Gallery districts of Barcelona: the strategic play of art dealers

This article focuses on Barcelona's art market to explore the underlying factors behind the clustering of art dealers in several of the city's districts. Drawing upon quantitative and qualitative data, the article analyses how such clustering reveals a strategic action in the sense attributed to it by Crozier and Friedberg (1981). Gallery districts are not a reflection of structural factors (economic, urban development-related or social) but the result of a combination of strategic choices – either individual or collective – which explain the permanence of leading gallery districts or the emergence of new ones.

Keywords: gallery district, art dealers, art market, urban space, sociology of arts, strategic play.

Introduction

The fact that art dealers tend to set up gallery districts has already been demonstrated by several studies (Moulin, 1992, Simpson, 1981m Halle and Tiso, 2007, Kim, 2007, Molotch and Treskon 2009). More specifically, art galleries tend to cluster along certain streets of big cities; for example, in Paris, they can be found in Rue Laffitte (Right Bank), rue des Beaux Arts (Left Bank) and Rue Vieille du Temple (Marais); in New York, galleries cluster around 57th Street (Midtown), 10th Avenue (Chelsea) or Washington Street (Dumbo - Brooklyn).

However, even though some social scientists have analyzed the clustering of art galleries within specific urban areas, they have explained this phenomenon mostly in economic terms, arguing that such clustering facilitates and increases the chances of attracting art buyers (White 1991; Moulin 1983 and 1992). More recently, the emergence of art districts has been seen as a way of bringing together new generations of artists, art dealers, as well as the middle classes who are attracted by the lure of such artistic milieu (Simpson 1981; Zukin 1989; Kostelanetz 2003), and their gentrifying effects (Deutsche and Ryan 1984; Ley 2003; Cameron and Coafee 2005). Some studies were recently made of gallery districts, relating their emergence and decadence not only to the price of rent but also to the prices of the artworks sold (Molotch and Treskon 2009) and also to the evolution of gallery districts, in consideration of many factors, including the distribution of the artist population, urban planning policies, the revaluation of traditional patrimony and the appearance of tourism (Kim, 2007).

In these cases, the economic factor remains predominant in explaining gallery districts, but it is also becoming apparent that other factors of a cultural, symbolic and social nature should also be considered, along with others associated to the profession of gallery ownership. In this regard, Pierre Bourdieu (1977 and 1995) has interpreted his concentration of art galleries as a transfer to the urban space of the social structure and oppositions of the art world: the emergence of avant-garde galleries that are spatially separated from commercial galleries expresses the structure and oppositions of the art world that typified cultural modernity until the late 20th century. These oppositions were gradually weakened by the post-modernist redefinitions of the rules of art (Rodríguez Morató 1999) in which arts districts became the centers for new Bohemianism associated to new leisure centers and the new digital economy (Lloyd 2006).

Despite the importance of these studies, there are still a number of issues that remain largely unexplored. Such studies have focused on examining the determinant factors - in a structural or objective sense - of gallery districts (rental and building work costs, urban change processes, structure of the artistic field). Nevertheless, this article proposes using the approach and methodology of Crozier and Friedberg (1981) in the sense that the determining factors do not explain the individual strategies and that it is necessary to globally understand the game rules of each social field. Other authors have used this sociological approach in the field of the artistic profession (Menger, 1994); otherwise it had never been put into practice in the field of the relationships between art dealers and gallery districts.

The implementation of the concepts from Crozier and Friedberg (1981) helps us understand that art dealers make up a social field or system where there exist rules and determining factors as stated above, but each dealer, according to their own resources (economic capital, social network, etc) has a margin of freedom to choose their artistic district. This artistic district will offer possibilities and difficulties for the development of a medium- and long-term strategy. And it is also important to understand that the strategic choice of an artistic district entails to join forces – in a more or less organized way – with other gallerists and leads – as theorized by Friedberg (1993) – to non-formal alliances in order to achieve common goals, that is, attracting buyers and earning prestige within the gallery world.

We will take the following two hypotheses as a starting point: First, that urban areas are one of the key elements in the gallerist's strategy, and that the choice of a gallery district is part of a global positioning strategy within the Art market. Secondly, that the gallery world is a hierachical one where the leading gallerists cooperate in order to keep control on the local market, whereas gallerists from emerging areas join forces in order to reverse this control. In some cases - as in Chelsea (New York) - these strategies are successful so a great part of the dealers opt to move; Halle describes this as 'leapfrogging'[1]. In some other cases, dealers from emerging areas do not succeed in setting themselves up as a leading gallery district so theirs becomes a poor strategic choice - a 'wrong-turn' (ibid.).

On a methodological level, this approach has driven us to organize, in a first moment, the art galleries into a hierarchy in order to set up a hierarchy of gallery districts. Secondly, following Crozier and Friedberg (1981), we have used the qualitative interviews with a representative sample of dealers as expressions of strategic choices by the various kinds of dealers with regard to gallery districts.

