Understanding buyer behaviour in the primary market for Aboriginal and Torres Strait Islander art

A cross-disciplinary study in marketing and arts management

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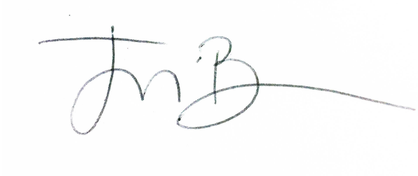
Declaration

I declare that this thesis presents work carried out by myself and does not incorporate without acknowledgment any material previously submitted for a degree or diploma in any university; and to the best of my knowledge it does contain any materials previously published or written by another person except where due reference is made in the text; and all substantive contributions by others to the work presented, including jointly authored publications, is clearly acknowledged.



Jessica Adelaide Booth

Background on the researcher

My academic background is in the fine arts and curatorial studies; I hold a Bachelor of Fine Arts (Painting) and a Masters of Art Curatorship. This cross-disciplinary thesis is, therefore, my first foray into the marketing discipline. Further, I commenced this degree at the David Unaipon College for Indigenous Education and Research, but early in my candidature decided that the study would benefit from having a more rigorous consumer behaviour lens applied to it. I applied to transfer to the Ehrenberg-Bass Institute for Marketing Science just before commencing quantitative data collection. Whilst not without its challenges, it has been a rewarding experience to take on an entirely new discipline. Straddling the disciplines of marketing and arts management, this thesis brings together two very different bodies of knowledge. I do hope this is one of its key strengths.

List of abbreviations

ABS:	Australian Bureau of Statistics
ACCC:	Australian Competition and Consumer Commission
AEP:	Aboriginal and Torres Strait Islander Art Economies Project
AOCs:	Appellations d'Origine Contrôlées
ANKAAA:	Association of Northern, Kimberley and Arnhem Aboriginal Artists
ANOVA:	Analysis of Variance
ATSI:	Aboriginal and Torres Strait Islander
ATSIC:	Aboriginal and Torres Strait Islander Commission
CIAF:	Cairns Indigenous Art Fair
CoC:	Codes of conduct
CRC-REP:	Cooperative Research Centre for Remote Economic Participation
DAAF:	Darwin Aboriginal Art Fair
HREC:	Human Research Ethics Committee
MSoD:	Many Sets of Data
QC:	Queen's Counsel
SMSF:	Self-Managed Superannuation Fund
SPSS:	Statistical Package for the Social Sciences
'The Code':	Indigenous Art Code

Abstract

The commercial market for Aboriginal and Torres Strait Islander art has contracted significantly in recent years (Commonwealth of Australia 2012; Newstead 2011; Wilson 2010a) after reaching a peak in 2007. Despite this downturn, production has actually *increased* with the expansion of government-funded Art Centres, resulting in an over-supply of lower and mid-range artworks, many of mediocre quality (Bendor, von der Heidt & Acker 2013). As the 'fine art' market is predicated upon notions of scarcity and high quality to maintain demand, some argue that a mismatch between supply and demand in the lower and middle markets (defined in this thesis as artworks sold for between $500 and $5,000), combined with the market downturn and persistent media reportage about 'dodgy dealers' and fake artworks (for example, see Rothwell 2006), has affected consumer confidence (Boland 2011b, 2011a; Liston 2011; Wilson-Anastasios 2011). However, little research exists on the buyers of Aboriginal and Torres Strait Islander art (Acker, Stefanoff & Woodhead 2012) and knowledge of their purchase preferences, behaviours and views on a range of industry issues remains ad hoc and anecdotal.

Understanding consumers is fundamental to any functioning market (Calder 2001). In recognition of this, an established body of marketing literature exists on known patterns of consumer behaviour (Ajzen & Fishbein 1977; Auger & Devinney 2007; Belk 1974; Ehrenberg, Uncles & Hammond 1995; Holbrook 1999) in various product and service markets. It is widely accepted that in aesthetic product markets, taste plays a role in judgment and decision-making (Bloch 1995; Bourdieu 1984; Hoyer & Stokburger-Sauer 2012; Schindler, Holbrook & Greenleaf 1989). Consumers also use quality cues to make purchase decisions (Hamlin 2010; Ismail & Barber 2008; Lockshin & Hall 2003; Richardson, Dick & Jain 1994; Teas & Agarwal 2000; Verbeke & Ward 2006; Yuan 2005; Zeithaml 1988), and 'trade offs' occur among desirable alternatives (Johnson 1974). This cross-disciplinary thesis, engaging the fields of marketing and arts management, applied these constructs to the lower and middle price tiers of the Aboriginal and Torres Strait Islander primary art market (the market into which an artwork is sold for the first time), in order to better understand consumer choice in this market. Also explored were buyer awareness levels and perceptions of artwork provenance, available information and industry regulation, particularly the Indigenous Art Code (defined below). A two-tiered mixed methods study was designed and carried out by the author: 874 consumer surveys were conducted at three annual art-buying events in 2012 (Darwin Aboriginal Art Fair, Cairns Indigenous Art Fair

and Desert Mob), then 20 in-depth interviews were conducted with both buyers and sellers of Aboriginal and Torres Strait Islander art.

Provenance is “the place of origin or earliest known history of something” (Oxford English Dictionary 2013) – in this context an artwork’s source. Valued in all fine art markets (Athineos 1996; Burton 2007; Fritzke 2008), provenance is particularly important in the Aboriginal and Torres Strait Islander art market which, “like all raw, rough markets…has been plagued by problems, authenticity and provenance to the fore” (Rothwell 2009). Provenance is often presented in this market as an indicator of the ethical (or otherwise) circumstances in which an artwork was produced. As is done in many markets (Smith Maguire 2013), sellers of Aboriginal and Torres Strait Islander art leverage provenance in their marketing efforts, often foregrounding these ethical dimensions. This presupposes that buyers are concerned with the provenance of artworks they buy, and certainly in the higher price tiers of primary and secondary markets this is often true (Cole 2011; Gennochio 2008; Myers 2002; Taylor & Coleman 2011; Wilson-Anastasios 2009). However, there is little evidence to prove lower and middle market buyers value provenance. Literature on ethical consumption also tells us that there is often a gap between attitudes and behaviours in the measurement of ethical purchase choices (Ajzen & Fishbein 1977; Auger & Devinney 2007; Sharp 1997) and that “survey radicals turn into economic conservatives at the checkout” (Devinney et al. 2010). These constructs are investigated in relation to buyer interest in provenance in the lower and middle price tiers of the primary market.

Business and industries develop codes of conduct (CoCs) with the aim of influencing the practices of supply chain partners, providing a baseline of expected standards for buyers and sellers (Mamic 2005). Where CoCs have the ability to enforce compliance they can be effective in dictating behaviour; though this is often not the case (Awaysheh & Klassen 2010; Emmelhainz & Adams 1999). The Indigenous Art Code (‘the Code’), a voluntary code open to all sellers of Aboriginal and Torres Strait Islander art, was designed in part to assist consumers in making informed purchase choices (Acker 2009; Australia Council for the Arts 2009; Eccles 2009; Raffan 2013). The Code, however, has limited enforcement ability, a fact that its Chairman, QC Ron Merkel, has described as "a structural flaw" (Raffan 2013, p.61). Further, the Code’s effectiveness is predicated upon consumers being aware of and utilising it to guide their purchase choices (Acker 2009; Eccles 2009). Despite this, little is known of how consumers perceive this regulatory measure, if they do at all – vital information given the Code’s efficacy in “creat[ing] customer demand for high ethical standards” (Haider, in Raffan 2013, p.60) is currently under scrutiny by the industry. Whether or not lower and middle market buyers feel they have adequate access to reliable information (on the market, on agents, or on the provenance of works they buy) to assist them in making purchase decisions was also unknown prior to this thesis.

Using demographic, attitudinal and behavioural measures, this study sought to understand consumer profiles and purchase preferences in the lower and middle price tiers. Whilst demographic data did not enable great insight into buyers, attitudinal and behavioural measures did. As discovered by Belk and Groves (1999), whose study highlighted the need for a detailed examination of consumer profiles and preferences, a continuum of knowledge exists amongst buyers of Aboriginal and Torres Strait Islander art. Results from this thesis establish two broad consumer typologies – 'decorators' and 'collectors' – with the former having little knowledge or enduring (Richins & Bloch 1986) or purchase-specific (Mittal 1989) involvement with Aboriginal or Torres Strait Islander art and being mostly guided by the needs of their interior space, and the latter having more specific tastes guided by higher involvement levels and their ability to perceive product quality (Zeithaml 1988). Whilst quality is a difficult term to define (Charters & Pettigrew 2003; Steenkamp 1989; Zeithaml 1988), this finding supports a broad segmentation of buyers based upon their involvement levels (Ismail & Barber 2008). However, involvement has, historically, been over-emphasised as a causal influence upon consumer choice (Sharp 2010), and certainly this thesis revealed a range of other influencing factors.

The majority of buyers purchased from Art Centres, commercial galleries or art fairs, and few expressed resolute adoption of any one purchase method, supporting the idea that consumers are polygamous in their loyalty to agents, as they are for brands (Sharp 2010). Acrylic paintings were by far the most commonly purchased medium, suggesting that artists working in other mediums may be at a market disadvantage. 70% of survey respondents had spent under $500 on their most recent purchase, with obvious implications for the incomes of artists and agents. As expected, in light of the literature (Coleman 2004; Davies 2006; Hirschman 1983; Holbrook & Zirlin 1985; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007), aesthetic appeal was central to the purchase choices of most buyers. Many also claimed that provenance was important (either in terms of its financial or intrinsic value, or as an assurance of agent ethics). However, as attitudes are often poor indicators of future behaviour (Auger & Devinney 2007; Sharp 1997; Wright & Klÿn 1998), the extent to which provenance and aesthetics are 'traded off' (Johnson 1974) when making purchase choices is not clear. Agent perspectives on consumer interest in provenance support the notion that some buyers over-claim this interest in terms of their actual purchase behaviour, perhaps reflecting the influence of social desirability bias (Bruner & King 2000).

Across both samples, buyers expressed uncertainty about agent claims of ethical dealing and, as noted in the literature (Ariely 2008; Bolton, Warlop & Alba 2003; Butler 2000; Monroe 1973), pricing disparities and variations in product quality (Zeithaml 1988) compound this issue. The theory that consumers have a tendency to assume the worst (Johnson & Levin 1985), inferring negative attributes as substitutes for missing product information (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982; Sharp & Romaniuk 2004), was evident in these results. Finally, the majority of buyers were either unaware of the Indigenous Art Code's existence or, if they were aware, did not utilise it when making purchase choices.

This thesis makes an empirical contribution to academic literature in the fields of marketing and arts management. By identifying the profiles, purchase characteristics and criteria used by consumers to make purchase choices, it has tested existing consumer choice theories and contributes hitherto unavailable baseline industry data that will allow artists, Art Centres and agents to develop their offerings in a competitive marketplace. By creating new knowledge regarding consumer perceptions of a range of industry issues, this thesis makes a significant contribution that will assist decision-makers in understanding how existing policies and industry norms are being understood and utilised in the marketplace. Until now this information did not exist, and by creating it this thesis provides a descriptive base from which future research can be developed, with the aim of contributing to a more resilient Aboriginal and Torres Strait Islander art sector.

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Chapter One: Introduction

This chapter introduces the topic, the research problem this thesis addresses and the research questions used to do so. It describes the methods used, then highlights the key findings, contributions and limitations of the thesis. Finally, an overview of each chapter is provided.

