buying market especially for emerging artists; this is reflected in poor sales.
- Marketing and logistics take up too much of an artist's time; leaving very little time spent actually creating art.
- Not enough focus on art as a viable career option public need to be educated as to the important role artists play in society.

- Government schools without the support of Governing bodies do not have art programmes. Learners coming from disadvantaged schools do not have the opportunity to unleash their visual creative potential.
- The diversity and richness of our cultural heritage is not reflected sufficiently in education this is noted with the new National Certificate Vocation (NCV) as art has not been factored into the syllabus (there is a definite market for an Art NCV).
- Corporate and big business are not actively involved in supporting local artists.
- Lack of funding made available to artists or the incapacity to access funding from different organizations, i.e. ECCPAC, BASA, and ECDC.
- Insufficient funding from government for artists, art related projects and or initiatives.
- Government is focusing too much on re-dressing the past and does not realise that all artists are disadvantaged due to the nature of what they do. However in general it is the Black artists who are more disadvantaged than others.
- Limited art appreciation amongst the general public.
- Gallery's and exhibition spaces are in short supply and not all artists have access to these spaces or venues.
- Limited visual art agents representing the art community on a national and or international level.
- Minimal representation of visual artists living in O.R.Thambo, Ukhamlamba, Alfred Nzo and Chris Hani districts. Most artists living in these areas are associated with a more 'craft related product'
- The Fine Art Society in Queenstown has recently closed down due to lack of support.
- Closure of Buffalo City FET's Art Department in East London.
- The only Visual Art provider in East London is Walter Sisulu Fine Art Department.
- Tourism is not directly linked or actively involved in the art scene in East London.

Opportunities

- Extremely talented artists living and practicing within the area who are able to project manage large scale art projects, facilitate initiatives and start up collaborative studios. Although a lack of funding opportunities and a market are prohibitive factors.
- Tourism is a sector that is greatly underutilised and has the potential to be explored.
- The annual National Arts Festival is a boost for local artists, giving them direct access to national and international markets. Although this event has a limited time span it does afford local artists an opportunity to expose their works to a wider audience
- Corporate creative interventions and corporate collections is a market that has the potential to grow in this area.
- Exploitation of cultural diversity
- There is the potential of Government support through the local and Provincial departments
- 2010 and its legacy programmes
- Eastern Cape able to access the unique cultural values and traditions of the Province
- Local government has access to a diverse data base of artists offering the potential to create dynamic contemporary exhibitions that truly represent the province at the National Arts Festival.
- Arts and Culture can be more pro-active and support full time artists who are producing art to make a living.
- The development of art routes in the dense artist clusters such as the Hogsback area
- The development of a unique regional style
- Close formal cooperation with Local and Provincial government will provide opportunities for artists to express their needs and requirements in a more consistent and structured way

- Development of new markets

Threats

- Artists move out of the province to find more lucrative markets.
- Economic downturns instantly affect luxury markets such as art, particularly for up-and-coming artists who are, in the main, supported by middle-income buyers. The established artists it seems are usually collected as investments by the rich, who are less affected in the short-term by the market.
- Artists quit practicing art in search of financial security.
- High commissions of over 60% charged by most gallery's especially in the larger centres, which results in the work either being overpriced and hence hard to sell, or the artist having to accept substantially less than their work is worth. Although this is standard gallery practise it does have a prohibitive effect on art sales.
- Visual art is not promoted or given as much attention as other art forms such as dance, music and drama.
- A lot of focus is placed on the top 10 artists of South Africa, not enough attention is placed on the emerging artists that are trying to break into the market.
- The stigma attached to not making money from art needs to be broken.
- A lot of emphasis is placed on artists who have received their training from institutions like Wits, UCT etc.

2. The Position of Artists:

Visual artists (as per the definition) are mostly clustered in specific areas in the Eastern Cape.

These include:

- The Nelson Mandela Metropolitan (Nelson Mandela Metropolitan University) its immediate surroundings and areas as far afield as Humansdorp, St Francis, Jeffries bay and the Tsitsikama (situated on the border of the Eastern and Western Cape.
- The East London (Walter Sisulu University) and its surrounding areas as far afield as Queenstown
- Grahamstown Bathurst (Rhodes University) as far afield as Port Alfred
- Nieu Bethesda (Graaf Reniet area)
- Hogsback and Alice area (Fort Hare University)
- Scatterings of artists in rural areas such as Aliwal North, Lady Grey, Cradock and Burgersdorp
- Alfred Nzo, O.R. Tambo, Ukhahlamba and Chris Hani Districts have a very active craft community with numerous craft and a few art projects operating within those areas. The Mthata area houses the Eastern Cape craft hub However visual art is generally poorly represented in these areas

An estimate of the numbers of visual artists living and working in the region

The majority of the artists are white @ 75% (55% female and 45% male), black (including coloured and Indian etc) make up the rest at 25% (Black artists are mostly male)

A high percentage of the artists are between the ages of 30 and 40 years old (48%)

Artists are clustered around the major metro areas such as PE, Grahamstown, Alice and East London. These areas have a vibrant visual arts community which could be attributed to the

tertiary institutions found in these areas.

Region	No of Artists	%
Alice, Fort Hare and Surrounding Areas	25	6%
Mthatha and Surrounding Areas	10	2,4%
Port St Johns and Surrounds	10	2,4%
Queenstown and Surrounding Areas	10	2,4%
East London and Surrounding Areas	110	26,3%
Port Alfred/Alexandria	20	5%
Grahamstown and Surrounding Areas	25	6%
Graaf Reniet/Abredeen/Nieu Bethesda	20	5%
PE Uitenhage and surrounding areas	140	33,4%
Langkloof/Karoo	3	0,7%
Jeffries Bay/St Francis Bay /Humansdorp and surrounding areas	30	7%
Tsitsikama and surrounding areas	10	2.4%
TOTAL	418	100%

Patterns of income

The pattern of income for artists in the Eastern Cape range from a 70-30% ratio with 70% being income generated from sale of art works and 30% of the income derived from other art related sources such as teaching art or supplementary incomes generated by partners or spouses, to an inverted ratio of 30-70% where 70% of the income is derived from art related sources.. A small percentage of artists are able to generate 100% income from art sales alone.

The rough estimate (based on the research conducted) of artists able to live of their art is:

15% of artists are able to live of their art alone (Mostly white artists with access to outside markets and a wider art buying public)

75% are dependent on other sources of income (art related)

10% are dependent on other sources of income (not art related)

Outline of problems facing artists

Skills gaps

A large percentage of artists are educated with a diploma or a degree and those who have been self taught have had some access to educational institutions and interaction with other artists. Most white artists have had some form of art training whereas a significant proportion of black artists are self taught. However almost all artists have had access to educational institutions and interaction with other artists. Almost all the successful Black artists have a tertiary Education in the arts. Some of these include; Vusi Khumalo, Dolla Sepeta ,Usen Obot and Sol Boloji.

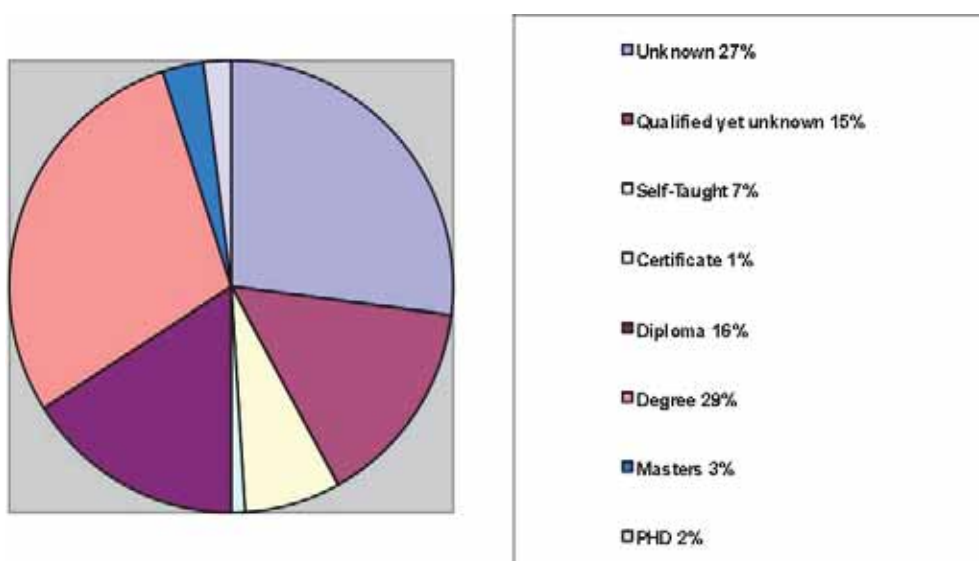
SETA training in the arts has mostly being confined to Craft Development, however some Learnerships , notably the higher NQFs , have had an influence on training for artists. Most SETA trained artists are Black. The EGAZINI project in Grahamstown is a good example of SETA Trained artists. This project is proving to be relatively successful. The Artists at the project have linked their works to the Heritage components of the Egazini Project and this strategy has proved successful.

It was noted though that artists generally, do not have the skills to promote themselves and to access markets. Therefore there seems to be a need to skill artists in the field of marketing and promotion as these expertise seems to be lacking for developing/emerging artists. Artists need training in proposal writing and how to access funding for projects from the various funding bodies. Artists generally (Black) are unable to respond adequately to a brief or a commission.

Currently Educational Institutions in the Eastern Cape have significant intakes of young Black students therefore future interventions in this sector will have to take note of these developments. What is lacking though is audience development, art management and curatorships training among the Black art community.

Below is a graph of the level of skills of artists in the Amathola and Cacadu districts. To a large degree this graph reflects the skills levels of the entire Eastern Cape. This graph is a sample taken from the survey conducted during the research for this report. It shows that 'most practicing artists have high level of education or at least an exposure to Institutions of Higher learning. The remainder have less formal qualifications and are either self taught or been exposed to other artists or institutions on a non formal basis.

To a large degree this graph reflects the skills levels of the entire Eastern Cape



In the Port Elizabeth Metro area there are some variances:

Self Taught artists make up 15%

SETA Trained (exposure to) 5%

Matric level 15%

Degree 55%

Masters 5%

PHD 5%

The level of education is higher in the Metro area as well as the level of self taught artists. This would suggest that:

1. Education levels are higher in the Metro area because of the size of the market and because of the art institutions in the area
2. Artists who are self taught are exposed to , not only a wider market than their counterparts in the rest of the Eastern Cape, but are encouraged to be artists because of their proximity to other artists.

An outline of common problems that artists face in pursuing their work,

include ;skills gaps, access to markets, lack of gallery space and lack of consistent government support.

Most artist exhibiting are white (with a 50 /50 ratio of male and female) Black artists are generally either very well educated or tend to be self trained with very little previous exposure (school level) to the arts. However there are numerous young Black artists who are the products of 'Private and Model C' education system. This group is still small but will grow substantially in the future. A large percentage of those studying art at Tertiary Institutions studying art are Black (across the Province)

Access to the Market

South Africa's market is small given the country's history of limited public exposure to art. The active market tends to be characterised by very conservative collectors/buyers, looking for art which satisfies their limited aesthetic rather than art and artefacts which pioneer new territory. It is believed that in South Africa as in the world as a whole, art is marketed as a fashionable and elitist commodity this restricts access to the relatively few artists who are recognised and condemns others to making art only when the day-job allows.

Generally the feeling is that living in the Eastern Cape artists feel marginalised and excluded from the National art world. Artists would like to be able to have access to galleries in other centres; this requires active marketing/promotion and scouting by agents living in the bigger centres.

Grahamstown is isolated in terms of market, the nearest "real" galleries are in Port Elizabeth, and even there the market/audience for more serious art is relatively small. There

are those who sell non-‘edgy art works’ and for these there are markets although the buyers are limited. There are very few artists who have links to Tourism and those that do generally work within the ‘Crafts’ genre.

Some artists sell their works on the Internet, however this is limited to those who are not intimidated by computers and the intricacies of Internet selling techniques. However this form of marketing is also limited and only the very knowledgeable and networked artists are able to market their works in this manner.

Other markets, such as the Anne Bryant in East London (funded by local Government) and EPSAC in Port Elizabeth have had various levels of success in promoting artists from the area.

The issue of networking plays a role in artists getting exposure at galleries. Most Black artists do not network as well their White counterparts and are therefore disadvantaged. Traditionally the art world in the Province has been dominated by white patrons and white artists and the few successful Black artists have risen through the ranks because of their talents and some form of patronage from either white artists or art lovers.

Exhibition openings are mostly attended by a white audience with some smatterings of Black artists, local politicians and Government officials and in some rare cases Black Business people.

Artists are forced to become their own agents and this is not a good option (artists should focus on producing art)

In summary therefore, although the Metro (PE area) is considered the biggest market place for the arts in the Eastern Cape it still is limited (two art galleries closed in the past year) and most feel that it is difficult to break into the bigger markets such as JHB. Training is required for art agents who would be able to take over the marketing aspect of the artists.

Access to raw materials

Generally materials are purchased locally, there are very good supply stores and those who are unable to get what they want order the materials in from other centres or purchase from bigger cities

3 The Market

Areas of market concentration.

Although the Nelson Mandela Bay Metropolitan area is considered the most artist friendly part of the Province with its art galleries and market opportunities it nevertheless does not support a large artist base. The numerous artists in the Province have a limited art buying public. Corporate collections are rare and in the cases where they do exist most of the work is produced by artists living outside the Province. Adrian Gardener owner of the famous Shamwari game reserve has a respectable corporate art collection, however bigger corporate companies such as GMSA (General Motors), Volkswagen, Coega etc do not have a structured curated art collection as yet.

Some artists have art agents selling their works however these agents tend to withhold payments and are sometimes unethical in their dealings with artists. It is suggested that some form of art agent training be developed by Government.

Galleries

East London area

The Ann Bryant Art Gallery which is funded by the local municipality is involved with the local art community and the East London Fine Art Society. It is the only “real” gallery promoting local artists in this area. However there are smaller home owned galleries operating within East London either on a private or commercial basis such as Gecko Art Gallery (private), Arts Unlimited (private), CVD Art Gallery (private). They are mostly linked with a framing business or a coffee shop as many galleries have tried to establish themselves and have not succeeded. Artists have linked with corporate business and utilised the space as an exhibition venue. This has proven successful over the years for some artists.

Galleries in the PE Metro area include:

EPSAC Art gallery

Artists using this gallery are predominantly white with a 50-50 ratio of male and female. The gallery has a few problems attracting Black artists (not for the lack of effort on the side of the gallery and the reason(s) for these are manifold. Generally Black artists tend to have funding problems mounting art exhibitions and this inhibits the amount of exhibitions they are able to have or be part of. The gallery chairperson has gone to great lengths to attract Black artists and Black audiences to the Gallery, however they have had limited success.

EPSAC has been in operation for the past 90 years and is a community art gallery. It is an NPO with a small grant from local Government. It has one paid staff member and the rest are volunteers. They have a membership fee, gallery rental and commission on sales barely cover the cost of running the gallery.

They are able to be of service to artists who pay but generally the emerging Black artists are not as well serviced because of this lack of funds.

The Nelson Mandela Metropolitan Art Museum

This art museum has only recently being managed (and fully funded) by local Government. It is not a commercial art gallery and has in the past focused on more established artists (mostly white) at a National level. It will be interesting to see in how the museum will adapt to its new role as a municipal entity. It does have regular (yearly art exhibitions) when local artists are able to exhibit. The museum has a substantial art collection.

Other smaller galleries

The Cuyler street art gallery, one of the more successful art galleries has been forced to close because its owner has gone into retirement. This gallery catered for a range of artists and had a very good buying public audience.

Heidi Kuhn Art gallery has recently closed down because the owner moved to Neu Bethesda (another art haven) close to Graff Reneit.

The Ron Belling art gallery

This gallery houses the Ron Belling art collection but has had many successful commercial art exhibitions. It is run by a Trust and is fairly new. It has a high standard and artists exhibiting here are generally successful as the gallery is able to attract te more corporate art buyers.

Other galleries include:

The Red Location Museum – although not a gallery it has had commercial exhibitions. A new modern art gallery is being built in the Red Location precinct and it is envisaged that this gallery will provide exhibition spaces for emerging and recognised artists in the Province.

Egazini project in Grahamstown- this project exhibits the works of the artists working at the centre.

As well as many smaller less well known art galleries scattered across the Province.

Art routes

East London does not have an exclusive art route however; The Jikeleza Route is the East Coast tour route (which is loosely based on the Midlands Meander). A few artists are listed on the route which features them as open studios; they receive advertising in the publication and signage on municipal boards. There are no art routes in the Metro area although many artists exhibit in smaller areas close to St Francis and Jeffries Bay (retirement areas for the wealthy) Hogsback has many art outlets and artists who live and work in the area.

Open air markets

These annual events such as the Gonubie Festival, The Jikeleza/Inkwenkwezi fair, The Agricultural Show etc. are more craft and home industry orientated with an influx of North African Craft and Chinese imported plastic, not a truly viable option for artists. PE is in the process of developing its cultural precinct where opportunities for open air markets are available.

Festivals and events

National Arts Festival

This is a major platform for local Eastern Cape artists. This annual event gives artists an opportunity to market and promote their art to local, national and sometimes international buyers. It has proved to be very successful and has launched the careers of many artists living in the province.

Home EXPO

This is an event that happens annually, galleries and artists can tap into this market. However the financial outlay for rent is costly with no guarantee of a return.

National/International Conferences (Decorex, Design Indaba, Impact, Defsa)

This creates a wonderful opportunity for artists to tap into broader markets, again there are enormous expenses involved and many artists don't have access to this kind of funding.

Food and Wine Fair

This is an annual event that takes place in East London although the focus is on food and wine there is an opportunity for artists to perform/display and market their work to a local market.

Art in the Park (Nelson Mandela Metro) – This is a monthly event (the first Sunday of the month) – Mostly craft related products are sold here. Any artist exhibiting at the stalls generally fall into the 'commercial artist' category and is not taken seriously by the art world. Other similar art 'fairs' criss-cross the Eastern Cape (in particular the Western half) and generally cater for the craft market.

Is there a viable market for the visual arts?

The simple answer to this question is no. The potential to create a market is there, however substantial interventions from Government and the Private sector will be required to develop and provide an enabling environment for the growth of this sector.

To what extent does the market lie outside of the province (elsewhere nationally and internationally?)

Cutting edge visual art works produced by Eastern Cape artists have recently become sought after in markets outside the Province. However it is only the better known artists who are able to sell at a consistent level to local markets and even these have outside (National) buyers.

And how do products find their way into these external markets?

Most successful artists have agents and others are able promote and sell their own works. Generally agents are considered a necessary evil and some of the artists have indicated that their dealings with these agents have not always been satisfactory. An example being late payments made by agents. Some artists exhibit their works at galleries in places such as Pretoria and JHB but are extremely reticent to reveal the names of these outlets.

To what extent are galleries and markets well attended?

Some exhibitions are well attended while others are very badly attended. At a recent exhibition at EPSAC in Port Elizabeth, of very well known Chinese artists, the attendance was dismal. If the artist is well known and has built up a name for him/her then generally exhibitions are well attended. The problem faced by many local artists is that National Galleries are not interested in representing artists who have not won national competitions or who don't have work in national collections.

What are the main challenges that these businesses/initiatives face?

Financial support from funding bodies. Art appreciation among the audience and consumer and to make a distinction between art and 'Sunday painting'.

Generally there is no link between Tourism and the visual arts. The traditional craft markets dominate thinking in this sector and the distinction between the visual arts and craft is not made, or not understood by this sector. A great deal of education is required to make the average tourism industry economists understand the potential and how to make the links between Tourism and the artists. An attempt has been made by the Red Location museum in the Nelson Mandela Metro to link the Visual arts to tourism. The Red location museum art precinct is in the process of being developed and a state of the art Gallery will be completed by 2010. Additionally the Nelson Mandela Bay Development Agency (NMBDA) is in the process of developing a cultural precinct in the centre of the Metro. Already it is commissioning public art for the rejuvenation of the Donkin Reserve located in the centre of the City. A tenuous (positive) link between the Nelson Mandela Metropolitan University (NMMU) and the NMBDA is developing around the Donkin project.

Corporate Collections

There are a limited number of corporate collections in East London and do not play a significant role in the market. The NMBM have small corporate collections but are not significant as most of the art works are sourced from outside the Province. It should be

noted that this market niche has the potential to develop if pursued by artists and art activists.

4 Education and Training:

An assessment of education and training provision in the Eastern Cape

Who are the main providers of education and training within the visual arts?

The main providers of art education are the four universities viz:

1. Fort Hare University
2. Walter Sisulu University
3. Rhodes University
4. Nelson Mandela Metropolitan University

Additionally there are FET colleges which include:

1. The Buffalo City FET College (East London)
2. Port Elizabeth FET College (Port Elizabeth)
3. Damelin School of Media Design and Technology Graphic Design (East London)
4. There are numerous 'ex Model C' schools offering art as a subject.
5. Limited private art institutions managed by individuals or art associations similar to EPSAC in Port Elizabeth.

(Refer to summaries of all these providers in appendix A below)

If there are no providers, where do people go for training in other areas of the province?

Artists who are unable to access these providers are generally self taught or have an association with other artists in their areas. Generally if an artist is gifted enough, he/she is able to eventually access some sort of art establishment/gallery/patron/, or as the poet said, "many a flower is born to blush unseen and waste its sweet fragrance on the desert air"

To what extent are artists self-taught or trained through apprenticeship?

Refer to above

Have learnerships or skills programmes through the SETA had any impact in the province?

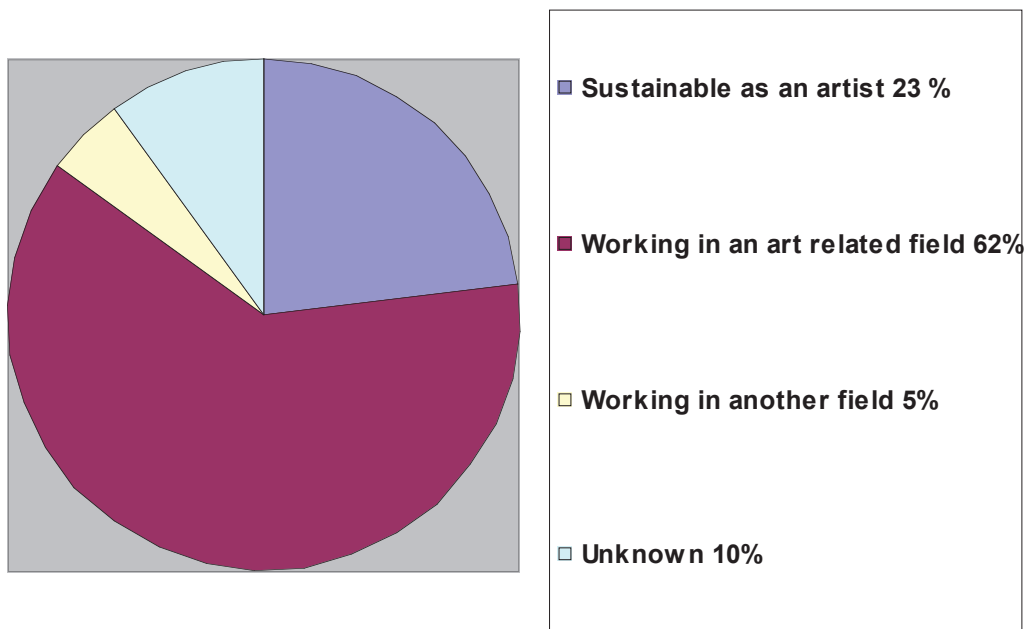
Generally SETAs have focused on the development of Craft in the Eastern Cape through Learnerships and skills development programmes such as those offered on a NQF level 2,4 and 5. Aspects of art skills development are included in these programmes but are not sufficient enough to produce 'fully fledged artists' Some artists have emerged from these programmes though because of a broader exposure to the arts. These are almost entirely Black artists.

What proportion of artists who receive training through these institutions go on to become practicing artists?

Most institutions do not have formal alumni tracking mechanisms and information gathered here is based on hearsay and bits and pieces of information lecturers have gathered over time. Generally Fort Hare and Walter Sisulu University graduates are drawn towards government posts (mostly in the Arts and Culture departments) while some become teachers (art teachers if they are lucky) and others are completely lost to the arts. The concept of art management is not popular in the Eastern Cape as yet. Rhodes and NMMU graduates (Rhodes students are mostly not from the Province) go on to be either artists or work in an art related field.

What proportion go on to work in other roles? And what proportion is entirely lost to the sector?

Below is a graph (based on this survey) of the Income groups or sustainability of artists in the Eastern Cape.



5 Development Initiatives: Refer to appendix B

Arts and Teaching Initiatives (ATI) (a SETA Related NGO with limited training for Visual Artists)

Red Earth Ceramic Project at NMMU- focusing on Ceramic based art and operating out of the NMMU in Port Elizabeth

VANSA – Fledgling organisation struggling to make an impact in the Province

Arts and Craft Tent (DSRAC) – Annual Event limited to the National Arts Festival in Grahamstown.

EGAZINI project (Grahamstown)- Arts based project specialising in relief prints . Fairly

successful and provides employment to artists (Black) residing in Grahamstown.

ART FROM THE GROUND UP was a Visual Art Exhibition that was initiated by the Eastern Cape Department of Sport, Recreation Arts & Culture and the Province of Lower Saxony. The partnership between these two provinces encourages the international exchange of cultural products, ideas and artists.

IMBUMBA – a *Collaboration through the eye of the artist* was a project initiated by Lisa Van Wyk on behalf of the Eastern Cape Department of Sport, Recreation, Arts & Culture (DSRAC) to stimulate collaboration, growth and development among local artists.

Give Way 2 Right, is an outreach art education project hopefully to be sponsored by the Department of Sport, Recreation, Arts & Culture. It is aimed at grade 12 learners from the Buffalo City district. The project is intended for schools who do not offer art as part of the curriculum. The learners will creatively explore and express themselves in groups through mixed media canvases. The focus of the project is to expose learners to visual art as a career or tertiary education option.

EAST LONDON FINE ART SOCIETY

The purpose of the society is to promote the appreciation of the various forms of visual arts among all interested people, artists and public alike, in the Border Region. The Society aims to be recognised as helping growth and development of the arts and they strive for a high quality of service to their members.

Eastern Cape Society of Arts and Culture (EPSAC)

An art NPO Located in Port Elizabeth. It services a wide range of artists from the Metro (at present mostly white artists). The organisation is run on a volunteer basis and has one fulltime employee. Membership fees, gallery rental and commission on sales do not cover the running costs of the society. The society relies on donations this severely limits its impact on the art community. They are able to deliver a service to artists who are able to afford the costs but are not in a position to provide sustainable assistance to emerging (i.e. Black) artists. It is a 90 year old organisation and at some time in the past it was a highly respected role player in the arts. The organisation has sadly declined and lost some of its credibility in recent years and professional artists have viewed it as a place for amateur artists whilst Black artists see it as a 'white stronghold'. It has recently started to look at repositioning and redefining its approach and profile.

The Eastern Cape art award –this award is designed to promote artistic excellence in the Eastern Cape. It is an art competition promoted and coordinated by the Nelson Mandela Metropolitan Art Museum. The grand prize is a solo art exhibition organised and funded by the Art Museum.

Keiskamma Art Project-Was created in 2000 and is a non-profit NGO which provides jobs, skills, training and hope in the Xhosa community of Hamburg and surrounding villages in the Eastern Cape. It is a branch of the Keiskamma Trust that was founded by Doctor and Artist Carol Hofmeyr, Shoprite-Checkers Woman of the Year 2007 in the category Arts, Culture and communication.

The Spier Art competition

The Africa Center participation in the Artists in residency programme is linked to a larger

project, which it conducts the SPIER Contemporary 2010. The SPIER competition is the largest Biennial art exhibition and competition in South Africa. SPIER has organised an artist in residence programme (a three week intervention) which intends to provide emerging , mid career artists living and working within the Eastern Cape with an opportunity to deepen and broaden their artistic practise. Seven artists are selected based on the quality or potential of their work, their interest in working within the programme and who are serious about developing their careers as artists.

6 Policy recommendations:

- **Community service**
Implement a system similar to that of the medical profession. Government pays for the education and training of artists in return the artist is deployed as an intern in the rural areas as an art facilitator/trainer/educator for a period of time. The purpose is to educate, expose, develop skills and train in the skills of art production.
- **Online data base**
A professional, easy to navigate data base be developed for artists who can be made available to local, national and international art buyers, tourists, corporate business etc. (Website) The National Department of arts and Culture should develop a data base of all artists in the Province. It should be refined to include information about materials, professional status and other relevant information about the artists, channels of distribution of art works utilised, national and international exhibitions available, and all contact details.
- **Corporate social responsibility that benefits the artists/Creative Intervention**
A certain profit percentage from corporate business is contributed to local artists to produce art works to be housed in the corporate permanent collection. Details of artists can be made available to business via the above website.
- **City Beautification projects**
The Local Council/Authority/Municipality definitely needs to be more proactive. Artists can be commissioned to create art in public spaces, local parks could be creatively painted, sculptured etc. Other cities around the world represent their artists proudly in the streets.
- **Tourism**
Marketing, P.R. and publicity should all be made available to artists via these channels; the above city beautification project is a great way to involve tourism with the arts. The tourism board needs to advocate for their local artists either through publications or websites.
- **Promotion**
Promotional material of artists, galleries, open studio's, art projects should be made available at all critical entry points into local regions.
- **Sponsorships/apprenticeship**
Sponsored mentorship programmes should be made available to emerging artists linking them with private established artists.
- **Studio facilities**
Many artists who have studied printmaking or ceramics are unable to continue producing work as they require facilities which are usually too costly for an individual to set up. Printmaking is one of the mediums which lends itself to the commercial aspect of art and is

easily transportable. Viable, properly managed and funded collaborative studios should be made available to any artists requiring the facilities.

- **Representation**
It is hoped that the government can put aside empowerment issues and actively represent all artists.
- **Tax rebates for Corporate Business**
Propose tax rebates or reductions for corporate businesses that acquire artists work as part of their permanent collection. This would encourage corporate business to become involved with their local art community and increase their investment in the arts.
- **Income Tax exemption**
Several European countries make special concession to their creative communities, recognizing both the value they contribute to their nation's culture and the simple fact that it is difficult to make a living as an artist. For example, Irish artists are exempted from paying Income Tax
- **Grants or monthly stipends from Government**
Dutch and German artists receive monthly stipends from their governments in return for contributing work to national collections.
- **International Exposure**
More group shows to be organized and exhibited at International centres, artists and art can be used as ambassadors for South Africa promoting interest in South African, boosting tourism and the economy.
- **Policy development** The development of a Policy for the Visual arts at National Provincial and Local level

7 Conclusions

The Visual art sector of the Eastern Cape is rich with potential and opportunity but has a dark history linked to its political and historical past. There is a region in the Eastern Cape branded "Frontier Country". by the tourism authorities. Noel Mostert writes in his book 'Frontiers'

"The frontier between white and black that arose at the eastern limits of the Cape colony was thus the product of two of the greatest human odysseys and endeavours, the terrestrial one of Africa and the maritime one of Europe... The human collision of the Cape's frontier became as well therefore a particular frontier of the enlarged global consciousness that sprang from the Enlightenment and from the intensified thrust of the aggressive expansion heralded by Adam Smith in 1776"

The clash of cultures which begun in the late 1700's and so aptly described by Mostert, has had repercussions for all down the centuries and has ever since played a major role in shaping the Eastern Cape's, and to a large extent South Africa's cultural and political consciousness.

The Eastern Cape landscape is dotted with Forts that have sprung up throughout its tumultuous history. Places such as Fort Hare, Fort Beaufort, Fort Brown, Fort Cox, Fort white Fort Armstrong and many more have populated the Eastern Cape landscape and are physical reminders of the wars which waged in the pursuit and defence of the land. As physical Forts

sprung up across the Eastern Cape the cultural forts of language and culture developed in tandem. One such Cultural Fort, still standing today (and very well disguised to conceal its real purpose) is the 1820 settlers' monument in Grahamstown. This cultural fort is a strong symbol of the processes of colonisation and globalisation which have affected and influenced the Eastern Cape.

As a consequence of these historical events, Black artists in the Eastern Cape have been marginalised not only because of their limited access to physical resources (although this has been a major contributor) but also because of the absolute control western thought have had over the arts globally. As a consequence, and similar to the political process unfolding in the country, Black artists have always had to play 'catch up' with their White counterparts. African art and African culture in general was relegated to the realms of superstition and at best it was described as 'craft'. Artists making an entry into the White world were forced to adapt to its iconography, rules and aesthetics, immediately placing them on the back foot. Artists such as George Pemba and Gerald Sekhoto, now famous more because of their historical significance than because of the impact they made with their art, were the Black pioneers entering the White world of the arts.

The Eastern Cape resisted the encroachment of the settlers (and their colonial ideologies) up until the mid 1800's when the fabric of African society fell apart under the tremendous forces of colonialism and globalisation. The Eastern Cape's frontier wars then evolved into a struggle not about land, but about culture. The hearts and minds of the indigenous peoples became the target of the colonisers who used the weapons of religion and language (not to forget the gun) to subdue and assimilate the Black population. The 1820 Settler Monument in Grahamstown is not a monument rather it is a colonial fort built to preserve, protect and grow its intangible heritage of language and culture.

Black artists in the Eastern Cape do not only have to contend with the marginalisation the Eastern Cape 'enjoys' as a Province of South Africa, but with the marginalisation of their Culture and the 'internal colonisation' of the White settler. No wonder so few Black voices are heard on our country's cultural centre stage.

Having to play 'catch up' (a very difficult financial and spiritual task) Black artists are forced to contend with a lack of audiences and a buying public (and for economic and cultural reasons most buying public is White) the inability to access training resources (and when that does happen, having to contend with the second or third language tutelage on offer) the inability to develop a network able to sustain an artist lifestyle (even in a modest way) consequently Black artists are not able to make an impact in the Eastern Cape and subsequently South Africa.

With the new dispensation (post 1994) the lot of the Black artists has improved somewhat but not substantially enough to guarantee any sustainable growth of the sector. Many Black artists are still promoted as rarefied curiosities at festivals such as the National Grahamstown arts festival, only to be forgotten and discarded in favour of the next 'flavour of the month' artist the following year. White artists in the Eastern Cape do not fare much better although they have an advantage of being able to access an art culture and aesthetic with which they are largely familiar. The isolation of the Eastern Cape from the main cultural areas forces many artists (white and black) to sell their works beyond its borders. Here to the Black artist is hampered by a lack of networks and exposure to business acumen. Simple technological tools, such as the internet, website design and face book are technologies many Black artists do not embrace. At the recent Spier Art competition workshop at Fort Hare University, five of the seven artists (six Black and one 'coloured') did not have a website or was able to promote their works through websites and the internet.

Government grants for artists are minimal and difficult to access. The Provincial Department of Sport Recreation Arts and Culture (DSRAC) do not have a budget for artists instead funds are accessed through the Eastern Cape Provincial Arts Council, ECPACC) and between 80-90% of DSRAC's budget is allocated to paying the salaries of its numerous staff members. Local government, with the exception of the Nelson Mandela Bay Municipality, do not have specific art budgets and do not have any art policies in place able to assist with the development of a strategy for the arts. In fact DSRAC does not have a visual arts policy at all and have been in the process of developing such a policy for many years.

Art training at school level was introduced through the system of OBE via the Arts and Culture learning area, but this has proved to be cumbersome to implement. The reasons for the failure of OBE at school level are well documented and the lack of trained teachers is probably the most crucial factor for this failure. MTN have embarked on a 'mini' teacher training programme in the Fort Beaufort area and 35 teachers have been targeted for upgrading and art training. This is however a drop in the ocean as much more needs to be done to develop the arts at the foundation phase level.

In general art in the Province has a great opportunity to develop its rich art heritages and potential once an enabling environment, provided by Government and Business, is put in place. This enabling environment should allow both Black and White artist opportunities to access the economic benefits of their art. Although Government is playing a role in the development of the sector there is still much more they could do to make it more sustainable and vibrant. Artists themselves should ensure that their art is made more accessible and a more professional approach to marketing and production should be embraced.

III. North West Report

Prepared by Giselle Baillie

Overview

Strengths:

- The province has been well marketed in terms of tourism over the past two to three decades and in certain areas has established itself as a well recognised art route nationally
- A number of fine artists as well as commercial artists working across a range of media live and work in the province

Weaknesses:

- A number of emerging black artists indicate that they do not receive the support that the visual arts actually require. Those who are being assisted by the provincial government are assumed to have personal or other linkages to the department's officials.
- No tertiary institution offering Fine Arts in the province.
- Lack of understanding at public service level of the value of the visual arts hence lack of funding for municipal galleries and museums

Opportunities:

- A good number of young black artists are interested in and seem to practice photography. Klerksdorp has a photographic studio which seems to be used by some of the emerging artists to gain the initial skills where after they move to Gauteng to gain more skills at the Photo Workshop in Newtown
- A number of areas in the province are well marketed in terms of tourism, have good attractions and can be developed further
- The province borders on and incorporates three world heritage sites

Threats:

- It would seem that the provincial Department of Arts and Culture is viewed by a number of visual artists based at the community level more as a threat than as a benefit. For many artists it is almost impossible to manoeuvre through the culture of nepotism.
- A number of young black artists move out of the province in search of better infrastructure and support
- Lack of sustainability of marketing ventures undertaken by the province
- Lack of skills in the visual arts across the full value chain spectrum

The Position of Artists:

Artists in the North West Province seem to be spread across the province as follows:

- Approximately 30 – 35% live and work around the geographical node of Potchefstroom & Klerksdorp;
- Another 30 – 35% live and work around the geographical node of Rustenburg;

- Another 30% seem to be scattered across the province, with more consolidated clusters coming forth in the areas of Taung, Vryburg, Hartbeespoort, Mmabatho, Marico and Lichtenburg.
- Scatterlings of artists, making up the last 10%, but which are however too spread to consider as a considerable cluster, are then found across the smaller towns and areas such as MooiNooi, Zeerust, Lichtenburg, Swartruggens, Magaliesberg, DeLarey, Mafikeng, Leeupoort, Noordbrug, Flamwood, Ellisras and Glenstantia.

Although Lichtenburg also used to be a strong area in terms of the visual arts (with particular reference being made to the Willem Annandale gallery in the town), this has died down considerably over the past two decades. Many of the artists who used to work in the area have stopped working owing to old age or ill health with fewer younger artists emerging into the area. A few decades back, Lichtenburg was well known for the arts, particularly that of the visual arts. The Willem Annandale's collection was considered to be one of the best in South Africa, however the representivity of work also has to be questioned within our democratic framework.

With the data collated for the purposes of this study, it would seem that there are approximately 205 visual artists in the province.

39 of these listed artists are black with the balance being white. This makes the number of black visual artists in the province to stand at approximately 20% of the total.

Of the total estimated number of artists in the province, 81 are male, with 124 being female. It is striking that amongst the black visual artists, very few are female however.

Nontsileko Veleko, the 2009 Standard Bank Young Artists Award Winner of the Visual Arts was born in the North West Province and her current achievement does seem to influence many aspiring female visual artists, many of whom are also attempting to get into the photographic sector as fine artists or professionals. However, as they indicate, finding success in the province is difficult as the support for black visual artists is generally low, underfunded or sometimes even non-existent. These artists indicated that they receive more assistance from the Photo Workshop in Johannesburg than they do from structures in the province.

The ages of these artists generally range from 20 years of age up to the mid 60's. What must be considered from the data collated as well is that a fair percentage of those listed are not necessarily practising the visual arts themselves, but are more often than not art supporters' or are crafters. This is especially true of the data collected from the Rustenburg Visual Arts Association, the Potchefstroom Visual Arts Association and what has been found through the Hartbeespoort area.

Income from the arts in the North West Province needs to be evaluated in the context of each cluster/region as it seems that different opportunities for income generation exist according to geographic location.

In the areas around Taung, Vryburg, Mafikeng and Mmabatho, very few of the artists practising outside of institutions actually make any form of income from their work. This is mostly to do with the lack of a market for the visual arts beyond the training offered by the Mmabana Foundation in addition to the fact that through the provincial Department of Arts and Culture, the visual arts are also often

conflated with that of craft in the area. In addition, visual artists also feel that they are considered as secondary to the performing artists by the provincial Department.

This area does show signs of being deeply dependent on the provincial department of arts and culture in terms of support and development, a challenging factor for many of the artists. Although a number of artists are said to go through the in Mmabana Foundation, it is seldom that these artists are able to make a living from the arts in the area.

Visual artists working outside of the institution relate that they need to diversify their visual arts skills across commercial media in order to make a living with this including t-shirt printing, running arts skills workshops or diversifying into craft design and production.

Artists who work from within institutions as trainers or managers, such as the Mmabana Foundation seem to have a better chance of selling their work, although they are not dependent on sales for survival.

Artists clustered around the Rustenburg and Magaliesberg area seem to have a history of making a living from their art, although this has died down considerably since the economic downturn. Information from the Rustenburg area currently indicates that a majority of the artists are no longer able to earn a decent living from their art and have had to turn to other forms of income generation over the past two years. The area is however well known for its 'art meander' which is linked to the Crocodile Route with a number of galleries and craft shops having been established in Hartbeespoort, Rustenburg and the surrounding areas since the 1990s. The majority of these establishments have however been badly affected by the economic downturn over the past two years.

The Hartbeespoort area is also well known for its art meander and has received considerable marketing of this aspect for a number of years to date. A number of well known artists working across a range of media are able to make a living from their work with many of them having established their own galleries in the area for marketing and selling purposes. Many of these artists however do not rely solely on the passing trade in the area, but have spread the reach of their product to other provinces and centres as well. This usually takes the form of these artists using the Hartbeespoort area to create their work, but the selling also takes place through other galleries across the country. Over the past year or two, a few of these established artists have also left the area to move to areas closer to galleries and commissions, including Pretoria and Cape Town.

Potchefstroom presents an interesting scenario in terms of income generation. Potchefstroom has a high density of artists living and working in the area, many of whom are commercially oriented and who rely on sales through the monthly art market, commissions, sales through the art associations, galleries/ craft shops. Income generated by these artists is however not enough to sustain them on a regular basis, although it does seem that a few years ago a number of artists were able to make a living in this manner. However, similar to the other areas, the economic downturn has resulted in many needing to find other forms of income generation.

A minority of these artists are employed as arts educators across a few institutions including the University's Creative Lab or schools. The Creative Lab does not offer fine arts however, but graphic

design. Artists who are employed here can generate and sell art but are not reliant on sales for an income.

The area is also home to the annual Aardklop Festival which takes place in September where local fine artists might get a platform for work. Although there is exposure, it also seems that this is less to do with selling and more to do with conceptual/intellectual development. It is however very seldom that fine artists from this area or the province will be afforded this platform as there are simply not enough working within the conceptual/intellectual framework. The festival as a platform however does afford local artists the opportunity to exhibit in a group exhibition.

This festival includes a wide programme on the visual arts including providing platforms for nationally recognised artists, art tours, art safaris and a variety of spaces for the showcasing of local talent.

In general it could be estimated that of the 205 listed artists in the province, that approximately 15 persons are educators or trainers in the visual arts sector (ie sell, but are not dependent on sales for an income), that 6 operate in the Hartbeespoort area as fulltime visual artists (able to earn an income from their work), that a further 2 from the Groot Marico area are also making a living from their art and that approximately 10 - 15 from the Rustenburg/ Magaliesburg area had earned an income from their work prior to the economic downturn and that the remainder are positioned as commercial artists, however that they do not rely solely on their art for income generating purposes.

It must also be noted that many of the artists leave the province permanently or migrate across the year seeking better selling opportunities. This is particularly relevant to the black visual artists, especially those around the Vryburg, Taung, Mafikeng and Klerksdorp areas who fail to make a living from their work.

Access to markets

Artists around the Potchefstroom, Magaliesburg, Rustenburg and Hartbeespoort areas have a good amount of infrastructure in place already with regards the facilitation of market access.

The visual arts in Potchefstroom is well marketed in terms of the Aardklop Festival, the municipality of the area also includes the visual arts in its product range. Potchefstroom also has access created a form of access through its educational or sectorally linked institutions such as the Anso Art Centre, the Creative Lab - Graphic Arts Department of the Potch University, the Arts Society and the National Arts Foundation. Artists working in Klerksdorp generally link into the marketing from Potchefstroom although market access is also created through the photographic society and various websites linked to private arts 'societies'. Further market awareness of the number of visual arts products/ initiatives in the area is linked to marketing through accommodation and tourism initiatives, especially linked to that of the Vredefort Dome World Heritage Site and the N12 Treasure Route.

Hartebeespoort was possibly one of the earliest examples of arts route marketing in the country and is well known as an area for the visual artists. The area has five galleries, although these are usually for the display of the owners work. The Hartbeespoort meander is also well marketed by the provincial tourism department as well as by private business initiatives. Marketing of the visual arts is also included in brochures, magazines and websites linked to accommodation establishments, conference venues etc.

Magaliesburg and Rustenburg, owing to their proximity to the Sun City route as well as their linkages to the conference and leisure routes of the area have good visual arts marketing within local tourism initiatives etc. Similar to the Hartbeespoort area, the majority of accommodation establishments and marketing initiatives highlight the variety of visual arts galleries, shops as does the provincial tourism initiatives.

Artists around the Marico and Groot Marico areas rely on marketing linked to tourism initiatives, as well as on traffic linked to Botswana.

The western and south western sides of the province, including towns like Mafikeng, Vryburg and Taung are included in the provincial marketing initiatives however also rely largely on government marketing initiatives, usually associated with the Mmabane Community Arts Centres or with the Cultural Calabash Festival. Artists however feel that the marketing and access to markets with regards the visual arts is however not well defined, with emphasis generally being placed more on the performing arts than on the visual arts.

Skills Gaps

The skills gaps in the province include:

1. Arts Administration
2. Technical skills in the fine arts – discipline specific
3. Marketing
4. Fundraising
5. Business management

Raw materials

Access to raw materials is largely defined by the geographic areas in which the artists live and on the economic situation of the artists. Artists operating on the South Western Side of the province around the areas of Taung and Vryburg struggle to get hold of raw materials, and at prices and in quantities which they can afford. The majority of black artists in this area indicated that they needed to import their raw materials from centres such as Johannesburg and that as a result of this distance and cost issue, in addition to the fact that artists could not afford to buy in the quantities that they can afford, that the majority of the artists in these areas work with cheap and inferior raw materials.

Artists working around the Mafikeng and Mmabatho areas rely on accessing raw materials through the Mmabane Foundation, although the majority of artists cannot afford these raw materials either.

Artists working in the Potchefstroom and Klerksdorp areas are able to access raw materials through the University or through a variety of galleries and stationery shops which supply them. Bulk orders are still made to the manufacturers in Johannesburg however.

Artists working around the Rustenberg area follow the same pattern as the Potchefstroom and Klerksdorp artists, while artists working in the Hartbeespoort area rely on Johannesburg and Pretoria for their raw materials.

Artists working in areas around Lichtenburg, Brits, Mooiwool et al also rely on importing their raw materials in.

Infrastructure

Infrastructure in the province is historically defined, and is closely interlinked with the economic history and current status of an area.

Artists working in and around the Hartbeespoort, Rustenburg, Potchefstroom and Klerksdorp areas generally have good infrastructure in place.

