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Somewhere in the world: Aboriginal and Torres Strait Islander art and its place in the global art market

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Australian Government
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Shortened forms

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|-----|---------------------------------|
| AAB | Aboriginal Arts Board |
| AAC | Aboriginal Arts and Crafts |
| ABS | Australian Bureau of Statistics |
| GFC | global financial crisis |

Executive summary

Aboriginal and Torres Strait Islander art is a distinctive feature of Australia's cultural and creative landscape and a sizeable component of Australian identity. While the political dimensions of Aboriginal and Torres Strait Islander art remain much contested, the aesthetic and economic aspects are better established. Reflecting the prominent place of Aboriginal and Torres Strait Islander art in Australian society, there have been – for over 40 years – numerous attempts to place Aboriginal and Torres Strait Islander art into the global art market, as both a cultural experience and a commercial opportunity. This paper surveys the uneven history of these attempts and the often contradictory motivations at work. These attempts are given some context through statistical information, and the paper concludes with a summary of the current challenges and opportunities.

Introduction

Two entangled stories characterise much of what is discussed and promoted about Aboriginal and Torres Strait Islander art: economics and creativity (Altman 2005, Myers 2002). The economic story is a (relatively) straightforward one: that many Aboriginal and Torres Strait Islander people are excluded (for a complex set of historical, geographic, social and political reasons) from economic opportunity, whether as employees or entrepreneurs. The sale of art is a means to reclaim some of this economic shortfall. The creative story is both more encompassing and more intangible: that Aboriginal and Torres Strait Islander art is, variously, Australia's 'greatest cultural gift to the world' (Vanstone cited in Price 2005) and 'the last great art movement of the 20th century' (Hughes cited in Henly 2005). Extravagant claims aside, Aboriginal and Torres Strait Islander art claims both a prominent part of Australian cultural identity and an enduring role in the social, cultural and economic life of remote communities, built, as it is, on one of 'the longest running traditions of art in the world, dating back at least fifty millennia' (Caruana 2003, p. 7). It is these elements that drive the promotion and sale of Aboriginal and Torres Strait Islander art into international markets: the presentation of Australia's unique contribution to the visual arts while generating income for disadvantaged artists.

This paper aims to examine the history of attempts to build international audiences for Aboriginal and Torres Strait Islander art and to achieve some of the same recognition globally that has been secured domestically. While this paper is surveying one particular dimension of Aboriginal and Torres Strait Islander art, this sits within a complex and contested field of inquiry in Australia, reflecting the complicated and often difficult history between the original inhabitants and settlers in Australia. The scale of these debates is extensive, ranging from the historical and post-colonial through to issues of identity and sovereignty. Of necessity, this paper's focus is more specific, though many of the same tensions exist in the visual arts domain. The trigger for these tensions is the very different world views of the artists and their audiences – the different value systems at work (Smith 2008). These value systems are then overlaid with further ambitions, with the art seen as a 'redemptive political and civic project that has sought to affirm Indigenous presences and stimulate new versions of nationhood, heritage and intercultural fellowship' (Fisher 2014, p. 240). The presentation and sale of Aboriginal and Torres Strait Islander art to global audiences carries with it these layers, explaining some of the history and tactics that have unfolded over the last 40 years.

Aboriginal and Torres Strait Islander art is very much an 'art world' as proposed by Becker (1982). Interdependent networks of people contribute to the production, distribution, sale and promotion of art from Australia's first peoples. However, after four decades, this art world has become finely honed, operating more as Rodner and Thomson suggest in their description of an 'art machine' (2013). This machine has interlocking cogs, made up of artists, curators, critics, funders, galleries and consumers, whose combined efforts are focused on maximising the value (financial and cultural) of an artist's work. It is these same cogs that have enabled Aboriginal and Torres Strait Islander art to be exhibited and sold internationally. This paper reviews, with two aims, the way different agents and instrumentalities have designed and delivered overseas opportunities. The first aim is to summarise this history, plotting the activities, successes and barriers that have shaped four decades of endeavour and, through this appraisal, to address the second aim of contributing to clarity and purpose for future efforts. This second aim is given some urgency by the steep falls in the art market, its enduring impact on the income for Aboriginal and Torres Strait Islander artists and attempts to rebuild existing or find new markets (Woodhead and Acker 2014).

This paper takes a case study approach, by firstly setting out the broad historical trajectory of the emergence of Aboriginal and Torres Strait Islander art onto the national and then international art market. This is followed by a summary of the limited statistics, in order to see what baseline evidence there is for the claims made about the prominence and potential of international sales, which are themselves then set out. The paper concludes with an examination of the circumstances facing current and future international ventures for Aboriginal and Torres Strait Islander art. There has been little analysis done in this area; consequently, there is little direct source material available. This has necessitated drawing on a variety of sources, ranging from art industry journals and government reports through to interviews with four commercial art agents, one located in Australia and three internationally (Singapore, Germany and France). While small amounts of generalised information are collected by the Australian Bureau of Statistics, the places where actual art transactions happen do not collate or readily share information; few art-producing centres log the necessary details; commercial agents keep sales information confidential; and auction sales are often to anonymous or third party buyers. Further, there is no way to track the volume and value of artworks that are sold privately.

