

A large, intricate white geometric pattern is centered on the page. It features a complex arrangement of overlapping squares, diamonds, and lines, creating a symmetrical, crystalline structure. The pattern is composed of multiple layers of geometric shapes, with some elements extending outwards to form a wide, flat base and a pointed top. The overall effect is that of a traditional Islamic or Arab geometric design.

Art in the United Arab Emirates

Public opinion survey
March & April 2017



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Sunstream Research & Consulting

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Introduction

Welcome to the Sunstream Research & Consulting Art in the United Arab Emirates public opinion report.

This represents the first in a series of research studies on art in the country. Forthcoming editions include an analysis of trends and valuations regarding Middle Eastern modern and contemporary art, art services and regulation; and insight from key opinion formers.

As for the report, it derives from the inspiration and activity delivered by Art Week 2017 in the United Arab Emirates (and though not part of this study – Qatar). March, the period in which the event took place, evidenced a great wealth of culture, expression and a stirring arts industry.

In similar regard, there exist a number of significant art institutions, organisations and galleries in the country – and these are growing in size, stature, global recognition and influence.

It is at this conjunction that Sunstream seeks to understand public sentiment toward the visual arts.

A survey which took place through March and April, garnered responses from 228 individuals and 34 nationalities. Respondents constituted people living in the country and across the globe, but nonetheless familiar with the UAE.

Although the scope recognizes the country as a whole, it centres questions on where arts movements are most prominent – namely Dubai, Abu Dhabi and Sharjah.

Our goal with this survey, is to develop insight to:

- Public attitudes to and awareness of art – how active and involved people are and perceptions toward initiatives.
- The general appetite for investment – whether purchasing art, and Middle Eastern art in particular, is deemed worthwhile and if so at what price levels.
- A broad understanding of how art is considered in the social and economic spheres; the role of women and public institutions for instance.

With respect to the United Arab Emirates, it maintains its political stability and dynamism within a largely unsettled region. Eight new cabinet ministers averaged 38 years of age at the time of their appointments in early 2016. Their mandates represent a break from tradition and include happiness, tolerance and the future. Equally, women represent approximately 30% of cabinet positions.

Economically, instigated by low oil prices and pressure to tighten government spending, a change in fiscal policy is set to begin from 1 January 2018 with a new tax regime. The effect this will have on the arts trade and the economy in general is something that Sunstream will be following – and reporting on – closely.

Greater elaboration on the purpose of the survey is given in the coming section. Respondent demographics are followed by survey results. We also summarise what we understand in order to offer a platform for thought and discussion.

This study is solely commissioned by Sunstream Research & Consulting. The space set aside for art, artists and galleries in the forthcoming pages is offered bona fide, having taken the permission of the artist or gallery.

I hope that you enjoy reading, and importantly, benefit from this study. If you have comments or questions, please feel welcome to contact me.

Ibrahim Serafi
Business head
ibrahim.serafi@sunstream.ae



The public survey and its purpose

This report aims to assess what impact the visual arts, exhibited in the United Arab Emirates, have on the general population. It looks at the interest they generate and moreover – with a focus on Middle Eastern art – the perceived value as both an industry and asset class. Further, the study looks at better understanding how broadly art – and by association culture (in as much as the arts express and communicate culture) – is reflected upon the country. It also gauges how accessible art is and to what level this is appreciated.

March represented a number of significant art initiatives in Dubai, Abu Dhabi and Sharjah. Amongst others, they included Art Dubai, Sikka Art Fair, events at Alserkal Avenue, a second major exhibition at Guggenheim Abu Dhabi, the Sharjah Biennale, the opening of Sotheby's in Dubai and Christie's auction of modern and contemporary Middle Eastern art.

Similarly, the Emirates houses and attracts significant artistic talent from outside. This is seen partly in the growth in the number of international galleries and auction houses through to the development of museums such as the Guggenheim and the Louvre, increased activity generated by art events – such as Art Week – and the influence that local institutions, like the Sharjah Foundation and Art Dubai, carry around the world.

On a different plane, the traditional perspective has been to view the country for its commercial front and possibly not as a place where culture has a significant presence. Dubai for example – as recently as this April, is defined in *The New Yorker* online as a city resembling anthropologist Marc Augé's 'non-place'.¹ Essentially a representation of anodyne super-modernity and transit versus history and identity.

Nonetheless, modernity, transit and travel bring people together resulting in the greater frequency in meeting. The United Arab Emirates has correspondingly been ranked number 10 most connected country in the latest edition of the DHL Global Connectedness Index.² To this accord,

evidence suggests that the country, with cities like Dubai representing super-modernity, has brought together a vibrant and rich tapestry of cultures and this is being expressed significantly in art.

With an overall objective better understanding the arts industry in the country, this is the first of a series of reports that also assess Middle Eastern modern and contemporary art pricing, services and regulation and professional insights.



¹ Andrew Marantz, 18 April 2017, 'Dubai, the world's Las Vegas. A frictionless layover in a non-place of a city', *The New Yorker* (online edition), accessed 20 April 2017, <<http://www.newyorker.com/culture/photo-booth/dubai-the-worlds-vegas>>

² Pankaj Ghemawat and Steven A. Altman, DHL Global Connectedness Index 2016, *The State of Globalization in an Age of Ambiguity*, accessed 2 May 2017, <http://www.dhl.com/en/about_us/logistics_insights/-studies_research/global_connectedness_index/global_connectedness_index.html>