Geographic areas within the former Bophuthatswana areas however suffer from poor infrastructure with the impact being evident on the lack of economic growth of the visual arts. The provincial Department of Arts and Culture, through the Mmabana Arts, Culture and Sport Foundation, put in place the development of satellite community arts and culture centres along the western region of the province, however the sustainability of these has been questioned. Eight community centres are currently listed:

- Mmabana Arts, Culture and Sport Foundation
- Mmabana Mafikeng
- Mmabana Taung
- Mmabana Lehurutse
- Mmabana Tlhabane
- Kanana Community Arts Centre
- Brey Community Arts Centre
- Maubane Community Arts Centre

Although the Mmabana Foundation states that the centres are utilised for programmes across the Arts, Drama and Dance fields of discipline, the majority of artists attest that the Fine Arts seldom feature.

Political will and support of the visual arts

Challenges in terms of political will are experienced by all artists in the province.

Artists working on the western regions of the province, and who are mostly black, cite a deep dissatisfaction with the manner in which the provincial Department of Arts and Culture and the Mmabana Foundation supports visual artists and the development of the visual arts.

The Lichtenburg area, once renowned for its art collection, no longer experiences the support it once did and now has to contend with limited or non-existent budgets for visual arts developments and the maintenance of the collection housed in the Willem Annandale Gallery.

Rustenburg artists indicate that the local municipality no longer supports the visual arts. The city has

the infrastructure for the visual arts, and it seems that it is still used for something to do with the visual arts, however there is a lack of communication with artists.

The Market

The North West Province is often described as the 'Backyard' province of Gauteng in the sense that many residents of Gauteng make use of the province for leisure and short term travel purposes. This is in particular reference to the areas around Hartbeespoort Dam, the Rustenburg and Sun City areas.

Hartbeespoort has six galleries, and is an area well recognised for its art route. This route further links up with that of the Rustenburg area who in turn have approximately 7 galleries in the area in addition to a number of variety shops and establishments which feature both the visual arts as well as crafts. Both of these areas link to the Crocodile Ramble, a multi-product tourism route starting from the Cradle of Humankind moving through Hartbeespoort, to Rustenburg, to the Sun City area. Products incorporated in this route focus on merging the visual arts and crafts with lifestyle.

While Rustenburg has a number of galleries, it does not however have any major marketing events in which the visual arts are able to gain a platform. This is cited as another of the reasons for the decline in the sales in the area.

Potchefstroom and Klerksdorp have a number of galleries, they also have a monthly art in the park event, as well as the Aardklop Festival, all understood to be creating a platform for artists. A number of artists however indicate that they are not given a platform for exhibiting in galleries nor do they believe that they will succeed in getting a platform at the Festival hence their decisions to rather seek platforms in other provinces.

The North West Province is also linked the N12 Treasure Route which links into the Vredefort Dome World Heritage Site area and Parys and then proceeds towards Kimberley. Artists however do not see the relevance of the route to the visual arts.

Audiences and consumers base for the visual arts

The audience and consumer base of the province is geographically defined as such:

Hartbeespoort and Rustenburg have been well supported in particular by residents of Gauteng who move through these areas in search of leisure activities. Foreign tourists are also moved through these areas on their way from the Cradle of Humankind towards Sun City.

The visual arts in these areas do have a viable market, with the local galleries and establishments being well attended both by locals as well as by domestic and foreign visitors.

A number of the galleries and establishments in these two areas are struggling at the moment as a result of the economic downturn, however more well known artists who work on commissions, especially in the Hartbeespoort area are still managing to turn over an income. The majority of their commissions are from wealthy business persons, government institutions or collections across the country, and at times, commissions from the continent or the East.

Potchefstroom and Klerksdorp rely on a mix of consumers, including locals buying artworks for

‘decoration’ purposes as well as visitors to the Festival and the tourism activities of the area (Vredefort Dome and Parys).

The galleries in these two areas have also taken a knock with the economic downturn, as has the monthly art market as people have less disposable income to buy their works. These two areas rely largely on the local audience. The visual arts are fairly viable in these areas, however this is related to the commercial production of art and not the fine arts.

The Creative Lab at the Potchefstroom University has a number of exhibitions, however the work from this school relates more to the graphic arts and advertising sectors. These exhibitions are well attended however. The town’s museum also has a small collection of art, however this is largely outdated and is not well attended either by locals or domestic or foreign travellers.

Visual arts audience numbers surge over the period of the Aardklop festival with the visual arts taking a central stage in the festival programme. It is estimated that approximately 40 000 visitors attend the festival each year.

The visual arts are reasonably viable in this area because of the education and training aspects of the area, but are not viable in terms of making a living solely from the visual arts. In fact, a number of young black artists feel that the area does not offer them opportunity for growth and expansion and would rather leave the area.

The Groot Marico area has come to rely a good deal on tourism initiatives for marketing over the past several years as well as on the private Game Lodges in the area. An annual festival also takes place in the area, the Groot Marico Festival, offering local artists a small platform for exposure, albeit on the commercial side of the visual arts. Artists in this area however do not rely on these events or on the local market at all, but rather work on commissions from outside of the province or commissions which are linked to the Game Lodges and their visitors.

Although once considered a hub for the visual arts in South Africa, the Lichtenburg area is no longer able to sustain growth and development in the visual arts anymore. Information sourced from the area indicates that the majority of the older artists are no longer able to practice and that the area has very little support in terms of emerging or younger artists. The Willem Annandale Gallery is still well marketed through provincial tourism initiatives, however the resources to maintain it are no longer evident. This area falls largely out of the reach of the provincial Departments programmes and as such seems to have very little viability anymore in terms of the visual arts.

Areas around Taung, Vryburg, Mafikeng and Mmabatho rely on limited infrastructure and what could be described as limited market access. Although the Mmabana Foundation has a gallery and has put in place a number of centres aimed at the development of the arts and a MAPPP SETA training programme has been implemented, the visual arts per se have not experienced much development. Artists working in these areas generally rely on marketing their works outside of this area and usually through opportunities which cross cut the visual arts with craft and design such as the Decorex expo in Johannesburg or the Botswana Trade Fair or the Macufe Arts Festival. It is interesting to note that visual artists from this area do not consider the annual Cultural Calabash Festival as significant for the visual arts either.

Linkages with other sectors

The success of the visual arts in the province are closely linked to tourism initiatives. This is very evident across the Hartbeespoort area, the Rustenburg area and the Potchefstroom and Klerksdorp areas. The successful relationship between the visual arts and tourism has also begun emerging in the Groot Marico area. All of the abovementioned areas have developed specific tourism marketing strategies which focus on hinging a lot of the attraction of the area to the visual arts. These routes are as previously indicated in the report.

The western region of the province is however not as well developed in terms of tourism assisting the growth of the visual arts. A large part of this problem hinges off the fact that the infrastructure for tourism is not in place, and neither is the human capital. Although the N12 Treasure Route runs through this area, the product content in these areas is generally not strong.

Art Collections

The Mmabana Foundation has a collection of the visual arts, however this again is conflated with that of craft. The Willem Annandale collection was considered to be one of South Africa's best in the period before 1994, and could be considered to be significant today if its collection parameters broaden or if a different interpretive framework is placed on the collection. The gallery is no longer able to acquire works of art however owing to a lack of funding and political support.

There are no other significant collections in the province.

Education and Training

The major schools offering art as a subject in North West are: Potchefstroom Girls High, Volkskool (Volkies) and Potchefstroom Gimnasium (Gimmies); Klerksdorp – Wesvalia, KS Klerksdorp High School, Milners High and St Conrads and the Lichtenburg High School.

The North West University Campus in Potchefstroom offers graphic design under the aegis of the Creative Lab although the majority of its lecturers are trained in the Fine Arts. Their Fine Arts Department closed down when the University phased out its teachers art training programme in the 1990s.

The Mmabana Cultural Centre in Mafikeng is a training facility which has an excellent ceramics department that is well equipped. The Mmabana Centres in Taung and Lehurutse have also offered training, although they have tended to focus on craft training. Aartema, a MAPPP SETA funded programme is linked to the Mmabane Foundation programme, offering accredited training.

If people want to study Fine Arts, the majority of students now study in at the Pretoria University, the Vaal University of Technology, while others study in Bloemfontein at the Central University of Technology or the Free State University. Those who wish to study informally will attend for example the Photo Workshop in Johannesburg, or the North West School of Design who have achieved their accreditation through the SETAs. Thanya's Art Studio and L.M.B Arts offers visual arts skills development in Vryburg and Taung respectively, however this training is not accredited.

Impact of SETA training

Learnerships were initially offered through the Mmabane Foundation by CreateSA from 2004 onwards. These focussed mostly on craft production however, at the NQF 2 level. No SETA accredited training has been offered in the visual arts to date.

Portion of learners going on to become practicing artists

Artists who have received training through the Mmabana Centres usually follow one of two options after completion of training:

1. Continue to seek further training opportunities either within the province or outside of it
2. Leave the training and attempt to set themselves up, struggle and realise that they have to use their skills in other ventures

The Creative Lab on the Potch campus seems to be developing some very good designers, many of whom are gaining recognition nationally and internationally. Information procured on this points to the success of many of its students who are winning national competitions and who are interning at major fashion and design houses overseas. These graduates would generally however leave the province as well in seek of work.

Development Initiatives

The most significant of the developments for the visual arts for the province seems to be tied to the development of the community arts centres and the promise made by the MEC in 2007/08 and well as 2008/09 budget speeches that these community arts centres would also develop galleries for visual artists. These initiatives are tied into larger budgetary allocations and hence not possible to ascertain the exact amount allocated to them. While the statements and promises have been made, the reality of getting these galleries into place seems however largely not to have taken place. This lack once again impacting on the development of platforms for black artists, operating at the community level and who are in serious need of platforms such as these to assist them in the development of their art forms.

The Role of Arts Associations

The province has three arts associations being the Potchefstroom Arts Association, the Rustenburg Arts Association and the Lichtenburg Arts Association. All three associations play the role of co-ordinator and support structure for artists working in and around their areas.

The Rustenburg Arts Association indicates that it currently has 35 artists on its database, however that those listed also include art lovers and might not be practicing artists themselves. The Potchefstroom Arts Association includes 52 artists on its database.

RAVA represents artists from the Rustenburg, Marico, Koster and Mooiwooi, with almost 99% of the artists being white, female and painters. The Potchefstroom Arts Association represents artists mostly from the Potchefstroom area, 100% white, with an equal mix between male and female and working across a range of media.

Black artists tend not to belong to the Arts Associations, nor do the more successful visual artists of the

province.

The role of the arts associations seems to be one of marketing of the activities of the artists of an area to tourism, the co-ordination of an annual exhibition of its members as well as the provision of 'professional' services for school art exhibitions.

The Role of Government

Relationships between visual artists and government is fraught with tension in the province. The majority of artists across the racial spectrum do not believe that government understands the value of the visual arts, nor have they adequately supported the visual arts. Government generally leverages its involvement in the visual arts through the Mmabana Foundation which is responsible for the Cultural Calabash Festival as well as the Community Arts Centres both of which visual artists for whom this development is intended do not see or experience its benefits.

Access to Funding

The most successful venture in terms of accessing funds is the Aardklop Festival which has been able to source funds from across a range of corporate and national funders. The National Lottery Distribution Fund also funded the development of the Community Arts Centres linked to the Mmabana Foundation as did DAC. However other than these activities, artists and organisations generally struggle to secure funding these days.

The North West School of Design indicated that it had been able to run community development programmes from 2003 to approximately May 2009, but that owing to no more funding being available that these programmes were dropped now. Many artists indicated that they heard of the National Arts Council however that very few of them had ever been able to access funding for projects mostly because they were not aware of the processes and that the province did not have people able to assist them in this.

The specifics with regards the budgetary allocations are not available.

Policy recommendations

The North West Province provides a particularly challenging situation in that its historical legacy of Bophutatswana still hangs heavily over the governance of the province. This is one of the reasons for the manner in which development has taken place to date, with the large majority of the residents of the province not being satisfied with service delivery.

A great sense of service polarisation is also evident in the province, with great mistrust between the private and public sectors as well as between citizens and government. Recommending policy within this institutional gap is therefore tricky at best. As a result, rather than policy recommendations, issues to be addressed rather need to be identified. These are:

1. The province must clearly define between crafts and the visual arts in order to ensure that each is developed appropriately
2. An awareness of what the visual arts are, and what value they bring to society also needs to be better defined.
3. Arts Education in all schools needs to be implemented. Currently the arts education aspect is linked to former white schools with many of the schools in the rural villages or former homeland areas still having very little access to arts education
4. Educators need to be well trained in the visual arts – the province needs training at a tertiary level and which speaks to the IKS value of the province
5. National funders need to make their areas of support better known throughout the province and not rely on single institutions to relay the information
6. The province needs to identify and support black female artists in particular, capitalising on their interest in photography in particular.
7. Community based festivals must broaden their understanding of the value of the visual arts and understand what the professionalization of the visual arts requires
8. Arts administration capacity is seriously lacking in this province, more emphasis needs to be placed on training artists in this field
9. Better training content, better quality training, better quality trainers needs to be encouraged.

IV. Northern Cape Report

Prepared by Giselle Baillie

OVERVIEW

Strengths:

- Perseverance of the artists of the province despite a lack of support and infrastructure
- Rich variety of cultures and image sources in the province

Weaknesses:

- Poor marketing of artists
- Poor government interventions
- Lack of financial support for artists generally
- Vast geographic and political distances between artists/communities/tourist routes
- No tertiary arts education institutions

Opportunities:

- Northern Cape is identified as an emerging tourism product/province, with considerable focus being put on the province over the past two or more years
- Culturally, a very strong province – communities continue to see the value in the practising of culture
- William Humphreys Art Gallery in Kimberley, is the only recognised Grade 1 fine arts gallery in South Africa

Threats:

- Visual arts often conflated with crafts
- Lack of transparency from government in terms of objectives, programmes, support etc

The Position of Artists

A common perception or misunderstanding is that the majority of visual artists in the Northern Cape live and work around the Kimberley area.

Visual artists in the Northern Cape seem rather to be spread across the province, more often than not, working clustered within municipal or geographic demarcations and very often developing art forms which are historical, unique or specific to their areas. The strongest of these are the 3 main regions including:

1. The Frances Baard & Sol Plaatjie districts (Kimberley, Barkly West, Delporthshoop, Hartswater);
2. The Siyanda district (Upington, Raaswater, Pabalello, Kakamas, Andriesvale, Riemvasmaak, Postmasburg) and;
3. The Namakwa District (Steinkopf, Pofadder, O’Kiep, Concordia, Calvinia, Port Nolloth)

The Pixley ka Seme District as well as the John Taelo Gaetsewe District have less of a presence in the visual arts sector, with these districts in reality having fewer practising visual artists or even crafters. Reasons for this could include the relative geographic isolation of the areas, the historical influences on the type of activities pursued in the area, the lack of infrastructure and resources or perhaps even the lack of awareness of the visual arts.

The geographic, political, historical and cultural vastness of the province must always be taken into account when analysing why certain areas have a strong presence within the visual artists and why others don't. Access to resources and the impact of history on areas in the province has by and large led to the province needing to be viewed with a particular framework when evaluating why certain things happen in certain areas.

Historically, Kimberley is South Africa's first 'modern' city, with a number of innovations first being introduced here. In fact, with the wealth and opulence which diamond mining was to introduce to South Africa, considered 'luxuries' such as that of the visual arts, became a feature of the area in the 1800s. As a result, the Africana Library, the William Humphreys Art Gallery and the Duggan Cronin Gallery host some significant collections of South Africa's early visual arts. The importance of the city as a fulcrum for the visual arts seems to have been maintained over the past 140 odd years.

Artists working around the Frances Baard & Sol Plaatje areas tend to work across the widest range of media including ceramics, mosaics, sculpture, printmaking, installation, photography and painting- possibly indicating an easier access to resources & infrastructure for some within the area.

Listed artists within this area are spread across Kimberley, Platfontein, Galeshewe, Warrenton, Delportshoop, and Hartswater. The largest concentration of visual artists in this area is found on the Platfontein farm, a centre established for the !Xun and Khwe in the late 1990s following their relocation from the Schmidtsdrift area. Currently there are more than 90 !Xun and Khwe visual artists who make use of the centre, or who are registered on the centre's database. Although these artists work across media which many consider as craft, because this work is exhibited nationally and internationally in established galleries, for the purposes of this study it is considered visual arts.

The Namakwa region poses a similar sort of visual arts concentration as that of Platfontein. Currently, 16 Nama visual artists work from the Steinkopf area alone, with the rest spread over the former labour reserve areas up to Alexander Bay, Port Nolloth, Concordia et al.

The Siyanda district, while preferring to classify many of their artists as visual artists, actually consists more of crafters than visual artists. Because these crafters have however exhibited within formal galleries, for the purposes of this study they are also referred to as visual artists.

This area does not have the characteristics of either Namakwa or Frances Baard in terms of a high concentration of visual artists in one particular area, but is rather more spread out. An artist who has received considerable attention from the Northern Cape Government over the past 3 years, lives and works in Postmasburg. The other artists work in and around Upington, Pabalello, Raaswater, Riemvasmaak, Andriesvale and Kakamas, although they work more within the genre of craft.

Walter Meyer, considered by some as the best landscape painter in South Africa, established himself in Upington in approximately 2006. He operates through the Everard Read Gallery and is possibly one of the most renowned artists of the province.

The Pixley ka Seme and the John Taelo Districts show marginal evidence of artists. Credo Mutwa, living in the Kuruman area is often mistaken as a visual artist while his work is actually linked to indigenous knowledge and healing. A number of crafters from this district have also been placed on a provincial database, however none of these crafters are exhibiting within formal galleries and therefore should

not be considered for this study.

1. The Frances Baard & Sol Plaatje districts (Kimberley, Barkly West)

Information sourced directly from the William Humphreys Art Gallery indicates that there are approximately 13 local artists listed with the Gallery, however it must be noted that this is not representative of all of the visual artists from the area.

The South African San Institute (SASI), operating just outside of Kimberley, has a listing of 92 persons who are considered visual artists owing to the fact that they exhibit a range of goods in galleries nationally and internationally.

The oldest of these artists is 81 years of age, with the youngest being 29 years of age. The majority of the San artists are women, living on the Platfontein farm or living around the Riemvasmaak/Andriesvale/Raaswater areas closer to Upington. All of these artists are !Xun or Khwe speaking.

Artists listed with the William Humphreys Art Gallery are mostly male, living and working in Kimberley, Hartswater or Delporthoop. The majority of these artists are white. No details with regards the ages of these artists was able to be sourced. The William Humphreys Gallery referred us to the chairperson of the Visual Arts & Crafts Forum who in turn did not have much significant detail on artists of the area. From the discussions with the Chairperson it is however apparent that the visual arts forum also caters for the crafts forum hence once again indicating the deep conflation of visual arts and crafts in this province.

The database as supplied by the HSRC team consists of a number of the artists listed on the Arts and Culture Forum database, however it must be made clear that a considerable number of these artists no longer operate through this forum. The initial Arts and Culture Forum database consisted of over 40 members, while the chairperson indicates that current membership is approximately 25 now.

Artists currently operating in this area seem to range in age from 19 years till approximately 60 years of age. Artists in the area consist of black, Indian, San/coloured and white participants.

2. The Siyanda district (Upington, Raaswater, Pabalello, Kakamas, Andriesvale, Riemvasmaak, Postmasburg)

Many of the artists operating from the Riemvasmaak, Raaswater, Upington and Andriesvale areas fall under the listing of the SASI Khomani San group, which at times links up with the N//aoh Djaoh Arts and Crafts SASI group in Platfontein. It would seem that the majority of artists in this area are either black or coloured/ San, with a minority being white. It could however also be assumed that a number of un-listed white artists are also operating from the Upington area, however this study was not able to verify this information owing to distance and cost issues.

Many of the listed artists in the area may fall under the current SASI database held in Platfontein. Almost none of these artists are listed on the N Cape Arts and Culture Forum database – once again affirming the challenges which the province presents in terms of representation when you have geographic distance problems.

Postmasburg has 2 practicing visual artists, Mr Petrus Tshazibane (black) and Mr Leslie Rens (coloured). Mr Tshazibane is approximately 60 years of age, and Mr Rens is approximately 40 years of age. A number of younger craft- artists (black and coloured, from 19 – 40 years of age) work in a DAC funded project under the guidance of Leslie's wife, Minah Rens, in Postmasburg. Kakamas is believed to also have one practising artist.

Walter Meyer, operating from Upington, prefers not to be involved in group/communal initiatives (SANAVA), however he did insist on opening his first exhibition in this area in 2006 in Pabalello.

3. The Namakwa District (Steinkopf, Pofadder, O’Kiep, Concordia, Calvinia, Port Nolloth)

The Namakwa area has 43 practicing artists across the towns of Steinkopf, Poffadder, Port Nolloth, Nababeep, O’Kiep, Aggenys, Kleinzee, Alexander Bay, Bitterfontein, Springbok & Concordia. Calvinia is also believed to have a few artists, however it was not possible to source them at this time owing to distance and cost issues.

None of these artists are listed on the Arts and Culture Forum database.

The majority of the artists from this area are male, all are so called Coloured (although they classify themselves as Nama) and all speak dialects of Nama and Afrikaans as their home languages.

The majority of the artists are found in the Steinkopf area, working across a range of media. The youngest of these artists is 19 years of age and the oldest is 60 years of age.

Similar to the Siyanda District, these artists are not listed on the N Cape list.

The Pixley ka Seme and John Taelo Districts have no Arts and Culture Forum or any other listed artists at all, although it is believed that there are some artists operating in the Calvinia, Fraserberg, Nieuwoudtville. Williston and Sutherland areas. Efforts to find these artists did however not come to fruition and would require actual travel to these areas which is not possible for the scale of this study.

Patterns of Work and Income

Common to all three areas is the differentiation that must be made in terms of a crafter, a commercial artist and fine artist (trained or untrained).

A number of crafters have been elevated to the level of a visual artist owing to their works being exhibited within formal galleries, both within the province, and outside of it. These visual artists work across the mediums of:

- Mixed media – in particular the !Xhun and !Xhwe
- Mosaics – particularly in the Kimberley area
- Papier mache – particularly in the Siyanda district
- Beadwork – the Namakwa district.

On the other hand, commercial artist should be the definition used to define the activities of a number of visual artists across the province. It would be simplistic to categorise these artists as producing work for a hobby or for decoration purposes, as a number of untrained or self-trained artists in the province would by the nature of their work be classified as such despite their objectives of being classified as fine artists.

While the Platfontein project has had skills interventions from artists such as Mark Attwood and the American, Bill Hosterman (both specialising in printmaking), the intellectual framework in the project to utilise this knowledge towards a fine arts stream is not yet in place. Despite the best of intentions, and despite the understanding that the narratives of the works are unique in the sense of the subject matter, the ability to progress and grow with the subject matter and with the medium and with the media is not taking place with this project. Until this project is able to provide participants with access

to skills and knowledge around theoretical and conceptual matter, the project will need to be classified as commercial.

A similar situation exists with the Steinkopf project. Many of the artists operating from the Steinkopf area feel that they are fine artists, despite the fact that they have had no formal training, nor any theoretical framework. The body of their work is however commercial. The want or need to be classified as a fine artist rather than as a commercial artist also seems to stem from the classification system which the provincial department of arts and culture has placed on this area in terms of selection. Many of the artists feel slighted in that the department continues to view their work as 'not good enough' based on the fact that they have not had formal training and therefore cannot be classified as fine artists.

Fine artists in the province on the other hand are the artists who are pursuing the art form within both a conceptual and intellectual framework. It would be fair to say that this category of artist is almost non-existent in the province, largely due to the fact that there are no tertiary institutions offering this as a field of study. Kimberley is home to two artists who are exploring issues around conceptual art and photography, however this does not seem to extend further in this area. Walter Meyer would be considered the most prominent of all the fine artists working in the province.

Those who wish to pursue the fine arts as a career generally study outside of the province, and do not return to the province owing to the lack of a market place in the province.

Income

It seems that artists in the Kimberley area who had been producing ceramic ware and painting, were making a living from their art prior to the recession. This work was however largely commercially oriented. The same cannot however be said for the other artists of the Frances Baard and Sol Plaatjie areas.

Artists working in Galeshewe it seems have not ever made a substantial living from their art, much of this as a result of the limited marketing opportunities afforded to them in addition to them not being able to access broader markets.

Artists in this area have rather come to rely on using their knowledge of creativity within other projects such as that of the Legislature project, the urban renewal project of Galeshewe etc. Mosaics are a main feature of this area and were re-invigorated with the Legislature project in the early 2000s.

On the whole however, these projects are often not accommodating to local artists, hence the reality of many of the local artists having no source of income at all.

Despite the !Xhun and !Xhwe artists being nationally and internationally recognised, they are not self sustaining. Instead it seems that this project is constantly teetering on the point of financial collapse. Although the project held a well publicised exhibition in May 2009, the project failed to sell work.

Artists in the Namakwa region also struggle to make a living, with many of these artists having given up practicing a while ago. Those who continue to work, rely on two market streams: the first being tourists travelling up to Namibia or the Richtersveld and the other being the local community who seek family portraits and the like. While this local support is there, the local community is often however not able to pay market related prices for the work, leaving the artists needing to seek alternate forms of income which in itself is a struggle. In addition, tourism is largely a seasonal issue, not allowing a sustained form of income to happen.

Artists in the Siyanda district generally rely on the provincial or national department of Arts and Culture to offer them opportunities for marketing at events such as the One of a Kind, the Rand Easter Show or other DAC related events. These artists have even less of a chance of selling work than in the two other areas.

Being an established artist with no dependence on local markets, Walter Meyer is probably the only artist in the province actually being able to make a living off his work currently.

In general, artists from this province do not make a living from their art, nor are they able to get other jobs owing to job scarcity issues in the province.

Skills Gaps

Artists working in the Frances Baard & Sol Plaatjie areas as well as those working in the Namakwa areas identified similar skills development needs. These included:

1. Technical skills in the Visual Arts: across a range of media including drawing, painting, sculpting, printmaking, photography.
2. Theoretical skills: being able to understand a 'little bit about history' and "what made other artists great"
3. Quality training: how to finish products off to quality standards
4. Framing & mounting
5. Business skills
6. Exhibiting and display skills
7. Marketing and selling skills
8. Customer care
9. Pricing
10. Fundraising
11. Financial management
12. Project management
13. Effective communications

Artists working in the Siyanda district identified skills more to do with marketing and financial management than with technical skills, once again indicating this area's leaning more towards the craft than visual arts sector. However, for artists like Mr Tshazibane and Mr Rens, issues like peer evaluation, critical discourse and documentation seem more needed.

Access to markets

Market access is a major problem for artists from this province. This is largely tied to the geographic distances people have to travel to get to the market as well as the opportunities that each area is offered in terms of a market.

Each area seems to have its own understanding of what or who the market is, although a common understanding of the opportunities that the provincial department should be offering to artists is common.

All artists agree that the department is important in terms of providing a platform for artists to attend marketing events across the country. Artists generally also feel that the department should be developing more local marketing opportunities which would strengthen the sector in the province and in their districts rather than only relying on the exposure that the artists get when they travel to events such as the One of a Kind Show for example which many feel are not sustainable over the longer term.

Two main types of market access opportunities exist for artists in the province. These are:

1. Government led interventions: Such as the One of a Kind/Handmade in SA event in August;
2. Festivals: Over the past several years, towns across the Northern Cape have developed a range of festivals, many of which offer opportunities for artists to showcase and sell their work.

Many artists feel that the Department has not opened access broadly enough for all artists in the province to opportunities such as that of the One of a Kind Event. Rather it is felt that the same artists get the opportunity year after year without consideration of others.

Artists also feel that the provincial department should also assist them in creating networks to the festivals as many of these events are run privately and need a facilitating body to assist the organisers to see the value of the arts.

The William Humphreys Art Gallery holds an annual exhibition showcasing provincial artists, however many artists from areas such as that of Namakwa and Siyanda cannot get work to this annual exhibition owing to the cost and distance issues. The only other gallery in the province is that of the McGregor Museum's Duggan Cronin Gallery, although this focuses solely on photography. This gallery was recently host to the photography exhibition of the Standard Bank Young Artists Award Winner for 2008.

Artists in the Northern Cape largely rely on framing shops, florists, gift shops and coffee shops as gallery spaces, however informal.

The following table represents the outlets commercial artists attempt to use in finding alternate platforms for the showing of their work:

Title	Name of centre	Town	Physical address	Tel number
Gift services	Die Sotkysie	Dibeng	25 Main Street	053 791 0286
	Lizzie's Arts and Gifts	Upington	54 Le Roux Street	054 332 2118
	Cardies	Kimberley	13563 Oliver Road, Diamond Pavillion Mall	053 832 7972
Gift Shops	Leopards and Lillies	Kimberley	223 Du Toitspan Road	053 831 5369
	Mark Henderson	Kimberley	61 Long Stret	053 832 4971

	Florist			
	McGregor Shop	Kimberley	2 Egerton Road	053 832 2457
	Sugar and Spice	Kimberley	Rhodesdene, Pick 'n Pay Centre, Carters Road	053 861 1616
	Crazy Store	Postmansburg	33 Hoof Straat	053 313 3304
	Polfyntjies Geskenkwinkel	Postmansburg	15 Bo Straat	053 313 2231
	Greenhouse	Upington	14945 Le roux Street	054 332 3737
Home industries shops and co-ops/ tuisnywerheid	Karlientjie Tuisbedryf	Springbok	3 Luckhoff Street	027 712 2238
	Kalahari Tuisnywerheid	Upington	Pick 'n Pay Centre	054 331 1331
	Coffee in Africa	Warrenton	30 Uys Street	053 497 5651
Florists	Lente Bloeisel	Danielskuil	Barker Street, Box 86	053 384 0916
	Bloomingdales Florists Nursery	Douglas	Box 169	053 298 1848
	Yanuck	Kakamas	36 Voortrekker Street	054 431 0788
	Bella's Florist	Kimberley	1 Lex Building, 5 Permanent Way	083 673 3274
	Mark Henderson Florist	Kimberley	61 Long Street	053 832 4971
	Cottys Interior	Kimberley	5 Pick 'n Pay Centre	053 831 2604
	Interflora African Areas Ltd	Kimberley		082 231 4200
	Kimberley Bommemark	Kimberley	6 Long Street, Albertynhof	053 831 4433
	MacKintosh's Florist and	Kimberley	Shoprite Centre, Bultfontein Road	053 831 8117

	Gifts			
	Springbok Bloemiste	Springbok	8 Andia Centre, Voortrekker Road	027 712 1660
	And Lemon Bloemiste	Upington	19 Le Roux Street	054 332 5355
	Crazy Daisy Flowers	Upington	49 Schroeder Street	054 332 1130
	Orange Blossom Florist: Anchoeley Bldg	Upington	Market Street	054 332 2551

Steinkopf used to have a gallery for artists and crafters, funded by DAC, but this has been closed in the past 2 years. A private gallery has been founded by two local artists of the area, although this needs support.

The areas around Sutherland, Williston, Carnarvon, De Aar and Victoria West are not generally known for the visual arts, with more of a slant towards that of craft than the visual arts. At one stage it is believed that the Art Deco movie theatre in Victoria West hosted a few visual arts exhibitions, although this no longer takes place.

There are currently only two artists having access to galleries/agents. These are Walter Meyer and his relationship with the Everard Read Gallery and SASI who work with the Kim Sacks Gallery as well as international galleries. While Meyer moved into the province with the relationship in place, SASI established this relationship with galleries as a result of its linkages to other artists such as Mark Attwood etc.

Raw Materials

Raw materials are generally imported to the province. Some outlets in Kimberley, like a stationery shop and a framing shop, have realised the market need for artist's materials and have stocked them. However, for the majority of artists, they have to source their materials from other provinces. The artists working on the Steinkopf side need to get their materials from Cape Town, while those on the Kimberley side get theirs from Johannesburg. The types of materials that the artists are purchasing are however generally not of a very high quality owing to the expense of the materials and the costs in getting them into the province.

Projects like that of SASI or the N//aoh Djaor Arts and Crafts project in Platfontein have had instances where galleries or professionals will bring the materials in themselves to these areas and subtract these charges once the work is sold.

School learners, commercial artists or artists not able to import raw materials, to a large degree rely on outlets ranging across stationery shops and frame shops to supply raw materials in terms of brushes, paper, cheaper paints, pencils etc.

The following table provides an understanding of the possible outlets for materials, and framing etc:

Title	Name of centre	Town	Physical address	Tel number
Art Suppliers (Curio Dealers)	Victoria Trading Post	Victoria West	24 Helpmekaar Street	053 621 0353
	Kgalagadi Curio Shop	Upington	Box 1863 Kgalagadi	054 561 0060
Frame Shops	Dial a frame	Kimberley		079 491 7122
	Classical lines	Kimberley	29 Angel Street	053 831 8675 Cell: 083 456 6121
	Louise Frames	Kimberley	Choctaw Spur Complex	053 832 3421 Cell: 083 441 4034
	Frames Studio	Springbok	Luckhoff Street	027 712 2246
	Panorama	Upington	65 Schroder Street	054 332 4359
	Stolper & Seun	Upington	31 Schroder Street	054 332 1692
Craft Shops (Fabric and crafts paints)	Esna Crafts	Kuruman	6 Melville Street	053 712 3674
Stationery shops	Waltons Stationery (Pty) Ltd	Kimberley	11 South Circular Road	053 831 1971
	@ world office	Kimberley		053 831 6011
	Claron Stationers	Kimberley	25 Petunia Road , Squarehill Park	053 871 3037
	Uhuru Books and Stationers	Kimberley	Trevenna Centre, Builtfontein Road	053 831 8917
	Walton Stationery (Pty)Ltd	Upington		054 332 4137
	@ world office	Postmansburg	12 Randjie Street	053 313 0462
	@ world office	Kuruman		053 712 2063

	Chekkat Agencies CC	Kuruman	34 Beare Street	053 712 3077
	Copiare	Kuruman	42 Steward Street	053 712 2725
	Office World	Kuruman	26 Steward Street	053 712 2063
	DCL Computers and Stationery	Kuruman	1 Brink Street, Wrenchville	053 712 1078
	Fox Books and Things	Kuruman	48 Steward Street	053 712 2542
	Speedy Stationers	Kuruman	2432 Produkte Road, (Industrial Area)	053 712 1020
	CNA Pty Ltd	De Aar	46 Voortrekker Street	053 631 3182
	JSE Stationers	De Aar	59 Main Road	053 631 2792
	Vinos Stationery & Bookshop CC	Hartswater	1 D F Malan Street	053 474 1718
	Kakamas Stationers	Kakamas	Business Centre Sultana Avenue	054 431 1523
	PDL Stationers	Lime Acres	Central Avenue	053 385 0317
	PA Stationers and Quick Print	Upington	46 a Scott Street	054 332 2041
	CIA Stationery	Warrenton	65 Uys Street	053 497 5326
	Warrenton Skryfbehoeftes and glass	Warrenton	54 Van Wyk Street	053 497 3311
Stationery Wholesalers	Freedom Stationery	Johannesburg		011 314 0953
	Kismet Stationers	De Aar	Kismet Stationers	053 6312786
	Aery Stationers CC	Kimberley	2 Community Road , Florianville	053 874 1557
	Full Swing Trading 18 CC	Kimberley	508 Flaxey House, 30 Du Toitspan Road	053 832 1318
	Stationery King	Kimberley	8 Roper Street	053 832 4222

The Market

Market concentration in the Northern Cape is in Kimberley, although Upington has over the past several years been considered to have a higher GDP than Kimberley. The concentration in Kimberley is more related to the fact that it is the home of the only two galleries in the province.

Upington on the other hand has in the past utilised the space of the museum for the showcasing of works, although this has largely died out over the past several years. The provincial budget speech indicates that the Upington museum space will be refurbished in this financial year, possibly opening the opportunity for visual arts to find space again. When Walter Meyer opened his first exhibition in Upington in 2006, he made use of a community hall in the township of Pabalello.

The Northern Cape currently has no art route, or specific visual arts marketing events. The visual arts are rather slotted in to larger events such as the Festival in August, taking place in Kimberley, the largest of the Northern Cape festivals.

The Northern Cape generally has a healthy range of 'town festivals' taking place. These are as follows and are becoming popular, especially in the light of the heightened focus of tourism on this province.

January

- Richmond Show (053 6912)ask for 2004

February

- De Aar show (083 406 0730)
- Victoria West Show (053 621 0222)
- Changing of the Guard (053 831 4006)
- Hopetown Show (083 454 9471)
- Kuruman Show(053 712 1001)

March

- Carnavon Show (053 3823426)
- Vosburg Show(053 6750018)
- Griquatown Show (053 343 0092)
- Boerbok Festival –Olifantshoek (053 331 0103)
- Vanderkloof Water Festival (053 664 0015)

April

- Britstown show (053 67120 ask for 163)
- Microlight Rally- Carnarvon (053 383 3479)
- Diamonds and Dorings Music Festival (053 832 7298)

May

- Douglas show (053 298 2817)
- Kalahari Wild and Wynfees-Kuruman (053 712 1001)
- Rubber Dingy Championships- Hopetown (053 631 0891)
- Ulliyisees Motor Cycle Rally-Colesberg (051 753 0406)
- Upington Show (082 491 7565)

June

- Witsand Desert Classique- Witsand Reserve (053 3131061)
- Apollo Wilfees Film Festival- Victoria West (053 621 1185)
- Victoria West Game Festival (053 612 2112)

July

- Drama Festival- Fraserburg (023 741 1111)
- Kareeberg Arts Festival-Carnarvon(053 382 3441)
- Meat Festival-Calvinia(027 341 1794)
- Gariep fees –Kimberley(082 878 2786)

September

- Gariep fees- Kimberley (082 878 2786)
- Daisy Marathon (027 712 2011)
- Prieska Show(053 353 3501)
- Harley Davidson Rally- Colesburg (051 7530406)
- Kameeldoringfees- Kathu (083 309 2164)
- Apollo Film Festival -Victoria West (053 621 1185)

October

- Kimberley Show (053 833 3581)
- Kathu Show (053 712 1001)
- Kalahari Kuierfees –Upington (054 3321100)
- Ysterspan-Upington (054 332 5911 x2158)
- Barney Barnato Golf Week

November

- Cultures and Vultures Week – Kimberley (053 833 1434)
- Namaqua Show- Springbok (027 7182986)

December

- N12 Promotion- N12 (053 833 1434)
- Jones Street Mall –Kimberley (053 832 7298)
- N12 Summer Youth Festival –Victoria West (053 621 1185)
- Magersfontein March- Kimberley (053 831 4006)
- Vanderkloof Holiday Programme (053 664 0198)

Displays of artworks at these events usually focus on commercial aspects of the visual arts, and provide possibly the only form of platform for many of the untrained artists of the province.

Audiences and consumers base

The Northern Cape is currently not a viable market for the visual arts, mostly owing to:

- A lack of awareness of the value of collecting the visual arts
- A lack of galleries promoting the visual arts
- A lack of tertiary institutions enabling the longer term sustainability of the arts
- Historically, a market bent more towards agriculture and mining than 'luxury'.

Projects like the Platfontein Artists under SASI, who are nationally and internationally recognised, struggle to sell visual arts in the province. When sales are made, it is mostly tourists or international buyers who are able to recognise the value of the work. SASI is linked to the Kim Sacks Gallery in Johannesburg, as well as to some international galleries, although sales are not made on a sustainable level.

Artists from the Namakwa district are able to sell work to locals, however they have to dramatically cut their prices for sales. A similar situation happens to artists operating from the Galeshewe area in Kimberley, as well as the artists practicing in the Pabalello area of Upington.

White artists in Kimberley, Hartswater, Delpportshoop and Upington, who produce a more commercialised art from, have in the past been selling through the coffee shops, or frame shops of their areas. This has taken a knock over the past year however owing to the recession.

The William Humphreys Gallery is reasonably well attended given the population size of the town. The openings of exhibitions are usually very well attended, with the gallery having built up a database of friends and supporters. The average attendance at an opening can range from 60 persons up to 400 persons or more, depending on the event. Many of those who attend are however not buyers of work, but rather supporters of the gallery's initiatives.

The biggest challenge that is faced by gallery's and artists in the Northern Cape is the issue of an awareness of the role that the visual arts play in society.

As indicated previously, the only artist living off the visual arts is Walter Meyer, who works through an established gallery and is not dependent on the province for sales.

Linkages with other sectors

It would seem that because of the lack of awareness of the number of visual artists in the province, that the visual arts generally do not feature in tourism initiatives.

When the province hosts tourism festivals, the focus is more on a 'geselligheid' than on providing platforms for the arts. The largest festival in the province, which takes place in Kimberley in August, the Gariep Fees, focuses more on film than any other form of the arts.

The Department of Arts and Culture hosts a number of festivals as well, however these tend to focus more on the performing arts, literature and music than the visual arts. The database acquired from the Department generally also shows a lack of awareness of who the practicing visual artists in the province are.

Art Collections

The William Humphreys Art Gallery is a Grade 1 resource, making it of great significance for South African Visual Arts, however the ability of the gallery to continue collecting is thwarted by a lack of collections budget.

The Duggan Cronin Gallery is another significant provincial collection, however again, owing to budgetary issues, they cannot collect.

De Beers does support the William Humphreys Art Gallery at times in the showing of work, however this is not generally towards collecting purposes.

Education and Training

The Northern Cape has no tertiary institutions offering visual arts qualification training in the province. The only training provided is that through the Kimberley Art Centre which focuses on arts education at a school level.

Title	Name of centre	Town	Physical address	Tel number
Art School	Art centre	Kimberley	31 Scanlan Street, New Park	053 832 2076
Arts and crafts tuition	Creative Image Craft Painting Studio	Kimberley	20 Outenique Avenue, Cartersglen	053 861 1523
	Creative You	Kimberley	Schreiner Street, Hadison Park Scentre, Hadison Park	053 861 4509

The majority of the residents of the province cannot actually afford to study post schooling and should they get a chance, it is unlikely that they will study in a field which they have little understanding of, such as that of the visual arts. This is a serious problem in the N Cape.

The majority of visual artists in the Siyanda District are self trained, as are the artists in the Namakwa district.

Artists in the Frances Baard and Sol Plaatjie Districts are also generally self-trained, however this area has received a lot more opportunity than the other areas in terms of workshops and skills programmes. VANSAs N Cape together with the William Humphreys Art Gallery run workshops for artists and crafters. The Department, through the Mayibuye Centre is currently also developing a workshop programme, with the latest having been a workshop on ceramics. None of these workshops are however accredited training programmes.

The province has never had any accredited visual arts skills programmes. It has however had two FET sites which offered craft production training through the CreateSA project and one project which operated from the William Humphreys Gallery aimed at training crafters in marketing (also CreateSA).

Of all of the learners undergoing SETA accredited skills training, only one has continued in the visual arts – Benjamin Taku. Ben is a self taught artist however and was practising as one prior to the training. He did not continue with the craft skills acquired and continues to try and market himself as a visual artist. This craft training took place at the FET college in Galeshewe, Kimberley, and at the FET College in Kathu.

As the CreateSA training in the province generally was not visual arts specific, the rest of the question above is not relevant to this province.

Development Initiatives

Currently the provincial Department is focussing on the development of the Mayibuye Centre as 'the' development initiative for the province. It is not possible for us to ascertain how much budget has been apportioned to this project.

Artists spoken to however do not see the relevance of the centre generally, nor do they understand what difference the centre will make to the visual arts. The centre has no studio's, it does not attract visitors, it expects local artists to pay high fees for hiring of space for which they have no money for.

Artists in the Upington area indicate that a similar idea has been mooted, or is currently in the process of formation. The municipality has had the idea to support the arts better and at one stage spoke of developing an arts and crafts centre. This has however never come to light. Again, this initiative is linked with a tourism budget and not a visual arts budget.

The Namakwa District Municipality took an initial interest in the visual arts over the 2005/06 period and at one stage provided artists with stalls along the tourist routes of the area. This interest was however spurred on more by the fact that visual artists could be used to attract tourists. Funding for this initiative came through a tourism budget. This initiative was however was not a sustained initiative and many of these artists could no longer afford the stall hire once the municipality pulled out. The impact of the municipality pulling out has been severe. Many of the artists in this area feel left out and even abandoned by government and following this incident and that of the closing of the DAC funded arts and crafts centre, many artists in the area stopped practicing the visual arts.

Artists in general feel that much more emphasis and money and development takes place in Kimberley at the expense of the other areas. The majority of municipalities cluster arts and crafts under tourism budgets.

Perhaps the strongest development initiatives in terms of the arts and crafts has rather come through the FET Colleges of the province. Over the period of 2004 – 2006, a number of Colleges ran skills training programmes, particularly in craft. One took place in Upington, another in De Aar, the other in Kathu and the last in Galeshewe. What is significant about these programmes is how the Colleges attempted to really make a difference through the arts for the areas surrounding the areas. All of these programmes were funded by CreateSA.

Artist Associations

The only artists association in the province is that of the Visual Arts and Crafts Forum. The 2008 SANAVA national annual report indicated that the new chairperson, Tshepo Molusi, was breathing excitement into the organisation. The stretch of this association is however limited to the geographic regions around Kimberley. Artists operating from the other districts do not have representation on this association, nor do they have their own associations.

A number of artists in Kimberley feel that the organisation is not yet able to assist them in their endeavours in the visual arts as it does not have a strong enough influence. These artists wish to remain anonymous. A problem with the SANAVA or Visual Arts and Crafts Forum is exactly that it is a forum for both the visual arts and crafts.

The forum currently, in partnership with the William Humphreys Art Gallery, offers various workshops with the latest having been a cement sculpturing workshop, supported by PPC and the Provincial Department of Arts and Culture.

Other activities undertaken by the forum are said to include:

- Staging exhibitions with WHAG annually
- Hosting workshops on a monthly basis with different artists as facilitators in order that artists can share their skills with each other. These workshops focus on the media of sculpture, oil

- painting and charcoal.
- Securing funding from stakeholders for training workshop purposes

The Role of Government:

The Visual Arts and Craft Forum is understood to receive assistance from the Department, but mostly in the form of marketing, not in the support of individual artists. We have struggled to find out what the support is in terms of finances however.

Artists in the Kimberley area indicate that the support the department is offering to them at the moment is in the form of space to exhibit and sell at the Mayibuye Centre, however that this space is not well supported by visitors and the hiring prices are too high for the artists.

Artists across the province, who have had contact with the department, generally indicate that support has been in the form of getting a chance to show work at a 'fun fair' or the One of a Kind show or the Rand Easter Show and the like. However artists are generally very unsatisfied with the manner in which they have been handled by the Department, with much of this dissatisfaction resting on the issue of the Dept taking their works for exhibitions in places they are not told of, being informed that the works have been sold, and then not being paid. This complaint was found across the province. We were not able to verify these complaints owing to new personnel being in the department.

Municipalities generally do not support the visual arts, with no allocations being found in their budgets for the visual arts either. Where support has come forth from municipalities for the visual arts, it is rather as a result of a tourism initiative which has provided some opportunity for local artists. It would seem that the province has become and is totally responsible for the development of the visual arts in the province.