Introducing the topic

The commercial market for Aboriginal and Torres Strait Islander[1] art has contracted significantly in recent years (Commonwealth of Australia 2012; Newstead 2011; Wilson 2010a) after reaching a peak in 2007. Despite this downturn, production of Aboriginal and Torres Strait Islander art has actually *increased* in line with the expansion of government-funded Art Centres, resulting in an over-supply of lower and mid-range artworks, many of mediocre quality (Bendor, von der Heidt & Acker 2013). As the 'fine art' market is predicated upon notions of scarcity and high quality to maintain demand, some argue that a mismatch between supply and demand in the lower and middle markets (defined in this thesis as artworks sold for between $500 and $5,000), combined with the market downturn and persistent media reportage about 'dodgy dealers' and fake artworks (for example, see Rothwell 2006), has affected consumer[2] confidence (Boland 2011b, 2011a; Liston 2011; Wilson-Anastasios 2011). However, little research exists on the buyers of Aboriginal and Torres Strait Islander art (Acker, Stefanoff & Woodhead 2012) and knowledge of their purchase preferences, behaviours and views on a range of industry issues remains ad hoc and anecdotal.

Understanding consumers is fundamental to any functioning market (Calder 2001). Consumer behaviour "includes all the activities of buyers, ex-buyers and potential buyers from pre-purchase deliberation to post-purchase evaluation, and from continued consumption to discontinuance" (Foxall 2005,

[1] This thesis uses 'Aboriginal and Torres Strait Islander' at all times to describe the art, artists and market with which it is concerned. In doing so, it acknowledges the distinct nature of Aboriginal and Torres Strait Islander cultures. Where 'Aboriginal' only is used, it is because 'Torres Strait Islander' is not relevant to the issues being discussed, and vice versa. The term 'Indigenous' is used only when referencing wording used in this thesis' survey instrument, which for brevity used 'Indigenous' instead of 'Aboriginal and Torres Strait Islander' in some questions. It is also used, again for brevity, when discussing 'non-Indigenous' art or people (instead of non-Aboriginal or Torres Strait Islander).
[2] The terms 'consumer' and 'buyer' are used interchangeably throughout this thesis.

p.15). An established body of marketing literature exists on known patterns of consumer behaviour (for example, see Ajzen & Fishbein 1977; Auger & Devinney 2007; Belk 1974; Ehrenberg, Uncles & Hammond 1995; Holbrook 1999) in various product and service markets. It is widely accepted that in aesthetic product markets, taste plays a role in judgment and decision-making (Bloch 1995; Bourdieu 1984; Hoyer & Stokburger-Sauer 2012; Schindler, Holbrook & Greenleaf 1989). We also know that consumers often use quality cues to make purchase decisions (Hamlin 2010; Ismail & Barber 2008; Lockshin & Hall 2003; Richardson, Dick & Jain 1994; Teas & Agarwal 2000; Verbeke & Ward 2006; Yuan 2005; Zeithaml 1988), and that 'trade offs' occur among desirable alternatives (Johnson 1974).

This cross-disciplinary thesis, engaging the fields of marketing and arts management, applies these constructs to the lower and middle price tiers of the Aboriginal and Torres Strait Islander primary art market (the market into which an artwork is sold for the first time), in order to better understand consumer choice. It documents consumer profiles (using demographic, attitudinal and behavioural measures), past purchase behaviour and the criteria buyers claim to use when evaluating purchase choices. Also explored are buyer awareness levels and perceptions of artwork provenance, available information and industry regulation, particularly the Indigenous Art Code (terms defined below). Thus, this thesis is concerned with the post-evaluation phase of consumer behaviour, which has important implications for future purchase patterns (Foxall 2005).

Provenance is "the place of origin or earliest known history of something" (Oxford English Dictionary 2013), and may also refer to a product's mode of production or heritage (Smith Maguire 2013). In the context of artworks, provenance indicates an artwork's source and history of ownership. A desired attribute in all fine art markets (Athineos 1996; Burton 2007; Fritzke 2008), provenance is particularly important in the Aboriginal and Torres Strait Islander art market which, "like all raw, rough markets…has been plagued by problems, authenticity and provenance to the fore" (Rothwell 2009). For Aboriginal or Torres Strait Islander artworks, provenance is often presented in the marketplace as an indicator of the ethical (or otherwise) circumstances in which the artwork was produced. For example, artworks with Art Centre provenance are often presented as having been produced in more ethical circumstances than artworks produced outside of Art Centres (Australian Art Collector 2010).

Sellers often leverage the ethical dimensions of provenance in marketing efforts and purchase negotiations[3]. Provenance is also used as a selling tool in other product markets, conferring authenticity, heritage or quality upon products (Smith Maguire 2013). Provenance can be a "highly regulated construct" (in the wine market, for example, the system of Appellations d'Origine Contrôlées denotes wines produced in certain regions of France, under certain conditions (Albert 1998)) or somewhat "stylised" or even "fictional" (Smith Maguire 2013, p.368). In other words, provenance can be verifiable, according to a set of standards or criteria set out in regulation, or it can be demonstrated by individual sellers in different ways, meaning it may be embellished or even fabricated as a marketing tool. In the Aboriginal and Torres Strait Islander art market, provenance is often demonstrated through

[3] Please see the footnote on page 55 for examples of this. Provenance is, however, multidimensional, and can be used to demonstrate a range of product attributes. For example, a seller may emphasise an artwork's geographic source (such as a remote community renowned for producing excellent art) in order to suggest the excellence of another artwork from that community – or even its economic value. This thesis will focus on the ethical dimensions of provenance, as these have the most direct relevance to the current fragility of the sector and related consumer perceptions of agents and Art Centres. However, other dimensions of provenance – such as those relating to an artwork's value as a handcrafted object from a remote or 'exotic' location – are also explored where appropriate.

the use of Certificates of Authenticity, which attribute an artwork to an artist and provide details of its title, dimensions, medium and source.

In theory, provenance information (and documentation) provides a buyer with the assurance that an artwork was produced by the artist it is attributed to, in the location and circumstances described in the documentation. This can be important if that buyer seeks to resell that artwork in the future. In reality, however, Certificates of Authenticity can sometimes be lacking in detail or even fabricated in a minority of cases, which may lead to consumer mistrust in both sellers and the market more broadly. It is often assumed that buyers are concerned with the provenance of artworks they buy, and certainly in the higher price tiers of both primary and secondary markets this is true (Cole 2011; Gennochio 2008; Myers 2002; Taylor & Coleman 2011; Wilson-Anastasios 2009). However, there is little evidence to support the view that buyers in the lower and middle price tiers of the primary market value provenance, or if they do, that they enact these values when making purchase choices. It is reasonable to assume that a new or uninformed buyer may have little or no knowledge of Certificates of Authenticity, or of the importance of provenance. Further, literature on ethical consumption tells us there is often a gap between attitudes and behaviours in the measurement of ethical purchase choices (Ajzen & Fishbein 1977; Auger & Devinney 2007; Sharp 1997) and that "survey radicals turn into economic conservatives at the checkout" (Devinney et al. 2010). This thesis investigated these constructs in relation to buyer interest in provenance in the lower and middle price tiers.

Consumers in all product markets frequently make purchase choices with only imperfect information available to them (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982), and have a tendency to 'assume the worst' in such situations, inferring negative product attributes where information is missing (Johnson & Levin 1985). Further, the more uncertainties a consumer has about a product, the less certain they will be about choosing it (Sharp & Romaniuk 2004). Despite this, consumers generally do not work hard to seek out extensive product information (Sharp & Romaniuk 2004), meaning that purchase choices are often based upon superficial judgments which combine to assuage a buyer's concerns arising from missing information and create an overall perception that the product or the person selling it 'will do' (Crozier & McLean 1997). This thesis explored this tendency in relation to Aboriginal and Torres Strait Islander art purchases, which are relatively infrequent, meaning that buyers can have limited knowledge about the product or the agent selling it. Whether or not lower and middle market buyers feel they have adequate access to reliable information (on the market, on agents, or on the provenance of works they buy) to assist them in making purchase decisions was also unknown prior to this thesis.

Business and industries develop codes of conduct (CoCs) with the aim of influencing the practices of supply chain partners, providing a baseline of expected standards for buyers and sellers (Mamic 2005). Where CoCs have the ability to enforce compliance they can be effective in dictating behaviour; though this is often not the case (Awaysheh & Klassen 2010; Emmelhainz & Adams 1999). The Indigenous Art Code ('the Code'), a voluntary code open to all sellers of Aboriginal and Torres Strait Islander art, was implemented in 2010 in response to the activities of a small number of unscrupulous dealers whose unethical behaviour was creating consumer mistrust regarding provenance and attribution in the wider market (Commonwealth of Australia 2007; De Marchi & Wilson-Anastasios 2009; Wilson-Anastasios 2011). The Code was designed in part to assist consumers in making informed purchase choices (Acker 2009; Australia Council for the Arts 2009; Eccles 2009; Raffan 2013) in relation to these issues. The Code, however, has limited enforcement ability, a fact that its Chairman, QC Ron Merkel, has described as "a structural flaw" (Raffan 2013, p.61). Further, as noted in the literature, the Code's effectiveness is predicated upon consumers being aware of and utilising it to guide their purchase choices (Acker 2009; Eccles 2009). Before this thesis, almost nothing was known of how consumers perceive this regulatory measure, if they do at all. As 'awareness' is the endpoint of a highly selective information-processing procedure (Foxall 2005), messages that do filter through and are sufficiently important to a buyer can be regarded as having at least some bearing upon their purchase choices. This is particularly relevant given the Code's efficacy in "creat[ing] customer demand for high ethical standards" (Haider, in Raffan 2013, p.60) is currently under scrutiny by the industry.

This research forms part of a wider research project, the Aboriginal and Torres Strait Islander Art Economies Project (AEP), conducted through the Cooperative Research Centre for Remote Economic Participation, Alice Springs. The AEP seeks to document and analyse the complex supply chain within which Aboriginal and Torres Strait Islander artworks circulate, with the aim of increasing opportunities for artists to participate within that supply chain[4].

[4] For more information about the AEP please see http://crc-rep.com/research/enterprise-development/aboriginal-and-torres-strait-islander-art-economies

Defining the topic

Aboriginal and Torres Strait Islander art

Aboriginal and Torres Strait Islander art encompasses a wide array of objects produced by either an Aboriginal or a Torres Strait Islander person. Whilst such art includes objects produced for ceremonial purposes (such as headdresses, woven items and other items used during ceremonies), this research discusses only art that is produced for sale – in other words, art products. These items are predominantly paintings[5], sculptures, works on paper, weavings, ceramics, photography, film and new media, though art form development is occurring all the time. There is great regional and individual stylistic variation within Aboriginal and Torres Strait Islander art[6]

Aboriginal and Torres Strait Islander art market

All art markets can broadly be divided into primary and secondary markets. As previously mentioned, the primary market is the market into which an artwork enters when it is sold for the first time. Importantly, in this market, an artist receives payment for their work[7], whereas in the secondary auction market works are sold between third parties. The Aboriginal and Torres Strait Islander art primary market is layered and complex, and encompasses a vast array of art products for sale, as previously noted, of varying price points and quality.

Though categorisations are necessarily fluid, broadly the lowest price tiers can be defined as the 'tourist' or 'souvenir' market and the highest the 'fine art'

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[5] As this thesis will demonstrate, paintings are the most popular medium produced and consumed, and therefore paintings are the main focus of this research.
[6] Please see Appendix 1 for some examples of low and mid price tier art from a range of remote areas.
[7] A Resale Royalty for Visual Artists was introduced in Australia in 2009, and now provides a 5% royalty to artists on secondary market sales valued over $1,000. This provides some additional income for artists through secondary market sales but, as discussed in more detail in the literature review, has minimal impact on artist livelihoods and has proven administratively burdensome in its implementation.

market. The ‘fine art’ market comprises artworks of high value, in high demand and short supply, often purchased by public institutions or committed collectors. For these works a secondary market exists (Bendor, von der Heidt & Acker 2013; Coate 2008). The ‘tourist’ or ‘souvenir’ market consists of works of lesser value, often less in demand but in greater supply (Cardamone 2007; Coate 2008). The middle market, with which my thesis is primarily concerned, is less easy to define, and encompasses both fine art and works more akin to tourist art. In great supply are works of mediocre quality, marketed as ‘fine art’ but often fulfilling mostly a decorative function, destined to, “like most art, eventually become worthless once tastes and fashions change” (Coate 2009, p.32).