This article focuses on Barcelona's art market. The development of its art market has received very little study other than a few studies of a historical (Parcerisas 1992, Torres 1993) or purely economic (Aguilar and Laporte, 1996; AAVC, 2006) nature, in neither case considering the art districts in the city. This is despite the fact that Barcelona follows Madrid as the second most important city in Spain's art market.

Although it has a much smaller art market than other European capitals (Laporte, 1995; AAVC, 2006) it is relevantly dynamic in artistic terms and features a major density and diversity of art galleries. This is reflected in an urban configuration with a wealth of art districts, which has enabled us to make a quantitative and qualitative analysis of the art districts and the dealers operating in them, on the basis of which we can make an in-depth analysis of the different dimensions of the phenomenon of concentrating galleries in art districts.

The article is divided into three parts. Firstly, we will analyze the development of the art market in Barcelona and how it has been structured into different art districts. Secondly, on the basis of our study of the population of art galleries, we will analyze the hierarchy and different groups of importance in the gallery districts. Finally, we will test our hypothesis that art galleries cluster in the art districts as a result of individual and collective strategies, on the basis of interviews with fifteen gallery owners who are representative of the various gallery districts of the city.

Barcelona's art market: Genesis, development and urban configuration

Barcelona[2] saw the opening of the first art galleries in Spain. Its first art gallery, the Sala Parés, was founded in the narrow streets of the city's historic centre in 1877, and displayed modernist art and to this day displays traditional figurative art. From the 19th century to the early 20th century, the art market was therefore grouped around Calle Petritxol (in the centre of medieval Barcelona, the Gothic Quarter), forming a single gallery district. In the early twentieth century, some thirty galleries began to locate in the centre of the Eixample, following in the steps of the Bourgeoisie, who were moving into this new district. That was the case with the famous merchant Josep Dalmau, who after moving to the Gothic Quarter in 1906, moved in 1923 to the centre of the Eixample, where (and without much sales success) work by such leading avant-garde artists as Joan Miró, Francis Picabia and Salvador Dalí were displayed (Parcerisas, 1992). In this regard, Barcelona reproduced the structure of modern art analyzed by

Bourdieu and exemplified by Paris (1977), whereby the Gothic Quarter concentrated traditional art and the Eixample was the place for the modern art scene.

But the birth of Barcelona's modern art market, as it is known today, took place in the 1960s (Torres, 1993); a late start due to the Spanish Civil War and the country's post-war repression, in comparison to other European cities. In 1944, there were only 19 art galleries in Barcelona (Pujadas, 1995). However, in the 1950s, the Gaspar gallery, the first to set up in Calle Consell de Cent provided the first opportunity for Antoni Tapies to exhibit his work, displayed work by Joan Miró and managed to attract large numbers to a Pablo Picasso exhibition despite censorship by the Franco dictatorship. So, in the seventies the modern bipolar structure of the art market was consolidated after being truncated by the Spanish Civil War (1936-1939). Although the great artists that have been related with Barcelona (among others, Salvador Dalí, Joan Miró, Pablo Picasso and Antoni Tapies) forged their artistic careers outside of Barcelona, with foreign dealers, these artists often supported the local art market through exhibitions or assistance for dealers. This shows why, in the 1960s, there were as many as 37 galleries, of which 65% were located in the Eixample (Torres, 1993). In 1962, the Sala René Metras opened next to the Sala Gaspar, positioning Consell de Cent Street (near the center of Eixample) as the center of Barcelona's art market. This dealer promoted young Barcelonan artists and in the seventies would exhibit such internationally acclaimed artists as Yves Klein, Henri Michaux, Andy Warhol, Lucio Fontana, Max Ernst, Victor Vassarely and Antonio Saura, thus setting the standard for contemporary art in Barcelona.

This first group of contemporary art galleries (Galeria As, Galeria Gaspar, Galeria René Metras and Galeria Belarte) expanded and eventually brought together dozens of galleries in the heart of the Eixample. Close to the shopping and business area, it is a relatively quiet area where collaborations between galleries were forged in order to attract buyers, as noted by Moulin (1992) in relation to the Parisian art market. It was also associated with modern art and therefore different from the traditional art dealers, in the medieval center (Gothic Quarter), and opposition was established between traditional, figurative and abstract art.

Subsequently, the art market has experienced considerable growth, going from 37 galleries in 1962 (Torres, 1993) to 140 by 2005 (Department of Culture, 2006). Art galleries have moved to other districts. Towards the north of the city, which is the site for the headquarters of large corporations and the upper-class residential area (Sarrià-Sant Gervasi), to new districts populated by the intellectual middle class (The Born and Gracia), and to El Raval's bohemian district. In this latter neighborhood, the gallery district emerged along with the inauguration in 1995 of the Barcelona Contemporary Art Museum (MACBA) and the process of constituting a cluster of art institutions and industries (Rius, 2008). Therefore, the Barcelonan art market would have different centers, a traditional one (Gothic Quarter), a dominant one (Consell de Cent), another dispersed in the high class neighborhoods (Sarrià-Sant Gervasi) and another in emerging neighborhoods (Gràcia, Born and Raval).