An extensive collection of Modern and Contemporary Art



Fernando **BOTERO**

House, 1995 - Oil on canvas, 118 x 156 cm

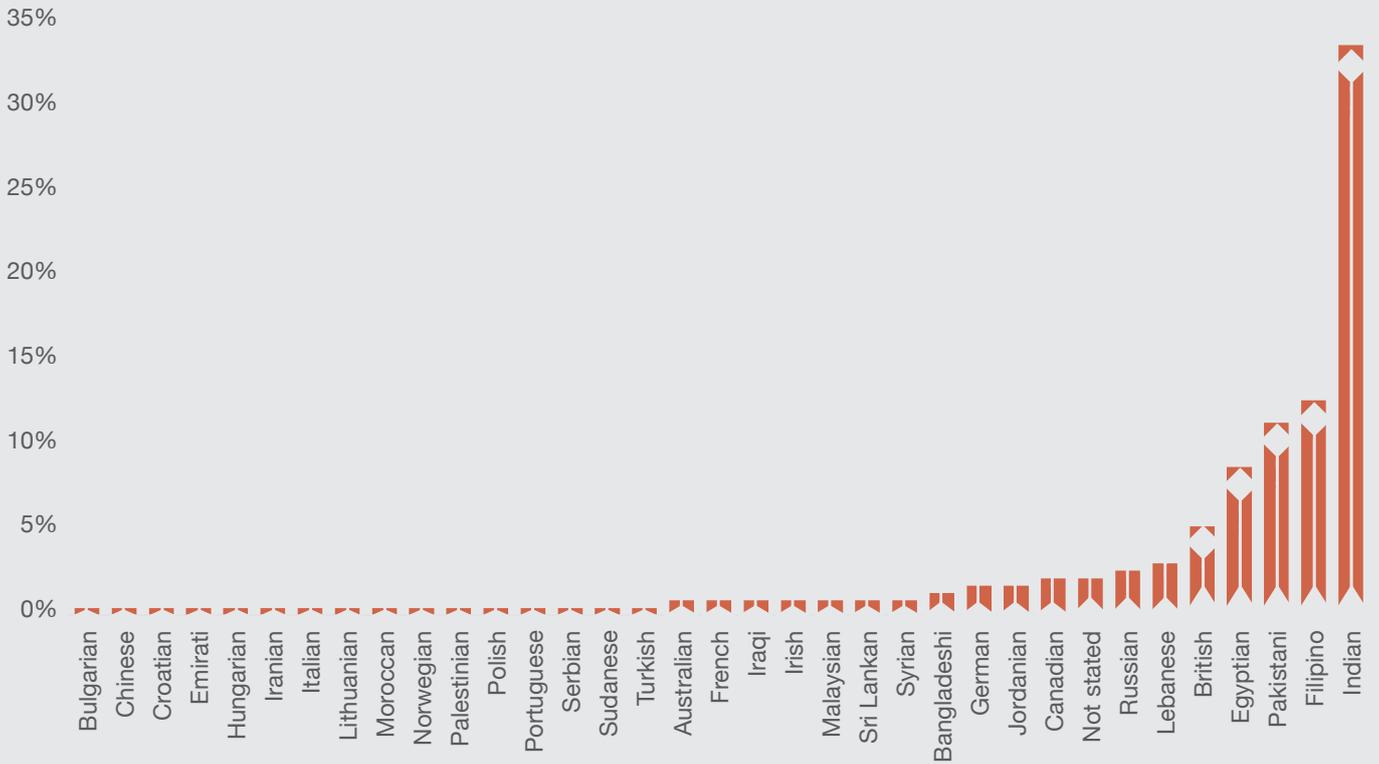
OPERA GALLERY

operagallery.com

Gate Village Building 3, DIFC, PO Box 506737, Dubai T. +971 (0)4 323 0909 dubai@operagallery.com

Survey demographics

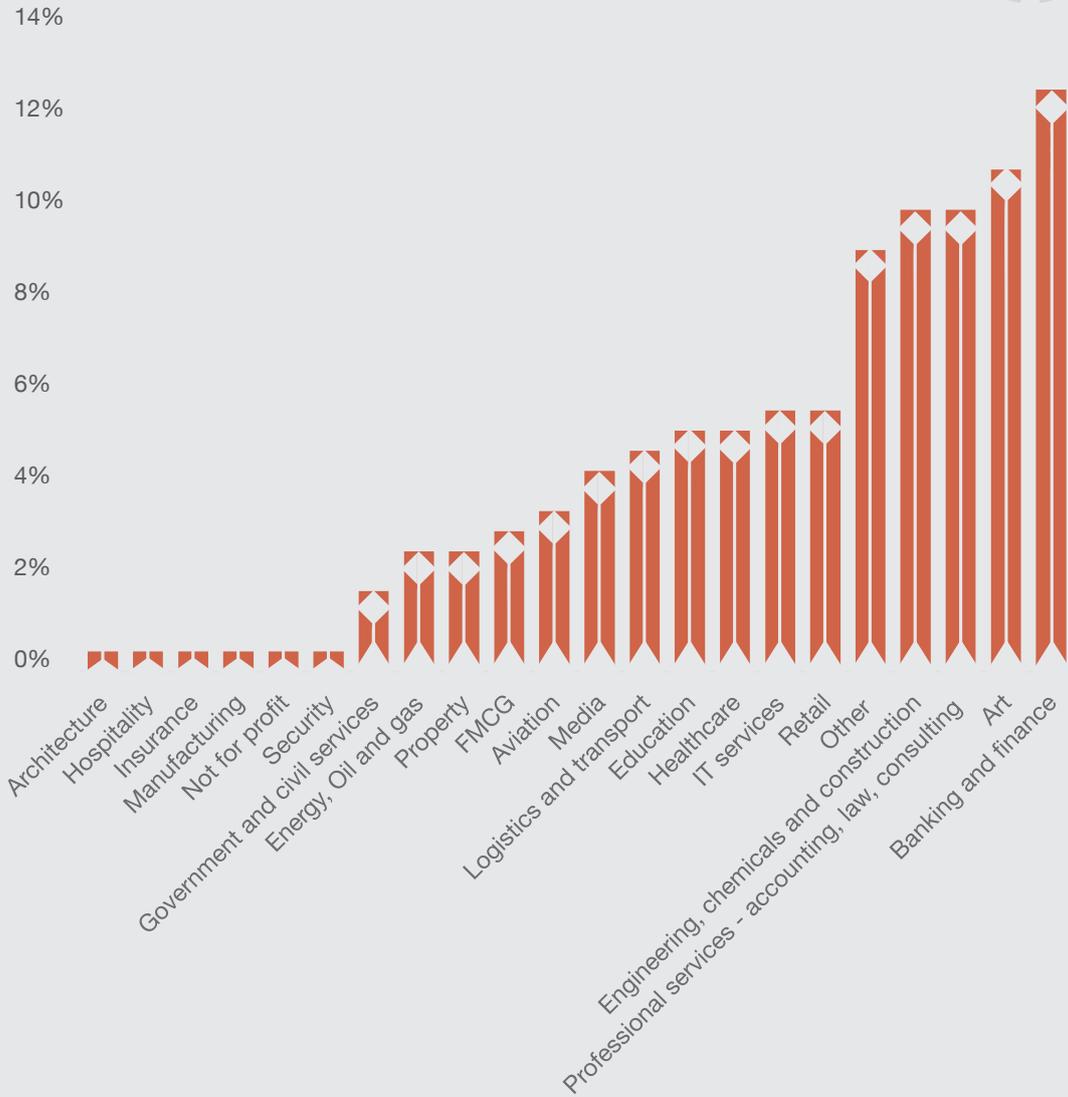
◆ Respondents by nationality



◆ Although not everyone mentioned their statehood, people from at least 34 countries answered the survey, with Indians dominating the polling at 33%