Background

Until at least the 1970s, the art of Aboriginal and Torres Strait Islander people was largely of ethnographic interest, traded on Australia's frontiers, consigned to museums and defined by discussions of the 'primitive arts' (McLean 2011, Morphy 2005, Myers 2002). While there was some small-scale support for remote Aboriginal and Torres Strait Islander artists by local missionaries (e.g. at Aurukun in Queensland and Ernabella in South Australia), it was the wider social changes of the 1970s that triggered the beginnings of a commercial art market (Altman 2005). Central to this was the new, leftist Whitlam Government's establishment of the Australia Council for the Arts and, within it, the Aboriginal Arts Board (AAB) in 1973.

One of the AAB's functions was the promotion of Aboriginal and Torres Strait Islander arts, with 'the view that their role was to stimulate audiences in the broadest of contexts, engaging the international community as well as the wider Australian population' (Berrell 2009, p. 14). The AAB was instrumental in developing audiences – particularly international audiences – for Aboriginal and Torres Strait Islander art; this is discussed in more detail below. The AAB extended earlier work of Aboriginal Arts and Crafts (AAC) Pty Ltd; this federal government agency was established in 1971 in response to two earlier reports promoting the opportunities for Aboriginal and Torres Strait Islander art in the tourist market. AAC established a network of retail galleries in Australia's main cities, with the aim of contributing to the 'economic development of geographically remote Aboriginal communities ... and generat[ing] an income for Indigenous artists and craftsmen' (Berrell 2009, p. 14).

The overlapping work of AAB and AAC coincided with the 1972 opening of Australia's first artists' cooperative, Papunya Tula Artists, in the Western Desert region (Bardon and Bardon 2004, Myers 2002). The artists' cooperative established by Papunya Tula led the way for nascent remote art enterprises in places such as Mornington Island and Arnhem Land, as well as other desert communities. 'The professionalization of mediation between artists and the market was underway' (Altman 2005, p. 6), with the creative and cultural diversity of Aboriginal and Torres Strait Islander artists and their newly emerging art centres supplying artworks to meet the demand triggered by a growing array of government agencies, retailers, collectors and audiences.

In the four decades since those first desert paintings were made and sold, the commercial terrain for Aboriginal and Torres Strait Islander art has grown into a complex, multi-layered phenomenon that is now

a truly national undertaking, with artists and art businesses operating in every state, with a majority in many of Australia's most remote places. It is also an enduring success – one of the few good news stories from remote Aboriginal and Torres Strait Islander Australia (Acker et al. 2013, Altman 2005). Reflecting the sector's complexity, the scale of production, promotion and sale of art from remote Australia is also increasingly difficult to assess, with a fluid mix of online transactions, direct sales, discounting, cash sales and bartering undertaken by a diverse array of individuals and businesses, often operating in remote locations or with minimal resources (Commonwealth of Australia 2007). There are, however, some broad definitions that help in understanding the production and distribution channels. Artists – whether working independently or through a community enterprise – produce a wide range of works (paintings on canvas dominate); the first, or primary sale, is customarily through an agent (art centre, gallery or dealer, operating on a commission basis). All subsequent sales are secondary sales; auction houses are the most prominent feature in the secondary market, taking works on consignment and promoting them to national (and sometimes global) art buyers. While artworks move freely between private sellers and buyers, it is the auction market that attracts high level interest and where important benchmarks are set for an artist's price and collectability (Coate 2009, Taylor and Coleman 2011, Wilson-Anastasios 2011). However, fine art markets are distinct hierarchies, and the high profile secondary market for Aboriginal and Torres Strait Islander artworks is concentrated in 'a small number of artists at the top of the market ... [demand is] exaggerated relative to the market in general' (Wilson-Anastasios 2011, p. 25). There are also important but unpredictable links between the primary and secondary markets, as 'collectors are less likely to spend significant amounts of money on artists' work (in the primary market) if he or she does not have an established auction market' (Wilson-Anastasios 2011, p. 25). Additional factors that contribute to an artists' market aura are the number and profile of the collections – whether public or private – that have acquired works, the number and status of the exhibitions the artist has participated in and whether the artist is deceased.

A feature of the Aboriginal and Torres Strait Islander art sector in Australia is that people working in the 'business of art' have been almost entirely non-Aboriginal or Torres Strait Islander (Belk and Groves 1999). In 2014, Woodhead and Acker estimated that less than 10% of people operating Aboriginal and Torres Strait Islander art businesses are Aboriginal and Torres Strait Islander people (Woodhead and Acker 2014). As prominent Aboriginal artist Richard Bell states: 'Aboriginal art – it's a white thing!' (Bell 2002). This situation overlays any examination of the business of Aboriginal and Torres Strait Islander art; while the artists do benefit – eventually – from the sales triggered by collectors and buyers, and there are a wide range of social and personal benefits for artists (Commonwealth of Australia 2007, Cooper et al. 2012) their agency in a majority of art market transactions is minimal. This reality does not devalue the achievements of the Aboriginal and Torres Strait Islander artists and the wider art market; it does, however, reflect the highly stratified nature of the sector.

