

THE SOUTH AFRICAN VISUAL ARTS SECTOR¹

Summary of findings from 'An Assessment of the Visual Arts in South Africa' (2010) draft report for the Department for Arts and Culture, South Africa

KEY FACTS:

- 5,500 Artists
- 17,700 working in the arts
- Predominantly young (under 35), well educated (35% postgraduate, 30% undergraduate), working alone (60%) and self-employed (over 55%)
- 58% of South African artists are white, whereas 57% of the workforce is black
- A lack of consistent arts education in primary and secondary school is prevalent across South Africa, due to lack of trained staff and facilities
- Intake of black students to art schools is low (40%), as are completion rates for black students - at less than half those who enrolled (under 40%)
- small or micro-organisations make up 65% of the visual arts landscape, which is largely commercially driven
- The majority of organisations and artists are based in urban centres, specifically Johannesburg, Cape Town and Durban – with those working outside these cities reporting significant challenges to sustaining their practices and businesses
- Legacy of funding under apartheid has significant impact on public funding of the major arts institutions leaving publicly funded museums and collections
- There are also low levels of corporate sponsorship and philanthropic giving in comparison to other economies (approx.. the same amount as public funding - total sponsorship is estimated as R10-R15 million, approx £460-690k GBP)
- Smaller artist-run and community enterprises are faced with challenges given the low levels of public funding and requirements to demonstrate social and economic impact
- 91% of galleries are owned/managed by white people, with 34% being white females. In comparison only 5% of commercial galleries are owned/managed by black males, however 25% of non-profits are owned/managed by black males
- Only 11% of artists are selling their work internationally, the high costs for export and attending art fairs globally is prohibitive to commercial galleries
- 40% of artists report working with a variety of commercial galleries, however this is lower than their counterparts in other countries
- Relatively high numbers of South Africans report an interest in the visual arts, with 34-45% attending art exhibitions

¹ Summary compiled by Emma Flynn, 17/06/16. Draft report and appendices source: Visual Arts Network of South Africa (VANSA) <http://vansa.co.za/research/human-sciences-research-council-and-national-department-of-arts-and-culture-release-national-study-on-the-visual-arts-for-public-comment-1>

ARTISTS

It is estimated that 5,500 artists are working across South Africa. A survey of the visual arts found that they were mostly concentrated in three major metros – Johannesburg, Cape Town and Durban and had high levels of educational attainment (over 35% have postgraduate degree and over 30% have an undergraduate degree). Although a number of disciplines are practiced across the country, over 45% identify their primary medium as painting and drawing.

The survey identifies that 58% of South African artists are white, 33% black, 6% coloured and 3% Indian/Asian. In addition gender differences can be seen between these groups with 71% of black artists being male (29% female), whilst 66% of white artists are female (34% male). Black female artists are a significantly low proportion representing on 12% of all artists.

In terms of the working practices of artists, the majority of are self-employed (over 55%), and work mainly by themselves (60%). In terms of accessing markets to sell their work 48% sell through galleries, with 20% selling through their own home studio and a further 17% raising income through commissions. Although there are a range of other income sources for artists the most common is teaching in the arts, with 40% of artists deriving income from that source.

THE ARTISTIC WORKFORCE

There are 17,700 people working in the visual arts and data shows the majority are under 35 years old (53.4%), 50% are female, and 57% of the workforce is black. This is a marked change from previous data showing the visual arts workforce as predominantly white, middle class.

Leadership in the sector shows a different picture to the workforce as a whole, 91% of galleries are typically owned / managed by white people, with white women making up the highest proportion in senior and middle management roles – with 34% of galleries owned/managed by white females. Black females, in contrast, make up a large proportion of those working in ‘specialist technical’ and ‘ancillary/support’ roles. Less than 5% of commercial galleries are owned/managed by black males, however, over 25% of non-profit organisations are run by black males.

THE ORGANISATIONAL LANDSCAPE

In South Africa the visual arts field is composed of small and micro-enterprises, with nearly 65% of firms employing 1-5 people, and is largely commercially driven. As with the location of artists, the majority of activity is based in urban centres – with those working outside of these centres reporting substantial difficulty in developing sustainable careers and business owing to their isolation from buyers, markets, skills and information. Even within these

urban centres where there is increased activity organisations still face challenges with commercial galleries facing downturns in the market and not-for-profits struggling with inadequate spaces.

Art Museums and Collections: Public museums and collections are repeatedly described as significantly underfunded, owing to a legacy of overfunding during apartheid. While substantial efforts have been made to transform the collections (estimated to be worth R2.2 billion ZAR, equivalent of £101.3 million GBP), and programming of these institutions, the lack of public investment continues. Despite 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. These constraints are seen to be preventing the development of museums and their collections.

The Legacy of Apartheid: 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.

The need to demonstrate social and economic impact attached to a lot of publicly available funding, places **Community Arts Centres, Arts Development Organisations** and **Artist-Run Initiatives** in an even more difficult position – often struggling to attract significant sustained investment from government.

Commercial Galleries: 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. Although 40% of artists reporting working with a variety of galleries, these are lower levels of gallery representation than for international counterparts. Likewise exhibition opportunities for artists are also seen to be lower. In terms of representing artists internationally, the high costs for attending art fairs is prohibitive and has been highlighted as an area for development within the study.

THE MARKET & SUPPORT FOR THE VISUAL ARTS

The value of the market for visual arts in South Africa is estimated in excess of R1 billion (£46m GBP) per annum, with 83% revenue generated through gallery sales and 17% through sales at artists' studios. As such South Africa has a very small share of the global market for visual art, even in comparison to other developing economies. As such artists are

predominantly engaging in local markets (43%), regional markets (23%) and national markets (22%) – with only 11% selling internationally.

By international standards the sector enjoys very low levels of corporate investment and sponsorship. Total sponsorship is estimated as R10-R15 million (£460-690k GBP) – similar to levels of public funding in the arts. In addition there was a noted lack of industry promotion from government which was highlighted in the report. The National Lottery Distribution Trust Fund was also noted to have an alarming accumulation of unspent funding which could provide significant support for the visual arts (8% being the equivalent of R76 million, approx. £3.5m GBP).

Audiences For Visual Arts: In terms of arts audiences, survey data showed that 34-45% of adult South Africans go to art exhibitions, with 3.18 million people (just under 10% of the population) stating they are ‘extremely interested’ in the visual arts. In terms of education and training however, South African schools – both primary and secondary – report having no trained staff or facilities to provide quality visual arts education. In terms of higher education, many art schools are in historically advantaged institutions, with counterparts who are under-resourced. At this tertiary level they also describe an erosion of black intake into these programmes with just over 40% enrolling and just under 40% achieving their qualification.