The supply chain connecting Aboriginal and Torres Strait Islander artists, agents and consumers can be very unclear to buyers. Whilst agents were traditionally the mediators between artists, Art Centres and the market, there are now a proliferation of consumption contexts available to the consumer (Acker 2008). The diagrams on the next page represent the shifting consumption landscape in the primary market:

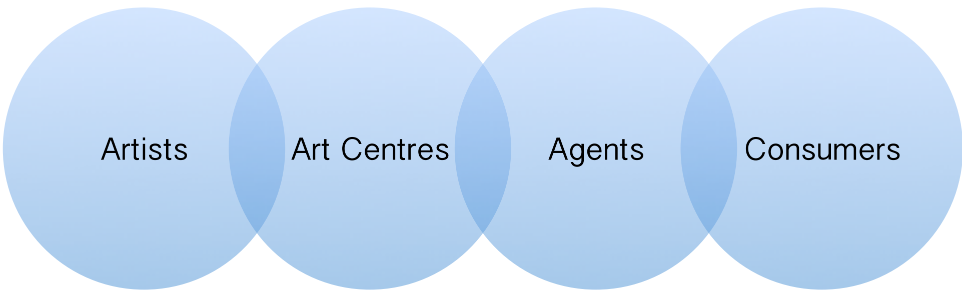

Figure 1: 'Traditional' structure of the Aboriginal and Torres Strait Islander primary art market, with agents operating as intermediaries between Art Centres and consumers.

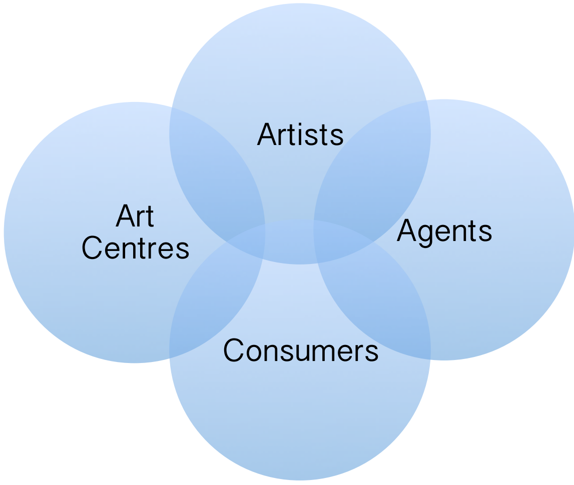

Figure 2: Current primary market structure, wherein buyers increasingly 'go to the source', buying artworks from Art Centres or artists, as well as through commercial agents.

Commercial agents are still intermediaries between artists and the market – they have the resources and social and geographic proximity to buyers that facilitate this position (Wilson-Anastasios 2011) – but some Art Centres now occupy this space too, developing relationships with collectors and staging international exhibitions, meaning the consumer now has additional purchase avenues available to them. Interconnectedness, complexity and uncertainty are inherent to many supply chains and understanding this is essential in order to identify problems and challenge assumptions (Acker, Stefanoff & Woodhead 2012; Woodhead 2009), and this study partly achieves this through its analysis of buyer preferences and perceptions of the consumption channels available to them.

Primary market price tiers

Whilst defining price tiers within the art market is both a fluid and subjective act, for the purposes of this research a segmentation was developed by the AEP research team in order to enable cross-project inferences to be drawn. Lower and middle price tier art products have been defined by the AEP as those sold for more than $500 but less than $5,000. The majority of buyers and sellers surveyed and interviewed for this thesis bought and sold within these parameters. The lower and middle price tiers were chosen as the focus of this thesis because they are the price tiers most artists and consumers interact with, yet they are also the most poorly understood. Price tiers are outlined in further detail in Chapter Three.

Agent types

An agent is defined in this thesis as any party that sells art to consumers, on behalf of artists. An agent could be an Art Centre[8], a retailer or wholesaler such as a gallery or shop, or an online seller. Art Centres are Aboriginal-owned and governed organisations in which art production, marketing and promotion take place. They are usually, but not exclusively, located in remote communities. Art Centres vary in their size, scale of operation and purchasing and consigning practices. A small number of Art Centres purchase stock upfront from artists, but the vast majority take works on consignment.

Other agents include commercial galleries (both physical and online sellers; exhibiting galleries and non-exhibiting retail outlets), private art businesses (such as independent dealers who purchase artwork wholesale and on-sell to retailers or consumers – these dealers usually sell the work of individual

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[8] As is the protocol of Art Centre peak bodies, 'Art Centre' is written as a proper noun throughout this thesis, in order to indicate their distinctiveness from the generalised term, 'art centre', which could refer to other types of arts organisations or retail outlets.

artists working outside of Art Centres), or ‘mixed businesses’ – defined as anyone selling art as a supplementary commercial activity to their core business. An increasingly complex network of agents, employing a combination of the aforementioned business models, characterises the Aboriginal and Torres Strait Islander art industry.

In this thesis, Art Centres and commercial agents are sometimes discussed as distinct agent ‘types’; for example, in discussing buyer perceptions of commercial agents and Art Centres, which can be quite divergent, or in discussing the changing marketplace in which Aboriginal and Torres Strait Islander art is sold (such as in Figures 1 and 2 on pages 9 and 10). Where ‘agent’ refers explicitly to a commercial gallery, this is made clear.

Research scope and boundaries

Given the breadth of Aboriginal and Torres Strait Islander art noted above, it was necessary to contain the parameters of this thesis’ analysis. As such, it is concerned only with *visual art* produced by artists in *remote and very remote Australia* (see Figure 3 on the next page).

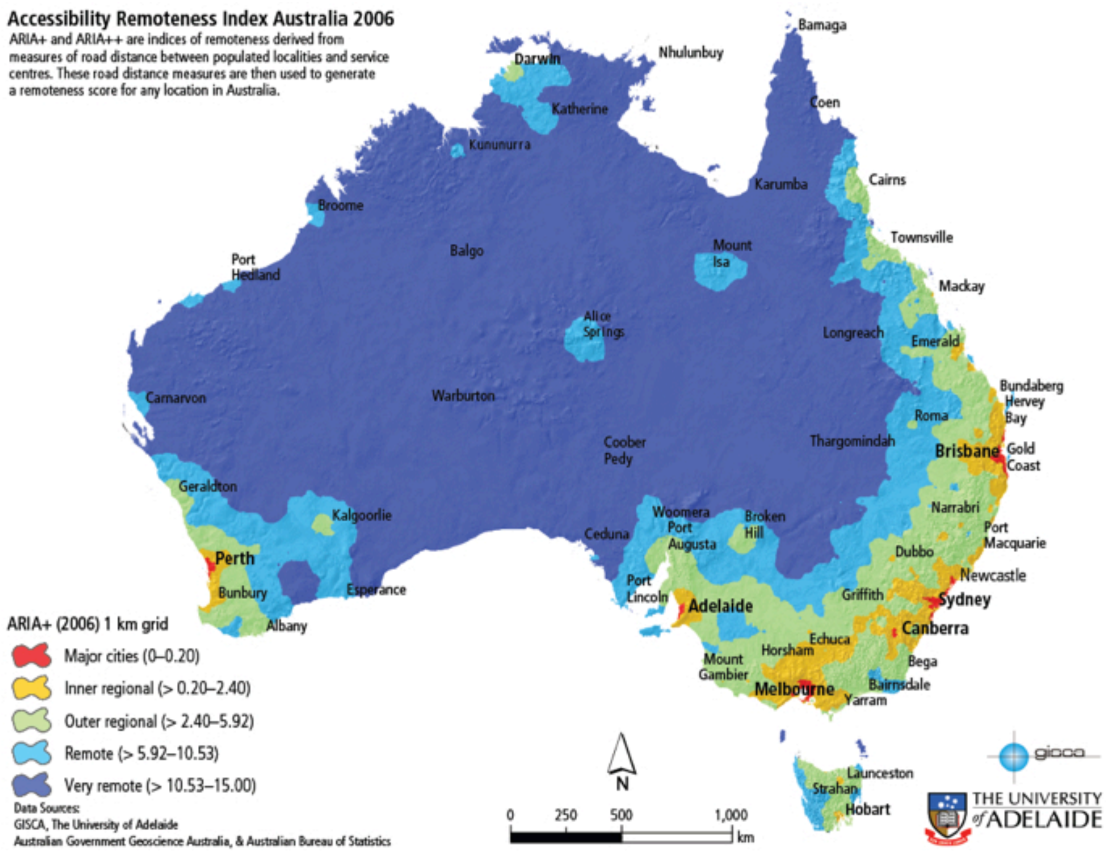

Figure 3: Map of Australia showing 'remote' and 'very remote' areas in shades of blue. This thesis is concerned with art produced in these blue areas. Image courtesy of the University of Adelaide.

The reasons for this limitation are multiple:

1. The AEP is focused on improved livelihoods for people living in remote areas of Australia (Ninti One Limited 2013);
2. Art by remote area artists comprises a significant component of the commercial market for Aboriginal and Torres Strait Islander art[9];
3. The distance (both geographical and cultural[10]) between producer and consumer is greatest between remote area artists and largely metropolitan consumers. Therefore, this is the part of the market where the supply chain linking producers and consumers is most complex,

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[9] An estimate of the size of the remote art component of the Aboriginal and Torres Strait Islander art market was not available at the time of writing. The literature review contains further detail.
[10] See the literature review for further discussion of these constructs.

and where there is the most risk of fragility, misperceptions and mistrust, as the following passage demonstrates:

> *The tyranny of distance and the art centre system means there are many more intermediaries between the dealer and the artist than in the contemporary* [non-Indigenous] *sector. There are more opportunities for something to go wrong…including the intervention of unscrupulous agents whose activities can impact adversely upon the quality and quantity of work released onto the market* (De Marchi & Wilson-Anastasios 2009; Wilson-Anastasios 2011).

In addition, remote area artists are often at a disadvantage when dealing with both buyers and sellers of their work, due to language barriers and inequities of wealth and education arising from systemic disadvantage and intergenerational poverty (Commonwealth of Australia 2007). For all these reasons, focusing on the part of the art market directly affecting remote area artists was the natural inclination for this research.

Research problem & key research questions

As noted at the beginning of this chapter, despite a recent surge in the global art market (Paumgarten 2013), especially in the US and Asian markets (Azimi & de Changy 2013), the Aboriginal and Torres Strait Islander art market has contracted (Commonwealth of Australia 2012, p.2)[11] across both the primary and secondary markets (Newstead 2011; Wilson 2010a). Despite this, art production has actually *increased*, resulting in an over-supply of lower and mid-range artworks, many of mediocre quality (Bendor, von der Heidt & Acker 2013). A mismatch between supply and demand may have affected consumer demand (Liston 2011; Wilson-Anastasios 2011) – with buyers at the high end of the market concerned about the security of their investments and buyers at the middle and lower ends lacking confidence to enter the market or continue purchasing. Federal legislative changes[12], including the introduction of the Resale Royalty Scheme and Indigenous Art Code and changes to superannuation law, have also been blamed for a lack of consumer demand (Boland 2011a) and erosion of consumer confidence.

Despite (or perhaps because of) these market challenges, little research has been undertaken on the buyers of Aboriginal and Torres Strait Islander art (Acker, Stefanoff & Woodhead 2012) and knowledge of buyer behaviour remains ad hoc and anecdotal. Indeed, the Aboriginal and Torres Strait Islander art primary market overall is "poorly understood [and] under-researched" (Acker, Stefanoff & Woodhead 2012, p.3). As Wiedmann, Hennigs and Siebels (2009) have noted, understanding buyer behaviour first requires an understanding of who the buyers are. One study (Belk & Groves 1999), which undertook qualitative interviews with buyers and sellers of

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[11] Comprehensive data for the overall Aboriginal and Torres Strait Islander art market does not exist, which is why this statistic has been used. Again, see the literature review for further discussion.