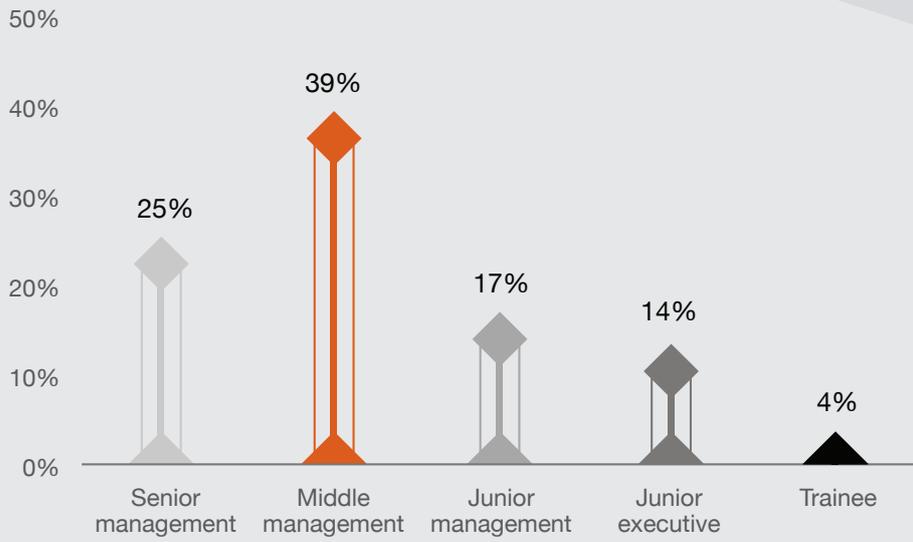
◆ Respondents by industry



A diverse industry pool is dominated by banking and finance, art, professional services and engineering, chemicals and construction



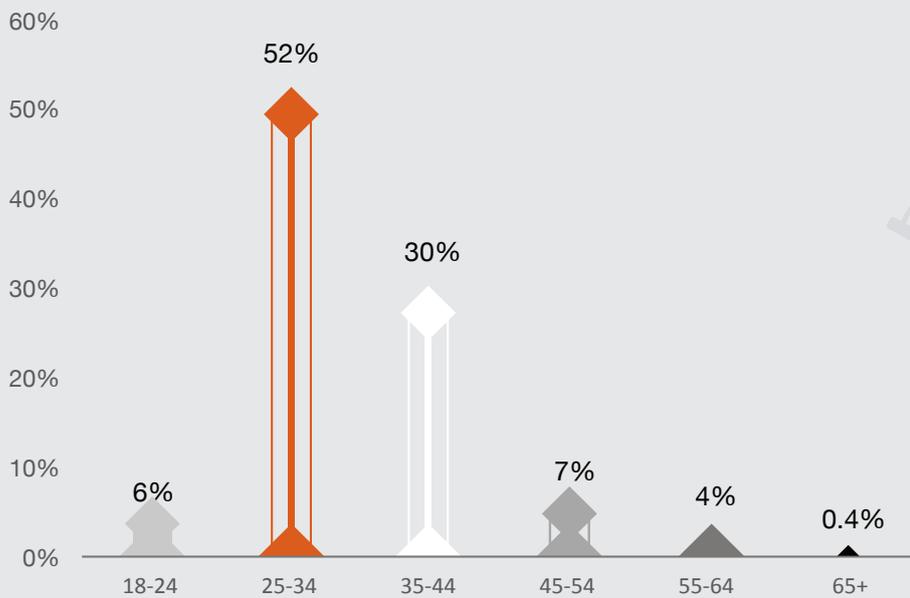
◆ Career level



Almost two thirds of the survey population hold senior or middle management positions



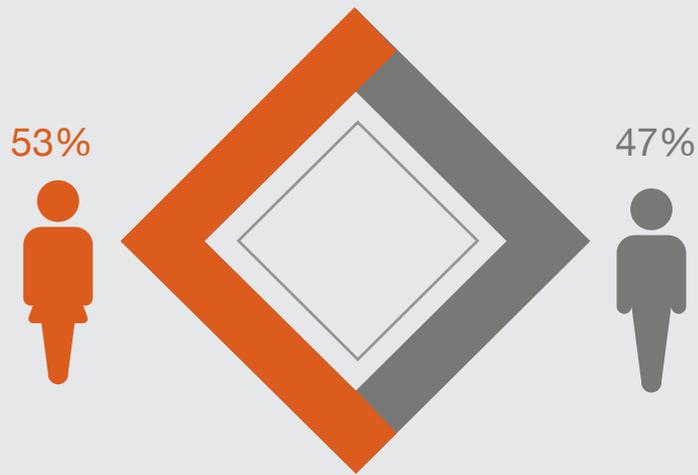
◆ Age group



Slightly more than 4 out of 5 people questioned are between 25 and 44



◆ Gender



Just over half of our survey population is female





Catherine Le Paih.
The Loft.
Oil on canvas
80 x 120 centimetres

◊ Awareness & involvement

This section asks how cognizant the resident population is of initiatives, and in addition, how involved they are when it comes to the visual arts.

Questions and responses are laid out here in the following pages and there are some interesting and positive outcomes.

For example; the understanding by more than half of respondents that Dubai, Abu Dhabi and Sharjah have much to offer when it comes to visiting galleries and arts events. This belief is supported later whereby 65% of the survey population negate the suggestion that the three emirates are not associated with art nor culture.

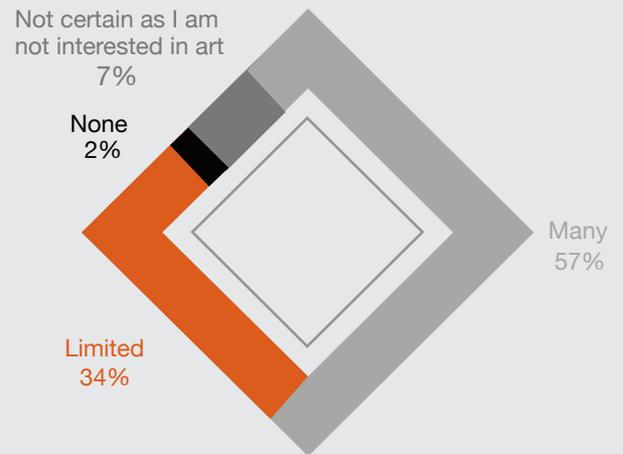
Moreover, based on a randomized survey, about a quarter of people answering, state that they are actively involved in art – either as professionals or otherwise connected. Another third, not actively involved, say that they have a good understanding and appreciation for it. These significant numbers bode well for a growing and vibrant industry and broader conveyance of culture.

On different footing, 4 out 5 respondents say they make a point of visiting museums and galleries when they travel. This is juxtaposed against about 60% who visit galleries and art events in the Emirates every quarter. The implication being, there is room to attract more people to arts initiatives within the country.

As for all round familiarity regarding what is on display; where one fifth say they are unsure as to the cultural perspectives on show, there could be opportunity for a more centred platform for communication. This is further affirmed with 35% agreeing that they appreciate art but do not have enough knowledge about it.