Key informants:

- *Pierre Cloete: Steinkopf artist: 076 688 4799*
- *Kegomoditswe Maruping: 072 157 5159*
- *Tshepo Molusi: Visual Arts & Crafts Forum, Kimberley: 083 7244 963*
- *Petrus Tshazibane: Postmasburg artist: 078 553 4472*
- *Rika, William Humphreys Art Gallery: 053 8311 7245*
- *Kyle, N//aoh Djaoh Arts and Crafts: SASI: 078 185 1194*
- *Neo Poolo, Sol Plaatjie Tourism: 071 686 6850*
- *Dr Leon Jacobson, McGregor Museum: 053 – 8392700*
- *Artists who wish to remain anonymous*

VI: Free State Report

Overview:

The current situation of the visual arts sector, identifying strengths, weaknesses, opportunities and threats in the Free State can be described as:

- **Strengths** – Free State province is home to a number of practicing visual artists, working across a range of media. The province has over the past two years also been classified by SATourism as a fast growing tourist destination, hence the opportunities for the development of the visual arts to complement this growth is very positive. Funding does reach the province and is perceived to be a valuable contribution to the visual arts. The Oliewenhuis Art Museum should also be considered one of the jewels of the province with reference to visual arts development, education and community outreach.
- **Weaknesses** – Government, tertiary institutions and other visual arts entities like galleries and museums do not always provide adequate access opportunities, have enough personnel or assistance to develop the untapped talents of the province. Most of the mentioned role players are under staffed and this impacts on the role that they should be playing within the development of the visual arts in the province.
- **Opportunities** – The province is home to a number of established tertiary institutions which should be better utilised for development purposes as well as a sectoral stabilising factor. These institutions, together with partnerships with Oliewenhuis Art Museum and the Mmabana Cultural Centres and FET Colleges, could also assist in the implementation of new ideas for the visual arts industry.
- **Threats** – One of the major threats perceived in the province is when government believes that they can do everything on their own and when tertiary institutions believe that academic training is the only measure of success. Artists of the province rather believe that stakeholders have to meet at the different crossroads in finding the right path that will benefit the various needs within the visual art industry. One of the issues consistently raised in that stakeholders need to find means to maintain continuous communication and to work towards objectives within specified timeframes. Many artists feel that a big threat to the sector is also the lack of continuous support experienced in the province.

The Position of Artists

Bloemfontein and its immediate surrounding areas have been identified as host to the main cluster of artists working in the province. This is due to the fact that Bloemfontein has three institutions (University of the Free State Fine Art Department, Central University of Technology – School for Design Technology and Visual Art's Fine Art Department and Motheo FET College Art Department) teaching visual art as well as some smaller informal art schools focusing mainly on school learner development and hobby artists. Nellie Brisley and Eezet Fourie are some of the major role players in this informal school learner development in the Bloemfontein region.

Goldfields FET College situated in Welkom and Mmabana Cultural Centre, Thaba Nchu and Mmabana Cultural Centre, Sasolburg are the only other major visual arts institutions providing for visual art development outside of the Bloemfontein area. Contact between these institutions and the Bloemfontein institutions seems to be non-existent due to the distances from each other as well as Welkom and Sasolburg's locations being closer to Johannesburg, believed by many artists to be the main art centre.

Amongst the Free State cluster of artists, many are found to be engaged in commercial art

production, craft and fine arts (this group includes both trained and untrained/self taught artists). Artists living and working in the rural / platteland areas are few and far between, scattered over the province with small groups residing in Welkom, Bethlehem – Clarens area, Thaba Nchu – Botshabelo area and some individuals in Phuthaditjaba, Witsieshoek, Harrismith, Ladybrand, Kroonstad and Parys.

Regional profile of Free State Artists (age, gender and race profile of the artist population)

The main cluster of artists in the province is situated in the Bloemfontein area. The table below is based on age, gender and race.

	AGE	GENDER		RACE		
		MALE	FEMALE	BLACK	COLOURED	WHITE
51 and older	6	4	2	2		4
41 – 50 yrs	30	25	5	20		10
31 – 40 yrs	37	24	13	18	1	18
21 – 30 yrs	29	17	12	19		10

*The above table include visual artists, crafters, art educators and art project facilitators registered at Oliewenhuis Art Museum and VANSA Free State branch.

From the data available during the compilation of this report the following can be assumed: 102 Individuals are registered with organisations as visual artists, crafters, educators and art project facilitators in the Free State Province. It is however not clear how many are active as visual artists in their own right. Estimated 20 – 30 artists (black and white) are not registered on any of the available data base networks. Some of these include known and unknown but established local artists would include painters, ceramists / traditional potters, arts and crafts artists from rural and urban areas.

Percentage breakdown of the above table.

Age:

51 years and older – 5.88%

41 – 50 years – 29.41%

31 – 40 years – 36.27%

21 – 30 years – 28.43%

Gender:

70 Male - 68.62%

32 Female - 31.37%

Race:

59 Black – 57.84%

1 Coloured – 0.98%

42 White – 41.17%

93 Registered artists – 91.18% (including 11 Free State woodcarvers – 10.09%)

9 Art educators and facilitators – 8.82%

The age group of 18 – 20 years has been left out since many of these young student artists have not yet completed their studies and most of them will probably end up in a different

segment of the private sector due to financial difficulties and implications; including for many, a change in study direction.

Art students who do complete their studies still need to participate and produce towards art exhibitions and are therefore not officially classified as established artist/s. Young upcoming untrained or self taught artists from rural and disadvantaged areas remain as unknown artists until they get exposure and are recognised for their individual talent. This group has also been omitted from the above regional profile list.

Patterns of work and income among artists

An estimated 10% of the province's artists rely solely on earning a living from their visual work. This includes trained and untrained visual artists. An estimated 3 – 5% earns a significant income from their work. These artists either have financial back up, had their big break or are willing to sacrifice their time because they believe in what they are creating. Success to these artists is not necessarily a prerequisite but earning a living comes first.

Various rural and urban woodcarvers from the province do have another job to supplement their income and rely on selling their work at Oliewenhuis Art Museum, to individual collectors and craft/art markets, which at times provide a limited income.

Therefore an estimated 90% of artists living in the province do not earn a living from their visual work and must subsidise their visual work through a fixed or informal income.

Well established and known artists, like Ben Botma, Jaco Spies, Penny George, Carol Kühn, Janine Allen Spies and Gerhard Hattingh have a particular managerial and/or teaching responsibility besides their visual art production and are involved with one of the three art institutions in Bloemfontein. Commercial artists on the other hand have to produce and exhibit at cultural festivals, markets and shows on a continuous basis. These are the artists that have established a clientele over a period of time and sell their work on a provincial and national level. None of these three groups have a complete and ideal situation and must sacrifice something in return to support themselves.

Common problems that artists face in pursuing their work, including skills gaps, access to markets and raw materials

For the purpose of this report it is important to firstly identify and clarify the term 'skill'. According to various artists interviewed problems arise on different levels and in different situations. The following three areas of the skills gap have been identified: technical skills, intellectual skills and marketing skills.

Technical skill would be the ability of an individual artist to successfully master the material and tools (including equipment) that he/she may use. Intellectual skill would refer to an artist's individual, intellectual and personal ability to conceptualise and contextualise the main idea or concept that he/she might work within an artwork. Market skill refers to the artist's ability to make use of marketing and relevant marketing tools to access a particular market, venue or gallery of his choice to sell his/her works.

Most rural and urban untrained artists in the province (irrespective of age and gender) face the skills, access to markets and raw materials problem as well as sustainability, poverty and appropriate materials for the appropriate piece of artwork. It has been found that many artists and crafters use whatever material is available and their skills develop accordingly. Material choice dictates skill, use of equipment and tools. Many local artists do not have access to facilities, professional guidance, and variety of materials, exposure and financial backup.

Therefore the refinement of final works and marketability of these works becomes a major problem.

It is however important to emphasise the fact that even trained artists sometimes overlook their material's suitability, its advantages and disadvantages. Once the understanding and knowledge have been established an artist can identify suitable production methods and acquire the necessary skills to work with a specific material/s. The rising costs of art materials, equipment and tools however prevent many artists from exploring materials and their visual possibilities. This is probably the major contributing factor to why many rural artists stay with a particular medium and are reluctant to try something new (familiarity breeds content). Setting up a professional art studio has therefore become out of reach for many young upcoming and even established artists.

Studio space and professional facilities for artists to work in, besides the major art institutions, is almost non-existent. There is a need for affordable working space by trained and untrained artists and the 'beehive' or artists in residence concept has captured the imagination of lots of urban and rural artists. Working as individuals, but also in a group environment will stimulate the use of traditional and new skills, materials and equipment, stimulate idea generation and concepts, stimulate exposure and new trends, and stimulate networking and communication with relevant partnerships.

It has been found that younger artists in general have a lack of understanding of their own culture and heritage (including Indigenous Knowledge Systems), a lack of observation of their environment (physical, social, historical, religious and political to name a few) and in turn a lack of knowledge to process materials, ideas or the ability to generate visual work which is relevant to the current South African genre. Art students continue to look towards European and American trends in the arts and are at times blinded by art history, art theories and philosophy from the western world. Untrained artists on the other hand somehow have at times the 'advantage' of not knowing the content of art history and they can capture a simple yet striking idea with sharp and clear vision and use appropriate materials.

Various artists in the province believe that there is a place for both traditional and contemporary art genres to exist side by side. The overall belief however is that there is a lack of communication between artists in the province and national gallery owners, government and their departments. These major entities seem to operate exclusively while artists feel as if they function 'on the brink of oblivion'. Artists do not trust gallery owners due to the long waiting periods between works being accepted on consignment basis and payment received. Major galleries also have very high commissions and levies that discourage artist to exhibit elsewhere. Trained and even self taught artists are reluctant to use agents and the overall marketing of their work collapses. Most artists do not have a marketing personality and must rely on their own luck or word of mouth to get their works out there in the market place. Marketing and exposure skills are important aspects that lack in the province and skills development workshops could be developed to address this aspect.

Some Free State artists has expressed their concern about the local Department of Art and Culture's expertise levels and inability to include all artists of race and gender when it comes to arts development in the province. It seems that each new development strategy revolves around the same disadvantaged groups. The linkage and partnerships between government, academic institutions and independent / dependant artists should be addressed.

The Market

Areas of market concentration across the province: gallery clusters, art routes, open air art markets, festivals and events

Oliewenhuis Art Museum and Stegmann Art Gallery (a university gallery and collection) are the two major museum/galleries in Bloemfontein and the Free State. Both invite established artists to exhibit and any new or established artist may exhibit once their work has been accepted by the museum or gallery's individual board members. Younger or inexperienced artists have the opportunity to enter their work for Fractal's annual Young Artists Group Exhibition (Fractal is a forum for young artists and an affiliate of the Friends of Oliewenhuis Art Museum).

Clarens in the Eastern Free State is known for its gallery clusters consisting of commercial galleries like Al Tiley Gallery, The Art & Wine on Main and The Enslin Vorster Gallery and fine art galleries like the Johan Smit Gallery. These galleries offer a variety of work which range from very commercial visual work to the works of well established South African artists and crafters. The craft market situated in Clarens also offers a variety of crafts and is a popular tourist attraction.

The Volksblad Art Festival and Macufe Festival (Mangaung Culture Festival) are the only two festivals held in Bloemfontein each year to attract tourists and locals and create an opportunity for visual artists to sell their work. These festivals are held in July and September respectively. The Volksblad Art Festival is similar to the other popular festivals like Grahamstown, KKNK and Aardklop but has not yet reached the critical mass or impact of the three aforementioned, established culture festivals.

The Macufe Festival has its focus on the black community and caters mainly for performing arts, although crafters and artists do get the opportunity to exhibit and sell their work. Both festivals however lack partnerships with the main stream of visual arts in the province and elsewhere. The Volksblad Festival focuses mainly on commercial artists and a few fine art side shows. The lack of sponsorships and partnerships as well as a lack in art education on the side of the organisational structures may be the cause of this.

Various commercial galleries like Bovidian Art Gallery (Bloemfontein), De Oude Wagenhuijs (Phillipolis), Catz Coffee Shop & Art Gallery (Bethulie) and The Plum Tree Coffee Shop and Art Gallery (Parys) provide a space for commercial untrained artists to exhibit and sell their works. These galleries are usually well supported by the public and tourists. While the untrained/self taught artists are able to exhibit and sell their works in these galleries, the trained artists usually have to resort to other venues to exhibit their works and market themselves. Privately owned, reputable and established fine art galleries in the province are very limited.

Audience and consumer base for the visual arts in the province

To establish a clear audience and consumer base in the province it is important to differentiate between fine art and commercial art, since the difference between the two is not always distinct to the untrained. Trained artists and/or self taught established artists would aspire and work towards exhibiting the works in a reputable and recognised gallery / museum, whereas commercial artists and some crafters would exhibit in any gallery or venue that will give them the most feet, exposure and income. Commercial artists consider visual arts production as a form of income opposed to fine artists that take their subject matter very seriously and working towards recognition of skill, concept and ultimately national recognition as a fine artist.

From the amount of commercial art galleries throughout the province one may assume that there is a much larger market for commercial work than fine art – traditional and contemporary works. Whether these commercial galleries are viable and successful is not clear and the current trend is to have an additional form of income joined with a gallery concept for example

a coffee shop and a commercial gallery on one premises. The one business would therefore subsidise the other and make it sustainable. The attendance is then much higher with the attraction of the coffee shop. As with the rest of South Africa, where collecting art is not a priority within society, most South Africans consider art only to beautify one's own environment, thus enabling that the commercial art market is stronger than the fine arts market. This is also hinged on the lack of an education of the value of the visual arts to society in general.

The viability for fine arts as a viable economic sector in the province is however doubted. Although Oliewenhuis Art Museum, as an established and reputable art museum and gallery, had 125 203 visitors in the period April 2008 – March 2009, it is important to remember that their aim is to collect, curate, educate and engage the community in the arts and is not focused on selling artworks for a sole income. This is similar for Stegmann Art Gallery that collects from an education point of view and is used as a facility for the university's fine art department. Sales exhibitions are held regularly at both venues to supplement their funds to purchase contemporary art works for their collections.

The question raised as to whether the province has a viable market for visual arts, would be both yes and no. This depends entirely on if the artist is established or not as most galleries will not entertain upcoming artists if their work is not up to the standards prescribed by the galleries. Some established artists in the province have however done well for themselves as independent visual artists locally and on a national level.

Although SATourism has classified the Free State as being a strong emerging province, the product aspects of Bloemfontein and the province are not as well established in comparison to Johannesburg (the Gauteng experience and the buzz of city life), Cape Town (Western Cape wine lands, cultural experiences and nature that attracts tourists) or Durban (Kwa Zulu Natal with its long stretch of popular beaches, the Zulu and Indian Culture experience and game parks).

These provinces and cities cater for national and international tourists and attract various other major shows in the creative industries; and have much more to offer than the Free State. Besides the cultural experience of Basotho Culture Village in the Eastern Free State, Golden Gate Highlands Park, Clarens, some scenic drives around this route and Parys with its antique shops, coffee shops and commercial galleries in the Northern Free State, Bloemfontein's tourism products have not been well defined yet. This is despite the City's various features such as its history, its built environment, its political significance et al. The city generally remains known as an overnight stop on the way to Cape Town or the Eastern Cape..

Due to the current recession it was found that all the role players in the visual arts industry have been influenced negatively. Owing to the fact that the general population in the Free State continues to think of the visual arts as a luxury, a significant decrease in sales has been experienced over the past several months. Artists have therefore had to resort to other forms of income. At the same time, the increasing costs of art materials has also made it difficult for many artists to continue to produce. Companies that sell raw materials have also indicated a considerable drop in sales figures and in some cases are almost two thirds down since last year. It is however generally believed that once the overall economy picks up again that the visual artists will follow as well.

Linkages with other sectors such as tourism, in developing the market for the visual arts in the province

Clarens in the Eastern Free State is probably the best example of this kind of linkage between tourism and the visual arts. The duplication of this model elsewhere will not be successful

unless a suitable scenic area could be identified with a similar or completely different atmosphere. Parys in the Northern Free State is no 2 on the list. The attraction of the Vaal River and the town's close proximity to Gauteng where most tourists comes from is part of their success recipe. A proposed route is currently in its planning phase for Lindley and has been initiated by members of the community to attract tourists to their town.

The two annual festivals held in Bloemfontein, the Volksblad Arts Festival and Macufe Culture Festival are the only other initiatives that have, to a certain extent, attracted tourists to the city and have created opportunities for visual artists to exhibit and sell their work.

Oliewenhuis Art Museum and Stegmann Gallery do offer workshops and events on a regular basis to stimulate sales and tourism events. Exhibitions by South African artists revolve every month in the two official exhibition spaces.

Significant private or corporate (including academic institutions and parastatals) collections in the province

Oliewenhuis Art Museum, a satellite of the National Museum and Stegmann Art Gallery at the University of the Free State are the only two major collections in Bloemfontein. These collections focus mainly on collecting South African art and they form an important link in the educational and visual art sector of the province.

Private and corporate collections in the province are not accessible to the general public due to the fact that most artists and members of the public are unaware of these collections. The Telkom collection includes works produced by Free State artists and is housed at the Telkom Head Offices next to College Square, Brandwag, Bloemfontein.

The Central University of Technology, Free State have an excellent exhibition space/gallery that is unfortunately currently used as an entertainment/general exhibition area. The reluctance of the institution to appoint a curator and start a collection has been a point of debate amongst staff, students and fellow artists for more than ten years already. Personnel have contributed towards a purchasing policy for artworks which have been overruled by bureaucratic officials. Proper implementation, development and use of this gallery could benefit artists from the region and contribute towards their educational role as a tertiary visual art department as most of their students are from previously disadvantaged areas. Sales exhibitions and developmental workshops could also be arranged to stimulate the visual arts in the province. This would also be an ideal opportunity for government (Sports, Arts and Culture) to partner with the institution towards the benefit of the visual arts.

Education and Training

An assessment of education and training provision in the visual arts in the province

The University of the Free State Fine Art Department and Central University of Technology, Free State – School for Design Technology and Visual Art's Fine Art Department are the only two tertiary art schools in the Free State. FET Motheo College in Bloemfontein, FET Goldfields College in Welkom and Mmabana Cultural Centres in Thaba Nchu and Sasolburg focuses mainly on preparing art students and bridging towards tertiary education. Various smaller art schools exist but focus mainly on arts development through hobby courses.

All the above art institutions are subsidised by government and their viability is monitored on a regular basis.

Fortunately the province is blessed with an abundant amount of talented upcoming artists but unfortunately the position of the province (slow economic growth, lack of tourist attractions and

opportunities) has contributed to this much of this upcoming talent not being able to go very far. A large proportion of learners prefer to study at institutions in other provinces where they believe that they will have better opportunities and exposure than in the Free State. Art students who complete their studies are being lost to other sectors such as education, museums, project facilitation, the police force, the military and security industry because they can provide a secure monthly income. To become an established artist in the Free State depends largely on whether you have additional income or a source of financial security, something which most art students do not have.

Art students completing their courses at FET Colleges and Culture Centres find it problematic due to financial problems to continue their studies at tertiary level and are mostly lost to other industries. A very small percentage continues until the diploma/degree level due to difficulties with art history as a theory subject. An estimated three quarters of art students are therefore lost to the industry due to unsuccessful studies. Most diploma and post diploma/degree level art students find it difficult to establish themselves as independent artists and they are usually encouraged to complete their masters to be prepared for the responsibilities of an established and reputable artist. Most reputable galleries in the major city centres would only take notice of a young upcoming artist if he/she has a higher qualification (Masters Degree).

Apprenticeships in the visual arts in the Free State are not well established and would only occur in a few isolated cases. Most artists and members of the public are unaware of any influence from learnerships or skill programmes through SETA programmes. Most of this is because the SETA's do not market their programmes well enough in the province. A Free State artist that worked with community based projects discovered the activities of SETA in the Eastern Free State by accident when meeting a facilitator from a bead working project. The CSIR was also involved with a few craft and visual art projects in the province but unfortunately with no published results.

Development Initiatives:

The National Department of Arts and Culture, the National Arts Council and NLDTF – Lotto have been very active in the province through collaboration, partnerships and developmental work in the visual arts.

Some of the past and current highlights in the province would be:

Visual Art and Craft development workshops for rural artists and organised by the provincial Department of Sports, Arts and Culture
Volksblad Art Festival funded by Lotto
Macufe Culture Festival funded by local government
Indigenous Ceramic Project (CUT) funded by DAC and Safmarine
Oliewenhuis Art Museum Sculpture Garden funded by Lotto
Litema Project (CUT) funded by Lotto
Oliewenhuis Art Museum Cement and Mosaic Project funded by DAC
Individual artist support by the National Arts Council

Current projects

Heritage Project (CUT) funded by the Heritage Foundation
Various craft projects funded by NAC

The above projects all have had a major and positive impact on the visual arts in the province. These projects created opportunities for artists to develop their skills and market themselves. Stakeholder initiatives are always welcomed but are unfortunately not a continuous support structure.

An assessment of the position, profile and strength of artist associations active in the province

Associations in the province have tried with good intentions to serve and establish a working body, but the province is unfortunately too vast for one association. It is believed that a number of smaller associations with an affiliation to one central association may make better progress in delivering services. Most artists would prefer to have an activity that directly relates to their interests that is showcasing their artwork and not having long meetings and become absorbed in managerial problems and issues. The Association should try to make it simple and look at what and how it would help the masses and not so much the academic sector.

Government:

Many artists feel that government would like to say that they are playing a vital part in the development of the arts and moreover the visual arts, however these artists also feel that government needs to put skilled and knowledgeable officials or managers in place who have a real interest in the industry. The visual arts generally play second fiddle to the performing arts in the province. The budget allocations between what is provided to the performing arts and what is provided to the visual arts is extraordinarily vast, with the amount of funds being spent on hosting one major performance in the Macufe festival able to support the visual arts for an entire year.

Policy recommendations

Government:

Government participation in the visual arts sector should have equal consideration between budget and personnel. The appointment of personnel should be based on experience and expertise in the desired field to prevent the current isolated functioning of the department.

A calendar of visual art events should be established with their proposed outcomes. This calendar should then be distributed to all visual artists, associations, museums, galleries, institutions and schools. A direct link with all stakeholders should be encouraged from government as a major stakeholder that focuses on all visual artists irrespective of age, gender and race.

Government should attempt to implement an awareness campaign to re-instil heritage awareness and Indigenous Knowledge Systems especially amongst the learners at school level and the youth.

Government should continuously work with local municipalities that can offset running costs and create a closer link to the artists in their own environment. Honesty, clarity and transparency with budget allocations are the key factor.

Tertiary institutions:

Tertiary institutions should reach out to all artists and share new developments. They should break free from their isolation syndrome and undertake to engage the community on various levels. Most of the tertiary institutions have this aspect already built into their core vision and mission policies but unfortunately they largely fail to implement this. Fine Art Departments are also under staffed and part time personnel do not have the loyalty that a full time staff member has towards his/her institution. This is an aspect that should be addressed in the immediate future.

These institutions with Communication and Marketing departments should attempt to empower (in partnership with other visual art entities) visual artists with basic marketing and

communication skills in the visual sector. Expertise from these departments would contribute to the overall skills development of urban and rural artists to expose and market their work successfully.

**Information and assistance kindly supplied by Ester le Roux, Sharon Crampton, Prieur du Plessis, Johan Verster, Andrew Maloke, Tinus Boshoff and various local artists who would like to stay anonymous.*

Ester le Roux – Curator Oliewenhuis Art Museum

Sharon Crampton (Oliewenhuis Art Museum Annual Report 2007 – 2008)

Prieur du Plessis – Photographs of Free State wood carvers & Cement and Mosaic Project

Johan Verster – Free State ceramist

Andrew Maloke – Free State Sports, Art & Culture

Tinus Boshoff – Free State printmaker and ceramist

VI. Mpumalanga Report

Prepared by Amos Lesoalo

1. Art Galleries

“Without these establishments there is just no way artists can be competitive. There is just no way.... Artists in this part of the world do not have any ambition to appear in Art South Africa magazine or participate in any Biennale. The fact is they do not even know of those structures” Pitso Chimpiza

A number of artists in Mpumalanga work individually, in their own studios or homes. Only few are affiliated to small art galleries which are mostly privately owned and do not match the standards of their counter parts in Gauteng i.e. Goodman Galleries, Everardread gallery, Momo gallery etc.

“...You do not have a fully fledged response to the conventional term *contemporary art* as it is understood in Durban, Cape Town and Johannesburg. Here artists still approached the word artist in a religious sense of sitting in front of an easel and paint wild life. You do not have Nicholas Hlobos (one of the most internationally traveled artist from the Gauteng Province) here who would challenge much intense issues of life ...” Pitso Chimpiza

The only established galleries which cater for much more “mature” art is the Artists Press (which is more of a studio than an actual gallery) in White River and a gallery in Graskop run by Harry Siertsema.

Although Artists Press offers a lot of national and international exposure to artists in its stable, still artists like Colbert Mashile, Tama Mason, Pitso Chimpiza, Ester Mahlangu, Linda Shongwe etc. still go to Johannesburg and Cape Town to exhibit and sell their work. These is because there are very few established galleries and market for arts than there is in clamorous Provinces like Gauteng, Western Cape and KZN.

The rest are not necessarily main stream art galleries. They are either framing shops which have been transformed to also accommodate the selling of traditional landscape and wild live paintings.

Some are just curio shops that also sell some art that is more appealing to tourists and because they will be the only one around, they will be categorised as art galleries. These types of galleries are mostly privately owned and are at the strategic point/areas where tourists will likely pass through.

2. Association of Arts in Mpumalanga

There are a number of arts associations active in the region, including the Lowveld Arts Association and the Matotoland Arts Association which are both affiliated to the South African Association for the Visual Arts (SANAVA).

The majority of the Arts Association membership are comprised of ‘Fine Artists’, recreational artists and some crafters.

3. Craft Industry in Mpumalanga

There are a number of community arts centre and community based art & craft project and markets across the Province that were developed by DAC couple of years ago. Some of the projects were initially poverty alleviation projects.

In many cases the first funding or the building of the structures came from the national office and

then handed over to local authority for day to day administration of the centres. Community crafters would be offered "stalls" or spaces to make and sell their products. And because the centre will not be sufficiently funded, the state of the structure or programme will deteriorate. If it is a municipal run project it will be managed by an official who know nothing about art or craft never mind the difference between art and craft. The project will be run on part-time bases and local crafters who in most of the time are self taught, producing almost similar products like beads, calabashes, wooden carved animals etc will expected to market their products.

The DAC Craft development initiatives across the Province together with the tourism development initiatives in Mpumalanga has led to the establishment of semi craft centres and community art centre in the Province.

One example is the art centre that has been built in Matsulu region which was built by the DAC – National Office. The centre was initially built to boost the art and craft industry and after it was built, it was then handed over to the local government to administrate.

There were a number of community initiative craft projects that were initially sponsored by DAC and for a while in 2001, the centre seemed to be doing well until the funding ended and then it collapsed. Crafters and artists who used the centre stopped using the centre and now it is just a building that is left unused or with very little happening. I am told that the guy who used to run the centre (Thami Tjali – artist originally from KZN) left the Province and the centre and since he left, the centre collapsed.

The poverty alleviation initiative grants has also led to the mushrooming of the community based art & craft project which manufacture either beads work, pottery, sewing, woodwork etc.

A lot of these projects are not necessarily making any profit rather than just to rely on the funding of their project by DAC. In many cases when the funding ceases, the project stops because it cannot sustain itself. The reason for this is because a lot of these projects produce similar products with a poor quality finish, which makes it difficult for them to sustain their businesses.

Most of the community based craft initiatives need training in product development and market development.

The positive thing about these community based craft initiatives is that they are now getting rural women to work together. The art centres are a very good base to do a proper craft development in communities with a communal space to work from.

4. Print Making

This is a fairly new medium to mostly rural self taught artists in Mpumalanga. Until the relocation of the Artists' Press from Newtown in Johannesburg to White River Mpumalanga, there was no specialised arts infrastructure of this type in the province.

The Artists' Press brings with it a good track record and a national and international network which has proved valuable to the arts industry in Mpumalanga

The project has also brought top South African artists such Colbert Mashile, Tama Mason, Sam Nhlengethwa to the region for periods of time. These are a group of artists who have been working with Mark Attwood for many years and are now visiting the Artists' Press in Mpumalanga to produce editions of prints. Even the clients who used to purchase prints through the Artists' Press while still operating in Jo'burg now are following it to Mpumalanga. Indirectly the Artists' Press contributes to the development of tourism industry as a result of this movement of artists and associated people between Gauteng and Mpumalanga.

The reputation of Artists' Press and its list of affiliates of famous South African artist should draw the interest of local artists to print making.

The fact that The Artists' Press is the only print studio in Mpumalanga means that there is no competition and that it stands a very good chance of growing to be a big art institution in the Province, providing a point of access to local artists wishing to learn printmaking skills at a high level.

Although it has brought with a strong set of affiliated artists, it does now also run the risk of losing a number of its stable to newly formed printing studios like the David Krut print studios in Joburg because a lot of artists who do not like traveling may prefer to switch their affiliation to other local print studios who offer similar services like the Artists' Press.

The fact that they are also entering a new territory/ area with artists who are not exposed or not familiar with the print media may prove to be a challenge to try and convince artists who are used to other mediums to switch to print making.

5. The Position of Artists

The common products that will be produced in Mpumalanga will differ depending on what part of the Province you are in. For an example, one is likely to find more beads work and traditional mural painting in the former Kwa Ndebele (The area where Gogo Ester Mahlangu – the famous BMW painter is coming from). The Lowveld region around Bush Buckridge is characterised by a lot of wood carving because of the availability of wood, with a lot carving inspired by wildlife associated with the Kruger National Park.

There are approximately 70 fine artists living in Mpumalanga, with the majority of them concentrated in the Lowveld area.

There are approximately + - 40 crafters who produce their works individually and most will be in wood carving, ceramic and beads. The majority of wood carvers could be around the Bushbuckridge area, ceramics are in the Matsulu region and those who work in beads will be mostly found in the Former Kwa Ndebele (the area populated with the Ndebele speaking people)

10% of artists rely solely on their creative work as a source of income. 70% of artists are required to do other kinds of work in other sectors in order to support themselves.

Common problems that artists face include:

- Few commercial art galleries to cater for all the artists.
- Lack of funding
- Lack of art education
- Lack of art studios or working space
- Un coordinated arts industry

6. The Market

Low Veld – Bush Buckridge and GrasKop is the area that has a lot of galleries art routes, open air art markets and events and the like that provide market opportunities for the visual arts.

There is however no viable market for the artists in the Province. Most artists in Mpumalanga exhibit

and sell their work in Gauteng i.e. the Goodman Gallery, Momo Gallery, Everard read and Cape Town (Michael Stevenson Gallery). Artists show their work outside their Province through their affiliations with big galleries in bigger cities across the country. Like any other business industry, the art industry relies mostly on the health of the general economy. When people are making a good income that is when they can afford to buy artworks. In the last 12 months art galleries suffered a big knock due to the global recession. The tourism industry (which contributes to the success of the arts and Culture sector) suffered a big loss which then affected the normal performance of the Arts industries.

The main challenges that these businesses face is the fact that in most cases it appears to be catering for the middle class and it excludes the lower class because it is more associated with the rich.

Mpumalanga being one of the provinces in South Africa rich in mineral resources (Witbank), beautiful natural scenery (God's Window) and wild life/animals (Kruger National Park), it is one of the biggest tourist attractions in the country. Art and Craft galleries like the one at the Numbi Gate next to Kruger national park offer a lot of local crafters a good tourist market although most of the products produced or sold are specifically made for tourists i.e. wooden carved animals like the giraffe, lions, elephants etc.

Tourist attraction in South Africa normally visit to a week or more, meaning that they are likely to tour the province more and hey are likely to want to visit the existing art gallery in the province.

6. Education and Training

"Lack of Art Schools. This is the basic result of the above points. Without that you will not be able to achieve anything. I suppose without Wits there is no Johannesburg Art Gallery and ultimately there is just not going to be any William Kentridge" Pitso Chimpiza

There is no professional art training provided in Mpumalanga . Most of the known artists in the Province are either self taught i.e. Ester Mahlangu – a self taught Traditional Mural painter - or trained in Gauteng, Cape Town or KZN – for example, Colbert Mashile, Pitso Chimpiza, Tamar Mason, Judith Mason and Mark Attwood.

Like all the former Bantu Homelands the Department of Education never invested in visual or Fine art education in the province. Although the new school curriculum requires that art should be taught at school, the situation has not changed due to lack of resources, poor planning and lack of art teachers in the province.

The Lowveld Association of the Arts is comprised mostly of artists who live near Bushbuckridge area. The majority of its members are white artists. It is made of +- 70 artists who work in different mediums. The association is affiliated to SANAVA.

Its objective is to promote visual arts, foster the visual/fine arts awareness in local communities, help organise art exhibitions for affiliated artists, undertake art projects and assist artists to develop their skills etc.

The Matotoland Arts Association was formed in 2007 by a group of artists in Ermelo with about 25 active artists in the area. The Association holds occasional exhibitions in a local community and service centre as well as three local restaurants. On the road to Amsterdam there is a farmhouse well-equipped with all the necessities for art courses and artist Isabel Naude has at least 2 art classes a month

The business sector should be encouraged to sponsor the arts and international funds for the arts (particularly community arts centres) should not be curbed. One of the reasons community arts

centres flourished during the previous government was because they had direct access to international funding. Funding community arts stopped or was redirected in the new dispensation and this resulted in closure of many community art centres. Funding should not stop and community art centre managers need to be properly trained on how best to run/manage them.

7. Policy recommendations

Government and public partnership should be encouraged. In many cases Government initiated arts projects tend to fail because of lack of capacity or skills to manage community based arts projects. And because there is no hand over strategy from government to arts community, many government built structures which are for the development of the arts tend to close down because of lack of funding to sustain them and where there is funding, the project will be run remotely by municipal/government officials who have no managerial skills, never mind knowledge of the arts industry itself. Many centres are run on part-time bases by municipal officials with no passion and knowledge for the arts.

VI. Mpumalanga Report

Prepared by Malose Lekganyane

Overview

Limpopo is South Africa's northernmost province, lying within the great curve of the Limpopo River. It is a region of contrasts, from true bushveld country to majestic mountains, primeval indigenous forests, unspoilt wilderness and patchworks of farmland.

The province borders the countries of Botswana to the west, Zimbabwe to the north and Mozambique to the east. In the eastern region lies the northern half of the magnificent Kruger National Park, a nature reserve teeming with African wildlife in a total area roughly the size of Israel. It's the fifth-largest (and fifth-smallest) of the country's nine provinces, taking up 10.3% of South Africa's land area (a total area of 125 755 square kilometers) and with a mid-2006 population of 5.4-million people.

The principal indigenous language is Sesotho (Pedi), spoken by roughly half the population, followed by Tshivenda and Xitsonga.

SWOT Analysis

Strengths

- The province boasts a large number of internationally renowned artists
- The geographic positioning of the province makes it the Gateway to Africa and the flourishing tourism industry offers a great opportunity for visual arts markets.
- Diverse indigenous cultures (Venda, Pedi and Tsonga) allows for rich content and context for production of unique and remarkable visual arts.

Weaknesses

- No government support – most artists feel that the Provincial Department of Sport, Arts and Culture is doing absolutely nothing to help the sector and that this in turn discourages potential sponsors/supporters to offer any help.
- Lack of visual arts infrastructure makes it impossible for this sector to flourish in the province
- There is no formalised learning of visual arts which is supposed to start at least at secondary schooling up to tertiary level.
- Lack of unity among visual art practitioners makes lobbying impossible.

Opportunities

- Polokwane City, the economic and political hub of the province is one of the fastest developing cities in the country and this has the following spin-offs for the visual arts:
 - Infrastructure Development – Galleries, Arts Centres and Market Places
 - Tourism Influx - revenue generation and opening of market links in other countries
 - Festivalisation of the City – festivals are synonymous with developed cities and they offer a great opportunity to market, promote and sell visual arts.
- The National Department of Arts and Culture and government in general have identified cultural industries as crucial part in growing the national economy.

Threats

- Brain Drain – losing remarkable artists to other provinces and countries.

- Established and aspiring artists opting for other industries/sectors.
- Inability to build cultural industries that can support local economic growth.
- Artists isolating government departments and rendering them irrelevant.

The Position of Artists

It is in Limpopo Province where a large number of South Africa's visual artists are found. These artists are spread across the province's five regions: Capricorn, Vhembe, Sekhukhune, Mopani and Waterburg with high concentration of these artists found in the Vhembe District which is predominately inhabited by Venda speaking people.

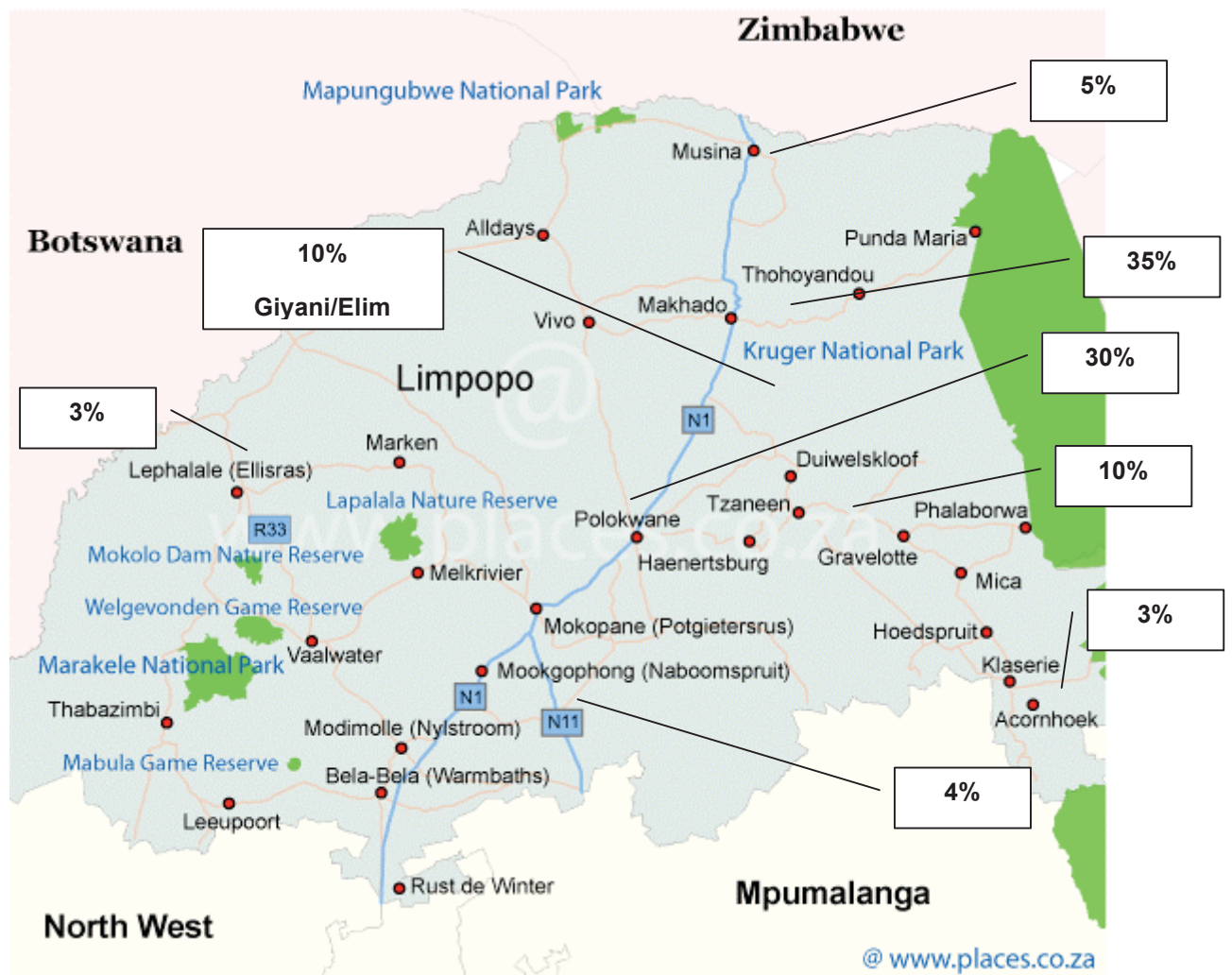


Figure1. Spread of Visual Artists across Limpopo Province

Some researchers and academics argue that this concentration in Vhembe District is due to rich cultural heritage still held in high value by the people of the region as well as the magnificent landscape filled with heritage and tourism sites - a landscape that has given rise to a large number of woodcarvers who make Vhembe one of the largest manufacturer of wooden sculptures - are large in dimensions and artistic expression.

The estimated number of visual artists in the province is probably in the range of 300 – 500 with about 100 exhibited/published visual artists. A large number of these artists are crafters many of whose works may never be exhibited in established galleries but are nonetheless making a living out of this trade. Most of these artists are in their late 20s and 40s with very few being in the senior citizens category.

The other four regions of the province stand in great contrast to Vhembe. They produce largely performing artists – predominately cultural performers. An exception is the Capricorn District which is a cosmopolitan area populated by people from all the other four regions. It is also the home to Polokwane City, the economic and political hub of the province and Capricorn District is, in this regard, accommodative of all kinds of art forms as it has better infrastructure and economic opportunities for artists.

The Polokwane Art Museum

The Polokwane Art Museum had its humble beginnings in a Town Council decision, inspired by the late Mr. Jack Botes back in 1972, to start an art collection. The municipal art collection (now over 1050 works) eventually grew into what is the Polokwane Art Museum today.

This museum is by far the only professional set up in Limpopo for visual artists to exhibit their works. It is solely funded by Polokwane Municipality for the following core functions:

- Collect exceptional artworks
- Exhibit municipal collection, works by local artists and special exhibitions such as the Standard Bank Exhibition¹ and MTN Meanings and Messages Exhibitions.
- Educate artists through workshops
- Research and Documentation
- Conserve art works

The museum benefits the community as whole but more so the over 50 artists who are often commissioned to produce works and to facilitate workshops. The total number of visitors to the museum is estimated at a staggering 30 000 per year.

The single biggest challenge for the museum is the insufficient and inconsistent funding from council which makes it impossible to coherent programs.

The following are some notable and internationally renowned visual artist from Limpopo Province:

Avhashoni Mainganye

He was born 1957, in Phiphidi, in Venda. He now lives with his family in Thohoyandou.

In 1981, Avhashoni enrolled at the Rorkes Drift Art School in Kwa-Zulu Natal. In 1983 he returned to Venda and had a two person exhibition at the converted ladies bar at the Thohoyandou Hotel with Nthambeleni. Back at home he became a local cultural activist to revive the energy of the artists in Venda.

In 1985 he went to Johannesburg and enrolled at Funda Art Centre in Soweto, which was initiated by Matsemela Manaka and its first director Steven Sack. He took part in the Ussalep/Thuphelo Workshops which were an interaction between local and international artists.

Avhashoni uses different mediums such as oil painting, sculpture, etching, collage and photography.

¹ The Standard Bank Art Exhibition is a dynamic annual project that is artist-driven and has been managed to showcase spectacular exhibitions by the likes of Johannes Phokela, Wayne Barker, Irma Stern, Bram Kruger etc.

His aim is to create art awareness, initiate arts education in Venda, unveil other artists and open a museum and manage his own art studio.

Noria Mabasa

Noria Mabasa was born May 10, 1938 in Xigalo in the Limpopo Province in South Africa. She received formal education for only one year, having to walk three hours a day to the nearest school. She carried out household chores throughout her childhood.

Noria produces wooden and clay sculptures which she started making from as early as 1970 and her home now boasts a large gallery that was built through assistance by the national Department of Arts and Culture. The gallery is now a home to Ms. Mabasa's precious works.

Samson Mudzunga

Samson Mudzunga was born in 1938 in Shanzha, Dopeni, in Venda (Limpopo Province), where he continues to live and work. His family is from the area around Lake Fundudzi which in Venda mythology is regarded as a sacred site. A self-taught sculptor and carver, his first figurative sculptures were included on an exhibition at the Fuba Gallery in 1988. He started carving the huge drums for which he has become well-known in the mid-1990s. In the forms and imagery of these drums Mudzunga incorporates symbolism from the mythology and traditional customs of the Venda people to both explore these customs and question issues of power, in particular the power relationships existing within his own community.

Mudzunga has been widely acclaimed in recent years. The Johannesburg Art Gallery held a solo exhibition of his work in 2003, and his drums were included in the South African group exhibitions *New identities* in Bochum, Germany (2004); *Personal Affects: Power and poetics* in contemporary South African art at the Museum for African Art and the Cathedral of St John the Divine, New York (2004), and *The Contemporary Museum* in Honolulu, Hawaii (2006); and *Turbulence* at Hangar-7 in Salzburg, Austria (2007).

Mudzunga held a solo exhibition at the Jack Shainman Gallery in New York in February 2006. A performance marking the departure of the new drums for New York was held at Mudzunga's home in Dopeni, Limpopo, in November 2005

Challenges facing the visual arts in Limpopo Province

The challenges that face the visual arts sector in Limpopo arise from more than one factor and are best summarised by the following subjects:

- The Market
- Government Involvement
- Development Initiatives and
- Education and Training

The Market

Limpopo Province is known as the gateway to Africa with a healthy tourism market triggered largely by the famous Kruger National Park. The biggest challenge with this tourism market is its one-sidedness, leaning towards eco tourism which makes the hospitality industries and the actual parks the only beneficiaries of the tourism spend in the province.

Lack of conventional art galleries (evident in the database) makes it impossible for professional artists to exhibit and sell their works at sustainable rate. This has led to established artists of the province migrating to other regions such as Cape Town and Johannesburg as well as overseas.

Public spaces in the cities and at tourism sites are dominated by curios that can hardly be classed as works of art. This exposes the ordinary tourist to works of inferior quality that are then mistaken to be reflecting the province's artistic offering.

It is again due to lack of these infrastructural resources that the local audiences are not readily acquainted with works of art and therefore can only get fascinated by such works when they do come across them but have not yet developed an instinct or desire to purchase and own them.

Exhibitions such as The Standard Bank and The MTN which bring works of artists from all over the country have helped in terms of market linkages wherein local artists are able to create valuable networks with established artists and collectors from outside the province. The greatest limitation with this exhibitions is that they only happen once a year and are dominated by artists from outside the province.

Government Involvement

The greatest challenge in creating sustainable visual arts industry in Limpopo Province is most arguably government which contributes almost nothing towards the development of the arts industry in the province.

DEPARTMENT OF SPORT, ARTS AND CULTURE

Provincial Arts and Culture Council

Head Office – Polokwane

- **Visual Arts and Crafts Development Unit**

District Offices

- **Capricorn**
- **Vhembe**
- **Sekhukhune**
- **Mopani**
- **Waterburg**

Local Municipalities

The Provincial Department of Sports, Arts and Culture has only two dedicated officials responsible for Visual Arts and Crafts. They are assisted by District Cultural Officers who are also responsible for other arts disciplines and sport and recreational matters. Arts and Culture at local municipalities are not prioritised as they are seen as unfunded mandate and it is for this reason that only very few local municipalities have a dedicated office for this sector.

The department's core business, in terms of the visual arts, is to collect artist's database and to take along some few artists to some few craft fairs in a manner of fulfilling ceremonial mandate. This has led to a situation where artists view government as stumbling block and most of them have opted to work independent of government.

Parastatals

Linked to government are parastatals such Trade and Investment Limpopo (TIL) as well as Limpopo Business Support Agency (LIBSA) who see their roles as working with handpicked visual artists to expose them to export markets and to incubate them, respectively.

Trade & Investment Limpopo (TIL) is the official agency for the Limpopo Provincial Government to market the potential and investment opportunities of South Africa's most Northern Province to local, national and international business communities.

Incubation Programme

One of LIBSA's core programmes is 15-month business incubation. Business incubation is the support provided in the development phase of start-ups when entrepreneurs work on the launch of their companies. Business Incubators are institutions that support the entrepreneurial process, helping to increase survival rates for innovative start-up companies (NOTE: only entrepreneurs with viable businesses are admitted to the incubation programme).

These start-ups receive a specialized menu of support resources and services, which include the provision of physical space, counselling, assisting in compiling an effective business plan, compiling business profiles, administrative services, advice on compliance with statutory requirements, technical support, business networking and advice on sources of finance.

Development Initiatives

Limpopo Province, like other parts of South Africa, is on a rapid infrastructure development. What is disturbing, nonetheless, is the fact that none of this development is taking into consideration the art industry in a province where there is not a single public or private theatre.