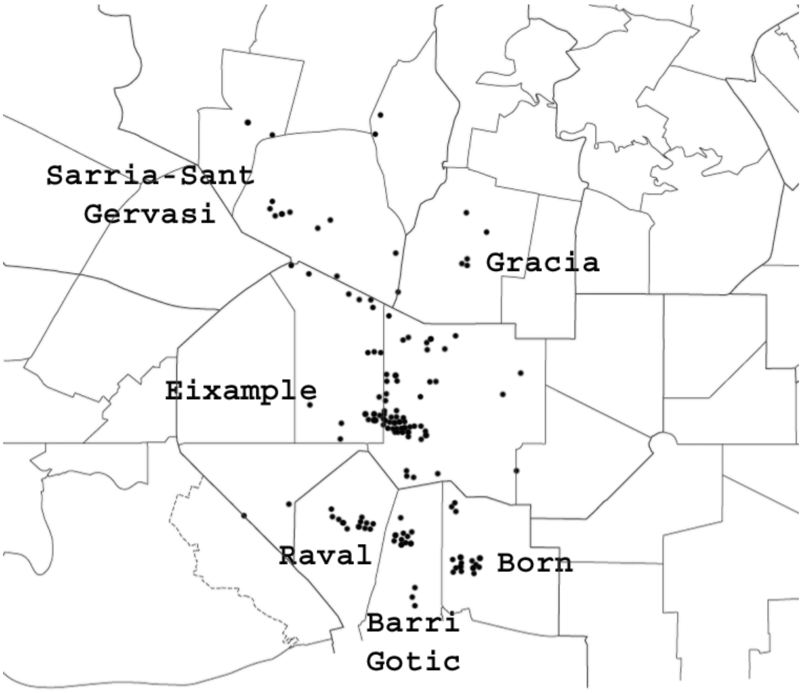
Having analyzed the historical development of Barcelona's art market and its configuration in the city's geographical space, in what follows the article presents quantitative data to help elaborate on the prestige and importance of art galleries.

Urban space and the hierarchy of Barcelona's art market

Until the nineties, Barcelona had shared the leadership of the Spanish art market, Barcelona being the most avant-garde city while the market in Madrid was more associated to tradition (Ramoneda 1997). However, from the nineties, Barcelona started getting left behind in the art market[3]. There were different reasons, but we could highlight the fact that from the transition to democracy in the late seventies, Madrid concentrated the main State-financed art institutions[4] and the major financial institutions and corporations, and this was where the major cultural foundations had their head offices. The purchase by these of the galleries located in Madrid along with the relative success (more in terms of visitors than sales) of the Madrid International Art Fair ARCO, explain this change of artistic centre in Spain (Rius, 1999). This is reflected by the way the city of Madrid concentrates 23% of the galleries, Barcelona 16%, and the remaining cities are well below, with Valencia having 7% and Palma de Mallorca having 3% (UAGAE, 2002).

However, the capital of Catalonia, despite not enjoying assistance from the Ministry of Culture and its institutions, has maintained its local art market with a total of 140 art galleries, spread across different districts of the city[5]. The census conducted by our study shows that 15% of the galleries were in Sarria-Sant Gervasi, 7% in Gràcia, 46% in Eixample, 34% in Ciutat Vella (of which, the Barri Gotic represents 13%, the Born 11% and the Raval 9%). In contrast, the study found no galleries in peripheral working class neighborhoods (Sant Martí, Sant Andreu, etc.) which follow a pattern that is common to many other European cities. These data suggest a high degree of concentration. But if we take into consideration the hierarchy of importance of art galleries on the basis of a scale constructed from 17 indicators,[6] we find that the concentration of the most important galleries is even higher.