[12] A range of legislative measures is discussed in the final section of the literature review.

Aboriginal art in the primary market, briefly discussed consumer profiles, positioning buyers along a “continuum of knowledge” from souvenir buyers to high end collectors (Belk & Groves 1999, p.28). This study highlighted the need for a detailed examination of consumer profiles and preferences in the primary market.

Some research does exist on buyers in secondary markets, and the activities of high-end collectors are visible through glossy publications of their private collections (see Laverty 2008; Raffan 2012a). Secondary market studies examine price formation in auction contexts (Coate 2009; Lim, Tressler & Webber 2008; Wilson-Anastasios 2009) and Aboriginal and Torres Strait Islander art as investment (Taylor & Coleman 2011). Wilson-Anastasios (2009) argues that major Australian auction houses have significant control over buyer behaviour and price formation, and Taylor and Coleman (2011) found that the unique features of Aboriginal art (particularly works using traditional media, such as bark paintings) significantly affect prices achieved at auction[13]. Whilst it is unlikely that lower and middle price tier buyers purchase for investment purposes, but until this thesis knowledge of their spending behaviour and purchase preferences was limited.

Marketing literature tells us that people habitually purchase from a small but established repertoire of brands and that they are polygamous in their loyalty to those brands (Ehrenberg, Uncles & Hammond 1995; Sharp 2010). Further, consumer loyalty is strongly driven by opportunity (Sharp 2010, p.98). It was pertinent to apply these constructs to the Aboriginal and Torres Strait Islander art market, in order to understand whether buyers in this market display

[13] Whilst the secondary and high-end primary markets are quite different to the lower and middle price tiers of the primary market (secondary and high-end primary market buyers are more likely to buy for investment than low and middle market buyers (Barclays Bank 2012; Baumol 1986; Frey & Pommerehne 1989; Friswell 2010; Wilson-Anastasios 2009)), this literature is still relevant and is discussed further in the literature review.

polygamous loyalty to a repertoire of agents, or ‘types’ of agents (such as commercial galleries or Art Centres). Certainly some choose Art Centre-sourced work, “marketed as untainted” (Rothwell 2009) and often portrayed as the only ethical provenance[14], and it has been said that buyers have a “jaundiced view” of commercial agents (Oster 2009, p.71), but there is little empirical evidence to support this. Further, it is not known whether a buyer’s level of ‘involvement’ with the art market, or with a particular purchase, influences their choice (Hamlin 2010; Ismail & Barber 2008; Mittal 1989).

These knowledge gaps are addressed through this thesis’ first research question:

RQ1: *What are the profiles and purchase characteristics of consumers in the lower and middle price tiers of the primary market for Aboriginal and Torres Strait Islander art?*

In answering this question, this thesis contributes to the small body of literature on buyers of Aboriginal and Torres Strait Islander art (Belk & Groves 1999; Coate 2009; Lim, Tressler & Webber 2008; Taylor & Coleman 2011; Wilson-Anastasios 2009). Further, by identifying consumer purchase characteristics (such as product type or medium, purchase location and spending behaviours), this thesis builds upon existing research on buyers of hedonic, luxury or non-essential products (Davies 2006; Hirschman 1983; Holbrook & Zirlin 1985; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Veryzer 1993; Vigneron & Johnson 1999; Wagner 1998). Literature on the low and mid tier wine market was also useful in developing this research question, given that, like this market, it is one in which supply outstrips

[14] This is seen by some as an unhelpfully narrow interpretation of ethics (Newstead 2009). Certainly, purchasing outside of the Art Centre system is not in itself unethical; it is estimated that up to 50% of Aboriginal art is produced by artists working outside that system (Acker, Stefanoff & Woodhead 2012).

demand, taste is subjective and product quality highly variable (Charters & Pettigrew 2003). Wine is also considered to have an aesthetic component, making it “a useful tool for investigating…the broader class of aesthetic goods” (Charters & Pettigrew 2003, p.2).

Taste plays a role in choosing aesthetic products (Bloch 1995; Bourdieu 1984; Hoyer & Stokburger-Sauer 2012; Schindler, Holbrook & Greenleaf 1989). Belk and Groves (1999) highlighted the importance of aesthetic taste to purchase choices in the Aboriginal art market, whilst Acker, Stefanoff and Woodhead (2012, p.6) have noted that there exists no published research specifically on “lower and mid-market consumer ‘taste’ for Aboriginal and Torres Strait Islander art”. Some argue that hedonic or aesthetic products (such as art) are subjectively evaluated based on a range of intrinsic, holistic or intangible factors, such as the overall ‘look’ or aesthetic style of an object (Hirschman 1983; Hirschman & Holbrook 1982; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Wertenbroch & Dhar 2000; Wiedmann, Hennigs & Siebels 2009). However, we also know consumers often use quality cues to make purchase choices (Hamlin 2010; Ismail & Barber 2008; Lockshin & Hall 2003; Richardson, Dick & Jain 1994; Teas & Agarwal 2000; Verbeke & Ward 2006; Yuan 2005; Zeithaml 1988), and that in doing so ‘trade offs’ naturally occur among desirable alternatives (Johnson 1974). Wilson-Anastasios (2009) discusses price as one criterion by which buyers assess potential purchases. Further consideration of the cues used by buyers to evaluate purchase choices is required in order to understand demand in this market, and the second research question addresses this:

RQ2: *In their evaluations of Aboriginal and Torres Strait Islander art products, what criteria do consumers in the lower and middle price tiers of the primary market use to make purchase choices?*

This research question follows on from the first, building upon knowledge of consumer preferences by analysing criteria used to make purchase choices. It is addressed through the use of post-purchase recollections, and attitudinal measures. Whilst attitudes are known to be weak indicators of future purchase behaviour (Sharp 1997; Wright & Klÿn 1998), correlations between prior usage and current attitudes are usually high (Sharp 1997), and thus the study of past purchase behaviour can go some way towards understanding current attitudes towards a product or category.

Proclamations of ethical dealing and good provenance are central to the marketing strategies of many agents[15], suggesting they assume that buyers seek sound provenance in the works they buy. However, before this thesis little evidence existed that buyers in the lower and middle price tiers value provenance, or consider it when making purchase choices. Further, buyer perceptions of the availability and reliability of product information (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982) were unknown, as were buyer awareness levels and perceptions of the Indigenous Art Code (Acker 2009; Eccles 2009). The system of Appellations d'Origine Contrôlées (AOCs) in the wine market has considerable similarities with the certificates of authenticity[16] used in this market, with AOCs having been introduced at least partly to protect consumers from unscrupulous wine sellers (Teil 2010). This literature, and literature on the effectiveness of codes of conduct (Awaysheh & Klassen 2010; Emmelhainz & Adams 1999) informed the final research question:

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[15] Whilst there no academic references could be found to support this statement, a brief look at the websites of sellers confirms it. This is discussed further on page 74.

[16] See Appendix 2 for an example of a certificate of authenticity, and the literature review for further discussion.

RQ3: *What awareness levels and perceptions exist among consumers regarding artwork provenance, available consumer information and industry regulation?*

Through this final research question, this thesis begins to map the perceptions and possible misperceptions of buyers in relation to agent types, provenance, and their awareness of industry attempts, such as the Indigenous Art Code, to guide them through an ethical purchase process. This information will assist decision-makers in understanding how existing policies and industry norms are being understood and utilised in the marketplace.

Aboriginal and Torres Strait Islander artists in remote Australia often live in very different social, economic and cultural circumstances to non-Indigenous Australians (Altman 2007a). Whilst the majority of non-Indigenous artists live in urban or regional centres with direct access to galleries and buyers (Coate 2009), many remote area artists are geographically and culturally removed from art markets and have little contact with largely metropolitan-based consumers. Remote area artists do not necessarily have the same 'regimes of value' (Appadurai 1986), or priorities, as non-Indigenous consumers of their art. Artists will benefit from increased information about the buyers of their art, as this will enable them to better understand the markets in which they participate. Agents will also benefit as they navigate shifts in the supply chain and decide how best to invest their limited resources to develop their businesses (Awaysheh & Klassen 2010). And policy makers and the wider industry will benefit from increased understanding of how existing regulation and industry norms are being perceived in the marketplace.

Research design

Following a review of the literature, a two-tiered mixed methods research design was devised. Firstly, 874 consumer surveys were conducted at three annual art-buying events in 2012 (Darwin Aboriginal Art Fair, Cairns Indigenous Art Fair and Desert Mob), then 20 in-depth interviews were conducted with both buyers (n=10) and sellers (n=10) of Aboriginal and Torres Strait Islander art. This mixed methods approach enabled broad insights into consumer profiles, purchase preferences, and decision-making through quantitative surveys, followed by the triangulation of findings and exploration of themes identified through in-depth interviews. The combination of these methods was necessary to gain a deep understanding of consumer decision-making in this market.

The data presented in this thesis is largely exploratory and descriptive in nature. As previously noted, despite the importance for any market of understanding “the needs of the buyer” (Grimes & Milgram 2009), there is very little published literature on the attitudes and behaviours of buyers in the primary market for Aboriginal and Torres Strait Islander art. Therefore, it was necessary for this thesis to map some baseline information – namely the profiles, purchase characteristics, purchase criteria and perceptions of buyers – before further research could be undertaken.

Key findings

RQ1: *What are the profiles and purchase characteristics of consumers in the lower and middle price tiers of the primary market for Aboriginal and Torres Strait Islander art?*

Whilst demographic data did not provide great insight into buyers, it enabled the collation of information of use to marketers and agents seeking to more accurately target buyers. Attitudinal and behavioural measures provided great insight into consumer profiles. As discovered by Belk and Groves (1999), whose study highlighted the need for a detailed examination of consumer profiles and preferences, a continuum of knowledge exists amongst buyers of Aboriginal and Torres Strait Islander art. Two broad consumer typologies were established – 'decorators' and 'collectors' – with the former having little knowledge or enduring (Richins & Bloch 1986) or purchase-specific (Mittal 1989) involvement with Aboriginal or Torres Strait Islander art and being mostly guided by the needs of their interior space, and the latter having more specific tastes guided by higher involvement levels and their ability to perceive product quality (Zeithaml 1988). Whilst quality is a difficult term to define (Charters & Pettigrew 2003; Steenkamp 1989; Zeithaml 1988), this finding supports a broad segmentation of buyers based upon their involvement levels (Ismail & Barber 2008). However, involvement has, historically, been over-emphasised as a causal influence upon consumer choice (Sharp 2010), and certainly this thesis revealed a range of other influencing factors.

Whilst the majority of buyers purchased from Art Centres, commercial galleries or art fairs, few expressed resolute adoption of any one purchase method, supporting the idea that consumers are polygamous in their loyalty to agents, as they are for brands (Sharp 2010). Acrylic paintings were by far the most commonly purchased medium, suggesting that artists working in other mediums may be at a market disadvantage. 70% of survey respondents had spent under $500 on their most recent purchase, with obvious implications for the incomes of artists and agents.

