

## Placing arts districts within markets

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DOI:

[10.1111/1468-2427.12748](https://doi.org/10.1111/1468-2427.12748)

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*Document Version*

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*Citation for published version (Harvard):*

Zhang, AY 2019, 'Placing arts districts within markets: a case study of 798 Arts District in Beijing', *International Journal of Urban and Regional Research*, vol. 43, no. 6, pp. 1028-1045. <https://doi.org/10.1111/1468-2427.12748>

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Zhang, A. Y. (accepted and forthcoming) Placing arts districts in markets: a case study of 798 arts district in Beijing. *International Journal of Urban and Regional Research*.

## **Placing arts districts in markets: a case study of 798 arts district in Beijing**

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### **Abstract**

This paper examines the role of arts districts as places situated simultaneously in urban land and art markets, and highlights the necessity of attending to such role of arts districts and to the impacts of both markets in research of arts districts. While the influences of art market on land value in arts districts have been studied in some art-led gentrification cases, there has been limited consideration of how changing organizations and structures of the art world and art market, especially in the recent decade, have affected these places in geographical and urban studies of arts districts. Through a case study of 798 arts district in Beijing, China, this paper demonstrates that both land value and situations of art market need to be taken into account when explaining changes to and/or spatial stickiness of an art scene, and that an arts community's investment in the value of an arts district as a generator of symbolic capital in the art market could be one driver of land value. This paper concludes by advocating more attention to the dual market role of arts districts and stronger engagement with knowledge produced by art scholars in geographical and urban studies of arts districts.

**Key words** arts district, rent, art market, artists, speculation, China

### **Introduction**

“Who’s to blame? Art fairs are, to a large extent”, writing in *The New York Times* in September 2018, Olav Velthuis, author of *Talking Prices: Symbolic Meanings of Prices on the Market for Contemporary Art*, argues that the dreadful “barely surviving” situation that many smaller and midsize galleries face nowadays is largely a result of art fairs rising into the art market’s potentate in the past two decades (Velthuis, 2018). Earlier in May 2018, a similar point was made by art critic Jerry Saltz on *New York* magazine’s Vulture site, who names art fairs as the main force that worsens the polarization between larger/high-end galleries and medium/small galleries in the art market (Saltz, 2018). The significant role that art fairs have assumed in the art market and their influences on galleries are not new to the art world and have been documented, discussed, and criticized by art historians, critics, and scholars since the mid-2000s (Biggs, 2004; Harris, 2004; Saltz, 2005; Velthuis, 2005; Thompson, 2008; 2011; Tang, 2011). Such knowledge, however, has yet to be sufficiently incorporated into geographers’ and urban studies scholars’

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research of arts districts and neighborhoods – places where galleries, art institutions, and artist studios concentrate.

Arts districts are mainly examined through their roles in urban land market in geographical and urban studies (Zukin, 1989; Ley, 2003; Mathews, 2008; 2010; Harris, 2012; Bain, 2018). Some of these existing studies have paid attention to how the art market can affect the roles of arts districts in urban land market; for example, valorization of particular art genre has been identified as an important factor in certain art-led gentrification cases (Deutsche and Ryan, 1984; Zukin, 1989; Harris, 2012). However, with few exceptions (Molotch and Treskon, 2009), geographical and urban studies on arts districts have shown limited attempts at addressing how changing structures and organizations of the art world and art market, such as the increasing significance of art fairs, affect arts districts as urban places, and how these places are shaped by dynamics of urban land and art markets simultaneously. This paper attends to this research gap and highlights the necessity of bringing these two markets together in research of arts districts through a case study of 798 arts district in Beijing, China.

In what follows, I first situate arts districts in urban land and art markets through drawing on research done by both geographers and urban studies scholars and art scholars. In a section dedicated to research on arts districts in China, I highlight that while existing studies have documented the roles of arts communities and art market in the formation and rise of arts districts in China, there is a lack of attention on how these aspects continue shaping arts districts. I then briefly introduce the case of 798 arts district and explain my methods for data collection. The next two sections discuss how 798 arts district functions as a rental market and its role in and for the art market respectively. I demonstrate that first, both rising rent and situations of art market affect 798's status as a place for art business, which suggests that explanations of changes to arts districts need to bring both urban land and art markets into consideration; and second, despite 798's waning attraction to art business, the arts district is still perceived by many in the arts community as valuable for the art market, which not only helps maintain this art scene but also contributes to its rent increases. I conclude by arguing that attending to the role of arts districts as places being simultaneously positioned in urban land and art markets can help diversify and enrich geographical and urban studies of these places, and that such studies can benefit from engaging with knowledge produced by art historians, critics, and scholars.

### **Situating arts districts in urban land and art markets**

Studies examining the connection between arts districts and urban land markets in North American and European contexts often identify a “pioneer” role played by artists in reappropriating devalorized post-industrial urban spaces (Deutsche and Ryan, 1984; Zukin, 1989; Mathews, 2010; Harris, 2012; Shkuda, 2015). While artists displace working-class tenants from such areas, they usually face displacement when middle class professionals are attracted to these neighborhoods for the cultural capital these places represent (Zukin, 1989; Ley, 2003; Mathews, 2008). The ability of arts communities to alter devalorized urban spaces symbolically and physically is found to make art-led gentrification an urban investment strategy, employed by real estate developers to pacify the “new urban frontiers” (Smith, 1996) and re-brand them as appealing locations to potential consumers (Zukin, 1989; Ley, 2003; Mathews, 2008; 2010). This link between art and urban land value is argued to be taken to a new level with local state being more actively involved in gentrification since the 1990s (Hackworth and Smith, 2001; Smith, 2002) and the “creative class and creative city” discourse being globally circulated and accepted since the early 2000s (Florida, 2002; Peck, 2005; Catungal *et al.*, 2009; Ponzini and Rossi, 2010). Arts sectors are increasingly incorporated into urban policies that aim at promoting cities and stimulating investment (Cameron and Coaffee, 2005; Mathews, 2008). “Art” in this sense is not limited to artists’ living-working milieus but appears in more diverse forms, such as public arts (Sharp *et al.*, 2005), art festivals (Quinn, 2005), cultural flagships (Evans, 2003), planned arts districts and cultural quarters (Catungal *et al.*, 2009; Krivý, 2013; Mathews, 2014), and temporary and pop-up artistic uses (Colomb, 2012; Harris, 2015).