While Aboriginal and Torres Strait Islander art is now a recognised part of the art market, there remain key areas of contention. One of these areas is the role and purpose of government involvement in the sector, particularly in recent years when new – and, to many, over-engineered (Rothwell 2013, Wilson 2011) – legislation coincided with the global financial crisis (GFC) to see a sustained fall in the art market (Commonwealth of Australia 2012). There remain numerous supporters of the government's role in the sector, including those advocating for support for accessing international markets (Newstead 2010; G Pilla, ReDot Gallery, 2014 pers. comm. November). The intervention of various government agencies into Aboriginal and Torres Strait Islander art happens through a mixture of support (e.g. direct funding), subsidy (e.g. sponsored trade missions) and regulation (Code of Conduct, Resale Royalty). These interventions are often pitched as improving the economic position of artists, aspirations which themselves

are sited within the broader context of ‘closing the gap’ (Commonwealth of Australia 2013) in wellbeing between Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander people in Australia.

The long-term, wide-ranging support from government (and, in a few cases, non-government) arts and cultural agencies has contributed to significant growth in the Aboriginal and Torres Strait Islander art sector; there are now around 90 art centres in all states and territories, a well-established network of commercial galleries and dealers, significant public and private collections (both in Australia and overseas) and an educated audience. This commercial architecture is built on the sustained creative excellence and cultural diversity found in remote Australia. The transfer of Aboriginal and Torres Strait Islander identity and expression onto the mediums of the contemporary art world has resonated for both artists and audiences, creating an artistic and commercial exchange of lasting benefit.

The interplay of these two elements – commerce and creativity – continues to frame the development of the Aboriginal and Torres Strait Islander art industry, with its well-established supply chain of artists, agents and audiences. It is against this complex and unstable backdrop that the role of Aboriginal and Torres Strait Islander art in the global art market has played out.

Aboriginal and Torres Strait Islander art: international context

Table 1: Exports of cultural goods

| | Total cultural goods ... (\$M) | ... of which, artistic works (\$M) |
|---------|--------------------------------|------------------------------------|
| 1995/96 | 333 | 70 |
| 1996/97 | 296 | 45 |
| 1997/98 | 330 | 50 |
| 1998/99 | 384 | 66 |
| 1999/00 | 385 | 64 |
| 2000/01 | 483 | 99 |
| 2001/02 | 544 | 95 |
| 2002/03 | 576 | 100 |
| 2003/04 | 611 | 103 |
| 2004/05 | 633 | 79 |
| 2005/06 | 596 | 117 |
| 2006/07 | 603 | 90 |
| 2007/08 | 628 | 133 |
| 2008/09 | 584 | 95 |
| 2009/10 | 540 | 82 |

Note: the category ‘artistic works’ includes photographic and cinematographic media and artistic works. Source: ABS 2014

This paper intended to provide a reasonable statistical base for assessing the scale of international art market activities. However, any detailed analysis is limited by the virtual absence of data, a long-term situation noted by the 2007 Senate Inquiry into the sector (Commonwealth of Australia 2007).

Despite the lack of detailed statistics, various government agencies and councils (ABS 1997, 2007, 2011; Cultural Minister’s Council 2003) track some broad measures of Australia’s trade in culture, which provide some context. Table 1 shows total exports of ‘cultural goods’ and, within that, the exports of the category that includes visual art.

Of Australia’s total exports, cultural goods average around 0.3%. Further, Australia has imported more artistic works than exported them in 14 of 15 years to 2010; on average, artistic imports have been 1.6 times higher than exports. While the destination countries for Australia’s exports of artistic works are diverse, the United States, United Kingdom and New Zealand dominate, totalling between 50% and 70% annually.

This summary information can be given some further context: the total global art market in 2011 was estimated to be worth around AUD\$62 billion, split equally between auction sales and gallery sales (McAndrew 2012). The Australia Council for the Arts artifacts website (see: <http://artfacts.australiacouncil.gov.au/visual-arts/global-10/>) estimates that Australian auction sales were 0.6% of global total auction sales (approximately \$186 million). However, the Australian Art Sales Digest (Furphy 2014) compiles detailed auction statistics (Figure 1), which show both a lower estimate of sales and the relatively small proportion of the national art market for Aboriginal and Torres Strait Islander artists. For the decade to 2013, Aboriginal and Torres Strait Islander artists have averaged 13%, or \$13.8 million of total annual auction sales.