Figure 1 – Map of art galleries in Barcelona



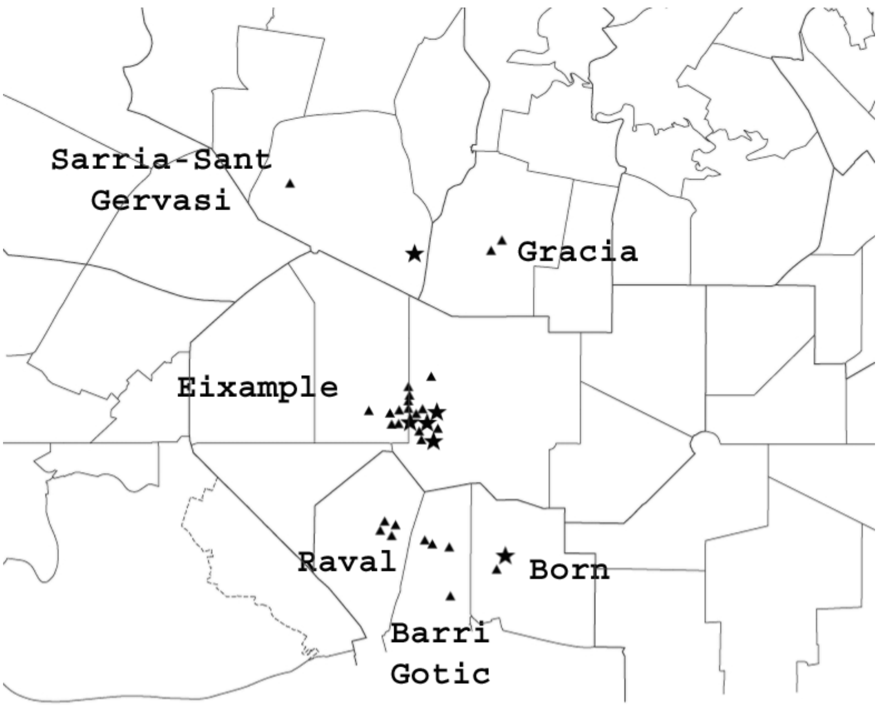
Legend: art gallery ●

Source: Rius, 2003

Overall, this hierarchy led us to define three major groups: the 'low importance' group includes local galleries of little prestige and professionalism on a local level; the 'medium importance' group includes galleries that were once important but that have seen their importance diminish, and young emerging galleries with a good background but that have yet to reach the peak of the gallery world; and the 'high importance' group only includes elite galleries with a national and international reputation in the art market.[7]

Art galleries are spread throughout the urban districts mentioned. However, art galleries of medium importance are located 3% in Sarrià Sant Gervasi, 10% in Gràcia, 31% in Ciutat Vella and 56% in L'Eixample. High importance galleries are concentrated in the Eixample (72% are located in this neighborhood) and only very few are located in other neighborhoods (14% in Ciutat Vella and 14% in Sarrià-Sant Gervasi).

Figure 2 – Map of medium and high importance art galleries in Barcelona

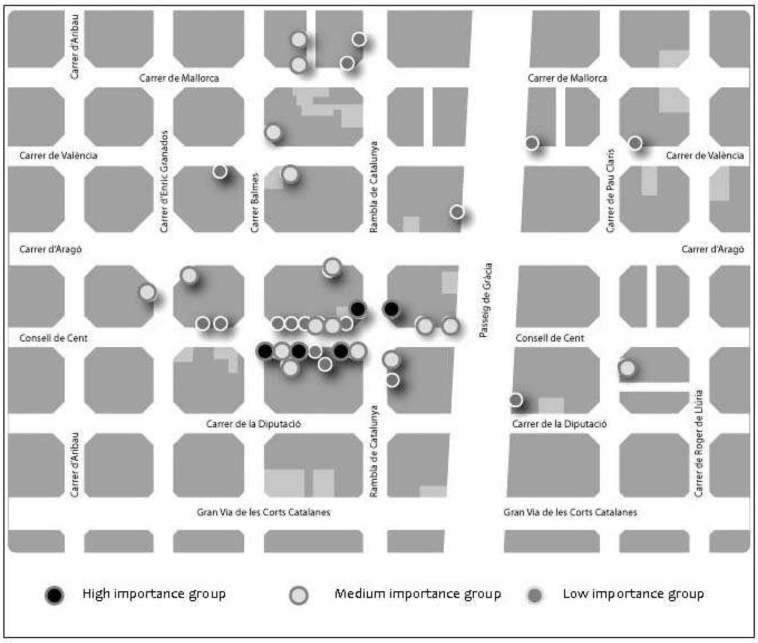


Legend:
High importance art gallery ★
Medium importance art gallery ▲

Source: Rius, 2003

As seen on the street map below, the core of Consell de Cent has a cluster of 22 art galleries. Just four blocks take up 28% of medium importance and 71% of the most important art galleries. By contrast, urban spaces considered to be emerging areas contain only one gallery of high importance**.**

Figure 3 –Art Galleries in Consell de Cent (Eixample District - Barcelona)



Source: Rius, 2003

Data from the Department of Culture (2006) shows that while in Barcelona the average turnover of an art gallery does not exceed €320,000, Consell de Cent has more than three galleries that have declared income in excess of €2,000,000. The average difference between zones is remarkable: while in Consell de Cent the average is €545,000, in Ciutat Vella it is €291,000 and in other neighborhoods it is just €204,000. Currently, art galleries in Consell de Cent represent 58% of the turnover of all of the galleries in Barcelona. Therefore, this area not only concentrates the most prestigious galleries but also an important percentage of the art market in Barcelona.