RQ2: *In their evaluations of Aboriginal and Torres Strait Islander art products, what criteria do consumers in the lower and middle price tiers of the primary market use to make purchase choices?*

As expected, in light of the literature (Coleman 2004; Davies 2006; Hirschman 1983; Holbrook & Zirlin 1985; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007), aesthetic appeal was central to the purchase choices of most buyers. Further, the pleasure, or emotional response, provided through the purchase of art (Lagier & Godey 2007) was claimed to be important to many, as was an altruistic element to buying Aboriginal or Torres Strait Islander art, echoing the findings of Woodward (2003), and literature on intentions towards ethical consumption (Auger & Devinney 2007; Carrington, Neville & Whitwell 2010; De Pelsmacker, Driesen & Rayp 2005; Devinney et al. 2010; Freestone & McGoldrick 2008; Vermeir & Verbeke 2006). This sense of altruism was often raised in relation to provenance, particularly as an assurance of the fair remuneration of artists. As we know that attitudes are often poor indicators of future behaviour (Auger & Devinney 2007; Sharp 1997; Wright & Klÿn 1998), the extent to which provenance and aesthetics are ‘traded off’ (Johnson 1974) when making purchase choices is not clear.

RQ3: *What awareness levels and perceptions exist among consumers regarding artwork provenance, available consumer information and industry regulation?*

As noted above, many buyers claimed that provenance was important to their purchase choices, either in terms of the financial or intrinsic value of good provenance, or as an assurance of agent ethics. Agent perspectives on this consumer interest support the notion that some buyers over-claim their interest in provenance in terms of their actual purchase behaviour, perhaps reflecting the influence of social desirability bias (Bruner & King 2000).

Across both samples, buyers expressed uncertainty about agent claims of ethical dealing and, as noted in the literature (Ariely 2008; Bolton, Warlop & Alba 2003; Butler 2000; Monroe 1973), pricing disparities and variations in product quality (Zeithaml 1988) compound this issue. As noted by Butler (2000, p.357), “Where quality and excellence are not clear…questions of value and pricing become more complex”. The theory that consumers have a tendency to assume the worst (Johnson & Levin 1985), inferring negative attributes as substitutes for missing product information (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982; Sharp & Romaniuk 2004), was evident in these results. The majority of buyers were either unaware of the Indigenous Art Code’s existence or, if they were aware, did not utilise it when making purchase choices. This finding suggests that either consumers are not trying hard to seek out information available to them (Sharp & Romaniuk 2004), or that this industry attempt to assist buyers when making purchase choices has so far been ineffective.

Contributions

This thesis makes empirical contributions to academic literature in the fields of marketing and arts management, and to the Aboriginal and Torres Strait Islander art sector. By identifying the profiles, purchase characteristics and criteria used by consumers to make purchase choices in this market, it has tested existing consumer choice theories and extended them into a new product market. Further, given that prior to this thesis the only existing research into buyer behaviour in this market analysed secondary market data (Coate 2009; Lim, Tressler & Webber 2008; Taylor & Coleman 2011; Wilson-Anastasios 2009) or generalist audience attendance surveys at art events (Young & Collins 2011), it contributes hitherto unavailable baseline data on primary market buyers that will allow artists, Art Centres and agents to develop their offerings in a competitive marketplace.

By creating new knowledge regarding consumer perceptions of a range of industry issues, this thesis contributes significant findings that will assist decision-makers in understanding how existing policies and industry norms are being understood and utilised in the marketplace. Until now this information did not exist, and by creating it this thesis provides a descriptive base from which future research can be developed, with the aim of contributing to a more resilient Aboriginal and Torres Strait Islander art sector. Findings can be generalised to buyer behaviour in other art markets, ‘luxury’ or non-essential aesthetic product markets and markets where supply chains are hidden.

Limitations

As is discussed more fully in Chapter Seven of this thesis, intentions and attitudes do not correlate highly with actual behaviours (Ajzen & Fishbein 1977; Auger & Devinney 2007; Carrigan & Attalla 2001; Carrigan, Szmigin & Wright 2004; Carrington, Neville & Whitwell 2010; De Pelsmacker, Janssens & Mielants 2005; Devinney et al. 2010; Sharp 1997, 2010; Vermeir & Verbeke 2006; Wright & Klÿn 1998), and 'social desirability bias' can be prevalent within respondent self-report data (Bruner & King 2000; Davies, Lee & Ahonkhai 2012; Ewert & Galloway 2009). These issues, as well as some inherent sample biases, have been considered in the design of this thesis' method and data collection instruments, and in the analysis of findings, and it is recognised that future research utilising observed behaviour data would be a valuable next step in understanding buyer behaviour in this market.

Thesis overview

This thesis is divided into seven chapters:

Chapter One: Introduction

As you now know, this chapter introduces and defines the topic, introduces the research problem and key research questions, describes the methods employed, the key findings from the research and its contributions and limitations.

Chapter Two: Literature review

This chapter reviews existing academic literature from the fields of marketing, sociology, anthropology and art history, as well as relevant industry literature and policy documents. It synthesises this literature and in doing so explains how the key research questions were generated.

Chapter Three: Research design

This chapter describes the two-tiered, mixed methods research design employed to address the three key research questions. It then describes the quantitative and qualitative sampling frames, the design and implementation of data collection instruments and methods of analysis employed. Finally, it addresses methodological issues relevant to that design.

Chapter Four: Consumer profiles and purchase characteristics (RQ1)

This chapter presents and discusses the results from both the quantitative and qualitative studies, as relevant to the first key research question.

Chapter Five: Criteria used to evaluate purchases (RQ2)

This chapter presents and discusses the results from both the quantitative and qualitative studies, as relevant to the second key research question.

Chapter Six: Awareness and perceptions of artwork provenance, available consumer information and industry regulation (RQ3)

This chapter presents and discusses the results from both the quantitative and qualitative studies, as relevant to the third and final key research question.

Chapter Seven: Contributions, limitations and implications for future research

This chapter describes in detail the contributions and limitations of this thesis, and implications for future research. It ends with a summary of findings.

Chapter summary

This chapter has introduced and defined the topic that will be addressed through this thesis, and described the industry context and research scope. It then outlined the research problem, introducing the key research questions through which that problem will be addressed. The methodology devised to address the key research questions was then explained and the key findings from each were presented. The contributions and limitations of the thesis were then outlined. The chapter concluded by providing an overview of the remaining thesis chapters.

Chapter Two: Literature review

This chapter reviews existing research relevant to this thesis. Due to its cross-disciplinary nature a variety of disciplines have been consulted, drawing together literature from the fields of arts management, marketing, art history, sociology, as well as relevant government policy. The review begins by describing the historical development of the Aboriginal and Torres Strait Islander art market and current issues. It goes on to review relevant marketing literature on buyer behaviour, in order to develop a framework for understanding consumer choice in this market. The review concludes with an examination of industry publications and academic literature on artwork provenance, relevant industry regulation and information provision.

The Aboriginal & Torres Strait Islander art market

Historical, infrastructure and supply chain context

Aboriginal and Torres Strait Islander art has existed for millennia, but until the mid-twentieth century was viewed as ethnographic curiosity (Caruana 2003, p.7), of primary interest to anthropologists. This perception began to shift in the 1950s, alongside wider social change in Australia (Acker, Stefanoff & Woodhead 2012, p.4). Aboriginal Art Centres have operated in some instances since the 1940s (Healy 2006). The establishment of the Aboriginal Arts Board in 1973 enabled government support for the development of Art Centres. "The professionalisation of mediation between artists and the market was underway" (Altman 2007b, p.45). In the late 1970s and 1980s Aboriginal and Torres Strait Islander art was derided by those who saw its assimilation into the sphere of contemporary art as the loss of "symbolic meaning fundamental to Aboriginal art… What we get in its place may look superficially the same but be, in fact, meaningless decoration" (Sturgeon 1982, p.160). Conversely, McLean has described "the long-term blindness of the art world" in denying Aboriginal art its place in the canon of 'fine art' as "blinkered Eurocentricism" (McLean 2011, p.25). By Australia's Bicentenary in 1988, 'Aboriginality' was firmly imprinted on the nation's cultural identity (Myers 2002) and the commercial market for Aboriginal art was growing in strength.

In 1989 *The Aboriginal Arts and Crafts Industry: Report of the Review Committee* (The Altman Review) was published, resulting in a policy shift wherein support for Aboriginal and Torres Strait Islander visual art became the responsibility of the Aboriginal and Torres Strait Islander Commission

(ATSIC)[17]. The Art Centre model remains the dominant structure in the supply chain linking producers to consumers, though this is shifting (Eccles 2008; Strickland 2012) as more artists seek alternative distribution channels, such as independent dealers. As Altman et al (2002) describe, the role of government in the sector remains “ambiguous and unresolved” and it is “unclear whether it is based on the rationale of ‘infant industry’ or ‘market failure’ (or both)” (Altman et al. 2002, pp.2-3).

Scope and scale of the sector

A number of government-commissioned analyses of the Aboriginal and Torres Strait Islander art sector have estimated of the value of the sector – summarised on the next page[18].

[17] It has been argued that government-funded Art Centres are antithetical to the concept of a free market economy (Altman et al. 2002). Perspectives on the core functions of Art Centres vary, with economic independence from government subsidies seen as a penultimate goal by some (Commonwealth of Australia 2007), and sustainable community development within a cross-cultural context seen as their key function by others (Wong 2005, p.9).

[18] The Altman Review estimated total sales of Aboriginal and Torres Strait Islander art at $18.5 million (Morphy 2008; Stolte 2012; Wright & Morphy 2000), whilst admitting that there was a “total absence of industry statistics” (Altman 1989) to enable an accurate assessment. In 1999-2000 an Australian Bureau of Statistics report estimated the total worth of Aboriginal and Torres Strait Islander art sales through commercial galleries at $35.6 million (Altman 1989, p.12), whilst a couple of years later Altman, Hunter, Ward and Wright (Commonwealth of Australia 2001, p.3) suggested that this may be a conservative estimate, and that the total value at that time was more likely to be between $100 million and $300 million (2002) p. 67). In 2002 The Myer Report estimated the value of total sales generated through the Aboriginal and Torres Strait Islander art market at approximately $200 million (Altman et al. 2002), whilst a prominent commercial gallerist put forward $500 million as a value (Myer 2002, p.165).

Year	Source	Estimated Value
1981	Pascoe	$2.5 million
1989	Altman	$18.5 million
1996-97	Australian Bureau of Statistics	$15 million*
2001	Australian Bureau of Statistics	$35.6 million*
2002	Myer	$200 million
2002	Cultural Ministers Council	$100-120 million
2002	Altman et al.	$100-300 million
*Sales at commercial galleries only, estimated in 1996-97 to represent approximately one quarter of the total market.		

Table 1: Estimations of the value of the Aboriginal and Torres Strait Islander art market (Commonwealth of Australia 2007)

These divergent estimates demonstrate a lack of reliable data on the industry's scope and scale. They also demonstrate the significant economic value of the sector, even if the true value is unknown. The Commonwealth Government's 2007 Senate inquiry, *Securing the future: Australia's Indigenous visual arts and crafts sector,* concluded that historical estimates of the industry's value and the 89 submissions made to the inquiry by industry stakeholders gave the Committee "some idea of the scale of the sector" (Commonwealth of Australia 2007, p.14), though certainly difficulty estimating the value of a market is not specific to this one (Bamberger 2011; Baumol 1986). However, as the Senate Inquiry noted, it is increasingly difficult to assess the scope of the Aboriginal and Torres Strait Islander art market due to increases in internet sales, the increasing number of businesses competing in a complex market and the large number of sales (paid for in cash or in-kind) transacted by artists independently of galleries or Art Centres, particularly around Alice Springs[19] (Commonwealth of Australia 2007, p.14). The Senate Inquiry made a range of recommendations, including increased funding for Art Centres and the introduction of a voluntary industry code of conduct and resale royalty scheme (Commonwealth of Australia 2007; Oster 2009). Both these regulatory measures have since been implemented, despite resistance from many in the sector (Rothwell 2009; Snow 2011; Stefanoff 2012; Wilson 2010b, 2011), and are discussed in further detail later in this literature review.

