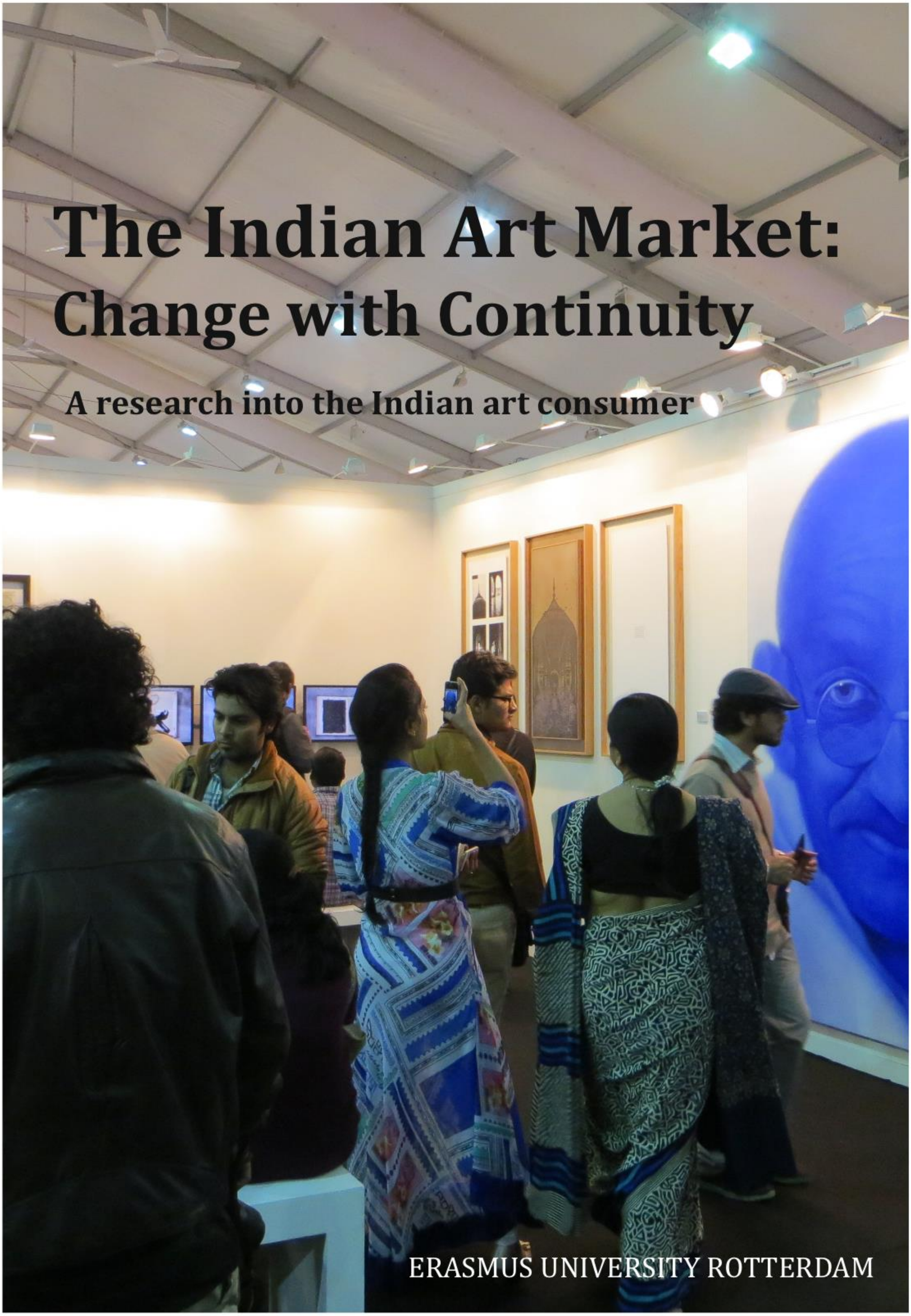
The Indian Art Market: Change with Continuity

A research into the Indian art consumer



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Foreword

Ever since I was a little girl, my father used to tell me incredible stories about his business trips to India. I feel absolutely privileged that as part of my master's program, I could really get to know this beautiful country from a cultural economic perspective; a journey I made not all by myself. I want to thank my supervisor Dr. Filip Vermeylen for inspiring me for this subject and introducing me to the India Art Fair. I would also like to thank Neha Kirpal and her team for letting me be part of this great contemporary art fair.

There is one person in particular I want to thank and that person is my grandfather. Full with passion and enthusiasm he joined me to India and has not left me out of his sight. Together we discovered the Indian art market and the beautiful culture India is rich. When I think of my master thesis, I also think of my grandfather and I feel lucky I was able to make this journey with him.

Abstract

As one of the BRICS countries, India's art market is emerging rapidly. With no artistic significance fifteen years ago, India now is the home residence of a big amount of galleries, the country hosted its first contemporary art biennale and yearly welcomes one of the biggest art fairs in the world: The India Art Fair. Starting from scratch, Neha Kirpal founded this fair in 2008, wanting to show what the Indian culture had to offer by bringing artists, collectors, museums and the general public together (ArtBahrian, 2013). With the rise of the Indian art market, the academic interests followed providing us with a fair amount of researches. But since these researches are on the production side of the sector, they have left a gap so far: Who are the art consumers of India? Through a survey held among the visitors of the India Art Fair 2014, a visitor profile was created, so this research can shed light on the consumer side of the Indian art market.

Keywords: India Art Fair – Indian Art Market - Indian Art Consumer – Art Infrastructure - Consumer Perspective – Visitor Profile

1. Introduction

It is difficult to imagine on site, but the economy of India is one of the biggest growing in the world. When you drive through the city of Delhi and you are confronted with extreme levels of poverty it is hard to imagine that this is the country that is seen as one of the most promising market grounds for the near future according to Christie's (The Guardian, 2013). The country where small mall nurtured children beg you for money, is the same country that has experienced a GDP growth of 15% in only one year, the year 2010 (Art Price, 2011). Although a visitor of India may remain skeptical since India is still fighting to provide even the most basic needs (Kazmin, 2013), the Indian economy is growing enormously within a relatively short period of time, a development most researchers and journalists identify (Van Hest & Vermeylen, Forth; Kazmin, 2013; Meyer & Birdsall, 2012; Velthuis, 2011).

Although the connection is often argued, economic factors seem to indicate the direction of the art market (Kraeussl & Legher; 2010). Also in the case of India, it is obvious that the Indian art market has flourished following the prosperity of the Indian economy. Within only one decade the contemporary Indian art market grew with 830%, and although hit hard by the economic crisis around 2010 (Art Price, 2011; Kraseussl & Logher, 2010), the Indian art market seems to grow even further. Behind the growing Indian economy is a rising population and due to economic prosperity their consumption patterns change (Meyer & Birdsall, 2012). With more basic needs fulfilled people are able to afford products less vital, luxury goods. The market for these goods in India has grown tremendously the last five years and is expected to grow by another 86% the coming five (The Guardian, 2013). Art works are also considered luxury goods, so with a growing economy, creating more income, the demand for works of art rises from emerging art markets like India (Baia Curioni, 2012; Velthuis, 2011).

Before the real emerge of the Indian art market, the small group of Indian art buyers had to go abroad to buy indigenous art works due to the lack of an Indian art infrastructure (The Guardian, 2013; Velthuis, 2011). According to Art Price (2011) Indian artists still depend heavily on international demand, but it seems that the Indian infrastructure is developing piece by piece answering to the growing demand of the new buyers of India. This is the reason why last year Christie's held its first auction in India. Since they have sold for years to Indian buyers in London and New York, they felt that there was a new generation of collectors developing in India (Kazmin, 2013). And indeed, a small and influential group of collectors, and thus a new market of collecting, is often identified as the driving force behind the development of the Indian art market (Van Hest & Vermeylen, Forth.; Kazmin, 2013; Baia Curioni, 2012; Velthuis; 2011).

The rapid growth of art markets all around the world is visible through the number of art fairs and biennales popping up everywhere. In forty years the number of art fairs has grown with the quantity of 186, starting with only three significant art fairs in 1970 (Baia Curioni, 2012). According to Baia Curioni (2012), one of the reasons for this enormous growth is the rising demand from emerging art markets. The demand from these markets asks for more cultural gatherings like art fairs where new art collectors from emerging economies can meet other people in the field, exchange ideas and, of course, purchase pieces of art (Van Hest & Vermeylen, 2013). Being the most important and most discussed development in the art world (Van Hest & Vermeylen, Forth; Velthuis, 2011), organizing such a cultural gathering adds to your art infrastructure, as does the India Art Fair for India (Vermeylen, Forth.). Organized for the sixth time last January and February, the India Art Fair is identified by Van Hest and Vermeylen (Forth.) as the most prestigious art event of India. And although relatively neglected by the literature, with 128.000 visitors in 2011, the India Art Fair was the third most visited art fair in the world that year (Baia Curioni, 2012). Not only the number of visitors increases every year, also the number of attending galleries and represented artists grows every edition (Van Hest & Vermeylen, 2013). Organizing an art fair of that size can be seen as a positive sign of market growth and even of modernization, boosting the Indian contemporary art market (Art Radar Asia, 2013; Baia Curioni, 2012).

But not only the event itself is the result of, and driving force behind, market growth, also the events surrounding the fair and initiatives that are being organized according to the same format as the India Art Fair cause the art infrastructure to expand. This development is identified by Baia Curioni (2012) as *cloning the experience*, describing the process of organizing other likewise art gatherings in surrounding area's and cities when the original event was a success. In 2012, for instance, the first Indian contemporary visual arts biennale was held in Kochi, in the state of Kerala (Biennial Foundation, 2011) and more initiatives seem to pop-up since the first edition of the India Art Fair in 2008. The success of the India Art Fair is not only cloned at different dates and in various cities, also during the four day fair, cultural events are organized throughout the whole city. Exhibition openings and other art related gatherings all over the city of Delhi spread the positive impact of the India Art Fair further than the exhibition grounds. But not only temporary initiatives see the light in Delhi. Whether it is the direct result of the India Art Fair or not, the last decades the city of Delhi has welcomed a big amount of art galleries (Kanzaki Sooudi, 2012; Azhar, 2011), showing that at least Delhi but maybe India as a whole is indeed an emerging art market.

There is an obvious consensus within the literature that the Indian art market is (rapidly) emerging and that cultural events like the Indian Art Fair contribute to this growth (Van Hest & Vermeylen, Forth; Baia Curioni, 2012; Velthuis, 2011; Kraeussl & Logher, 2010). But who the people are behind this growth, so the people who buy works of art and visit cultural gatherings, is only assumed in the current literature. Assumptions that go two ways. There seems to be an overall assumption, especially in the journalistic literature, that the people behind the Indian emerging art market are millionaires, a fast growing group within Indian society buying works of art for all different kinds of reasons (Art Radar Asia, 2013; The Guardian, 2013; Art Price, 2011). Scholars are less explicit in their descriptions but lay their focus more on the upcoming middle and upper class of India being the driving force behind the emergence of the art market (Van Hest & Vermeylen, Forth; Vermeylen, Forth.; Velthuis, 2011). Vermeylen (Forth.) for instance, describes the upcoming middle and upper classes from which a new group of art buyers is emerging and also Velthuis (2011) identifies the middle class, buying art to express their membership of this class, causing the new demand from the emerging art markets. This notion of the new middle class art buyer was partially confirmed during my visit to the India Art Fair 2014, where quite some people had the intention to buy, but were no millionaires. Also Indian lifestyle blogger and former artist Anandi Paliwal, says that there is a upcoming habit in India of normal middle and upper class people to buy a work of art as a gift for someone else (Informal conversation IAF, 2014). Of course there are different price levels in buying art, some only available to only the richest among us, but also the purchasing and visitation habits of the Indian middle class could contribute to the Indian emerging art market. And since this group is growing so tremendously, it is hard to deny the effect this group has on the economy and thus maybe also on the Indian art market.

Although these developments sound promising, we have to keep in mind that the development in India has 'asymmetrical consequences' (p. xiii) as the Indian professor of Economics Deepak Nayyar in New Delhi explains, providing positive prospects for some, and still extreme poverty for most. He argues that India is indeed going through a process of development, creating wealth and prosperity, but that the positive news coverage of the Indian society and economy is rather a perception than reality (Nayyar, 2012). This process of development over the last decades has created two worlds within India; the global and the *Bharat*. The global part of India is connected to the world through investments, foreign companies and the non-residential Indian (NRI). The NRI literary connects parts of India with the rest of the world by living abroad, but keeping ties with their home country (Amrute, 2012). These connections can be private but also in more businesslike spheres like starting a company abroad (and involving India) or investing in their home country. They also have legal ties with India, living abroad but officially being an Indian residence. But not only the NRI invests in his or her country, in times of economic prosperity foreign investors and companies also turn their attention to emerging countries like India, spreading their tentacles by founding businesses, pulling trading contracts or invest money. Connections that are not being made in the rural, traditional and relatively poor areas, but in the rich part that has the most potential, a part that keeps growing. This world shows all positive signs of development by growing GDP, growing middle class, high engagement in the world economy and is associated with international auction houses and galleries (Poulsen, 2012), a world also referred to as the 'Wall-Street India' (p. 7) by D'Costa (2012). The *Bharat* part of India is the local part representing the local economy that is interlaced with deep rooted Indian traditions with almost no connections outside its land or city borders. These two worlds in India are still different worlds that are hardly connected (D'Costa, 2012). The fact that these two worlds are so isolated from each other, also explains the fact why a big part of India remains in extreme poverty despite the growing economy bringing foreign investment and settlement. All the positive externalities from this growth all ends up at the global part of India (The Wall street India) and is unable to make its way to the *Bharat*. Where the economy is failing, maybe the supposedly accessible India Art Fair, or the India art infrastructure, is able to connect these two worlds and break the reality associated with the growth of the Indian economy; a hopeful change, but with poverty continuity (Nayyar, 2012).

Where academics first wrote about the significance of Indian craftsmanship and indigenous works of art (Duffek, 1983), researchers have now focused on the Indian contemporary art market that is rapidly developing since the last decade. Despite this increase of academic interest in this field, nobody knows exactly who the people are that buy the art and who visit cultural gatherings like the India Art Fair. Besides perspectives on the economic value of the Indian contemporary art market (Kraseussl & Logher, 2010) and on the effect of globalization on significant art fairs (Van Hest & Vermeylen, Forth; Vermeylen, Forth.), there is a growing need for insight into the consumption side of emerging art market of India (Van Hest & Vermeylen, Forth.).

1.1 Research Question

With this master thesis I want to provide this insight in the consumer side of the Indian art market that is lacking so far. But in order to understand that side of the Indian art world, you need to understand the Indian art market as a whole. First, I will map the Indian art market as it is today pleading that the concept 'art infrastructure' is more suitable to describe the artistic structure of a country. What is seen as part of such an art infrastructure is explained, covering institutions like galleries and auction houses, but also museums, art magazines and of course art fairs. After these subjects are positioned within the art infrastructure, the state of the Indian art market is discussed answering questions like: 'How quick is the number of Indian galleries growing?' and 'To what extend is the Indian government involved in the Indian museums sector?', questions of which the answers make you understand the state and the potential of the Indian art infrastructure.

After I have grasped a bigger understanding of the Indian art market, or I as rather call it, the Indian art infrastructure, I will shift the focus to the consumer side of this infrastructure. Who are the people that are driving this supposed emerge of the Indian art market? Who are the people that visit museums, buy works of art in a gallery or are interested in the displayed art works at an international art fair? Giving a complete overview of the Indian art consumer alone could already be a PhD subject. Due to time and volume constraints this master thesis will shed the first light on the demand side by creating a visitor profile of the India Art Fair. This art fair is chosen for a couple of reasons to be the start of this research into this side of the art infrastructure. This art fair is internationally known and has developed since 2008 into the most attended event in Delhi and into one of the biggest contemporary art events of emerging India. Another reason is the fact that all sorts of people are supposed to come to an event like an art fair; people who want to network, people who want to buy a piece of art, people who just want to look at the art works, who want to taste the atmosphere and people who want to see what is going on in the Indian contemporary art world. But not only people with different motives visit art fairs, also people from different nations and with different nationalities. So in short, creating an idea of the India art consumer can start of at the India Art Fair because of its (international) significance, its place in the art market and its diverse audience being representative for the rest of the Indian art consumer.

As with the art market, the concept of 'consumer' is also often associated with monetary transactions, consumers being people who actually buy a product or service. In the case of an art market, an art consumer would most likely be someone who buys works of art. As this research pleads for a wider perception of the term art market, also including places of non-monetary transaction like museums and journalistic platforms, the Indian art consumer will also be understand as more than someone who 'only' buys art. The concept will also mean people who visit art events only 'consuming' an experience. This reasoning results in not only including high profiled art investors and millionaire art buyers, but also the regular Indian middle class citizen who likes to visit an art fair or museum. This last group of people (the Indian middle class) is heavily neglected in art market literature in general, while this group has such a significant effect on the growth and sustainability of an art market. An art market not only grows as result of the buying behavior of a small group of millionaires, but also because of the general public who is educated about the arts and spend their free time in museums and at art fairs.