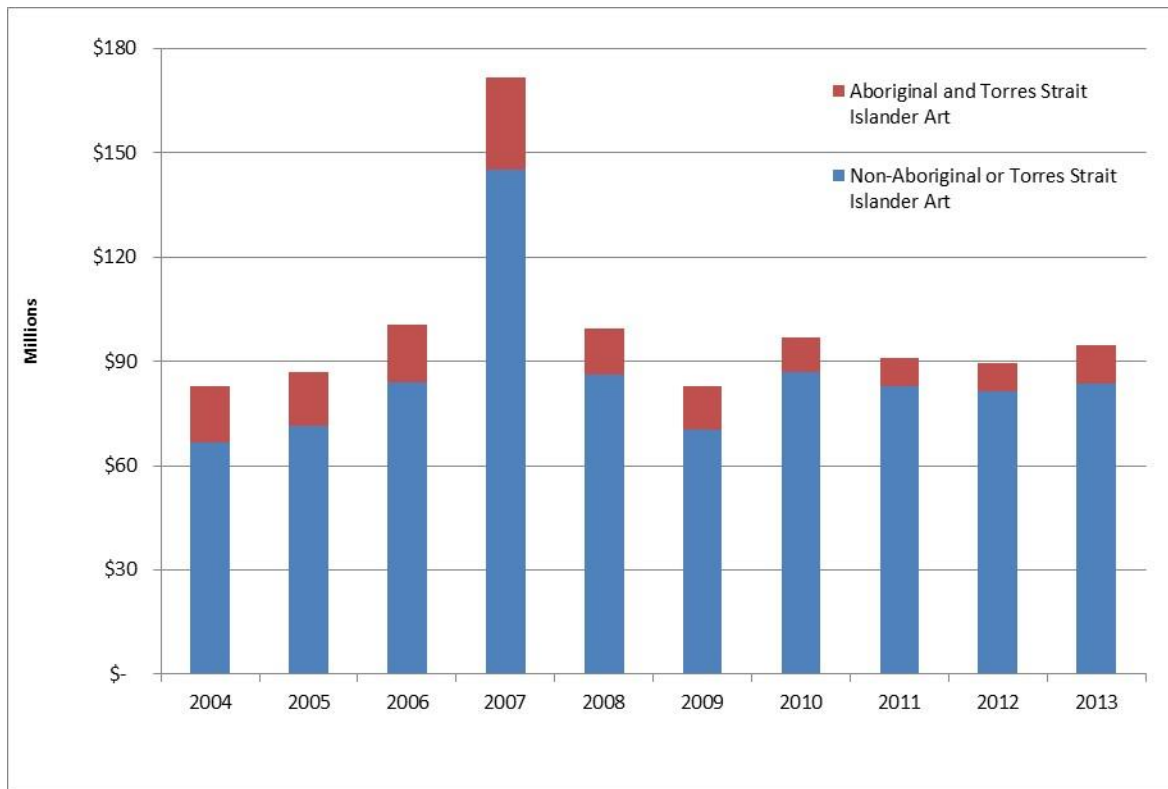


Figure 1: Australian auction sales, showing the proportion of Aboriginal and Torres Strait Islander art compared to non-Aboriginal or Torres Strait Islander art for the 10 years to 2013

Source: Furphy 2014

The success of large auction houses, particularly Sotheby's (who, importantly, toured with auction lots to key cities, giving collectors and buyers direct access to the works) has been notable in promoting and selling Aboriginal and Torres Strait Islander art in the global market. Between 1997 and 2007, 'over \$50 million worth of Aboriginal art (was) sold, between 50 and 70% by volume has gone to buyers outside Australia, with that figure split roughly down the middle between the US and Canada and Europe' (Klingender [Sotheby's] quoted in Genocchio 2008, p. 10). Using that (admittedly rough) estimate of the percentage of art going overseas, an average of \$8.3 million, or 60% of all auction sales of Aboriginal and Torres Strait Islander art were exported per year. This, in a market for Aboriginal and Torres Strait Islander art estimated to be worth between \$150 and \$250 million annually (Commonwealth of Australia 2007, p. 10), equates to between 3.3% and 5.5% of art heading offshore. While it is impossible to present precise figures, it is clear that by whatever estimate is used, or from whatever part of the supply chain an estimate is made, the financial scale of Aboriginal and Torres Strait Islander art in international markets is tiny.

A recent survey undertaken by the Cooperative Research Centre for Remote Economic Participation Art Economies project (Woodhead and Acker 2014) of 126 Australian and international art businesses provides detailed information about the past and potential markets for Aboriginal and Torres Strait Islander art, including differences between Australian-based and international art businesses. From this survey, Australian-based art businesses report that in the last five years, Europe has been the source of 65% of sales, with France, Germany and the UK accounting for about three-quarters of these sales. The USA represented a further 23% of art sales; Asian markets were 9%. Over the same period, 49% of sales for overseas-based art businesses were in Europe, 29% to the USA and 11% back to Australian customers.

The art businesses surveyed also provided predictions on future market opportunities; overall, the sales profile for both Australian and international art businesses indicated only minimal change is expected. Australian-based art businesses predicted a small decline in European markets to 58% of total international sales, a small increase in the US market to 26% and modest growth in Asia to 13%. International art businesses saw increased opportunity in Europe (up to 57% of total sales), a static market in the US and only minor changes to other markets. In short, for both Australian-based and international art businesses, European and US sales dominate, both over the last five years and for anticipated sales over the next five years. For Australian-based art businesses, the US/European markets represent 88% of total international sales for the last five years and 84% of predicted international sales over the coming five years; for international art businesses, the corresponding proportion of total sales to Europe/US is 78% (past years) and 81% (predicted).