The secondary auction market

The few studies that do exist on buyer behaviour in the Aboriginal and Torres Strait Islander art market examine secondary auction markets (Coate 2009; Lim, Tressler & Webber 2008; Wilson-Anastasios 2009, 2011) and the investment potential of Aboriginal and Torres Strait Islander art (Taylor & Coleman 2011). Wilson-Anastasios (2009) suggests that major Australian auction houses exert significant control over buyer behaviour and price formation, especially 'top-tier' auction houses. She found that buyers "tend to believe that prices are validated by the actions of competing bidders" and, with relevance to this thesis, that for "buyers who are uncertain of their own ability to discern 'good' art from 'bad' art, the apparently impartial affirmation provided by the competitive process of price-setting at auction is taken as an indicator of quality" (Wilson-Anastasios 2009, p.6). This is supported by Velthuis (2003), whose study on price formation in commercial galleries in Amsterdam and New York found that art buyers tend to interpret price as an "unambiguous indicator of artistic value".

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[19] Whilst this is true of all art markets, the situation is more marked for Aboriginal and Torres Strait Islander artists, for whom transacting outside of legitimised commercial outlets brings with it issues of unfair treatment due to inequitable power relations and language barriers.

Whilst this thesis is not concerned with the secondary market, these studies offer insight into the influence of pricing upon consumer perceptions of quality (Ariely 2008; Lockshin & Rhodus 1993; Richardson, Dick & Jain 1994; Steenkamp 1989; Teas & Agarwal 2000; Zeithaml 1988), an issue of relevance to this thesis. Lim, Tressler and Webber (2008) looked at determinants of price in the context of Sotheby's Aboriginal art auctions, finding, among other things, that some buyers preferred 'average sized' paintings over very large ones, as they are more versatile and easier to find space for within one's home. These sorts of pragmatic considerations are important in considering buyer behaviour in this, or any other art market.

Art market issues

Market health

'The art market' is not a fixed, static entity, defined by a single, undifferentiated product (De Marchi & Van Miegroet 1994) and similarly the 'market value' of an artwork is relative. "There is no intrinsic, objective value [to artworks] (no more than that of a hundred-dollar bill)" (Findlay 2012). Once an artwork passes from the hands of the first buyer, its market value is largely determined by supply and demand principles (Findlay 2012). However, the work of most lower and middle market artists never makes it to the secondary market, where market value is traditionally set (Boys 2013). Thus, assessing a product's market value in these price tiers can be a largely subjective process.

The commercial markets (both primary and secondary) for Aboriginal and Torres Strait Islander art have grown exponentially over the last 20 years, reaching a peak in 2007 (Commonwealth of Australia 2012) – the secondary market sale of a work by Clifford Possum Tjapaltjarri in July 2007 for AUD$2,400,000 is emblematic of that peak (Albrecht 2012). Broadly speaking, in the art world the health of one market (primary or secondary) affects the health of the other – “collectors are less likely to spend significant amounts of money on an artist’s work [in the primary market] if he or she does not have an established auction market” (Wilson-Anastasios 2009, p.2), and vice versa. Furthermore, the health of both are at the mercy of global financial markets, and in recent years the domestic market for Aboriginal and Torres Strait Islander art has contracted significantly, with the Australian Bureau of Statistics in 2012 reporting a 52% reduction in sales through remote Art Centres since 2007 (Commonwealth of Australia 2012, p.2). Sales in the secondary market have also declined significantly (Newstead 2011; Wilson 2010a), both domestically and internationally – auction house Sotheby’s once attributed 50 - 70% of their sales (by value) of Aboriginal and Torres Strait Islander art to overseas buyers (Gennochio 2008, p.10). Anecdotal evidence from metropolitan commercial galleries, auction houses and private dealers echoes this, with a number of commercial galleries having closed their doors permanently in recent times[20]. Whilst according to media reports this decline has been felt across the Australian art market (Buck 2012; Frost 2013; Main 2012), many argue the Aboriginal and Torres Strait Islander art market has been “the hardest hit of all” (Lacey 2011) due to “economic uncertainty, insecurity in the market, over production, lack of quality, high prices and too much negative press” (Woodhead 2013). A perception exists that much Aboriginal art is mediocre[21] and that an over-supply of mediocre work is contributing to a “glut”. This over-supply has contributed to a lack of demand (Boland 2011a) and perhaps an erosion of confidence for some consumers of Aboriginal and Torres Strait Islander art. Some even say the Aboriginal art

[20] The AEP *Value Chain Survey* was distributed to over 260 private art businesses (galleries and other agents). Follow up phone calls to those who did not respond revealed that 50 of the 260 had ceasing trading (Woodhead 2013).

[21] For example, one industry commentator has said: "Aboriginal art is like every other art form – there's a few good artists and a lot of mediocre ones" (McDonald, in Lacey 2011).

movement is “unsustainable and will fade as the last of the ‘true’ desert artists dies” (Coslovich 2011)[22].

Supply chain fragility

Sociologists and anthropologists have discussed the complex systems of production and consumption within which artworks circulate. Becker (1982) examines how “art is socially produced…as a collective action involving artists, art suppliers, dealers, curators, critics and consumers” (Acker, Stefanoff & Woodhead 2012, p.16). Anthropologists have described the ‘fields of cultural production’ (Bourdieu 1984; Myers 2002, 2004, 2006) in which art objects circulate, and the differing (often oppositional) ‘regimes of value’[23] (Appadurai 1986) into which Aboriginal and Torres Strait Islander art is propelled when it enters the fine art market.

As previously mentioned, there are now multiple consumption channels available to a buyer of Aboriginal or Torres Strait Islander art. Whilst agents are traditionally the mediators between artists, Art Centres and the market, Art Centres today have their own marketing strategies and relationships with consumers, “often opt[ing] to bypass galleries and stage their own city shows”, usurping the role of private galleries, “many of which are reconsidering their place in the market they helped pioneer” (Rothwell 2009). A somewhat frightening array of Aboriginal and ‘Aboriginal-inspired’ art products can be found online, anywhere from eBay to top tier auction

[22] This perception is based upon the fact that the majority of renowned Aboriginal artists are elderly. Some industry commentators have concerns that as these elderly artists pass away, younger artists are not taking their place.

[23] Whilst there is not scope to discuss in detail Aboriginal and Torres Strait Islander value systems within this thesis, non-Indigenous conceptions of economic value must be understood by artists, especially in terms of what makes them valuable, or at least saleable, in the commercial market (Myers 2002).

houses[24]. Governments fund annual art fairs, often restricted to Art Centres and, “buyers with ethical sensitivities increasingly choose art centre-sourced work…marketed as untainted” (Rothwell 2009). Dichotomous perceptions of commercial agents and Art Centres are not helpful in building a resilient supply chain, do not recognise the role many commercial agents play as supporters of artists and educators of consumers and contribute to consumer perceptions of commercial agents as “middle men” (pers. comm. with buyers and agents interviewed for this thesis). However, certainly Aboriginal and Torres Strait Islander art has created significant wealth for collector-investors (Oster 2009) and some commercial agents, and these benefits have not equally flowed back to artists (Acker, Stefanoff & Woodhead 2012). It is partly this disproportionate distribution of profits that has contributed to a “jaundiced view of the dealers in Aboriginal art even when they have operated respectably” (Oster 2009, p.71)[25], and a fractured supply chain.

Provenance

In the Aboriginal and Torres Strait Islander art market, provenance simultaneously demonstrates the source, history of ownership and authenticity of an artwork (Circuitt 2008), often also providing documentation of the subject matter or story depicted. Provenance documentation can also assure a buyer of an artwork’s resale value, or the circumstances under which

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[24] Some argue that the ubiquitous nature of online shopping has reduced consumer sensitivity to the intangible nature of buying online – where products cannot be touched or viewed at their actual size – but that art galleries have been reluctant to adopt new technologies (Smith, Discenza & Baker 2006). While this thesis was being written, Amazon.com launched Amazon Art, its own online fine art-selling site. It caused some ripples in the media (Art Media Agency 2013; Merz 2013; Rahm 2013), and it was noted by commentators that buyers “want to see the condition of the painting, feel what they’re buying, see that the provenance is correct and that the person selling is authorised to do so” (Merz 2013). Such comments reiterate the findings of Quesenberry and Sykes (2008) and Smith, Discenza and Baker (2006), whose studies found that people are reluctant to purchase art without having seen it in the flesh. Consumer uptake of online purchasing is investigated through this thesis.

[25] Whilst this is likely to be true in art markets across the world, the disparity in wealth, education and living standards between Indigenous and non-Indigenous Australians makes this inequity of profit all the more stark.

it was produced. Whilst provenance is not in itself evidence of ethical production, certain provenances (such as Art Centre provenance) have come to be understood as representative of ethical standards (Australian Art Collector 2010; Circuitt 2008), though this is hotly contested in industry circles, as the following discussion will demonstrate.

Provenance can be demonstrated through a range of documentation – from Art Centre or gallery produced certificates of authenticity to visual documentation (film or photographs) of the artwork being painted. Whilst many perceive Art Centre provenance as the 'gold standard', citing the principles of Aboriginal governance, cultural maintenance, art form development and maximised economic returns to artists as factors (Stefanoff 2012), there are prominent detractors of the 'Art Centre system', who view it as paternalistic, over-regulatory and responsible for the institutionalisation of Aboriginal art (Rothwell 2006; Rothwell 2010; Rothwell 2012a, 2012b, 2012c). Certainly many artists work outside of Art Centres – it is estimated that up to 50% of paintings are produced by artists working independently (Acker, Stefanoff & Woodhead 2012). These artists may be at a disadvantage in a market climate that ultimately discriminates against non-Art Centre produced works (Acker, Stefanoff & Woodhead 2012). As prominent gallery owner Adrian Newstead has said:

> *By insinuating that the provenance of independently produced works is unsafe, they* [staunch Art Centre supporters] *undermine more than 50% of the art currently being produced…creat*[ing] *prejudice toward…individuals who support artists through the sale of their works. In promoting this narrow interpretation of safe provenance and ethics, they exploit white guilt…*[and]*…collectors who have bought perfectly good works for which artists have been fairly remunerated are compromised, and their collections are devalued* (Newstead 2009).

The difficulty for the buyer is in knowing 'good' provenance from 'bad'. Many commercial agents sell works on behalf of Art Centres, or on behalf of artists who do not work through Art Centres, and this certainly “does not necessarily mean that it’s unethically sourced” (Australian Art Collector 2010). However, a buyer will have difficulty understanding these nuances without informing themselves prior to the point of purchase – “the onus is on you to do your research” (Australian Art Collector 2010). Works sold without good provenance may prove difficult to re-sell at a reputable auction house (Australian Art Collector 2010). This is obviously relevant to high-end buyers of any art, including Aboriginal and Torres Strait Islander art. What is not known, and will be investigated in this thesis, is whether provenance is also important to lower and middle market buyers.

Understanding the art consumption context

Aesthetic taste and hedonic consumption

Inherently connected to ideas of beauty, style and taste, aesthetics are closely aligned with the fine arts and design (Wagner 1998). Art objects are aesthetic objects, deriving their beauty from an enigmatic use of the elements of design – colour, line, shape, space, etc. (Frondizi, in Wagner 1998)[26]. The word aesthetics is derived from the Greek "aisthetikos", meaning "pertaining to sense perception" (Veryzer 1993). An aesthetic response can be defined as a "deeply felt experience that is enjoyed purely for its own sake without regard for other more practical considerations" (Holbrook & Zirlin 1985, p.21). An 'aesthetic attitude', involving the ability or desire to contemplate and appreciate, has been described as necessary for an aesthetic experience to take place (Kainz 1962; Wagner 1998)[27].