Although the Indian art market has got the attention of an increasing number of scholars over the last few years, the consumer side has been left out of sight. This research will be a pioneer journey, and will shed light on the consumer side of the Indian art market as one of the first. Not even the most basic information is known, so this will be the first attempt to get the Indian art consumer out of its anonymity by answering the following question:

RQ: 'Who are the visitors of the India Art Fair in New Delhi?

This question will be answered through a questionnaire held among the visitors of this annual Indian contemporary art event, providing answers to create a visitor profile for this art fair. As explained before, this event (and its visitor profile) will be the starting point for the analysis of the demand side of the sector proving the first information of the Indian art consumer in general and creating a foundation for future research into this relatively unknown group of people. This in combination with the mapping of the total art infrastructure of India will add to the cultural economics conversation in the field of emerging art markets, providing a new perspective supplementing this discussion.

2. Literature review

2.1 Art markets

A place of exchange of cultural objects is how Velthuis (2011) describes an art market, where the emphasis does not seem to be on the exchange of the works of art themselves, but more on the monetary transaction within this exchange. This monetary orientation is adapted by other scholars as well what tends to make us think about art markets in terms of economic value. Risk return rates of art investment are being calculated (Kraeussl & Logher, 2010) or conclusions are drawn about the whole value of a certain art market (TEFAF Art Market Report, 2014; Art Price, 2011; Kraeussl & Logher, 2010).

But let us first take a few steps back by looking at the art market as a whole. What is an art market? The first broad distinction that can be made is the one between the primary and the secondary market (Velthuis, 2011). The concepts already speak for themselves in a way. The primary market exists out of the sales of art works that are bought directly from the artist, either with the mediation of an art dealer or gallery, or without. If a work of art is sold for the second, or even third, fourth or fifth time in its existence, then that sale is part of the secondary market. If an artist invites someone to his studio, and this guest buys a work of art from him, then that sale is within the primary market. A sale on the secondary market would be one of Andy Warhol's prints for auction at Sotheby's.

Another difference, suggested by Velthuis (2011), that can be made within the art markets, concerns the scale and concentration of these markets. Some art markets are very locally orientated, with local artists providing for local demand, others are part of the global art market with 'headquarters' in world art metropolises like New York or Berlin (Velthuis, 2011). But whether you talk about locally or globally oriented markets, it is hard, if not impossible, to speak about one global art market. Although we tend to talk about worldwide sales of specific artists of a global artistic movement, the truth is the art market exists out of smaller art markets all with their monopolistic characteristics (Vermeylen, forth.; Velthuis, 2011). Not only can we talk about the Western European art market, the South American art market and the Indian art market, but also within these different markets there are again specialized segments in antiques, modernist art and contemporary art, which you can again divide in 19th century clockworks, cubistic sculptures and contemporary photography.

Within these different markets, whether globally orientated with first time sales or locally orientated selling antiques, specific intermediaries seem to play a central and essential role; galleries and auction houses. Studying these institutions or gatekeepers has also been the main point of scholars like the one of Kraeussl and Logher (2010) who used auction sales prices to determine the rate of return of art investment in upcoming art markets.

The relevant literature gives the impression that when you want to study the art market, you have to look at auction houses and, although there is a lack of data from these institutions, at galleries. But is the art market not broader than only these institutions? And should you not look at other institutions as well if you want to get an idea of the state of a certain art market? Ginsburgh (2003) makes no suggestion like this, but it seems that Velthuis (2011) and Robertson (2005) are taking the first steps into a broader perception of art markets. Robertson (2005) acknowledges the gatekeeping function of a museum influencing the acceptance and price of certain works of art while Velthuis (2011) besides this function emphasizes the educational role of museums. However it seems like they include institutions like museums into art markets, they only describe that these museums have an influence or impact on the art market, not that they are part of this infrastructure.

While talking about art markets you can even broaden the perspective past the inclusion of museums, like the number of art school present in a certain city, the number of big art events like fairs and biennales organized within a certain market, the scale and content of cultural policy brought forward by the government and even the size and number of online platforms interfering within the art market. Although it is understandable that scholars look at art markets in monetary terms (to tell the truth if we look at 'normal non- artistic' markets we also look at monetary results to determine the state of it) it seems that the art market is more than just economic values and monetary growth. Is it possible to grow as an art market if you as a market do not have an artistic atmosphere created by museums, art academies and online platforms making it more attractive for either collectors or investors to buy art within a specific market? Can you even speak of an art market if there is no such thing as an artistic network besides auction houses and galleries?

The answer to this question depends on the definition of 'art markets' or 'an art market'. If you are only interested in the development of price levels of certain works of art or artistic disciplines, looking at monetary statistics would be enough, something you could attach to the concept of an art market. But if you want to create a complete overview of the state and potential sustainability and talk about the possible emerge of a certain art market, only including these monetary statistics will not be enough since you exclude several important factors that are of influence on the state of an art market. So we should start talking about an art infrastructure instead of an art market, since an art market seems to exist out of multiple factors in order to arise, sustain and grow. So I would like to identify, as Baia Curioni (2012)started, the facets that are part of an art infrastructure as follows: galleries, auction houses, museums, art schools, (online) journalistic platforms, and big international cultural events like art fairs and art biennales. The case of the Indian art market shows the importance and significance of all the art infrastructure facets in creating and developing a real art market.

The literature and news coverage on the Indian art market knows two approaches. On the one hand the extreme rapid development of the Indian art market is praised. Galleries are popping up like mushrooms, auction house Christie's is emphasizing the great potential India has as an art market, the new Indian millionaires supposedly cannot wait to invest their money in Indian contemporary art and India is hosting major artistic events like the India Art Fair. On the other hand is the tone of voice pleading for caution while talking about the flourishing Indian art market. They confirm that India is indeed taking major steps in the development as a significant art market but is still lacking important facets in its art infrastructure (Poulsen, 2012). So developments that might seem to testify for the blossoming of the India art market (like Christie's auctioning in India or the India Art Fair being organized) are often only small artistic peaks with no sustainable art infrastructure to back them up. The coming paragraphs will shed light on those various parts of the Indian art infrastructure by first describing their position in an art market after which their (lack of) presence in the Indian art market is defined.

2.1.1 Galleries

Organizations that are a major puzzle piece of the (international) art infrastructure are galleries. Often referred to as art dealers, galleries seem to play a huge role within the art markets. But what are galleries exactly and what is their function?

Coming in roughly three sizes, galleries are enterprises with a (small) number of employees usually working there part time connecting art supply with art demand (Velthuis, 2011; Shubik, 2003). Shubik (2003) distinguishes fives types of dealers operating in the art world namely souvenir merchants, art dealers, collector-connoisseur dealers, amateur dealers and businessmen dealers. These types of dealers differentiate themselves by size and main motivation. Where the collector-connoisseurs sell on a small scale on the bases of art for the sake of art (wanting to share a part of their collection) and probably only putting a price tag on their sales to keep their organization going, the businessmen dealers operate a large scale financially successful gallery with also economical motivations in mind (Shubik, 2003). It is predominantly the last category that is part of the big international network of galleries with headquarters in large metropolises like New York, Berlin and London. The collector-connoisseurs are more likely to operate on a more local and sometimes national level and automatically represent less artists.

Not only can galleries be differentiated by their size, main motives of the owner or scale of operation, but also whether they are located in the primary of secondary market. If they sell within the primary market, galleries represent a number of living artists. Getting the art works mostly on a consignment base, these galleries main task is to create a market for their artists by, among others, organizing exhibitions within their gallery showing the work of the artists they represent. Also the galleries within the secondary market work according to this method, of course not getting the works on a consignment principle, but creating exhibitions of their current work hoping to get positive media attention (Velthuis, 2011). Although they sell heterogeneous products granting them with monopolistic advantages due to the lack of perfect substitutes, the art market is highly competitive due to low entry barriers since there is no official professional certificate to call yourself an art dealer (Shubik, 2003).

The way of operating can be traced back to the seventeenth century Holland and Belgium and even to ancient Rome according to Shubik (2003), which explains the current established and flourishing art markets existing in the West if we think of path dependency; the idea that the timing of happenings, and the way these happenings happen, affect their consequences (Sewell JR., 2005; David, 1985). But that contradicts the fact that all over the world art markets are arising, even in the less developed countries like Brazil, South Africa and India. Another factor, besides path dependency, can explain the rise of these art markets though. Crucial for an art gallery to be successful is a strong (professional) network (Velthuis, 2011), a network that exists out of artists, other galleries, collectors, but also museums and other institutions and last but not least, mediums like art journals (Poulsen, 2012; Velthuis, 2011), a given that again enforces the plead to start talking about an art infrastructure rather than an art market. So if a gallery manages to locate itself in a less artistically developed area, either other initiatives will follow or other pieces of the art infrastructure like museums or artists that are already there, will unite into one network, starting to develop into one art infrastructure providing the foundation for a bigger art infrastructure and thus an art market. Not solely history matters in developing an art market, but the necessity for galleries to have or create a network, explaining why all over the world artistic markets are developing.

This also seems to be the case in India. With only a handful of galleries in the whole of India before the nineties, this market segment exploded with over ninety galleries at the end of 2010 (Azhar, 2011). Although not everything is presented on the website www.artfacts.net, it provides us with an estimation of the number of art institutions per country and per city, showing us that the city of Delhi is the place of residence for over 50 private galleries. This is indeed a tremendous growth if you realize that only there were a few galleries in the whole of India twenty years ago. But if you compare it to the Dutch capital Amsterdam, with at least 216 private galleries on 810.000 inhabitants opposite to 18 million inhabitant of Delhi, you realize that this growth is still very small (Iamsterdam, 2014; India Online Pages, 2014). Besides that, only the international successful galleries in India, function according the Western model, creating a lifelong loyal bond with their artists. The rest of the galleries function more as a shop, representing and displaying sometimes hundreds of artists at the same time hoping to have something for every customer that walks into the gallery (Poulsen, 2012).

Despite this, the growth of the number of galleries in Delhi and the Indian art market seem to interact with each other since the overall growth of the Indian art market increases, over the same period the number of galleries has risen so tremendously creating an increase in the total economic value of this art market (Azhar, 2011). Not only galleries arise with art works worth tens of thousands of euro's, but also galleries with a lot of affordable art (starting from 5000Rs, around 62,50 euros) (Azhar, 2011), answering the big demand of the growing Indian middle class. Keeping in mind that this amount is still a lot of money for the Indian residences, it is imaginable that this rise of local demand, and therefore the increase of the number of galleries, is responsible for the big growth the Indian art market has been going through the last two decades. But what about the activities of international auction houses, selling Indian art to non-residential Indians (NRI's)? Already for decades Christie's and Sotheby's have sold Indian works of art to Indian people outside their original country, meeting this apparent demand, enlarging the values of these works of art also within India (Azhar, 2011). So it seems that where the galleries make the market grow from the inside out, meeting local demand, the auction houses seem to have 'prepared' or stimulated the growth of the art market from the outside in.

Due to the history of the country, Indian government is within their cultural policies still focused on heritage preservation and the enforcement of the Indian culture. Although they are opening up more, contemporary art is still having a hard time getting acknowledged and therefore supported by the government. India still knows a very little amount of contemporary art museums and public galleries, but also high profiled contemporary art schools. If every facet of the art infrastructure would be indeed extremely dependent on each other, the lack of museums for instance would stagnate the growth of the number of galleries. Despite the small number of museums and other government initiatives, the number of galleries has risen tremendously, even taking over the canonization of contemporary art (Kanzaki Sooudi, 2012). News coverage on the Qatari art market show a high degree of censorship and other government involvement (Harris, 2013, Pogrebin, 2013), leading you to conclude that this is pushing out the private initiatives. The lack of governmental initiatives in India seem to have stimulated the private artistic initiatives filling the gap themselves. This does not mean that governmental support is not needed in order to develop an art infrastructure. As the founder of the India Art Fair stated: '[…]if the government's level of support was able to match the level of enthusiasm for the expanding cultural sector, it would change everything' (Bajaj, 2014). Thus, private galleries have been founded despite the lack of governmental support, but with this support the number might have grown even more.

2.1.2 Auctions Houses

With their big network, art galleries are crucial within an art infrastructure making current markets sustain and grow and enabling upcoming art markets to emerge. While talking about the art market, the discussion is mostly located around the international auction houses. You hear about new branches of Christie's opening in Dubai, and Sotheby's having a record sales. Talking about the value and growth of the international art market, if you can speak of one international art market, people often use the number art works sold within auctions, or the total value of the auction sales to indicate the state of the art market. But what is the position of these auction houses? What is the role of these, often thought of as mysterious, organizations within art markets?

As opposite to galleries, auction houses are often associated with the secondary market selling art works for at least the second time in their existence. Collectors or investors offer their work of art to the auction house to sell, negotiating a reserve price. This is the price they want the art work sold for at least. If the bidding ends up under this amount, the sale is off. When the work of art is sold, the seller pays a commission to the auction house, as does the buyer. The latter is called a buyer's premium (Ashenfelter, 2003). Although this all sounds very straight forward and clear, the process of auctioning your work at an auction house is everything but that. Reserve prices are kept under the radar, works are hammered down even when they are not sold, and the whole ambiance (from chauffeur to auctioneer, all the way to the vase with flowers in the left corner of the bidding room) is set-up in a specific manner hoping to influence the bidding behavior of the buyers in a positive way (Smith, 2011; Ashenfelter, 2003). Although the whole auction 'process' is covered in this cloak of mystery, the whole art market seems to be determined by this piece of the art infrastructure; the value, as well as the overall international art mood. At the beginning of March 2014 the Dutch newspaper Algemeen Dagblad reported that the art market was flourishing again, and was back at the same level as in 2007, before the economic crisis (Algemeen Dagblad, 2014). The reason behind this positive message was the growth in worldwide auction sales and revenues.

Due to these wide spread messages people associate the art market mainly with the auction market, and although this is a matter of definition, this alone shows already the important position of the auction houses in the overall art market. And it seems as soon as an auction house as Christie's or Sotheby's establishes itself in a certain country, this country is recognized as an (emerging) art market, legitimizing the area for potential art collectors and investors. Not only attract auction houses (rich) buyers to specific areas, they also go to and hold auctions at places where they expect to find (new) buyers. But not only the actual settlement of these auction houses influences or even determines the movements of the global art market, also what the auction does up for bidding. The fact that Sotheby's auctioned Indian contemporary art influenced the price of these works and that might indirectly resulted in the establishment of two Indian auction houses that same year (Poulsen, 2012). So the whole art world looks at the movements big auction houses like Christie's and Sotheby's undertake, showing them the artistic hotspots or new interesting countries. December last year Christie's held its first auction in India. Although already specialized in selling Indian (contemporary) art to also mainly non-residential buyers in cities like London or New York, this auction was their first real step into India trying to target a new group of Indian millionaires (The Guardian, 2013). Although India has developed a strong network of galleries over the last two decades, with big yearly cultural gatherings like the India Art Fair, the arrival of Christie's seem to have put India officially on the map as an art market.

Although the recent arrival of auction house Christie's gives the impression the Indian auction market is just starting to develop, as just stated India knows its own successful domestic auction houses, the ones founded in the year that Sotheby's auctioned Indian contemporary art. Saffronart is one of these auction houses selling Indian modern and contemporary art, jewelry, collectables and antiques. Founded in 2000 and opening locations in Delhi, London and New York, this Mumbai based auction house sold last February for over 303 million rupees (3,79 million euros) (Rathore, 2014; Saffronart, 2014). India's first real auction house was Osian's auction house organizing their first auction in the year of 2000, selling contemporary paintings. These auction houses are well established within the Indian art market, but are content with the arrival of international appreciated auction house Christie's. Not only do they believe that coming year will be a successful one because of the presence of Christie's, but this also marks the revival of the Indian art market, after it suffered from the economic crisis (Rathore, 2014).

The network of art galleries is crucial for the development of an art market, as we saw, but it seems that auction houses have the power to legitimize certain markets as art markets as the case of India shows us. India has developed a relative strong gallery system over the last decade, but despite this, the Indian art market seems to be really recognized as an art market with the arrival of international famous auction house Christie's last year. Maybe also because Christie's organizes 80% of all their sales in only 4 significant countries (Quemin, 2013), going to India this auction house is really convinced of its potential. But would the auction of Christie's in Mumbai also have been a success if there was no such thing as a (beginning) Indian art infrastructure? You could even argue that they would not have organized this auction if there was no gallery network in the city of Mumbai. While art galleries target also the middle class with their affordable art, auction houses seem to draw the millionaires, making them both crucial in creating an art infrastructure that goes into different layers of the Indian residence, creating a solid art infrastructure.