Insofar as the above summary is a generalization of the relationship between arts and urban land market, it is inevitably incomplete and does not apply to every case. Exceptions and alternative interpretations can be found in studies of artists and arts districts in cities. For example, Alison Bain’s (2013) study on artists and cultural workers in Canadian suburbs demonstrates that in addition to the conventional idea of associating urban centers with cultural activities and artistic creations, suburbia can also be valued as spaces for cultural production. Her recent research into the roles of property owner and small-scale developer played by artists in real estate market further complicates the existing knowledge on the formation and spatial stickiness of urban arts districts (Bain, 2018). The limitation of the art-led gentrification thesis as

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an Anglo-American centered theorization is challenged through case studies conducted in other contexts (Aharon-Gutman, 2017), such as the “failure” of transporting a SoHo model to Mumbai due to the different position occupied by contemporary art in Indian society from that in the United States (Harris, 2005). And even in the “Global North”, the relationship between artistic (or creative) use and post-industrial regeneration is proved to be more complex than the one suggested by art-led gentrification literatures. In a comparative study of Lausanne and St Petersburg, Andres and Golubchikov (2016) demonstrate that in cities of high culture, “creative brownfields” tend to be ignored or even restrained by cultural policies that focus on existing high-culture brands, and as a result have not played a role in generating land values. Studies of China’s arts districts also show that the presence of art or artists is usually not the direct reason for competitions over land use in arts districts: before arts districts were formalized, artists often faced displacement as their landlords seek to sell the land for quick profits; and after arts districts are institutionalized, competitions faced by artists over land use from commercial land users are mostly results of local governments’ branding of arts districts as tourist destinations rather than the presence of art/artists *per se* (Zhong, 2009; Currier, 2012; Zhang 2018).

Moreover, changing land uses in the case of arts districts/neighborhoods are not only results of urban land market, but also those of the art market. For one thing, while artist studios, nonprofit arts organizations, and experimental galleries are usually the major players in the early stages of an arts district, commercial galleries start entering the area when these “pioneers” bring in enough demand from the art market, playing a role in driving up the rent (Mathews, 2008; 2010). For another thing, changing tastes and demands of the art market for different “kinds of art” can also affect the “fates” of arts districts (Molotch and Treskon, 2009), for these places tend to be strongly associated with particular genre or trend of art, which sometimes is due to the necessity of branding in art market (While, 2003; Harris, 2012; Rothenberg, 2012). While existing research has addressed how arts communities and dynamics of art market play a role in the emergence of arts districts and how the valorization of certain art genre could drive up property values in arts districts (Deutsche and Ryan, 1984; Zukin, 1989; Harris, 2012; Ren and Sun, 2012), there is, however, a lack of attention paid to how the changing structures and organizations of the art world and art market, especially in the recent decade, affects arts districts. The rest of this section draws on studies of contemporary art market to provide a brief review of such changes.

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An art world, as defined by Howard Becker, is “the network of people whose cooperative activity, organized via their joint knowledge of conventional means of doing things, produces the kind of art works that art world is noted for” (1982: x). This notion of art world largely refers to a relational but also institutionalized setting of doing art in a particular field of art. But not every component of an art world is entirely encompassed by its established, institutional setting. For example, while “going to the museum” is an institutionalized component of the art world of visual art, how the audience perceives and interprets the artwork is not institutionalized. An art world also goes through institutional changes and innovations where the “conventional means of doing things” are challenged, altered, and replaced, and “subworlds” emerge or disappear (Becker, 1982). In visual art, the modern art world emerged in the mid- to late-19th century in France through the rise of the “critic and dealer-system”, which was a new and distinct institutional setting separated from the previous one that was predominately controlled by the state (Harris, 2004: 32). Today’s contemporary art world to a large extent still functions around this “critic and dealer-system”. However, new institutions, such as international biennials, come to the picture, and power relations and hierarchies among players and institutions alter (Tang 2011; Rothenberg, 2012; Gardner and Green, 2013). The geography of this art world also greatly expands, evolving into a global network, even though it is still mainly centered in the U.S. and Western Europe (Harris, 2004; 2013; Stallabrass, 2004; Quemin, 2006; Bydler, 2011).

Arts districts are situated in this contemporary art world that is ceaselessly changing. The role of arts districts in this art world can be interpreted through two aspects. First, the spatial concentration of galleries, or artists, or a mix of both, is said to create both economic and social agglomerations that benefit artists and galleries by facilitating social and business interactions, reducing transaction costs, accelerating circulation of capital and information, and so on (Hutton, 2004; Mommaas, 2004; Molotch and Treskon, 2009; Kong, 2012). Second, arts districts may become well-known and established “art scenes” through stellar artists or sells (Szanto, 2003; Rothenberg, 2012), and their reputations in turn generate symbolic capital (Bourdieu, 1993) for those who are associated with these places and draw in more artists and galleries (Halle and Tiso, 2005; Thompson, 2008; Rothenberg, 2012; Forkert, 2013). The social and economic values of arts districts to artists are summarized by the Chinese artist Huang Rui, who was among the first in initiating 798 arts district in Beijing, in the following way:

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Artists seem to like to stick together – their existence can be lonely and alone, but they’re nonetheless powerful as a collective. There are market-related advantages to clusters too – it’s easier to be represented as a group ... (Huang Rui, quoted in Arnold *et al.*, 2014: 68).