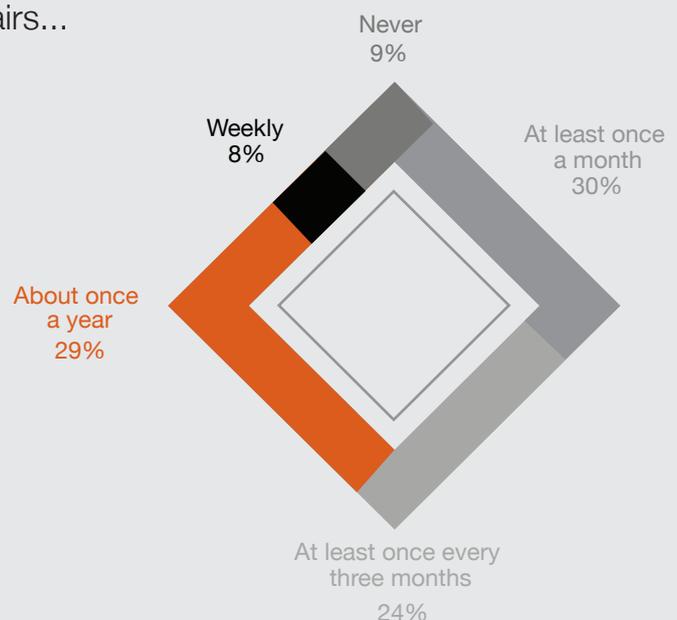


Does Dubai and its neighbouring emirates Abu Dhabi and Sharjah, offer opportunities to visit art galleries and events?



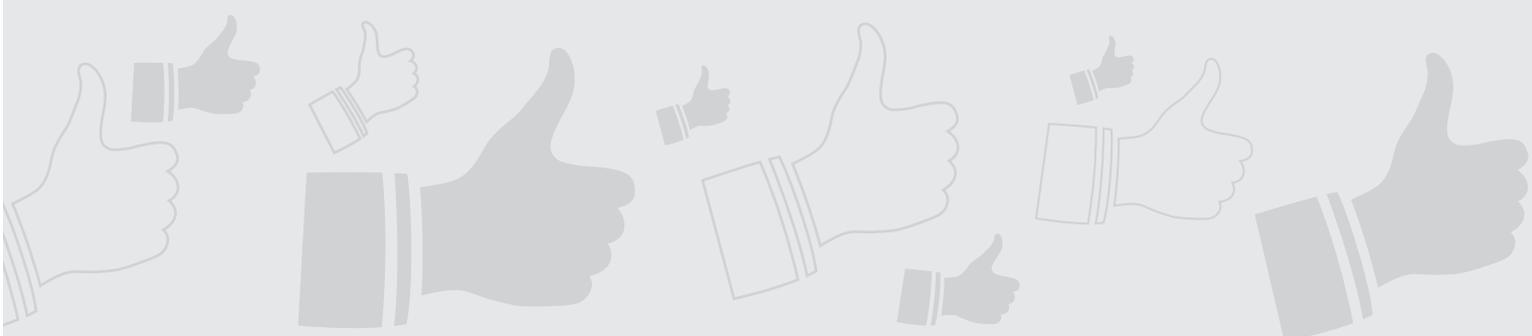
More than 1 in 2 respondents feel that Dubai, Abu Dhabi and Sharjah offer many opportunities to visit art galleries and events

I make the time to visit galleries and art fairs...



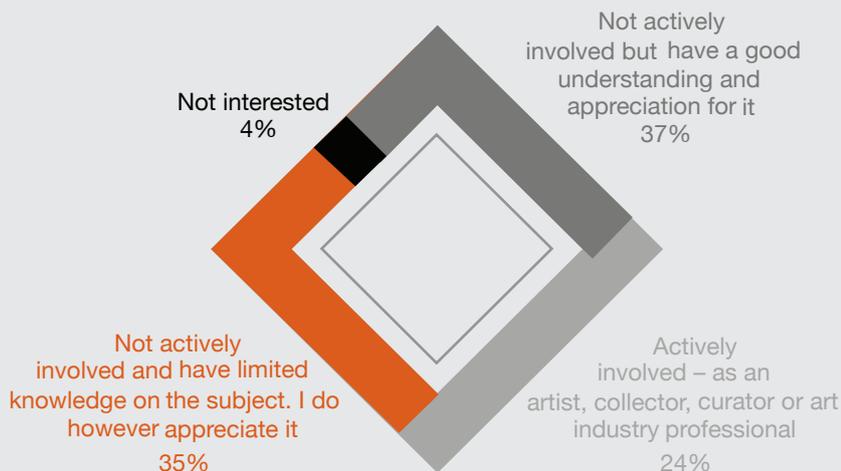
Around 6 in 10 people asked, visit art galleries at least once every three months





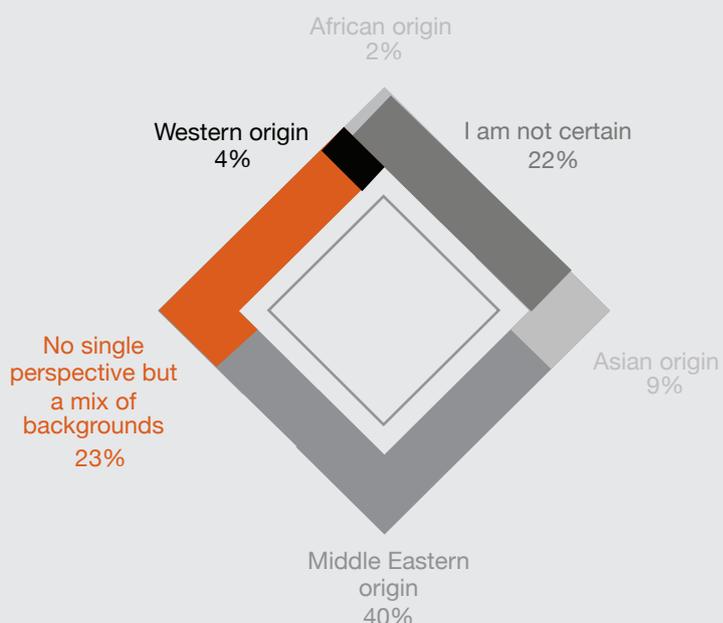
In respect to the visual arts, I am...