2.1.3 Museums

Since one or two decades museums as institutions are often thought of as part of the economy. As an economic agent, museums are subject to the dynamics of the economy and producing output like the preservation of their collection and the established exhibitions, but also economic impact by creating jobs and revenue effecting their surroundings (Fernández – Blanco and Prieto – Rodríquez, 2011; Johnson, 2003). Therefore the museum sector as being part of the economy is mostly associated with the tourist, restaurant and hotel branches (Frey and Meier, 2006) but not as part of the art market of a country.

This thesis pleads for a bigger definition of the word 'art market', so also for the inclusion of museums. Although these institutions are not a place for monetary artistic trade (the sales of paintings or other art works to companies or individuals), museums are also part of the art infrastructure of a country for a couple of reasons. First of all the public is educated through museums (Feldstein, 1991). People learn about the history of art, the significance of it, but also about the content creating more familiarity with and appreciation for art in general. Not only the actual museum visit learns people about art making them familiar with the art world, the presence of a museum within a community creates some kind of artistic awareness for the community members. They are used to the museum and therefore to an artistic atmosphere in their neighborhood and cultural awareness is part of daily life. Artistic notion forms fertile ground for the trade of art works and other cultural activities like cultural gatherings.

Another function museums are often associated with is the task of heritage preservation (Feldstein, 1991). They are the ones showing the public their own (art) history by displaying and restoring works of art, but also trying to prevent that we lose a too big of a percentage of national art to foreign buyers (Stebbins JR. et al., 1991).

Not only do museums have an educational function familiarizing their visitors with art or have the task to preserve national heritage, they also have what Frey and Meier (2006) call the *prestige value.* This is the utility people get (even without visiting the museum themselves) from the idea that there is a museum in their community what will be highly valued by outsiders. But you can also look at this concept from this outsider's perspective. Because people give some level of prestige to the fact that a museum is present in a certain area, they are also more likely to be attracted to that same area. Not only regular inhabitants, but also people involved in the art world like art dealers, artists themselves, other cultural entrepreneurs but also art buyers. So museums do not only serve private benefits for the people actually visiting a museum, but do also know something like an instrumental value as defined by Snowball (2011). These are the side effects that brings a museum with it, like the fact that people also spend money outside the museum (also known as positive externalities), but can even be stretched to arguing that a museum leads to job creation and improvement of the infrastructure in the long term (Snowball, 2011). This brings her to Florida (2002) who indeed argues that the creativity in a city can be the driver behind economic growth and cultural significance (Florida, 2002), museums being the starting point attracting other cultural entrepreneurs, creating a cultural hub. So without being a place of monetary trade, museums certainly are part of the art infrastructure, either providing art education or creating an artistic atmosphere that stimulates artistic trade.

Although India is often accused of lacking a significant museum sector (Poulsen, 2012), India knows quite a number of museums. Most of these museums cluster around big cities like Mumbai, Delhi and Kolkata. This does sounds promising, but in India these museums are not built to enforce the Indian art market but to bring Indian cultural policies into practice (Fuchs, 2014). Where most Western countries have cultural policies that have roots going back centuries (Pots, 2000), India's current cultural policies have only developed for the last sixty years or so. Being a British colony for almost 90 years, the country of India gained its independence in the year 1947. To bring back their own culture and make sure that the Indian identity is enforced, the Indian government began with their cultural policies. As part of the governmental five year plans, the Indian government started formulating the goals of the new cultural policies which had to be in service of Indian nationalism, contribute to identifying and protecting national heritage (Fuchs, 2014; Rajadhyaksha, Radhika, & Tenkayala, 2013). By Kanzaki Sooudi (2012) this nationalistic attitude is something of the past, but you can argue that this aim is still determining cultural policies despite the rapid growth of the Indian contemporary art market.

After its independence India had to start from scratch defining their concept of art and creating cultural policies in order to make India a country of their own again, developing Indian cultural policy to create, shape and bring back Indian culture. For that reason the Indian cultural policies, but also Indian art and Indian art institutions have a strong nationalistic notion to them leaving almost no space for Indian contemporary art. A reflection of this nationalist policy can be seen in the number of museums that has been built in India since its independence, but also in the sorts of museums that India is rich. After determining the date of establishment, but also the place where significant Indian museums are located, Fuchs (2014) shows that after the Indian independence the Indian government has indeed established new museums according to their cultural policies. Especially in the first decade of independence they established as much museums as were founded in the twenty year period that followed from 1959 to 1979 showing the commitment and determination of the new Indian government.

Although these developments sound promising for the future of the Indian art infrastructure, the museums researched by Fuchs (2014) are mostly focused on heritage and Indian archeology with only a handful that are there to promote the Indian contemporary arts. This is confirmed by Poulsen (2012) her findings: “The striking difference between the art worlds in India and Europe is the comparatively few art museums in India, […] the lack of museums in India subsequently has left a void […].” (p. 183). But the accusation that India does not invest in museums is too black and white. Because the Indian government does put an effort in creating a museum sector, since the day they were independent, but their notion of cultural policy is different. Although the promotion of Indian contemporary art becomes more visible in the current Indian cultural policies, this country still sees the preservation of the Indian culture as main goal of their cultural policies. So where in more artistically developed countries the number and state of museums is mostly a reflection of the current situation of the art infrastructure, in India they use their museums to bring their cultural policies into practice (Fuchs, 2014).

2.1.4 Art Schools

Where Western countries know contemporary art schools that have been established one hundred years ago, as with the museums, India’s number of art schools have recently started to develop (Fuchs, 2014), thanks to the rising appreciation for the artists profession. Before, children from the middle class were expected from their parents to learn a ‘real’ profession like engineer or doctor. But a shift has taken place over de last five years (Poulsen, 2012).

As becomes clear after studying the relevant literature, India as an art market is still struggling. Not only because of the lack of government support or the great poverty, but also because this country is only slowly developing a concept of Indian contemporary art. A concept developed outside the country by foreign galleries, international auction houses and non-residential Indians. This notion of Indian contemporary art is currently reaching the global part of India, a part as described by Nayyar (2012), but still has to make its way through. This lack of familiarity even reaches all the way through the Indian government that still has not fully included Indian contemporary art in the cultural policies. As the museum sector shows, Indian cultural policy serves the heritage preservation and the development of the Indian culture. As a result art schools taught students about traditional techniques and mediums, but not about modern art history, Indian contemporary art and the artistic context. The traditional view has still the overtone, but some educational institutions are changing.

As Nina Poulsen (2012) her case study shows, the Central University of Hyderabad's Sarojini Naidu School of Performing Arts, Fine Arts and Communication does things differently. Instead of teaching their students about the traditional Indian arts and crafts, they learn them about contemporary art and try to teach them the notion of artistic freedom and awareness. This shift in teaching has also reached galleries and other cultural entrepreneurs, resulting in them locating to near the art school. This makes graduated art students on their turn stay in Hyderabad, instead of moving back home (Poulsen, 2012). So where in the Western art world museums, and in The Netherlands galleries, have a central position in the artistic hubs, in India art school are becoming the essential middle point of artistic communities.

Although the shift from traditional arts education to more appreciation for, and thus more practice of, contemporary art in India has taken place over the last decades, the Sir J.J. Institute of Applied Art already profiled itself as teaching contemporary art since its establishment in 1935 in Mumbai. This institute was born out of the even older Sir J.J. School of Art that was founded in 1857 (Sir J.J. Institute of Applied Art, 2014), making it the oldest art institution of India, but is also received as one of the most prestigious art schools of the country (Martyris, 2002). Where facets of the art infrastructure in general are neglected in the significant literature, the art institutes and academies seem to be left out of the spot light entirely, while they have such an important role in the emerge of an art market, especially in India. Not only create these art schools in India cultural hubs, being the middle point of all the other facets (like galleries and ateliers), but they are the starting point of an artist's career and making it possible for an artists to develop. Where art fairs form the middle point of an art infrastructure (*See paragraph 2.1.6 Art Fairs and Biennales)*, the art institutions are the beginning and essential for the development of an art infrastructure, pleading for more governmental support for educational institutions in the field of contemporary art.

2.1.5 Art Journalism

The pieces of the art infrastructure as discussed above are crucial for the development of an art market. And although they make a significant difference within the art world all by themselves, it is the combination of all factors like galleries, museums and auction houses, that make an art market grow and sustain. But not only the physical institutions (people can visit to see or to buy works of art) create an art market, also the media surrounding these organizations contribute to its growth. As Shubik (2003) describes, for people to appreciate the arts, they need to be educated about it. So solely opening the first museum or gallery in Delhi, will not automatically attract visitors and thus make the art market emerge or grow. People also need to know about it via the news media, but also learn about its content through artistic magazines for example. So not only the organizations themselves play an important role in the art market, but critics and experts as well (Shubik, 2003).

In the West and other developed art markets, these critics and experts can make or break a new gallery or exposition. In the emerging countries, these critics have the task to educate the people about the arts and making them familiar with it. One medium to educate the people are the art magazines. These monthly magazines write on art related history, report on current or coming expositions and educate on different disciplines of art with the belonging artists through columns, reports and interviews.

Despite the great importance of these journals, within the field of cultural economic research, this medium has been neglected so far. Studying their background information does show some interesting facts. If we first look at the Western art world and its magazines, an interesting development appears. *Artforum* is an American art magazine founded in 1962, right during the time of the rise and blossoming of the Pop-Art movement in the United States (*Artforum*, 2014; Alexander, 2003). The rise of the European art market developing from France was marked by the establishment in 1925 of English art magazine Apollo (Apollo Magazine, 2014) and approximately seventy years later, in 1993 Australia starts publishing the art journal *ArtAsiaPacific* (*ArtAsiaPacific*, 2014), right when the Asian art market started to develop. The founding of the art magazines seem to take place in times of emerge or flourishing, pin pointing times of art market development.

The same development can be traced within the emerging art market of India. Although some small art magazines, mostly about Indian craftsmanship, already existed in India, the first Indian contemporary art magazine was founded in 1998 called Art&Deal. Established right at the beginning of the big gallery boom, this magazine reports on painting, sculpture, photography, print, new media, installation, film, books, architecture & design (Art&Deal, 2014). Also within the organization's description, you can find some interesting details. Where established Western art magazines are often accused of using such complicated terms and concepts that are not even clear for insiders, Art&Deal states that they want to help define important events, but above all want to provide content for insiders of the art world, as well as for the people who just entered this field (Art&Deal, 2014). They also want to make their content understandable for people who are not that engaged with the arts, but are interested. This underlines the educational function magazines like these have in art markets that have just emerged, to make the public familiar with the arts.

Art&Deal is not the only big art magazine in India. A few years later in 2003, right in the middle of the big gallery boom, Art *India* was founded. Where Art & Deal emphasizes their educational goals, Art *India* also states that they want to be “a leading forum for understanding visual arts in the country” (India Art Fair, 2014b) but seems to lay its importance with the promotion of the arts within India and with providing a platform for art critics and artists, something that was for a big part absent in India. The goals of Art *India* also show the spearhead of an artistic organization within an emerging art market. They want to promote the art in their country, something a magazine reporting mainly about art in New York probably does not need to do. And Art *India* wants to provide a platform, which was apparently not present, again what would have been present within the art market of New York.

Although it is hard to empirically measure the effect of these art journals on the art market, it is clear that they have an important place within the art infrastructure. Their establishments mark the beginning of the emerge of an art market or artistic segment (like the rise of Pop-Art in the American art market). And where these magazines in established art markets mainly criticize and select good exhibitions from the massive art supply, the same magazines educate and familiarize the people of less developed countries like India. A country in which traditional crafts are often seen as art, a country in which very few people outside the professional art network are familiar with the notion of contemporary art (Poulsen, 2012).

But this low awareness of Indian contemporary art is changing according to Indian lifestyle blogger Anandi Paliwal. Because contemporary art is more in the media (like on television, in newspapers and magazines) a growing part of the Indian middle class gets familiar with it:

> *“More people from middle and upper class are buying affordable art from for example college students, because they see it in the media (like a record sales at Sotheby’s covered by the news) and more often two parents are working, so they have more money to spend”.*(Informal conversation IAF 2014)

So art magazines and art journalism in general have an important role in transporting not only information on Indian contemporary art outside the artistic professional networks, but maybe also in making people in more traditional circles (Bharat) familiar with art. But this is not only established by psychical magazines, also by other mediums like art blogs and other internet platforms that have emerged the last ten years like the blog Art Scene India in 2006 and Indian art web shop Indian Art Collectors in 2005.

Apart from the online platforms that are rising and have risen over the last decade, it seems that people in India also have the need for professionals and experts to inform them about the Indian art market. Not per se to separate the wheat from the chaff (Arora and Vermeylen, 2012) in a world of art oversupply and 'crowd wisdom', but mainly to educate people about Indian contemporary art and pointing them at artistic events, making them more familiar with the Indian contemporary art market.

2.1.6 Art Fairs and Biennales

Appointed by the literature as most significant development and central factor in the international art world; the art fairs and biennales. Art fairs being organized every year and biennales organized every two years, these cultural contemporary art gatherings are thought of as most visited and discussed events (Van Hest & Vermeylen; Forth.) and even assigned the role as "most important institutions that have developed" over the last forty years (Velthuis, 2011). Events that only took place a few times a year in specific countries in the seventies, do now each year bring over three million people to their knees (Baia Curioni, 2012). What explains the tremendous rise of the art fairs and biennales in a relatively short period of time?

Art fairs are a phenomenon we have seen arising in the art world. Where biennales have often the elite status, the art fair is more its commercial little brother, with lower entry barriers and different visitation motives. An art fair is an annually returning event hosting the attending galleries that are often from all over the world. In order to get in as an artist you need to be represented by one of the attending galleries. As an art gallery, you subscribe as a willing participant, hoping to be invited by the art fair. 'Renting' a booth at the fair can be an expensive affair costing easily over 50.000 dollars. Participating in such a fair is therefore a well-considered decision, but can result in an amazing number of sales and high rates of visibility (Van Hest & Vermeylen, Forth.).

Where art fairs are yearly events with booths filled with galleries deciding on what artist they want to exhibit at the fair, the biennales are organized every two years and is a curatorial happing. Every edition a curator team is put together, who invite individual artist to create an event in line with their artistic vision and goals. The aim is to create cutting edge exhibitions where at the art fair the actual sales are the focus of attention (Van Hest & Vermeylen, Forth; Crane, 2009).

Other parts of the (international) art infrastructure like museums, galleries and auction houses have established their place within the art world. Especially art fairs are a relatively new development combining the esthetic and artistic elements with sales. Although fairly new, hosting an art fair or biennale adds popularity and prestige to the hosting country making such events even the signature of that particular country (Van Hest & Vermeylen, Forth). Even if a countries' art infrastructure is still in its infancy, hosting such an art gathering is possible and adds to the perception of your country as a potential art market, as the example of India shows. India's art infrastructure still leaves something to be desired, but the fact that their national capital (Delhi) hosts such an international highly valued artistic event, adds to the perception of India being an emerging art market. Not only adds it to the perception, it actually causes the art infrastructure to expand since international attention creates a buzz that actually brings important actors of the art world to come to Delhi causing again all sorts of externalities.

For the hosting country organizing an event like an art fair or biennale is beneficial, but why do galleries attend such event and why do people visit it? As stated before, attending an art fair as a gallery can cost ten thousands of dollars. They do not only have to rent the booth, but also pay the insurance for their works and transport them to the hosting country or city resulting in huge participation costs (Crane, 2009). They have to sell a lot of art works in order to get their investment back. So why would they attend an art fair? Because they are able to sell a lot of work in those few days. As Van Hest and Vermeylen (Forth.) describe, a gallery attending an art fair sees more costumers come by during the art fair, than in a whole year in their gallery in their country of residence. Participating at an art fair is in fact a huge part of their yearly income (Quemin, 2013). And not 'just' consumers come by the art fair booths, but also the wealthiest art buyers in the world (Crane, 2009). Not only a lot of potential costumers pass their booth during those days, being at such a prestige art fair or biennale is a great marketing tool. Art world actors from all over the world visit international art fairs, creating possibilities for the gallerists to expand their network and promote their gallery.

For galleries is attending at a fair or biennale a great opportunity, but for art consumers it can also be beneficial. It gives them the possibility to compare all sorts of works all under one roof. Where they need to visit different galleries all over town or even the country to get an idea of what is going on in the field, visiting an international art fair or biennale gives you an immediate impression of the activities in different art mediums and among different artists (Van Hest & Vermeylen, Forth.; Crane, 2009).