The data presented so far suggests that geographical space maps out the various levels of prestige and importance of art galleries, especially of dominant and marginal art galleries. However, art galleries of medium importance, which are not located in the central gallery district, do not respond to the pattern shown where economic and commercial elements play a very important role in the geographical positioning of galleries in Barcelona's urban space. In what follows, this article explores further the reasons behind the geographical positioning of art galleries within specific urban areas. The main question pursued here is whether art dealers identify factors other than economic and commercial, that influence their choice of geographical locations, urban spaces, where to pursue their businesses.

Urban space, professional field and strategic choice

Methodology of qualitative survey

We designed the fieldwork to cover for the diversity of types of art gallery in Barcelona (see following table): the traditional figurative art gallery owner, located in the historic centre since many decades ago or in the major avenues of the Eixample (interviews 5, 7 and 11), the modern art gallery owners (first and second period avant-garde) located since the seventies in the Eixample and Sarrià-Sant Gervasi (interviews 9 and 15), the contemporary art gallery owners exhibiting local and consolidated international artists and which since the eighties have mainly been located in the Eixample – Consell de Cent (interviews 3, 10, 12 and 14), or the dealers that opened galleries in the nineties in Bohemian neighborhoods like El Raval, Born and Gràcia (interviews 2, 4, 6, 8, 9 and 13) and who expose young local artists, what we could call emergent art.

Table 1 – List of interviewees by neighborhood, degree of importance, creation and style of art displayed (2003)

Number	District	Degree of importance	Creation	Style
1	Eixample (Consell de Cent)	9	1973	Modern art
2	Gràcia	11	1995	Emergent art
3	Eixample (Consell de Cent)	10	1989	Contemporary art
4	Raval	7	1996	Emergent art
5	Eixample	3	1975	Traditional figuration
6	Born	14	1987	Emergent art
7	Gothic Quarter	8	1986	Traditional figuration
8	Raval	8	1995	Emergent art
9	Raval	9	1989	Emergent art
10	Eixample (Consell de Cent)	16	1986	Contemporary art
11	Gothic Quarter	11	1887	Traditional figuration
12	Eixample (Consell de Cent)	15	1991	Contemporary art
13	Born	4	1997	Emergent art
14	Sarrià-Sant Gervasi	6	1990	Contemporary art
15	Sarrià-Sant Gervasi	6	1947	Modern art

Source: Rius (2003)

This diversity of interviewees will enable us to analyze discourses regarding their gallery districts, evaluations of their centrality, the advantages and drawbacks of being located in one urban district or another, and the economic, professional ideological or artistic reasons leading to their choices.

The strategic choice of the central gallery district

All dealers interviewed agreed in saying that it was positive for art galleries to be located within a relatively short distance from each other, for example, one of the advantages was the inclusion of galleries in so-called gallery tours. However, the decision to open a gallery in a certain street not only depends on the willingness of the dealer, the limited availability of space is also a problem. Art dealers often have to wait for another gallery to close before they can open their own. A second issue is the price of rent. Ground floor spaces in the central areas of the art market are relatively expensive and only those with substantial initial capital or an established career can afford to pay to be in the downtown area; as a dealer notes: 'Most of the galleries would like to move to Consell de Cent but they can't because it is so expensive' (Interview 1 - Consell de Cent). The clustering of galleries around key streets, however, not only limits the availability of space to set up new galleries, but it also restricts the possibilities for dealers to access the top of their profession. In fact, it is one of the functions of art dealers to protect their trade by restricting the number of works of art available on the market.

However, contact with other galleries can also be positive. Low importance galleries benefit from the names of the other galleries and the symbolic value that has been attached to that particular street. Similarly, being on a street with prestigious galleries has many consequences in terms of sales:

> Yes, it was amazing. I mean, I understood why people pay such astronomical rent for a specific location. (...) Mercader Street (his old address) is only four city blocks away (in the Consell de Cent area) but is way out of this league. (Interview 12 - Consell de Cent).

Another dealer notes on the advantages of having an audience with a specific interest in art: ‘We have come here because there are many offices, people with higher education that have an affinity for art’ (Interview 14 - Sarria-Sant Gervasi). However, there are dealers who despite of the financial advantages, prefer to be based in other areas and, thus seek other alternatives to find resources and markets for their art and business projects.

The strategic choice of the peripheral gallery districts

Some gallery owners interviewed reject the hierarchy of Barcelona’s art market and support other forms of clustering. For example, a dealer in the area of Sarria-Sant Gervasi notes how ‘This street is a very suitable area in the geographical center of Barcelona (...) we are equidistant to all parts of the city’ (Interview 15 - Sarria-Sant Gervasi). The aim for this dealer is to locate his business in geographically accessible locations to attract buyers.