The few Community Art Centres which were developed by the Transitional Local Councils and Public Works are struggling to define their purposes and to access proper funding. They end up being used by Churches and other Civic Organisations.

Education and Training

Many artists in Limpopo are without formal or any education and depend on so-called "God-given-talent" for their artistry. This leads to artists running out of ideas and not being able to improve their technique.

University of Venda and University of Limpopo have no formal art studies although they have attempted to create some space to exhibit the few artworks they have acquired.

MAPPP-SETA has only one service provider in Limpopo, Basotho Consulting who offer Craft Enterprise Learnerships.

Policy Recommendation

Constitution of the Republic of South Africa

Schedules 4 and 5 of the Constitution of the Republic of South Africa, 1996 are open to misunderstanding, insofar in they refer to "cultural matters", and "provincial cultural matters" in local government matters and Schedule 4b and 5b do not make express reference to arts and culture. They refer to culture as a concurrent competency of National and Provincial Government. This essentially distracts local authorities, which are at the centre of service delivery, from budgeting for and implementing cultural matters.

It is recommended that these paragraphs of the constitution or their interpretations thereof be reviewed and possibly amended.

Unbundling of Departments/Units

Government units responsible for arts and culture at provincial levels are erroneously bundled with unrelated sectors such as Education or Sport and this result in these other sectors taking precedence over arts and culture service delivery.

It is recommended that provinces take a lead from the national government which unbundled the Department of Arts, Culture, Sport and Technology to the Department Arts and Culture.

The author would like to acknowledge the following people for their valuable contribution:

Mrs. Arlette Franks

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Mr. Lerole Dikgale and Mathomo Mogano

Artists and Directors, Canafri Pottery

Mr. Joel Legodi

Limpopo Provincial Department of Sport, Arts and Culture

Mr. Amos Letsoalo

Curator, Polokwane Art Museum

The following sources are also cited in this report:

1. David Krut Publishing
2. www.golimpopo.com
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4. www.til.co.za/
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Appendix E: Snapshot Case Studies

The following case studies reflect different dimensions of the contribution of the visual arts to society and the economy in different contexts, from urban centres through to deep rural areas. They are in no way exhaustive (many other projects and organisations are doing similar work), but are intended to provide some insight into the power of visual arts to impact on people's lives outside of the traditional institutional contexts of the visual arts. They also bear modest testimony to the imaginative reinvention of visual arts practice in the South African context.

The case studies were compiled by Michael Barry, Carol Brown, Naren Sewpaul, Joseph Gaylard, Giselle Baillie and Malose Lekganyane.

CASE STUDY 1: PROVIDING MARKET ACCESS

The African Art Centre (KZN)

CASE STUDY 2: PUBLIC ART AS AUDIENCE DEVELOPMENT

RED EYE (KZN)

CASE STUDY 3: A RURALLY BASED CENTRE FOR SKILLS, INNOVATION AND EXCHANGE

The Caversham Centre for Artists and Writers (CCAW) (KZN)

CASE STUDY 4: ART AS A TOOL FOR ADVOCACY

Art For Humanity (KZN)

CASE STUDY 5: PUBLIC ART IN URBAN REGENERATION

Public Art Projects in the Inner City of Johannesburg (Gauteng)

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CASE STUDY 1: PROVIDING MARKET ACCESS

KZN

The African Art Centre

Concept

The African Arts Centre was established in Durban in 1959 by the South African Institute of Race Relations. In 1982, the Centre re-established itself as an autonomous non-profit organisation under section 21 of the Companies Act. The Centre is intended to provide an outlet for black artists and craftspeople to promote and sell their work; in addition, it provides workshops and other training programmes to enable black artists and craftspeople to develop their skills. It also seeks to identify and support contemporary trends in art and craft-making, while building a collection to preserve South African cultural heritage.

Management

The African Arts Centre is a non-profit organisation. It is constituted by a paid membership, which in turn elects a Board of Directors and various sub-committees. This Board is then responsible for the appointment of permanent and professional staff to maintain the Centre's activities. At present the African Arts Centre has 18 directors and three honorary patrons; it employs five permanent staff members. An executive management committee of eight of the directors and all five staff members meets once a month and hold responsibility for the day-to-day running of the centre and its operations. Other directors are called to serve upon a number of sub-committees, responsible for planning exhibitions, maintaining the Centre's archival collection and ongoing documentation, as well as development work.

In addition, the AAC maintains a 'Friends of the African Art Centre' organisation, aimed primarily at maintaining communication between the AAC and its supporters.

Projects

The African Arts Centre shop is the principal public face of the organisation. It relocated from the CBD to a dedicated space on Florida Road in November 2006. This shop purchases art and craft from local producers, and then retails them to a local and international public.

In addition, the AAC organises art classes and workshops to enhance and develop the already-existing skills of craftspeople. In recent years it has held art classes dedicated to bead making, to the design and production of Christmas ornaments using craft techniques, and to embroidery techniques. It has enabled craftspeople to participate in large-scale commissioned art projects for the Constitutional Court and other public collections.

The AAC also organises and hosts exhibitions of both craft and visual art, including jewellery, beadwork, drawings, basketry, ceramics and paintings. These have included group exhibitions and solo exhibitions by local artists and craftspeople.

The AAC has donated its collection of historic artefacts, fine arts, and crafts to the Campbell Collections at the University of KwaZulu-Natal, where they remain accessible to the public. The AAC also organises and sponsors lectures and workshops aimed at a general public.

Beneficiaries

The principal beneficiaries of the activities of the African Art Centre are the artists and craftspeople supported financially and creatively by the AAC. They are paid for their works; they are provided with a marketplace in which to sell their works. They are also exposed to new ideas and new methods of work, through workshops and art classes.

Members of the public more broadly are also exposed to the contemporary and historical arts and craft production of KwaZulu-Natal. The AAC shop acts as a central site for the distribution and ethical sale of high-quality craft and art.

The African Art Centre is a non-profit organisation, employing five staff members.

Current status

The African Art Centre relocated its premises at the end of 2006, and is currently based in a dedicated site on Durban's Florida Road. In part as a consequence of this move, the AAC faced a loss of R196,542.00 in the 2007 financial year; for the following year – 2008 – this loss was significantly reduced to R21,120.00. This was a result of a 32,4% increase in the volume of sales registered by the AAC shop, totalling – for the 2008 financial year – approximately R3,2 million. These suggest that the AAC began the 2009 financial year in a strong position.

Early in 2009, Anthea Martin resigned as Director of the African Art Centre to pursue other opportunities. The position was filled from November 1 by Sharon Crampton, former director of the Oliewenhuis Museum in Bloemfontein.

Challenges

The economic downturn may have a negative impact upon the AAC's generally improving financial position. A \$400,000.00 grant from the W.G. Kellogg Foundation – aimed at supporting and strengthening the AAC's ongoing work – will nonetheless enable the African Arts Centre to continue to expand its provision of support to artists and craftspeople in the region. They were awarded a contract to produce a large beaded flag for the Moses Mabhida Stadium in Durban during 2009 and also supplied some other craft and art for this project.

CASE STUDY 2: PUBLIC ART AS AUDIENCE DEVELOPMENT KZN

RED EYE

Concept and Beginning

Red Eye was conceptualised in 1998 by the Durban Art Gallery as an initiative to involve the 16-39 year old age group in museum visiting. The first step, initiated by the Durban Art Gallery, was to call together a group of people in the target age group who were currently involved in the arts. This included people in various creative fields such as contemporary dance, journalism and music and, a decision was taken to launch as a multi-media event geared towards young people. It was decided that the launch should be free. As financial issues were important and a vehicle for funding was necessary it was therefore decided to run the project in conjunction with the Friends of the Durban Art Gallery society who were approached for an initial small loan to pay for the cost of the launch. The Committee agreed and, in addition, if the event succeeded, to open a separate account under the Friends' auspices.

After much debate, the initiative was named Red Eye @rt (The @rt was later dropped and it became known as Red Eye). The launch was held in May 1998. The launch was publicised widely through editorial coverage in the media, while committee members took on the task of handing out advertising fliers at nightclubs, colleges and other places frequented by the target audience. The use of these fliers also emphasised a new direction in marketing and served as an important way of dispelling the prevailing 'elitist' image of the institution.

Mission, Vision and Objectives

The initial promotional pamphlet for Red Eye gave the following overview of its function:

Mission

To promote a culture of art appreciation on a long term basis among the younger generation of South Africans. We acknowledge that an appreciation of a nation's artistic heritage can promote a culture of co-operation, peace and creativity.

Vision

The Vision of Red Eye is to bring young people in the 16-39 age group into the DAG where they are exposed to a variety of art forms.

Objectives

- Audience development by exposing young people to the Durban Art Gallery's permanent and temporary exhibitions.
- To inculcate a life long interest in the arts.
- To develop the skills of curating, exhibiting and organisation among the younger generation.
- To provide a platform for younger artists in a professional venue.
- To raise funds to purchase art works for the City of Durban by younger artists thereby promoting the works of these artists and encouraging artistic production.

Initial Phase

The launch exceeded all expectations with 2000 people attending.. The Press were overwhelmed and it received enormous coverage. So the scene was set for its continuance on a monthly basis. The initiative took the form of a two-hour-long multi-media event, taking place between six and

eight p.m. and charging an entrance fee with a reduction for students and members. The existing art exhibitions and permanent collection were left *in situ*; performances took place around and within the spaces created by the displays. The organising committee had a loose membership and, after a few months, a public meeting was called and a committee was formally voted in for the period of a year. The Red Eye committee would be re-elected on an annual basis. An Annual General Meeting was held, and both a balance sheet and annual report were presented. This process linked the AGM of Red Eye with the AGM of the Friends of the DAG. The committee viewed all proposals and made a selection for the forthcoming event. From the beginning, there was an attempt to encourage previously marginalised groups to participate. There was also a determination to include cultural forms which had previously been excluded from the gallery space but which were common in Durban, such as Indian and Zulu dance, rap poetry, ballet, jazz and rock music. The event gave these performers a platform to showcase their talents to the target audience. Another product of the initiative, although less obvious, was the acquisition of organisational experience gained by the young committee (many of whom were students). Skills such as event management, marketing, curating exhibitions and keeping financial accounts were attained. The organisational work carried out by the committee was assisted by staff members of the DAG. Performers were initially not paid but rather provided with a subsistence fee to cover costs of transport and food, where necessary.

Red Eye's initial success, and the public's positive response, remained evident until the second half of 2001, when attendance figures began to drop and the programme became repetitive. This was partly due to the absence of a large pool of artists in Durban; it was also due to the dwindling energy of the organisers who were finding a monthly event too much to handle. After taking a month's break, Red Eye tried to reinvent itself and rejuvenate the event by taking it out of the gallery space in December 2001. The committee chose a downtown Shopping Centre. The choice of a downtown venue was deliberate, and in keeping with the original aim of involving audiences who would not normally frequent the gallery. However, the venture was not successful and drew a very small audience. The area was considered too dangerous by most of the regular attendees and the marketing did not attract a new audience. The failure of this event, coming after a bad run of attendance over the past few months, led to a lengthy debate as to whether the event had served its purpose and whether it should be discontinued. However it was decided to make another attempt, but on a quarterly basis

Second Phase – Moving out the gallery and linkages with Urban Regeneration

Another watershed occurred when, on its fifth anniversary in June 2003, the event integrated the gallery space with five venues in the surrounding streets. The first two hours were spent in the gallery and the event then moved across the road into a side street. The event then moved into a road underpass and, similarly, graffiti art and murals were painted while musicians busked in the area. The evening ended at a dockside community art centre. The results of this were a positive interaction with the city and its inhabitants, a reclaiming of spaces previously considered undesirable, and an integration of art and art-making into the city. The attention created by this particular event led to the provision of very generous funding from the City Council for future events. These events were associated with the urban renewal project, *iTrump*, which had commenced about the same time as Red Eye.

This project, which was a Regeneration and Urban Management Programme. Red Eye was identified by *iTrump* as being of importance to urban regeneration and, in particular, to attracting people into the spaces which had, since the 1970s, gradually become perceived as unsafe and had therefore lost their civic function. The event in May 2003 was the first to establish a strong and viable relationship between the gallery and the outside spaces. Subsequent Red Eye events therefore began to receive substantial funding from the City Council in order to promote the regeneration of the city-centre. City officials including the Mayor and Councillors, came to the party and streets were closed, disaster

management teams were set up, local businesses joined in and benefited from the large number of people visiting the city which had been a no-go area at night.

Beneficiaries

The financial benefits to artists are not quantifiable however this was never the aim. It is apparent, from observation and anecdotal evidence, that the experience and exposure gained from participating in the event was instrumental in launching many careers of young artists and event managers, musicians, caterers etc. The prestige of showing their skills to a wide audience in a respected establishment was beneficial. Links with local businesses such as the nearby Royal Hotel and recently the King Club, who hosted an after-party, have been instrumental in increasing visibility and business for these venues.

Conclusion

It is perhaps an irony of the project that as it became better funded, administration became top heavy, it could no longer be handled by inexperienced volunteers, it put too much pressure on existing structures and so it lost a certain edge and enthusiasm which had been the mark of its success. The project had been running uninterruptedly and successfully from 1998-2006. After September 2006 Red Eye ceased mainly due to the resignation of the Director, Carol Brown, who had spearheaded the process. Lack of institutional capacity and enthusiasm led to its demise which was however only temporary as it was revived in September 2009 and was highly successful with an attendance of about 1000 people and a positive feedback.

Sources from the archives of the Durban Art Gallery.

CASE STUDY 3: A RURALLY BASED CENTRE FOR SKILLS, INNOVATION AND EXCHANGE KZN

The Caversham Centre for Artists and Writers (CCAW)

Mission

CCAW seeks to cultivate significance in the individual and their community through creativity and the Arts using residency and community collaboration programmes which foster leadership, innovation and a spirit of excellence

History

The Caversham Press in the KZN Midlands, was established by Malcolm Christian in 1985 as the first independent printmaking studio of its kind in the country. From initially working only with invited artists, the Press expanded in 1989 to running workshop programmes inviting artists from township communities to participate. A turning point was their first public exhibition for the 1990 National Arts Festival in Grahamstown. This led to a co-operative publishing venture allowing broader access to artists.

The Caversham Press Educational Trust, was established as a not-for-profit organization in 1993. This formalized Caversham's print-based educational programme that had been in operation since 1988. This Trust has aims in keeping with the founding ethos of Caversham i.e. to offer accessibility and skills transference and to nurture emergent artists from disadvantaged backgrounds. It now provides the formal structure through which the innovative accredited Caversham eYe (Early Years Education) teacher training programme is offered.

Since its inception, the Press has worked with more than 250 artists including the well known artists William Kentridge, David Koloane, Zwelethu Mthethwa, Deborah Bell, Mmakgabo Sebidi, Robert Hodgins and Bonnie Ntshalintshali. Other artists who have worked with the Press include Wonderboy Nxumalo, Ezekiel Mabote, Vulindlela Nyoni and Sarah Tabane.

Development of structures and functions

The organisation took a leap forward in 1998 when a member of the Caversham Print Collectors Club (1992-6), John Samuel, was appointed head of the W.K. Kellogg Foundation in Africa. He assisted Caversham in exploring an international residency programme in conjunction with the Fulton County Arts Council in the USA.

The initial residency programmes had hosted artists in the home of Malcolm and Ros Christian however as the programme expanded separate accommodation for artists was built. After the establishment of The Caversham Centre for Writers and Artists in 2002, adjoining land was purchased and a second cottage was built.

Caversham has developed four models for residency programmes:

International Cultural Dialogue Residency – allowing local and international artists and writers the opportunity to share their ideas and skills

Specialist Residency – a programme focussed on mentorship and learning where experienced artists share can share skills with the younger generation

Creative inspiration – establishing a laboratory that allows various levels of leadership to explore the relationship between creativity and the challenges of leadership.

CreACTIVE leadership and Vision-sharing residency – These centres are community based and partner with existing structures such as educational institutions, churches and art organisations. They are established by CreACTIVE catalysts who have participated in the Caversham leadership programme. The first centre beyond Caversham has been established at Jabula Combined School in the local community of Lidgetton. Since then eight more have been established throughout KZN.

Funders

The major funders are W.K. Kellogg Foundation, Fulton County Arts Council, USA and National Arts Council. Various other funding organisations have contributed to their activity over the years

Governance and Management

CCAW is managed by an Executive Committee of 5 people who report to a Board comprising members of South African and International standing

CASE STUDY 4: ART AS A TOOL FOR ADVOCACY

KZN

Art For Humanity

Concept

Art for Humanity (AFH) is a non-profit, non-governmental organisation based in Durban, South Africa. It seeks to advocate for and raise awareness of human rights issues through the production of fine art print portfolios, collaborations with other artists, exhibitions, publications, and public research projects in South Africa and internationally.

History

AFH was originally founded in 1988 under the name 'Artists for Human Rights,' with the intention of highlighting human rights abuses during the apartheid period. AFH then sought to mark the 50th Anniversary of the Universal Declaration of Human Rights in 1998 with a portfolio of prints, commissioned from and donated by artists from South Africa and the developing world. In 2000 the organisation created a similar portfolio to raise awareness of issues relating to the prevalence of HIV/AIDS in South Africa. The success of these portfolios inspired the organisation to expand and formalise its activities; it is currently involved in producing further portfolios, publications, and exhibitions to further its aims.

Management

Art for Humanity is governed by a ten-member board, eight of whom are based in Durban and meet regularly. In addition, AFH is directly managed by a director, Jan Jordaan – who is also a member of the governing board. AFH is housed at the Durban University of Technology, at which Jordaan is a lecturer. It employs a manager and a secretary. In addition, a number of interns in journalism and the fine arts supplement AFH's staffing.

Projects

The Universal Declaration of Human Rights Print Portfolio established the model for AFH's principal projects. It has been succeeded by similar print portfolios including the "Women for Children" print portfolio, in which 25 female artists and 25 female poets produced a portfolio intended to 'inspire moral ownership of the rights of children from Southern Africa.' These images and texts were reproduced on posters to be distributed to clinics, non-profit organisations, and other bodies; a book and catalogue were also produced. In addition, outreach exhibitions of the portfolio were organised and launched in schools and libraries in non-metropolitan areas. This was intended to broaden the portfolio's audience.

At present, AFH is engaged in developing a new project under the title of "Dialogue among Civilizations." A portfolio is being produced to coincide with a conference, to be held in 2010, dedicated to stimulating discussions on 'art, society and justice, focussing on human rights, peace, freedom of expression, social development and impact of arts on society.' In addition, the conference proceedings will ultimately be published; students will produce a photographic exhibition; a schools banner project is being organised; the conference is intended to provide an international showcase for the work being produced by AFH.

The various portfolio projects – including the earlier Human Rights portfolio and 'Break the Silence' HIV/AIDS awareness portfolio – are ongoing, and continue to be distributed through publications, posters, and public banners. AFH also conducts workshops on the use of art in the creation of public awareness of human rights and health issues.

Beneficiaries/Partners

In 2008, Art For Humanity noted approximately 60 partnerships with institutions ranging from South African art galleries and museums (for example, the Durban Art Gallery, Iziko South African National Art Gallery, Oliewenhuis Museum and others) to strategic partners, representing civil society (such as the Advice Desk for the Abused in Durban, the Women's World Summit Foundation in Geneva, the Treatment Action Campaign, and the Prince Mshiyeni Hospital in Umlazi).

AFH is not directly aimed at specific beneficiaries, but rather at raising awareness of human rights issues; as such its successes are difficult to quantify.

Current Status

Art for Humanity is currently organising a "Dialogue among Civilizations" conference to be held in 2010 in partnership with the Durban University of Technology. It has received support from UNESCO and the Commonwealth Foundation, amongst others, to hold this conference. It will be accompanied by the creation of a print portfolio and other art projects which are all currently being produced.

Its print portfolios continue to be displayed in venues locally and abroad, and to raise donations for the organisation.

CASE STUDY 5: PUBLIC ART IN URBAN REGENERATION

Johannesburg, Gauteng

During the course of the last ten years Johannesburg has experienced an explosion of new public art, much of it linked to urban regeneration plans, and primarily concentrated in the inner city.

Johannesburg is almost certainly the African city that has seen the greatest investment in this area on the part of government, the private sector and arts organisations. These projects have been driven by a belief in the future of the city and the importance of creativity in shaping and defining this future on the part of businesspeople, champions in government and within the arts community itself.

Key facts about public art in the inner city:

- o During the last 10 years over 200 public artworks have been realised in the inner city
- o The total estimated investment from public and private sector sources has been in the region of R14 million
- o The commissioning of these artworks has created work and income for over 250 artists

City governments have put taxpayers money into public art based on the recognition that artworks can play a role in creating and shaping public space, attracting investment and development to areas in decline. In Johannesburg, this investment has been strongly linked to urban development and regeneration plans aimed at 'turning around' areas like Newtown, Braamfontein, Hillbrow, Berea, Bertrams, Doornfontein and Yeoville. All of these areas witnessed the flight of business to the north during the course of the 1970s and 1980s, and a sharp decline in the quality of the public environment in the 1980s and 1990s, with a large influx of people from peri-urban and rural South Africa, and from other African countries. Public art has been consciously deployed as a strategy for creating meaningful and safe public spaces as part of the overall regeneration of the complex and challenging environment of Inner City Johannesburg. The return on this investment has taken the form of business moving back to the inner city and increased levels of private investment in inner city properties.

A number of key projects played an important role in triggering the explosion of public art that Johannesburg has witnessed during the first decade of the new millennium.

The interlinked **JHB Art City** and **Cell C Art in the City** projects - jointly launched in August 2002 - transformed Johannesburg into the "largest outdoor gallery in the world" through a series of artworks designed for large format wraps on buildings across the inner city. The projects were also partly developed in anticipation of two major international events that the City hosted at this time - the World Summit on Sustainable Development and the Cricket World Cup. The JHB Art City project was driven by the Central Johannesburg Partnership and Inner City Business Coalition with support from the City of Johannesburg, Business Arts South Africa, the National Arts Council and the Johannesburg Development Agency. The Cell C project was developed in parallel by a media agency for the (then) recently launched mobile telephony provider. Both projects involved artists responding to the histories and contemporary realities of the inner city in a variety of ways, with the Cell C component of the project requiring artists to incorporate a 'C' somewhere into their artworks.

The projects generated significant energy and excitement around the role that public art might play in transforming perceptions of the inner city of Johannesburg. The two initiatives also stood as an exemplar of how public and private sector interests and organisations could come together around a common purpose. A number of these artworks can still be seen in different locations across the inner city. The recent Bus Rapid Transport System artworks programme (2009) is another example of this kind of 'serialised' artworks programme.



Clockwise from left: *Joburg Man* – Arlene Amaler Raviv & Dale Yudelman (JHBArtCity); *Signs of a Transforming City* – Stephen Hobbs and *Baseball* - Richard Rhode (JHBArtCity); Titus Moteyane (Cell C Art for the City)

Integrated Artworks Programmes

On a more 'ground' level, the first significant large-scale project to be embarked on was the creation of the '**Newtown Heads**' in 2001 – a series of 560 bollards with carved wooden heads reflecting the peoples of Africa, distributed around Newtown and immediately surrounding areas. Linked to the overall development of Newtown as a cultural precinct, this project was soon followed by the more complex **Faraday Place** development completed in November 2003. Initiated and financed by the Johannesburg Development Agency, the project formed part of the upgrading of the Faraday taxi rank and medicine market on the Southern edge of the CBD, and was the first project to involve artists in the research, conceptualisation, management and detailed planning of the project.

One of the longest surviving incursions of black South African culture and business into a city designed around the interests of white South Africans, the location has occupied an important place in the psyche of the inner city. The artworks programme was facilitated through a partnership (called "+++") between the arts consultancy Trinity Session and the Joubert Park Project artist collective.

The project involved extensive consultation with traditional healers at the site, as well as much historical research, and twenty artists produced a series of mosaics, murals and urban furniture that drew on and celebrated this local knowledge. This project anticipated subsequent approaches to public art as a component in precinct and area development – the major examples being the Metro

Mall development, the Newtown precinct development, Transport Square and the recent public artworks programmes across Ellis Park, Doornfontein, Hillbrow, Berea and Yeoville.



Faraday Place artworks programme, clockwise from left: Dorothee Kreutzfeldt & Sipiwe Ngwenya; Flora More; Viaan Strydom and Thabo Rampai; Retha Erasmus

The Sunday Times Centenary Project

The Sunday Times Centenary Heritage project played an important role in generating ideas and excitement around the potentials of public art, both in Johannesburg and nationally. The project marked the 100th anniversary of the Sunday Times newspaper, and involved commissioning artworks memorialising major figures or events that shaped the news during the course of the newspaper's history. The project was commissioned by the Sunday Times in partnership with the South African History Archive (SAHA), with Art At Work acted as commissioning agent and project manager.

Informed by a "No More Big Men on Horses" philosophy, the intentions of the project were expressed thus:

"We wanted to show how quickly news becomes history. We wanted to think in fresh, imaginative ways about our past, shared and separate, painful and proud. We wanted to add a stitch to the fabric of our streets and communities."

The project involved the commissioning of over 35 artworks across the country from both established and lesser known contemporary artists, with Johannesburg enjoying the largest concentration of artworks.

Artworks specifically developed for the inner city include:

- o Kagiso Pat Mautloa's *Simakade: Memorial to Deaths In Detention*
- o Louis Levin's *Memorial to Duma Nokwe*
- o Usha Seejarim's *Gandhi Memorial*
- o Angus Taylor's *Brenda Fassie Memorial*



Gandhi Memorial (2006) – Usha Seejarim



Memorial to Duma Nokwe (2006) – Louis Levin

Gateways

The other important 'moment' in the evolution of public art in the inner city has been around the development of large-scale public artworks in key 'gateway' locations across the Inner City, designed by major figures in contemporary South African art. The first project of this kind was installed in 2007– the majestic **Eland** sculpture designed by Clive van den Berg – located at the point at which Jan Smuts Avenue enters the inner city suburb of Braamfontein from the north-west 'entrance' to Braamfontein in 2007. A variety of major projects followed, including:

- o **Firewalker** on the Queen Elizabeth Bridge, produced through a collaboration between the internationally acclaimed artist William Kentridge and one of the country's top young sculptors/multidisciplinary artists, Gerard Marx
- o **The Angel of the North** at the Constitution Hill entry into Hillbrow on Kotze street
- o **Invented Mythologies** in the Ellis Park precinct, designed and fabricated by Durban-based artist/architect/activist Doung Anwar Jahangeer

- o **Paper Pigeon**, marking the western gateway into the inner at the beginning of Market Street, designed by Maja and Gerhard Marx
- o **Optic Field**, marking the second major northern gateway into the inner city on Houghton Drive



Invented Mythologies (2009) – Doung Anwar Jahangeer



The Angel of the North (2009) – Winston Luthuli

In 2006, the Department of Arts, Culture and Heritage of the City of Johannesburg introduced a Public Art Policy (informed by international trends) which proposed that a percentage of all new building projects should be allocated to public art. While this policy provision has not been strictly applied, it has stimulated a great deal of the investment in art in public sector building and upgrade projects in the inner city, the majority of these overseen by the Johannesburg Development Agency.

The growth in public art has however also been driven by a few visionary individuals both within the city, and within the arts community – people who have been able to carve out the possibility for artists to be involved in shaping the public realm in the face of many other competing priorities.

The Immovable Heritage unit within the Arts, Culture and Heritage department of the City of Johannesburg – headed by Steven Sack – has played an important role in creating an enabling policy

environment for public art in Johannesburg. The Johannesburg Development Agency – an agency of the city responsible for the scoping and management of major spatial development projects in problem areas or areas of opportunity – has been the major source of finance for public art in the inner city. The current CEO of the JDA, Lael Bethlehem, has been a particularly ardent champion of the public art cause. In her words:

“Public Art defines the true essence of what a city stands for and where it is headed as well as being a critical element towards the beautification of a city’s public environment. The City of Johannesburg is shaping itself up to become a World Class African City and public art is about creating a sense of place, and it has a significant impact on the local environment, and can be used to encourage regeneration and enhancements of public or private spaces.”



From L to R: Brenda Fassie (2006) - Angus Douglas; Gandhii Memorial (2003) – Tinka Christopher; Tribute to Walter and Albertina Sisulu (2009) – Marina Walsh

Three arts companies, Trinity Session (Marcus Neustetter and Stephen Hobbs), Art At Work (Lesley Perless and Monna Mokoena) and Spaza Art (Andrew Lindsay) have been the driving force behind the practical mechanics of the bulk of inner city public art projects. The Joubert Park Project – an independent artists collective - has played an important role in stimulating thinking around public art through the development of experimental and largely temporary public art interventions in the inner city. Together, they have played a key role in advocating for the value of public art, and have generated the substantial body of knowledge and expertise required to make it happen on time, on budget and according to the specifications and expectations of the client. This demanding role – part commissioning agent, part project manager - is unlike management in any other sector. It involves mediating between a lot of different interests and players – demanding artists, demanding clients, city departments, urban design and architectural firms, technical service providers and local residents and businesses. The success of these companies and organisations has been largely due to the creativity and passion of the individuals that direct them – and their extensive background as practicing artists and curators.

(based on research commissioned by the Johannesburg Development Agency from urbaninc/Joseph Gaylard)

CASE STUDY 6: MARKET AND AUDIENCE DEVELOPMENT

KZN

THE MOVEABLE ARTS FEAST – A VANS/PANSA ETHEKWINI INITIATIVE

Concept

The Durban branch of VANS/PANSA (Visual arts network of South Africa and Performing Arts Network of South Africa) submitted a proposal to the eThekweni Municipality in 2008 for a Moveable Arts Feast. This was to take the form of a gallery trail every Saturday through a nine week season by means of a hop-on, hop-off public transport shuttle as well as special events in the various galleries on Friday nights. The intention was that event would be co-ordinated by Vansa/Pansa and staged by individual galleries.

Implementation

The municipality was approached to sponsor this project through the “Celebrate Durban” season as a separate tranche of funding was available for events which fell into this portfolio. Celebrate Durban is an annual event which takes place in the month of September and is aimed particularly at the arts and culture sector of the city. In 2008 there were nine weekends in the Celebrate Durban season (five during August – Women’s Month and four during September – Heritage month). Due to its popularity this period of the Moveable Feast was extended to December 2008.

The eThekweni Municipality made a 23 seater bus available at a budget cost of R60 per hour including a driver. Brochures and press releases were printed and distributed from July. The event was free to participants.

Management

The process was managed through the Durban Art Gallery as they are a department of the eThekweni Municipality. Funds were channelled and audited through the financial systems of The Friends of The Durban Art Gallery

The Route and participating organisations

The bus started at the KZNSA Gallery in Glenwood collecting all the passengers. The Tour Guide, Zorro (a performer and artist) welcomed everyone and explained the participation of Vansa/Pansa and the City of Durban in this event. The bus sent from the Durban University of Technology Gallery in Berea to the ARTspace Gallery in Umgeni Rd and to African Art Centre in Morningside. It then toured the Northern suburbs to reach Gateway, Umhlanga where the tour stopped for lunch and visited Kizo Gallery. From Kizo it travelled back to the inner city and harbour where it visited the BAT Centre and then to the Durban Art Gallery and final drop off point at KZNSA Gallery. The various stop-offs made special efforts to accommodate the event – these took the form of talks by artists, refreshments, demonstrations.

Beneficiaries

The members of public were varied in age and racial characteristics. After an initial slow start of only 2 bookings the bus quickly gained popularity and became fully subscribed on a regular basis. This assists in building audiences for art and also enables people without transport to visit various art sites. (A number of older people took advantage of this).

According to a report submitted to City Council the galleries recorded increased sales on the days that the tours visited as well as increasing their profile. Part of the budget was made available to the participating galleries to provide refreshments, advertising, pay performers, artists, hire of equipment, run workshops etc.

Other budgetary items included a part-time project manager, publicity services, publicity material, painting and branding of the bus, printing and distribution of bus timetables, fee for tour guide and administration, rental of bus and driver.

The following received income:

1 Project Manager

1 bus driver

1 tour guide

1 Publicity Agent

Various performers, artists, caterers taking part in individual gallery events

7 galleries each received R15 000 (out of a total budget of R195 000) These were: Art for Humanity (DUT), Durban Art Gallery, KZNSA Gallery, DUT Gallery, Kizo, Artspace, African Art Centre. Each gallery was given R15 000 to organise special events.

23 people weekly made use of the bus. Over a period of 9 weeks 207 members of the public used the bus although many other people attended the events.

The direct financial benefit to artists and galleries is not quantifiable however the biggest advantage is the growth of an audience.

Current status

The project has been repeated for 2009 with all galleries participating. As at end October 2009 the run of the bus has been extended due to popular demand. There is a waiting list of attendees and the gallery's have joined in requesting its continuation from the eThekweni Municipality who will continue its sponsorship beyond the short "Celebrate Durban" season. It has now expanded to include a Heritage Tour.

Challenges

An Art Map had been suggested as part of the project and although much discussion and work has been done to date this has not been produced. The dedicated bus (which has been branded) has not been utilised in between the 2008 and 2009 events. It has been parked at Municipal premises. This offers an opportunity to extend the season and use of the bus.

CASE STUDY 7: VISUAL ARTS IN LOCAL ECONOMIC DEVELOPMENT

NORTH WEST PROVINCE

THANYA ART STUDIOS

Thanya Art Studio was founded in September 2004 as a community arts programme. It was registered under the name of its founding members, Mr Charles Mokgeti, Mr Aubrey Mmereki and Mr Thabang Modisapule.

Thanya Art Studios was established as a means to cater for the growing needs of the visual artists and crafters in the area. Motivation behind the establishment also linked itself to the fact that the Vryburg area was generally not well serviced by government initiatives and that artists needed to formalise themselves into a legal formation in order to qualify for opportunities such as the One of a Kind show at the Decorex show in Johannesburg, the Botswana Trade Fair and the festivals in the province and elsewhere.

The art studio currently consists of 15 artists and crafters working under the banner of the Thanya Art Studio and includes work across the mediums of:

- Printmaking
- Painting
- Drawing
- Paper Sculpture
- Ceramics
- Craft and
- Photography

Three of the artists work full time. All of the artists and crafters associated with the studio are male, and range in age from 25 to 50. The majority of the artists and crafters are self trained although a few have had exposure to training through the Mmabane Community Centres or through the photographic workshop in Klerksdorp.

Artists and crafters working under the project banner reside and work from across Vryburg, Taung, Khunwana, Klerksdorp, Mafikeng and Ga-Rankuwa. In essence this art studio could be equated with an arts association for artists and crafters in the western region of the province.

It is currently estimated that 5 of the 15 artists are making a living through their art, however this depends on their tenacity in terms of the marketing of their work and with whom they are in contact with for assistance.

The centre focuses mainly on visual arts programmes, with a different section being dedicated to crafts and to special programmes for the local communities as well as art in schools.

These programmes range from the beading lessons, painting and drawing lessons for both local communities and school kids. This centre does a lot of good work for the adult learners in terms of practical skills while also providing space and opportunities for local artists to exhibit artworks at the University of Potchefstroom on a yearly basis.

The most popular programmes offered by the studio include the art in schools programme as well as the mosaics and sewing programmes for female crafters who participate in festivals in and around the North West Province.

Thanya Art Studios has managed to raise funding from DAC, the NAC and local businesses to run these programmes.

This grouping of artists also work in collaboration with L.N.B Arts in Taung which also offers training to community artists. The studio realises that they are often the only ones to offer this skills development in the area and therefore that they have a niche foothold in the market. The training is however not accredited. The numbers of persons to go through training ranges from groups of 5 to 20 and to date the studio and its various artists and crafters must have serviced approximately 80 – 120 artists and crafters in the area. The studio also offers craft product design and technical training. In addition artists and crafters also supply services related to t-shirt printing for corporate and public agencies as a means of additional income production. The studio is not always guaranteed that they will attract funding for training, hence the need for this product diversion.

What is significant about this studio is that it represents the largest amount of black artists and crafters in the province second to the Mmabana centres, which are publicly funded.

Challenges faced by the studio include access to raw materials, access to established and credible galleries and distance issues to arts activities taking place in other areas. They are almost equidistant between Kimberley and Potchefstroom, the two areas they rely on most for provincial exposure and many artists are not able to afford the transportation costs to these areas.

Project contact person: Aubrey Mmereki: 084 305 4422

CASE STUDY 8: SKILLS DEVELOPMENT THROUGH PUBLIC ART
FREE STATE
CEMENT AND MOSAIC PROJECT
OLIEWENHUIS ART MUSEUM 2007 - 2008

Project funded by DAC (The Department of Art and Culture sponsored R100 000 towards this project that started in 2007).

Fourteen unemployed Mangaung (Bloemfontein) residents (with various artistic abilities and experience) were selected to attend a 20-day workshop where they were introduced to the use of cement and mosaic as a medium.

The first phase of the workshop entailed the making and decorating of ceramic tiles, cutting and sorting broken tiles and developing their ideas and sketches for their proposals.

During the second phase of the workshop the participants were trained in laying mosaic tiles and manufacturing the inner structures for cement sculptures. Hereafter they completed their proposals and made maquettes. After the workshops, 14 proposals were submitted to the Advisory Committee of Oliewenhuis Art Museum for selection. Five maquettes were selected and the building commenced. Four sculptures were erected on-site in the front garden of the Museum and one sculpture was erected in the back garden.



Love Sofa by Ithumeleng Moamogwa and assistants

During the creating phase, the public was invited to observe the creation process. The artist-in-resident concept had various advantages: it gave the artists the opportunity to communicate with visitors and to market themselves and it also served as a valuable educational tool for the public and school groups.

The project aimed to serve the community of Mangaung well. It gave participants an opportunity to create jobs for themselves and greatly improve their quality of life. By teaching them a variety of marketable skills as well as the necessary skills to market themselves successfully, this project can have a significant influence on the participants' lives.

The main objectives were achieved and in addition to the five functional sculptures that was built in the gardens of Oliewenhuis, a large part of the top of the wall separating the parking area and the front lawn was decorated with mosaic work by two participants and the public.

The sculptures are 'used' frequently by visitors to sit on and children love to play on the *Frog Slide*. These are now permanent features at Oliewenhuis Art Museum and have been acquired to our Permanent Collection.



Frog slide by Sikhumbuzo Wesley Tokwana and assistants

There has been a lot of interest in the project and numerous requests for information on the participants and their skills have been received. A follow-up workshop in marketing- and basic business skills (such as providing quotations and invoicing clients) was presented to all the participants with the aim of empowering them to do commissions and projects independently. They also received ongoing support and assistance from the project leaders, Ester le Roux and Liz Ranger.



Nellie working on the wall

One thousand (1 000) catalogues containing participants' information were compiled and printed as an additional marketing tool. Oliewenhuis Art Museum and the participants distribute these catalogues. All fourteen participants, sponsors and other contributors received a Cement and Mosaic Project T-shirt. Labels and an information board were installed adjacent to the sculptures. A press- release was compiled and the project was well publicized.

The opening function took place on 13 May 2008. Approximately 130 guests attended and had the opportunity to meet the fourteen participants. Ms Lindi Ndebele-Koka (Department of Art and Culture: Director, Multi Media) delivered the opening address. Mr Andries Oberholzer (Department

of Art and Culture: Deputy Director, Visual Arts) and Ms Reinette Stander (Department of Arts and Culture: Assistant Director, Heritage Institutions) attended the opening function.

Transport was arranged for the participants from their homes in the townships and Botshabelo to Oliewenhuis Art Museum.

Some of the more notable interests are:

- Four of the participants worked temporarily at the National Museum to assist with the completion of an exhibition hall.
- Ester le Roux had a meeting with architect, Anneke Wolfaard who received the tender for renovating Hoffman Square for 2010, relating to a possible collaborative mosaic project and competition with Oliewenhuis Art Museum. Oliewenhuis Art Museum will possibly assist them with arranging a mosaic-design competition for primary schools and recruitment of artists to do mosaic walkways and sculptures.
- Ester le Roux had a meeting with council member Jan van der Merwe and representatives (including the Deputy Mayor of Ghent) from the Office of North- South Cooperation, City of Ghent. They were interested in the Cement and Mosaic Project and the possibility of doing a similar project in a public park in Ghent, Belgium.
- The National Museum commissioned Piet Diradingoe, Wesley Tokwana and Spoon Masukela to create a drinking fountain from cement and mosaic at the National Museum. This was completed in August 2008.
- The University of Johannesburg have approached us regarding collaboration for cement and mosaic sculptures in the campus gardens. Curator of the UJ Gallery, Annelie Dempsey is planning a visit to Bloemfontein shortly to discuss the possibilities and the way forward. They have indicated that they would like to have drinking fountains and benches installed on campus.

Information kindly supplied by Oliewenhuis Art Museum



Table of Honour by Ratlhor Matsheka and assistants



Basadi Bafreistata by Piet Diradingoe and assistants



Family Chairs by Leepo Masukela and assistants

CASE STUDY 9: An Independent Initiative for Development and Market Access in a Rural Context

Steinkopf Art Gallery

Northern Cape

The concept for the Steinkopf Art Gallery was initiated by two young artists, living and working in Steinkopf towards the end of 2007. These artists, Pierre Cloete and Granville Cloete saw the need to establish the gallery after the craft centre in the village, which had previously been funded by DAC, was closed down in late 2007.

According to the artists, it has taken them more than twelve months to negotiate the building which they are currently using for the purposes of the gallery as well as some studio space for themselves. The motivation behind the opening of the gallery was as a result of the two artists realizing the need to find access to the market place on their own, without relying on the local municipality or the provincial department of arts and culture. A number of visual artists live and work in the area and thus they realized that there would always be a need for the gallery.

Prior to the establishment of the gallery, artists like Pierre and Granville had to rely on make-shift structures along the tourist routes of the area. Challenges in terms of the weather as well as the high rental prices the artists were forced to pay to the municipality for the right to exhibit and sell their artworks along the road led to the artists realising the need for alternate accommodation.

The gallery currently serves the needs of over 30 artists from the area, and operates without funding. The majority of sales in the gallery come from tourists travelling to the Richtersveld area as well as Namibia. Steinkopf locals, although supportive of the initiative, generally are not able to pay market related prices of the artworks. Work for the local audience therefore relies on family portraits etc, at a reduced rate. The significance of this gallery initiative lies in its connection to the deeper legacy of the area.

The Steinkopf area has a deep legacy in terms of the visual arts. It is understood that the “Steinkopf Art Collection”, a body of visual arts works donated and exhibited in the former Rhenish Missionary Church in Steinkopf, originated through the initiative of a descendent of Reverend Brecher, the priest who initially started the mission in 1819 and who later named the village as Steinkopf. The church in which this collection is housed, was declared a national monument under the Apartheid regime and currently still allows visitors to view the works.

Contribution of the project to social development of the area

The Namakwa area is generally a very under-resourced area. Although it attracts a considerable number of tourists in terms of the flower season, the Richtersveld and the travel to Namibia, the understanding of how the Cultural Industries can and do contribute to socio-economic developments in the area are generally not understood.

Steinkopf itself is an area with a deep seated identity in terms of the Nama people. A former “Coloured Reserve” with a history of missionaries, the Nama identity continues to pervade the area in terms of various cultural practices. Attempts to further revive this and instill it in the education system are also currently taking place with the District offices of the Department of Education developing new curricula which incorporates Nama Indigenous Knowledge Systems.

The visual arts are one of the legs of this identity. As provided in the database, there are a number of visual artists living and working in the area, with numbers which could be compared to that of the

Kimberley region. However, owing to the isolation experienced by the region as well as the understanding of the residents of the Namakwa area that the province is generally not interested in it, visual artists have tended to give up on working towards any developments in partnership with government. A factor contributing to this is that government also tends to emphasise the importance of the performing arts above that of any other form of art in the area.

The visual arts however have a significant role to play in the area, and are seen by many residents of the Namakwa area as being very significant towards development. While the artists of the area are almost totally self-trained, their work is some of the finest in the province, especially in terms of subject matter and techniques. Artists have identified the need for further support for their area in terms of market access assistance, marketing and selling skills. They do not feel that they need a community arts centre and the majority of artists prefer to work alone, at home.

CASE STUDY 10: The Visual Arts as a Tool for Community Rehabilitation
South African San Institute
N//aoh Djaoh Arts and Crafts,
Platfontein, Kimberley, Northern Cape



The N//aoh Djaoh Arts and Crafts project runs under the umbrella of the South African San Institute (SASI). SASI was established in 1995 as a means to assist the San in reclaiming their rights in society. In order to provide appropriate answers to the questions of the study, it is necessary to contextualize the Arts and Crafts project within SASI. The following explanations of SASI are taken from their website:

SASI's goals and aims are achieved through a number of projects in the various programmatic areas:

Programme Area: Culture and Heritage Management

The objective of this programme is to support the San with research and management (control) of their cultural and natural heritage. In order for this objective to be achieved the following key areas of outputs /targets would need to be addressed:

1. The establishment of multi-media archives, community museums with adequate information about all aspects of the San in both Upington and the Kalahari.
2. Promotion of language development and mother-tongue education
3. The organisation of music and dance into a professional and sustainable art form
4. Oral history promotion and the development of materials

Programme Area: Community & Social Development

The objective of this programme are to empower the San communities to take responsibility for meeting their own socio-economic needs and aspirations through a range of projects which address

educational, health, welfare, livelihoods and the political environments that have direct impact on these communities. In order for this objective to be achieved the following key areas of outputs /targets would need to be addressed:

1. The establishment of well functioning ECD structures in the community that will ensure that the San children receive pre-school education of a good quality.
2. The utilisation of multi-targeted approaches to ensure food security within communities.
3. The improvement of the physical and psychosocial health status of the communities
4. The improvement of communities' understanding of political processes that impact on their development and to promote better consumer behaviour

Programme Area: Sustainable Livelihoods

The objective of this programme is to empower the San communities to take responsibility for meeting their own socio-economic needs and aspirations through a range of projects which address educational, health, welfare, livelihoods and the political environments that have direct impact on these communities. . In order for this objective to be achieved the following key areas of outputs /targets would need to be addressed:

1. The establishment of a tracking school that markets and promotes tracking as a formal profession
2. The development of a self sustainable cultural and eco-tourism enterprises, i.e. Uruke Bush camp Development and Footprints of the San.
<http://www.openafrica.org/africa/ZA/ZANC/ZANCSan>
3. The establishment of a resource and information centre in the Kalahari that would adequately provide for the needs of tourists, researchers and visitors.
4. The development and implementation of a sustainable arts and crafts ventures, i.e. N//aoh Djao, Sisen and #Khomani Home & Textiles.
5. The establishment of sustainable small-scale farming ventures
6. The support of CPA's to develop and implement sustainable land use strategies.

Programme Area: Leadership empowerment and capacity building

The objective of this programme area is to promote democratic, representative San leadership structures that have the necessary skills that will enable them to adequately fill their roles as leadership. In order for this objective to be achieved the following key areas of outputs /targets would need to be addressed:

1. Supporting the development of well functioning independent community governance structures, i.e. South African San Council-SASC, Communal Property Associations-CPA's, Community Development Committees-CDC's
2. The development of a youth & women cadre who will make a positive contribution towards the development of the San through the FRESH programme.
3. To respond to the request for support and inclusion from other San communities.
4. To support the involvement of San within national, regional and international initiatives that promote the rights of indigenous people.

Programme Area: SASI Institutional Capacity Building

The objective of this area is to foster and implement the principles of a learning organisation so as to continue to improve in service delivery and accountability to communities, partners and donors. Outputs in this area include:

1. Implementation of organisational fundraising strategy.
2. Annual review and planning processes.
3. Improvements to administrative systems, based on feedback from review and planning processes, so as to facilitate effective reporting to communities & donors.
4. The development of all Staff so as to improve service delivery.
5. Training of new Board members in Leadership and Governance.
6. Co-operation with other organisations on a provincial, national, regional and international level who share and identifies with the vision and ideals of SASI.