◇ About one third of the survey population state they appreciate art, but do not have enough knowledge on the subject

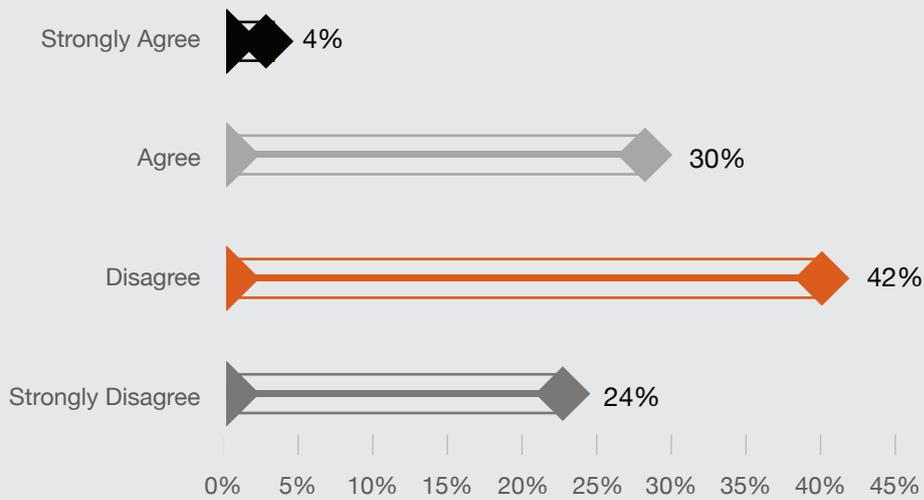


The art galleries and museums in Dubai and its neighbouring Emirates, Abu Dhabi and Sharjah display prominently artwork of...

◇ Although Middle Eastern art is significantly on view, so is art from different backgrounds and perspectives. One quarter of those surveyed answered this correctly

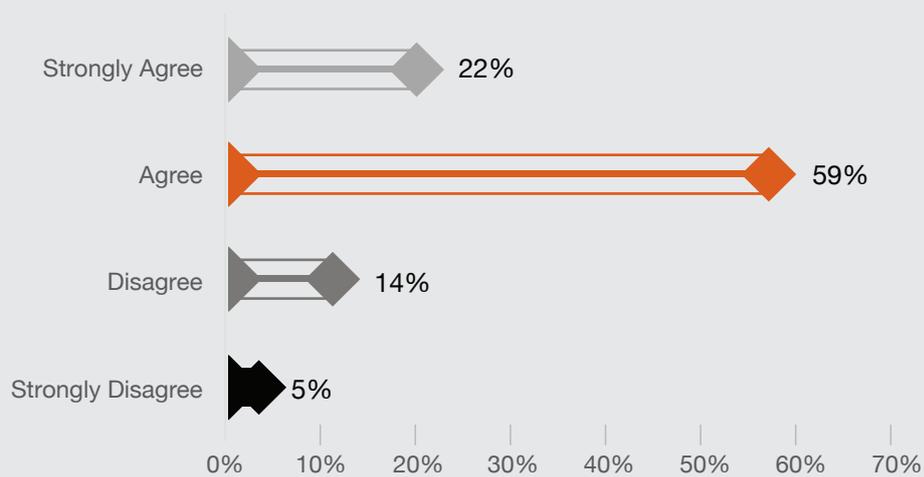


Dubai, Abu Dhabi and Sharjah are not names that I would associate with art and culture

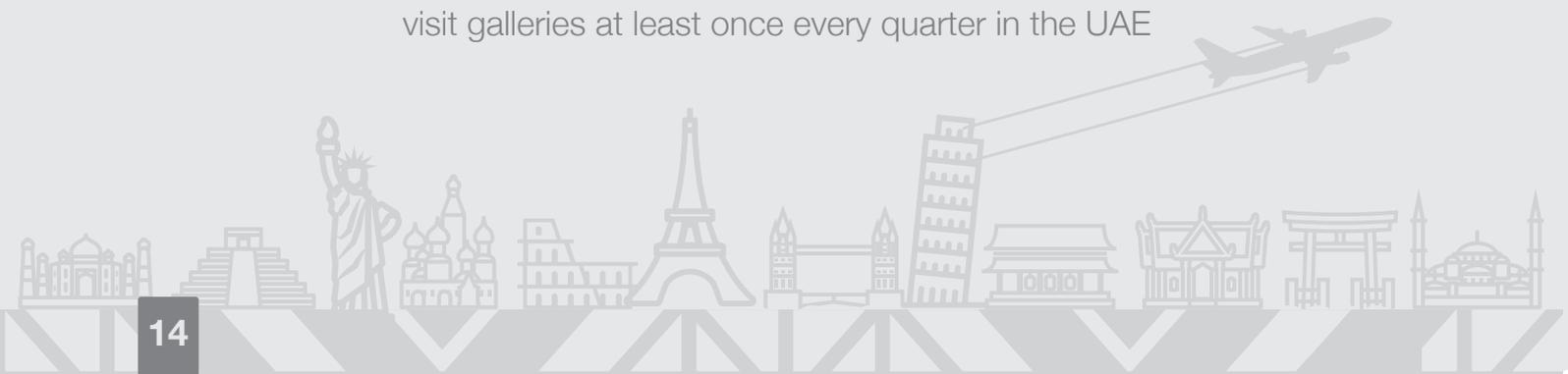


Two thirds of respondents disagree to the contention, that the Emirates is not associated with art and culture

When I travel, I make a point of visiting an art gallery or museum



About 4 out of 5 people asked, give priority to visiting art galleries when travelling. A higher proportion than those who visit galleries at least once every quarter in the UAE



Investment appetite

With respect to art and commerce, Dubai takes prominence in the Emirates. Christie's auction of modern and contemporary Middle Eastern art held on 18 March 2017, resulted in slightly over \$8 million in sales for 106 lots. This averages to \$76,221 for items sold, inclusive of buyer's premium. Hammer prices ranged from \$3,750 through to \$685,500 (again incorporating buyer's premium), with Egyptian Mahmoud Saïd's *île et dunes* painting and sketch, representing the highest value and beating a pre-sale estimate of \$250,000 – 300,000, by some distance.

This event coincided with Art Dubai and resonated the relevance of regional art and the investment appetite held by clientele that the city houses or hosts. Sotheby's also marked its official opening on 14 March this year, again concurrent to Art Dubai, with an exhibition of modern and contemporary Arab and Iranian art.

As for art galleries; a number of distinguished names have found residence in Alserkaal Avenue and Dubai International Financial Centre, displaying works from a field of Middle Eastern and global cultural perspectives.

Yet it seems that not enough is understood when it comes to Middle Eastern art and making the decision to purchase, with one third of people surveyed affirming so. Added to which; when asked whether they are prepared to invest in modern and contemporary Middle Eastern art at a price level of either above or below \$5,000,³ one in ten state they are willing to spend more, while one third say they would not invest in art from the Middle East. A belief that stands counterpoint however, is that art is a worthwhile long term investment.

Questions also try to gain understanding to the perceived value of Middle Eastern art vis-a-vis Western work. They tap further into purchasing propensity, asking whether the surveyed population has bought art in the past and if so, how recently. The use of technology in art buying is also

raised. This final question is set in the context where online presence at auctions is becoming ever more significant. Similarly, one quarter of respondents are comfortable with buying art using an electronic platform.