Dealers who have settled in the emerging old working-class, urban renewal areas operate in more difficult environments. They reject economic explanations for their choice of area, and argue instead that it is a matter of principle where they choose to run their businesses. As one dealer points out:

> It wasn't a business decision. It's a neighborhood where I have lived for four years. I did not seek anything else. Although, sometimes, I think that it would be better in economic terms to be on Consell de Cent. But I don’t really want to go. It's that simple. Maybe I'm not a great example... (Interview 13 - Born).

Another art dealer in the area of Raval says that his presence in the neighborhood (a difficult environment with a history of social marginalization) is a matter of principle:

> Contemporary art galleries should be where the contemporary art museum is (...) what happens at the MACBA is completely connected to what happens in contemporary art in Barcelona and Catalonia. I have no desire to go to Consell de Cent. I don't identify with it. (...) Consell de Cent Street is now an antique market. Modern, but antiquarian. There are no contemporary projects (Interview 8 - Raval).

This argument presents the Raval as the centre for emerging contemporary art as opposed to Consell de Cent, which is seen as being outmoded. However, there is another rationale for this argument: the proximity to MACBA is an advantage for a gallery business. It lends legitimacy to showcase aesthetically risky contemporary art, at the same time that it attracts a wider museum public, and thus potential customers.

This does not mean that these galleries forget where "they", the buyers and collectors, live and the challenge of getting them in the door. As a dealer suggests:

> I think the Catalan bourgeoisie is very conservative, not only aesthetically but also at a social level. So it's very difficult to get the upper class women who go to Consell de Cent to come down to the Raval. They tell you: - This square is filthy. Why don't you go to Consell de Cent? Can't you see that this neighborhood will never improve? (Interview 9 - Raval).

Aesthetic considerations are therefore interlinked with the defense and support of new cultural neighborhoods, like the Raval, and of emerging contemporary art, apart from seeking a detachment from high-class tastes and its social spaces.

This ideological discourse could also be interpreted as a form of interest in disinterestedness, to use a phrase coined by Bourdieu (1995), i.e. as a strategic choice of positioning oneself at the most autonomous pole of the artistic field and gaining symbolic capital with respect to others, hoping to accumulate enough to win positions in the world of the dealer profession. However, our analysis shows how this is a very risky choice and in the case of many emerging districts, this should be done collectively with other dealers in order to avoid becoming what Becker (1982) terms outsiders in the art world.

We have seen that the art dealers in upper class neighborhoods want to facilitate access to wealthy collectors. By contrast, gallery owners in emerging areas oppose this logic of convenience with a logic of effort and discovery: ‘the buyer who comes here is more determined. They have a greater desire to follow art’ (Interview 2 - Gracia). They note how a visit to the galleries by art enthusiasts can be also a discovery of an exciting new urban environment:

> People are used to going to Consell de Cent, and when they go there, they can buy glasses or lipstick or a dress. And here you cannot do that. (...) But you can do more inspiring things. You can enter Santa Maria del Mar, which without a doubt is the most beautiful church in Barcelona. You can walk along wonderful streets and discover lovely antique shops (Interview 6 - Born).

Dealers who are not in the central gallery zone and do not want to be in the upper-class residential areas may find a favorable ecosystem and alternative ways of managing the gallery. One of the possible resources to bear in mind is that of moving to where there are plenty of artists. It is also known that artists tend to concentrate in certain neighborhoods, such as the Open Studios of Barcelona in Ciutat Vella, which shows the work of a hundred artists in the original locations where these were created. In fact, art dealers have problems finding candidates to exhibit in their galleries. A dealer from Consell de Cent describes this situation in a rather exaggerated manner:

> If you go into a bar in the Born and ask if anyone is an artist, five guys will answer... I'm joking but I mean there are many artists and it's easy to find them (Interview 3 / Consell de Cent).

However, according to the Born dealer above, when you live and work in the same neighborhood as the artists, there is more complicity between dealer and artists:

> We believe in the relationship between artist and art dealer. We started at the same time and have followed the same career. We support one another, there's generational solidarity (...) Let's say we're a team that works well together (Interview 13 / Born).

Another possibility is to seek another kind of client than those who live uptown or tend to go to Consell de Cent. For example, the Born art dealers are seeking to attract professionals who have recently moved to the neighborhood:

> Our customers are local people, young people who have recently moved here. Also, in this neighborhood, there is a unique social fabric. And everybody knows everybody. I think thirty percent of our mailing is in postal code 003 (Born area). And they come to the gallery and will occasionally buy (...) Most are independent entrepreneurs who work as Internet designers, lawyers, consultants (Interview 13 - Born).