Programme Area: Legal Support Programme

The objective of this programme area is to provide strategic legal support to the San communities so as to ensure and secure rights for land development, language recognition and benefits from research and the use of cultural knowledge. In order for this objective to be achieved the following key areas of outputs /targets would need to be addressed:

1. Providing legal support to the community governance structures that will further development initiatives.
2. Provide legal support to the Central Kalahari Game Reserve CKGR coalition
3. Support to SASI, the Kuru Family of Organisations-KFO, WIMSA, Hoodia Trust and other San Organisations
4. Supporting the South African San Council-SASC in securing intellectual property rights

The N//aoh Djaoh Arts and Crafts project is for many San the only source of income they have. The project, operating from Platfontein just outside of Kimberley, currently has 92 artists on its database. Two other arts and crafts projects are also operating under the SASI umbrella, these include the Khomani San project in Upington and the Sisen project. The project at Platfontein concentrates on painting and linocuts while the other projects concentrate on crafts and textiles.

The N//aoh Djaoh project works across a range of media, including that which is traditionally referred to as craft. Artists produce linocuts, painting and sculptures while at the same time also producing textile, eggshell and feather based works. Because the works of these artists have been exhibited in galleries provincially, nationally and internationally they are all considered to fall under the banner of visual artists.

While the project is for the majority the only source of income, the project also struggles. Challenges faced include:

- Lack of trained staff support to assist with issues like fundraising, report writing, marketing etc. Currently Keile in the Platfontein project is responsible for all three projects under SASI and struggles to achieve all that she is meant to without support
- A jagged stream of income. Artists are not always successful in selling their works monthly, leaving many without any form of income for those months
- The cost of getting raw materials to the project

Artists in the project have received skills development workshops from Mark Attwood as well as Bob Hosterman, however it may be argued that these workshops were more commercially driven than skills driven. Dumisano Mabaso, currently an artist in residence at the William Humphreys Art Gallery, also provides skills workshops for artists.

The project is dependent on sales and funding for sustainability. In the past it has received assistance from DAC as well as the Arts and Culture Trust. The project also had an arrangement with the McGregor Museum for the exhibiting of work and products at the Wildebeeskuil Centre, however

owing to not having sold products at this site, this arrangement came to an end in July this year. Generally the project really struggles to sell to locals.

A method that is currently being explored by SASI to profile the project and to increase its ability to earn an income has been the development of a multi-sectoral project including film, theatre and the arts. Please refer to the attached newspaper article.

NEWS



ON DISPLAY: Misty Brodiaea (Artistic Director of *Son Of the Wind*, left) and Keila Mierke (Art and Craft Project Manager) with some of the Art works which will be exhibited at the William Humphreys Art Gallery from Thursday evening.

Picture:
Lianne Butler

San art exhibition to open in city

STAFF REPORTER

THE WILLIAM Humphrey's Art Gallery and the South African San Institute will open a San Art Exhibition to showcase works by local artistes, including oil paintings and prints by members of the !Kun and Kwhe communities currently living at Platfontein.

These artistes are members of a group called N//aoh Djaoh San Arts and Crafts, which was started in 1995 to help develop and inspire artistic talent among the community.

The exhibition will open at 6.30 pm on Thursday.

Other works on display will include one of set pieces and photographs documenting the involve-

ment in the upcoming Sasi theatrical production, *Son of the Wind*, which is scheduled to premier in the Northern Cape Theatre on June 19.

Son of the Wind forms part of the Northern Cape Department of Sports, Arts and Culture's 2010 legacy project which aims to highlight the local diversity of the province.

The exhibition and production aim to bring to light the culture of one of the world's oldest civilisations.

The play was written and will be directed by US Peace Corp Volunteer, Misty Brodiaea, who has been working on the project for more than a year.

According to Brodiaea the pro-

duction is the story of how the community at Platfontein came to settle in the Northern Cape after the war in Angola.

One of the centerpieces of the exhibition will be a life-size replica of a baobab tree created by Rocky Mafafo.

The tree will be used as one of the major set pieces for *Son of the Wind* and according to Mafafo the exhibition has given him some great experience.

"The tree will be made of fiberglass but needs to have branches strong enough to support the weight of an actor," he said.

"It is also a new experience for me to work with actors and I am very much looking forward to both the production and the exhibit."

CASE STUDY 11: PUBLIC ART MUSEUMS AS DEVELOPMENT AGENCIES
FREE STATE WOOD CARVERS

OLIEWENHUIS ART MUSEUM



Justinus Khoalibe, Waterbird

Ten woodcarvers from the Bloemfontein – Mangaung area as well as outlying areas have been identified by the previous curator of Oliewenhuis Art Museum, Sharon Crampton for continuous support. The new appointed curator, Ester le Roux has also pledged her assistance and support towards the artistic well being of the wood carvers. Although this is not an official project, the support and opportunity given to these artists by Oliewenhuis, are admired by people in various circles and art patrons appreciate their concern towards this unique group of sculptors.

The following highlights some of the support and assistance given to the group during the past year.

Ester le Roux arranged for 5 artists to attend the PPC Cement workshop hosted at Oliewenhuis Art Museum in June 2008.

Transport was arranged for 7 artists from disadvantaged communities to the opening of the Dungamanzhi/ Stirring Waters exhibition.

A woodcarving of Bennet Ntsung was entered into the SASOL New Signatures Art Competition and the artwork was selected to go through to the final judging in Pretoria.

The Education Officer arranged for Wesley Tokwana to attend a week long sandstone-carving workshop at the UFS in June 2008.

The Education Officer arranged for 10 local, disadvantaged woodcarvers to attend a woodcarving workshop presented by Carl Roberts on 24 October 2008.

Linda Malan and Kgosimang Mothibi collaborated with Rina Els from Pallean Arts, Excelsior to exhibit artworks by local woodcarvers at the Claerhout Festival that took place in Excelsior from 13 to 15 February 2009. Linda Malan and Kgosimang Mothibi travelled to Excelsior to deliver and fetch artworks.

Linda Malan, assisted by Prieur du Plessis entered artworks by 8 local woodcarvers for the Craft Awards Competition by Arts and Culture in Johannesburg via e-mail. 9 of the artist's works were selected and sent to Johannesburg. Two of the artists, Piet Diradingoe and David Molapisi won provincial prizes. All the winning pieces will be entered into a catalogue.

The woodcarvers are also supported by exhibiting their sculptures in the front portal where the public can view and buy the work. A special sale of sculptures by local woodcarvers took place on 29 and 30 November 2008 in the back gardens of Oliewenhuis.

Information kindly supplied by Oliewenhuis Art Museum



Piet Diradingoe, The Game is Ours



Piet Diradingoe, World Cup

CASE STUDY 12: BUILDING NEW INSTITUTIONS FOR CONTEMPORARY ART

The Africa Centre (Western Cape)

Based in Cape Town, the Africa Centre is both a physical entity and an ongoing philosophical process. It has emerged, after two years of research, as a multi-sited and multi-usage space where visual, intellectual and performance cultures of Africa are celebrated. The Africa Centre is managed by an Administration team and a team of project managers who are accountable to a Board of Directors.

The objectives of the Africa Centre are to:

- Create an international arts and cultural centre in Africa which documents, disseminates and celebrates both the visual and performing arts throughout Africa and its Diaspora
- Develop a meaningful theoretical. Literal and philosophical space for artistic dialogue and engagements
- Interrogate the role, identity, transience and performance of art
- Build on best practice and pursue innovation in art and cultural theory, practice and praxis
- Pursue new audiences and the means and method of engagement
- Explore ways in which communities of the continent and its diasporas can engage with their heritage and histories and become entrepreneurial owners of their own cultural industries
- Use the arts and culture to enhance relationships within and between African nations, strengthening ties and promoting nation-building across the continent

The Africa Centre is entering a new phase of resource mobilisation which includes engaging with a broader pool of local and international donors and organizations to obtain support for expanding its programme content. Current projects are

- The Spier Contemporary (three project managers)
- SPARCK (1 project manager)
- Infecting the City (1 project manager)
- The Badilisha Poetry Exchange (2 project managers)
- The Pan African Space Station (1 project manager)

In addition to facilitating its on-going projects, The Africa Centre also plays the role of a donor. It is envisaged that once this role grows, the AC will be a channel for arts and culture funding across the continent. Significant to this role is that it complements efforts in making aid to arts and culture organizations more effective and meaningful Two of the current funded projects focus on interdisciplinary research (*African Centre for Cities*) and cultural journalism (*Chimurenga* publication).

The Africa Centre has to date received its core funding from a local donor Spier Holdings. Spier Holdings has committed R10 million per annum in support of the Africa Centre's operations for the organisation's first five years. The Africa Centre has also received a range of other contributions from the private and public sector.

The Spier Contemporary is a biennale exhibition of contemporary South African arts and an accompanying series of awards. The project is of benefit to a range of role players in the visual arts industry such as artists, curators, development officers, writers and designers. Award winners are offered the opportunity to structure their own career development plan by residency or some type of self –study including an internship or travel in order to research or collaborate with other artists, curators or exhibitions. The 2010 event is intended to showcase around 100 selected works with

each artist qualifying for a fee of R4000. From the selected works, five or six winners, chosen by the public, will share R800 000 in award monies to advance their careers.

CASE STUDY 13: PROVIDING SPACE FOR NEW WORK AND EXCHANGE GREATMORE STUDIOS (Western Cape)

Greatmore Studios, a registered trust located in Woodstock, Cape Town, was established in November 1998. The project evolved out of a need for studio space and art-making facilities by a cross-section of the city's artists. Today the studio brings together artists from diverse cultural and national backgrounds under one working environment. Local and international visiting artists work together in an atmosphere of cooperation, interaction and cultural exchange. Through this approach, artists are given opportunities to discover new creative directions and innovations. Fourteen studios are rented as private spaces where local and international artists work on a full-time basis. Four of the studios are reserved for visiting artists from abroad or elsewhere in Africa and South Africa. Greatmore Studios is an artists-run initiative. The committee and director work closely with an administrative team and accountant.

Greatmore, and its workshop initiative, Thupelo, grew out of the first Triangle Arts Trust workshop held in New York in 1982. It follows the Triangle model of providing studios and residencies, facilitating workshops, and supporting outreach programmes to raise awareness of art. Exhibitions, workshop open days and public events provide platforms for engaging audiences and introducing the latest works of new and established artists to local and international audiences. The first Thupelo workshop held in Africa took place in 1985 in Johannesburg. At the end of the 1980s, Thupelo moved to Cape Town, where it has sustained itself till the present. The Thupelo Arts and Craft Workshop in 2008

gave all the artists a space to interact and exchange artistic techniques. Less experienced artists worked alongside professional artists with the hope of extending and deepening their art practice.

Greatmore Studios offers permanent, visiting, curating and mentoring residencies. Greatmore Studios brings together artists from diverse cultural and national backgrounds in a creative working environment through its residency programmes. The residencies encourage new ideas and stimulate professionalism, creativity and productivity. There are 12 studio spaces allocated for residencies. The residencies are geared towards local and international artists and curators. The mentorship residency is aimed at emerging artists. All other residencies are aimed at mid-careered artists.

Eight studios are rented as private spaces where local artists work on a full-time basis as permanent residents. The residency can last from 6 months to 3 years depending on availability and the needs of the individual. In addition to being provided with studio facilities and administrative support, permanent residents can also benefit from Greatmore's digital programme. Through this programme, permanent residents have unlimited access to the internet, enabling them to keep up to date with events, including exhibitions, residencies and competitions. The programme also includes training courses in selected applications and assistance in building websites. Permanent resident artists are required to participate in outreach programmes. These activities range from slide shows and workshops to lectures and presentations at various local institutions and schools as well as in communities.

Greatmore Studios has in the past worked mainly with mid-career artists however, the recently placed "mentoring month" programme has proved to be very successful. Due to this success, a critical need to continue nurturing a new generation of younger artists remains. Twice a year a month long mentoring residency is offered for up to 6 mentees. The co-ordinating of each mentoring residency includes a brief introduction to the Cape Town art world and basic computer and marketing training to better manage and develop their careers. The residency also provides the artists a space to experiment with new art techniques and styles, pushing their work to new levels. Mentee residents are offered, shared studio space, accommodation, per diems and an exhibition in

Greatmore's Gallery space. Successful applicants are accepted into the residency programmes via a structured application process.

The aim of the Visiting Artists Residency is to facilitate cultural exchange and creative dialogue by bringing together international and local artists in a stimulating and supportive environment. All artists who participate in the Visiting Arts Programme as well as local artists in residence at Greatmore Studios are required to participate in outreach programmes in and around Cape Town. The aim of the programme is to promote awareness and understanding of the visual arts in the broader community. Outreach programmes take the form of art workshops for children and adults, slide shows, research projects, video or digital presentations, exhibitions, lectures and discussion groups. These events are held at schools, tertiary institutions, community organizations or at Greatmore Studios, where a communal workshop space and a gallery can be used for activities.

CASE STUDY 14: BUILDING A VISUAL ARTS ENTERPRISE IN A PERIPHERAL CONTEXT

Canafri Pottery (Limpopo)

The project was registered in 2005 by two dynamic and multi-skilled artists, Lerole Dikgale and Mathomo Mogano. The Project is based in Seshego Zone 4, 10km from Polokwane City, the economic hub of Limpopo Province.

Although the initial idea was to do pottery, the two members found this undertaking to be too labour/resource intensive. They then diversified into signage, glass frosting and producing fine arts which they mainly use in public and private exhibitions such as exhibitions in local museums/galleries, national exhibitions such as the Rand Easter Show, as well as private exhibitions.

They found a niche market in the signage and glass frosting sector and the mainstream competitors are using conventional methods while they add a touch of artistry into their products and they make their works to stand out.

Private businesses, individuals, schools and universities make up a large part of their clientele of over 350 people. Their monthly income average R12 000 to R15 000 which make up for overheads which include among other things: their salaries, rent, materials and transportation of products to clients and market places.

The two entrepreneurs regard their venture as being sustainable and are saddened by the non-commitment of government, both national and provincial in towards building local cultural industries that may contribute positively toward local economic development. They say although they normally start working at around 09h00am, it is difficult to say what time they knock off as this varies from workload and at times they finish work at 03h00am.

The project has managed, for four years, to keep two dynamic young artists in employment. Its positive impact is also felt by local retailers who supply them with necessary materials to produce their commodities. Unlike in other cases where artists seek alternative employment to compensate for meagre income generated by artworks, Canafri members are wholly sustained by their artworks.

CASE STUDY 15: VISUAL ART AS A THERAPEUTIC TOOL

The Red Shoe Project, Grahamstown, Eastern Cape

The Red Shoe Project is managed by Sally Scott, teacher and artist. Sally Scott is a fibre/textile and landscape artist and has been teaching art for almost thirty years. She has run numerous creative sewing workshops and most recently has developed The Red Shoe Workshop, a project designed to give women a voice and to build self esteem. She has run 5 workshops in Grahamstown so far, but intends to take the project further afield, around South Africa and overseas.

Description of the project:

The Red Shoe Workshop

The idea for this project emerged after she read the Hans Christian Anderson story of *The Red Shoes*, as told by Clarissa Pinkola Estes in her well known book *Women Who Run with the Wolves*.

The story centres on an orphan girl who makes her own pair of red shoes out of the scraps of material that she has collected off the streets. When a wealthy old lady comes by in her carriage one day and offers to take the girl away to a better life, she cannot resist and climbs aboard. On arrival at her new home, the old lady strips the little girl of her clothes and shoes and throws them all in the fire. As the red shoes get enveloped in the flames, the child cries out at her loss. From this point on the obsession to replace the red shoes begins, and the story takes us on a manic trail as she replaces her much loved hand-made shoes with new shiny ones that magically cause her to dance, and dance and dance, until she spins completely out of control and the woodsman is forced to chop off her feet in order to make her stop.

There is much that one can read into this rather horrific story, but Sally was struck by how easily the little girl was seduced into giving up her hand made shoes for the promise of something better. How often that happens in life, how easily one is seduced by something that looks good or better than what we already have. It's only when that which we value has gone that we realize what we have lost.

So in this workshop one stops to consider what is important in our lives. What are our red shoes? Through a process that begins with reflecting upon their lives, the students create a pair of shoes into which they weave their stories.

The shoes become a metaphor for authenticity, and for that which we cannot and will not live without. This workshop gives the opportunity to come out of hiding and express who we really are. The shoes are there to remind us to believe in ourselves – to hold onto all that is precious – our creative life, our voice, our passion.

1. Impact of the project: Judging by the stories of the participants and the reactions of the public who viewed Sally's recent exhibition *Intertwined*, of which the Red Shoes were a part, this workshop has a very powerful impact. It strikes right to the heart of humanity; everyone can relate to it, it appeals to all ages and races of both men and women. For many students the making of these shoes has been life changing.
2. Number of employees: Nil at the moment, but she envisages that she may need help in the future, especially if this workshop goes into the townships where she may need an interpreter.
3. Contributions to economy: Difficult to estimate at this stage.
4. Contributions to social development and cohesion: Vast. The very nature of the workshop is about self empowerment and realising that we all share a common bond. In a very short span of time Sally has seen a visible change in many of the students who have attended this workshop.



Samples of the red shoes produced at previous workshops hosted by Sally Scott

CASE STUDY 16: THE VISUAL ARTS IN EMPOWERMENT AND POVERTY ALLEVIATION

Keiskamma Trust, Hamburg, Eastern Cape



The Keiskamma Trust promotes health and hope through art, music, HIV/AIDS treatment, poverty alleviation projects and education initiatives in the village of Hamburg and its surroundings in the Eastern Cape, South Africa.

Keiskamma Art Project

Was created in 2000 which is a non-profit Non Governmental Organisation providing job, skills, training and hope in the Xhosa community of Hamburg and surrounding villages in the Eastern Cape. It is a branch of the Keiskamma Trust that was founded by Doctor and Artist Carol Hofmeyr, Shoprite-

Checkers Woman of the Year 2007 in the category Arts, Culture and Communication.

Today the Art Project employs 137 artists and crafters on a permanent basis carrying on its mission of poverty alleviation and skill development. The artists produce craft items and large artworks amongst which the Keiskamma Tapestry, about 200m long, is on permanent exhibition at the Houses of Parliament in Cape Town. The Keiskamma Altar piece has toured North America and England for two years in the most prestigious cathedrals, such as Washington and Southwark. These artworks tell the history and stories of their community, especially the fight against HIV/AIDS and the restoration of their health and dignity. In that sense, the Art Project has become the Public Relations of the Keiskamma Trust incorporating an AIDS Treatment Centre, a Heritage Site, and an Education

Programme

The sales of the artworks benefit 137 local artists and crafters. In the local community, that counts 3000 inhabitants, the unemployment rate is above 90%, which makes the Keiskamma Trust the first employer of the area with close to 300 employees - roughly 10% of the community. In this context, the Keiskamma Art Project absorbs 45% of the jobs supplied by the Keiskamma Trust. The Artist Fee charged by the Art Project contributes to the stipends of the 11 local managers of the Art Project, who are the coordinators of the over 100 crafters.

Achievements

Although they are making small pieces such as wall hangings and cushion covers, they also produce monumental Artworks. Each and every little piece that is made is part of the ongoing production that has its roots in the concept of one of their monumental works.

The first Artwork that actually started the Keiskamma Art Project is titled: *Vuselela*.

Vuselela means Restoration. Their first exhibition at Grahamstown National Arts Festival in 2002 was showing embroidered garments.



Vuselela Artwork

Second Artwork: *The Keiskamma Tapestry*.

The Keiskamma Tapestry was inspired by the *Bayeux Tapestry*. It follows the same long format and maintains its original concepts which are to tell a history of invasions and wars. *The Keiskamma Tapestry* is telling the history of the Eastern Cape and its Frontier Wars. Shortly after, they also created another similar tapestry with the same concept but changing the colours. Whereas *The Keiskamma Tapestry* was embroidered on terracotta hessian, the second tapestry was embroidered on cream Hessian and is therefore called *The Cream Tapestry*.



The Keiskamma Tapestry which is permanently housed in the Houses of Parliament in Cape Town.



One of the 15 panels from the *Cream Tapestry*

Third Artwork: *The Keiskamma Altar piece*.

The Keiskamma Altar piece was inspired by the *Issenheim Altar piece*. It is the exact format to the size, shape and opens as a triptych. Like the *Issenheim Altar piece* was telling the story of an unknown disease in the Middle Ages, *the Keiskamma Altar piece* is telling the story of AIDS in the Hamburg community. The process of creation was the opportunity to bring more education about HIV and AIDS to the community of artists. It has been on tour for two years in North America, both Canada and the United-States, and was also shown in Southwark Cathedral in London (UK) in October 08.



Keiskamma Altar piece

Fourth Artwork: *Creation Altarpiece*

The Creation Altar piece was inspired by the *Ghent Altarpiece* that has a lot of possible interpretations. They chose to study the one that refers to abundant nature and Creation and therefore came up with the idea of observing their own environment, a theme that also reflects a concern for environmental issues.

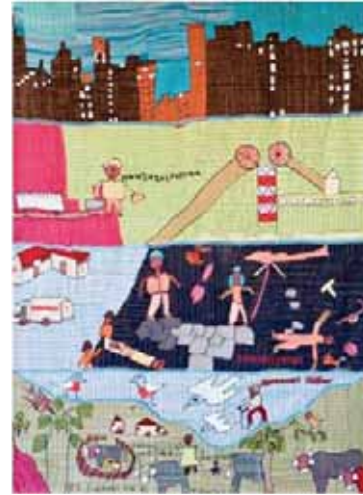


Fifth Artwork: *Dreaming of Johannesburg*

In 2006, the Keiskamma Art Project took part to an exhibition at Everard Read Gallery in Johannesburg. The tapestries that were presented told the dreams of the artists and their wishes to be in a big city.



*Dreaming of owning a fruit shop - Numgcobo Nompunga
Tinta*



My father's story - Nonzuzo

Sixth Artwork: Hamburg life

At every stage of the Keiskamma Art Project's history, there has always been a wish to tell about the artist's life. A life made of creativity, of hope, of happiness, but also a life of fight against poverty and HIV and AIDS. Several exhibitions and commissions have consisted in making tapestries that tell this story.



Hamburg Happy Life

Designed by Nozeti Makhubalo
Embroidered by Bodium Studio
edited by Ntilini Studio

EXHIBITIONS AND PUBLIC ARTWORK BY THE KEISKAMMA ART PROJECT:

- 2002 July –Grahamstown Arts Festival with the Vuselela garments**
- 2002 National Awards Exhibition in Newtown in Johannesburg
- 2002 Exhibition in Cotswolds and Oxford, United Kingdom with hand-made dolls
- 2003 Finalist at the Brett Keble Awards for the Keiskamma Tapestry
- 2003 The Keiskamma Tapestry at Grahamstown festival, exhibited as part of Eastern Cape Arts and Culture**
- 2004 The Keiskamma Tapestry on permanent show at the Houses of Parliament in Cape Town**
- 2004 F.N.B Craft Now Exhibition: overall Gold Price
- 2005 The Keiskamma Altar piece created for Grahamstown National Arts Festival**
- 2005 The Keiskamma Altar piece at Constitutional Hill in Johannesburg
- 2006 Game Auction Exhibition

- 2006 The Cream Tapestry in East London Museum
- 2006 The Keiskamma Altar piece and Icons at University of the Witwatersrand, Johannesburg.**
- 2006-08 The Keiskamma Altar piece is touring Canada and the United-States
- 2006 Tapestries about Johannesburg and Icons on show at Everard Read Gallery, Johannesburg
- 2007 Grahamstown National Arts Festival with Creation Altarpiece**
- 2007 First felt piece at the Fibreworks *Ten Exhibition* in Cape Town
- 2007 Embroidered patterns from Pakamani on exhibition in Barcelona, Spain
- 2007 The Creation Altar piece and Bird friezes on show at Everard Read Gallery, Johannesburg
- 2008 Take me also for your child Altar piece on permanent show at the Nelson Mandela Metropolitan Art Museum, Port Elizabeth**
- 2008 Saint George Cathedral in Cape Town with the Creation Altarpiece and Felt Tree Panels
- 2008 The Creation Altar piece and Felt work in the SASOL hall in Johannesburg
- 2008 The Keiskamma Altar piece in Southward Cathedral in London, United Kingdom
- 2008 Brazil through the Department of Arts and Culture
- 2008-09 Set of 26 double-sided tapestries for Murray and Roberts
- 2009 Keiskamma Altar piece in Make Art/Stop AIDS exhibition starting on the 25th of February in Durban, co-curated by David Gere and Carol Brown
- 2009 Confection of the Trophies for BASA competition 2009

CASE STUDY 17: THE VISUAL ARTS AND THE RECOVERY OF HISTORICAL MEMORY

The Egazini Outreach project, Grahamstown (Eastern Cape)

Project Goals and Objectives

- To develop and create products based on visualisation for community-base income generating purposes
- To interpret the research primarily through the visual art as core, and later through other cultural industries

The Egazini Outreach Project is a community arts, culture and heritage initiative. It focuses on the concepts of reconciliation, education, job creation and community tourism development through incorporating history into cultural industries.

The Project is situated in Joza Township, in Grahamstown. Housed, ironically, in the former police Internal Stability Unit headquarters, it has become one of Grahamstown's primary tourist attractions.

The combination of history and art has had the unusual spin-off of stimulating economic development. The model is a unique one in which Rhodes University History lecturer Associate Professor Julia Wells and Fine Arts lecturer Professor Dominic Thorburn have played a pivotal role. The Project had its beginnings in 2000, when Prof Thorburn and the Rhodes University Fine Line press initiated a project entitled 'Egazini - the Battle of Grahamstown, Recasting History through Printmaking'. The project used the Battle of Grahamstown in 1819 - a pivotal event in the history of the small city - to re-examine and re-interpret that critical moment which formed the turning point of African-European relations, says Prof Wells, who was an active participant in the project as historical consultant. The immediate goal of the initiative was to expose nearly 30 local artists to the history of the Battle of Grahamstown and then let each produce his or her own interpretation, using printmaking techniques. These were then collected into a major art exhibition at the July 2000 National Festival of the Arts in Grahamstown.

Firstly, aspiring artists from two groups in the black community received training in the technical skills of making linocut prints. The art side of this project was co-ordinated by Rhodes Fine Arts MA graduate Giselle Baillie. The artworks for the exhibition were printed at the Fine Line Press and Print Research Unit attached to the Graphic Art Section of the Rhodes University Fine Art Department. A second initiative of the project, under the guidance of Prof Wells, involved identifying and giving special training as Project Historians to four young men from the local townships who had expressed a keen interest in history and its creative utilisation. They were charged with the task of working towards constructing a new sense of history from an African point of view.

Collectively, all participants were urged to think critically and creatively about what was already known, in order to come up with fresh, new and more meaningful interpretations. Within two months, the art exhibition opened, generating immediate interest and acclaim. It received several highly positive reviews in the media during the Arts Festival, as well as invitations to travel to London, Madrid and Iceland. A copy of the exhibition was subsequently purchased by the National Art Gallery in Cape Town. The original exhibition is now on display at the Egazini Outreach Project centre.

"The collective efforts of the project participants contained within them vital elements of a new sense of identity which was a far cry from the old white settler triumphalism and the Xhosa anger at the cruelties of conquest and defeat. Out of the painful past comes not only hope, but the beginning of reconciliation and finding a common meeting ground." says Prof Wells.

This triumph has now evolved into the Egazini Outreach Project, a lasting initiative with positive economic development spin-offs. The community historians started taking influential groups of local leaders on tours which included their own narrative of the events, visits to the sites and to the art exhibition. These excursions were soon extended to visiting international tours and study groups.

The Project obtained from the Municipality the use of the abandoned police station in Joza Township for its artists to use as a work area, with printing presses funded by the then Western District Council (now Cacadu Municipality). As funding for conventional academic research became available, the Project Historians undertook extensive oral history work among the descendants of the amaNdlambe people and new archival sources were unearthed by Prof Wells. The fresh information in turn fed into two subsequent art exhibitions, one on the character of Makana (National Arts Festival 2001) and the other on his dramatic escape from Robben Island (National Arts Festival 2002). In 2007 the UNISA Press is publishing a small book about Makana's escape from Robben Island, using text and images from the Egazini artists and Prof. Wells.

In late 2002, the Project began running community workshops, using large banners of selected art images as visual aids. These go beyond the history of the battle, to stress African values, pride and self-sufficiency, says Prof Wells. Funded by the South African Heritage Resources Agency, the workshops were held at the Great Places of nearly all the amaNdlambe chiefs, as well as with a variety of audiences in the Makana and Ndlambe Municipalities.

In 2002, the Egazini Outreach Project participated in teaching the Robben Island Museum Spring School at Robben Island and it received a poverty alleviation grant from the Department of Environmental Affairs and Tourism to upgrade its building and give project members management skills. In 2003, the Project hosted a year long learnership, Project Development for Heritage Tourism, giving training based on its own developmental model to learners from throughout the Eastern Cape.

A one-roomed interpretation centre, funded by the South African Heritage Resources Agency, has been set up at the Project's Joza facility, giving the local community easier access to specialized information about the Battle of Grahamstown. It was officially opened at the 2005 Makana Freedom Festival by King M Sandile of the amaRharabe nation and P Buthelezi, the CEO of the South African Heritage Resources Agency. The multi-faceted nature of the Egazini Outreach Project and the way it developed, provided a "richness of meanings" which were translated into tourism products, including tours, cards, calendars, t-shirts, art prints and craft products, says Prof Wells.

"The combination of the physical power of the landscape, the chorus of artists' voices in both words and images and the enthusiastic constructions of the meanings of the past for the present by the Project Historians all add up to a potent and authentic message. The very complexity of the process through which the meanings have been constructed offers a sense of community ownership which is rare in the cultural tourism sphere."

Over the years, the Egazini Outreach Project has partnered with numerous Rhodes University student projects and research initiatives. Taking the tour and visiting the Egazini Centre became a part of Journalism 1's annual orientation programme. The Egazini artists made a unique contribution to the Rhodes University Centenary artworks made by Gavin Young for the University's Drostdy lawns.

Since its inception, the Egazini Outreach Project has become one of the few sustainable community art projects in the country. Its artists exhibit regularly both solo and collectively at the National Arts Festival and they have participated in a number of international collaborations.

Programmes

All programmes/projects implemented through Egazini Outreach Project fundamentally concerned around the notion of both disseminating broader understanding of heritage for reconciliation and education purposes, as well as for the transferral of appropriate skills in order to capacitate communities for actively involve themselves in taking ownership of their knowledge.

Egazini, The Battle of Grahamstown: The Battle of Grahamstown in 1819 is often referred to as a critical turning point in South Africa's history. On April 22 that year, Makana, a Xhosa prophet under Chief Ndlambe, led an attack on the British garrison in Grahamstown, resulting in heavy losses for the amaXhosa. Within a few months of this battle, a combined force of Dutch colonists and British military expelled all the amaXhosa beyond the Keiskamma River. Rather than see his people decimated any further; Makana surrendered himself to Landdrost Andries Stockenstrom. The British sent Makana to Robben Island as a prisoner, where he drowned while attempting to escape on Christmas Day 1819.

Focusing on heritage and legacy, and working with the Fine Line Press and the Underpressure Agency, in collaboration with members of the History Department of Rhodes University, a selection of visual artists has produced a diverse collection of graphic works for this show. Participants were drawn from a wide arena including academic institutions, community centres, schools, research and archival deposits, museums, government departments, private enterprise, professional artists organisations and a women's craft group. Artists include Giselle Baillie, Violet Booï, Gabriel Clark-Brown, Christine Dixie, Roxandra Dardagan, Hilary Graham, Jacobus Kloppers, Vusi Khumalo, Nigel Mullins, Rosie Ngxingo, Dominic Thorburn and Zola Toyi.

Appendix F: Art Museums and Collections Study

PREPARED BY CAROL BROWN AND ASSOCIATES

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Key Findings

Funding

The museums sector – including both public and private institutions – perceives its future in corporate and self-generated funding rather than in government and public-sector funding.

Acquisitions

It is clear that public museums are not able to acquire new artworks at anything near the rate or volume at which corporate collection and private institutions are currently doing. Corporate collections are therefore responsible for the majority of new acquisitions of artwork in the country. Nonetheless, it is important to note that – despite this differential – public museums have continued to acquire new works for their collections, in large part due to both financial support and direct donations of artworks from private individuals.

Collections and Physical Infrastructure

Both public and private institutions have been able to maintain the physical integrity both of their permanent collections and – to a marginally lesser extent – of their physical premises. This contrasts strongly with tendencies in neighbouring countries, and can be counted as a significant signifier of these institutions' continuing viability.

Exhibitions

Public museums organise and display significantly more temporary exhibitions than private collections; most of these museums also report producing exhibitions that travel between institutions. This strongly suggests that the sharing of resources between museums has played a significant role in allowing them to continue to show a wide range of exhibitions.

Audience Development

Public museums have been notably successful at attracting large – and reportedly diverse – audiences through public events, school tours, and education and outreach programmes. Most respondents report that this success is ongoing – as visitors numbers continue to increase; most, however, also believe that their audiences can still be further developed.

Outreach

Education and community outreach programmes are currently under-resourced in both public and private institutions; a large number of surveyed institutions also emphasise the necessity of redressing this under-resourcing to enable continuing audience development.

Overview of Methodology

Initial Phase:

The initial phase of the project involved updating and supplementing the existing database of public and private museums and collections in South Africa. This revised database then provided the basis on which institutions were invited to participate in the broader survey.

The Survey:

A lengthy survey was prepared, consisting of 84 questions organised into seven sections. These covered institutional arrangements, audiences, exhibition practices, collections management, staffing issues, financial arrangements, and strategic challenges faced.

A wide range of possible response-types were included in the final survey, including yes/no questions, the choice of percentage-ranges, numerical responses, and textual responses.

The survey could be completed in several ways. First, respondents could enter a website address and complete the survey electronically. Second, a pdf version of the survey was sent to all participants, with the intention that it could be printed and manually completed before being returned by fax. Finally, participants were either telephoned or – when possible – visited, and the survey discussed and completed in collaboration with an interviewer.

The Interviews:

A number of supplementary interviews were conducted telephonically, in person, and over email correspondence. These were in part used to elicit informal responses from reluctant participants. More commonly, however, these interviews were used to elicit informal commentary and discussion which – while impossible to quantify – were then used to aid in the interpretation of the more formal responses garnered from the completed survey forms.

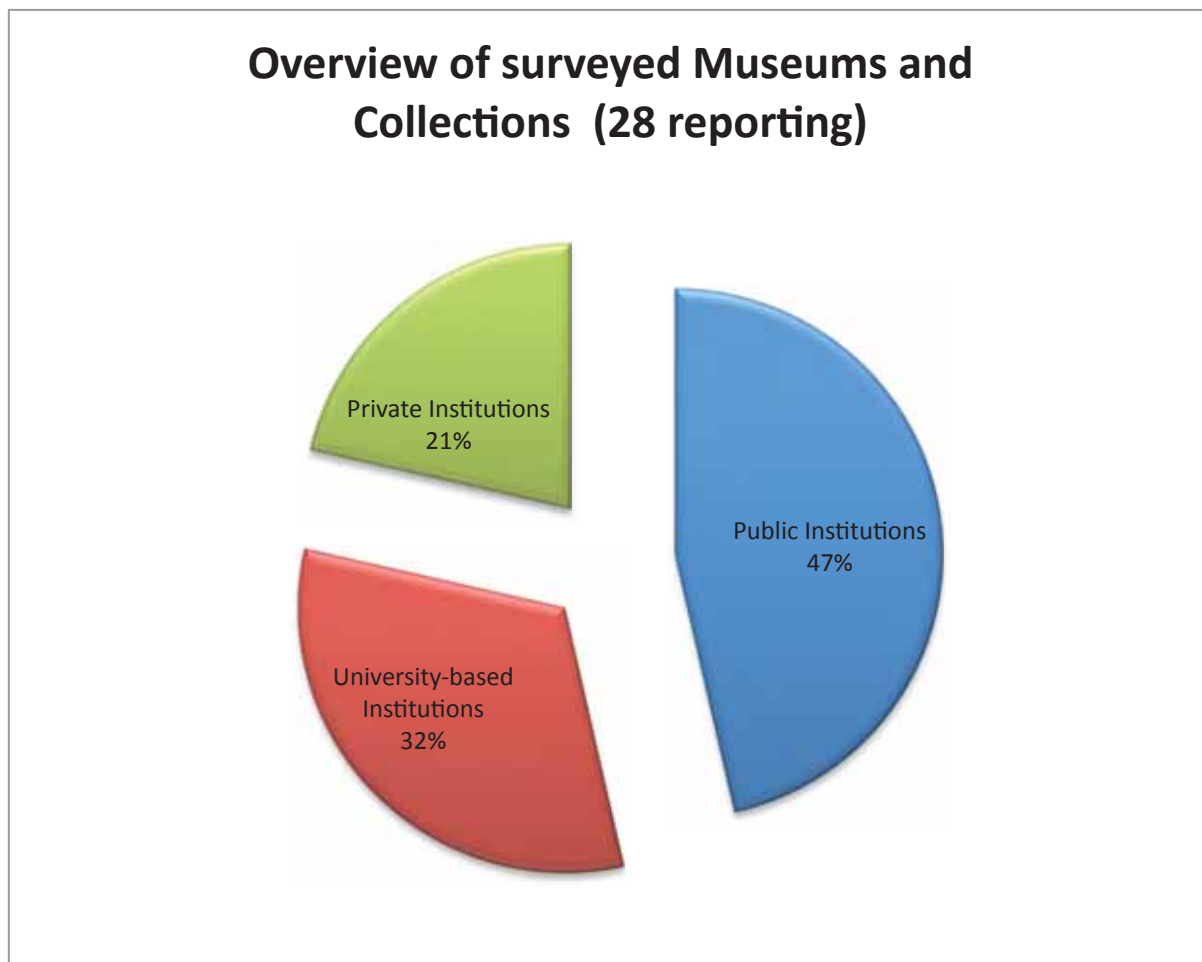
The Participants:

Approximately 40 institutions were invited to participate in the survey. Of these, a total of 21 institutions fully or partially completed the survey. This resulted in over 50% of the solicited participants responding and completing the survey.

The responding institutions included nine municipal or national government institutions, six university-based institutions, four corporate collections, and two independent collections. Of these, eleven institutions self-identified as public and ten as private.

1. Institutional Framework

1.1 Public and private museums and collections



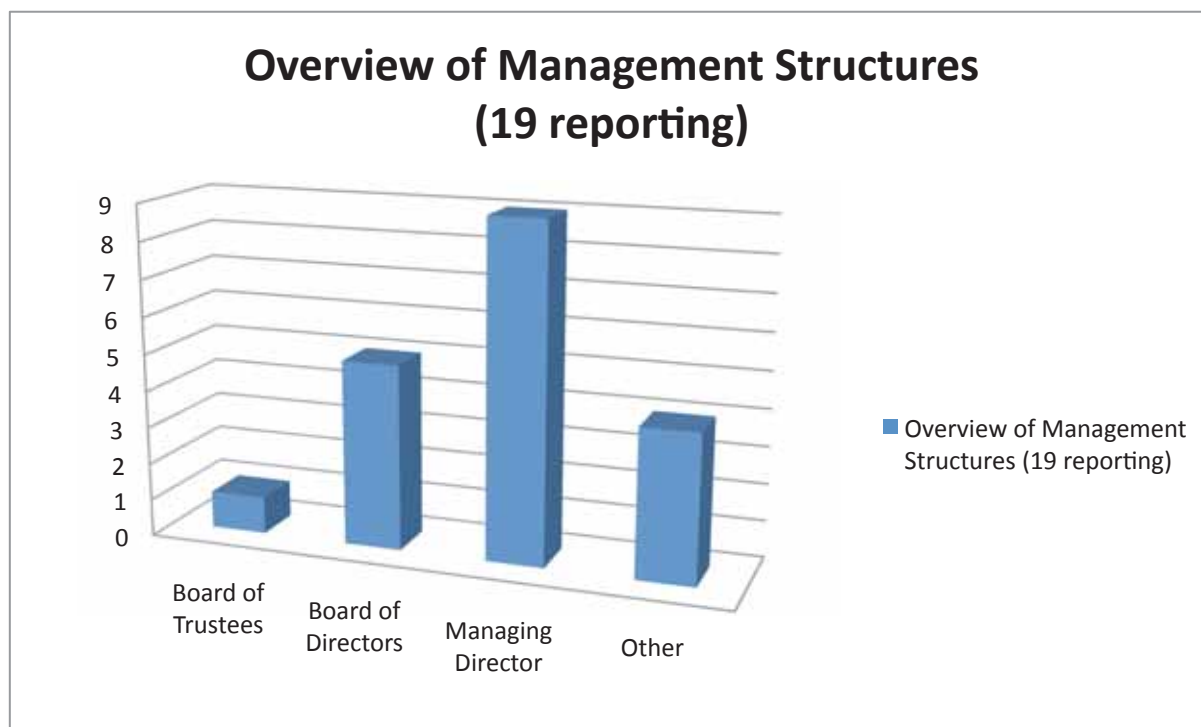
Of the 28 respondents, approximately 47% (13 institutions) identified themselves as ‘public’ organisations. A further 32% (8 institutions) identified themselves as being based in a university, while the remaining 21% (6 institutions) could be identified as ‘private.’

Of the public museums, 8 (61%) were identified as being run as Local Government or Municipal institutions. The remaining 5 (39%) were identified as being run by the National Government. No respondents identified themselves as run by Provincial Government.

Of the private museums and collections, 4 (66%) described themselves as being administered as ‘corporate sub-divisions.’ Only 1 described itself as a charitable trust, while the remaining respondent described itself as a Section 21 type non-profit organisation.

The remaining respondents indicated that they were run as university departments.

1.2 Management Structures

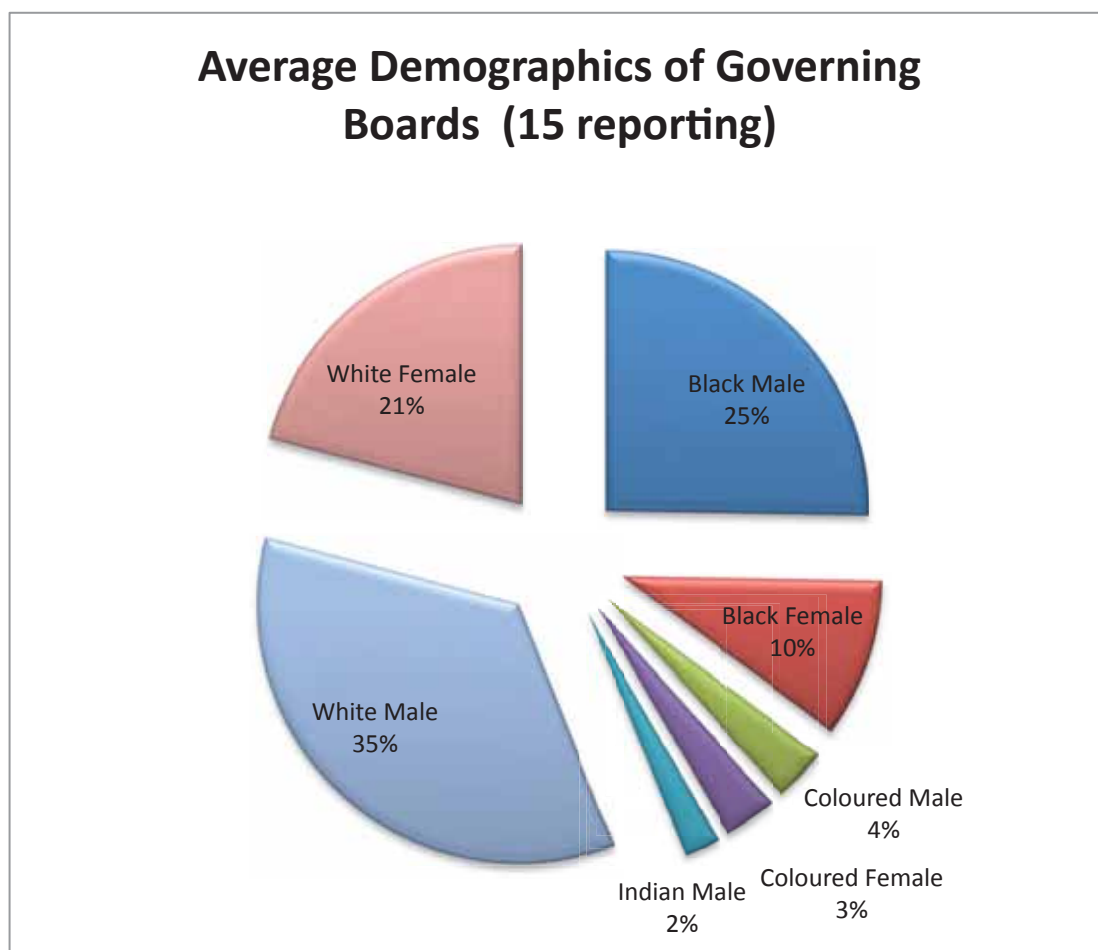


The most common form of management structure amongst all surveyed institutions was a single Managing Director/Curator. Approximately 47% of all respondents reported being administered by such a Director. The second most common management structure was a Board of Directors, possessed by 26% of the respondents. (Only one of the respondents reported having both a Managing Director and a governing Board of Directors.)

The presence of a Board of Directors was notably more common amongst public museums and collections than amongst private ones, with approximately a third of these respondents reporting such a structure. Only one private institution reported the presence of a Board of Directors, while a second such institution reported being governed by a Board of Trustees rather than of Directors. (This same institution is run as a Section 21 company, which may explain this discrepancy.)

NOTE: Several corporate collections chose either not to answer this question, or to indicate that – despite the option of identifying a ‘corporate divisional head’ – they could not describe their particular management structure. This may also explain the large number of responses indicating that an ‘Other’ alternative was needed; in telephone interviews it became clear that this was often a response to the particularities of bureaucratic structures within institutions and that a senior Curator was often not identified as Managing Director.

1.3 The Demographics of governing Boards



Of those respondents reporting the presence of a Board of Directors or Trustees, 75% indicated that this Board met quarterly. Just under 19% indicated that their Board met monthly; while the remaining 6% indicated that their Board met every two months.

The largest such Board consisted on 17 members, and the smallest of 3 members. The vast majority of the respondents – 90% – indicated that their Boards included one or more Black males; fifty percent of the respondents also included one or more Black females on their Board. In minor contrast, 90% of the respondents indicated that their Boards included White females while only 70% included one or more White males as members of these boards.

By contrast, only 20% of the respondents had either Coloured males or females represented on their Boards and only 10% of the respondents had Indian or Asian Board members.