It is widely accepted that in aesthetic product markets, taste plays an integral role in judgment and decision-making (Bloch 1995; Bourdieu 1984; Hoyer & Stokburger-Sauer 2012; Schindler, Holbrook & Greenleaf 1989). Perspectives on the origins of aesthetic taste vary greatly. Bloch (1995, p.22) has stated that individuals with a sense of aesthetics have "more sophisticated preferences regarding the design of things", and that this is at least partially innate (Bloch 1995)[28]. Conversely, Bourdieu (1984) has described taste as

[26] In relation to Aboriginal and Torres Strait Islander art, it has been argued that aesthetic appreciation can be seen as akin to "cultural domination"; an insensitive and Eurocentric application of non-Indigenous values upon artworks that were created according to entirely different standards and values (Coleman 2004, p.237). This is worthy of more discussion than can occur here, but in brief Coleman refers to the systems of ancestral knowledge and law often contained within remote area Aboriginal and Torres Strait Islander art.
[27] The concepts of taste and aesthetics have been extensively researched within the fields of sociology, psychology and philosophy, (see Adorno 1997; Bourdieu 1984; Danto 1964; Kant 1790).
[28] Whilst outside the scope of this thesis, a range of theoretical perspectives supports this argument, including Gestalt theory, teleology and neuroscience (see Bloch 1995).

part of an individual's cultural capital; something that is acquired through expertise in a particular field.

A number of analogous definitions of hedonic, or aesthetic, products and experiences exist (Hirschman 1983; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Wertenbroch & Dhar 2000), and the two terms ('aesthetic' and 'hedonic') are used interchangeably. One definition characterises hedonic or aesthetic production as that which is "expressed or experienced purely for its own sake" (Holbrook & Zirlin 1985, p.13). A number of authors have discussed the differences between utilitarian and hedonic products in evaluating consumer decision-making (Hirschman & Holbrook 1982; Townsend & Sood 2012; Wertenbroch & Dhar 2000). Some (Hirschman 1983; Hirschman & Holbrook 1982; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Wertenbroch & Dhar 2000; Wiedmann, Hennigs & Siebels 2009) argue that hedonic products are subjectively evaluated based on a range of intrinsic, holistic or intangible factors, such as the overall 'look' or aesthetic style of the object. Davies (2006), conversely, has argued against the intrinsic value of hedonic products like art, positing that art (especially that of non-Western cultures) certainly has extrinsic functionality, and can be evaluated thus[29]. Despite a lack of consensus, it seems logical that art products are evaluated according to aesthetic criteria, and that these criteria may hold more or less value for different consumers, in relation to other product attributes (Johnson 1974).

[29] This is important in considering consumer demand for Aboriginal and Torres Strait Islander art from a cross-cultural perspective, which, whilst outside the scope of this thesis, would be worthy of future research.

Who buys art?

As Wiedmann, Hennigs and Siebels (2009) have noted, marketing strategies must first “identify and profile consumer segments” in order to understand why people buy what they buy. Buying art is often thought to be a profitable activity (Frey & Pommerehne 1989), and it is often assumed that art buyers are interested in investment (Battersby 2010). At the high end of the fine art market, this has certainly been the case, and up until the domestic market’s downturn in 2007-08, Aboriginal art was an attractive option for art investors (Taylor & Coleman 2011). However, not all collectors are investors – traditional definitions of art consumption describe collecting as the passionate and selective acquisition of a certain ‘set’ of things over a period of time (Belk 1995, pp.66-67). Herrmann (1972, p.22) distinguishes between the “dabbler” and the “genuine collector”, stating that “the latter has stilled once and for all any inhibition against spending money on the inanimate objects of his choice.” Further, an individual’s motives in acquiring art could be anything from a desire for home decoration through to desire for financial assets (Throsby 1994). Tourists may purchase art as a memento, often inexpensive, portable objects they can take home with them (Nelson 1982). As previously noted, the middle market is difficult to define (Burns 2013), and until recently, little evidence-based research existed on the demographics and behaviours of these buyers, particularly in primary markets[30].

Whilst data collection for this thesis was being conducted, members of the Aboriginal and Torres Strait Islander Art Economies Project were also completing a national survey of sellers of Aboriginal and Torres Strait Islander

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30 A 2010 report on ‘arts participation’ (Australia Council for the Arts 2010) divided participation into either ‘creative’ or ‘receptive’, and did not discuss consumption at all. An updated study was released in 2013, this time encompassing consumption (Australia Council for the Arts 2013). However, data referenced was from a 2009-10 ABS survey and related to service as well as product consumption (Australian Bureau of Statistics 2011), and is therefore not directly comparable.

art[31]. Results from this survey show that 76% of respondents identified Australian residents as their core customer base, and nearly 50% of those were private buyers (as opposed to collectors, who accounted for 18%) (Woodhead 2013). International private buyers were reported as the next largest group (13%), with North America and France being the largest markets – respondents expected customers from these countries to maintain market share (Woodhead 2013). These statistics indicate that buyers of Aboriginal and Torres Strait Islander art are predominantly Australian, and are not considered ‘collectors’, reinforcing this thesis’ lower and middle market sampling frame. There has historically been some ambivalence in the international reception of Aboriginal art and, writing in 2011, McLean (2011) felt that Aboriginal art was yet to be accepted overseas as contemporary art. This will be explored through this thesis’ first research question.

Examining luxury, to understand art consumption

An obvious link exists between luxury and art products, insofar as they are both non-essential, often hedonic product categories. However, they are not interchangeable, and authors have acknowledged the slippery nature of their respective definitions (Dubois & Laurent 1994; Heine & Phan 2011; Lagier & Godey 2007). Despite their differences, there are sufficient similarities to enable inferences to be drawn from luxury product consumption to support this discussion of Aboriginal and Torres Strait Islander art consumption.

Heine (2010, p.3) defines luxury products (or brands) as those that are regarded by consumers as “compris[ing] of associations with a high price, quality, aesthetic, rarity and specialty”. Dobrian (2006) describes luxury products as “non-essential but satisfying”. Vigneron and Johnson (1999) use

[31] This data was not available at the commencement of this study (and therefore could not be considered in developing the research questions), but it can now be included in the literature review.

the term ‘prestige’ to measure a product’s level of luxury, arguing that prestige infers superior quality and social value, as well as uniqueness. These definitions could be applied to art products, especially at in the top tiers of the market, but also in middle price tiers to some extent. Lagier and Godey (2007) define luxury products as distinct from art products, arguing that the former are reproducible, associable and functional (such as a designer handbags or expensive cars)[32], whereas art objects are entirely unique and serve no utilitarian purpose.

Luxury and art products do have in common the pleasure and satisfaction they offer individuals through their purchase (Lagier & Godey 2007, p.41), and their non-essential nature. The criteria of involvement, limited supply and the recognition of value by others are, as cited by Wiedmann, Hennigs and Siebels (2009, p.626), key components of luxury products, criteria that can also apply to art products. Wiedmann, Hennigs and Siebels (2009), drawing upon the work of Vigneron and Johnson (2004), developed a framework for understanding consumer motives and perceptions of value regarding the consumption of luxury goods. They defined luxury brand value as financial, functional, individual, and social (Wiedmann, Hennigs & Siebels 2007, 2009), each of which has relevance to art consumption.

The myth of the ethical consumer?

A number of analogous terms are used within the marketing literature to describe ‘ethical consumers’. Not all, however, define such consumers by their actual behaviours; many utilise a combination of attitudinal and intention-based measures to define ethical consumption (Anderson and Cunningham

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[32] This definition correlates with the luxury product categories provided by Euromonitor International (2011), which includes designer clothing and footwear, luxury accessories, luxury jewellery and timepieces, fine wines/champagne and spirits and luxury electronic gadgets, among others. Non-reproducible products, such as artworks, are notably missing from this list.

1972, Chitra 2008, Samdahl and Robertson 1989). Freestone and McGoldrick (2008) adopt Cowe and Williams' (2000) definition of an ethical consumer as someone whose consumption choices reflect "matters of conscience such as animal welfare and fair trade, social aspects such as labour standards". Carrington, Neville and Whitwell (2010) describe ethical consumers as consumers who feel a responsibility towards the environment and / or society and who express those values through their consumption behaviours. These definitions use behaviour as the measure of ethical consumption, which is important given the gap between attitudes and behaviours can be marked (Ajzen & Fishbein 1977; Auger & Devinney 2007; Sharp 1997).

Whilst it is widely believed that consumers generally are becoming more engaged with ethical issues surrounding their purchase choices (Carrigan & Attalla 2001; Davies, Lee & Ahonkhai 2012; Shaw & Shiu 2003), there is also substantial research to suggest that "survey radicals turn into economic conservatives at the checkout" (Devinney et al. 2010). According to Carrington, Neville and Whitwell (2010) despite the best intentions, consumers often do not purchase ethically sourced or produced products. Attempts to explain this dissonance have focused on the limitations of self-report data, with the 'social desirability bias' causing a distortion of the reality of consumer intentions and behaviours (Auger & Devinney 2007). Bruner and King (2000, p.80) define social desirability as "the pervasive tendency of individuals to present themselves in the most favourable manner relative to prevailing social norms".

In a study on home decoration in Australia, one respondent said (in relation to the Aboriginal art she owned): "I buy Aboriginal art because I'm committed to supporting Aboriginal artists" (Woodward 2003). It is not known whether ethical considerations are of concern to buyers in the lower and middle primary markets for Aboriginal and Torres Strait Islander art. They may not be aware of relevant ethical issues, these issues may not be important to them (Davies, Lee & Ahonkhai 2012) or they may find other attributes more important (Johnson 1974). Further, despite any professed ethical proclivities, buyers may not uphold their intentions at the point of purchase. These issues will be investigated in this thesis, particularly in relation to the importance of artwork provenance to purchase choices.

Brand repertoires and consumer loyalty

“The diversity of the contemporary [Aboriginal art] industry means art comes to market by many channels” (Acker 2008). Further, in the Aboriginal and Torres Strait Islander art market there are often multiple agents selling works of similar quality, by the same artist, for very different prices (see Eccles 2012). There is scant literature on the implications of this proliferation on consumer attitudes and perceptions, but it is reasonable to assume that it may cause some confusion for the uninitiated. This section references marketing literature on consumer brand loyalty in order to understand whether this theory holds in relation to the art market.

Marketing literature has established that consumers have a small but established repertoire of brands they habitually purchase and that they are polygamous in their loyalty to those brands (Ehrenberg, Uncles & Hammond 1995; Sharp 2010). However, “the choice of brand is trivial compared to the decision of whether or not to purchase from the category” (Sharp 2010, p.101), and arguably the vast majority of consumers – perhaps despite what they say – exhibit only “prosaic, uncommitted loyalty” (Sharp 2010, p.102). Further, “loyalty is divided and strongly driven by opportunity” (Sharp 2010, p.98). Empirical research also tells us that purchase behaviour contributes to the formation of attitudes towards a product or brand (Sharp 1997, 2010; Wright & Klÿn 1998). Furthermore, evidence (Sharp 2010) suggests that attitudes towards a brand or product are not static, and that attitudes are weak indicators of future purchase behaviour (Sharp 1997; Wright & Klÿn 1998). Therefore, purchase choice is often based on convenience, rather than any conscious brand loyalty. It is possible to apply the construct of brand repertoires and loyalty to the Aboriginal and Torres Strait Islander art market. Extending the analogy, agents (both commercial sellers and Art Centres) take the place of brands. Framing agents in this way may enable fruitful parallels to emerge. For example, reliance upon brands in order to reduce purchase complexity and risk (Crozier & McLean 1997), as self-affirming indicators of one's own judgment, status or expertise (Belk 1988; Davies, Lee & Ahonkhai 2012; Townsend & Sood 2012; Vigneron & Johnson 1999). This thesis will investigate whether consumers display loyalty to particular agents or agent types. Understanding consumer purchase preferences in relation to agents will enable greater understanding of how consumers perceive different actors in the supply chain, which in turn has the potential to increase the sector's ability to educate buyers about those actors and their place within that supply chain.