So where can we position the art fairs and the biennales in the international art market? As Van Hest and Vermeylen (Forth.) explain, the impact of an event like an art fair can be local or global. Although the attending galleries at the India Art Fair 2013 were still for 60% from Indian originality, it gets international attention and important actors from the international art world visit these kinds of events to share ideas, knowledge and information. This makes these events forums for all people involved or interested in the art world giving them access to different (niche) markets of the hosting country, while at the same time giving artists and galleries a platform to show their work (Van Hest & Vermeylen, Forth.). Being the event that all important actors in the art world visit, creating an exchange platform for everybody who is interested, functioning as scouting scene for (upcoming) artist and being the event that the whole world looks at when it is organized, you can only conclude that art fairs and biennales are not only extremely significant but nothing less than the middle point of the whole international art world. A middle point where all important actors and stakeholders come together.

So as it turns out, hosting such a significant art event adds prestige to you as a country and makes you for a few days (or months) the middle of the international art world, making them one of the most important artistic events for the hosting country and in the woldwide art markets. One of the reasons India is being perceived as an emerging art market is because it is the hosting country of two of these events; the Kochi – Muziris Biennale in Kerela and the India Art Fair. The Kochi – Muziris Biennale was India's first contemporary art biennale. 88 artists representing 24 countries were part of this biennale that was characterized by misfortune but also enthusiasm and positivism for the future. Art works were not installed on time, funding was withdrawn at the last moment and work was being vandalized. At the same time, visitors were extremely charmed by this biennale that had struggled to be there (Rhine, 2013). Its first edition was held in 2012 and the next will open this year.

The biggest event around Indian contemporary art is the India Art Fair. Because of the need to show the world what India has to offer in combination with the felt intimidation of the galleries wanting to make art more accessible to everyone, Neha Kirpal founded the India Art Fair (then called the India Art Summit) in 2008 in India's capital Delhi. This first edition attracted 6000 people and 34 galleries (Vermeylen, Forth.). Now the number of visitors is over 120.000 per edition and 91 galleries have represented their artists at the art fair last January (India Art Fair, 2014c; Rhine, 2012), making the India Art Fair the third most visited art fair in the world (Baia Curioni, 2012).

As a gallery or acknowledged art dealer you can participate in the fair in two ways. You either subscribe as a gallery for a general exhibition where you represent as a gallery a whole group of artists, or you sign in on a solo project renting one or multiple booths for show casting only one contemporary artist. As a gallery you pay an application fee of 5000Rs (63 euros) and per square meter booth rent another 21.500 Rs (270 euros) for a general exhibition and 20.000 Rs (263 euros) for a solo project. The sizes of booths vary from 24 square meters for a general exhibition and 18 square meters for a solo project, to 120 square meters and 36 square meters. Smaller galleries will pay for those few days around 6400 euros rent, but for the bigger galleries this amount can be over 30.000 euros. To these amounts you have to add another 12,36% service tax as per government of India Regulations (India Art Fair, 2014). Although no numbers were disclosed, some gallery owners told me that some foreign galleries were given discounts to the renting fee, to make it more attractive to participate in the fair as a gallery.

These numbers concern your participation as a gallery or art dealer in the India Art Fair, but you also have to pay the relatively high import taxes of 35% when transporting your art works into the country. You have to pay these taxes upfront before you enter the country, something that can function as a huge barrier for participating in the IAF as Vermeylen (Forth.) explains. The organizers of the IAF have tried to establish some policy exceptions that would allow the gallery owners to pay the import taxes after an art work has been sold (since you get the amount back anyways when you take back the art works to the country of residence) but until now without success (Vermeylen, Forth.).

It is hard to determine exactly what has caused the tremendous rise of the number of art fairs and biennales over the last decades, but I would like to argue that the digital age, and therefore the rising art democratization of art has a big part in this. As Arora and Vermeylen (2012) explain, the Internet has provided us with the opportunity to have a voice in almost everything. Not only can we be part of the artistic conversation (by expressing what we think is art and what is not), we are also able to create and promote our own art. This democratization, has resulted in an oversupply of art, but also in a great oversupply of opinion and 'expertise' on art. The biennales and relatively accessible art fairs have created a platform for all artistic stakeholders (Van Hest & Vermeylen, Forth.), resulting in the fact that now more than ever art experts spend their time on art fairs.

Besides the great over supply the rise of various art markets over the last decades are also supposed to have resulted in a huge increase in the number of art fairs and biennales. Not only do this countries on their turn supply art and art opinions, but these emerging art markets bring new demand into the market (Van Hest & Vermeylen, Forth.). Demand that is being met on international art fairs creating an overview for these potential buyers delivering big amounts of art.

Potential buyers have an immediate overview of what the art world is offering with a quality assurance since the art that is being displayed has made it through various stadiums of 'quality checks'. Not only are the artists and their works selected by acknowledged art galleries, these galleries are on their turn again selected by the concerning art fairs. So buying a work of art on an art fair or biennale gives you a sort of insurance of quality in a world of great art oversupply. The art fair has also created a platform for the artistic conversation. The art fair gives you an overview of the current state of an art market, drawing various important actors from the museum sector, but also from the galleries and other artistic fields to the fair starting up a conversation of opinions and exchange of art expertise.

But if an art fair or biennale is for a certain period the middle of a certain art infrastructure, how are these events able to rise in countries with a small to no art infrastructure, like in India? In this case, the question is also the answer. Where galleries need a strong network in order to establish themselves, art fairs can be organized from scratch, creating this space full of art works, attracting important players, buyers and art lovers to this temporary center of (contemporary) art. Art fairs and biennales need much less art infrastructure in comparison to galleries or auction houses, in order to organize a successful and significant event and to be the middle point of all artistic attention.

2.1.7 Role of the Indian government

Reading the literature and news coverage on the Indian art market, a general dissatisfaction is noticeable about the role of the government in the Indian art market, or better the total lacking of it. Although the development of the Indian museum sector tells us that this is also a matter of definition (the Indian government does have extensive cultural policies, but these are focused on heritage preservation), the Indian government is only involved on a small scale or not at all.

Let us first shortly look in what form the Indian government is involved in the Indian art market. As stated before, although these museums do not per se promote contemporary art, over the last decades museums have been founded all over the country (Fuchs, 2014), including a few that do have the function to promote contemporary art. A new contemporary art museum is about to get build in Kolkata, for a big part financed by the national and local authorities (Harris, 2011). Other institutions are also connected to the government like high profiled museums (like the National Gallery of Modern Art in Delhi) and art academies (Lalit Kala Akademie also located in Delhi). And searching the website of the Indian Ministry of Culture shows that even special scholarships for Indian art students are available and that the government is working on a plan to digitalize Indian museum collections (Ministry of Culture, Government of India, 2014).

Although this seems to be the right way to go for the Indian government, the skepticism in almost all relevant literature makes you believe otherwise. Azhar (2011) also acknowledges some of the effort of the Indian government, but mainly focuses on the lack of their involvement illustrated by the absence of relevant definitions. The word gallery for instance is not legally defined (Azhar, 2011) and Rajadhyaksha, Radhika and Tenkayala (2013) point at the fact that since the Indian independence the country has been struggling with defining the concepts of art and culture in general. This lack of definition seems to have their consequences in practice. A relatively low number of governmental initiatives in the field of culture are being executed, governmental financing fails to occur and government legislation within this field is obstructing the growth of the Indian art market. As the paragraph about art fairs and biennales explains, participating in the India Art Fair is a costly affair due to the extreme high import taxes of 35%, a number that is much higher than in surrounding countries (Vermeylen, Forth.). Not only creates this a barrier for galleries to participate in the India Art Fair, but since these taxes will be partially passed on to the consumer, buying a work of art becomes unnecessarily expensive . Putting some effort in, as a government, understanding the Indian art market (its potential and its barriers), would lead you easily to conclude that changing the import regulations concerning foreign galleries, would affect the Indian art market for the best.

It seems that the government has a lot to learn, but is also making small and slow steps in the right directing by founding museums, acknowledging contemporary art and formulating their cultural policies. Defining artistic concepts will be the first step to develop cultural policies and to stimulate the Indian art market instead of obstructing it.

2.2 The Indian art consumer

We have taken a look at the Indian art infrastructure facets and seen the enormous significance, essentialness and interdependent nature of every art market segment. Although every single one of these segments is of great importance for the emerge, sustainability and growth of art markets, within this global world of international trade and digitalization it seems that the art fairs have taken a central position. This event creates an overview state of the field providing at the same time a quality check and forms a platform for worldwide art professionals. These central events attracts on a yearly bases three million visitors. And although we have an image and character description of the general art fair visitor, who is walking around every year on the India Art Fair on the contrary is unknown. In fact, the identity of the Indian art consumer in general is unknown. Although no scholars have looked into this gap, some suggestions about the identity of the Indian art consumer have been made.

When you look at the growing art market from a monetary perspective, often the new group of Indian millionaires is held responsible for the enormous growth of the Indian art market. Although I plead differently, the art markets are often looked at in terms of level of sales and total sales over a whole year (TEFAF Art Market Report, 2014). Sales that are mostly only put aside for the most fortuned among us and draws the most acknowledged organizations, like Christie's, to those great selling countries. They held their first auction in India last year because they wanted to aim to tap 'the bidding market for prestige purchasing among the country's fast-growing ranks of millionaires' (The Guardian, 2013).

This millionaire Indians do not only live in India, but also abroad. In colonial times, a lot of Indian migrated to North America and Europe and were not fully recognized by the Indian government as Indian citizens. This changed in the late seventies when the Indian government came with the Foreign Exchange Regulation Act (FERA) acknowledging the non-resident Indian (NRI). From that moment on, it was easier for the NRI to invest in their home country what made them connecting India to the world economy (Amrute, 2012). This group of newly risen Indians are entrepreneurs and business men (Kanzaki Sooudi, 2012) and are also supposedly richer than the Indians living in India.

Although people often talk about high numbers when talking about art sales and a growing art market, the upcoming and growing middle class of India is also thought of to have caused the Indian art market to rise as fast as it did and is still doing (Van Hest & Vermeylen, Forth.; Vermeylen, forth.; Poulsen, 2012). The economy is growing in India, a phenomenon mainly the middle and upper class benefits from (D'Costa, 2012), creating more jobs causing people to have more money per household to spend on luxury goods and family trips. This in combination with rising familiarity (through the media) with the arts, causes people to engage more with the arts by buying works of art, but also by participating in cultural activities like visiting museums and art fairs.

And especially for that last development I want to raise more awareness of its significance. As mentioned before, the growth of the art market is measured in sales and the amount of sales. From an empirical standpoint, this is perfectly understandable, since participation is harder to measure that international sales. But an art market is not only growing because of high sales at auction houses or galleries, but also because the population engages with the arts. You cannot speak of an emerging art market simply because the millionaires are buying art while at the same time the rest of the country does not even know what the concept of art means. A growing art market means emerge or development of all chains of the art infrastructure, meaning that the 'normal' population also contributes by engaging with the arts.

2.3 Audience studies

Until fifty years ago participating in, or attending at cultural activities was seen as solely reserved for the upper classes. Only the highest in society went to see the opera, visited art exhibitions and attended classical concerts, due to financial means but also because they owned the terminology to appreciate and understand the 'higher' arts (Bourdieu, 1984). After a slow (and still happening) democratization of the arts, people from other social layers had the time and the money to spend their free time in a museums or the concert hall. This development, in combination with the more recent development of economical cut backs, have increased the interest in audience studies substantially. Not only do academics want to know who visits museums and attends classical concerts for the sake of knowledge, but also cultural organizations themselves want to know what kind of audience they attract in order develop efficient marketing campaigns ensuring their future existence (Fischer, 2009; Jansen – Verbeke & Van Rekom, 1996). This has resulted in a huge amount of research into this field, of which Fischer (although her focus on popular and classical music) has created an overview of the last few decades (Fischer, 2009).

Since the field of audience studies has a history of decennia in the Western society, research questions of current researches have a more complex nature. As a museum, knowing that your audience predominantly exists out of young, high educated, white women is not enough anymore to ensure your survival as an institution. More complex questions about visitor's identities (Falk, 2009), what they (want to) experience during this visit, and what people are willing to donate to a specific organization have to answered, the latter in the current context of the need for more cultural entrepreneurship (Fischer, 2009).

In recently developing art markets, as the one in India, answering the above questions is not yet a relevant issue since not even the basic information (like demographics) is known yet. How old are the people who visit contemporary art fairs in India? Do predominantly Indian inhabitants visit contemporary art galleries, or are these Indians who live abroad, the so called non-residential Indians (Amrute, 2012)? And what is in general the highest education received of people who visit museums?

2.3.1 Art infrastructure segments and research methods

Whether we talk about the museum sector, or the world of the performing or visual arts, studying and therefore knowing your audience is relevant for several reasons, as we have seen. The extensive literature within this field testifies of that. The more stricking is the fact that hardly any literature on art fair visitors available. Most audience studies relate to museums (Falk, 2009; Jansen – Verbeke & Van Rekom, 1996; Ashworth & Johnson, 1996), performing arts (Fischer, 2009) or cultural tourism in general (Jansen – Verbeke & Van Rekom, 1996). But there is a big gap in the literature because of the lack of audience studies in the field of galleries and art fairs. So not only will this master thesis provide a basis for further research on the Indian art consumer, but will also be the starting point for studying the art fair visitor in The Netherlands and surroundings.

The two most common methods in audience studies are the interview and the survey, either one of those two, or combined. Marjolein Fischer (2009) for instance has used a carefully developed extensive survey in order to discover people's demographics, motives and willingness to pay for (the existence of) pop and classic concerts. Surveys can also be combined with interviews to get a more in depth image of the visitors you are researching, creating better understanding or their ways of thinking, but also about their real motives behind a museum visit, motives you might not discover only by conducting a standardized survey. Jansen – Verbeke and Van Rekom (1996) used this method, combining conducted surveys with thirty in - depth interviews according to the laddering technique. This technique, a structured questioning technique (Corbridge et al., 1994), requires question after question, concerning one answer, really trying to get behind the actual meaning and motive behind human behavior (Jansen – Verbeke & Van Rekom, 1996). Although such in depth methods make interesting facts surface, we first need to know the basic demographics as manner of starting point for exploring the rest of the Indian art consumer.

2.3.2 Visitor demographics

Various demographics have proven themselves to be relevant, and seem to be part of the art consumer or determine whether a person participates in cultural activities. One of the demographics received to be of great effect on a person's art interest and participation and on general art demand is the level of education (Lévy – Garboua & Montmarquatte, 2011; Van Eijck & Van Oosterhout, 2005; Johnson 2003). 'The greater one's amount of educational capital, the higher one's chances to participate in high-cultural events and the higher one's frequency of participation' (Vander Stichele & Laermans, 2006, p. 58). Not only are people with higher education more likely to come across culture in their own families and homes (since they live in higher societal layers), they also are more likely to have some sort of art form in their school curriculum. Experiencing art multiple times in your life makes it more likely you keep participating; learning by consuming (Lévy – Garboua & Montmarquatte, 2011, Bourdieu, 1984). Thus art consumers are in general highly educated people, since they are able to make sense of highbrow art and culture (Van Eijck, 2000). This raises an interesting question in relation to India. It is known that a huge part of that country lives in extreme poverty and that although children until the age of 14 have the right of free education and school supplies, still a relatively small number of Indian children goes to school and completes a secondary of tertiary program. Knowing the level of education of the visitor of the India Art Fair can therefore tell you immediately something about the impact of this fair.

Age is also a demographic that characterizes some parts of the cultural sector. Gallery and pop concerts visitors are often thought of as young people, while at the same time classical orchestra's and opera companies are struggling with the fact that their audience is dying out. India as an economy is emerging the last few decades with an extreme rise over the last ten years. The relatively young people grow up in a growing economy granting them more access to education and art. Does this mean that the visitors of the IAF are in general young or does the art fair attract all sorts of age groups?

Another very interesting subject and determining for the demand for art, would be the (average) income of the visitors (Lévy – Garboua & Montmarquatte, 2011; Johnson, 2003). Does the fair attract predominantly the new group of rich millionaires as much of the (journalistic) literature suggests or also people with lower wages who are just interested in art? As interesting as this might be, I consciously decided not to include a question about income in my questionnaire to respect the request of the organizers of the IAF to be discrete during my survey and to respect my participants by avoiding any uncomfortable situations.

The literature combined with the acquired knowledge over the last four years of my academic study, I have included the relevant demographics in the survey, demographics that will reveal an image and profile of the Indian art consumer which can be under the following categories:

- External Characteristics
- Education
- Motivation
- Cultural Participation

2.3.3 Visitor profile

Various studies on art audiences have provided us with valuable insights on visitors from all artistic disciplines like the performing arts (Fischer, 2009), the museum sector (Falk, 2009; Mason & McCarthy, 2006; DiMaggio, 1996) and galleries (Mason & McCarthy, 2006). They have shown us important characteristics, motivations and behavior of different kinds of art consumers.

Besides cultural economics, another field that provides us with interesting insights is the (cultural) sociology that has studied people's behavior, preferences and tastes for years, creating the descriptions of life styles and consumption patterns from different generations and societal layers (Greenberg & Frank, 1983).