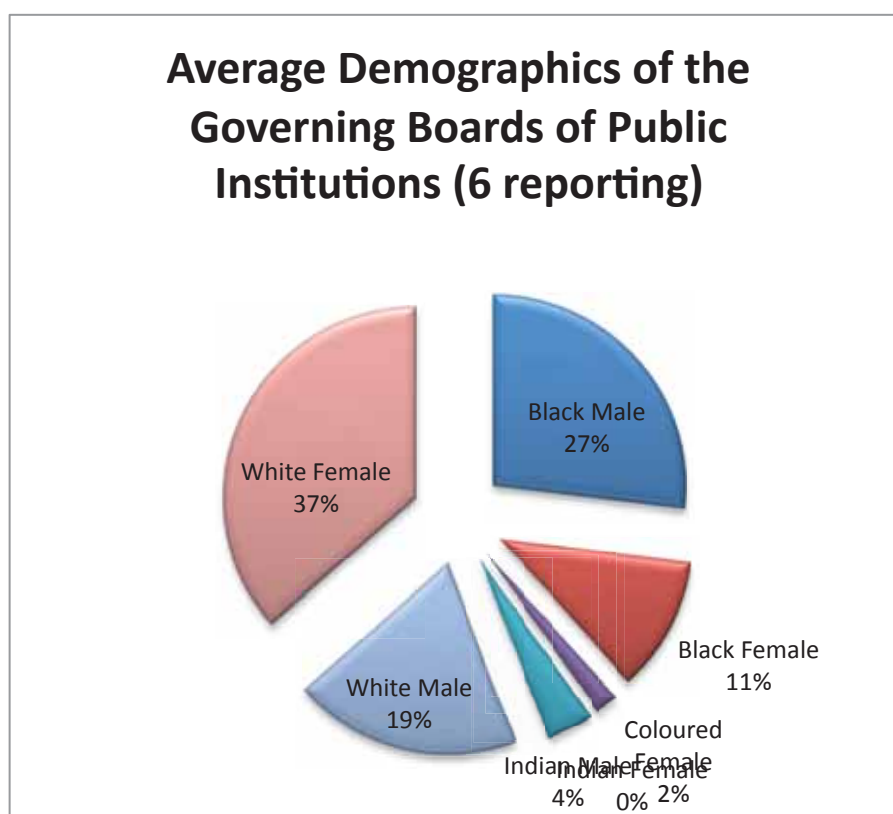
However, as the chart above demonstrates the relative prevalence of Black board members does not translate into absolute numbers: in the majority of Boards surveyed, Black members occupied minority positions in numerical terms.

1.3.1 The Demographics of governing Boards (Charts)

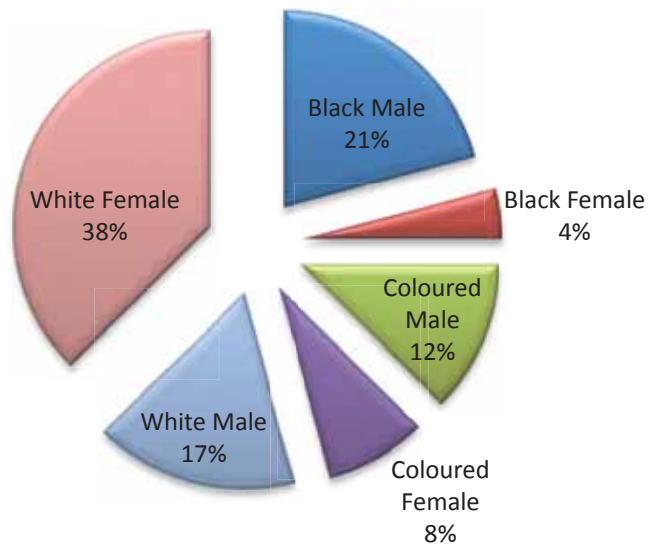
When broken down into public, university-based, and private institutions then demographic picture is refined. The following charts suggest that certain groups – notably, White women, Black men, and White men – are consistently represented across public, university-based, and private institutions; other groups – notably Indian and Coloured men and women – are irregularly represented. Black women are systematically under-represented in these demographic reports, however, whether by comparison to Black men or White women.

Private institutions, notably, were least likely to have representation from minority groups on their governing boards.

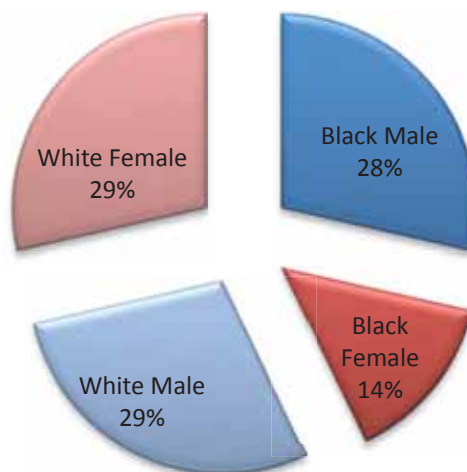
Public institutions reported the largest boards, by number of members. The membership of these boards thus represents the majority of participants in this sector of arts management.



Average Demographics of the Governing Boards of University-based institutions (5 reporting)



Average Demographics of the Governing Boards of Private Institutions (4 reporting)



2. Staffing

NOTE: Approximately 80% of the survey's respondents provided detailed responses to questions about staffing. The small number of non-responses came mostly from the private sector and may represent either the complexity of discussing staff allocation within a large corporate (or university) environment or – notably in the case of corporate collections – a greater level of confidentiality and non-disclosure than in the public sector.

The breakdown of responses is as follows: out of 13 public institutions, 10 institutions responded; out of the 8 university-based institution, 7 responded; and out of 6 private institutions, 4 responded.

Staffing numbers (21 reporting)

	Senior Management	Middle Management	Specialist/ Technical	Ancillary/ Support	TOTAL
Public Institutions	6	13	18	60	97
University-based Institutions	9	9	5	22	45
Private Institutions	3	3	1	11	18
Total	18	25	24	93	160

2.1 Staffing numbers

Senior Management: A third (33%) of the respondents to this section of survey indicated that they employed one or more people in senior management roles. The majority of these – 66% - employed only one person in such a role; of the remaining third, 22% indicated that they employed 2 people in senior management roles and 11% indicated that they employed three such people.

NOTE: A significant proportion of the respondents – approximately 66% of the total number of respondents to this section - either left this section of the survey blank, or explicitly stated that their institutions did not employ any senior managers. In telephone interviews it became clear that some respondents were uncertain of how their particular management structures compared with other institutions' structures, and thus often chose to downgrade their manager's particular responsibilities to 'specialist middle management.' Others indicated that their bureaucratic human resources structures – whether public or private – did not place their divisional management at a senior level within the entire, broader institution. The absence of these responses should not be taken to indicate, therefore, that these institutions are without responsible senior management.

Specialist Middle Management: Two-thirds (66%) of the respondents indicated that they employed one or more people in specialist middle management positions. Of these, 66% employed only one person in this role, while the remaining 33% employed two such people. None employed more than two.

(For potential complications in this category, see the note directly above.)

Specialist Technical: Half of the respondents reported employing people in specialist technical positions – ranging from education officers to conservators and curators. Approximately 55% of

these respondents employ only one person in such a position; 22% employ 2 people; and a further 22% employ either 3 or 4 people in these positions.

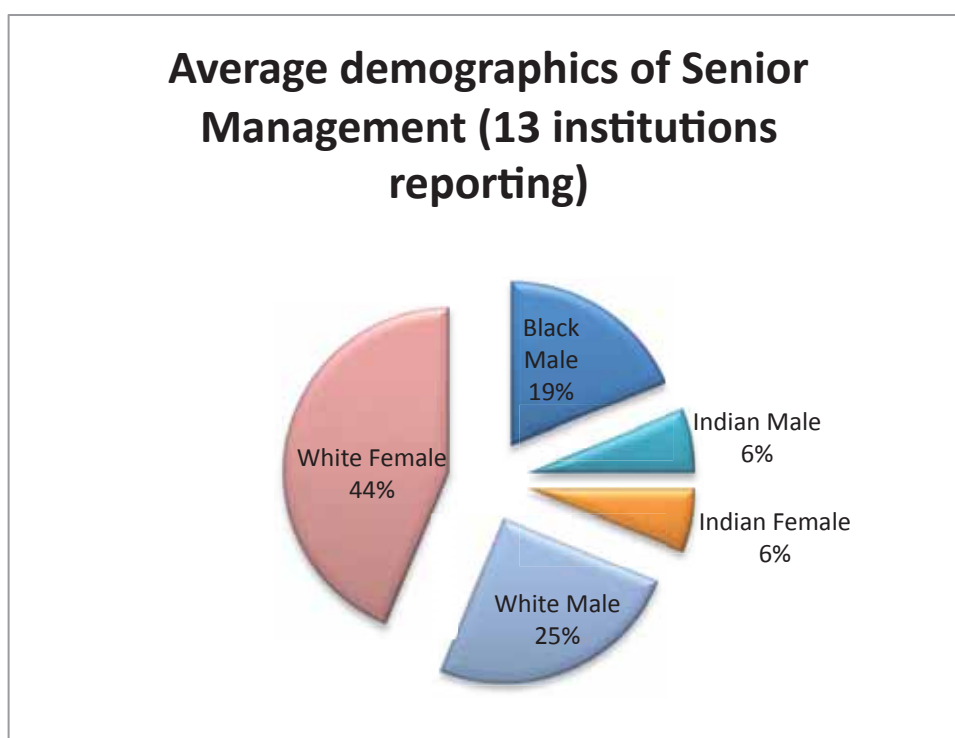
It must be noted, however, that half of the respondents to this section of the survey indicate that they do not employ any specialist technical staff – which may have an impact on their ability to maintain and present their collections, as noted in later sections of this report.

Ancillary and Support: Almost 80% of respondents indicated that they employed between 1 and 10 people in ancillary and support staff positions. Of these respondents, just over a fifth – 22% - indicated that they employ only one person in such a position; 28% currently employ 2 people in these positions. The number of support staff in each institution is then evenly spread between 3 and 10 people, with no institutions having more than 10 support staff.

2.2 Staffing Demographics

Amongst the original group of surveys, the majority of institutions provided information about staff demographics. In the second group of abbreviated surveys (see Research Note), however, this information was not solicited. The following sections are thus based on responses from between half and two-thirds of the total sample and should be treated with appropriate caution. Informal discussions and interviews, however, suggested that the patterns indicated in this analysis of the partial responses may be more generally assumed.

2.2.1 Senior Management

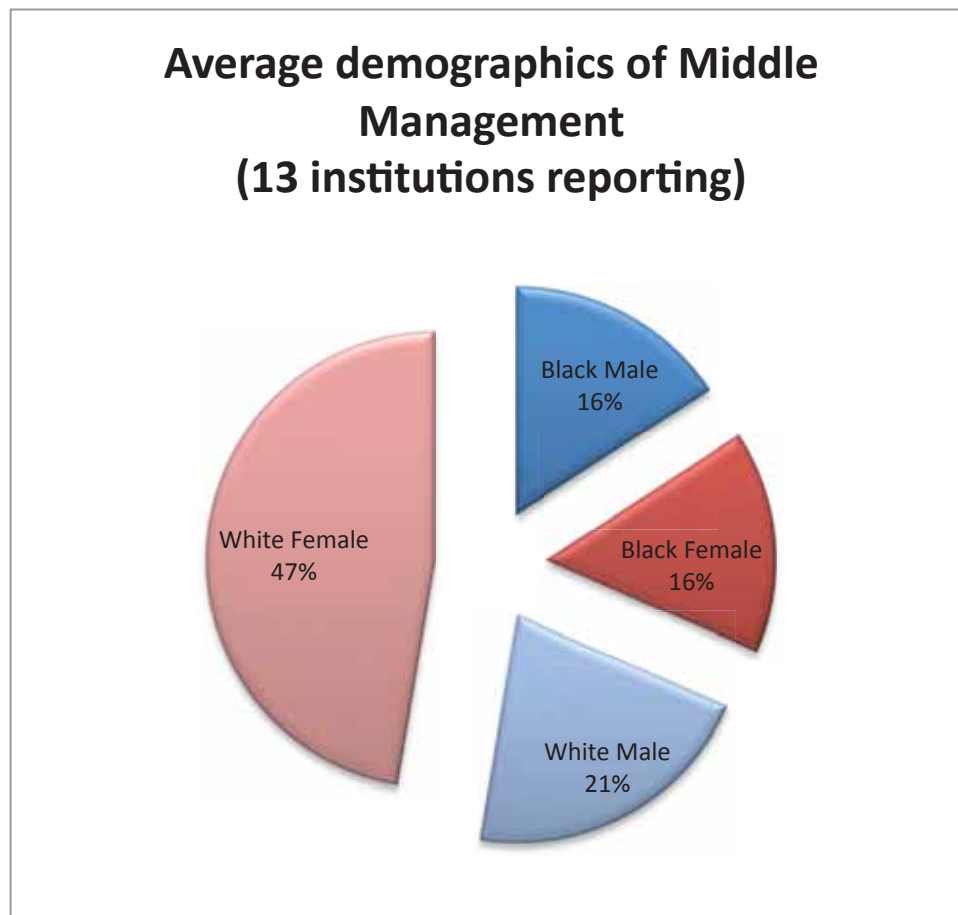


Senior Management: A fifth (19%) of the institutions reporting the presence of senior management positions have filled these positions with Black, male candidates. One institution is managed by an Indian female, and one by an Indian male. The remainder of the institutions – approximately three

quarters of the respondents – are managed by white males and females. Making allowance for the presence of more than one senior management figure in certain institutions, there are double the number of white females than white males in these positions. No respondents report having any Coloured senior managers. Nor do any respondents report employing any Black females in these senior management positions.

All but one of the senior managers are reported to be over 35 years old.

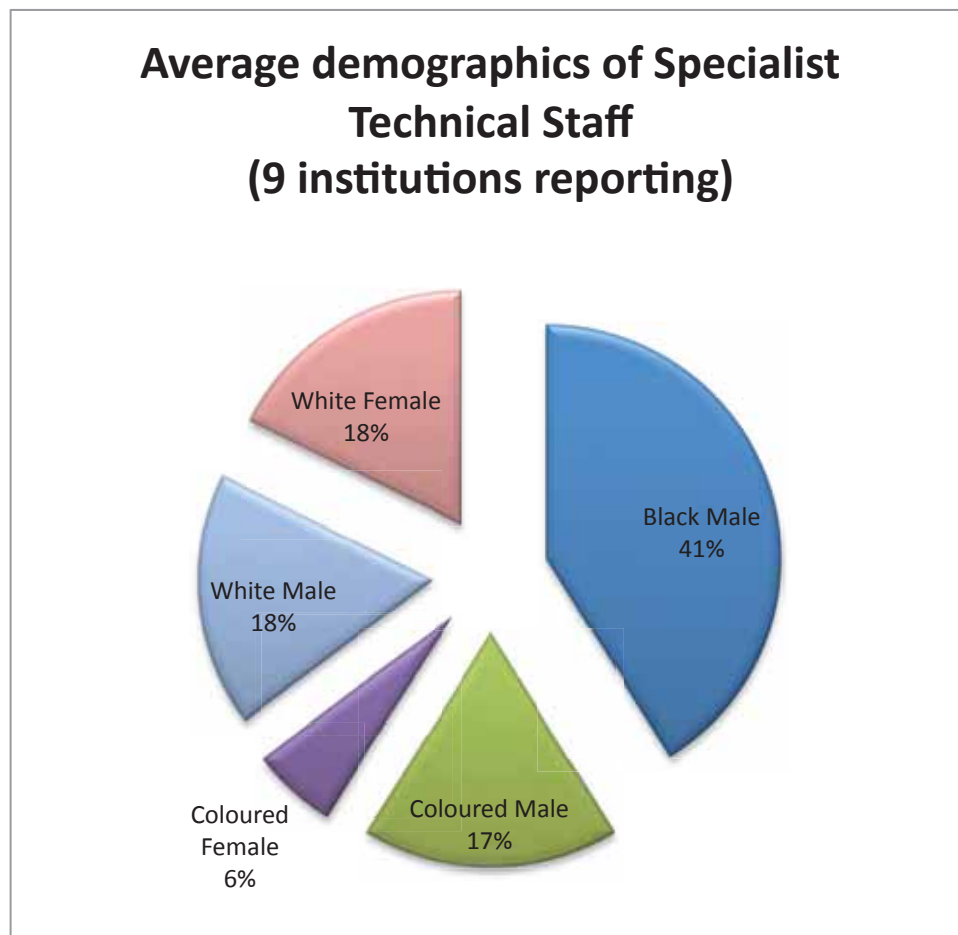
2.2.2 Middle Management



Middle Management: Just under a third (32%) of respondents report employing Black males and females in middle management positions. However, the remainder of the respondents – 68% of the sample – report employing only White males and females in these middle management positions. No institutions reported employing either Indian or Coloured men or women in these positions. Only one institution reported employing both White and Black middle managers. This clearly suggests that – even more than in senior management positions – middle management is still demographically White.

All those institutions reporting an entirely White middle management also report that these positions are filled by candidates older than 35 years; however, all the reported Black middle managers are younger than 35.

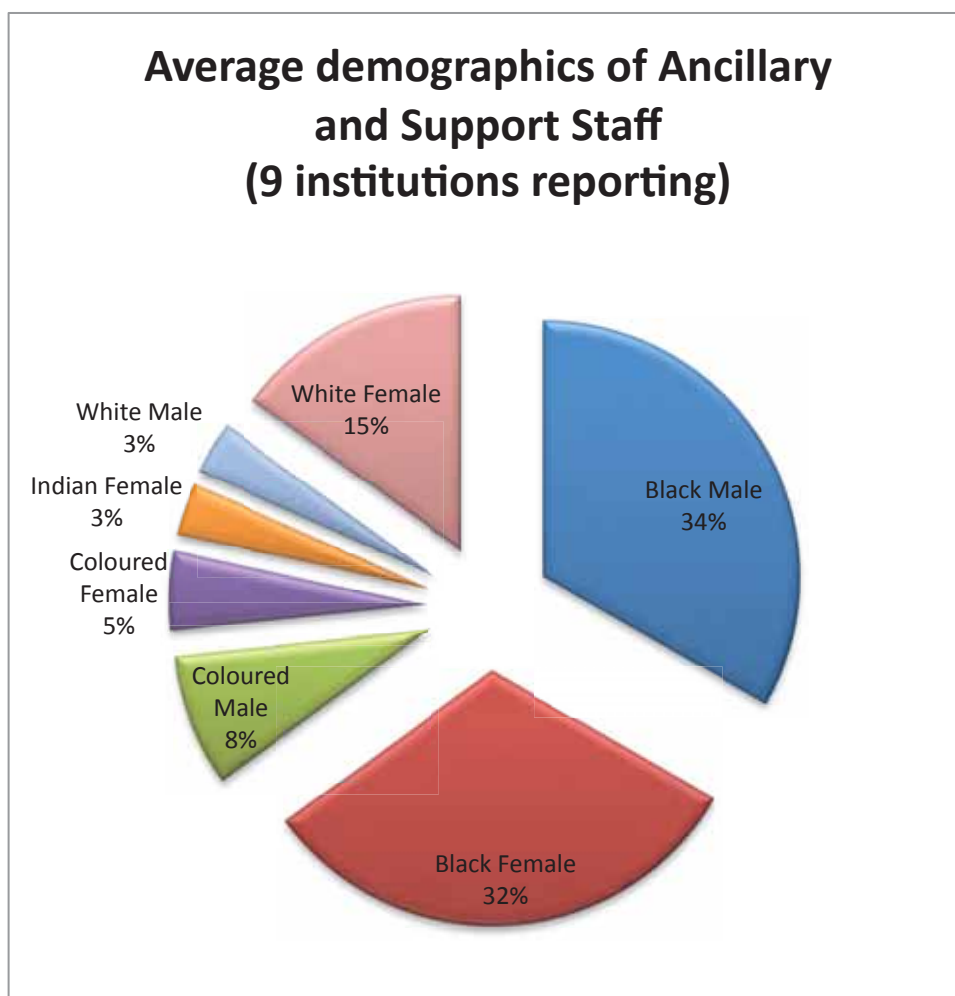
2.2.3 Specialist Technical



Specialist Technical: In contrast, the single largest group (41%) of the specialist technical positions are filled by Black males. No Black females were employed in these positions at any of the reporting institutions. Coloured males and females filled technical positions at 23% of the responding institutions; two-thirds of these positions were filled by Coloured males. 55% of the respondents also employed White technical staff – split equally between male and female; only 33% of the overall sample only employed White technical staff.

In contrast to senior and middle management, a slim majority of these institutions' specialist technical staff (approx. 55%) are younger than 35.

2.2.4 Ancillary and Support



Ancillary and Support: Approximately 76% of the responding institutions employ one or more Black males in ancillary positions. 60% of these institutions also employ Black females in these positions. A further 15% of the overall responding institutions employ Black females, but not Black males, in ancillary positions. In total, then, just over 90% of all responding institutions employ Black ancillary and support staff – far more than the percentage that employ Black men and women in specialist or management positions.

It is worth noting that approximately 55% of surveyed institutions employ White men and women in ancillary positions – in all but one case in addition to Black employees. The clear majority of these positions are filled by White women, however, with only one White male reported as being employed in an ancillary position. Two of the surveyed institutions also employ Coloured men and women in these positions, with a Cape-based museum accounting for 6 of the 7 such Coloured employees. (The majority of these are male.)

Just over two-thirds of these positions are filled by men and women older than 35.

*

Education: Of the responding institutions, 75% reported employing one or more people with postgraduate qualifications. Of these, 42% only employed one such postgraduate, while 25% employed two and the remaining 33% employed three such postgraduates.

Half of the responding institutions indicated that they employed people with undergraduate university educations. Two thirds (66%) employed staff with a high-school or primary-school level qualification; almost all responding institutions – bar two – recorded employing people with no formal qualification.

2.3 Staff Benefits and Training

All but one of the responding institutions reported that they provided their staff with benefits over and above their salaries. (The one exception is a privately-run Section 21 collection, employing only one staff member.) The most common such benefits were medical aid packages (provided by 85% of respondents), pension/provident fund (provided by 77% of respondents) and unemployment insurance (also provided by 77% of respondents). There was no notable discrepancy between public and private institutions.

All respondents reported offering their staff access to some form of further training/education, whether in-house or external. Curatorial practice and conservation skills were the two most commonly reported forms of training offered: approximately 72% of the respondent offered both. Following this, approximately 58% of respondents also offered training in education and outreach skills to their staff. Approximately 40% also offered business and financial training skills. Although there was no major discrepancy between public and private institutions, it is perhaps notable that private institutions were somewhat more likely to offer a wider range of potential training programmes to their staff.

2.4 Volunteer Support

Less than half of the respondents reported either having a formal Friends Organisation or any alternate form of Volunteer Support. Here, there is a clear split between public and private institutions. Only one private institution has formal Friends Organisation, aimed primarily at disseminating information and fundraising rather than at providing volunteer support. Likewise, only one other private institution records having volunteer support without such an organisation; this institution is based at a university and makes use of student volunteer support – placing it in an ambiguous position regarding this work.

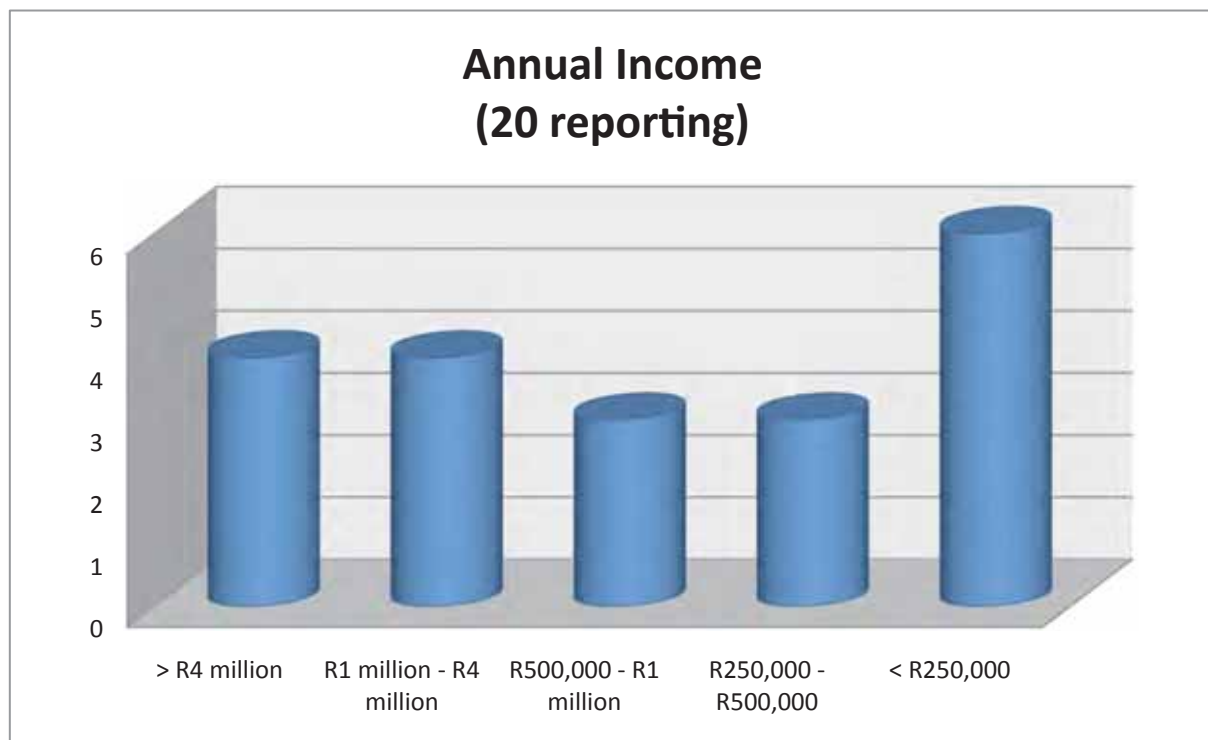
Of the public institutions responding to this question, however, three-quarters recorded having a formal Friends Organisation – although slightly less (approx. 62%) reported having volunteer support available. This suggests that these public organisations are far more proactive in organising both volunteer support and public membership programmes.

Amongst those institutions reporting the presence of volunteer support, these volunteers were almost evenly split between adult and student volunteers. Only one public institution reported using senior citizens as volunteers. This suggests a significant shift in the demographics of volunteer support for museum and collections, with a younger volunteer base suggesting the ability of these institutions to successfully engage with new audiences.

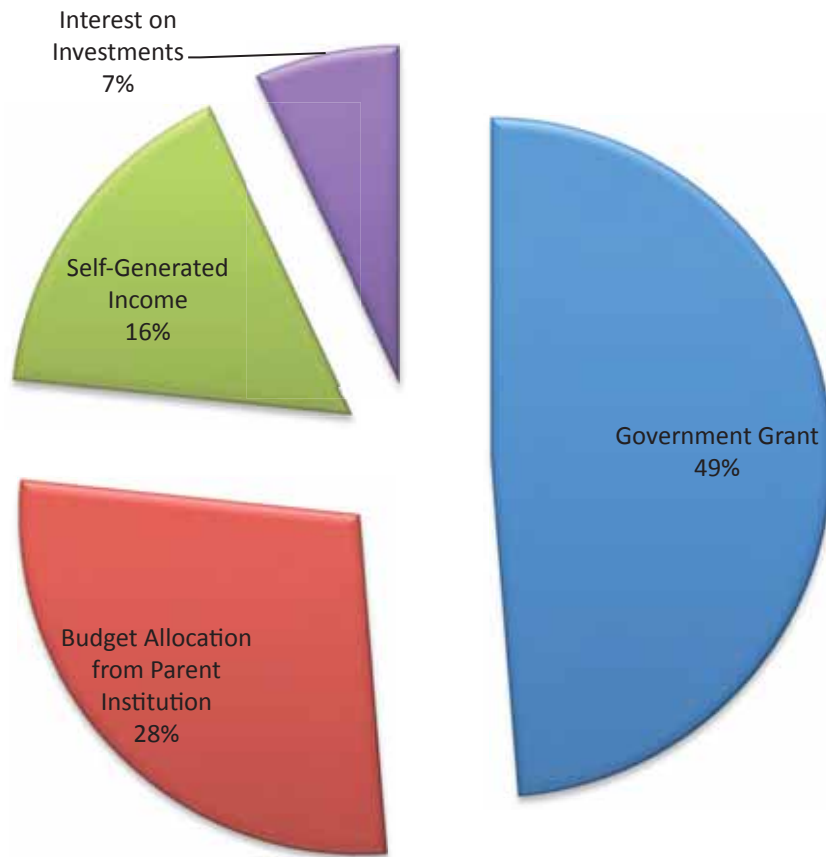
3. Finances

Note: Not all responding institutions were either able or willing to provide detailed financial information. Private institutions, in particular, were chary about revealing specific figures or breakdowns of income; it appears, however, that these institutions share at least one characteristic with university-based institutions (which were, in general, more willing to disclose financial data) – both derive the majority of their budgets from a central institutional allocation. Public institutions were significantly more likely to provide financial data; however – as is made clear in the section beneath – the nature of their income/expenditure can differ dramatically from institution to institution. Some public institutions receive a single grant, from which all expenses are allocated, while other public institutions receive targeted grants – and certain expenses, including notably salaries and building maintenance – are centrally and separately allocated by municipalities and other government institutions. This suggests that conclusions should be drawn with caution,

3.1 Income



Distribution of income sources (19 reporting)



Amongst public museums and collections, the reported figures for the most recent annual budgeted income varied wildly. All institutions reporting an annual income of over R4 million were public museums; nonetheless, several other public institutions reported incomes of well below R250,000 – including one which registered an income of no more than R25,000.00. Follow up interviews suggested that the large discrepancy was a result of different budgeting practices within their respective municipalities. The larger figures are generally inclusive of salaries and running costs; the smaller figure are not – in these cases, these significant costs were centrally administered by the municipality. (The following section – on expenditure – will address the proportion of these costs in general budgets.)

Other reporting public institutions received a six-figure annual income. Of these public institutions, approximately 70% reported that over 80% of this income came directly from government grants; only one institution earned the majority of its income off interest derived from investments. This figure is substantially higher than the overall income distribution figure, displayed above, confirming that government grants are central to the continuing existence of public institutions.

University based institutions indicated that the majority of their budgets were centrally allocated. Only two registered an income of between R1 million and R4 million; it is worth noting – in advance of the following section – that both pay staff salaries out of this budget. The remaining institutions reported budgets ranging across the two lower categories on the above chart; the lowest reported budget was R100,000.00 per annum, while the highest budget of the remaining institutions was R350,000.00 per annum. Neither of these institutions, however, were liable for building or salaries expenses, these being administered centrally within their larger parent institutions.

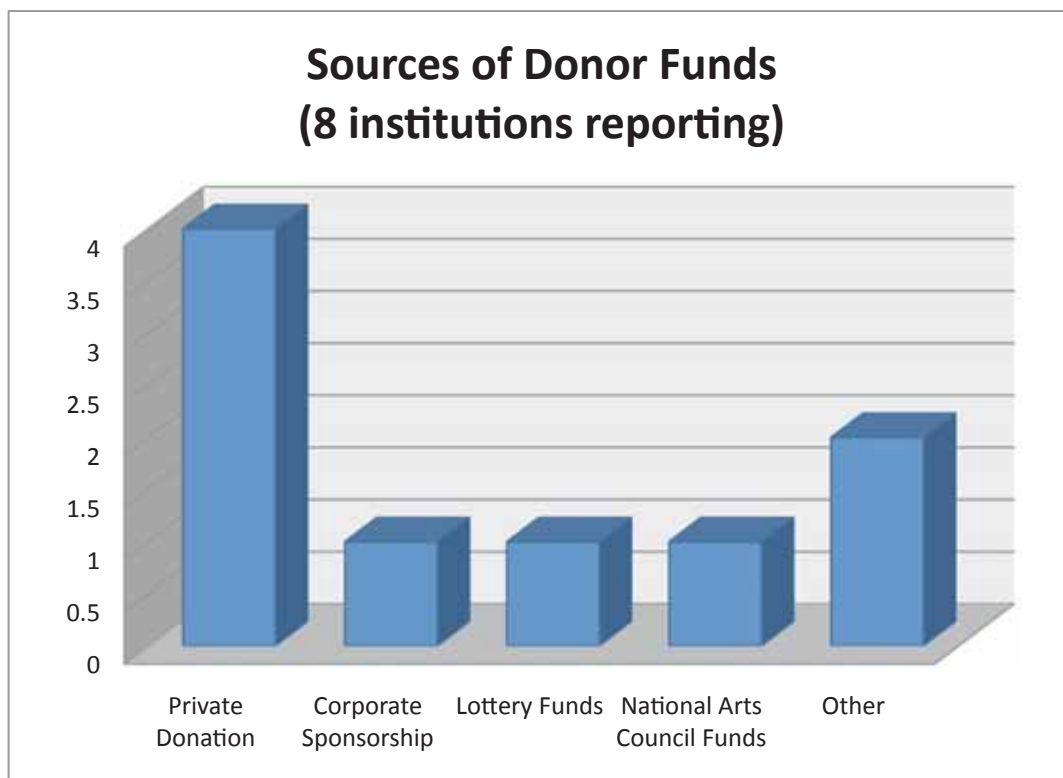
Only two private collections responded to this question, reporting budgets of R1 million and R600 000.00. One of these institutions reported deriving the majority of its income from a government grant: this institution is a section 21 company, and presumably receives the majority of its income from public sources; the other respondent derived the majority of its income from a central allocation. A lesser proportion was self-generated income.

It is worth noting that alternative sources of self-generated income – venue hire, catering, and shop sales – were of negligible to no importance in the public sector. Occasional venue hires provided a small source of income – well below 10% of the total income – to some public institutions. Interestingly, university-based institutions reported the most frequent occurrence of this form of income, with one institution deriving the majority of its budget from venue hire. During discussions, it was clear that for many public institutions the bureaucratic structures within which they operate make it extremely difficult to set up and maintain independent – and thus not centrally-regulated – income streams, such as museum shops and cafes. Universities appear to be more flexible than municipalities in this regard.

3.2 Supplementary Income (Donations)

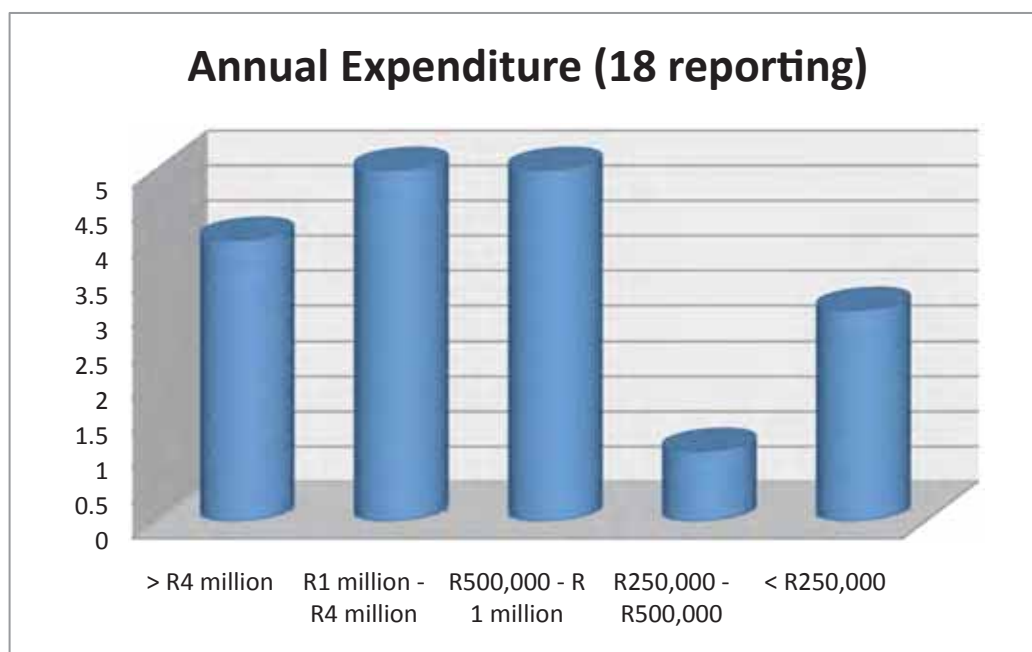
Note: Questions about the sources of donations were only asked in the first wave of the questionnaire; the second – abbreviated round – only asked whether any income was derived from donations. None of the respondents in this round indicated that this was case. Donor funding, in this instance, excludes the purchase of individual artworks and refers only to direct financial grants – which may or may not be hypothecated for specific uses.

A minority of respondents (8 out of the 20 reporting some form of financial information) thus indicated that donor funding had been received in the past year. The majority of the respondents (5 out of 8) were public institutions; only one university-based institution reported having received such funding. Both private institutions reported receiving donor funds. A small number of the institutions reported receiving funds from more than one source; most, however, received only one form of sponsorship. The following chart shows the most common sources of funding reported in the course of this survey.

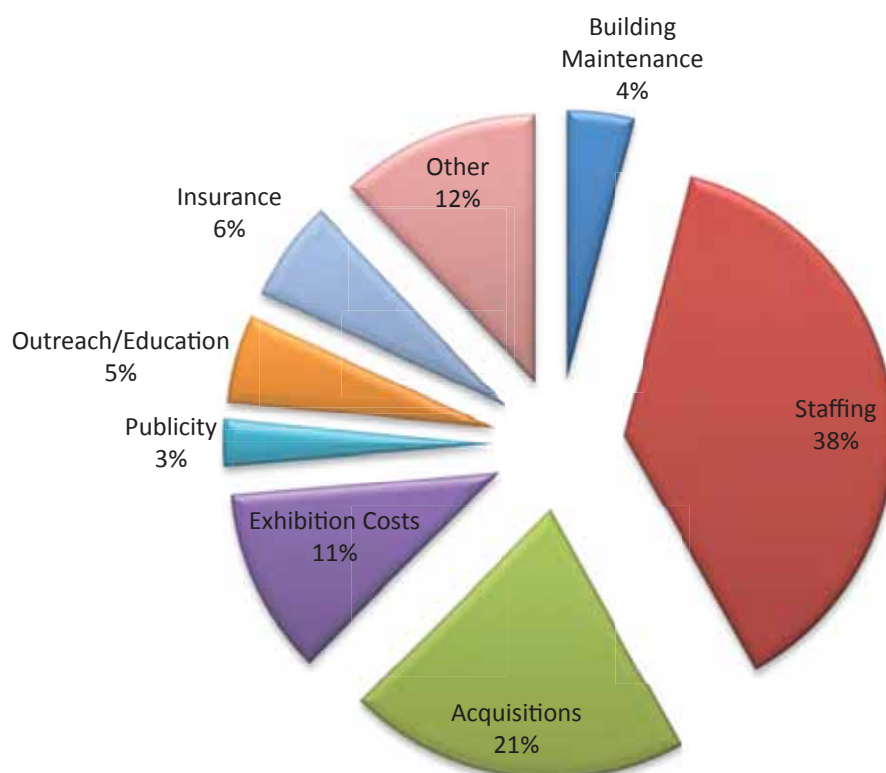


Approximately half of these donations came from private sponsors. Neither the National Lottery nor the National Arts Council played a significant role in funding institutions in the period covered by this survey. While this may be a consequence of bureaucratic troubles in both institutions, it is nonetheless a worrying finding – suggesting that the funds from these institutions are not reaching the museums sector.

3.3 Expenditure



Breakdown of Expenditure (18 reporting)



Amongst public museums and collections, reported levels of expenditure differed significantly – although in a pattern highly similar to that discerned for reported levels of income, noted above. This pattern illustrates the complexities of certain public bureaucratic accounting structures, and the difficulties faced by these institutions in accurately reporting income/expenditure patterns when parts of their budgets are centralised and others not.

In general, it appears that public institutions spend between 90% and 100% of their reported budgeted income, in so far as this is possible to determine. The single largest proportion of their budgets – as it was across all institutions – was dedicated to staffing costs, with over 60% of the respondents reporting that 45% or more (up to 80%) of their budgets were dedicated to staffing costs. Exhibition costs and acquisitions costs constituted the majority of the remaining budget categories; it is notable that acquisitions constituted a significantly larger proportion of the budget amongst those institutions which do not pay staffing costs out of their allocated budget.

This pattern – of higher acquisitions budgets amongst institutions without responsibility for staffing costs – is replicated amongst university-based institutions. In general, acquisitions budgets represent a relatively low sum of money – representing the highest proportion within the smallest budgets, and far smaller proportions within larger absolute budgets.

*

Costs associated with staffing were by far the most significant sources of expenditure, followed by costs associated with acquiring new artworks, and organising exhibitions. These were noted across all responding museums and collections, with no notable observable difference occurring between public and private institutions in these matters.

The minimal expenditure on education and outreach programmes by all institutions is particularly noteworthy. No public institution spent more than 10% of their total expenditure on these programmes; only two institutions reporting as private – a private museum and a university-based museum – reported spending more than 10% of their total expenditure on these programmes. This suggests that – across both public and private institutions – education and outreach programmes do not take up a significant proportion of these institutions’ annual expenditure. Similarly, expenditure on publicity is notably low.

3.4 Replacement Value of All Assets

Although the majority of respondents to this section of the survey were willing to answer this question, only one public institution was able to provide a specific figure. The remainder of the public institutions provided estimates ranging from seven to nine figures. The lowest response was R1.5 million – from a recently established municipal museum; this was an outlier, however, as the next lowest response was R15 million. Other estimates ranged from R100 million to ‘billions’. (It may be noted here that although respondents were able to provide detailed responses on the value of their collections – see Section 4 – few were able to more than speculate on the total value of assets associated with their museums.)

Private institutions, however, were able to provide more specific responses, although these were also all necessarily rounded-off estimates. These ranged from R1million – an outlier – to R33 million, R235 million and R500 million.

Only one respondent was willing to speculate on the value of any debts held by the institution, with most responding either that such debts did not exist or could not be reported. It is thus impossible to draw any conclusions on this particular question.

4. Collections Management

4.1 Size of Collection

	Number of Institutions reporting	Total Number of Artworks Reported	Average number of works in a Collection
Public Institutions	10	52,589	5,259
University-based Institutions	8	40,436	5,055
Private Institutions	6	7,180	1,197
Total	24	100,205	4,175

(This excludes one cultural museum, reporting 60,000 cultural objects – which would significantly skew the reported figures of all other museums. It is difficult to determine how many of these objects could be directly compared and contrasted to the works owned by other institutions. This museum is based in a university environment.)

The largest reported collections come from cultural and historical museums rather than those with an exclusively fine-arts focus. These are the only museums reporting five-figure collections, with two reporting collections of 16 000 and 18 000 objects, artworks, and artefacts. Amongst the exclusively fine-arts-based collections, the majority consisted of between 2 000 and 4 000 artworks, with a small number registering approximately 9 000 artworks. There is little significant discrepancy between the sizes of private and public collections, with a similar spread of reported results occurring in both categories.

4.2 Value of Collection

	Number of Institutions reporting	Total Value of Artworks Reported	Average value of works in a Collection
Public Institutions	7	R690,399,316	R98,628,474
University-based Institutions	7	R328,500,000	R46,928,571
Private Institutions	3	R131,900,000	R43,966,666
Total	17	R1,150,799,316	R67,694,077

The majority of the responding institutions (85%) have had their collections professionally valued. The remaining 15% include cultural museums, a university-based collection and a recently-established municipal museum. These appear to represent relatively unusual collections, either with a large number of individual cultural artefacts or too new to have established a collection sufficiently substantial enough to warrant professional valuation.

A small number of public institutions were either not able or not willing to disclose the total value of their collections. The remainder, however, were able to provide estimates of this figure. The largest and oldest of the responding institutions valued its permanent collection at R400 million for insurance purposes; several equivalent institutions could not respond to this question, leaving this as

an outlier, although one other did estimate its collection to be worth approximated R100 million. More recently established public museums estimated their collections to be valued at between R14 million and R72 million.

Most of the university-based institutions were willing to provide an estimate of the value of their collections. These ranged from R4.5 million to R100 million. Private institutions were less willing to disclose the total value of their collections; however, amongst those that did the largest – of R126 million – counted for the vast majority of the value reported.

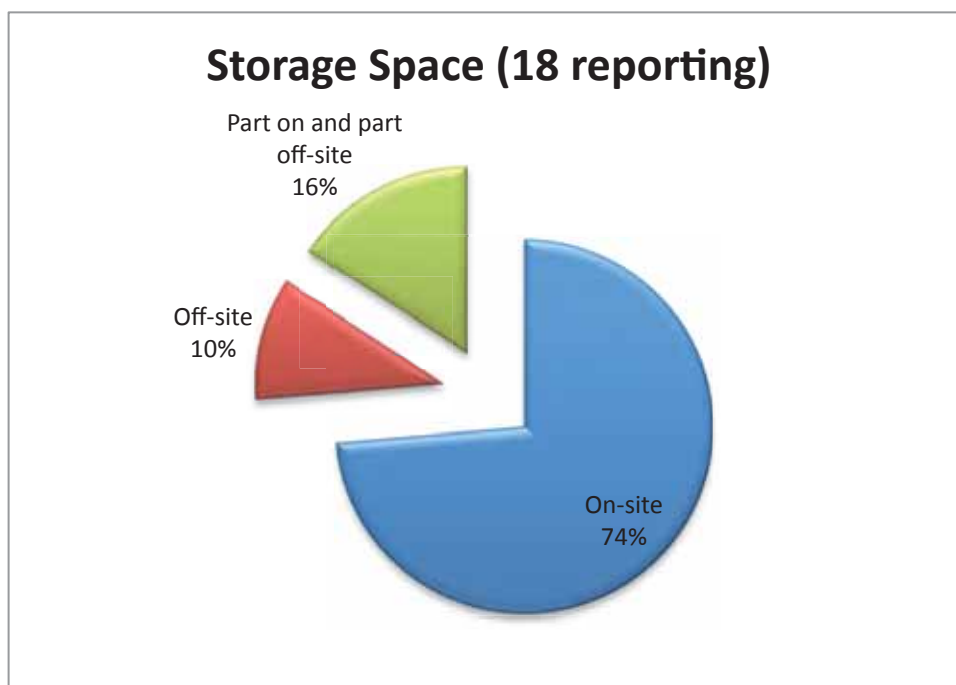
The value of private collections thus tend to be spread more evenly than those of public collections, and to be – in general – slightly lower than the highest reported figures for public collections. Given the relative age of these institutions – with some public collections reaching back into the nineteenth century, while few of the private collections are nearly so old – this is not necessarily surprising. (See the Section 5: Acquisitions for further notes.)

4.3 Collections Management

Storage Space:

The vast majority of the responding institutions reported having a space dedicated to the storage of their permanent collections. (The one dissenting respondent has its entire collection on permanent display.)

The majority of these respondents (74%) house this storage space on their own permanent premises, while only a minority have to house their collections on another site:



Cataloguing:

The majority of the respondents (84%) employ one or more people to manage, catalogue, and maintain the physical integrity of their collection. More than half of these respondents employ only one such staff member; a quarter employ two such dedicated staff members; and the remainder employ either three (12.5%) or four (6.25%) dedicated staff members.

A large number of institutions continue to maintain a physical catalogue – either a card catalogue or a log book – of their collections, although it should be noted that most of these institutions supplement this with a computer catalogue of some form. Noted brand-name computer cataloguing programmes – including Star and Microsoft Access – accounted for less than half of the responses. It appears that the majority of computer cataloguing is not done in dedicated programmes, therefore, but is most probably a computerised log book.

5. Acquisitions

5.1 Acquisitions Budgets

	Number of Institutions reporting	Reported total acquisitions budget	Average acquisitions budget
Public Institutions	9	R2,055,000	R228,333
University-based Institutions	7	R1,995,000	R285,000
Private Institutions	3	R460,000	R153,334
Total	19	R4,510,000	R237,368

The vast majority of the respondents (95%) reported that their institutions continued to acquire new works for their permanent collection. The budgets allocated to such new acquisitions, however, varied dramatically between institutions.

Amongst public institutions, more than a third of the respondents were either unable to provide information about their acquisitions budget or – more significantly – reported having no such allocated budget. These institutions all continue to acquire work – but are, however, dependent on donations and once-off sources of funding to acquire new works.