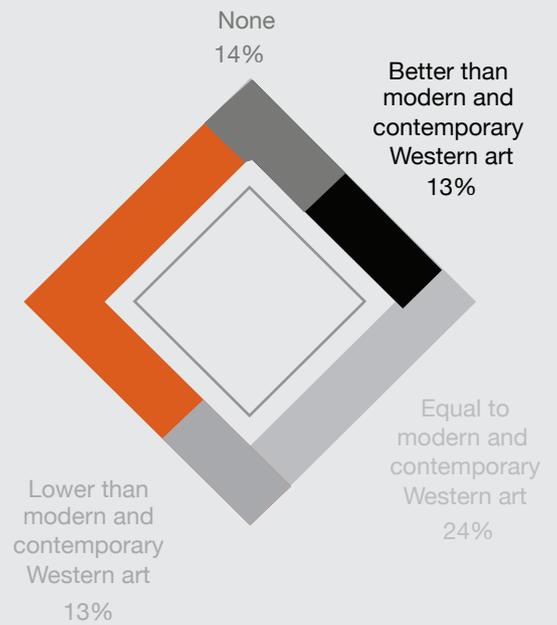
³\$5,000 approximates entry level at an auction like the one held at Christie's on 18 March



The investment opportunity offered by modern and contemporary Middle Eastern art is...

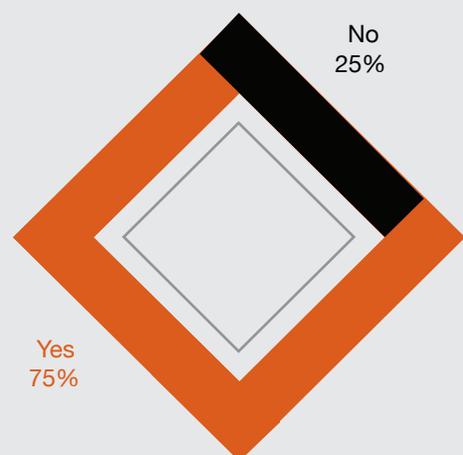
One third of respondents state that modern & contemporary Middle Eastern art offers an investment opportunity, however feel that they require greater knowledge on genres

An investment opportunity, however I need to be more knowledgeable with comparable values
36%



Is art a worthwhile long term investment?

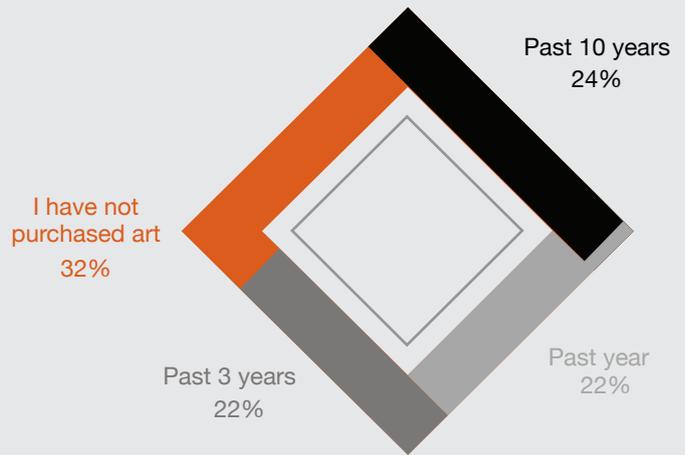
For art in general, 75% of the survey population believe it can be a worthy long term investment





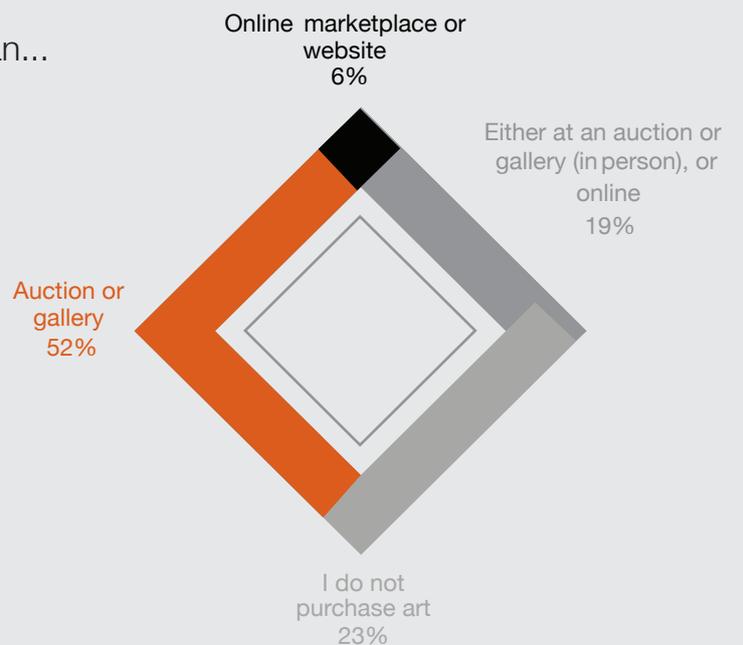
I have purchased one or more items of art in the...

2 out of 3 people asked, say that they have purchased art at some point in the past decade



I would be comfortable purchasing art at an...

1 in 4 people questioned is content to purchase art online





LONDON

SARA SHAMMA

EXHIBITION: April 18 - May 20, 2017

VENUE: Art Sawa | DIFC

T +971 4 3862366 E info@artsawa.com W www.artsawa.com

artsawa

LONDON | SARA SHAMMA

Sara Shamma's *London* is her first new body of work since moving to the United Kingdom.

Having been awarded an Exceptional Talent visa, granted to recognised and emerging leaders in specialist fields, including the arts; her paintings draw inspiration from early experiences of her new home.

London, the city, represents a second move for Syrian-born Shamma and her young family, who in 2012 fled war in Damascus to the safety of her mother's country, Lebanon. This compounding of events and personal circumstance has given rise to works reflecting personal experience in the face of a collection of catalysts to civil unrest and diaspora.

Witness to physical and mental anguish, her paintings from this period trace the visceral imprints of terror on the body and its resulting expressions. They are figurative evocations rather than portraits, composite characters drawn from faces and bodies, through the filter of the mind's eye. This collection distils conflict experienced, whilst questioning its causes.

Previously, a regular visitor to London often to exhibit her work, Shamma arrived this time at the beginning of a new academic year and dived headlong into the currents that are British domestic and family life. Choosing a school for her children and settling herself into a close circle of parents, teachers and friends, Shamma's most striking and immediate observations centred around the extraordinary contrast in attitudes between her children's classmates and their peers in the Middle East. Whereas a guarded deference characterizes relations between children and adults in the home region, Shamma discerns a refreshing and joyful fearlessness and freedom in the way her children's new friends relate to teachers, family and other figures of authority; much more in harmony with her non-traditional upbringing, and the spirit in which she and her husband go about parenting.