This stability in the market is perhaps best illustrated through the experience of a leading Australian gallery, who held a commercial exhibition in Tokyo in parallel with a very high profile non-commercial exhibition of one of the few Aboriginal artists of international stature, Emily Kngwarreye, where:

[M]ore than 100,000 visitors attended the exhibition during its three months in Japan. To coincide with the exhibition my own Coo-ee Gallery, with assistance from the Department of Foreign Affairs and Austrade, curated and staged the commercial exhibition ‘Emily Kngwarreye and her Legacy’. The selling exhibition sought to capitalise on the interest generated by a museum event that was promoted widely by its sponsors through newspaper articles and advertising in the media, on street hoardings and on public transport. It comprised 60 individual works worth \$AUD2 million but generated just \$350,000 in sales. Despite all of the publicity, not one single artwork sold to a Japanese client. The buyers were US hedge fund managers, European bankers and the CEO of an international recruitment agency. Quite clearly the international interest in purchasing Aboriginal art is not in Asia! (Newstead 2010, p. 16)

Going global – looking back

There have long been claims made as to the importance of cultivating and sustaining international market interest in the art (and culture) of Australia’s Aboriginal and Torres Strait Islander people. ‘The fortunes of Aboriginal art have always been tied to international collector interest’ (Newstead 2012, p. 32) is characteristic of claims from the commercial sector; such sentiment has fuelled the inbound and outbound trade missions supported by Austrade and the Northern Territory Government that have ‘two-fold benefits – the initial economic gain for artists and helping to open up markets for Aboriginal arts in the United States’ (Commonwealth of Australia 2008, p. 26).

History provides some insight into the relationship between the promotion and sales of Aboriginal and Torres Strait Islander art and global markets. As discussed earlier, AAB was the first agency to negotiate the (at times contradictory) aesthetic and commercial forces of Aboriginal and Torres Strait Islander art. The AAB was aware of the increasing level of production in remote art communities, the artists' aspirations for 'informing and educating the wider population about the unique artistic and cultural values' as well as the 'meagre cash flow generated' (Berrell 2009, p. 19).

The AAB responded with an ambitious international exhibition program. As Chicka Dixon, AAB Board member, said in 1974: 'Australian people were generally ignorant and there were some advantages in gaining international acceptance to demonstrate Aboriginal art was world class (Dixon cited in Berrell 2009, p. 19). The first major exhibition toured 13 venues in Canada between 1974 and 1976, at the end of which the AAB Board 'donated many of the works to those venues ... they believed it would adversely affect the local market if the collection came back' (Edwards cited in Berrell 2009, p. 21). From 1974 to the early 1980s, the AAB brokered 19 exhibitions in 14 countries as diverse as the USA, Nigeria and Papua New Guinea (Berrell 2009). The exhibitions were large and well received, with high attendance and widespread media coverage, totalling over 10 million visitors between 1973 and 1979 – though 'this achievement was little reported in the Australian press' (Berrell 2009, p. 22). An important strategy by the AAB was the inclusion of educational and contextual information about the artists and their cultural universes. The overall strategy for the AAB was to lift the 'paintings from the storerooms and offices throughout Australia and display them in metropolitan galleries and museums overseas' (Berrell 2009, p. 24). This sustained program of promoting Aboriginal and Torres Strait Islander art and simultaneously educating audiences enabled both 'artist and receiver ... to achieve ... maximal meaning' (Smith 2008, p. 39); that is, the often alienating differences between artist and audience are replaced by some common ground. On a more literal analysis too, the AAB program successfully synchronised all of the 'cogs' of the 'art machine' (Rodner and Thomson 2013) to increase the value of the art and to generate wealth (of various forms) for the participants.

The AAB's overseas exhibition program finished in the early 1980s, with the new decade bringing a focus on economic imperatives (Myers 2002) and coinciding with critics who 'observed the program had limited commercial benefits' (Berrell 2009, p. 26). While official efforts largely moved to developing domestic markets and audiences, a small number of landmark exhibitions continued to be held. In 1988, 'Dreamings: the Art of Aboriginal Australia' opened in New York; in 1993, 'Aratjara: Art of the First Australians' showed in Germany, England and Denmark; in 1989, 'Magiciens de la Terre' opened at the Georges Pompidou Centre in Paris; in 1990, Aboriginal art was shown at the world's premiere art event, the Venice Biennale and, again recently, at dOCUMENTA13 in Germany. These events generated considerable interest (the 'Dreamings' exhibition set an attendance record in New York (Myers 2002) and, crucially, helped established the first generation of serious, international collectors (Newstead 2010, Wright 1998). Australian institutions to tour internationally were the Museum and Art Gallery of the Northern Territory, the Museum of Contemporary Art, the National Museum of Australia and the National Gallery of Australia (Newstead 2010).

Following the closure of the AAB, the great majority of international exhibitions of Aboriginal and Torres Strait Islander art were organised by leading commercial galleries and Australian and international collectors. The shift from the AAB to commercial galleries as the main international proponents of Aboriginal and Torres Strait Islander art saw a winding back of the integrated approach that targeted curators, critics, collectors, institutions and audiences. While more than 100 Australian Aboriginal and Torres Strait Islander visual arts exhibitions were staged around the world between 1988 and 1998, from Finland to Tahiti, from Cuba to China and from New Zealand to Denmark (Wright 1998) the long-term