Given the centrality of dealers/galleries in the contemporary art market system (Halle and Tiso, 2005), arts districts potentially assume an important role in the art market, especially those that are primarily occupied by commercial galleries. But their positions also fluctuate according to the changing dynamics of the art market. For example, as it is mentioned earlier, a change in the taste and demand of the market can affect the “fate” of one arts district/neighborhood (Molotch and Treskon, 2009). Moreover, although dealers are still one of the central players in the art market, galleries are gradually losing their importance as *sites* where artwork is valorized and transactions take place. Auctions, art fairs, and biennales are now the other three major channels of art transactions in addition to galleries, among which international art fairs and biennales become increasingly significant (Biggs, 2004; Harris, 2004; Saltz, 2005; Velthuis, 2005; Thompson, 2008; 2011; Tang, 2011).<sup>1</sup>

Art fairs are utilized by dealers to compete with auction houses like Christie’s and Sotheby’s for market share (Thompson, 2011). The competitive advantage of art fairs lies in the convenience they provide to buyers/collectors: one-stop, comparison shopping, and a mall experience, with fashion, art, and fun all blend together in one visit. Art fairs also speed up transactions through creating a “last chance” atmosphere (Saltz, 2005; Thompson, 2011: 64). As major branded international art fairs gain their currency among buyers/collectors, they assume a role of adding value to galleries that attend and to artists whose work shown there. This role of art fairs reflects the discursive meaning of “show worthiness” in today’s art world and art market (Tang, 2011; Thompson, 2011):

Within this field, the exhibition of a work of art is one such enabler of symbolic value – the more prestigious the exhibition, curator and institution, the greater the credibility of the artist and the work in question, and *vice versa* (Tang, 2011: 75, original emphasis).

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<sup>1</sup> *The Art Market 2018* report issued by Art Basel and UBS shows that global wise, 46% of dealers’ sales were made at art fairs in 2017, which was 5% more than that in 2016, and sales at art fairs were estimated to be close to \$15.5 billion in 2017 (McAndrew, 2018: 18). Admittedly, biennales are different from art fairs in the sense that selling and buying rarely happen visibly on the spot, but these two kinds of events both work as markets and generate symbolic capital that can be converted to economic capital sooner or later.



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While galleries used to, and some of them still, function for adding symbolic value to artwork and artists through exhibitions, their positions are increasingly challenged and replaced by spectacular art events such as art fairs and biennales (Biggs, 2004; Saltz, 2005; Tang, 2011; Thompson, 2011). McAndrew, author of *The Art Market 2018* report issued by Art Basel and UBS, notes in an interview with Art Basel how the growing significance of art fairs has affected the behaviors of art collectors and in turn those of galleries:

From the art galleries I've interviewed, many say that they don't see some of the collectors at all anymore. ... A lot of the collector focus has shifted to art fairs, and while I think galleries will always hold exhibitions, some are cutting back (McAndrew in Art Basel, 2018).

What these changing dynamics and organizations of the art market show is that although the image or reputation of a gallery nowadays may depend on both its location (arts districts) and its international exposure through art spectacles, the conversion of such symbolic capital to economic capital for dealers and artists relies more on the latter than the former. It is then necessary to take these changes into consideration in studies of arts districts.

This paper is an attempt to bring together urban land market and art market in a case study of one Chinese arts district – 798 arts district in Beijing. Given this geographical focus, findings of this study have their limitations in terms of being applicable or generalizable to cases in other contexts. However, rather than trying to build a universal explanation, my intentions are first to demonstrate that it is necessary for geographical research on arts districts to attend to these places' roles in both urban land market and the art world and art market at the same time; and second to contribute to understandings of arts districts in the case of China.

## **Arts districts in China**

Existing studies on China's arts districts often pay attention to the aspects of both urban land market and the arts communities and art market in discussing the formation and rise of arts districts in Chinese cities from the late 1990s to the early 2000s (Currier, 2008; Gu, 2012; Ren and Sun, 2012; Zhang, 2017a). Scholars show that the remaking of social contract between the state entities and artists, coupled with the processes of bankrupting or downsizing state-owned enterprises, which provided vacant factory properties, in the late 1990s, led to the emergence of

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arts districts in a few major cities in China (Zhong, 2009; 2012; Gu, 2012). These studies also point out that the success of a few Chinese artists on the global art market and the fame and fortune these artists acquired fueled the establishment and expansion of arts districts during the late 1990s and early 2000s (Ren and Sun, 2012; Zhang, 2017a).

However, many of these studies fall short of attending to the aspect of art market in discussing the changes happened to arts districts in China since the mid-2000s. Research shows that once most of the early arts districts were institutionalized as official “cultural/creative industry clusters” around the mid-2000s, they soon started facing commercialization, displacement of artist and galleries, and “decline” as centers of arts communities (Currier, 2008; Gu, 2012). These changes to arts districts are mainly ascribed to three sets of reasons by existing studies. First, the significance of urban land as a revenue-generating asset for municipal governments under the current fiscal structure (Xu *et al.*, 2009; Lin and Zhang, 2017) is argued to drive some local governments to partner with developers to turn arts districts (and “cultural/creative industry clusters” in general) into real estate projects, causing displacement of artists (Gu, 2012; Ren and Sun, 2012; O’Connor and Gu, 2014; He, 2017). Second, local governments’ active promotion of arts districts as industrial heritage and tourist destinations is found to be a key factor that leads to commercialization of arts districts (Currier, 2008; 2012; Wang, 2009; Zhong, 2009; 2012; Zhang, 2018). And third, government’s tight control of artistic expressions is highlighted as a reason for the diminishing role played by arts districts for arts communities (Ren and Sun, 2012; Zhang, 2014; Zhang 2017a).

Without lessening the impacts that these three aspects have on arts districts in China, I argue that it is also important to address how the art market – both the changes on the global scale and the structure of the art market within China – affects arts districts and contributes to the changes of these places. In a recent study, Jun Zhang (2017b) takes an economic geographic approach to understand the making of China’s visual art market, through which he highlights the rise of domestic contemporary art market within China and the unusual significant role played by auction houses in this market in the recent decade. His study, however, focuses mainly on how the combined forces of market neoliberalism and state authoritarianism circumscribe artistic creativity (Zhang, 2017b), thus misses the aspect of how the structure and organization of art market might affect arts districts. This paper, therefore, aims at filling this research gap by

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examining how the land and property market (in terms of rent) and the art market simultaneously affect 798 arts district and shape its trajectory.