Shamma believes strongly that children who are encouraged to express themselves freely and without fear of reprisal, embracing playful exuberance, can grow to perpetuate the values of peacefulness and freedom; thus forming a bulwark against civil strife. Happy children beget more secure, principled and independent adults. Whilst they may not be a guarantee against violence and war, they are a prerequisite for democracy, and with it any hope for abiding peace.

Shamma decided her first work out of London should explore and celebrate the spirit of imagination and the possibility embodied in the children she has met.

She invited them into her home to sit for a series of portraits. These stand as counterpoints, even antidotes, to her *Q, Diaspora and World Civil War Portraits*. In essence a visual proposition of what a "good beginning" can look like.

During their visit to her studio, the children were provided art materials to experiment with. Elements of the resulting paintings and drawings have been selected by Shamma and transposed onto the child's portrait, integrating their nascent creativity, and making it in a sense a collaboration, as well as a personal evocation of particular and precious moments in these young lives.

By reaching out into the community that has welcomed and given her new hope and inspiration, she is consolidating the city's place in her work as well as her own place within it. To audiences in the Middle East, these paintings offer insight into a more liberal regime of childhood, but they function also as a reminder to resident Londoners of conditions they take for granted, but which are by no means a given nor immutable.

London is Sara Shamma's second exhibition with ArtSawa Dubai and continues until the 20th of May.

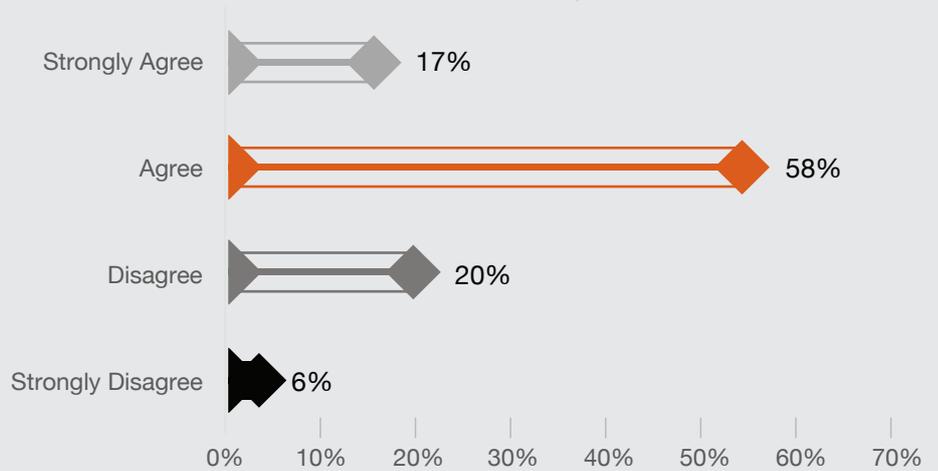
Art in the socioeconomic framework

This final section of the questionnaire seeks to garner public sentiment toward the role of the arts within the broader social, political and economic canopy.

For instance, the perceived place of women in the industry – where in fact they hold highly significant and powerful positions, especially in the Middle East. Here, amongst a raft of female figures in the region, is Sheikha al Mayassa bin Hamad al Thani, chair of Qatar Museums, widely recognized as the most powerful woman in art. In similar respect, women head the Sharjah Foundation, Art Dubai, Tashkeel, a host of galleries and hold senior positions at the Guggenheim, Christie's and Sotheby's. That said, although over one third of respondents felt that women do hold powerful roles in the arts, they believe this is not in the Middle East. Added to which, one in ten stated that females have no significant influence.

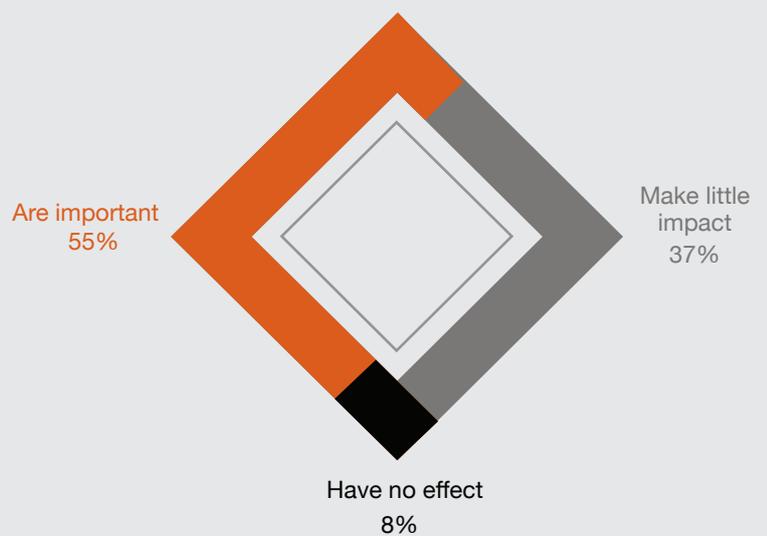
Other questions gauge perceptions to how important arts institutions are to diplomacy and international relations in as much as they offer opportunities for cultural exchange; whether galleries and museums should be publicly funded, if paying to view art is generally acceptable and moreover with the prevalence of the internet and technology, whether this is best communicated in situ at a gallery say or online. Here, two in every three persons questioned would rather visit a gallery or museum.

Art has an important role to play in politics, diplomacy and international relations⁴



Nearly 3 out of 4 respondents believe that art has an important role to play in politics, diplomacy and international relations, with it being a medium for cultural discourse and exchange

In respect to business and the economy, art institutions such as museums and galleries...

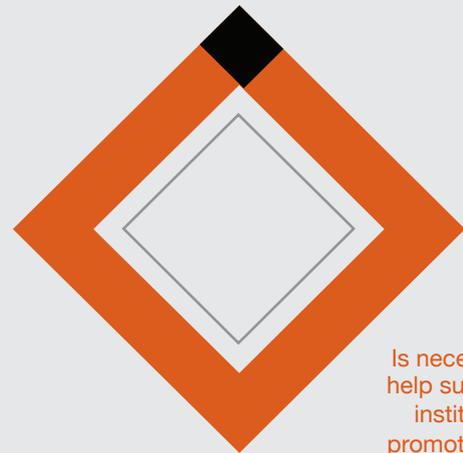


More than 4 in 10 of people questioned, state that museums and galleries make little or no impact to business and the economy

⁴ The total here adds up to 101% as a result of rounding up decimal numbers

Public funding of galleries and museums around the world...