In Barcelona, as in other big cities, a new middle class linked to the creative industries has appeared (Florida 2002), and this new social class contributes to the consolidation of artistic neighborhoods and reassessment of old economically depressed and socially marginalized areas (Chalvon - Demersay 1984, Lloyd 2006). This is a market that young art dealers want to attract in order to develop their business. However, as the following comment indicates, in Barcelona there are few such potential customers:

> The only problem was that we thought we would sell something to this audience but we have not been able to do so. (...) The public is thirty or forty years old. They follow culture quite a bit, go to the theatre, go to art exhibitions and like them a lot.

> But they do not feel the need to have a work of art hanging on the wall at home. So, they hang a poster or a friend's work because everyone has artist friends in this environment (Interview 2 - Gracia).

Of course another strategy is to locate one's gallery close to tourist routes, and thus attract these potential buyers. This phenomenon is visible in the Born and the Barri Gotic:

> Many tourists come to visit the Picasso museum and the church of Santa Maria del Mar. They come to go for a walk. Design and home furnishing shops have opened around here. And the tourists buy art. Above all Americans, as they find it all very cheap (Interview 12 - Born).

But this is not a strategy that can help the gallery to consolidate itself in the long term because although it may provide financial resources in the short term, it does not create regular collectors for the gallery.

In summary, when a dealer creates a gallery and chooses a site, there are multiple considerations. The urban space is analyzed as a field of possibilities. The choice of area not only influences revenue but also costs. The difference between one area and another is of major importance: to rent a space in Gracia can cost a thousand euros per month while one in Consell de Cent may cost more than €3,000 or €4,000.

When asked why they opened their gallery in Gracia, a dealer explains:

> There are several points here. One is economic. But let's start with ideology. When we started up, there were two or three options. One was the Born. But we had already seen that the Born didn't work. There were fifteen galleries but some had closed. We expected it to decline further. The area around the MACBA (Raval) was on the rise, but the atmosphere there still needed to be formed. Here in Gracia, people are already attracted to the cinemas and independent theatre. Many cultured people live here (Interview 2 - Gracia).

But this gallery owner who cannot or does not want to locate in the gallery centre, Consell de Cent, also takes into account economic considerations, business management and the art project:

> The market we have here in Gracia is suitable for our artistic project. The fact that you are in Consell de Cent means you have a good chance of selling. But it also means many more expenses. We can display what we like. Because if you exhibited an artist you like but at low prices, even if you sold the exhibition three times over, if you had many expenses, you would continue to lose money. So we decided to come here where the rent is cheaper and people are interested in culture (Interview 2 - Gracia).

Conclusions

As we have seen, the special distribution of art galleries presents high rates of spatial concentration. And this concentration is even more acute if, as we have done in this article, we take into account the importance of art galleries: the most important ones are more concentrated. We could therefore describe dominant districts of galleries and peripheral districts of galleries. The interpretation of the reasons for this concentration is usually based on the commercial advantage that art galleries gain from such concentration. The dealers we interviewed confirm this appreciation but also introduce a new element: concentration helps them to limit the number of galleries in the centre, and the lack of space and the high cost of rent help them to limit the offer, establish a barrier to access by other galleries of a less professionalized level and, ultimately, create a seal of prestige for the area. Collectors prefer to go to the galleries in Consell de Cent (the dominant district of galleries) through the ease of finding the offer so concentrated and for the reputable quality associated to the zone. Consequently, gallery clustering can be interpreted as a collective strategy by the major gallerists in order to keep their leading position within the art gallery system.

The reverse of this situation is how there are many art galleries dispersed around the city that do not enjoy this economic and prestigious condition. And there are still new merchants that are seeking to establish new art galleries in Barcelona. At the beginning of their professional career, art dealers make a vital decision for the future of their project: where to be located. In this crucial first step, the new dealer faces several dilemmas. To choose a location also means choosing a position in the hierarchy and in the different segments of the art market. Consequently, as seen before, some art dealers with a low or medium importance level, unable to gain access – due to space and financial constrictions - to Consell de Cent Street join forces with other dealers in order to create new clusters in urban regeneration areas. Their bet to enter the art market combines two intentions: one is to avoid staying in both the urban and art market outskirts (as seen above, both are related); the other is to make a medium-term strategic bet in order to become a new gallery district.

Choosing to locate in an alternative to the dominant cluster area of the art market is not only a question of economic considerations but also responds to a career choice by the art dealer. Their decision will be strategic in the sense attributed by Crozier and Friedberg (1981) as a means to achieve a more advantageous position in the medium term within a profession (as art dealers) in a market (the art market) as well as in its urban expression (the gallery districts). Therefore, the building up of these art gallery clusters is the consequence of individual decisions. This process does not have a fixed and immutable structure but changes each time a gallery opens or closes or each time a gallery district moves from one area to another. At the same time, gallery districts are the product of non-organized collective actions, embodied as the building up of new gallery districts, such as the case of Chelsea in New York and the Raval in Barcelona.