Among those public institutions recording the presence of an acquisitions budget, the reported size of this budget clustered in two ranges, from a lower end of R5 000.00 to R11 000.00 per annum (reported by small municipal museums). The second range – reported by well established municipal and national museums – ranged from R140 000.00 to R300 000.00 per annum. The highest response – of R1 million per annum – came from a university based museum, and represents an extreme outlier in this section of responses.

Amongst private institutions, only one collection (a Section 21 non-profit) reports the absence of an acquisitions budget. Once again, the reported size of the dedicated acquisitions budgets cluster into two groups.

5.2 Recent Acquisitions

	Number of Institutions Reporting	Number of new works acquired	Average per institution	Number of new works donated	Average percentage donated
Public Institutions	10	306	31	156	51%
University-based Institutions	7	173	25	132	76%
Private Institutions	5	202	40	30	15%

Amongst the public museums reporting the availability of an acquisitions budget, one third bought no new artworks in the previous twelve month period. In one case – that of a university collection with a significant acquisitions budget – this was explicitly linked to a change in management, and a corresponding period of institutional uncertainty. This should not be taken as a normal year in this organisation’s functioning, in other words.

Of the remaining public museums and collections that did purchase (or otherwise acquire) works in the previous twelve months, approximately one third reported acquiring only one new work. A similar number acquired under 8-10 works, and a final third acquired 12-19 works. (One outlying institution recorded a donation of 1325 cultural artefacts, but this can be safely recorded as an exceptional circumstance and no reflection on normal patterns. It is therefore not included in the chart above.)

Approximately 60% of the responding public institutions reported that a number of their new works had been donated, all by private individuals and none by corporate sponsors. These donations constituted between 33% and 100% of their recent acquisitions, and were reported as having values of between R80 000.00 and R100 000.00. (A notably low number of institutions reported the value of their donations, however.)

In contrast, all of the private institutions surveyed reported having acquired new artworks in the previous twelve months. These recorded acquiring either between 22 and 40 artworks, or between 60 and 73 artworks respectively – each group thus reporting significantly more acquisitions than those reported by any public institution.

All the university-based collections reporting registered receiving donations in the past twelve months. Of these, only one institution reported receiving donations from a corporate sponsor – in this case, of 70% of the institution’s new acquisitions. The value of these donations was estimated to be R650 000.00. The remainder of the donations to these collections were made by private individuals, and were estimated to be worth between R12 000.00 and R1.8 million.

5.3 Acquisitions Policies

The vast majority of the respondents (approximately 90%) reported having a formal acquisitions policy. Amongst public museums and collections, 60% reported prioritising the acquisition of local

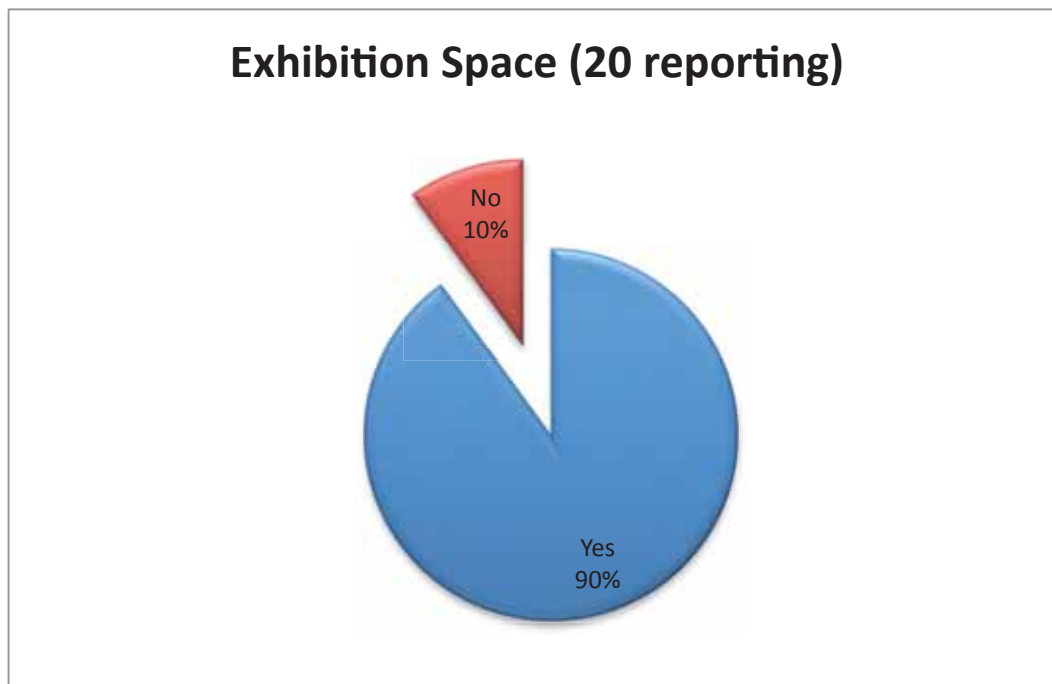
and regional artworks; a third of this group also placed artworks categorised as South African national on their list of priorities. A further 20% prioritised these national artworks, while another group included works from the remainder of the African continent on their list of formal priorities.

Amongst private museums and collections, only one respondent indicated that the acquisition of local and regional artworks was a formal priority. The remainder of the surveyed institutions indicated that they prioritised South African national artworks.

This suggests that private collections have significantly different acquisitions priorities, drawing upon a wider range of artists and artworks than many public collections – which prioritise the collection and representation of diverse range of regional artists and artworks.

6. Exhibition Programming

6.1 Exhibition Space



Approximately 90% of responding museums and collections report the presences of a permanent dedicated exhibition space or spaces within their institutional premises.

The exceptions to this rule report – in telephonic interviews – that they do not control or own the spaces in which their collections/exhibitions are displayed: one is housed in a large municipal museum, independent of the private collection, while another is displayed in the halls of a public government building. However, these collections do not necessarily have any control over how these works are displayed or curated within these external spaces.

The remainder of the respondents report possessing dedicated exhibition spaces, ranging in volume from 17m² to 1 627m². There was no notable disparity between public and private institutions in this matter, and no discernable pattern in the distribution of these volumes.

6.2 Exhibitions from the Permanent Collection

All but one of the respondents reported having exhibited part of their permanent collections in the previous twelve months. (The exception was one of the small number of respondents that did not report having its own permanent exhibition space, thus limiting its ability to display its own collection.) Respondents reported exhibiting anything between 0-10% and 90%-100% of their collections in the previous twelve months, and to dedicating a majority of their dedicated exhibition spaces to the display of these exhibitions from their collections.

Among public institutions, a third of respondents indicated that they had displayed less than 30% of their permanent collection in the previous twelve months; 22% indicated that they had displayed

between 30% and 50% of their collections; another 22% indicated that they had displayed between 50% and 80% of their collections; while a final 22% indicated that they had displayed between 90% and 100% of their collections in this twelve month period. A slim majority of these institutions therefore displayed less than half of their collections, while only a small number had the vast majority of their collection on display.

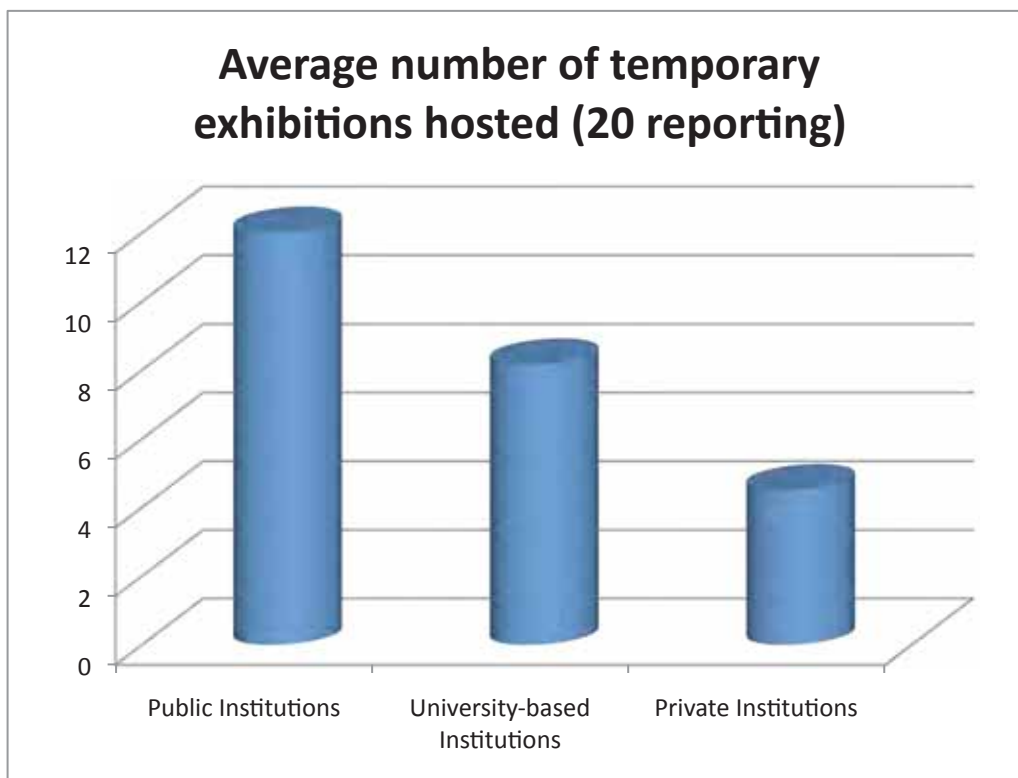
This is in clear contrast to the private institutions responding to the survey. Only one respondent – a university-based collection – indicated having displayed less than half of its permanent collection in the previous year. Just over 40% of respondents indicated that they had put between 50% and 60% of their collections on display that year; another 30% indicated that between 90% and 100% of their collections had been publically displayed in the relevant period. The remainder indicated displaying 60% to 90% of their collections.

It should, however, be noted that this discrepancy does not translate into an equal discrepancy in the relative proportions of these institutions' spaces dedicated to these displays from the permanent collection. Just under 25% of the public institutions reported dedicating less than 20% of their exhibition spaces to displays from their collections; a second quarter reported dedicating between 20% and 80% to these displays, and the remainder of the respondents reported dedicating 80% to 100% of their exhibitions spaces. Likewise, the majority of the private and university-based institutions reported dedicating a majority of their exhibition spaces to displays from the permanent collection – with approximately 42% indicating that between 80% and 100% of their exhibition spaces were thus dedicated.

6.3 Temporary Exhibitions



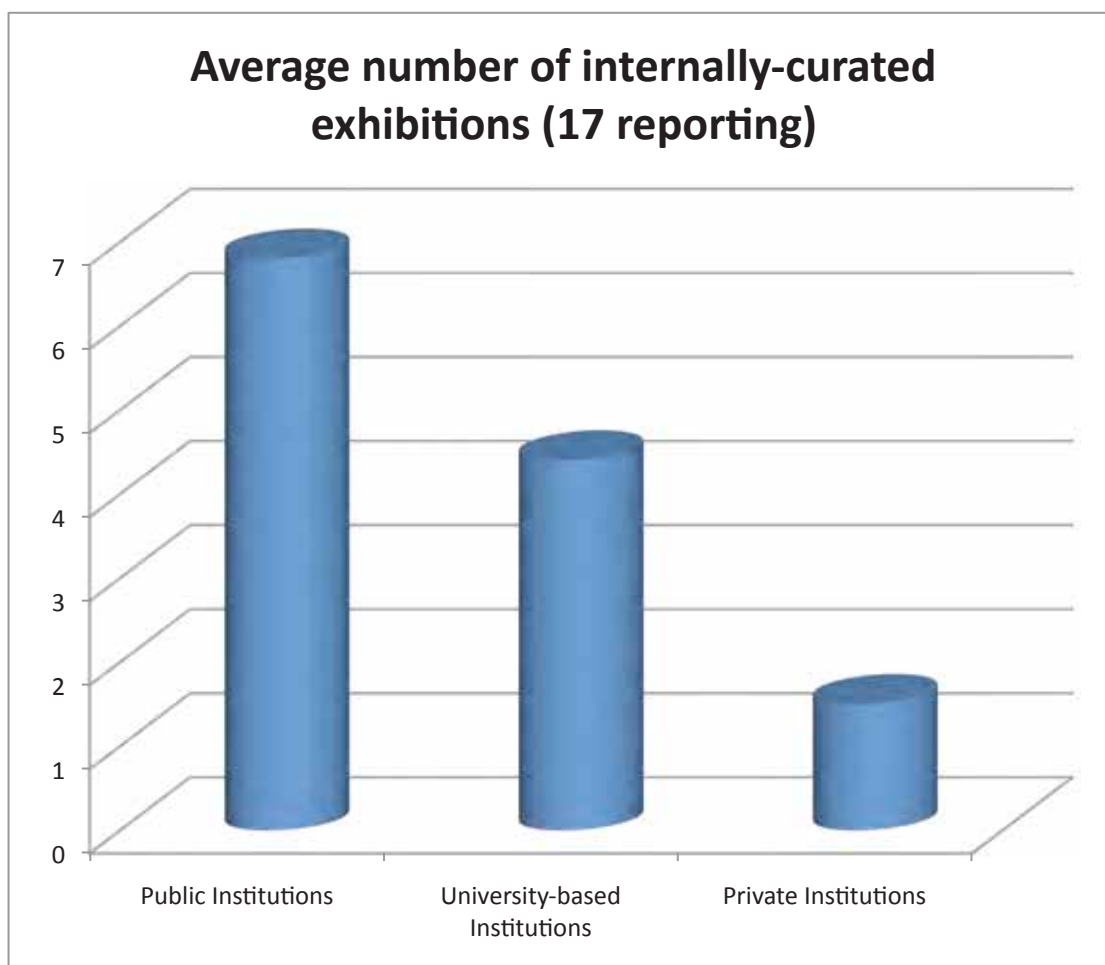
Approximately 88% of all respondents reported having hosted temporary exhibitions in the previous twelve months. (The 12% of respondents that did not host such exhibitions included two public collections without exhibition spaces, and a corporate collection.)



On average, public institutions hosted more than twice as many temporary exhibitions as private institutions did. (Averaging 12 exhibitions to 4.5 exhibitions in the past twelve months.) University-based institutions fell between these two poles, hosting an average of 8.2 exhibitions in the period. The highest number of temporary exhibitions were hosted by well-established municipal museums with large volumes of exhibition space; the two such highest numbers were 20 and 19 temporary exhibitions hosted over the past year.

The next largest group of respondents reported having hosted 10 temporary exhibitions in this period; two-thirds of these respondents were public institutions. The remainder of the responses – both public and the majority of the private respondents – reported hosting between 1 and 9 temporary exhibitions in the previous year.

6.4 Internally-curated exhibitions



All but two of the respondents reporting having hosted temporary exhibitions also reported that one or more of these exhibitions had been curated by members of their own staff.

On average, public institutions curated 6.8 exhibitions internally (constituting approximately 56% of the exhibitions displayed at these museums – see figures above.)

Amongst public institutions, those museums reporting the largest number of temporary exhibitions also – unsurprisingly – reported the lowest proportion of exhibitions curated in-house: out of 20 exhibitions, one was thus curated; or out of 19 exhibitions, only four were thus curated. These represent exceptions, however, and the majority of public respondents reported having curated between 33% and 100% of their temporary exhibitions in-house.

University-based institutions curated approximately half of their exhibitions internally. (Reporting an average of 4.4 internally-curated exhibitions out of an average of 8.2 exhibitions displayed in the period.)

Private institutions reported organising a third of their exhibitions internally. It is worth noting, however, that those respondents who reported hosting only one or two exhibitions per year also reported curating all of these exhibitions internally.

The majority of all respondents – both public and private – also indicated that these exhibitions were expected to travel to other institutions:



Amongst public institutions, one third of those that had responded positively had not been able to travel any exhibitions in the previous year – although they indicated that it was normally their practice to do so. Another third indicated that one exhibition had travelled in the previous year, and the remaining third indicated travelling up to 6 exhibitions in the period. These institutions indicated that these exhibitions would each travel to an average of 4 other locations – with the lowest reported figure being one and the highest being seven.

All private institutions reported travelling exhibitions, although approximately 28% did not indicate having travelled any exhibitions in the previous. A quarter of respondents reported having only travelled one exhibition in the previous year, while the remaining respondents all reported having travelled two such exhibitions. They indicated that these exhibitions travelled to an average of 2.8 institutions apiece – with the lowest reported figure being one and the highest being six, with most indicating 2-3 institutions per travelling exhibition.

7. Audiences

7.1 Audience Size

	Number of Institutions reporting	Reported total number of visitors over the previous year	Average number of visitors
Public Institutions	9	529,411	58,823
University-based Institutions	6	51,707	8,617
Private Institutions	3	19,621	6,540
Total	18	600,739	33,374

The majority of the respondents indicated that they did indeed keep some form of record of the number of visitors attending exhibitions, openings, or other events at their institutions. Well over half of the respondents (18 out of 28) were able to provide detailed visitor figures for the past year.

Among public institutions, visitor figures were notably and significantly higher than they were for private institutions. (These averaged out at 58 823 visitors per annum for public institutions versus 8,617 for university-based institutions and a mere 6 540 for reporting private institutions.) The range of response from public institutions varied, however, with some institutions reporting a relatively low number of visitors – 4 000 to 6 500 per annum – to other institutions reporting much higher numbers – 125 000 to 200 000 visitors per annum. The range of reported figures amongst private institutions was notably narrower: the lowest reported figure was a mere 550 visitors per annum, but the largest was no more than 17 000 per annum. This strongly suggests that public museums and collections remain significantly more accessible than private ones.

7.2 Audience Attendance Patterns

Approximately 62% of public institutions indicated that less than 10% of their visitor figures came from audiences attending exhibition openings; only one public museum reported that the majority (60-70%) of its visitors attended these openings and formal functions. One third of these public institutions suggested that over 60% of their audiences were constituted by casual visitors. The remainder of the visitor figures for most public institutions – between 30% and 60% of most institutions reported audiences – attended either school tours or took part in the institutions' various outreach programmes.

Amongst private institutions, casual visitors were by far the most common type of visitors, followed by those on school tours and those attending exhibition openings. Only one private institutions reported that a significant proportion of its audience took part in outreach programmes; most indicated that no proportion of their visitors took part in these.

7.3 Audience Demographics

None of the surveyed institutions – whether public or private – collected demographic data on their visitors. A very small number of institutions were willing to speculate informally as to the

demographic makeup of their audiences – but these responses must be treated with great caution, and can have little interpretative value.

However – keeping these cautions in mind – it appears that audiences are almost evenly split between male and female visitors. Most respondents indicated that under 25% of their visitors were either Indian or Coloured. Most indicated that between 25% and 50% of their audiences were black – with none reporting that less than a quarter were black, and some reporting that up to 75% of their audience could be identified as black. Two institutions reported that the majority of their audience – over 50% - were white; the remainder of the respondents suggested that anything up to 50% of their audience could be so described.

There were insufficient responses to distinguish between public and private institutions.

7.4 Visitors' Fees

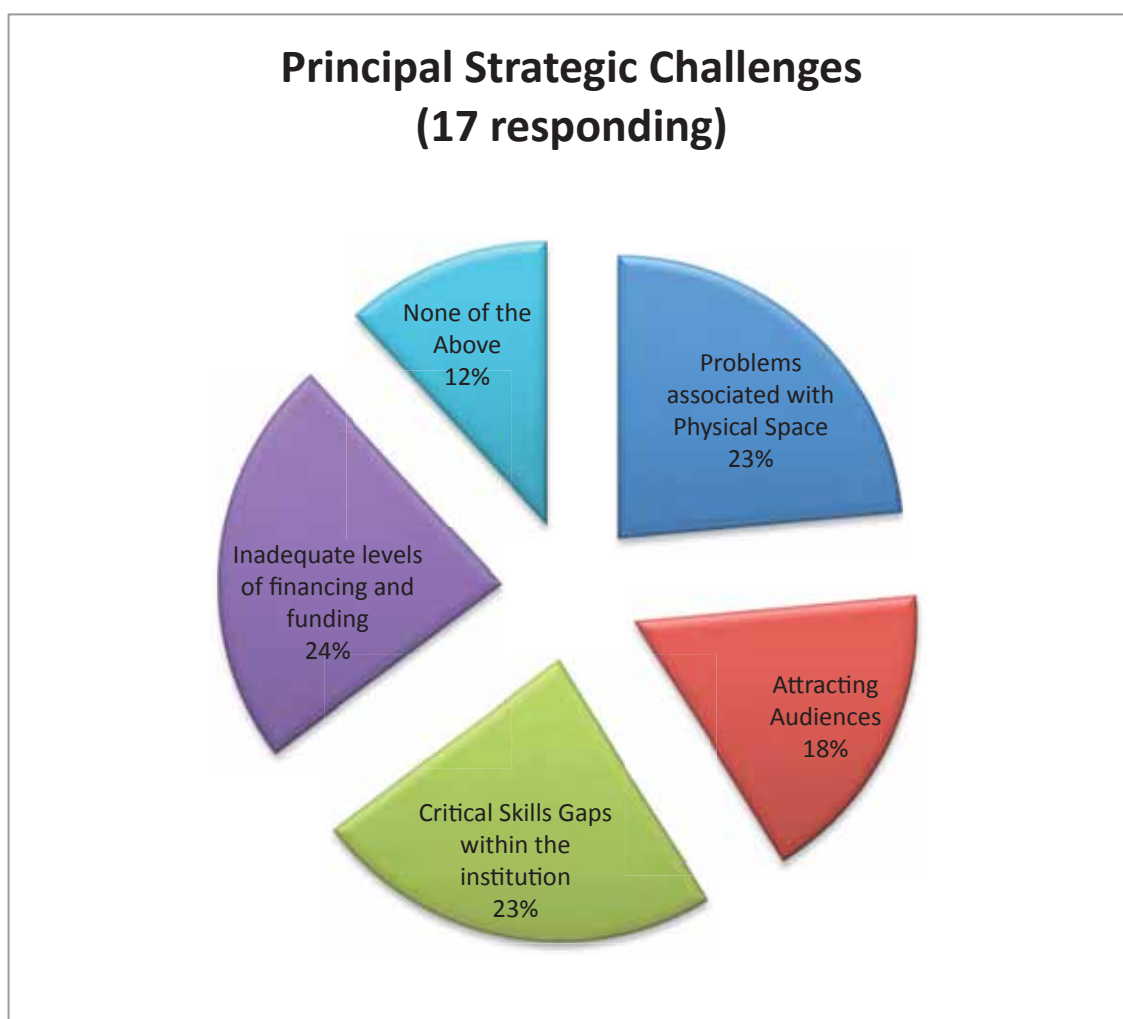
The majority of the respondents (78%) do not charge any entrance fee to members of the public. There was no clear pattern amongst the minority who reported charging an entrance fee: two identified as public institutions, and charged fees of approximately R25.00 for adults, with substantial discounts for young visitors and other concessionary categories. Two identified as private institutions – a university-based collection and a Section 21 – and charged fees of either R35.00 (with substantial concessions) or R5.00 (also with concessions.)

7.5 Publicity

All respondents reported publicising exhibitions and other events, while most (70%) indicated doing all their publicity internally. Only 30% had used external public relations companies at any time, most often to supplement their own internal efforts.

8. Strategic Challenges

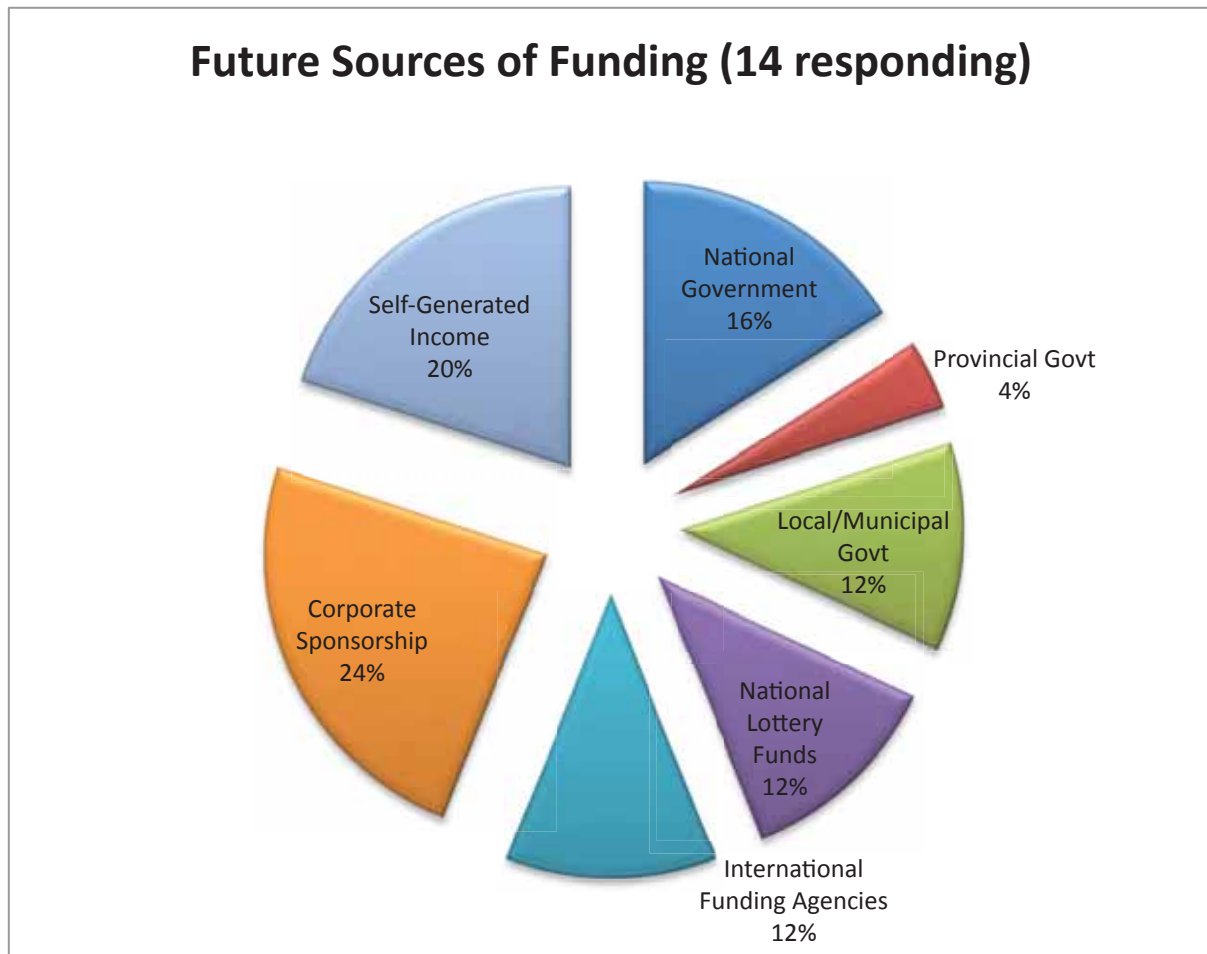
Note: Only the long-form survey questionnaires (used in the first stage of interviewing and surveying) included detailed questions regarding strategic challenges. These responses thus exclude those institutions taking part in the second, abbreviated, stage of survey gathering.



There is no clear consensus amongst respondents on what the most pressing strategic challenges to their institutions might be. When these responses are disaggregated between public and private institutions, however, some trends become discernable: almost all of the institutions reporting critical skill gaps were public institutions, as were the majority of those institutions reporting inadequate levels of finance and funding. Most of the respondents highlighting problems associated with their physical spaces were private institutions, with only one public or university-based institution reporting these problems.

It should be noted that this reflects the single most significant perceived challenge to these institutions; as is clear from further questioning, many of these institutions shared secondary concerns – with, for example, the majority of respondents believing that critical skills gaps existed in their organisations, although only 29% indicated this as their principal problem.

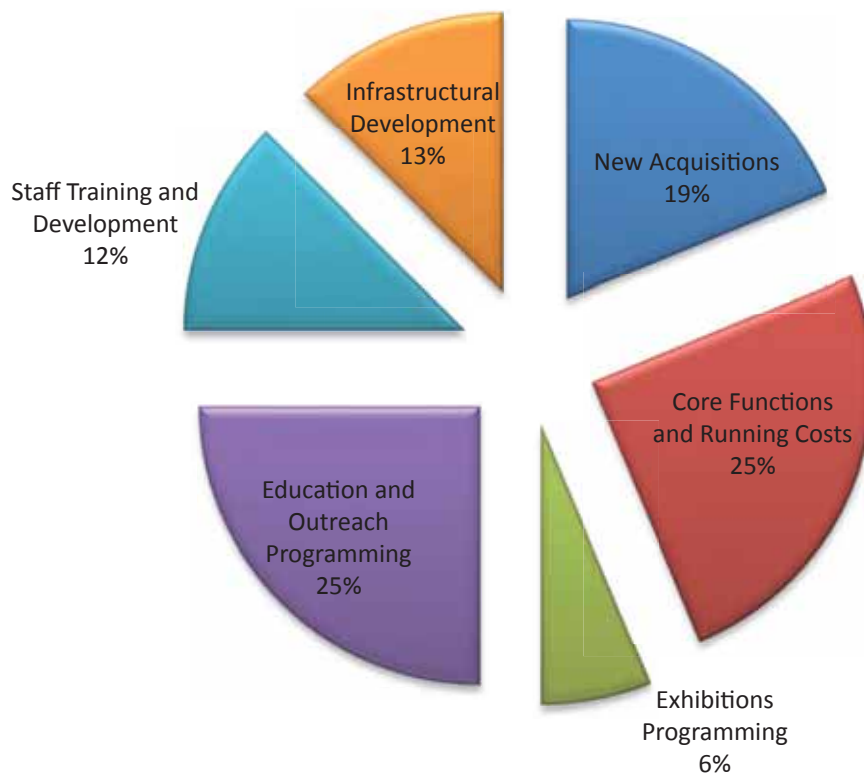
8.1 Funding Sources and Future Expenditure



When asked to indicate where the two most likely sources of future funding might lie, a majority of the respondents identified corporate funds or self-generated income. Only a small number of respondents identified national government sources as one of their two potential options; well under ten percent indicated either funding from Provincial Government Sources. This strongly suggests that institutions no longer see public funds as potential sources for increased funding; this may suggest that these institutions see this funding sector as saturated, and no longer capable of expansion.

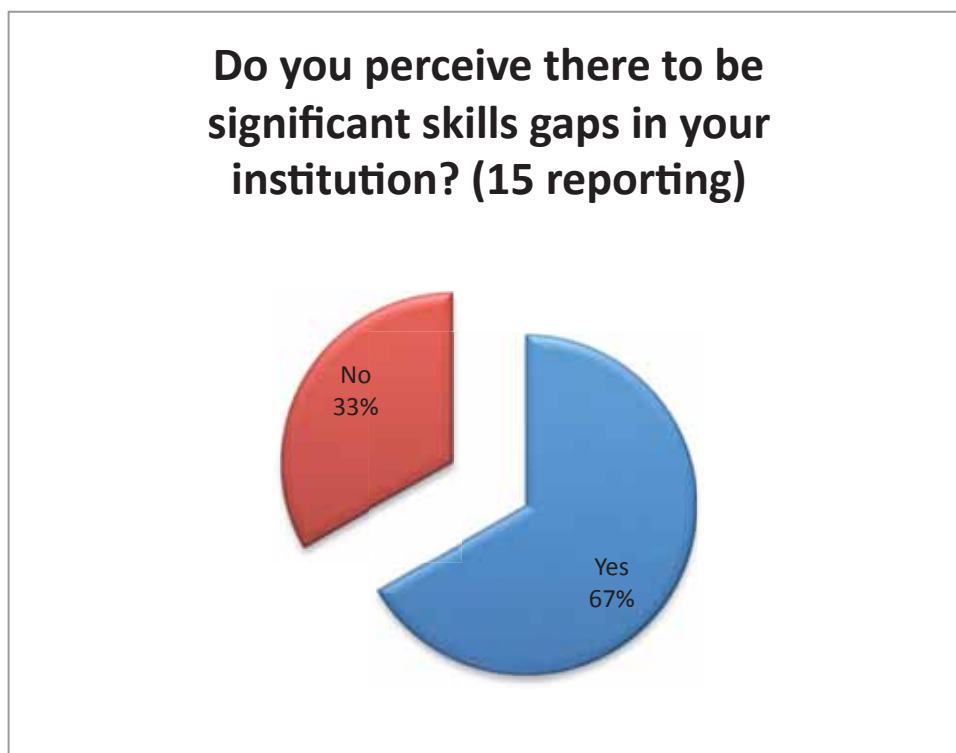
It is worth noting that despite the high numbers of respondents hoping to increase funding through self-generated sources, very few currently generate significant levels of income from this sources. This suggests that although this form of income is highly desired, it may not necessarily be a practical source for significant future expansion without a bureaucratic shift within many of these institutions.

Future Spending Priorities (16 reporting)



When asked what a potential increase in funding would be spent upon, 25% of respondents indicated that they would like to increase education and outreach programming. (Note that the majority of the surveyed institutions currently spend under 10% of their budgets on such programming; this suggests that is recognised as a significant problem by many of these institutions.) A further 25% - all of which were public institutions – reported needed to spend on core function and running costs. The remaining groups indicated that such hypothetical funding would need to be spend on infrastructural development, acquisitions, and staff training. (It is worth noting here that despite the paucity of acquisition budgets among public institutions, potential funding would have to be spent on more immediate running costs for most of these respondents. This suggests that the expansion and public collections is likely to lag behind corporate collections for the near future.)

8.2 Skills Gaps



Two thirds (67%) of responding institutions report the presence of significant skills gaps. This was distributed evenly across both public and private institutions – although, as noted above, all institutions reporting this as the most significant challenge were public museums.

When asked to identify where these particular gaps existed, and which would most urgently need to be redressed, given the resources to do so, the largest proportion of respondents indicated that fundraising and strategic management skills required urgent development.

Specialist museological skills – including restoration and conservation skills, curatorial skills and outreach and education programming skills – were also seen to be needed amongst many institutions. Notably, financial management and leadership skills were not seen to be urgently needed amongst many of the responding institutions.

8.3 Physical Conditions

The majority of respondents were relatively satisfied with the physical conditions of their current premises. Just over half of the respondents (54%) indicated that their physical premises were in either excellent or fine condition; another 15% indicated that only minor repairs were necessary. The remaining 31% of the respondents, however, felt that major upgrades were required.

None of the respondents were exceptionally concerned with the physical condition of their permanent collection. Just under half (46%) saw their collection as being in good order, while the remainder (54%) were confident that any minor problems could be addressed within their institutions.

8.4 Audiences

The majority of respondents (75%) reported that their audiences were growing – with the vast majority of these reporting a moderate rate of growth. Only one institution responding to this section of the survey indicated that its audience was in decline; the remaining institutions saw their audiences as stagnant.

Despite this general increase in visitor numbers, the majority of the respondents continue to emphasise the importance of attracting more local visitors to their institution; notably, only a third of surveyed museums and collection felt that developing a more diverse audience was of high importance. This suggests either that audiences are seen to have become significantly more diverse in the recent past, or that certain museums are complacent about audience development – as differentiated from audience expansion.

(It is important to note here that no museums keep demographic profiles of their audiences, which makes assessment of audience diversity difficult.)

RECOMMENDATIONS

1. Funding

1.1 A formal lobby to government to address the issue of tax rebates needs to be organised.

1.2 Further research into overseas models of funding could be beneficial in the local context. Structures allied to but separate from macro government and para-statal financial regulations need to be established to allow for more autonomy in fund raising.

It is evident that, in order to attract corporate and self generated funding, changes would have to be made principally to the legislation which currently does not recognise the museums sector – including corporate collections – as a bona fide educational sector qualifying for tax relief.

Fund-raising in institutions is hampered by top heavy bureaucracy which precludes entrepreneurship of any kind. If one considers institutions such as the Tate Modern in London and the Metropolitan Museum in New York, the revenue gained from the cafes, shops, etc. is a major source of income.

2. Acquisitions

2.1 A pro-active partnership between the Heritage and Arts Sectors should be encouraged.

The fact that most acquisition budgets are low and that acquisitions are being bolstered by donations should set a note of caution. The consequences of this could include manipulation by artists and dealers in promoting self-interest and the development collections which do not adequately reflect the democratic profile and heritage of the country.

Artworks need to be accorded heritage status so that the developments in each sector can reinforce each other.

3. Collections and Physical Infrastructure

3.1 The training of conservators is currently non existent in South Africa. In order to maintain art collections training centres need to be established.

The fact that the collections are being maintained in good order is a positive one and one which should encourage the further training of conservators and curators in order to continue with this seemingly positive trend.

4. Exhibitions

4.1 Mutually beneficial partnerships between public, university-based and private institutions should be developed, as should connection between South African museums and collections and museums in other parts of Africa.

The large number of temporary exhibitions curated and shared between public institutions is positive. A notable gap remains with co-operation with other African institutions which, despite

initiatives such as Nepad, have not taken off. More partnerships between corporate and public institutions could be of value to both in resource sharing.

5. Audience Development and Outreach

5.1 Research into the seeming lack of effective outreach programmes needs to be undertaken. This should target both non-museum visitors as well as those using various museum services.

5.2 Following this, new strategies and policies need to be formulated, at both institutional and national levels.

The relatively stagnant and under-resourced outreach programmes reported in this survey urgently need development. This is an issue which should be addressed at a government funding and policy level to keep in line with the White Paper on Arts and Culture. (1996). Surveys need to be undertaken with stakeholders and communities as to their needs and perceptions. This may also reveal local pressures and possibilities.

6. Management Demographics

6.1 A drive to attract graduates in a more demographically appropriate number to the museum profession should be undertaken. Surveys should be conducted on how best to attract this sector.

Current demographics do not appear to be fully in line with Affirmative Action policies. The majority of museum management is still white. Greater empowerment and ways to bring qualified and dedicated professionals who represent the demographics of the country is needed. From informal discussions and interviews it appears that this is not an attractive career path for a young graduate due to the still negative perception of museums, which in the public eye, still seem to reflect a static institution. Salary levels are also not competitive.

7. General

7.1 A professional public relations and marketing campaign needs to be established on a countrywide, generic museum level to increase public awareness of the importance of museums.

7.2 A Journal of Professional Museum Practice should be established to preserve institutional memory and disseminate best practice.

The Museum Profession does not market itself and its positive aspects strongly enough. This is an aspect which should be investigated. The SA Museums Association does not feature sufficiently in the sector and this needs to be investigated as its potential lobbying and training roles could be better utilised.

A loss of institutional memory is apparent in the reluctance of many new incumbents to answer the survey due to their inability to access information. This has occurred due to loss of experienced professionals over the past few years. This should be addressed.

Research Report

An Assessment of the Visual Arts in South Africa

Summary of Key Findings and Recommendations

The Human Sciences Research Council
African Micro-Economic Research Umbrella (AMERU),
University of the Witwatersrand
Thompson Research Services

for the

Department of Arts and Culture

September 2010

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South African National Association for the Visual Arts (SANAVA)

Art Source

Introduction

“For South Africa to fulfill its potential, the country needs to imagine itself as an “Afropolitan” nation, the avant-garde of a version of the African modern that is already in evidence in most contemporary African artistic and cultural forms. The country also needs to distance itself from an understanding of culture as pastness, a simple matter of customs and traditions, monuments and museums. We have to realise that culture is not yet another form of “service delivery”. It is the way human beings imagine and engage their own futures. Without this dimension of futurity and imagination, we can hardly write a name we can call ours or articulate a voice we can recognise as our own.” – Achille Mbembe¹, *Contemporary African Art: Negotiating the Terms of Recognition*

This document summarises key findings and recommendations from a major study of the visual arts sector commissioned by the Department of Arts and Culture (DAC) and undertaken by the Human Sciences Research Council (HSRC) working with a variety of partners. The project involved the conducting of an in-depth survey of over 350 artists, businesses and organisations working in the visual arts sector, together with a series of 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. The research project also involved the development of a database of over 6000 visual arts practitioners and 1200 business entities across South Africa.

The primary purpose of the project has been to present as accurate as possible a picture of the current position of the visual arts in South Africa, and to identify opportunities for growing the artistic, social and economic contribution of the visual arts in the society and economy. The report gives equal weight to the importance of each of these dimensions of the visual arts – while we have found that the visual arts plays a significant role in addressing the mandate of government in the social and economic realm, this contribution is predicated on there being an environment in which the exercise of the imagination and creative independence is nurtured and promoted. Aside from the important real and potential contributions that the visual arts make in, for example, education, public health and urban development, the core contribution of the sector revolves around the generation of compelling representations and propositions related to our understanding of who we are in a complex and rapidly changing world. The capacity of the work of artists to challenge our familiar and established patterns of perception and attitude, and to invoke both wonder and critical reflection, is fundamental to understanding the importance of the visual arts in a society composed of multiple identities, realities and ways of being in the world.

This summary proceeds through a synopsis of the key findings contained in the main report, followed by a set of related recommendations.

Overview of the Sector

The sector encompasses a diversity of activities, ranging from the production, presentation and critical reception of highly experimental, critically engaged creative work that may deploy a very wide variety of media and techniques (the so-called ‘contemporary’ visual arts), through to more conventional work that uses traditional ‘fine arts’ media and subject matter (the so-called ‘commercial’ visual arts), with a wide spectrum of activity occurring between these two poles.

¹ Mbembe, A. *African Art: Negotiating the Terms of Recognition*. accessed at: <http://www.chimurenga.co.za/page-127.html>

Partly fuelled by the unique history and contemporary realities of the South African society and economy, contemporary art in and from South Africa has achieved a significant profile globally, with a substantial number of artists being exposed on major international platforms for presentation and critical reception. In the post apartheid period, the South African visual arts have come to assume a significant position in the critical discourse on the contemporary arts, and their role and meaning in a postcolonial context. The sector has been invigorated by the emergence of a new generation of young artists, curators and entrepreneurs, who are increasingly connected into continental networks and critical forums.

The country has the most robust and structurally sophisticated visual arts economy on the continent, with an annual turnover of nearly R2 billion and a contribution of over R1 billion in added value to the national economy (R791 million of this in direct Gross Value-Added). The sector provides work and income for approximately 17 700 people in different capacities, 5 500 of these being full-time or part-time artists. The sector is composed almost entirely of small and micro-enterprises, and is largely commercially driven. While smaller than other parts of the creative industries such as book publishing and music, the economic dimensions of the sector are not insignificant, and warrant specific consideration from agencies and ministries concerned with economic development issues at a local, provincial and national level.

The sector has a highly educated workforce, with 72% of artists and 48% of employees and contract workers in businesses and organisations having qualified with a tertiary degree or diploma. There is evidence of a changing demographic within the industry, which has traditionally been largely white and middle class in profile. Based on the survey results, just over 57% of the entire workforce is black and just over 50% comprised of women. It also has a comparatively young workforce, with approximately 53,4% of people working in the sector (including artists) falling into the under-35 age group. However, while **women**, youth and black people account for a substantial proportion of employment in the sector, the senior management and ownership of businesses, institutions and organisations continues to be largely vested in white people.

The visual arts industry is overwhelming urban in character, largely concentrated in the three major metros of Johannesburg, Cape Town and Durban. Artists and businesses operating outside of these centres report substantial difficulty in developing sustainable careers and businesses, owing to their isolation from buyers, markets, skills and information. Though small in number, there are a variety of exemplary projects across the country that demonstrate the impact of the visual arts in education, urban and rural development, public health and job creation.

The report notes a lack of effective coordination in governmental engagement with the sector. Significantly, from the survey of business and organisations in the sector conducted as part of this study, the most frequently cited major obstacle to business and organisational development (from a list of 35 possible issues) is the 'lack of industry promotion from government'. While there have been some significant initiatives and investments made within some of the metropolitan municipalities and provinces, local, provincial and national government interactions with the sector have largely occurred in isolation from one another. The coordinating and policymaking role of the national department has on the one hand historically been confined to the resourcing and arms-length oversight over a set of institutions inherited from the colonial and apartheid period, and ad-hoc investments in some significant individual projects and initiatives on the other. The need for a more systematic engagement with the industry as a whole and the harnessing of the

complementary roles of other national ministries and local and provincial government departments and agencies represents a key focus of the recommendations attached to this report.

The industry perception of disassociation from government also however needs to be balanced against the somewhat informal and unregulated character of the industry itself. Alongside the need for more coherent engagement with the sector on the part of government, there is a complementary need for industry organisations and artist associations to present a more coherent face to government, and consideration needs to be given to how these organisations can be most effectively resourced to do so without compromising their autonomy and independence.

The report proposes a set of key principles, or cross-cutting considerations, informing and shaping recommendations related to the development of the sector. Five key overarching principles are proposed:

- Regard for the core values which drive activity in the sector in the formulation of any governmental engagement or intervention within the sector: innovation, experimentalism, independence, flexibility and tolerance.
- An approach to governmental engagement which achieves a balance and integration between a concern for the intrinsic value and meaning of the visual arts and the more instrumental applications of the visual arts in education, health, urban development and so on.
- Recognition of the importance of building connection and synergy between the urban centres of the industry and the less-resourced and more rural regions of the country.
- A commitment to achieving greater equity in the sector with regard both to wider access to the enjoyment and benefits that flow from exposure to and participation in the visual arts for a more diverse cross-section of the population, as well as to achieving the greater empowerment of black and women artists, entrepreneurs and initiatives in the sector.
- Industry development needs to occur *with* not *for* the sector. The approach to implementing recommendations should emphasise consultation, transparency of process and accountability.

Demand for the Visual Arts

Audiences for the Visual Arts

A key finding of the report suggests that public consumption of the visual arts – whether as audiences or consumers – is much smaller than most international comparators in the developed world, and that there is a significant untapped domestic market for the visual arts. While a 2009 research report commissioned by Business Arts South Africa suggests that 3.18 million adult South Africans (slightly less than 10% of the adult population) are ‘extremely interested’ in the visual arts and between 34% and 45% of adult South Africans go to art exhibitions, analysis of primary data on attendance at public and private art museums and collections estimates that only 1,2 million South Africans of ALL ages (2% of the total population of the country) visit these institutions annually, with the likelihood of some duplications in these visitor numbers.

By comparison, a 2002 report on the visual arts in Australia indicated attendance of galleries at 6.5 million in 2001/2, with 22% of the adult population (3.2 million) visiting art galleries

and 3 million attending art museums. While the study did not extend to an analysis of the population of people who actually buy visual artworks (for which there is no existing data), international studies show that this is a small proportion of those who consume the visual arts in the context of art museums and galleries.

Any strategy for the development of the visual arts in South Africa will need to have as a fundamental objective the widening of access to the experience of and participation in the visual arts. Aside from the public benefits that are associated with exposure to the visual arts, the growth and development of a domestic market will be dependent on the growth and development of a larger audience base and the integration of the visual arts into public life. This consideration has been integrated into the specific recommendations related to the market for the visual arts (Section 3), the organisational landscape for the visual arts (Section 4) and education and training in the visual arts (Section 6).

The Market for the Visual Arts

The study notes the complex articulation of roles among dealers, gallerists, auction houses, public and private museums and collections and individual artists in the sale of artwork. It has also highlighted the variety of kinds of work and associated markets that exist within the visual arts, from critically engaged 'contemporary' work that acquires value through a complex process of subscription involving institutions, dealers, art critics and collectors through to 'commercial' art with an essentially decorative function and whose value is determined through a less elaborate and more conventional supply/demand dynamic. The report also notes the general lack of regulation in the industry, with no widely accepted protocols or guidelines governing the business relationships between artists and galleries, as well as between artists and agencies of government which may seek to commission work or services from artists. A key recommendation emanating from this report concerns the development of such protocols and guidelines.