### **Case study and data collection**

798 arts district is regarded as one of the earliest and the most famous arts districts in China. It started as a grassroots artist community in the early 2000s when a group of artists found out that a former military factory compound had spaces open for renting. The factory, Beijing Seven Stars North China Electronic Technology Group LLC (shortened as Seven Stars Group), however, viewed the rental market it opened as merely temporary, for the plan was to sell the whole piece of land to developers (interview with factory manager). Hence during the years of 2004-2005, Seven Stars Group started demolishing buildings and evicting artists, and artists decided to take action to secure their living-working spaces by convincing the municipal government to be their supporter (Currier, 2012; Zhang, 2018). As a result, 798 arts district was institutionalized in 2006, and the municipal and district governments became involved in its management. However, Seven Stars Group is still the manager that oversees most aspects of the daily operations of the arts district (property management, maintenance, marketing, etc.) as well as the landlord, while the office representing the district government in the arts district is only in charge of content and ideological control, namely censorship (interview with government representative, G-1).

Data of this study is mainly from interviews with 25 artists and owners and staff of both commercial galleries and non-profit art institutions and 3 business owners who are currently or were based in 798 (3 of the interviews were conducted in English and the rest were conducted in Chinese). Interviewees were approached through two strategies: (1) a general survey was distributed to all galleries and arts institutions located in 798 in 2014, through which potential interviewees were identified and contacted; and (2) snowball sampling based on interviews and through participating in arts events. These interviews provide both data on the changing rent level in the arts district, and information on the relationship between arts districts and the art market. Interviews with 1 factory manager and 5 government representatives and urban planners

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are used for supplementing the analysis. All interviews were conducted during my field research in Beijing from September 2014 to February 2015, and from July to August 2015.<sup>2</sup>

I also attempted to compile lists of tenants for multiple years in order to examine the turnover rate in the arts district. Since it is close to impossible to obtain a full list of tenants for any year, I combined multiple sources, including list of tenants on the official website of 798 (last updated in 2008), maps and lists of participants of 798 art festivals, and websites on China's contemporary art to compile two lists of art-related tenants in 2008 and 2013. And in August 2015, I conducted a survey of tenants of 798 through visiting and recording the uses of every property that I had access to. In this way, three (inevitably incomplete) lists of tenants are generated for years of 2008, 2013, and 2015.

### **798 arts district as a rental market**

“Commercialization” is a word commonly referred to when people talk about 798 arts district today, both in academic writing (Currier, 2008; 2012; Zhang, 2018) and among artists and gallery owners. When people say that 798 is being or has been commercialized, they usually mean a combination of two things: first, there are more and more commercial spaces and uses in 798 now, which are arguably squeezing out art spaces through both being more economically competitive and changing the atmosphere of the arts district (see Figure 1); and second, rapidly rising rent since its inception in the years of 2002 and 2003. Managers of 798 rebut these two claims by arguing that art spaces and spaces used for “cultural and creative industries” are still the majority in the arts district, and even though rents are rising, they are still lower than the market level of commercial rent (Xu, 2014a): “there are about 400 art organizations among the 600 tenants” (interview with government representative, G-2).<sup>3</sup>

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<sup>2</sup> Interviewees are identified by prefix and number in this article. The identification of each interviewee is based on their roles: “A” indicates artists and gallery owners, “B” indicates owners of not-art-related business, and “G” indicates government representatives and urban planners.

<sup>3</sup> “Art organizations” here loosely refers to galleries, art centers, art institutions, museums, and businesses engaging in “cultural and creative industries”. In an interview conducted with a factory manager in July 2014, the manager provided 624 as the official number of tenants (Mars, 2014).



Figure 1 Commercial uses have arguably been increasing over the years in 798 arts district. Pictured here is a “Gelato Lab” opened in the arts district in August 2015 (photo taken by the author in August 2015)

Data collected for this study might help shed some light on this ongoing debate between members of the arts community in 798 on one side and the district government and factory managers on the other side. Different from the categorization adopted by managers of 798, I distinguish art galleries/institutions/centers from other businesses or organizations that undertake “cultural and creative industries”. My reason is based on that almost all artists and gallery owners that I talked to view these other “cultural” businesses as “commercial uses”. Such businesses include companies that engage in industries such as advertisement, media, design, architecture, and commercial photography and filming. I include art bookstores and art supplies stores, however, in art-related uses for they are important components of arts communities. My compiled (incomplete) lists show that there were 140 and 121 art-related uses in 2008 and 2013 respectively, and 175 art-related uses and 316 not-art-related uses in 2015 in 798 arts districts

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(see Table 1).<sup>4</sup> Among the 140 in the record of 2008, 63 (45% of 140) are still on the list of 2013 and 48 (34% of 140) are on the list of 2015. The changes between 2013 and 2015 show that, out of 121 art-related uses in 2013, 87 stayed till 2015. On average, the turnover rate is around 10% every year.

Table 1 Statistics of tenants of 798 arts district

Year	Art-related uses	Not-art-related uses	Changes from 2008 (art-related uses)	Changes from 2013 (art-related uses)
2008	140	No data	N/A	N/A
2013	121	No data	63 (45%) remain, 34 moved/not existed, 43 unclear	N/A
2015	175	316	48 (34%) remain, 92 moved/not existed	87 (72%) remain, 34 moved/not existed

Source: <http://www.798art.com/>; <http://gallery.artron.net/class/0-0.html>; recorded by author during visit to 798 arts district

Due to the availability of data, it is hard to tell whether, on absolute terms, art-related uses are reducing, or whether, or to what extent, art-related uses are replaced by not-art-related uses. The turnover rate nevertheless suggests a quite unstable composition of art-related tenants in 798, which weakens the function of an arts district in creating economic and social agglomeration benefits (Molotch and Treskon, 2009; Kong, 2012). In addition, even though my survey of the arts district in 2015 was incomplete, the amount of not-art-related tenants clearly outnumbered the art-related ones. The opinion of that 798 is commercialized in terms of the relative presence of art-related uses versus not-art-related ones is thus valid. The visibility of commercialization was even confirmed by a manager of 798 in an interview with a journalist in 2014: “There is no change in the number of galleries in the arts district. ... The reason you think there are more restaurants and cafés might be that they are now more formal than before. In the

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<sup>4</sup> Reason for there seems to be a dip in number of art-related uses between 2008 and 2013 and a rise in number of art-related uses between 2013 and 2015 is that data of these three years are from different sources: data of 2008 is mainly from 798 arts district’s official website, data of 2013 is mainly based on list of participants of 798 art festival, and data of 2015 is collected through my visits that recorded uses in the arts district. Given that not all artists or galleries may be listed on the website or participate in the art festival, these lists of tenants are inevitably incomplete, which makes it hard to compare total numbers of art-related uses across years. Instead, I focus on how many can manage to stay over the years, which helps demonstrate the extent of stability in the arts district.