Greenberg and Frank (1983) have studied the interests, needs, demographics and television viewing behaviors from over 2400 American respondents of 13 years and older, to see whether similar patterns of interests appeared. These patterns resulted in 14 segments each representing a certain societal layer with belonging life styles and general characteristics.

Although they had an extensive amount of statistical data, Greenberg and Frank (1983) were able to translate these numerical data into relatable descriptions, a study that is highly conductive for this thesis. Analyzing these constructed segments surfaces internal and external characteristics (*See paragraph 3.2.3 Data Collection; Internal and External Characteristicss)* that according to Greenberg and Frank (1983) categorize their respondents into groups. Seventeen determining characteristics can be filtered from their fourteen segments namely; age, race, sex, education, income, marital status, place of residence (rural or urban area), religious interests, sort of work, (scope of) activities, needs (for certain accomplishments, personal growth or social ties), interests, (un)traditional mindset, (not) having children, social origins (high or low income families), active/ passive lifestyle and television watching behavior. These characteristics of the respondents have resulted in fourteen segments (covering male, female and youth), all representing certain lifestyles focusing on outdoor life, family, culture, indoor activities, social isolation and eagerness for news and information.

Studying consumption patterns and cultural life styles, a concept you cannot circumvent is the 'cultural omnivore'. Were first the elite among us distinguished themselves by appreciating and participating in high culture like classical music, the opera and contemporary art, now the new generation of high educated people mingle in both low and high perceived art forms as 'the expression of personal qualities' (Van Eijck, 2000, p. 208). Van Eijck (2000), highlighting Peterson's plead to categorize people according to cultural classes rather than status groups, has studied these cultural omnivores attempting to cluster taste patterns and segment audiences again giving great importance to characteristics like the much-discussed concept of taste, education and the division of leisure time as Greenberg and Frank (1983) did. However, he describes the importance of the (changing) society in the shaping of taste and cultural participation of people, emphasizing social phenomena like societal mobility and the rise of new generations to enable the cultural omnivore to rise among the higher status groups, a significant factor Greenberg and Frank (1983) seem to neglected to a certain degree.

Again mentioning the characteristics as education and income as significant factors determining cultural participation and cultural consumption patterns, Van Eijck and Van Oosterhout (2005) explore the two segments of the elite class defined by Bourdieu (1984) namely the cultural elite with a relatively low income, but high education and cultural involvement on the one hand, and on the other hand the economic elite, with a relatively high income but with less commitment to the arts; two segments of which the boundary is probably blurring (Van Eijck & Van Oosterhout, 2005), a fading of boundaries that is also identified by Fischer (2009) in the field of opera and classical music. From over 9000 respondents spread over the years from the period 1975 till 2000, activity diaries together with a survey are analyzed to find that the relation between material and cultural consumption has declined. Since they looked at this materialism, they included material possession as variable, but again use characteristics (or as Van Eijck and Van Oosterhout (2005) call it, basic background indicators) as education, income, occupation, leisure activities and cultural participation in order to establish a person's lifestyle. And although Van Eijck and Van Oosterhout (2005) have shown that education and income are having less effect on the consumption pattern than before, these and the other characteristics are still the starting point of creating segments or categories of consumers (of the cultural sector) for most researchers.

As for Vander Stichele and Laermans (2006) who, despite the conclusion of Van Eijck and Van Oosterhout (2005) the year before about the declining effect of education and income, found that education and income are the main determinants for cultural participation. They have even created a model of the cultural participation patterns, showing us six clusters with on the y-axis the level of education (low, moderate and high level) and on the x-axis (not income) but age as determining factor (Figure 1). This model exists out of six clusters all representing a group with a certain frequency of cultural participation, depending on their level of education and whether they are part of the younger or older age cohorts:

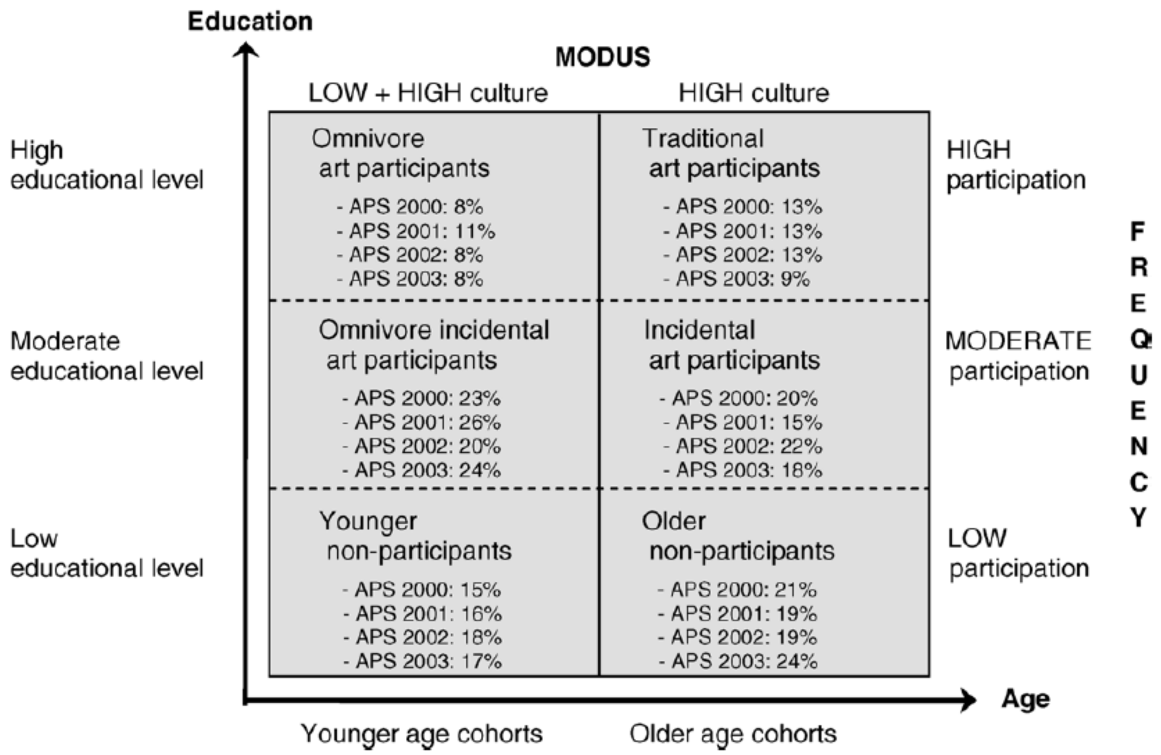


Figure 1: Exploratory model of cultural participation patterns in Flanders; Vander Stichele and Laermans (2006)

Young people with high level of education are identified as 'omnivore art participants', this in line with the findings of Van Eijck (2000), while older individuals with a moderate education level are called the 'incidental art participants', due to their incidental visiting behavior.

Because of the lack of audience studies on art fair consumers within the field of cultural economics, this research had to get its literature background from other art sectors (museums and theaters), and from other research areas. One of the fields that did valuable research into art consumers is the cultural sociology showing us who the general art consumer is, and what variables are determining is the cultural consumption pattern of people.

So, who is the cultural art consumer? What do we know about the profiles of art consumers so far? Studying the literature the first general characteristic of the art consumer (not per se art buyer, but also the person who participates in arts and culture) is a high level of education. This often goes together with being positioned in higher societal layers, having a higher income and being in high status jobs (Fischer, 2009; Van Eijck & Van Oosterhout, 2005). This image of the art consumer changes a little when you divide the arts into the higher and lower perceived ones, and changes even more when you talk about the art buyer solely.

Although not fully applicable to our current society anymore, the art consumer can be divided in two groups (Bourdieu, 1984); the cultural elite, who are indeed highly educated, but have a relatively modest income and the economic elite who have a high income, while at the same time a preference for the more traditional art forms. The last group has been labeled the last two decades as cultural univores (Van Eijck, 2000), a group that is only interested in the higher forms of art (or only the lower forms). On the opposite side is the cultural omnivore defined by Peterson (1992), representing the group of people that participates in both high and lowbrow art. This group is characterized not only by high education, but also by a young age. The older generations were born in a certain social environment, which was harder to escape. Due to social mobility, the younger generation is able to rise in society liking both high and lowbrow culture (Van Eijck, 2000). Besides these two profiles of the cultural consumer, there is a third one, namely the art buyer, who is also relatively young and highly educated but only interested in buying art either for the sake of decoration or investment. It is not clear though whether this group can be associated with the economic elite defined by Bourdieu (1984), or that this group does have no affinity with art what so ever and only cares were their money goes, since there is research done into the art buying process but not in the buyers profiles.

When you connect the current literature, three 'sorts' of art consumers can be defined. First Peterson's cultural omnivore who is relatively young, highly educated, has a modest income, but is interested in various sorts of art whether defined as low or as highbrow culture.

The second group is also interested in art, but has a very traditional taste, often only appreciating highbrow culture, known as having a univore taste. This art consumer is from an older generation, has a higher income and can be connected to Bourdieu's (1984) definition of the economic elite, as opposite consumer to the cultural elite (the first defined group in this paragraph). The literature is often constraint to only comparing and opposing these two art consumers, but a third one cannot be ignored anymore in today's society and international art worlds; the art buyer. This person is located in both the younger and older generations, and has a relatively high income. This group tends to have no affinity with art in particular, but buys for investments, status enhancement or for decoration purposes, explaining why this group has been left undiscussed in the art consumer literature.

The literature gives you an impression about the characteristics of the art consumer, but these researches are based up on Western societies. Will these characteristics also apply for the upcoming art consumer in India? While Van Eijck (2000) describes the cultural omnivore and univore, Greenberg and Frank (1983) have developed 14 segments of lifestyles and Fischer (2009) has provided us with characteristics of the pop music and opera visitors, this master thesis would like to take it a step further by translating empirical data into an actual visitor profile describing four types of India Art Fair visitors making it easier for the reader to relate to these types of visitors and to get an actual idea of the India art consumer.

3. Methodology

3.1 Quantitative research

Within academic methodology the first broad distinction that can be made is the one between qualitative research and quantitative research. According to Bryman (2012) quantitative research can be described as the collection of numerical data in order to create an objective conception of reality. 'Qualitative research on the contrary emphasizes words rather that numbers' (Bryman, 2012, p. 380), by studying a specific event, certain situation or a concerning company allowing the researches to go in depth within one specific area and gathering greater knowledge about it. These two different approaches bring different methods with them. In order to create greater understanding about one specific artistic quarter for instance (being a qualitative research), conducting (semi) structured interviews with gallery owners, buyers and visitors would provide you with the necessary information. To create a visitor profile or map the international art prices through quantitative research, methods like questionnaires or analysis of secondary numerical data are customary. Where qualitative research has as main goal to understand a certain event and gain greater knowledge about a specific field, quantitative research is conducted in order to generalize the results to a whole sector, field, land or world.

This research into the emerging Indian art market and the characteristics of the visitors of the India Art Fair will be mainly of a quantitative character. Besides an extensive literature review and secondary data analysis, a survey by questionnaire among the visitors of the India Art Fair 2014 has provided the data for this thesis. But this thesis gives the great opportunity to combine the quantitative nature with qualitative aspects. The Indian art market and Indian art consumer is researched in general, based on quantitative statistical data, but the fact that the sample exists out of 200 participants makes it possible to go more in depth with one visitor and combine quantitative data about demographics percentages, with informal conversations with different people from the field.

3.2 Method

3.2.1 Survey

The words survey and questionnaire are often used interchangeably, but are in fact two different concepts. Where the survey process is there to describe a certain aspect of the population, the questionnaire is a tool within this process. So in order to create a visitor profile through a survey, a research method that has enjoyed a steady popularity in onsite audience studies (Roose et al., 2002), a questionnaire is conducted among the visitors of the India Art Fair 2014. But not only conducting the questionnaire and reaching your ideal sample size is a challenge, also the composition and creation of this questionnaire is a difficult task that requires effort and time.

3.2.2 Biases

As Rizzo (2006) shows us, especially as part of the contingent valuation method (CV), a questionnaire, or the responses to these questionnaires, can be full of biases. Since you only ask people hypothetically what they would be willing to pay for the preservation of heritage (Fischer, 2009; Rizzo, 2006), you never know if your respondent gives you an honest or realistic answer. So the respondent might state in a survey that he would donate 100 euros for the restoration of a specific church, resulting in the municipalities or the government to invest in it, but at the end, he or she does not donate any money making the participant enjoy the church for free, also known as the free rider problem (Cuccia, 2011). People could also feel obliged to give a morally correct answer, instead of an honest one or state their donation without taking their actual budget in mind (Fischer, 2009). This is known as the hypothetical bias.

These biases occur while conducting the questionnaire, but biases also appear in the period prior to the actual onsite questionnaire namely in the sample selection. Before you survey a certain target group, you need to know this group. Does the group predominantly exist out of elderly or for a big part out of young people? Based on these insights you create a sample framework as guideline through your survey process. Does the population exists out of 80% people older than 65 years and only 10 percent out of people under the age of 25, and does your final sample shows over 60% people younger than 25 years old, you are dealing with a selectivity bias damaging the validity of your results (Fischer, 2009; Roose et al., 2002).

Since the questionnaire within this thesis does not concern people's willingness to pay (WTP) and the composition of the sample group is totally unknown, the above biases are less likely to occur. What should be kept in mind is that people might give answers to you they think are expected from them. Instead of being honest about their frequency of cultural activities, they say they participate more in cultural activities than they actually do what might add to their perceived status or cultural capital. This is called Socially Desirable Responding (SDR); 'the tendency of people to give a positive self-description' (Paulhus, 2002, p. 49). This can either be done unconsciously when people are convinced of this self-image, or consciously when respondents want to give the people around them (or the person conducting the questionnaire) a different impression of themselves (Paulhus, 2002).

Where for instance the free rider bias is consciously and strategically applied by the respondents (Cuccia, 2011), SDR is a psychological construct with a great unconscious element. Therefor the free rider bias can be partially overcome by different formulations of questions in your questionnaire getting to the honest answer by a detour. SDR is harder to overcome by adaptations of your questionnaire. The key in overcoming socially desirable responses, thus responses that interfere with reality (Paulhus, 2002), is to make your respondents feel comfortable, accepted and above all respected. If you approach people with a pejorative attitude giving them the feeling that you should appreciate art in order to be respected by you, they are more likely to give SDR making your results useless. But if you talk to people in a respecting manner and making them feel comfortable, you will get more honest answers since people feel less pressure to meet your expectations.

Whether your approach during your questionnaires worked is of course hard to empirically measure, and it stays difficult to 'prove' whether people are telling you the truth. But the fact that as much people told me that they participated in cultural activities less than once a year, as people who participated multiple times a month does tell you that at least half of the people did not feel pressured to tell me that they visited galleries and museums more than once a month. The same applied for the question asking people their motivation for visiting the India Art Fair. Some people told me that their main motivation was to buy a work of art, but others laughed at that motivation telling me that they did not have that amount of money. The first group of people showed almost no snobbism and the second group seemed not the be ashamed that their income did not allow them to buy a piece of contemporary art. This leads me to conclude that the questionnaire developed and the attitude during the conduct of these questionnaires have lead people to give relatively honest answers.

3.2.3 Data Collection; Internal and External Characteristics

The frequency of taking part in cultural activities or the motivation to visit a cultural gathering like the India Art Fair is a human characteristic. This characteristic is not noticeable from the outside and often formed over the years. These kinds of features are called internal characteristics. You cannot detect them from solely observation and they are formed (often during years) by the individuals themselves. Characteristics that are visible from the outside are the characteristics that stick with individuals like sex and race, called external characteristics. But not all external characteristics are observable from the outside, like education and sexual orientation. These characteristics stick with an individual, determining him or her for a life time, but are not visible from the outside (Langeveld, 2014).

The questionnaire used for this research included external as well as internal characteristics. Although external characteristics of art fair visitors might seem obvious, the Indian art market is still in its infancy and thus lacking any basic information about the India art fair visitor (and even about the Indian art and culture visitor in general). Within this questionnaire I included the following external characteristics: sex, age, nationality, country of residence and education. Although the India Art Fair is known for attracting quite a number of children as well (accompanied by their parents or with their school classes),I decided not to include them in my sample since they might not have yet received their highest education, have no individual motivations to visit and no financial assets to buy a piece of art. Therefore this questionnaire starts at the age of 20, forming age groups of nine years, ending with the age group seventy years and older.

Also an external characteristic, but not observable from the outside is nationality. The India Art Fair profiles itself as an international art fair attracting partners, galleries and visitors from all over the world (India Art Fair, 2014c). To see if this is really the case I asked people about their current nationality. Since this nationality does not always correspond with the country people live in at the moment, I also inquired about the country people were a resident at the moment. If the participant lived in India, I included the state they lived in. This way it might become visible where most of these Indian people come from within their own country also telling us something about the state of the Indian art market in general. And if this corresponds with the perceived cultural cities in India, or whether there might be a shift going on.