The present research project has gone some way towards quantifying the value of the market for the visual arts in South Africa, estimated to be in excess of R1 billion per annum. Turnover for sale of artworks the visual arts is valued at just over R1 billion per annum, excluding the value of auction sales – 83% of this revenue is generated from sales through galleries, and 17% from sales from artist studios and the direct commissioning of work from artists. A growing auction market for the visual arts which contributes an additional (roughly estimated) R250-500 million in gross turnover to the overall economic impact of the sector through the activities of auction houses, in the secondary market. This is less than 5% of the value of the UK auction market, suggesting that South Africa has a small but nevertheless significant developing secondary market for the visual arts relative to international comparators.

Both the domestic and international consumption base for South African visual arts is small by international standards, relative to both advanced economies and the rapidly expanding economies of India and China. As the Chinese and Indian examples make clear, growth in the art market is very directly linked to growth in the wider economy. The development of large new strata of wealth in these countries, now spread across the globe, has fuelled both domestic and international demand for Chinese and Indian art. While South African contemporary art has a significant profile internationally, UNCTAD trade data suggests that South Africa has a very small share not only of the global market for the visual arts, but also of the developing world portion of this market. At present, very few galleries are able to promote artists that they work with or represent internationally, owing to the substantial costs associated with attendance at art fairs and other trade events. The report

recommends that efforts be made to make the export promotion incentives and schemes of the Department of Trade and Industry and related agencies more accessible to entrepreneurs in the visual arts sector, and proposes greater coordination between the DAC and departments concerned with the international promotion of South Africa and tourism promotion.

The Joburg Art Fair represents a significant privately driven intervention (with some support from the Gauteng provincial government) aimed at growing the market for the contemporary visual arts. The Art Fair has both demonstrated that the visual arts can attract very substantial audiences (with positive year-on-year audience growth between 2008 and 2010), but has also demonstrated the vulnerability of the sector to periods of economic downturn, with gallery sales in the immediate context of the Fair showing negative growth during the course of the last three years. Greater public sector investment in smart initiatives aimed at encouraging new buyers into a complex marketplace have been given priority in the recommendations attached to this report, with a view to also facilitating more targeted investment in a growing specialist art publishing sector in the country.

Public sector demand for the visual arts has principally focused around the commissioning of public art - in the inner city of Johannesburg alone, this investment is estimated as being in the region of R15 million during the course of the last five years, creating substantial work opportunities for over 200 artists during this period. The need to promote the commissioning of both temporary and permanent public art more widely – particularly on the part of local government – is indicated as a key recommendation. Similarly, the report notes the significance of the Joburg Art Bank as an important initiative both with regard to broadening demand for the work of younger and emergent artists, and for cultivating new buyers for the visual arts. Stymied by underinvestment, the report proposes that the national Department and the City of Johannesburg, together with other stakeholders, examine the feasibility of developing this as a major national scheme.

The Organisational Landscape for the Visual Arts

The report includes extended consideration of the position of a range of public and independent institutions, organisations and initiatives concerned with the wider presentation of the visual arts, the development and exposure of new talent, and the realisation of the benefits of the visual arts in the areas of education, health and broader social development. Four broad categories of infrastructure have been considered:

- Art museums and collections
- Community arts centres and arts development organisations
- Non-commercial project spaces and artist-run initiatives
- Artist associations and industry organisations

Art Museums and Collections

South Africa has a substantial and relatively well-maintained infrastructure of public art museums and institutions, containing a store of visual artworks whose value is estimated, conservatively, at R2.2 billion. However, by comparison to countries with comparable levels of public infrastructure for the visual arts (such as, for example, Australia), our national and municipal public art museums and collections are dramatically underfunded. The traditional role that public art museums play in promoting the consumption of the visual arts and in both influencing (and growing) the market for the visual arts through the direct acquisition of visual artworks is severely constrained in the South African context on account of low levels of recurrent funding for these institutions. The capacity for significant new

acquisitions is negligible by even the most modest international standards – a pattern established under the apartheid government that has been largely sustained to the present day.

This study estimates that the national department of Arts and Culture invested in the region of R20 million rand in four national art museums and collections in 2008/9 – less than 5% of its total allocation of R432 million to national heritage institutions. Local government in the major metros and secondary cities collectively invested in the region of R50 million in 12 municipal museums in 2008/9. To place these figures in perspective, in the same year, the Australian government contributed A\$41.7million to the overall A\$61 million operating budget of the Australian National Gallery in Canberra in the same year – the equivalent of approximately R280 million spent on just one institution. This pattern of underinvestment is not specifically a phenomenon of the post apartheid period – it is however a pattern which has been sustained during this period.

The difficulties of public art museums and collections represent a complex public policy issue. This is partly due to the fact that they represent – in their location, built form and contents - the institutional legacy of an apartheid economy that invested significantly in a costly public arts infrastructure designed for the consumption of a minority of the population. New investment in heritage infrastructure has, unsurprisingly, been largely concentrated around new heritage projects (such as the Robben Island Museum and the Freedom Park) that engage with a political history and future orientation that is felt to have a broader resonance and audience than the historical and contemporary and visual arts can lay claim to. While these projects do have, in varying degrees, a visual arts dimension, neither the responsible departments and agencies across government nor the sector itself have managed to make a compelling case as to why the ‘inherited’ art museums and collections should also warrant new public or private investment. Further exacerbating this situation, the process of empowering a new generation of institutional leadership and management able to effectively direct and champion the interests of these institutions has been slow and uneven.

While substantial efforts have been made to transform the collections and programming of these institutions, and to mount innovative outreach and schools programmes, they have struggled to attract – from either government or the corporate/philanthropic sector – anything remotely approaching the levels of support that similar institutions in developed economies are predicated on. In spite of these disadvantages, institutions have managed to maintain a high rate of exhibitions and associated programming, providing space for the exposure of cutting edge talent within the country

The capacity of these institutions for generating revenue is also limited - on the one hand by their mandate as public institutions concerned with promoting access to the arts for all South Africans (only one charges a nominal entrance fee), and on the other by low levels of public benefaction and the consumption associated with significant attendance levels (catering, merchandise and so on). In contrast to the United States, where corporate and individual philanthropy (assisted by generous tax incentives) has built and sustained the largest public infrastructure for the visual arts in the world, significant and sustained philanthropic support for South African museums and collections has been the exception rather than the rule, with corporates more likely to invest in their own bespoke, in-house galleries and collections. Particularly in the case of municipal institutions, the regulatory framework for public finance at a local government level establishes a variety of

bureaucratic constraints around the attracting of external resources to these institutions, which the recommendations contained in this report also seek to address.

A parallel review of the policy and legislative framework for heritage institutions commissioned by the Department has recommended the development of a comprehensive funding policy for heritage institutions, which this report supports. This report further recommends that two key targets for complementary resources for these institutions that should be incorporated into the development of this funding policy are the corporate sector (for both acquisitions and capital infrastructure development) and the National Lottery Distribution Trust Fund (for capital infrastructure development and outreach programming).

Community Arts Centres and Arts Development Organisations

This report also explores the difficulties that attach to the position of an emergent national infrastructure of community arts centres and the role that this should be playing, both in supporting the provision of arts education in schools as well as in enabling wider access to the experience of and participation in the arts, particularly for communities located away from the traditional urban clusters of arts infrastructure. While the late 1990s saw significant investment in the physical infrastructure of these entities from government, these institutions – both those which are independently run and those run by local or provincial government - have struggled to attract significant and sustained investment from government, and are beset by a variety of ongoing constraints and challenges at the level of leadership, management, funding and programming. The focus on investment in capital infrastructure at the expense of investment in programming and the human infrastructure necessary to animate these centres has led to many of the centres built in the 1990s becoming proverbial ‘white elephants’.

Alongside government-owned centres, a number of old and newer non-governmental arts development organisations have developed a variety of innovative programmes concerned with the visual arts in job creation, skills development, education, public health and advocacy. In spite of their direct linkage to the social and economic development mandates of government, these organisations struggle to survive in an unstable and insecure funding environment, with limited access to reliable and recurrent sources of core organisational funding from the state, and an over-reliance on project funding from government and international agencies. This report suggests that there is in fact a sufficient pool of resources (principally within the National Lottery Distribution Trust Fund) that would enable these organisations to both survive and grow, but that these resources are not at the present time being effectively distributed or accessed. The need for greater synergy and connection between the activities of these organisations, governmental community arts centres, and the outreach programmes of public art museums and collections is also indicated as a priority.

Artist-Run Initiatives

A signal feature of the organisational landscape of the visual arts in South Africa is the near complete absence of independent and artist-run initiatives for the cultivation, presentation and promotion of innovation within the visual arts. Outside of the public and corporate museums and collections, the overwhelming majority of organisations involved in the distribution and presentation of the visual arts are commercial entities. There are only a handful of independent, artist-driven and non-profit project spaces and residency programmes around the country with a primary mission around the exposure of new talent, new ways of working and international exchange and collaboration outside of a commercial, profit-driven framework. These organisations play a critical role in the overall ecology of the

visual arts, but operate within a funding environment that is inimical to not only the proliferation and growth of these entities, but also to the basic survival of the few that exist. The need to demonstrate social and economic impact attached to a lot of publicly available funding places these organisations in an even more difficult position to the aforementioned arts development organisations, as their outcomes and impacts are even more difficult to define and measure.

Artist associations such as the South African National Association for Visual Arts (SANAVA) (and its many affiliate organisations), the Kwazulu Natal Society for the Arts (KZNSA) and the Association for Visual Arts (AVA) in the Western Cape have played an important role in developing new market platforms and opportunities for artists through competitions, international exchanges, workshops and member exhibitions. The Visual Arts Network of South Africa (VANSA) has emerged in the last five years as an industry organisation concerned with policy-related issues, advocacy and industry development projects through a network of artists, curators, administrators, businesses and organisations around the country. All of these organisations face similar constraints to arts development organisations with regard to their sustainability within a difficult funding environment.

The Position of Artists

Artists constitute the core human resource that sustains the sector, generating the artworks around which the activities of the rest of the sector largely revolve. It is estimated that there are in the region of 5 500 artists in South Africa, mostly concentrated in three major metros – Johannesburg, Cape Town and Durban. While – as noted above – there is evidence of substantial shifts in the overall demographics of the workforce for the visual arts, the majority (58%) of practicing artists are white, with a particularly poor representation of black women artists (comprising just 12% of the total population of artists based on the survey commissioned as part of this project).

Though it is estimated that artists directly generate 36% of value of the overall turnover of the sector and 32% of the Gross Value-Added through direct sales and private commissions, the social and economic position of most artists in South Africa is precarious. By comparison to professionals in other fields with similar levels of experience, training and qualification, the earnings of visual artists are low with poor levels of access to various forms of personal cover and security. The study notes that the average income of practicing professional artists is in the region of R149 000 per annum, with a marked income differential between black and white artists. Based on the survey sample, white male artists (the highest earners) earn on average R229 000 per annum and black female artists (the lowest earners) earning R67 000 per annum. Within these groups, there is generally a tiny strata of high-earning artists, a small group of artists able to earn a reasonable income from their work, and a large group of artists to who rely on other sources of income for their survival.

Only 19% of all artists are able to spend more than 70% of their time on their creative work and immediately associated activities, and one in four artists report only being able to devote 25% or less of their time on their creative work. The majority of artists have to supplement their income through other activities in order to survive, and there is a marginally *negative* correlation between the proportion of time invested in core creative activity and economic return. The majority of artists are unable to afford medical cover, life insurance and the various forms of cover related to professional practice. 57% have experienced significant periods in which they have been unable to earn income during the last five years. Considering their income levels, a surprisingly large proportion (59%) report

being registered for income or company tax in some form, though it is likely that much of this taxation may be in the form of ad-hoc tax deductions related to teaching and other work in the arts.

South African artists also report lower levels of gallery representation than their international counterparts, and the ratio of exhibition opportunities to artists is lower than in developed economies. Business relationships between gallerists and artists are seldom reduced to writing, and not subject to any industry-agreed (or externally imposed) standards, codes or protocols. Indeed, there is a complete vacuum in this area, with artists sometimes rendered vulnerable to the superior bargaining power of gallerists and dealers. Collection of payments related to copyright occurs on an ad-hoc basis, and it is generally only relatively established artists that are in a position to manage this issue in relation to their work, or earn any income from this source. Few artists – even more established artists – are in a position to take legal action against violations of their moral or intellectual property rights.

The survey found that the five most frequently cited obstacles to career development for artists are:

- access to funding
- the high cost of materials and supplies
- lack of demand/buyers
- lack of industry promotion from government
- a shortage of exhibition/project opportunities locally

The three most frequently cited primary professional development needs of artists were:

- learning how to market themselves more effectively,
- finding a gallerist to represent them and
- opportunities for research and study related to their practice

Assistance in obtaining funding was cited as the most significant secondary professional development need.

The report notes that the absence of a range of professional support mechanisms for artists in relation to the protection and exploitation of creative rights in their work, and the intrinsic constraints associated with collective bargaining in the visual arts owing to the self-employed status of the majority of artists. Consideration of how the economic position of artists might be improved has been integrated as a consideration into the bulk of recommendations in the report, whether through indirect measures aimed at expanding the market for their work and the creation of new platforms or through direct interventions around the professional development, the institution of collective management of copyright or legislative measures associated with resale rights.

Education and Training

The provision of education and training in the visual arts in the schooling system is arguably the single most significant area for governmental engagement in the visual arts, both in relation to the objective of nurturing the future audiences and consumers for the visual arts, as well as in achieving qualitative changes in the demographics of talent within the industry. That it is both a costly and long term area for intervention should not deter serious and urgent engagement with the many challenges that face the realisation of a quality arts education for all learners in South African schools, whether at primary or high school level.

Though the visual arts (as part of the Arts and Culture learning area) is now a compulsory component of formative education up to grade 9, the majority of schools have neither appropriately trained teachers and facilities to enable the provision of quality visual arts education at either a primary or high school level, in part the legacy of an education system which denied the majority of South Africans access to arts education.

The report also notes that the provision of specialised visual arts education at a grade 10-12 level (where it is an elective subject) continues to be largely confined to former 'Model C' schools. In 2009, less than 2% of all students took visual arts as a grade 12 subject, with 70% of all enrolments concentrated in Gauteng, Kwazulu Natal and the Western Cape. In 2009, black learners accounted for only 50% of these enrolments.

The report draws attention to the existence of a Memorandum of Understanding between the national Departments of Education and Arts and Culture, aimed at guiding their joint investment in arts education and training, as well as to a variety of policy documents produced by the (then) Department of Education which specifically promote the idea of artists working in schools in addressing the skills deficit within schools. The report notes that the implementation of a concerted strategy between the two departments for arts education at a formative level remains unrealised, and proposes that this joint engagement should be reactivated with major joint investment in programmes that widen access to participation and appreciation of the visual arts, and which create substantial work for particularly young and emergent professional visual artists. Such programmes should also harness the infrastructure and outreach programming of art museums and collections and community art centres.

While the country has a substantial network of tertiary art schools that offer internationally competitive professional degrees in the visual arts, these institutions face a number of challenges:

- Art schools are mostly located in the context of historically advantaged institutions in urban areas. Art departments at institutions such as Fort Hare and Walter Sisulu University remain dramatically under-resourced by comparison to their counterparts in historically advantaged universities.
- The report notes that there is a further erosion of black intake into visual arts programmes at a tertiary level, with just over 40% of enrolling students being black and just under 40% achieving their qualifications.
- While at any one moment there are almost as many students in tertiary art schools as there are practicing artists in the industry, the attrition rate for students then actually entering the industry once they have graduated is very high. The need to for more professional development inputs, mentoring opportunities and platforms for networking for young and recently graduated artists is indicated as a key area of recommendation.
- The staffing and infrastructure requirements of art schools in tertiary institutions are often poorly understood in the administrative contexts that they occupy. The need for more focused attention on the recognition of creative work as a research output is indicated.
- FET colleges currently play a minimal role in the provision of vocational training in the visual arts, and there is presently little or no articulation between training at an FET level, tertiary institutions and the frameworks for work-based training established through the Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority (MAPPP SETA).

Funding and Resources

Lack of access to funding is cited more frequently than any other issue as a major obstacle to career development for artists, and is the secondly most frequently cited obstacle for businesses and organisations.

The report notes that most of the funding mechanisms contemplated in the White Paper for Arts, Culture and Heritage have been realised, including the National Arts Council, Business Arts South Africa and the National Lottery Distribution Trust Fund. Components of this system are managing to issue increasingly significant numbers of grants to individual artists, projects and organisations. In the 2008/9 financial year, the National Arts Council distributed 91 grants with a total value of R5.6 million to the visual arts sector, many of these grants to individual artists.

Grant funding currently plays a relatively minor role in the economics of the sector, contributing less than a percentage of the total turnover of the sector. The total value of grants issued by all national funding agencies (principally, the National Arts Council and the Lottery) as well as grants made available through national and provincial government structures in the 2008/9 financial year is estimated at R12.3 million, with an additional R3.3 million being raised from international funding sources and half a million coming from Business and Arts South Africa and the Arts and Culture Trust.

The study has found that there are very significant unlocked public resources for the visual arts, the most significant of these being the National Lottery Distribution Trust Fund (NLDTF). The study notes the alarming accumulation of unspent funding reserves within the NLDTF, and the low level of disbursement of funds to the visual arts sector. Were the NLDTF to disburse 8% of the funding available in the 2008/9 financial year to the visual arts sector (equivalent to the 2008/9 proportion of total funding allocated to the visual arts by the National Arts Council), this would equate to approximately R76 million in *entirely new investment* for public art museums and collections and their outreach programmes, education and training programmes in the visual arts, visual arts-related community arts programming and infrastructure, artist-run initiatives and non-profit industry organisations. The report notes the need both a for a review of the grant administration system of the NLDTF, as well as concerted efforts to ensure that the sector engages more systematically in securing resources from the NLDTF.

While there are significant instances of corporate investment in the non-profit dimensions of the sector, and sponsorship of major events, projects and competitions such as the Joburg Art Fair, the Africa Art Centre and the Absa Atelier competition, by international standards, the sector enjoys very low levels of corporate investment and sponsorship. Total sponsorship is estimated at between R10 and R15 million – similar to levels of public funding in the visual arts. The report notes the need to create more awareness around the existing provisions for tax deductibility on donations, as well as the need to explore more substantial tax benefits for artists, organisations and institutions in dialogue with the Department of Finance and SARS.

Summary of Recommendations

The policy recommendations developed in this report have been informed by an overall analysis of the points of intersection between the visual arts and the world of public policy, institutions, legislation and programming. This report has sought to identify a set of key issues that the sector faces, and has drawn on a wide range of international precedents in developing recommendations that are appropriate and meaningful in the South African context. In doing so we have been mindful of four key considerations:

Firstly, the need to include substantial focus on growing the market for the visual arts, both domestically and internationally. The central concern of much arts advocacy revolves around supply-side interventions concerned with making available more public funding for the visual arts, whether through institutions or grants. This emphasis should not however obscure consideration for how the market and demand for the arts might be grown in a way that would mitigate the need for escalating public subsidy, and in ways which would help to transform the demographics of the sector. Indeed, this report has shown that the visual arts is in fact one of the more independent and resilient sectors of the arts in this respect, with much of the activity in the sector operating in the absence of public money. As the funding section of this report suggests, there is in fact very substantial funding available for the visual arts, principally through the Lottery, and principally targeted at the non-profit components of the sector. The need to consider ways in which these resources can be made more readily and widely available represents a key recommendation. The balance of this report has however been more concerned with both short and medium term interventions focused around market access and stimulating demand, as well as interventions aimed at growing the audience and consumption base for the visual arts in the long term, through a concerted strategy around visual arts education through schools, art museums and community arts centres. Cutting across all these interventions should be a concern for enabling greater access to the industry on the part of historically marginalised groups.

Secondly, the need for any proposed measures to meet a basic standard of affordability. Internationally, the majority of public sector measures that have been developed around the arts in general and the visual arts in particular, have been generated in the context of the advanced economies of North America, Europe and Australasia. These economies enjoy a fiscal base which is greatly in excess of the resources that are available in South Africa. A basic principle that we have sought to adhere to in the making of specific recommendations is that any proposed intervention needs to be affordable, both in relation to the public and private resources that are available, and in relation to other pressing demands on these resources.

Thirdly, careful consideration has also been given to assessing the prospective costs and potentially negative consequences of implementing particular recommendations, weighed against the likely benefits and impact yielded through such interventions in social, economic and cultural terms. For example, implementing the Artist Resale Right assumes the establishment and sustainability of an administrative capacity to collect and distribute royalties to artists, which would need to be justified by a sufficient value and volume of transactions in the secondary market (costs). It is also a measure that is likely to be resisted by both local auction houses and international auction houses that have a presence in South Africa, as it directly impacts on the cost of doing business, and may result in business moving to other national contexts where these measures do not apply (a consequence). However, international experience suggests that such measures can yield significant revenue for artists

(or their families) where comparatively meagre returns have been achieved on the primary/first sale of their work (a benefit).

A final consideration in the development of the recommendations in this report is the recognition that many of the problems of the visual arts in South Africa are in fact problems of the arts in general – the funding system and arts education being two signal examples. This report has been mindful of the fact that these more generalised problems need to be addressed through measures that have a compass beyond just the visual arts sector. This study has confined itself to noting these wider issues on the one hand, and suggesting sector-specific responses and remedies on the other, where these do not seem to exceed the mandate of the present assignment.

The report proposes a variety of recommendations for policy-driven intervention aimed at promoting the growth and transformation of the visual arts sector, and a set of key framing objectives have been derived from the preceding analysis. These objectives are focused around six mutually reinforcing key areas of impact, defined as follows:

1. Stimulating domestic and international demand for South African visual arts
2. Widening access to the experience of and participation in the visual arts
3. Strengthening the organisational infrastructure that supports the visual arts
4. Enhancing the social and economic position of artists
5. Attracting more investment and resources into the sector
6. Promoting greater coherence and cohesion in the sector and in sector-government relations

In the articulation of the ensuing recommendations, the impact of particular actions relative to each of these key objectives is noted, together with:

- An assessment of the cost of undertaking the particular intervention, relative to the envisaged impact. Each recommendation is qualified by a very broad indication of the cost involved in implementing the recommendation, as follows:

Level of Investment	Cost range
Low	Less than R2 million
Medium	R2-R5 million
High	R5 million +

- An assessment of the immediacy of impact and how long it would take to realise the recommendation

Immediacy	Timeframe
Short term	Within a year
Medium term	Within 1 – 3 years
Long term	3 years +

- A consideration of whether actions and investments are **once-off** or **recurrent**. In the case of recurrent investments, the importance of clarifying and determining the locus of responsibility for these functions within government is emphasised.
- A consideration of key roleplayers that would need to be involved in the realisation of each recommendation.

Recommendation 1: Engage the sector and government in the review, consolidation and effecting of the findings and recommendations contained in this report.

Strategic Linkages: Promoting Coherence

It is recommended that a national task team – the Visual Arts Industry Task Team (VATT) – be constituted through the convening of a national conference/summit of stakeholders in the visual arts industry, where the findings and recommendations contained in this report can be subjected to wider interrogation and scrutiny as a basis for taking them forward.

The task team would be composed *inter alia* of nominated representatives from the following groupings:

- Artists
- Galleries and Auction houses
- Independent platforms for the visual arts
- Visual Arts Development organisations
- Artist Associations and Industry bodies
- Tertiary institutions
- Government departments at a national, provincial and local level with a stake in or regulatory mandate over the visual arts sector

The functions of the Task Team would be to:

- Review the recommendations contained in this report
- Agree on a consolidated set of recommendations
- Provide leadership and oversight with regard to the implementation of these recommendations
- Ensure consultation and communication with the widest possible cross-section of the visual arts sector with regard to the implementation of these recommendations

The DAC would convene the proposed conference with partners, and provide secretariat support to the work of the proposed Task Team.

Key roleplayers: DAC, other government departments, industry stakeholders

Timeframe: Short-Medium

Cost: Low

Recommendation 2: Support regional market development initiatives that grow the local and regional consumption base for the visual arts

Strategic Linkages: Stimulating Demand

Provide targeted support for innovative local and regional initiatives across urban and rural contexts - and differentiated for the contemporary and commercial segments - that encourage new buyers, create buzz, make the industry and the market more visible through for example art maps, art tours, open studio projects, art nights, new approaches to marketing and the like.

Key Roleplayers: DAC, provincial departments of Arts and Culture and Economic Development, Business and Arts South Africa, tourism agencies, gallery networks, entrepreneurs, dti

Timeframe: Short-Medium

Cost: Low

Recommendation 3: Invest in innovative buyer education and development initiatives

Strategic Linkages: Stimulating Demand

Provide targeted support for innovative projects aimed at attracting particularly entry-level buyers into the market through print, on-line resources and events that promote the benefits of buying art and provide advice and guidance on how to go about it.

Key roleplayers: DAC, Business and Arts South Africa, industry organisations, art publishers.

Timeframe: Short

Cost: Low

Recommendation 4: Investigate the development of the Joburg Art Bank as a national scheme

Strategic Linkages: Stimulating Demand; Enhancing the Position of Artists

Working with the City of Johannesburg and the National Arts Council, commission an assessment of the position of the Joburg Art Bank and a business plan for the development of the agency as a scheme with national reach, and with a core focus on cultivating demand for innovative work from particularly younger artists entering the market among both private and public sector entities, as well as in the cultivation of entry-level buyers among the employees of these entities. Such a plan should involve consultation with the commercial gallery system in order to address potential concerns regarding the impact of such a scheme on the commercial market. The future of such an agency will be contingent on there being sustained investment in acquisitions on the one hand, and a professional and informed acquisitions programme, marketing strategy and general leadership and management on the other.

Key roleplayers: City of Johannesburg, National Arts Council

Timeframe: Short (review and business plan) Medium-Long (institutional development)

Cost: Low (review and business plan); High (institutional development)

Recommendation 5: Investigate the feasibility of instituting a zero percent art purchasing scheme

Strategic Linkages: Stimulating Demand

As previously noted, interest free art purchase schemes for the visual arts for entry level buyers and middle income earners can play a significant role in making the buying of the visual arts more accessible to more people. It is recommended that the Department develop this concept through engagement with Business and Arts South Africa and commission more detailed research on models internationally.

Key roleplayers: DAC, BASA, Joburg Art Fair, Joburg Art Bank, local financing institution.

Timeframe: Short (feasibility) Medium (implementation)

Cost: Low

Recommendation 6: Facilitate access to dti incentives and subsidies for the promotion of South African visual arts at trade fairs internationally

Strategic Linkages: Stimulating Demand

The DAC should play a role in facilitating access to Department of Trade and Industry financing, incentive and rebate schemes associated with addressing the cost of taking South African artists and their work to international trade events, aimed at galleries operating both at the contemporary and commercial/decorative arts end of the visual arts spectrum. The DAC should engage the dti and its linked agencies (e.g. TISA) on rendering these schemes more accessible to the visual arts sector, and packaging information on these schemes, and the export of artwork more generally, should be developed. Develop with reference to lessons learnt from similar endeavours in the craft sector.

Key roleplayers: DAC, dti

Timeframe: Short to medium term

Cost: Low-Medium

Recommendation 7: Promote the more widespread commissioning of public art, particularly through local government

Strategic Linkages: Widening Access; Enhancing the Position of Artists; Attracting Investment

The experience of public art commissioning in Johannesburg in particular has demonstrated the impact of public art not only on the public realm, but also the important economic benefits derived by artists. It is recommended that the DAC should play a role in promoting a more policy-driven approach to the commissioning of public art in other contexts, using the example of Johannesburg as a case study, together with reference to initiatives that have been undertaken in the Nelson Mandela Bay Municipality, Cape Town and Durban.

It is suggested that this should be achieved through convening a national summit on public art which would serve both to advocate the commissioning of public art more widely across the country, based on best practice examples both locally and internationally. The summit would also involve the sharing of best practice with regard to local government policy in this regard (e.g. the percent for art policy of the City of Johannesburg), the role of government and external specialists in the management of commissioning processes, municipal financial management systems and the resourcing of public art projects through municipalities securing resources through existing mechanisms such as the National Lottery Distribution Trust Fund.

Role players: DAC, municipalities, South African Local Government Association, key local government stakeholders and other departments and agencies that may have an interest in the commissioning of public art (e.g. the Roads Agency, the department of Public Works), the National Lotteries Distribution Trust Fund, industry organisations that have been involved in the commissioning of public art.

Timeframe: Short

Cost: Medium-High

Recommendation 8: Provide targeted support for the representation of South African art in contemporary art events on the continent and internationally

Strategic Linkages: Stimulating Demand

Biennales and a variety of other similar international platforms provide important opportunities for growing the profile of South African artists internationally and impact on their value and selling power. A particular emphasis should be placed on synergy with the increasing number of innovative new platforms developing across the African continent, and the encouragement of market linkages. The department should establish a high profile curatorial team through a process of public nomination which would advise the department on an ongoing basis with regard to the identification of platforms and the selection of artists. The department should facilitate linkage with the strategies and programmes of adjacent departments and agencies which have a complementary interest in the positive representation of South Africa internationally.

Key roleplayers: DAC, Department of Tourism, Department of International Relations and Cooperation, International Marketing Council of South Africa (Government Communication and Information System)

Timeframe: Short-Medium

Cost: Medium

Recommendation 9: Conduct a feasibility study for the development of a major contemporary art museum for the country

Strategic Linkages: Strengthening Infrastructure; Widening Access

While the majority of art museums and collections in the country have significant collections of contemporary South African art and associated exhibitions programming focusing on contemporary practice, the country does not have a major national institution dedicated to the presentation of contemporary art practice and the fostering of new domestic and tourist audiences along the lines of institutions such as the Tate Modern, the various Guggenheim museums and so on. While the development of such an institution has at various moments been contemplated by role-players in the public and private sector in both Cape Town and Johannesburg, these proposals have remained at a concept stage. While this study remains agnostic on the desirability and affordability of such an institution in the South African context and proposes that any such initiative would need to be predicated on major corporate investment, it is recommended that a scoping study be commissioned that draws on both local and international experience and expertise and international precedents and expertise. Such a study would need to consider:

- The rationale for developing such an institution in the South African context
- The role and functions of such an institution
- Options for the location/s of such an institution giving due consideration to the need to generate significant audiences and revenue, and whether such an institution should consist of a single substantial piece of infrastructure in one location, or be dispersed in more modest form across a number of locations.
- whether such an entity should be a stand-alone entity, or an extension of an existing institution/s
- Infrastructural and recurrent costs
- Financing and partnership models and approaches to sustainability.

Such a study should have as an explicit part of its brief the development of an informed framework for attracting and incentivising major corporate investment/s in such an initiative.

Key roleplayers: DAC (commissioning of scoping study)

Timeframe: Short (scoping), Long (Institutional development)

Cost: Low (scoping), High (institutional development)

Recommendation 10: Invest in joint/touring exhibitions and outreach programming, and strengthen the institutional network that supports such programming

Strategic Linkages: Widening Access; Strengthening Infrastructure

The report has noted that touring exhibitions and outreach programming represent a cost-effective way in which such programming – which involves substantial research and development costs – can impact beyond individual institutions and their audiences.

It is recommended that national funding be made available for developing joint exhibitions and outreach programmes which builds on and strengthens the existing co-operative relationships between art museums and collections across the country. Such programming should be aimed not only at enabling exhibitions to travel, but should also be linked to innovative outreach programmes and resources to travel with them, linking into schools and community arts centres.

This funding should ideally be made available either through an additional allocation to the National Arts Council for this purpose, or be directly funded by the national Department. Complementary finance for touring exhibitions and outreach programming should be secured from provincial departments responsible for arts and culture, and partnership with independent arts organisations and galleries encouraged in the development of such projects. The funding should include provision for enabling a Forum or Network of Art Museums and Collections composed of representatives from institutions which would meet on a quarterly basis to:

- Develop a workable model for the joint management of such a programme, and the allocation of resources between institutions
- Develop a 3 year programme for touring exhibitions and outreach programmes
- Develop detailed 3 year plans and budgets for joint exhibition and outreach programmes
- Secure complementary resources from provincial and local government
- Monitor and evaluate

The membership of such a forum or network would also include representatives from provincial departments. Ancillary purposes would include the development of best practice with regard to outreach programming, a bank of educational resources, and a shared network for the dissemination of these resources.

Key Roleplayers: DAC, National Arts Council, provincial departments

Timeframe: Medium and ongoing/recurrent

Cost: Medium/recurrent

Recommendation 11: Strengthen the acquisitions capacity of public art museums and collections through matching grant scheme

Strategic Linkages: Widening Access; Strengthening Infrastructure; Attracting Investment

Consideration should be given to the development of a nationally financed matching grant scheme to support new acquisitions. This would involve corporate investment in new acquisitions for public art museums and collections being matched by an acquisitions grant from national government, which could be administered through Business and Arts South Africa – which already has a similar scheme in operation for grant funding on this basis.

Key roleplayers: DAC, Business and Arts South Africa, funding bodies.

Timeframe: Medium and ongoing/recurrent

Cost: Low once-off (development of policy); Medium, recurrent (matching grant scheme)

Recommendation 12: Strengthen the capacity of municipal museums and collections to attract external funding and earned income

Strategic Linkages: Widening Access; Strengthening Infrastructure; Attracting Investment

This report has noted some of the difficulties that municipal museums and collections experience as entities of local government with regard to attracting funding and resources for programming and the reinvestment of earned income. The DAC should engage with museums and collections, as well as local government structures, around developing workable and effective models for museums and collections to attract and utilise external resources. Consideration should be given to the implications of the Municipal Finance Management Act, and the use of associated 'Friends Of' organisations and Trusts as vehicles for generating substantial additional income for art museums and collections.

Role-players: DAC, South African Local Government Association, Local government officials responsible for art museums and collections

Timeframe: Short

Cost: Low, once-off

Recommendation 13: Action national strategy for community art centres

Strategic Linkages: Widening Access; Strengthening Infrastructure

The report notes the existence of a national policy and strategy for the development of community arts centres. The findings of this report support the progressive implementation of this policy and strategy and proposes that a mechanism should be established for ensuring the strategy is implemented in such a way that:

- The visual arts are accorded a priority in the development of the strategy alongside other disciplines
- Particular attention is given to the creation of employment and training opportunities for artists and project funding opportunities for visual arts development organisations in the implementation of the proposed strategy
- Resources are made available to ensure that the touring exhibitions and outreach programming of public museums and collections is integrated into such a strategy (recommendation 10)

Roleplayers: DAC, provincial and local government, arts development organisations, National Federation of Community Arts Centres
Timeframe: Medium
Resources: Medium

Recommendation 14: Invest in professional development and mentoring programmes and resources for visual arts practitioners

Strategic Linkages: Enhancing the Position of Artists

Financial support should be provided for the development of courses, resources and workshops focused on preparing artists more effectively for dealing with the demands of professional practice (including legal and financial skills and knowledge), understanding the market for the visual arts, and the development of entrepreneurial skills. Advisory resources and guidelines for the conduct of commercial relationships between artists, gallerists and dealers should be developed in consultation with the industry.

Targeted funding should be made available to initiatives aimed at supporting market access and development for young, emerging and recently graduated artists, assisting them with accessing industry networks, exhibition opportunities and space to work.

There are a number of existing initiatives in this area, so the focus of the strategy should be on enhancing the capacity of these initiatives to deliver quality training to a wider cross-section of the visual arts community. The Media, Advertising, Printing, Publishing and Packaging Sector Education and Training Authority (MAPPP SETA) should be actively engaged by the Department as a financing partner, and to ensure that – where appropriate – these existing initiatives are drawn into an accredited framework for training.

Roleplayers: DAC, National Arts Council, MAPPP SETA, tertiary institutions, industry-training organisations and development initiatives
Timeframe: Short
Cost: Low

Recommendation 15: Investigate the feasibility of instituting artist resale rights – and the collective management of other creative rights for artists - in the South African context

Strategic Linkages: Enhancing the Position of Artists

The report has found that artist resale rights, copyright collection and exhibition payment schemes all represent significant mechanisms for artists to generate ongoing income from their creative work, and have now been instituted in a very wide range of national contexts. The report also notes that there are currently inadequate mechanisms in place to address any form of collective rights management for visual artists. It is proposed that the DAC should commission an inquiry into the feasibility of instituting these rights in the South African context.

Such an inquiry should involve a detailed examination of the likely revenue base for the institution of these rights, which would include an analysis of the selling patterns of auction houses (and where possible) dealers, as well as the variety of contexts in which copyright collection and exhibition payments might apply. The inquiry would review international models in each of these areas and bring together legal, financial and industry expertise, with a view to determining:

- The likely scale of financial benefit to artists generally versus the cost of administering such rights, with a particular focus on the scale of benefit to low and middle-earning artists, and to artists from historically disadvantaged communities
- The consideration of different approaches to the institution of such schemes, including consideration of an institutional framework, a model for sustainability and the extent to which all of these rights related payments might be managed by a single entity
- The likely impact (positive and negative) of such schemes on the visual arts market and the industry as a whole
- Recommendations and plans for a model for implementation

Roleplayers: DAC, Department of Trade and Industry, auction houses, dealers, publishers, industry organisations

Timeframe: Short (report and business plan) Medium (implementation)

Cost: Low (report and business plan) Medium (implementation)

Recommendation 16: Establish protocols, guidelines, standards and minimum rates for the employment, contracting or commissioning of creative work from artists

Strategic Linkages: Enhancing the Position of Artists; Promoting Cohesion

It is proposed that the Department should – with the oversight of the proposed Visual Arts Task Team – commission the development of a set of guidelines and protocols, standards and minimum rates for the commissioning, contracting and employment of artists to do creative work. In the first instance, such protocols and guidelines should focus on providing guidance and a set of minimum standards for public institutions, departments and agencies in their interaction with visual artists. The development of such a resource should also however include proposals for a code of conduct for the industry more generally, addressing in particular the more professional articulation and management of commercial relationships between artists and gallerists.

The development of such a resource should involve both consideration of international examples of such guidelines and protocols, as well as the widest possible consultation with industry organisations, artist associations, public institutions and local and provincial government in the development of the proposed framework. An additional purpose of such consultation would be concerned with educating both public officials and artists about the variety of issues that should be addressed in the negotiation of these working relationships, in the interests of ensuring that both parties are adequately protected. Such education should extend to particular consideration of the moral and intellectual rights artists have over their creative work, and the need for these to be addressed and protected in agreements that artists may enter into with both private and public sector entities.

Roleplayers: DAC, local and provincial government, artist associations, industry organisations
Timeframe: short
Cost: low

Recommendation 17: Develop and implement nationwide artists-in-schools scheme

Strategic Linkages: Widening Access; Enhancing the Position of Artists

This report has noted the dearth of available skills in the majority of schools in South Africa for the effective implementation of the arts and culture and visual arts curricula in primary and high schools. Practicing artists have the potential to make a major contribution in addressing this gap, as evidenced by pilot programmes undertaken in the Free State, Gauteng, Limpopo and Kwazulu-Natal. Such programmes also create alternative income streams for artists and have the potential to promote linkage and resource sharing between schools and community arts centres. They also have the potential to achieve significant impact in schools in the most disadvantaged areas of the country.

Working with provincial departments of education, provincial departments of arts and culture, tertiary institutions and arts development organisations, a nationwide artists-in-schools programme should be developed which involves the training, placement and supervision of artists in schools in support of both curricular and extra-curricular activities. Such a scheme should extend beyond the visual arts into other arts disciplines, and it should operate at both a General and Further Education level. Linkage between such programmes and the service learning requirements of university art schools should be developed. Universities and arts development organisations would be involved in the training, placement and supervision of artists working in schools. Finance should be secured both nationally and provincially on a matching grant basis, with the DAC and DoE playing an overall coordination and programme development role. The programme should also involve the organised sharing of best practices and the development of guidelines and resources for the effective implementation of the scheme.

The potential for such a scheme to catalyse the creation of a coordinating body for the promotion of extra-curricular/school enrichment programmes along the lines of USSASA (the United Schools Sports Association of South Africa) should also be explored.

Key roleplayers: DAC, Departments of Basic and Higher Education, provincial departments (education, arts and culture), tertiary institutions, and arts development organisations.
Timeframe: Medium-Long
Cost: High

Recommendation 18: Review the position of FET colleges in the training of artists

Strategic Linkages: Widening Access; Strengthening Infrastructure

This report has noted that FET colleges have historically played a marginal role in the training of professional artists – yet international experience suggests that they have the potential to provide an important and affordable alternative point of access into the industry, particularly for artists operating at the more ‘commercial’ end of visual arts practice. It is proposed that the DAC should engage the Department of Higher Education and FET colleges offering courses in the visual arts in a review of these programmes, with a view to identifying needs in respect of curriculum development, infrastructure and more effective industry linkage.

Key roleplayers: DAC, Department of Higher Education, FET colleges.

Timeframe: Short

Cost: Low

Recommendation 19: Review the position of art schools at historically disadvantaged institutions

Strategic linkages: Widening Access, Strengthening the Infrastructure

The report suggests that the history of underinvestment in art schools attached to historically black universities has been sustained (and in certain cases deepened) in the post-1994 period. The future development of art schools at historically black universities should be the subject of detailed investigation, focusing on the strategic position of these entities, and their needs with respect to:

- The development of a strategic vision and distinct offer
- Infrastructure development
- Curriculum development
- External partnerships and International linkage
- Diversifying and increasing the revenue/funding base

Key Roleplayers: DAC, Department of Higher Education, tertiary institutions

Timeframe: Short

Cost: Low

Recommendation 20: Promote transformation and equity in the sector through targeted support for creative, leadership and management training

Strategic Linkages: Widening Access; Strengthening Infrastructure

This report has noted in various places problems associated with black people accessing the visual arts sector, both within the realm of professional practice as artists, as well as in the leadership and management of institutions, businesses and organisations. The inclusion of equity criteria in the process of appointments for public institutions is clearly inadequate in the absence of programmes which ensure that there is a supply of skilled and experienced black professionals in a position to take up these positions.

The DAC should on the one hand consider additional funding for the National Arts Council's existing bursary programme scheme targeted specifically at young black artists and curators at both an undergraduate and postgraduate level. Consideration should also be given to the provision of 'art leadership grants' for tertiary institutions, public art museums, galleries and non-profit organisations to enable study, international travel and experience targeted specifically at black middle and senior managers, academics, entrepreneurs and curators.

A comprehensive approach to addressing this issue should be developed in consultation with the National Arts Council and tertiary institutions as the primary providers of the high level skills-sets under consideration.

Key Roleplayers: DAC, National Arts Council, tertiary institutions, public museums and collections.

Timeframe: Short-Medium

Recommendation 21: Promote greater coherence, articulation and efficiency in the funding system for the visual arts

Strategic Linkages: Strengthening Infrastructure; Attracting Investment; Promoting Coherence

It is proposed that a focused series of meetings be convened by the DAC with the full spectrum of institutions, bodies and agencies involved in the funding of the visual arts in South Africa – this should be done on the back of the national conference/Summit proposed in Recommendation 1, and should be informed by the consolidated findings regarding key industry needs and proposed interventions. This engagement would be aimed at addressing duplication of efforts and developing a more co-operative and targeted approach to funding within the current funding landscape. Such a process of engagement would seek to produce:

- A clearer articulation between funding bodies of roles, areas of responsibility and priority, and target groups in relation to areas of identified need within the industry
- The development of more efficient mechanisms for information and data sharing between funders, and with the visual arts sector
- In the case of governmental agencies, investigating options around the development of integrated grant management systems able to speak to one another, and addressing the specialised training needs of funding officers and administrators
- The development of a funding map and advisory resources that would serve as a guide for individuals and organisations within the sector as to who to approach for what kind of funding.

Such meetings should include membership drawn from the proposed Visual Arts Task Team (see recommendation 1). Notably, such an approach could serve as a template for engagement with other parts of the arts/creative industries.

Roleplayers: DAC, funding agencies

Timeframe: Short

Cost: Low

Recommendation 22: Review the role and position of the NLDTF in resourcing the arts sector.

Strategic Linkages: Attracting Investment; Strengthening Infrastructure

The implementation of many of the recommendations contained in this report relies on resources which are not foreseeably available within the national department or its counterparts at a provincial and local level. The report has also noted the accumulation of substantial unspent monies vested in the National Lottery Distribution Trust Fund (NLDTF), and the fact that the overall grant funding for arts, culture and heritage available through the NLDTF substantially exceeds the **combined** value of all other grant funding sources.

It is proposed that a high level engagement with the National Lotteries Board and the Ministry of Trade and Industry should be undertaken, aimed at promoting the position of the NLDTF as the single most significant funder of the non-profit arts sector in the country, and ensuring that these resources are deployed in a manner which synergises with an overall industry development strategy for the visual arts. Consideration should also be given to how to ensure that the grant management systems and capacity of the NLDTF/NLB correlates with the scale of finance vested in the body. The potential complementary role of other statutory funding agencies in acting as intermediary agents for the distribution of Lottery funding, should be carefully examined, drawing on international precedents such as the partnership between the UK Lottery and the Arts Council of England.

This would involve briefing the dti, NLB and NLDTF on key sector needs noted elsewhere in this report, and establishing an ongoing mechanism for communication and cooperation between the department and the NLB/NLDTF in this regard, as contemplated within the governing legislation for the NLB/NLDTF. Specific priorities to be promoted in relation to the needs of the visual arts sector include:

- Exhibitions and outreach funding for art museums and collections and community arts centres
- Core running and project costs for independent visual arts development organisations and spaces, industry bodies and associations, particularly those focused on providing opportunities for young artists entering the industry
- Major projects which promote the visibility and impact of the visual arts in public life, including public art projects
- Funding for visual arts education and training programmes in schools, including artists-in-schools programmes
- Funding for professional development programmes for artists, particularly those entering the industry

Key roleplayers: DAC, NLDTF/NLB, dti

Timeframe: Short

Cost: Low

Recommendation 23: Establish a join task team with the Department of Finance and SARS to investigate arts-specific tax benefits and incentives aimed at stimulating entrepreneurship and encouraging corporate investment

Strategic Linkages: Attracting Investment

This report has noted a variety of limitations that attach to existing tax benefits that accrue on donations from corporate bodies to arts organisations and institutions under Section 18(A) of the income Tax Act. It has also noted a variety of schemes that pertain internationally with regard to tax benefits for artists, creative businesses and organisations. It is proposed that the DAC should initiate the formation of a joint working group or similar mechanism with the Department of Finance and the South African Revenue Services that would be aimed at:

- Reviewing the existing provisions for benefits to the arts under the Income Tax Act
- Commissioning detailed research into the variety of benefits and incentives that exist internationally in relation to the tax deductibility of donations on the one hand, and the taxation of artists, creative businesses and organisations on the other, together with an assessment of the feasibility of instituting similar measures in the South African context.

The working group should also include industry representatives drawn from the proposed Visual Arts Industry Task Team.

It is additionally recommended that a promotional booklet be developed around the existing tax benefits so as to encourage wider usage of these provisions by visual arts organisations and the corporate sector.

Key Roleplayers: DAC, Department of Finance, SARS

Timeframe: Short-Medium

Cost: Low-Medium

Recommendation 24: Commission research on an ongoing basis that provides up-to-date industry data as a basis for monitoring and evaluating the impact of proposed interventions, and identifying new areas of need

Strategic Linkages: Promoting Coherence

The present research project has represented a significant first step in developing a knowledge base around the visual arts that can begin to provide both the industry and government with an informed basis for industry development strategies at a micro and macro-level. It is proposed that a standardised framework for this research be generated drawing on methodological insights gained through the present project, to be implemented every three years through a partnership between one or more tertiary institutions, industry organisations and the department. A successful precedent for this kind of programme has been established within the publishing sector, where a survey of the industry is conducted on an annual basis through a partnership between the DAC, the Publishers Association of South Africa (PASA) and the University of Pretoria.

Key roleplayers: DAC, tertiary institutions, industry organisations

Timeframe: Medium, recurrent

Cost: Low