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past, these places were smaller thus harder to be noticed” (Xu, 2014b; original in Chinese, translations are mine).

All parties agree on that rent in 798 has been rising since 2002, but that is tied to the broader trends in Beijing’s real estate market overall. Disagreements lie in whether rent in 798 should keep up with the whole market, and whether it already matches the market level. Table 2 below presents rent data of 2014 provided by the managers of 798. A quick search online (<http://shop.fang.com/zu/house-a01-b054/>) reveals that rent for a storefront or commercial space in the surrounding area (Jiuxianqiao area in Changyang district of Beijing) would be ¥6-12/m<sup>2</sup>/day, which seems to indicate that the rent level of 798 is still lower than the market level.

Table 2 Rent level of 798 arts district in 2014

Tenants	Rent
Commercial	¥5-6/m <sup>2</sup> /day
Gallery	¥3/m <sup>2</sup> /day
Art institute	¥5-6/m <sup>2</sup> /day
Artist studio	¥2/m <sup>2</sup> /day

Source: Table in Mars, 2014

Note: In 2014, the currency conversion rate is about \$1 = ¥6.15

Rent data that I collected through interviews with artists and gallery owners, however, presents a different picture, and also a much more complex rental structure than the one provided by the managers. First, rent level varies not only according to the type of tenants, but also on a case-by-case basis. Not all galleries pay the same rent, and none of those that I interviewed in 2014 paid their rent at the level of ¥3/m<sup>2</sup>/day. In fact, to some of them, the rent level surpassed that amount years before 2014. For example, the owner of a small commercial gallery, which is one of the few managed to stay in the arts district since the early 2000s, told me that between 2005 and 2014, their rent changed from ¥1/m<sup>2</sup>/day to more than ¥10/m<sup>2</sup>/day (interview with gallery owner, A-1). And a staff that represent a foreign gallery, which left 798 arts district around 2010 largely due to the rising rent, said that the rent was already as high as ¥8/m<sup>2</sup>/day during 2005-2006 (interview with gallery staff, A-2). Second, the length of the lease, hence the frequency of the increase of rent, also varies among tenants, even if they fall in the same category:

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Rent varies from one to another. It is necessary to maintain a good relationship with the property management office, for in turn you get a longer lease and a stable rent. My lease is valid until 2020, so my rent won't be raised until then (gallery owner of a small commercial gallery, A-3).

Artists who rent spaces in 798 as studios or exhibition spaces tend to pay a lower rent than commercial galleries, which confirms the rental scheme provided officially. However, the official ¥2/m<sup>2</sup>/day rent level is also hard to find. An artist (A-4) who moved to 798 in the late 2000s told me that she needs to renew her lease every 3 years and the rent was raised from ¥3/m<sup>2</sup>/day to ¥5/m<sup>2</sup>/day in her second lease. She estimated that her studio space cost her about ¥1,000 every day in 2014 (including electricity, heating, etc.). However, many artists, especially younger and emerging ones, cannot afford such expense even though rent is arguably much lower than the one paid by commercial galleries. Some of them thus choose to share space in the arts district: “since this is an exhibition space shared by a group of artists, and not really a commercial gallery, the rent is ¥5/m<sup>2</sup>/day” (artist, A-5).

Overall, rent level in 798 is very close to, if not already matching, commercial rent in the surrounding area. In this sense, 798 is a commercial rental market. To the factory managers, rent level of 798 should keep up with the market level as galleries are “merely business clients to them” (interview with gallery owner, A-1) and “their goal is purely to collect rent, not to support art” (interview with gallery staff, A-2). Furthermore, Seven Stars Group is neither required nor encouraged by the municipal or district government to set a lower rent for artists or galleries. The government representatives I talked to made it very clear that the district and municipal governments will not intervene in the issue of rent for “it is Seven Stars Group's property, and we (the government) cannot control how much they charge” (government representative, G-1).

The behaviors of the property management office of Seven Stars Group show how the landlord role is enacted by the factory:

I know many artists are discontent with the rent. But it's not necessary. I've seen people from the property management office forcefully evict those who cannot afford the rent. The weak cannot contend with the strong (artist, A-4).

They (the property management office) would only sign short lease with people, mostly one to two years. Only big commercial galleries or art institutions can have longer lease. When the lease is about to expire and it is time to renew it, they would re-negotiate the rent, meaning, raise it. While they are having the rent negotiation with tenants, they would release information that the spaces undergoing lease renewal are available, in order to pressure tenants to accept the new lease and higher rent (artist, A-5).



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The reason for Seven Stars Group's indifferent attitude and to some extent aggressive behaviors towards artists and galleries is that 798 arts district has been very attractive to commercial uses and the factory managers would not need to worry about finding tenants. Most of the artists, gallery owners and staff, as well as business owners that I talked to mentioned that it is now close to impossible to "rent a space through the public channel" (artist, A-5) and "you have to know someone in the property management office in order to secure a space" (business owner of a bookstore, B-1). In turn, some would hold onto the space they rent for as long as possible and sublet it to earn profits from the differences between the rent they charge their subtenant and that they pay to the property management office. Although Seven Stars Group states that subletting is not allowed and has brought some of those who violate this clause in the lease to lawsuits (see Figure 2), the subletting market is still active. And as the gallery owner A-3 said above, if tenants can maintain "a good relationship" with the property management office, they can avoid facing lawsuits even if they sublet:

We rent this one from someone who has a lease with 798. We don't really know who this person is. We just have to trust each other. There are many here like us who rent from someone else, because it's impossible to rent one directly from 798. Those shown in the property management office are rarely truly available (business owner of a small art printing company, B-2).