results of these exhibitions appears very limited. A major event was the opening of the Musée du Quai Branly in 2006, a significant new museum in Paris, featuring Aboriginal and Torres Strait Islander art in the architecture of the building; in 2013, an extension to the gallery also extended this concept, foregrounding Aboriginal and Torres Strait Islander art for European audiences once again. Yet this event did not generate new markets or create collectors in France; while there was some short-term interest, the overall market and the actors within it remained largely unchanged (S Jacob, Arts d’Australie Gallery, France, 2014. pers. comm. November). The late 1990s through to the GFC saw sizeable growth in the Aboriginal and Torres Strait Islander art market, with high-end overseas interest and boom times in local markets (Genocchio 2008). Specialist dealers opened commercial galleries in the US and Europe, and leading works were sold at auction to international collectors (Van den Bosch 2005). However, since the art market fall in 2008, despite most other art markets recovering to some extent – including the non-Aboriginal or Torres Strait Islander art market in Australia – sales and art income for artists have continued to fall (Woodhead and Acker 2014). This shifting relationship between Aboriginal and Torres Strait Islander artists and the art market are the latest in an unbroken sequence of change since those first commercial forays in the 1970s. The next section examines the obstacles and opportunities for Aboriginal and Torres Strait Islander art and artists to engage with this reconfigured international art market.

Going global – looking forward

Despite Aboriginal and Torres Strait Islander art being part of the international art market for over 40 years, there remain a range of barriers, including structural, financial, aesthetic and regulatory hurdles. While these barriers exist along a (deeply entangled) spectrum, and not all of them apply to all situations, they do set out the diverse challenges that any art business faces when taking Aboriginal and Torres Strait Islander art to global audiences.

Ethnography vs. art

Aboriginal and Torres Strait Islander art has had a fluid place within the art market, having, over the years, been pushed between categories of ethnographic or tribal art and fine or contemporary art (Belk and Groves 1999, McLean 1998, Myers 2002). It is here that many of the complex questions of different value systems and the contest between them play out, magnified by the cross-cultural setting in which they take place (Hutter and Throsby 2008). Within the Aboriginal and Torres Strait Islander art sector itself, there remain unresolved debates about how the very wide spectrum of objects that are produced are understood, categorised and marketed: What is ‘fine art’? What is a ‘souvenir’? (Fisher 2014). While this debate is ongoing and often ideological, it has implications for the way the art is presented and how audiences view, understand and consume it – and also on the prices this art can attain. At its simplest, ‘ethnographic art is made by a “people”; contemporary art is made by a “person”’ (Wilson-Anastasios 2011, p. 23). This translates directly into how auction houses present Aboriginal and Torres Strait Islander art. While Sotheby’s allocates ‘contemporary Australian art to its “Paintings, Drawings and Sculpture” department, Aboriginal art is classified as one of the “Ancient and Ethnographic Arts” alongside Pre-Columbian Art and Egyptian Antiquities’ (Wilson-Anastasios 2011, p. 22).

This matters both for prices and for future viability of the Aboriginal and Torres Strait Islander art sector in Australia. It is the contemporary, fine art market that has open-ended pricing potential: ‘Once you break into the more general contemporary art market the sky is the limit on prices – contemporary art buyers are willing to pay a lot more for good work’ (Mora cited in Genocchio 2008, p. 177). This has seen many market participants present the works as being ‘beyond Aboriginality’ (Hodges cited in Myers 2002,

p. 223), with agents selling a painting, not Aboriginal culture. In contrast, there remain many proponents for Aboriginal and Torres Strait Islander art and culture, identity and politics being indivisible (Myers 2002).

Ethnographic interest is focused on notions of the ‘traditional’ and ‘authentic’, with the ‘greater the distance between an ethnographic relic and the developed world, the better’ (Wilson-Anastasios 2011, p. 23). This sees collectors focusing on works that meet these ethnographic criteria, buying high value works of deceased artists, with little interest in young and emerging artists; the result, potentially, is a ‘state of social and cultural stasis’ (Wilson-Anastasios 2011, p. 34) for new generations of Aboriginal and Torres Strait Islander art and artists.

A parallel situation further illustrates the competing values at work in this sector; while the art world is often fixated on the abilities and successes of individual artists, Aboriginal and Torres Strait Islander artists and art centres regularly market the collective, characterised by group exhibitions. This ‘collective/customary nature of art production cements the idea of the art as tribal/ethnographic. More needs to be done to highlight and promote individual talents. The main conduits are dealers rather than institutions, but the financial costs are exorbitant’ (J Raffan, curator and writer, *Artifacts*, 2014. pers. comm. November).

Financial and capacity limitations

The only examination of Aboriginal and Torres Strait Islander art in the international market was undertaken as part of a 2007 Senate Inquiry (Commonwealth of Australia 2007). The report and its many submissions promote the importance and potential of the international market, though the supporting evidence is more emotive than detailed. The report, however, also identifies key barriers. These barriers are also recognised by Austrade, which has supported a number of inbound and outbound trade missions, despite a lack of data and possible ‘inconsistencies in production, supply capacity and quality control’ (Commonwealth of Australia 2007, p. 194). Austrade notes that the remoteness of many Aboriginal and Torres Strait Islander artists and art businesses and their limited business knowledge restrict development of the long-term strategies required for succeeding in international art markets.