The last external characteristic included in this questionnaire was education. Starting from primary school on, to a PhD or higher, people where asked about the highest education they had received so far. Since the educational system works different in every country, overall educational levels were formulated. After primary school and high school, Indian citizens/ children can proceed with their education to a higher level and even to University level. In order to create educational levels within the questionnaire that would apply to participants from all over the world, I called the education after high school 'Community College' according to the American model. If you go to a higher educational level in India, you go to University as in the Western system. Within this university level, I made a distinction between a bachelor's degree and master's degree. Art academies in the Netherlands are categorized under 'higher' education. In India on the other hand, as in a lot of other countries, art academies are on a university level making graduated art students an owner of a bachelor or master degree on university level.

Internally formed characteristics, conveyed by actions and words are internal characteristics. Due to the early state the development the Indian art market is in, there is a lot of need for basic information on Indian consumers of art. Therefore I implemented questions about people's external characteristics. But if a visitor profile is created based on that information, you still remain with some questions: 'Why do people visit an art fair?' and 'Do they have the intention to buy a piece of art?'. Questions that are, in the context of India, still unanswered.

The first question about internal characteristics asked in the questionnaire is about motivation. Why did the participants decided to pay a visit to the India Art Fair 2014? When formulating the multiple choice answers to this question, three groups of potential visitors where envisioned: The (Artistic) Professional, The Art Lover and The Art Buyer. These visitors can have the following visitation motivations:

- To look at the works of art
- To be part of the atmosphere
- To network
- To buy a work of art

The first two motivations will come along with visitors who are there as an art lover, with no intention to buy or to promote themselves. The networking motive will apply for artists who want to promote their work among galleries or fellow artists, but will also be the main motivation for a lot of professionals of the art world; you can think of art dealers, museum curators and collectors who want to expand their network for future purposes. If people had different reasons for their visit, they had the option to pick the box 'Other' and explain their differing main motivation. Not only is it interesting to see why people visit the art fair, but also whether this visit is their first or if they have visit the India Art Fair before. In the questionnaire this question could be answered with a simple yes or no.

Although participants were already asked if their motivation to visit was mainly to buy a piece of art, the questionnaire asks again if the visitor had the intention to buy something, when they saw something appealing. This might seem an useless question after asking already if their motivation to visit was to buy something, but not everybody with the intention to buy something has that particular main motivation to visit. People's main motivation can be to network, or to see the works of art, but at the same time have the intention to buy something they like. To get to know whether a specific artistic medium is favorite among the India Art Fair visitors, I asked also what kind of art work they would buy, if people had indicated that they had the intention to buy a piece of art. This question is not only asked out of curiosity but also to see whether the (Indian) visitors are already open to unconventional mediums like graphic design or digital art.

The questionnaire was concluded with the question: 'How often do you participate in cultural activities?'. Since 'cultural activities' is a very broad concept, a few example were added as way of illustration like visiting a museum or gallery, or attending a theatre play. The participant was again presented a small list of multiple choice answers:

- Multiple times a month
- Once a month
- Once per quarter
- Once a year
- Less than once a year

Not only give the answers to this question a general overview ofhow often Indian art lovers attend cultural activities, but also if the Indian Art Fair can weight up against other cultural gatherings (if people visit often galleries, museums and other fairs, as well as the Indian Art Fair, this event measure itself with the rest), but also if this fair is perceived as accessible. If people normally do not visit galleries, museums or theatres, but are comfortable enough to visit the India Art Fair, this means that this art fair is accessible.

The artistic visitor

Although not included in the questionnaire beforehand, but what turned out to be quite significant is the fact that a lot of visitors were artists themselves wanting to network on the one hand, and on the other hand get inspired while seeing what was going on in the contemporary art world. Since I discovered this right at the beginning of my questionnaire, I was able to note separately whether the participant was an artists and what kind of artists he or she was. Although most participants were eager to tell that they were an artists themselves (and insisting on taking their business card), these results are not 100% reliable because this question was not implemented in my questionnaire. Therefore they will not be part of my results visualized in charts and tables, but will be a valuable addition to the view on the India Art Fair visitor.

Informal conversations

Some of the questionnaires turned out in small interviews, or informal conversations containing a lot of interesting insight in the India Art Fair, but also in the Indian art market. I talked to artists, art loving visitors, gallery owners from abroad, journalists, government officials and museum personnel who all gave their view on the current state of the fair and the (international) art market. I noted all these comments on the back of their questionnaire form including their profession or connection with art. Their comments will be used to enforce the theory in this thesis and illustrate certain events either implemented in the text or as illustrating quotes.

Location

The questionnaire was held among the visitors of the India Art Fair 2014 on the NSIC Exhibition Grounds in the new part of Delhi. These grounds, although located between the poorest quarters of Delhi, hosts all kinds of domestic or international fairs, events and exhibitions (NSIC, 2014). Since 2008 this empty field is yearly covered by three enormous halls welcoming over 90 galleries who show the best of their art and artists (India Art Fair, 2014c).

During the conduction of my questionnaires I positioned myself in front of the VIP Lounge (my back facing towards the VIP lounge entrance) were people could get something to eat and drink and take a rest. This had no influence on my sample since my position was in the first hall, rather at the beginning of the fair. This loop was in the walking route most people took to see all of the galleries, a loop everybody passed through, not only the people who wanted to enter the VIP lounge.

Sample

Every year the India Art Fair manages to attract more and more visitors. Although no official numbers have been released yet, the rumor has it that this year the fair had over 130.000 visitors. Looking at this number and considering that the fair took three days to conduct these questionnaires, keeping in mind that the questionnaires would be conducted personally, the goal of around 150 participants was set. As in Roose's et al (2002) article, the audience of this art fair is unknown, so creating a sampling frame was impossible. By varying in time and carefully deciding my position on the fair, the aselectivity of my sample collection was maximized. The first opening day was for VIP visitors only, attracting mostly presumable high respected players of the (international) art world. In order to prevent any biases, on this day no questionnaires were conducted. At the end of fair I managed to talk to over 200 people, enlarging my initial sample of 150. The participants included in the sample were approached randomly as they walk by me through the loop I was positioned.

3.2.4 Data Analysis

After collecting 205 filled-in questionnaires, the data found in these questionnaires were implemented in the Windows program Excel. Every participant was seen as a unit. Five units were excluded from this sample because of incomplete or unclear data contaminating the overall results. So this research had a total amount of 200 units with nine or ten variables, depending if the visitor had the intention to buy a piece of art. When this question was answered with a 'yes', then they were asked what kind of art work they wanted to buy. People who answered with 'no', that last question was not applicable, so they answered one question less.

In the questionnaire developed for this research the participant had thus each nine or ten variables with different measurement levels that can be categorized under nominal, ordinal, interval or ratio measurement levels (Bryman, 2012).

Nominal Scale

Within this measurement level the variables only differ by name, what is also the only way to classify these variables. In contrary to for example to the ordinal scale, these variables cannot be put in some kind of rang order from high to low, better or worse, good or bad. Example of variables on the nominal scale are sex, ethnicity and language. You cannot say that one sex is better over the other, or that speaking a certain language is of more value that another (Bryman, 2012). In this research the variable that can be categorized under the nominal scale are sex, nationality, country of residence, motivation to visit, the answer to the question whether they had visited the India Art Fair before, if they had the intention to buy something, and if this was the case, what kind of art medium they were most likely to buy.

Ordinal Scale

Variables in the category ordinal are able to be ranked, but there is no degree of difference between them. An example of such a variable are answered coming forth out of a Likert scale like agree, totally agree, do not agree at all, et cetera. Although you can rank these answers from totally agree to do not agree at all, there is no specific distance between these each of these answers. The distance between not agree at all to not agree, is not per se the same as the distance between the answers agree and agree a lot (Bryman, 2012). In this questionnaire the ordinal variables are education and the frequency people participate in other cultural activities.

Ratio Scale

When you can talk about a certain degree of difference between the data, you talk about an *Interval Scale*. The degrees of Celsius would be of interval scale since between every degree there is one degree Celsius but this does not mean when it is twelve degrees Celsius it is double the temperature of when it is six degrees Celsius. This is caused by the lack of an absolute zero, since it can also be below zero in Celsius temperatures. When there is an absolute zero, this data can be categorized under the Ratio Scale. Weight is one of these ratio scales variables, since the distance between every kilo is exactly the same and there is an absolute zero since you cannot weigh below zero. You can talk about double the weight since someone who weighs sixty kilo's, he or she weights double than someone who weights thirty kilo's (Bryman, 2012). The only variable in this research being of ration scale is age.

After the implementation of all the variables of the 200 participants in Excel, the outcomes will be visually displayed in charts, revealing the first characteristics of the India Art Fair visitor. Are most visitors under the age of thirty? What is the general education level of the IAF visitor? Do most people live near (New) Delhi? Once those and similar questions are answered, a profile of the India Art Fair visitor will be created revealing four types of visitors.

4. Results

4.1 Sex and Age

Although expected but yet another confirmation of the randomness of the used sample, female respondents were represented the same amount as the male participants with a rate of 49,5% to 50,5%. What was also represented proportional were the three youngest age groups namely from 20 to 29, 30 to 39 and 40 to 49. The second group, from 30 to 39 years old are most represented with a percentage of 27, but the other two groups are breathing in this group's neck with percentages of 21,5 (age group 20 to 29) and 24,5 (40 to 49). The older three groups with ages varying from 50 to 70+ form the rest of the percentages as visualized in chart 1.

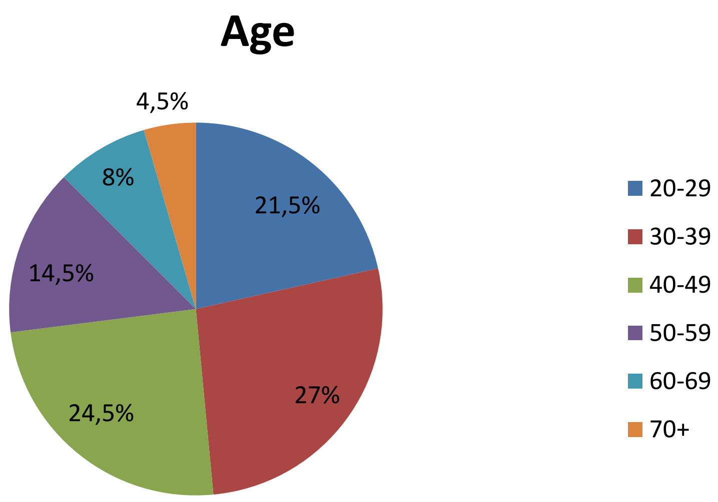


Chart 1: Percentages of represented age groups of IAF 2014 (author's own research)

Although it is difficult to already draw conclusions from only the age data, the fact that the younger groups are broadly represented can point to two things. Either most visitors are young people, like students, artists or art lovers, who have no intention to buy, but only to look at the works of art. Or indeed there is a new group of young millionaires, as Gehi (2013) already mentions, who want to invest their money in arts or buy for decorative purposes. And maybe not even millionaires, but a group of young new buyers recently discovering Indian art and the Indian art market wanting to spend money on art as Neha Kirpal explains after emphasizing that you do not have to be a millionaire to collect art:

'*it's a lot more accessible, it's a lot less intimidating for people to begin their journey collecting art, and we've seen a lot of young, new buyers coming in. Last year for instance, forty percent of what was sold was sold to new buyers*' (Rhine, 2012).

4.2 Nationality

One of the identified functions *(see paragraph 2.1.6. Art Fairs and Biennales),* or characteristics, of international art fairs is their international scope concerning media, (business) transactions, worldwide gallery representations and visitors from all over the world. This way an international art fair forms the connection to the international art infrastructure and the opportunity of emerging art markets to become a significant player in the international art infrastructure. As Vermeylen (Forth.) has shown us, on the India Art fair 2013 edition among the displayed artists, over 45 nationalities were represented (Vermeylen, Forth.). But an important factor of an *international* art fair is also the origin of the visitors. In the sample for this research, consisting out of 200 people, twenty nationalities were represented. As shown in chart 2, the number of visitors with an Indian nationality is overwhelming. 64,5 % of all visitors had an Indian nationality followed by the French with 9,6 percent, an apart from the Indian share a very high percentage if you compare it with the other nationalities. Americans were represented by 7 percent. Nationalities that were only represented by one participant in my research are housed under the title 'others' consisting out of the following nationalities: Greek, Japanese, Lithuanian, Mexican, New Zealand, Norwegian, Sri Lankan and Swiss. This group makes up for 4 % of all visitors of the India Art Fair. Although the Indian percentage blows the others away this chart does show us a broad variety of nationalities from all over the world. And their percentages may not seem that significant at first sight, 35,5% of all visitors (the percentage of people that have an foreign nationality) means over 46.000 thousand people with foreign nationalities were drawn to this art fair (assuming 130.000 visitors in total). This does testify of the international potential of the India Art Fair.

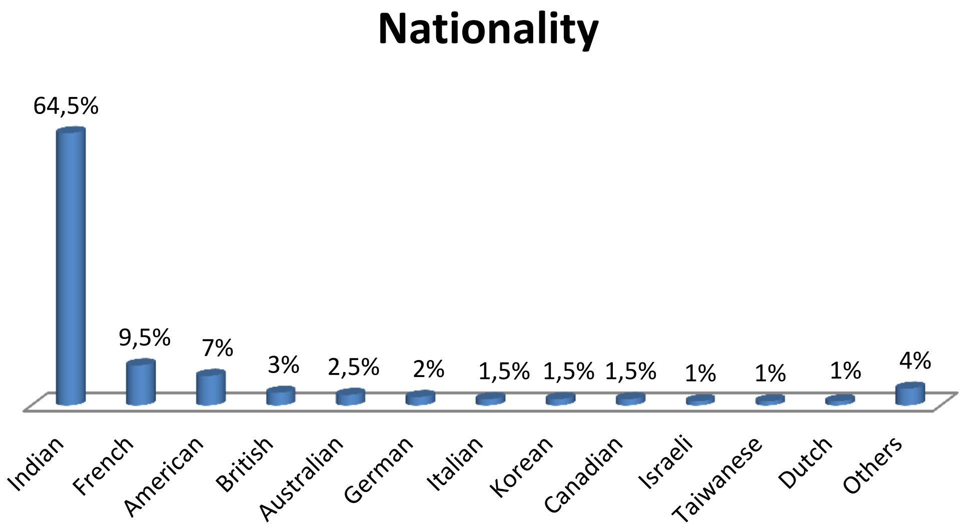


Chart 2: Percentages of nationalities represented on the IAF 2014 (author's own research)

4.3 Country and State of Residence

The percentages of nationalities show already an impressive share of Indian visitors, but at the same time great international potential since nineteen other nationalities were represented at the fair last January and February. However, the data on where the participants actually live even enlarges the notion of local impact as chart 3 visualizes:

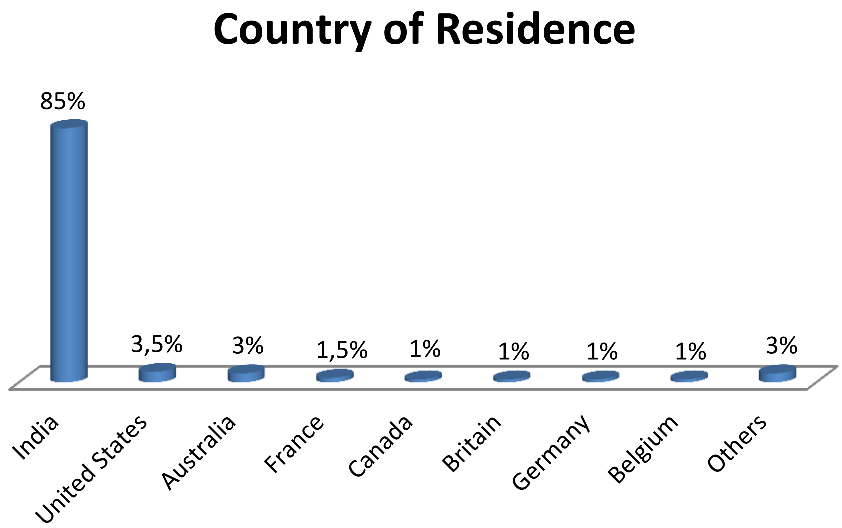


Chart 3: Percentages of countries of residence represented on the IAF 2014 (author's own research)

This chart shows even a share of 85%(!) meaning that 85 % of the people questioned for this research lived in the hosting country of the India Art Fair, regardless of their nationalities. According to the informal conversations these were people who moved to India for their either their job, their education, their spouse or their love for India or Indian art. If you compare chart 2 and 3, this group makes up for over 20 percent of all visitors.