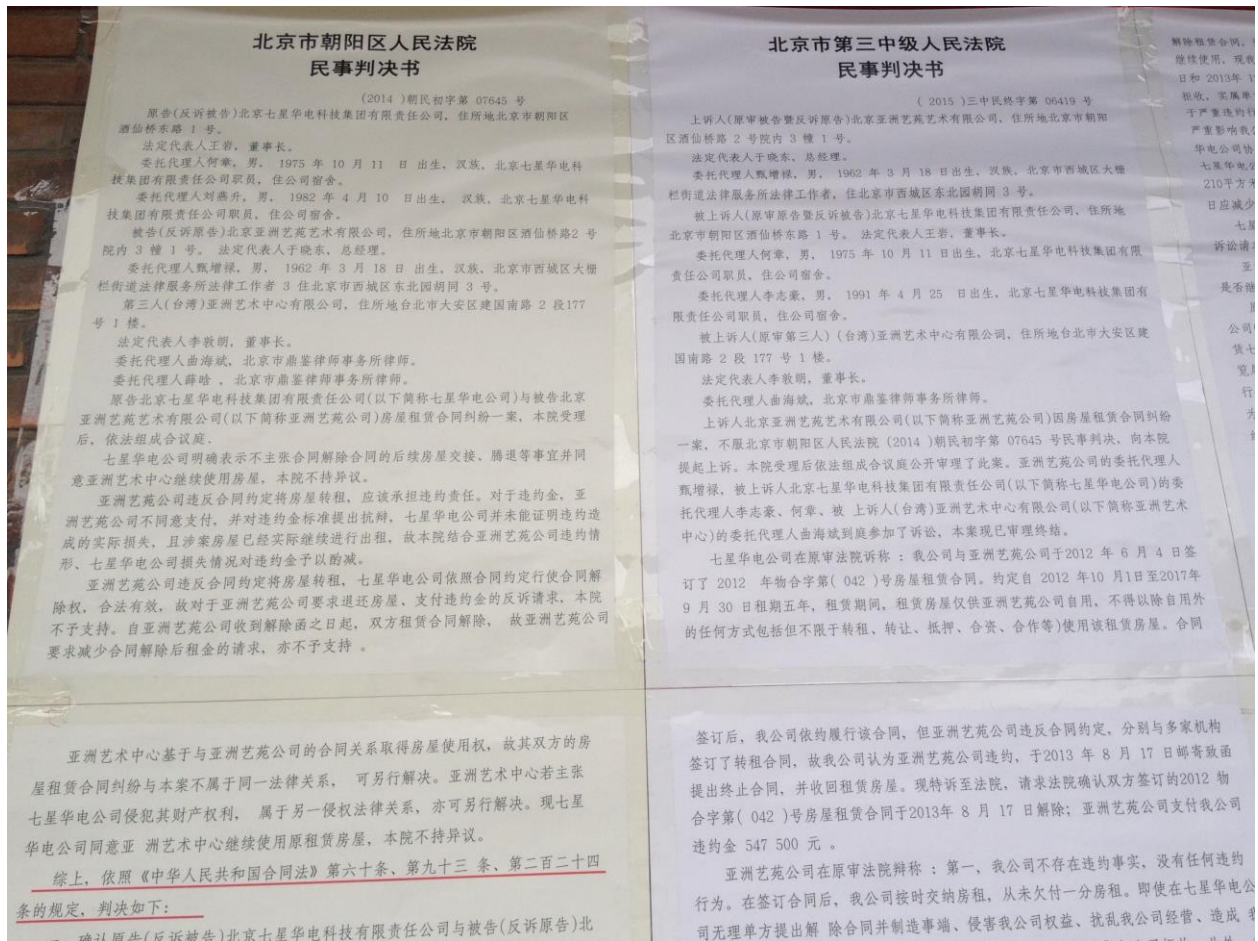


Figure 2 Verdict from Chaoyang District People's Court on a lawsuit between Seven Stars Group and a company that sublet its rented spaces, posted in 798 arts district (photo taken by the author in August 2015)

While some of the commercial uses are attracted to 798 arts district for their businesses have a close relationship with the production, consumption, and circulation of art, such as the business owner B-2 above, some choose the arts district due to “the crowd it can attract” (business owner of a restaurant, B-3). The popularity of the arts district as “a place to be” can also be seen in that it is now often used as a venue for commercial campaigns, fashion shows, and reality TV shows. Such popularity is partly a result of artists’ earlier strategy in convincing the municipal government that the arts district should be kept, which highlighted the tourism value, among other aspects, of the place (for details, see Zhang, 2018). 798 arts district hence is turned into and promoted as a tourist destination, which draws tourists and visitors and subsequently commercial uses (Currier, 2008; 2012; Zhang, 2018).

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In response to the pressure of rising rent, some artists and galleries take advantage of the popularity of 798 and develop side-businesses to bring in extra revenue. These businesses might be as small as selling postcards and souvenirs and opening cafés in galleries, and as big as renting out their spaces temporarily for commercial campaigns and events (see Figure 3; interview with staff of a commercial gallery, A-6). However, consequently, these artists and galleries contribute to and become part of the commercialization process taking place in 798.



Figure 3 An arts center in 798 was used for a fashion event (photo taken by the author in December 2014)

### **798 arts district in/for the art market**

Rising rent, stronger presence of commercial uses, and touristy atmosphere are often cited as the reasons for 798 arts district's decline as a place for art. While many artists and galleries are forced out of the arts district for they can no longer afford a space, those who stay

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argue that the changing atmosphere of 798 makes the arts district much less attractive to art buyers, collectors, and dealers. According to several artists, gallery owners, and gallery staff, in the early to mid-2000s, 798 arts district, as “the core of the art circle” (artist, A-7), provided chances for galleries to build relationships with new buyers and collectors. But by 2010, 798 arts district’s function as a place for art business waned (interviews with owners and staff of commercial galleries, A-1, A-2, and A-8). Visitors of the arts district are no longer “art consumers” (gallery owner, A-1), but mostly tourists or “young people who go there for fun” (artist, A-7).