The financial burden of going international is often underestimated: ‘There is not enough profit being made overall to actually allow those businesses to go back to those art fairs regularly’ (Commonwealth of Australia 2007, p. 195). As one German gallery noted, ‘successful international business needs strong local partners in the target countries’ (R Kelch, Art Kelch, Germany, 2014. pers. comm. November); the small number of international galleries selling Aboriginal and Torres Strait Islander art is a sobering reminder of the limited reach of such collaborations. Even for major institutions, the financial hurdle of presenting international exhibitions can be too high: ‘There is just not the funds required to mount these major exhibitions overseas and to reach those very high art audiences that are really the taste makers for the consumers of art all around the world’ (Perkins cited in Commonwealth of Australia 2007, p. 201).

Provenance and politics

The Aboriginal and Torres Strait Islander art market is a polarised one, with a long history of tension and disagreement on issues ranging from regulation to trade practices and ongoing cross-cultural debates (Myers 2002, Rothwell 2010). Provenance is perhaps the most pointed of these issues. While there have been considerable efforts in Australia to create industry standards, such as establishing a Code of Conduct in part to give greater confidence to consumers, the unregulated art market undermines these efforts, as noted by a German gallerist: ‘Exhibitions in Europe – more often than not, supported by Australian

embassies – present mediocre artworks, of doubtful provenance. Sales are negligible and these exhibitions confuse people that are potentially interested in Aboriginal art’ (R Kelch 2014, pers. comm. *ibid*). These industry issues have, at times, spilled over into the international press, with detrimental effects, as UK-based dealer Rebecca Hossack states: ‘Each time articles like this appear in the national and international press it kills the market in London stone dead’ (cited in Newstead 2010).

While there are important interdependencies between commercial galleries and Aboriginal and Torres Strait Islander-owned remote community art centres, there are also ongoing tensions, exacerbated by post-GFC financial pressures and entangled issues of representation, authorship and supply and demand; in this environment, selecting, pricing, marketing and presenting artworks is a significant challenge. The debates triggered by these issues lead to audience confusion and caution, with potential buyers often assuming the worst (Booth 2014).

Aesthetic and curatorial

Aboriginal and Torres Strait Islander art occupies, at best, a minute niche in the international art market: ‘We hear our own feedback too loudly – we can be lulled into a false sense of growth. The number of people – in Europe/US – who can recognise Aboriginal art is minimal’ (G Pilla 2014, pers. comm. *ibid*). However, to fulfil at least some of the aspirations that industry participants have for Aboriginal and Torres Strait Islander art, the development of audiences and key ‘taste makers’, is crucial. To do so two parallel strategies are needed: artistic quality of the highest level, complemented by educational information; in combination, these build up the number and confidence of the collectors necessary for sustained international interest (Commonwealth of Australia 2007). The internet presents challenges to such activities because the unmediated online space, where some of the sector’s unresolved issues play out (e.g. particularly pricing and provenance of artworks), undermine efforts to educate audiences and present art of quality and integrity. The activities of the AAB, as outlined earlier, are a standout example of a coordinated and strategic promotional and educational approach.

Given the often competing views in the sector, the unanimity of views on the importance of a coherent international strategy for Aboriginal and Torres Strait Islander is notable, characterised by comments such as ‘the international market is absolutely critical for the sustainability of the art centre model and Aboriginal art in general; the collector base in Australia is stagnating and the secondary market is in trouble, through a combination of auction house behaviour and government regulation’ (J Raffan 2014, pers. comm. *ibid*). Unusually for the polarised Aboriginal and Torres Strait Islander art market, there appears to be wide agreement among art businesses that a key – and largely unfulfilled – role of government is to coherently support initiatives promoting and presenting Aboriginal and Torres Strait Islander art globally (Commonwealth of Australia 2007, Newstead 2012). It is suggested that any such initiatives synchronise commercial and non-commercial exhibitions in relevant markets, focus on quality and be supported by a well-planned body of educational material (Commonwealth of Australia 2007, p. 200) – a reprise and update of the AAB’s methodology. As highlighted elsewhere, the education of audiences about Aboriginal and Torres Strait Islander art is crucial – and cannot be left to chance: ‘The German market needs a lot of background information to understand the artworks’ (R Kelch 2014, pers. comm. *ibid*) and ‘it is much easier to market the ethno-mystical aspects of Aboriginal art as a drawcard than to try to break through barriers and reach out to new audiences’ (J Raffan 2014, pers. comm. *ibid*).

Cultural diplomacy or commercial drivers

A consistent thread throughout the global forays of Aboriginal and Torres Strait Islander art are the interchangeable concepts of art as cultural diplomacy and/or as a commercial opportunity in the global art market (Commonwealth of Australia 2007, Myers 2002, Newstead 2010). At each end of the spectrum they are easy to recognise: Aboriginal and Torres Strait Islander art (and culture) presented as emblematic of Australia and Australian identity (e.g. see the Department of Foreign Affairs and Trade's Cultural Diplomacy Program) is at one end, and commercial art exhibitions at privately owned galleries are at the other end. However, diplomacy and commerce are often blended (unhelpfully, given the distinctly different drivers at work) and complicated further by additional baggage such as 'tourism'.