These results could lead you to conclude that the international character of the India Art Fair, concerning the visitors, is an illusion since 20 nationalities are represented in the sample, but 85% over them live in India. So 15% of the people I spoke to traveled especially for the fair to India (or coincidently visited the fair because they were in the neighborhood anyways) which seems a small percentages but does still mean that almost 20.000 people traveled for this art fair. These numbers combine the desire of the art fair organizers to have an international scope, with at the same time a huge local impact what testifies of the real emerge of the Indian art market. If the visitors of the India Art Fair were indeed for a bigger part foreigners who travelled especially for the fair to India, you might not be able to talk about an emerging Indian art market since the Indian people are no part of this growth. But the fact that most people are Indians or live in India (as these results show), means there is an actual growth potential from the inside out. The India Art Fair shows us that the growth of the Indian art market is actually carried by the Indians themselves making it legit to talk about India as an emerging art market.

Not only were people asked to share their country of residence, but if this country would be India, in what Indian state they currently lived. This has provided us with the following chart 4 (that has for the sake of clarity excluded Delhi):

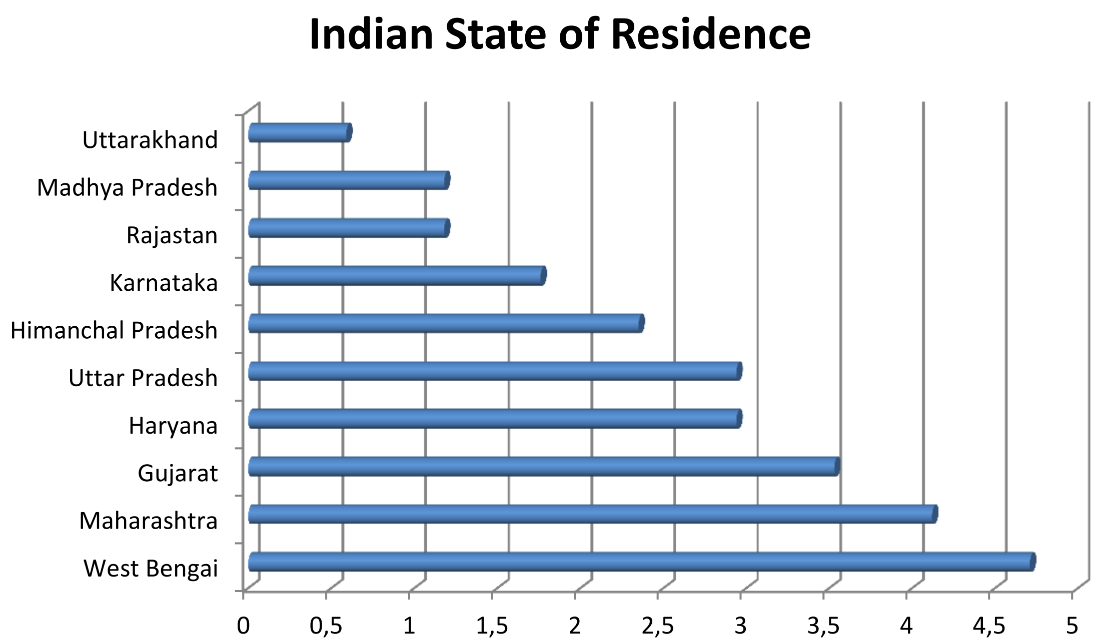


Chart 4: Percentages of represented Indian States at IAF 2014 - Delhi excluded (author's own research)

Not only is the local impact visible in chart 3, this impact becomes even more clear when you ask the Indian residence in what Indian state they are currently living. Over 74 % came from the direct surroundings namely (New) Delhi, emphasizing again the great local impact the India Art Fair apparently has. When you look at the following states with the biggest share of visitors (visualized in chart 4), these are not the states closed to (New) Delhi, but seem to be the other Indian cultural and artistic cities namely West Bengai (Kolkata) and Maharashtra (Mumbai), the latter also being identified as cultural hub within India by Kanzaki Sooudi (2012). One could argue that Delhi is taking over the role of main cultural capital with hosting the India Art Fair and knowing a more widespread network of galleries. The spreading of visitor origins becomes even more clear when visualized on the Indian map, like in figure 1 (appendix 1).

In appendix 1 the percentages of chart 4 are positioned in the concerning state on a map of India. These percentages are written in blue and circled with red. The states that representing a share of the visitors, are green underlined to give you even a more clear overview from which states people came. And although the states with the higher percentages are not closed to Delhi, you can see that the states with the smaller percentages do lie within the surroundings of this hosting city and that the states alongside the South East coast (except from West Bengai) are not represented at all. This concentration of state origins shows again the strong local impact this contemporary art fair has.

4.4 Education and Cultural participation

Another demographic determining cultural participation of people is the level of education (Lévy – Garboua & Montmarquatte, 2011; Johnson 2003). Art consumers are often considered to be relatively high educated because on the one hand people from higher social layers have been familiarized with arts, but also have had cultural education in their school curriculum. Research over the years has shown that if people have been exposed to arts during their childhood and adolescence (for example by arts education at school and museum trips with the family), they tend to participate in cultural activities later on in their live as well. This has as a result that people who visit museums, theatres and events like art fairs, are likely to have received a relatively high education. As is visualized in chart 5, this was also the case on the India Art Fair 2014:

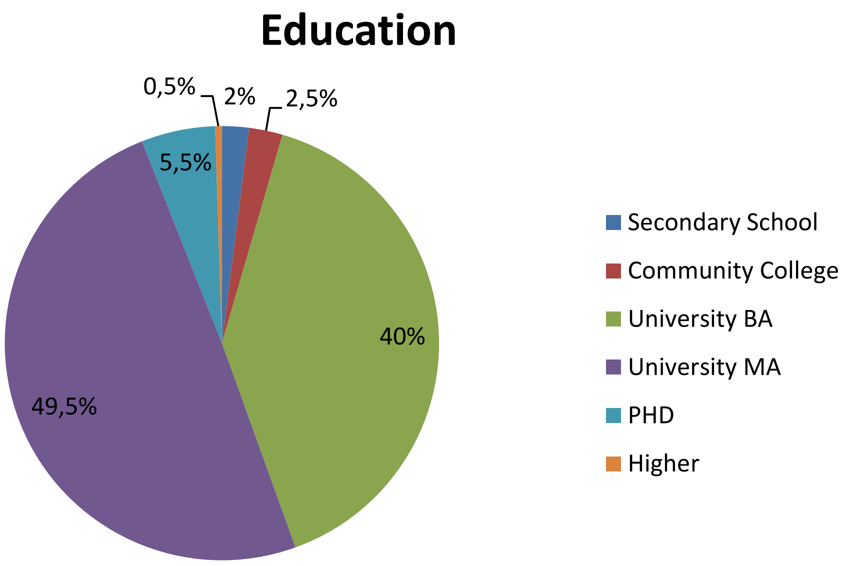


Chart 5: Percentages of highest received education of visitors IAF 2014 (author's own research)

As consistent with the general assumption, the visitors of the India Art Fair were also (extremely) high educated. This is a striking outcome when you realize that the country knows extreme poverty and therefore a big share of inhabitants having no or very limited education by not passing beyond primary of secondary school. In 2010, 14,9 million people in India between the age of 25 and 34 years old had a tertiary education (OECD, 2012), being 1,23% percent of the total number of inhabitants of India. Although these numbers only have shed light on the group of people between the 25 and 34 years old, they indicate that the number of people with a tertiary degree in comparison to the total amount of inhabitants is extremely low. Despite this, 40% of the visitors of the India Art Fair had a bachelor's degree, and even a bigger part (49, 5%) had a master's degree. 4,5% of the visitors has received as highest education community college or lower, the rest (95,5% !) all had a bachelor degree or higher.

This means that although the India Art Fair draws over 100.000 people each year, almost 100% percent of these people comes from the very small group of highly educated Indians. This seems to undermine the founder's main motivation namely making art accessible to everyone, as Neha Kirpal states (Bajaj, 2014). But this comment would be too negative and above all unjust. In a country of over one billion people, you have to start somewhere educating people about (contemporary) Indian art and big events like the IAF tend to draw people from the higher social layers that over goes together with higher education. Despite this, the founder has kept the prices for entry relatively very low. 300 Rs (3 à 4 euros) might still be a big amount for the poorest people in the country, but for 200 Rs you can already eat a decent meal in India. So in comparison with other major art events in the world like the TEFAF in The Netherlands where a ticket is 55 euros and Art Basel in Switzerland where an day tickets costs 42 euros (Golumbuk, 2013), the India Art Fair is indeed more accessible; a point on which the India Art Fair differentiates itself.

Where most visitors who visit artistic events and cultural institutions have received high education, not everyone (in India) who is highly educated also frequently participates in culture what becomes visible if you compare the education chart (5), with the chart that visualizes the cultural participation of the visitors:

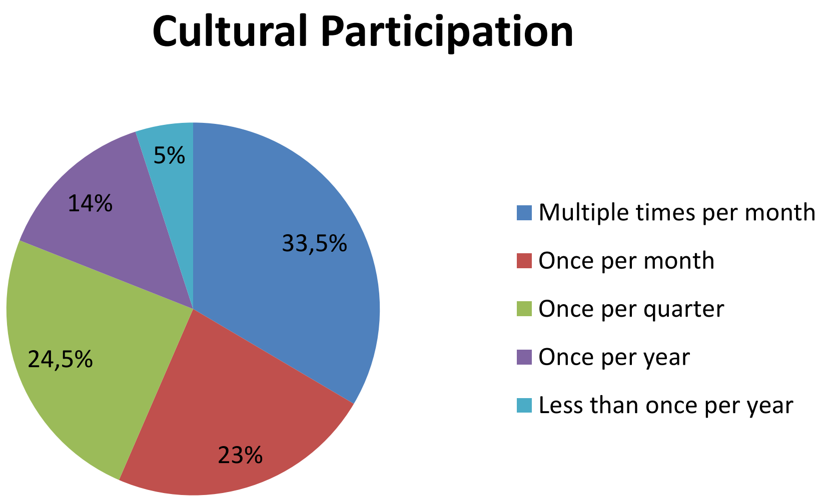


Chart 6: Percentages of frequency of cultural participation of visitors IAF 2014 (author's own research)

So, 95,5% off all participants had received a bachelor degree or higher, but only 33,5% of my sample engaged in cultural activities (like visiting a museum, exhibition, gallery, theatre et cetera) more than once a month, and another 23% visited cultural institutions once a month. The rest of the people I spoke to went to museums, galleries or theatres once per quarter or even less. This might look as a form of disinterest, or that growth of the art infrastructure is still a distant dream. The informal conversations however brought to the surface that a big share of Indian inhabitants would like to engage more in cultural activities but due to a lack of supply in the neighborhood they are unable to. A part from people who regularly visit a gallery to buy a work of art, the few museums in Delhi only open an exposition twice a year or so. Even if you visit all these openings, it would still appear like you do not engage in the arts. A French women who now lived in Delhi said:

'Back in Paris I would visit museums and theatres almost every week. Here in Delhi, there is not that much to do in the cultural field' (Informal conversation, 2014).

So people would want to participate more in cultural activities, but are simply unable to because of the lack of supply. But the India Art Fair they do visit and over 55% of the participants indicated to have visited the fair before (some even every edition so far). The rest of the people (44,5%) visited the art fair for the first time what can point at a different development like the penetration of contemporary art into Indian society since little under half the participants for the first time decided to visit the IAF although never visited before.

4.5 Motivation and Buying Behavior

So far we have looked at determining demographics of the visitors of the India Art Fair in New Delhi. But what drive do people have to visit a contemporary art fair, in this case the India Art Fair? In order to find this out the participants were asked what their (main) motivation was to visit this fair. While formulating the answers to these questions, two types of visitors were kept in mind: the art lovers who were there to see or buy art, and the cultural entrepreneur wanting to network or explore. Chart 7 shows what people with only one motivation have answered:

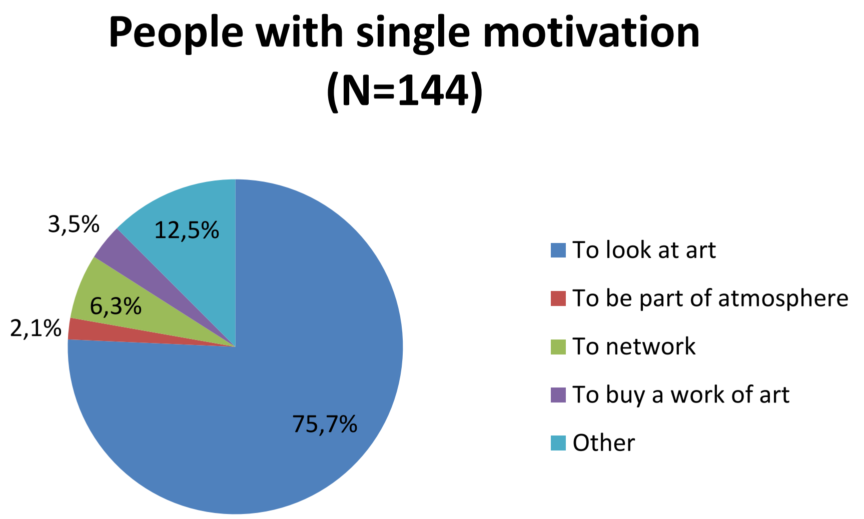


Chart 7: percentages of visitation motivations of visitors of the IAF 2014 (author's own research)

The overwhelming majority of people (over 75%) visited the art fair to look at the works of art presented by the attending galleries and only little over 3% had as main motivation to buy a piece of art. Especially the latter you would not expect since the Indian art consumer is often assumed to be a rich art buyer. And the only way the Indian art market is measured until now is according to art work sales again showing that if we talk about an emerging art market, using the term art infrastructure including also non-monetary artistic transactions would be more suitable. If you only talk about the Indian art market and its growth in terms of money, you excluded a whole group of Indian art consumers that only experience art through visitation, a group that clearly contributes to the growth of the Indian art market if we interpreted chart 7 right. Including this group into the Indian art market valuation might even show a much bigger growth than assumed so far.

Of the visitors who participated in the questionnaire 56 of them gave multiple motivations behind their visit to the India Art Fair, a total of 125 motivations. The motivation 'to look at art' was chosen 51 times, to be part of the atmosphere was for 11 people one of the reasons to visit the fair, 14 visitors came to the fair to network and 16 people indicated to have chosen to visit the India Art Fair among others to buy a piece of art. These numbers have been visualized in table 1:

Motivation	Quantity
To look at art	51
To be part of the atmosphere	11
To network	14
To buy a work of art	16
Other	33

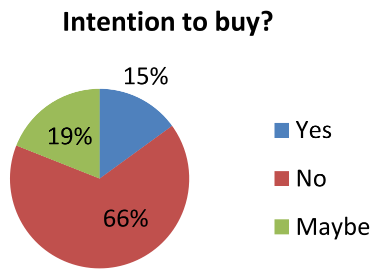
Table 1: Number of times motivations were chosen by people at the IAF with multiple motivations (author's own research)

If we study the data from the visitors who had multiple motivations to visit the IAF, looking at the works of art is still mentioned most of the times, but then the motivation to buy a piece of art, or to network wins more domain.

It seems that if people have multiple motivations, they still come to see the works of art but use this opportunity to extent their network or orientate for future purchases. People like art collectors, art dealers, rich art lovers and artists themselves. Participants also indicated to have other motivations besides the ones that were presented on the questionnaire. A often heard motivation was that people wanted to get inspired, people being mostly artists themselves. But artists also wanted to know what is going on in the Indian art market artistically, a motivation some art collectors and investors had as well.

So let us go back to the buyers for a moment, because although only relatively a small share of people had as (main) visitation motivation to buy a work of art, 15% percent of the participants did have the intention to buy something and another 19 % indicated that they 'might be' buying, if they saw something they liked. And what mediums did people tend to buy? Almost 60% of the participants with only one preference said that the medium was irrelevant, as long as the work of art appealed to them. After that people preferred paintings and photographs. Participants who had multiple preferences tend to buy also paintings (45,5%) and after that sculptures (18,2 %) and installations (16,6%) were most popular. The fact that the overwhelming majority does not want to buy a particular medium, can lead us to conclude that the Indian art buyer today is not only looking for traditional Indian crafts or paintings, but is also open to contemporary imagery and new media like installations and video art.

The fact remains though, that 66% the visitors had no intention to buy anything on the art fair. They had different motivations involving either to explore the field and extend their network, but also wanting to have an artistic experience and to act on their love for the arts. This again enforces the notion that the at least the India Art Fair is mostly carried by non-buying visitors, but you could also extend this finding to the rest of the Indian art market stating that there is a large group of Indians who contribute to the Indian art infrastructure, not by buying works of art, but by visiting art gathering and institutions.