However, the above reasons are not the only factors that cause the weakened status of 798 arts district in the art market. Some artists and gallery owners point out that changes to and structures of the art world and art market are also playing key roles. First, the financial crisis of 2008 impacted the art market, which reduced demand for Chinese contemporary art and pushed some galleries out (Lu, 2016; interview with artist, A-4; interview with gallery staff, A-2; interview with gallery owner, A-3; interview with director of a non-profit art institution, A-9). And second, the fact that art market in China is still relatively underdeveloped and has yet to be fully formed around the “artist – gallery/dealer – collector” structure affects the business of art galleries and the situations of arts districts as well (Lu, 2009; interview with staff of a commercial gallery, A-10). Art market in China is said to be characterized by mass existence of galleries that are not interested in developing professional relations with either artists or collectors for many of them “get into this business just for quick profits” (gallery staff, A-2) and “have no idea how the art market actually functions and only treat it like any other businesses” (gallery owner, A-8). As a result, on one hand, many artists have very little trust in galleries overall and would rather sell their works directly from their studios, which makes it hard for some galleries to stay in business:

I decided to find a space here as both my studio and an exhibition space for I wasn’t satisfied with my collaboration with galleries. Their economic pursuit sometimes impinged on selling my works. I have my own space to show my works now, and I have the freedom to interact with collectors directly (artist, A-4).

Many galleries cannot make any profit because they don’t know how to set the price or how to nurture their relationships with their artists. ... When a gallery doesn’t know how to maintain its relationship with its artists, it ends up doing free promotion for those artists without earning anything from it (gallery owner, A-8).

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And on the other hand, the secondary market (auction houses) seizes the market share that should belong to the primary market (galleries/dealers) in China's art market as many art collectors "cannot trust the price set by galleries" (gallery staff, A-2) and choose to rely on branded auction houses instead.<sup>5</sup> The entanglement between the art market and financial market and the speculative nature of art collection (or investment), which have become increasingly evident on a global scale (Stallabrass, 2004; Thomposon, 2008; Graw, 2010; Sholette, 2011; Rothenberg, 2012; A. Harris, 2013), also shape the art market in China and reinforce this fixation with trustworthy price setting, and in turn, weaken the statuses of galleries and arts districts in the art market (interview with gallery owner, A-8).

In addition, as discussed earlier in this paper, international branded, speculative art events, especially art fairs and biennials, are increasingly replacing gallery spaces and arts districts as *places* where symbolic capital of artwork is generated and where the selling of art is happening (Biggs, 2004; Saltz, 2005; Tang, 2011; Thompson, 2011; McAndrew, 2018). Artists, curators, dealers, galleries, and local governments in China have also been pursuing such platforms, which is exemplified by the massive amount of satellite exhibitions organized by Chinese artists, curators, and institutions in the 2013 Venice Biennale and the growing numbers of art fairs, biennales, and triennials hosted by municipal governments in China (Tinari, quoted in Guan, 2015; Lu, 2016; 2017). The fact that businesses seem to be losing interest in 798 can also to some extent be interpreted as the consequence of the changing ways that the art world and art market function:

Galleries now are busy with art fairs around the world. What is going on in the art space and in the arts district is less and less important (director of a non-profit art institution, A-11).

While rising rent and changing atmosphere may have caused the departure of artists, the reason for galleries and art business to leave 798 might be more complex. Certainly, rent and atmosphere still play roles in driving some galleries out, and the loss of artists and galleries affects whether the arts district can maintain its attraction to art business. But the state of China's art market and the competitions that gallery spaces face from auction houses, art fairs, and art

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<sup>5</sup> McAndrew in her interview with Art Basel (2018) also notes that the dealer market in China is small and growing at a slow pace while the auction sector has grown better. And Zhang (2017b: 2039) points out that state's support of auction houses is another factor that makes it hard for the "artist – gallery/dealer – collector" structure to form and function in the art market in China.

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biennales as places for art business also have an impact on the arts district and its role in the art market. And the influence of the 2008 financial crisis needs to be taken into account as well. All these factors play into shaping 798 arts district, and it is hard to identify one as the single major reason for the declining attraction of 798 to art business.

Despite the arts district's weakened status as the place where selling happens, 798 continues to play a meaningful market role for many of the arts community due to the symbolic capital it could generate. The image and reputation of 798 arts district as "the center of Chinese contemporary art" (gallery staff, A-6) established earlier ensure that 798 still functions as an "enabler of symbolic value" (Tang, 2011: 75) in the art world and the art market:

Artists still want to have solo shows in 798. It doesn't matter if there's anyone coming or buying their works here. They need something like that on their résumés (artist, A-12).

We want to get a space here because we think 798 is still a center where art-related people come to interact. Having a space here would increase our chances of interacting with other institutions. I think we and our works do receive more exposures here, and we definitely have received more invitations from galleries to be part of their shows. So being here and being able to be seen are important. Selling hasn't got better, but that's related to the larger (market] environment (artist, A-5).

It can be argued that precisely because 798 arts district no longer assumes an important role for the production and transaction of art, its role for generating symbolic capital might even be strengthened. Although it is hard to tell to what extent symbolic capital generated by arts districts, and by 798 in particular, still matters and for how long it would continue to matter, given the significance of art fairs and biennials nowadays (Tang, 2011; Thompson, 2011; McAndrew, 2018), the quotes above demonstrate that many in the arts community would have a vested interest in maintaining or even speculating in the value of 798 as a generator of symbolic capital. One artist puts it in the following way: "there are many who are interested in extracting the 'surplus value' of the arts district and speculating in the value of the arts district for profiting in the art market" (artist, A-13).<sup>6</sup> The case of 798 arts district thus is another example of how the practices, strategies, and logics of finance are adopted in the world of contemporary art (A. Harris, 2013).