Is unnecessary. Art institutions should operate more like businesses with greater risk of failure
6%

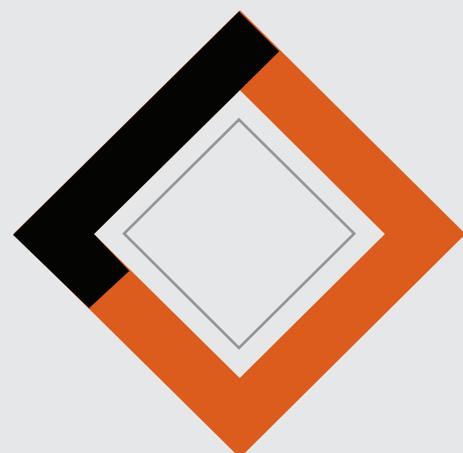


Is necessary to help support art institutions promote culture
94%

More than 9 out of 10 respondents feel that public funding of art galleries is required around the world to help support art institutions promote culture

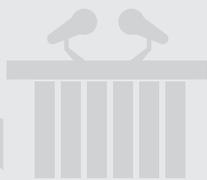
I would be happy to pay for an entry ticket when visiting an art gallery or museum

No
35%



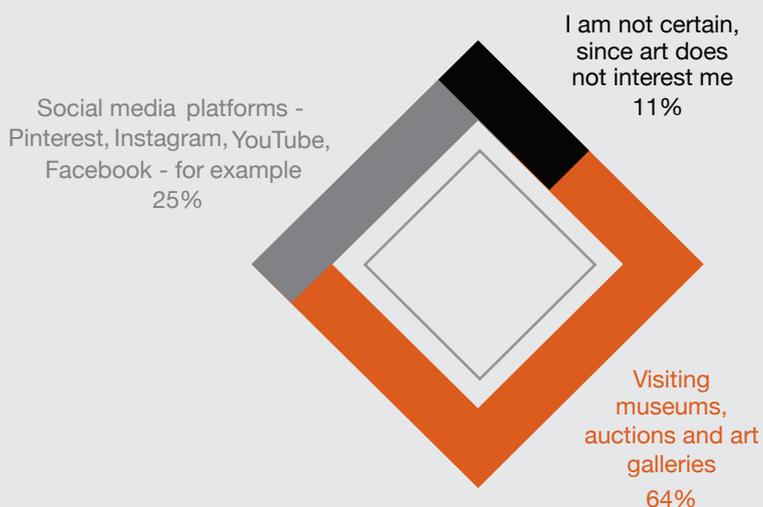
Yes
65%

Nearly 2 out of 3 people questioned are ready to pay, to visit an art gallery or museum



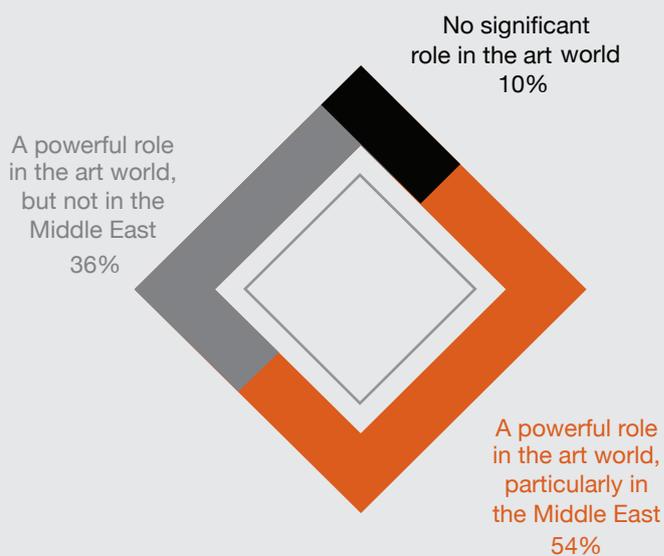
Communicating and discussing art and its place in society is best done through...

Bricks and mortar rule, with nearly 2 out of 3 respondents stating that art conversation is done best through visiting museums, auctions and art galleries



In my opinion, women hold...

Whereas the Middle East is home to some of the most powerful women in the art world, across the globe, 46% of respondents think that this is not the case



What we understand from the survey

Starting with awareness and involvement, our first learning outcome from the questionnaire, is a broadly agreed upon association of the country, with art and culture. Furthermore, the Emirates is seen as offering significant opportunities for attending art-related events and galleries. We believe this to be a positive divergence from the traditional view regarding its largely commercial standing.

The survey was randomly distributed and did not deliberately target people in the arts industry, yet a large proportion of people, 11 percent, seem to be involved in art; many of whom are resident, more than initially anticipated. This is possibly supplementary evidence to its growth and vibrancy. That said a significant number of the respective population is not certain as to what art genres are exhibited and this may be an opportunity for greater communication and education.

The respondent pool, broadly international and reasonably representative of the diversity in the country also indicates significant upward mobility. For example, many respondents work in senior and middle management positions in industries including banking and professional services (accounting, law, consulting). Additionally, a large proportion, four fifths, are between 25 and 44 years in age. However, only about one in ten stated a willingness to purchase modern and contemporary Middle Eastern art at an approximate auction entry price of \$ 5,000. Fifty percent were more likely to purchase at a lower level. One third stated the need for greater knowledge.

Similarly, with three out of four of those questioned believing that art is a worthwhile investment and with two-thirds claiming to having purchased art in the past decade – such interest indicates significant potential in acquiring and involvement in art.

As for the role of technology; traditional methods for communicating and purchasing art, reign. More than half of respondents prefer to buy art in a gallery and two-thirds would rather communicate and discuss the subject by going to institutions.

With respect to the broader global context, three in four of the surveyed population agreed to the significant place that art holds in international relations and diplomacy, yet just over half felt that galleries and museums are important for business and the economy.

The role of women, especially the powerful mandates that they hold in the Middle East, is not widely enough understood and again there is an opportunity here to further communicating this fact.

Lastly, on the budgetary government level, an overwhelming 94% of the people questioned, state that public funding of museums and galleries is necessary, two-thirds however would be happy to pay for tickets to access galleries and museums.





Ihsan Al Khateeb.
Emotions and the mind.
Oil on canvas.
170 x 160 centimetres.



Burhan Khan.
Tree.
Metal and thread.
7 feet 8 inches x 3 feet 2 inches





Sunstream Research & Consulting

The purpose behind our research.

Sunstream Research & Consulting is driven by the desire to better understand the region and the world which we live in.

Operating within the Middle East economic and business context, our purpose – through research – is to offer correct, meaningful, easy to access and simple to digest information.

The benefit for our clients comes in being able to assess situations clearly and draw opinions, based on legitimate fact, educated insight and measurable data.

Our team offers expertise in a broad range of sectors:

Art
Capital and money markets
Charities and non-government organisations
Digital media and mobile applications

E-commerce
Financial services
Healthcare
Manufacturing

Oil and gas
Supply chain
Transportation and logistics

As for our services in research these constitute:

Census reporting
Key industry insights and opinions
Market feasibility
Market sizing and segmentation

Price comparisons and indexing
Research and analysis
Surveys

With the objective of harnessing substantial intelligence and presenting it well, we exist to support informed decision making.

The result of our work we expect, translates into providing the knowledge required to take action.

For any queries please feel welcome to contact us.

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