5. Visitor profile

The collected data and calculated percentages explained under the paragraph *results* are valuable for understanding and knowing your visitors, but still a little hard to relate to. Therefore numerical empirical data will be translated into an actual visitor profile describing the types of visitors the India Art Fair attracts, making it easier to relate and therefore understand the visitors and maybe even the India art consumer in general. To construct this profile observations and informal conversations at the India Art Fair are combined with the empirical data from the questionnaires and with the current literature about the characteristics of the art consumer (*See paragraph 2.3.3 Visitor Profile)*. The following four types of visitors have been identified; The Indian Artist, The Indian Art Lover, the Indian Art Buyer and The Expat.

The Indian art lover

Middle-aged - highly educated - visits museums and galleries – wants to be part of atmosphere – visited IAF before

This visitor is middle-aged, highly educated and of Indian nationality. He or she loves art and visits museums and galleries at least once per quarter, but probably more often. This visitor does not have a specific preference for a specific kind of art medium but wants to see what is going on in the Indian art world and wants to be part of the artistic atmosphere. He or she has no intention to buy and has visited the India Art Fair at least once before.

This group of people makes up for around 35 percent of all India Art Fair visitors, telling us that at least on third of the visitors of the IAF contributes to the fair, but also to the Indian art market in general, only by visiting. This shows again how the art visitor being underestimated as indicator for the current state of an art market.
The main motivation of the Indian art lover to visit is to see the works of art and to get an indication of what is going on in the art world. They are enthusiastic and passionate about their national art

The Indian art buyer

Highly educated – rich - travels the world - buys anything - no other cultural participation

The art buyer is highly educated and has a commercial attitude. He or she is rich and wants to buy art either for investment or decoration. They do not have a specific art medium in mind as long as it fits their investment prospective and decorative ideas. This type of visitor travels the whole world to buy his or her art. Outside the art buying visits, in general he or she does not engage in other cultural activities like visiting a museum, apart from buying visitations to galleries and other fairs.

Assuming for a minute that the people who had the intention to buy a work of art, actually did purchase a piece, than over 70% of all buyers had an Indian nationality and also lived in India. When including the participants who replied with a 'maybe', this percentage goes down to little over 60%. Going back to the participants who answered 'yes' to the question if they had the intention to buy, there is still a percentage of 30% left, being potential buyers, but with no Indian nationality. This percentages were divided between foreigners who lived in India (expats) and people who had a foreign nationality and also lived abroad (travellers and/or business (wo)men).

The Indian artist

Young or middle-aged – not monetarily rich –visits to get inspired, to network and to explore the field

This visitor does not have a lot of money but a big love for their national art. He or she mainly visits the art fair to get inspired, but also to make connections with attending galleries and other artists. The Indian artist wants to explore the field and see what is going on in the current Indian art market. Although he or she is interested in all artistic mediums, the Indian artist is still often educated in or practicing more traditional mediums like painting, sculpturing and photography.

Approximately 20 percent off all IAF visitors are artists themselves. Of all the artists I spoke to only three indicated to have the intention to buy a work of art, and another two said ‘maybe’ to that question. The participants were able to indicate more motivations to visit. The artists gave all together around 60 motivations, of which 32 times the motivation ‘to see the works of art’ was chosen, the second most picked option was the option ‘other’ were most artists indicated that they were there to be inspired and six times the box ‘to network’ was picked. From the informal conversations turned out that artists were not only there for themselves, but also to support their fellow artists by visiting the booth the work of their friends was displayed, probably hoping to make some connections with the galleries as well.

The Expat

Young – highly educated – interested in (Indian) art – eager to learn – lives in India for study or work, with or without family – visits fair as (family)trip

The expatriate does not have an Indian identity, but comes from abroad. He or she either migrated to India, or is there on temporary bases with or without his or her family. He or she is here for work or to study for a couple of years, is interested in the Indian culture and has a general interest for (contemporary) art. The expat visits the art fair to be part of the Indian culture, but also as a (family) trip.

As the charts already show, the group of expats makes up for over 20 percent of the IAF visitors. As stated under the subheading 'The Indian art buyer', only a small percentage of the expats indicated that they intended to buy (less than 7 percent), but a bigger percentage (around 30 percent) did indicated though that they might be buying if they saw something they liked. Although India is still in the educational phase concerning contemporary art (*see the paragraph 2.1.5 Art Journalism)*, there seems to be no significant difference between the preferred mediums to buy of expats and of the Indian buyer. Both segments of art visitors had a big share that would buy anything as long as it appealed, and a share that prefers more traditional mediums like painting, photography, sculptures and against my expectations: installation.

6. Facts compared: India and other (emerging) markets

Although empirical comparative researches are required to compare India with other emerging art markets, this research so far allows you already to make a general comparison between India and a country as China, the latter being an art market perceived as being in a further state of emerge. The lack of government involvement in the Indian art market is bitter sweet; chances are missed and growth is being slowed down, while on the other hand private initiatives have filled the gap resulting in fast growing and strong gallery networks in the cultural cities like Delhi. In China the latter has also taken place. A great lack of government involvement and at the same time high degrees of censorships have made entrepreneurs make detours in opening galleries and organizing exhibitions (Dodd, 2014). At the same time imposed political legacies make it hard for Chinese contemporary artists to develop and foreign cultural entrepreneurs to settle themselves in China (Robertson 2005).

The results of this attitude of China is that this country now exists out of smaller art markets that are steered and determined by foreign buyers. Where India is succeeding to create a domestic market where Indian artists sell and show their work to Indian citizens of the growing middle and upper class, the Chinese art market is still being dominated by foreign buyers and high upper class millionaire Chinese; a market that only recently is being able to attract a significant amount of foreign art dealers to their art fairs (Robertson, 2005). Again, a comparative research of a bigger scope is required in order to compare all the art infrastructure facets of both countries, but it is already clear that these two markets (the one of China and India), are developing in a different way and have different characteristics although they are both named often in only one word: BRICS.

It is not only interesting to compare various countries with one another, but also comparing the distinct India Art Fair with other Western art fairs. As is the case in comparing various countries, this asks for more extensive research, but already can be deducted that the India Art Fair differentiates itself on at least two levels: with their mission and desired target groups. Where other international art fairs like Art Basel promote themselves by stating to attract the most leading galleries and to present cutting edge innovative art, the India Art Fair profiles itself as long deserved platform for Indian artists wanting to teach the Indian people about Indian art and international contemporary art (Art Basel, 2014; India Art Fair, 2014c). Educating the people about something relatively unknown, is exactly what the India Art Fair distinguishes from its 'fellow' international art fairs. And being able to attract that number of people in a developing art infrastructure, also means that the India Art Fair might be the event that is able to connect the two worlds D'Costa (2012) identifies: the global India and the *Bharat*.

Two worlds that are (consciously) kept separate at other Western art fairs like Art Basel. Where relatively inaccessible galleries and international auction houses are able to connected only to the Wall street India of investors and wealthy collectors, the India Art Fair seems to touch the lives of also the normal middle class coming already closer to bring these two isolated worlds together, especially in combination with other facets of the art infrastructure like art magazines and museums.

7. Summary and Conclusion

The main plead of this master thesis is to look at an art market in terms of the total infrastructure, rather than only at sales and other monetary transactions and results. Instead of only looking at auction records and at the total the amount of art sales in a country, we should also look at the state of the whole art infrastructure of a country including the museum sector, art journalism and artistic gatherings like art fairs. This tells you much more about the state of a particular art market than just sales, also in the case of India.

The last few years we are overwhelmed by good news about the Indian art market and its tremendous growth. Christie's held its first auction in India (Kazmin, 2013; The Guardian, 2013), the number of in India established galleries has grown immensely (Azhar, 2011) and big international contemporary art events (like the India Art Fair and the Kochi – Muziris Biennale) are being organized in India resulting in a growth of the Indian contemporary art market of 830% in only one decade (Kraeussl & Legher; 2010). You cannot deny that the Indian art market is starting to rise, but if you take a look at the whole art infrastructure of India, you become much more modest.

Studying the art infrastructure of India, instead of only the monetary numbers, you realize that the Indian art market is actually still in an early stage of its development, in contract to the extreme positive news coverage from the last years. Although the number of art galleries has risen over the last decade, this is still a very small number in comparison to developed art markets, not to mention the fact that the gallery sector only seems to develop in a few cities like Mumbai, Kolkata and New Delhi. Also the lack of a museum sector shows the early stage of emerge the Indian art market is in. Due to their colonial past, the cultural policy of the Indian government is very much concentrated on heritage preservation and the promotion of Indian culture, leaving no room for contemporary art; a concept that is not even clearly defined yet, making it extremely hard to develop and carry out cultural policies in this area. Museums are therefore mainly focused on Indian tradition, archeology and history. This cultural policy aiming at preservation and promotion of Indian cultural is also visible in the Indian art schools, teaching their students traditional techniques and ways of looking for inspiration (Poulsen, 2012). But we should not be too negative. Although the Indian art market is not as developed as many articles state, India is definitely heading in a good direction. The Indian cultural policies might still be very much focused on heritage preservation, it seems that the notion of contemporary art, and the importance of it for the country of India, is surfacing slowly. Although a big majority of museums is about the promotion of Indian culture, some contemporary museums and public galleries are popping up. The same goes for the art academies, where more and more students are being taught about contemporary art and to work in a free and inspired manner. The number of galleries might be relatively low, they have gone from nearly no galleries in the whole of India, to a network of galleries in some cities. And where first no significant international art events were hosted by India, now the India Art Fair and the Kochi – Muziris biennale have risen, drawing for a few days or months the international attention of the art worlds to it.

Another fact points at the great potential of India becoming a big art market. The results of the questionnaire show that 64,5% of the participants had an Indian nationality and even 85% lived in Delhi at the moment of the India Art Fair in 2014. The fact that the India Art Fair has a strong local embeddedness was already shown by Van Hest and Vermeylen (Forth.) concerning the number of nationalities represented among the displayed artists at the edition of 2013. Artists from 45 nationalities were represented, but 66% were from India and the surrounding countries like Pakistan, Bangladesh and China. This local embeddednes is confirmed by this research and although the art fair has an international scope being able to attract media attention and visitors from all over the world (making themselves the middle point of the international art world for a few days), they also have a strong local impact. With that local impact in combination with the international scope, this art fair has the capacity to put India on the global map while at the same time enforcing the Indian art market from the inside out. In combination with the data that most people had no intention to buy, this tells us that this art market is also growing by non-purchase cultural participation and that this market is growing because of its own in habitants. The Indian art market growing from the inside out, instead of being carried by rich foreign buyers, is good news for the long term for India. The growth is not carried by temporary economic prosperity because very rich Indians and international buyers are purchasing art, but is steadily emerging by a growing artistic awareness among the Indian people. And although Kanzaki Sooudi (2012) identifies the urban elite to determine the state and direction of the Indian art market, the 'normal' citizen has a much bigger role than we thought so far.

This research has brought us four types of India art fair visitors, and although the Indian society is a totally different one than our Western societies, these types of visitors seems to be very much in line with the current literature on the characteristics of Western art consumers explored in paragraph 2.3.3 (Visitor Profile). The literature on the Indian art market, combined with the informal conversations at the art fair and the statistical data from the conducted survey, has brought us four types of India Art Fair visitors. The Indian art lover is the first one identified, resembling the Indian visitor who is not per se monetarily rich, but has a big love for the arts in general. This visitor has as main motivation to take a look at the art works, and expressed no intention to actual buy a work of art. Although this is an Indian visitor with the Indian society as its context, it really much fits the picture of the in this thesis explored cultural omnivore (p. 36 – 37). The Indian art lover is a person with a high education level, relatively modest income and a big interest in various types of art; a person Peterson (1992) described as a cultural omnivore and which can also be connected to Bourdieu's earlier defined cultural elite (Van Eijck and Van Oosterhout, 2005; Van Eijck, 2000). The art consumer that is on the contrary to the omnivore is the cultural univore and although this art consumer has not been identified as visitor type at the IAF, some of the characteristics are to be found in the Indian art buyer. This group of people is highly educated, located in both younger and older generations, but instead of expressing interest for only traditional forms of art, their only motivation to visit the art fair is to buy an art piece (showing also a lot of resemblance with Bourdieu's economic elite, who have a high financial spending power and use art to form their highly exclusive lifestyles (Van Eijck and Van Oosterhout, 2005)).

The other two identified visitors on the India Art Fair are the Indian artists and the expats, both types of art consumers that have been neglected so far in the art audience studies. Understandable on the one side since art consumer researches look into the demand side, a side where artists are on official terms not on, but strange on the other side since you can expect artists to visit art fairs for all the discussed motivations in this thesis (to see the state of the field, to network, to get inspired et cetera.). The same goes for the expats. Although they might not be the first group you think about while studying the art consumer, they are part of the global economy (Black and Gregersen, 1999) and can therefore especially be expected to turn up in emerging countries like India and be part of the art audience coming with specific characteristics due to the nature of their staying and presence in comparison to actual original inhabitants.

It extremely interesting to see that all four, but especially the Indian art lover and the Indian art buyer, are profiles that also have been identified in audience studies within Western countries. Although the country of India is a different society, in a different state of development and on a different geographical location, the art consumer shows a lot of resemblance with the Western one. On account of the results in this thesis I would like to argue that the profile of art consumers is possible a global one, what again raises questions for ground breaking future research about a possible 'global' art consumer, the purposes and possibilities of art, but also about societies and social layers in general.

This thesis has tried to give a complete overview of the state of the Indian art market. Not by looking only at sales at auctions and galleries, but by mapping the total Indian art infrastructure and the state in which it is in, what has shown us a more nuanced image than the actual news coverage on this subject. This research also wanted to shed light on the Indian art consumer by studying a yearly contemporary art event, the India Art Fair. This has led to the conclusion that the Indian art market is not only carried by (Indian) millionaires, but also by the 'normal' Indian, coming from the middle or upper class. When you realize that the Indian art market is still in a state of early development, in which the concept of contemporary art is still being defined (Poulsen, 2012), you understand the amazing accomplishment Neha Kirpal and her team has realized by attracting over 100.000 visitors in a few days each year. Until now she was able to show what India has to offer and at the same time educate the people of India about (Indian) contemporary art, although mainly reaching the higher educated citizens.

Despite the tremendous developments of some essential facets of the art infrastructure the last decade, this infrastructure still lacks clarity and structure making it a misty journey for artists themselves, but also for consumers (Poulsen, 2012). This development is being hindered by the lack of definition of contemporary art because of the perceived significance of heritage preservation and promotion, and because this art infrastructure has to rise in a country existing out of differences; rich and extremely poor people. The reality still teaches us that the developments India and the art market has gone through the last years is very beneficial for the middle and upper class in India, but the people from lower social layers still have to struggle to survive; a change with continuity.

8. Future Research

With the time and manpower constraints I was able to create a representative sample of 200 people, a sample that has resulted in some significant results telling us about the visitor of the India Art Fair, and about the Indian art consumer more in general. Despite this, the sample of 200 visitors is still very small in comparison to the total number of visitors, making this research into impressionist and exploratory one, shedding the first light on the consumer side of this emerging art market.

Now this research has made the first steps, future research is needed to create a more in depth and more wide spreading image of the Indian art consumer. The India Art Fair can still be the starting point for this, by enlarging the sample to a few thousand visitors and widening the scope of questions; by asking people also their yearly income and going more in depth about their visitation motives. Depending on the format of the research it can be extended by including samples of visitors from other cultural gatherings or institutions in Delhi, creating an even more accurate profile of the Indian art consumer.

Future research can also be extended outside the Indian borders by executing comparative researches among different international art fairs. This research has already come to the conclusion that the IAF distinguishes itself from other international art fairs concerning their educational function, the people they reach and the approach this relatively new art fair takes in comparison with for example Art Basel. Conducting the same research like this one on a bigger scale on Rotterdam International Art Fair, Art Basel and Frieze Art Fair will show some interesting results, maybe even telling us more about the Indian art fair visitors.

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10. Appendix 1: Map of India with visitor representation percentages

11. Appendix 2: Survey

Survey India Art Fair 2014: Visitor Profile
Lisa Fuchs, Master student Erasmus University Rotterdam

The results of this survey will be fully anonymous and are used for scientific purposes only

- Sex
  Male / Female

- Age
  - 20 – 29
  - 30 – 39
  - 40 – 49
  - 50 – 59
  - 60 – 69
  - 70+

- Nationality________________________

- Country of Residence (If India, which state?) ______________________________

- Education (highest received)
  - Primary School
  - Secondary School
  - Community College
  - University degree Bachelor
  - University degree Master
  - PHD
  - Higher

- Motivation to visit
  - To look at the works of art
  - To be part of the atmosphere
  - To network
  - To buy a work of art
  - Other: ______________________________

- Have you ever visited the India Art Fair before?
  Yes/ no

- Did you (intend to) purchase a piece of art?
  Yes/ no

- If yes, what kind of work(s)? ____________________________

- How often do you participate in cultural activities (visiting a museum, gallery, theatre etc.)?
  - Multiple times a month
  - Once a month
  - Once per quarter
  - Once a year
  - Less than once a year