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<sup>6</sup> My case study of Huangjueping arts district in Chongqing shows a similar tendency.

## Conclusion

Through a case study of 798 arts district in Beijing, this paper demonstrates that arts districts are places that are exposed to and shaped by the dynamics of urban land market and art market simultaneously, and changing situations of arts districts cannot be purely explained through one market logic or the other. An arts district's position in the art market could affect its value in urban land market, which might subsequently change the arts district's status in the art market. In this case study, the reputation of 798 arts district as "a place to be" in and beyond the arts community attracts attention and crowds, which makes it possible for the landlord (Seven Stars Group) to charge higher rent. As 798 arts district turns into a commercial rental market, rising rent and changing, namely more commercialized and touristy, atmosphere both play roles in squeezing out artists, galleries, and non-profit art institutions, which reduces the attraction of 798 to art business. However, an arts district's status in the art market might also shift as a result of changing tastes, structures, and power-relations among actors of the market. The declining significance of 798 as a place for art business is influenced by a combination of factors such as the financial crisis' influence on the art market, the situation of China's art market, and the growing role of art fairs and biennales in the art market, in addition to increasing rent and changing atmosphere of the arts district. To explain changes to any arts district, thus, needs to pay attention to the influences of both urban land and art markets, the relative significance of which is always contingent.

This examination of 798 arts district through its dual market roles also contributes to understandings of "the spatial stickiness of art scenes" (Bain, 2018: 848). In many cases of arts districts or neighborhoods, with artists and galleries being displaced due to unaffordable rent, art scenes disappear and may relocate (Mathews, 2008; Molotch and Treskon, 2009; Harris, 2012), which is partly the case in Beijing: rent increases in 798 have led to the emergence and growth of grassroots artists communities in areas surrounding 798.<sup>7</sup> However, 798 still persists to be more or less an arts district. The spatial stickiness of this art scene could be due to the fact that 798 is still affordable to big commercial galleries and art institutions, such as Pace Beijing, Galleria

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<sup>7</sup> Among these artists communities, the most famous ones are Caochangdi, Heiqiao, and Huantie. However, these three have all faced demolition, partly because they never fully received official recognition by the municipal or district government.

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Continua, Tang Contemporary Art, Long March Space, and Ullens Center for Contemporary Art, to name a few. And as it is pointed out by an artist quoted earlier (A-5), these galleries and art institutions also tend to have longer and more stable lease with Seven Stars Group. What this paper highlights in particular, nevertheless, is that the belief and speculation in the value of an arts district as a generator of symbolic capital in the art market could be another reason for the spatial stickiness of an art scene. Due to such belief in the value of 798, which is arguably partly drawn its strength from the continuous presence of above galleries and art institutions in the arts district, many artists and smaller galleries still pursue the potential exposure they can get in 798 and in turn help maintain the art scene.

(Some of) the arts community's investment in the value of 798 arts district in/for the art market has an impact on 798 as a rental market as well. Seeking being seen in 798 leads to attempts at both being exhibited (for artists) and having a space (for artists and galleries) in the arts district. Since the latter is now quite difficult for many artists and galleries to achieve, two strategies in response to this situation can be identified. The first one, as mentioned earlier in the paper, is to develop side-businesses including occasionally renting out gallery/art spaces for commercial uses in order to bring in extra revenue to pay the rent. And the second one is to aim at renting a space only for a relatively short period of time and maximize publicity opportunities during that time, given the fact that most leases are for 1-2 years and that renting for longer term is hard to afford (interviews with gallery staff A-6 and artist A-7). Although artists and galleries are forced to opt for such strategies, these behaviors would strengthen the factory managers' impression of the arts district as a place that is attractive and inevitably drive up the rent further. Bain (2018) finds that artists may choose to take on roles of property owners and small-scale developers for spatially stabilizing an art scene. It is less clear in her case study to what extent the pursuit of possible symbolic capital generated by an art scene may motivate such choice. In the case of 798, though, it can be argued that the perceived value of the arts district as a generator of symbolic capital plays a significant role in driving those two strategies, which potentially further destabilize the rental market of 798. Spatial stickiness of an art scene thus does not necessarily suggest stability of or within the art scene.

While existing geographical and urban studies of arts districts have shown that an arts district's status in the art market can affect the land and property value of the place (Deutsche and Ryan, 1984; Zukin, 1989; Harris, 2012; Ren and Sun, 2012), most of these studies take the



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approach of art-led gentrification, which suggests there is a lack of diversity in geographical research of arts districts. Findings of this study demonstrate that attending to the role of arts districts as being simultaneously positioned in urban land and art markets could help generate more research questions and diversify this research area. For example, it might be worth looking into how the changing organization and structure of the art world and art market in the recent decade have affected certain arts districts as places for art business, and how and whether it in turn impacts the land and property value of these places and what the subsequent outcomes are. In addition to criticizing the thesis of art-led gentrification for its limitations, it might also be worth asking: If an arts district does not lead to increasing land value, does it necessarily assume lower value in the art world and art market as well? What would changing dynamics of the art market, combined with low land value, shape such kind of arts district and its role in the city? To this end, I argue that it is necessary to introduce the voices of art historians and art critics into studies of arts districts as urban places. A transdisciplinary collaboration that engages with ideas and critiques developed in both sides would help build better understandings of urban configurations of the arts. And such engagement certainly should also include the situated knowledge of artists and other practitioners of the arts community.

## **Acknowledgements**

This research was supported by the IJURR Foundation Studentships within the field of urban and regional studies, and the Pruser Dissertation Enhancement Award from the Graduate School of Geography, Clark University. Thanks to all of the research participants who generously shared their opinions with me. And thanks to Deborah Martin, Yuko Aoyama, Mark Davidson, three anonymous referees, and IJURR editor Matthew Gandy for providing feedback to earlier versions of this work, and to Murray Mckenzie for introducing me to the literatures on contemporary art market. All errors and omissions are mine.

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