As summarised above, non-selling exhibitions, which sit at the diplomacy end of the scale, can be important mechanisms in generating interest and cultivating audiences, but without 'an adequate density of events – exhibitions, cultural activities, political events – to sustain attention on Aboriginal art' (Myers 2002, p. 318) commercial ventures are difficult to sustain. The cultural diplomacy approach is emblematic of what Fisher calls Australia's 'redemptive project', driven by 'the ethical exigencies of the postcolonial settler state and the quest – among Indigenous people, sympathetic civil society and governments – for signifiers of a resilient Aboriginal presence' (2014, p. 332). However, given the prominence of market forces and their ability to drive decision-making in many areas (Hutter and Throsby 2008), it would seem impossible to separate cultural diplomacy from commercial interests.

Protection of moveable cultural heritage

The *Protection of Movable Cultural Heritage Act 1986* (PMCH Act) was established to regulate the export of cultural objects, including a restriction on objects of importance. The PMCH Act differentiates between Aboriginal and Torres Strait Islander and non-Aboriginal or Torres Strait Islander paintings, with the former requiring export approval for all paintings older than 20 years and over \$10,000 and the latter requiring approval for all art older than 30 years and over \$250,000. Unlike similar legislation in the UK, the Australian regulations are not able to recommend the federal government buy any works deemed too important to be exported – leaving these works in a form of limbo, unable to be exported but potentially unable to find a local buyer, or only at a lower price – a woeful result for both the artist and the stability of the market.

These anomalies of the PMCH Act have long been criticised; a prominent American collector stated 'there is no reason for a sane and rational US collector to collect Australian Aboriginal art that falls within the purview of the cultural regulations. These well-intentioned regulations are seriously out of date and in some instances they work against the best interests of the artists' (Wilkerson cited in Raffan 2012). In the highly competitive global art market – and the tiny and precarious place of Aboriginal and Torres Strait Islander art within it – the disincentives of the PMCH Act are potentially significant.

Opportunities

While the Aboriginal and Torres Strait Islander art market has seen a sustained downturn (Commonwealth of Australia 2012), art businesses remain optimistic, though with caveats about the realities of the international art market: 'Recent shows of Indigenous art in Paris, Holland and the US have helped lift the profile of that art to some degree. However, our art and its market are largely still quite insular. Again this doesn't mean it's not successful here – just that it's still by and large a world unto itself' (McCulloch 2014).

New markets (e.g. China) continue to be overshadowed by the established markets of Europe and North America (Newstead 2010, Woodhead and Acker 2014), a view endorsed by Austrade: ‘America’s sophisticated investors, collectors and wealthy elite are prepared to part with their money for quality art and should be targeted by Australian artists’ (Newman cited in AAP 2008). However, these market opportunities may be at odds with national political interest focusing on Australia’s place in the region and our economic links to China.

Compared with other art in the international art market, Aboriginal and Torres Strait Islander art is competitively priced according to a Singapore-based gallery: ‘Price points for good Aboriginal art are incredibly low; simultaneously, Aboriginal art is a fantastic product – there is an incredible variety of styles and works, there are so many ways to present and understand Aboriginal art’ (G Pilla 2014, pers. comm. *ibid*). To capitalise on the opportunities for Aboriginal and Torres Strait Islander art globally, advocates argue for a concerted, uncomplicated focus on presenting high quality art, in contemporary fine art settings, supported by educational material and framed by investment in non-commercial exhibitions of art and culture. This is a reprise of the approach designed and delivered by the AAB nearly four decades earlier and is in line with a wide range of scholarship into the drivers of value creation in the arts and cultural sector (Rodner and Thomson 2013, Smith 2008).

Conclusion

The art of Aboriginal and Torres Strait Islander people has generated important economic, political and social capital for artists and for Australia’s cultural landscape. The art itself, while a site for some of the complex and unresolved issues between Aboriginal and Torres Strait Islander and non-Aboriginal or Torres Strait Islander Australia, is also widely acknowledged as a singular creative success, having produced the country’s ‘richest and most diverse art’ (Smith 2008, p. 34). This success has seen a forty-year-long push for recognition by international art markets, a push that has met with, at best, mixed results. While a cluster of connoisseurs and collectors exist in North America and Europe and a small number of commercial galleries operate in these markets, all the experience to date indicates that the international market will only ever be a niche one for Aboriginal and Torres Strait Islander art. The early successes have not been sustained, nor is there a likelihood of recreating the scale and scope of the international promotion that was undertaken in the 1970s and 1980s.

The evidence shows that only a limited amount of artwork is traded into international markets and that the overall place of Aboriginal and Torres Strait Islander art globally is insignificant. While a small number of elite-level works of Aboriginal and Torres Strait Islander art will continue to be sold to international buyers and Australia will continue to ‘brand’ itself with images created by these artists, for the overwhelming majority of artists and their artworks, the real and ongoing art market remains with Australian consumers and galleries.

Despite the limited opportunities and significant barriers for any art business or institution entering the international art world, being part of the global ‘art machine’ (Rodner and Thomson 2013) will remain a key activity. There remain good reasons for taking on such challenges; the aim of this paper is to ensure that such endeavours may understand the reality that only a small and specific niche for Aboriginal and Torres Strait Islander art exists internationally. This niche is also often at odds with commercial agendas or national interests. If, however, these international art market realities and limitations are acknowledged, there are genuine opportunities to present and sell the best of Aboriginal and Torres Strait Islander art and creativity to global audiences.

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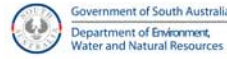
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