The testimony of our respondents suggests that there are several areas that respond to different professional profiles and different strategies. To be placed in an emerging area can lead to bankruptcy and there is a high mortality rate for new galleries in the early years. However, it can also be a good long term strategy for defining an independent project and accumulating professional prestige in the art world. But this career choice should be accompanied by concerted action with other art galleries to consolidate the emerging area as a new cluster of the local art market and connect a new audience and new collectors. But it is always a risky strategy because some emerging art areas may become the center for the art market, in the future, like Chelsea in New York, or could remain marginal, like Raval in Barcelona.

Notes

[1] The concept of leapfrogging came up in the context of the theories of economic growth as well as in studies on innovation in industrial organization, specifically those focused on competition among companies. It is based on Joseph Schumpeter's idea of 'winds of creative destruction' (Schumpeter, 1974). This hypothesis suggests that monopolistic companies generate less incentive to innovation than their potential competitors. That is the reason why they eventually lose their role as technological leaders when new companies, willing to take risks, adopt fresh technological innovations. When these radical innovations become a new technological paradigm, the new companies 'leapfrog', turning into the new leaders. Leapfrogging means, when applied to gallery districts, 'a shift *en masse* to an underdeveloped location' (Halle, forthcoming: 5); this concept suggests that the move is initiated by the innovative gallery sectors trying to become leaders and is followed in a second wave by the well-established dealers.

[2] Barcelona is officially divided into ten urban districts, but only four are relevant to the art market: 1- Ciutat Vella, the historical city centre, which contains the city's main political and cultural institutions but which since the mid 20th century contains many pockets of poverty and is currently the district with the highest immigration rate. It is divided into three districts:

Casc Antic, Gothic Quarter and El Raval, which since 1995 have concentrated dozens of cultural institutions and companies. 2-Eixample was created in the late 19th century; it is the city's largest district and it is also home to renowned modernist buildings. It used to be the bourgeoisie's residential and commercial district until the mid 20th century. 3-Sarrià-Sant Gervasi is the district with the highest income per capita of Barcelona and the centre for luxury business and commerce. 4-Gràcia, formerly an independent town, is a popular old district with a busy theatre scene and a centre for Barcelona's alternative culture.

[3] In 1995, while Barcelona concentrated 21.5% of galleries, Madrid was in first place with 24.5% (Laporte 1995). Until then we could describe the art market as having two poles, which was a very different structure to France during the same period (1990) where 57% of the art galleries were concentrated in Paris (Moulin, 1992).

[4] Especially the Museo Nacional Centro de Arte Reina Sofía (MNCARS) which concentrates a large number of the collections by Spanish artists and whose budget of 50 million euros is in terms of both activity and visitors well above the Barcelona Contemporary Art Museum, with a budget of just 11 million euros.

[5] Most of the art galleries in Barcelona are dedicated to the primary market and only a minority is dedicated to the secondary market as their main or complementary activity. In this research we have not made any distinction between these two types of art gallery. Later research would be required to discern whether there are different patterns in the locations of these two segments of the market and in which gallery districts they are concentrated.

[6] The dimensions retained to construct the hierarchy follow those set by Moulin, Passeron, Pasquier & Porto-Vazques (1985) and Moulin (1992): level of professionalism (integration and participation in professional associations), level of artistic recognition (number of reviews of the exhibitions), media and social visibility (presence in the exhibition calendars in newspapers and art magazines) and internationalization and economic capacity (the gallery's participation in national and international art fairs). More specifically, and in order to produce a ranking of importance we have used the following indicators: membership of art dealer associations and participation in selected boards (Art Barcelona, Gremi de Galeries d'Art de Catalunya), number of exhibition reviews in national newspapers (Avui, El Pais and La Vanguardia) and arts magazines (El Periodico de las Artes, Arte y parte and Lapiz), listing in exhibition calendars in art magazines (The Art Newspaper, Arts and part and Pencil) and annual directories of art (Expoarte and Expoguía), participation at Spanish art fairs (Expoarte and ARCO) and international art fairs (Art Frankfurt, Art Basel, FIAC Art Forum Berlin, Art Chicago and Arteba).

[7] The average profile of low importance galleries would be that of a gallery that is not a member of art associations, or only a member of the Art Galleries Guild, its exhibitions are not reviewed in the national and specialist press, and it only participates at Barcelona art fairs. The average profile of medium importance art galleries is that of a gallery that belongs to at least one professional association, whose exhibitions are occasionally reviewed in Catalan or national press, that features in all art guides and art and that takes part in Barcelona, Madrid or and international art fairs. The average profile of high importance art galleries is that of a gallery that belongs to and also manages all professional associations (including Art Barcelona, a selective association of galleries), and whose exhibitions regularly appear in reviews, which appears in all art lists and calendars and which takes part in different international art fairs, is selective about participation and enjoys renowned prestige (e.g. ARCO, Artbasel, etc.).

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