Understanding consumer choice

The previous section explained that a gap exists between consumer attitudes and behaviours (Auger & Devinney 2007; Sharp 2010; Wright & Klÿn 1998) and that attitudes are weak indicators of future purchase behaviour (Sharp 1997). However, where the analysis of actual (or observed) purchase behaviour is not possible[33], post-purchase evaluation can also be useful, given it has important implications for future purchase patterns (Foxall 2005). Further, as Lockshin and Hall (2003, p.2) explained in relation to wine consumption:

> *If we can understand how consumers choose wine, then we have a much better framework to decide pricing, packaging, distribution, advertising, and merchandising strategies. These strategies then set the agenda for further development in the related areas of supply chain management, sales management, and even export management.*

This justification for the study of consumer choice is easily extrapolated to the Aboriginal and Torres Strait Islander art market, especially in light of the supply chain fragility discussed in Chapter One.

Given the lack of literature on decision-making in the art market, literature on the wine market – a somewhat analogous consumption context – is reviewed in this section. Like the Aboriginal art market, the low and mid-priced wine market is one in which supply outstrips demand, taste is subjective and product quality highly variable (Charters & Pettigrew 2003)[34]. Batt and Dean (2000) have noted the intangibility of many 'quality dimensions' in wine, and Charters and Pettigrew (2003) consider wine to have a substantial aesthetic component, making it "a useful tool for investigating…the broader class of

[33] See Chapter Three for further discussion.

[34] Of course, the low and middle price tiers of the wine market are considerably lower than in the art market, meaning that in the context of buying art, we would expect consumer involvement levels to be higher and perceptions of the risk associated with purchases (especially in terms of investment but also in relation to aesthetic appeal) stronger.

aesthetic goods" (2003, p.2). Further, the system of Appellations d'Origine Contrôlées (AOCs) in the wine market as indicators of provenance has considerable similarities with certificates of authenticity in the art market, with AOCs having been introduced to protect consumers from unscrupulous wine sellers (and to protect producers of good quality wines from the consumers' lack of ability to perceive quality in different products) (Teil 2010)[35].

Quality cues

Quality is a difficult term to define (Steenkamp 1989; Zeithaml 1988). In the context of consumer behaviour it is relevant to the purchase decision process (Charters & Pettigrew 2003; Zeithaml 1988). A substantial body of literature exists within the field of marketing on the cues consumers use to signal quality and to inform purchase decisions, predominantly focusing on consumer goods contexts (Hamlin 2010; Ismail & Barber 2008; Lockshin & Hall 2003; Richardson, Dick & Jain 1994; Teas & Agarwal 2000; Verbeke & Ward 2006; Yuan 2005; Zeithaml 1988). Hansen (2005) brought together a number of theories (Richardson, Dick & Jain 1994; Steenkamp 1989; Swinyard 1993), particularly 'value perspective', wherein consumers trade off various qualities (for example, price versus quality), when making purchase decisions (Johnson 1974), and 'cue utilisation theory', which "suggests that consumers may try to reduce risk by using cues (e.g. price, brand name, advertising, colour, etc.) as indicators of the quality of a product or service" (Hansen 2005, p.420; Richardson, Dick & Jain 1994; Steenkamp 1989).

[35] As wine production expanded beyond the traditional centres of Bordeaux, Champagne, etc., producers in new markets began labelling their products as 'Champagne', etc., taking the name as an indication of the grape and production process used, rather than as an indication of the geographic location in which it was produced. In order to stop these different and sometimes lower quality products devaluing the brands of producers from renowned French wine regions, AOCs were created to provide consumers with a series of 'signs of quality' to enable them to understand the difference between products, and to enable high quality producers to have their products recognised and correctly attributed (Teil 2010). This history has strong resonances with the introduction of provenance documentation in the Aboriginal and Torres Strait Islander art market, and with the development of the Indigenous Art Code, and is discussed in more detail in the final section of this chapter.

Cognitive dissonance – unease arising from the friction between opposing beliefs – can also be reduced by emphasising one belief over another when making purchase choices, or post-purchase (Foxall 2005). In relation to wine consumption, Lockshin and Hall (2003) note that consumers reduce risk by considering fewer options (see Foxall 1983). To extend this construct to the art consumption context, if a buyer finds an artwork aesthetically pleasing, but is unsure of its provenance, the visual appeal of the artwork may subsume their desire to know that the piece was sourced ethically. Indeed, they may not consider provenance at all.

Involvement and consumer choice

Consumer involvement can be defined as the perceived importance or relevance a buyer places upon a product or aspect of it, based on their needs, values and interests (Ismail & Barber 2008; Lockshin & Hall 2003; Yuan 2005). Consumer involvement has been defined as having temporal qualities; that is, involvement can be enduring (signifying long term commitment to, or enthusiasm for, a product category, such as Aboriginal art) (Richins & Bloch 1986) or situational (specific to a purchase decision) (Mittal 1989). Further, the literature varies in the weight it places upon involvement as a determinant of consumer choice, and marketers have historically over-emphasised involvement as a causal influence upon consumer choice (Sharp 2010). Certainly the idea of consumers having “deep attachments” (Sharp 2010, p.100) to everyday consumer goods – such as washing powders – appears far-fetched. However, in the hedonic consumption context of Aboriginal and Torres Strait Islander art, some level of enduring (product category) or situational (purchase decision) involvement holds greater currency (Mittal 1989), due to the fact that art purchases are usually one-off (or at least infrequent) and relatively costly.

Consumer involvement also has relevance in terms of provenance issues – consumers who dedicate significant resources to gaining knowledge about the art they purchase are arguably ‘highly involved’, whereas those who ‘casually’ purchase – intermittently and without investing significant resources – are more likely to be lowly involved. Thus, consumer involvement is relative to personal involvement with a product category (Ismail & Barber 2008).

Perceptions of price and quality

If quality cues, such as product price, influence consumer choice, then variations in product price (where the products are of similar quality, or vice versa) may reasonably have an effect upon consumer decision-making. The influence of these cues may vary depending upon the consumer’s awareness of differences in pricing in a particular product market, or their ability to perceive quality in the product (Zeithaml 1988). As Bolton, Warlop and Alba (2003) have noted, consumer price consciousness is shaped in part by perceptions of price fairness, which can be guided by a number of factors including past prices paid and the prices of competitors. Price fairness can be defined as the extent to which the “sacrifice and benefit are commensurate for each party involved”, though consumers may make assumptions and inferences about the costs and profits of sellers (Bolton, Warlop & Alba 2003). Thus, price perceptions may be subjective (Monroe 1973). Value, however, is the ratio of quality to price and,

> *Even high-priced products can be promoted as ‘good value’ as long as their price-quality relationship isn't out of line with competing offers. Similarly, lower quality products can also be great value as long as their price and quality are aligned* (Wong 2005, p.9).

Given the subjectivity of price perceptions and the delicate balance between price / quality ratios, it is no wonder there exists buyer-seller conflict, mistrust, and consumer dissatisfaction in various product markets with regards to pricing (Bolton, Warlop & Alba 2003).

Marked price variations exist in the Aboriginal art market, with seemingly similar artworks selling for divergent prices in different retail outlets. Price and quality perceptions are of obvious import here. As noted by Butler (2000, p.357), “Where quality can be assessed by broadly-agreed criteria, comparisons and decisions are straightforward. However, where quality and excellence are not clear…then questions of value and pricing become more complex”. A buyer’s willingness to pay a particular price for an artwork may be impeded if they were introduced to that artist’s work at a lower price – their ‘price anchor’ (the amount they perceive a work of that kind to be worth) will be set at the lower price, and anything higher will appear over-priced (Ariely 2008). The tendency for consumers to seek out discounts (Yeoman 2011) provides a further challenge for agents. Sellers of lower quality works engage in ‘price slashing’ in the Aboriginal art market, with clearance outlets regularly advertising in the mainstream press. The advertisement on the next page exemplifies the fact that “inherent information asymmetry between firms and consumers may prevent the public from making informed judgments across sellers; therefore, low quality providers may advertise and prosper” (Parker 1995).

Figure 4: Advertisement for an auction of Aboriginal and Torres Strait Islander artworks, demonstrating the 'clearance sale' approach some sellers take.

In other words, the uninformed consumer may be introduced to Aboriginal art at a sale such as the one advertised above, and without having the knowledge to perceive the lesser quality of the works for sale (Zeithaml 1988), may develop a price anchor for particular artists (or whole styles of work) that is actually below that artist’s market value. Therefore, pricing and resultant price perceptions have consequences for future price elasticity (Andreyeva, Long & Brownell 2010) for an artist’s work, and arguably for the sustainability of the commercial market more broadly. A poor match between quality and pricing has implications for the market as a whole. Where pricing fluctuates wildly, consumer mistrust is created with regards to the pricing practices of agents (Bolton, Warlop & Alba 2003) and the reputation of a whole group can be tarnished (Scott-Mundine 1990).

Artwork provenance, consumer information and industry regulation

Perceptions of artwork provenance

Industry literature suggests that some buyers have become wary of Aboriginal art's security, both as an investment (Albrecht 2012; Boland 2010, 2011b; Cole 2011; Taylor & Coleman 2011) and as an equitable way to transact Aboriginal and Torres Strait Islander culture (Rentschler & Bagaric 2004; Rothwell 2010), in light of 'horror stories' in the media about fake artworks, false attribution and unethical dealings with artists (Rothwell 2006, pers. comm. various agents, 2013). Proclamations of ethical dealing, watertight provenance and fair remuneration of artists (see Figure 5 on the next page), are central to the marketing strategies of many agents, suggesting they see provenance as important to at least some of their buyers[36].

[36] See these gallery websites for examples of agent descriptions of ethical dealing: http://www.idaia.com.au/en/about-idaia/vision/; http://www.taligallery.com.au/about-us/; http://www.mbantua.com.au/certificate-of-authenticity/; http://www.aboriginalartgalleries.com.au/Resources.cfm?Category=Code%20of%20Ethics

IDAIA'S COMMITMENT

IDAIA is committed to protecting and promoting ethical practices, fair for both the artists and the buyers, notably in regards to remote community Aboriginal art:

Sourcing and working only with and for the official Aboriginal art structures: the remote community, Aboriginal-owned art centres (artist cooperatives) spread across the country or equivalent ethical organisations acting as art centres as recognised by the Australian public museums.

IDAIA strives to educate about what is at stake in the artworks' selection process

IDAIA supports the official recommendations from the Senate Inquiry's Report on Australian Indigenous Art Sustainability published in 2007, and has been contributing to the Indigenous Australian Art Commercial Code of Conduct by submitting its comments on the draft and is a signatory of the Code.

INDIGENOUS ART CODE

Figure 5: Extract from the website of a seller of Aboriginal and Torres Strait Islander art, explaining their position on ethical dealing and the provenance of the art they sell. This figure also shows the Indigenous Art Code logo.

However, as discussed in Chapter One, it is not known whether lower and middle price tier buyers are interested in provenance, or if they are aware of it at all. Perceptions of provenance at the high end of the fine art market are a little clearer. Most buyers interested in reselling their art seek strong provenance, and this holds for high-end Aboriginal and Torres Strait Islander art purchases (Lawrence 2012). Artworks with dubious provenance records hold less value (Cole 2011; Taylor & Coleman 2011; Wilson-Anastasios 2009) and non-Art Centre works can be difficult to resell in a top tier secondary auction (Australian Art Collector 2010; International Development of Australian Indigenous Art 2013), though this is changing. Provenance, then, will likely be of interest to the small number of buyers purchasing at the very top end of the fine art market, whose purchases are made at least partially for investment.

It is possible that provenance is also important to lower and middle market buyers, but for different reasons. These buyers may have concerns about the fair remuneration and working conditions of artists[37]. Alternatively, they may seek a provenance documentation as a guarantee of 'authenticity', 'uniqueness' and 'Aboriginal meaning' (Myers 2002, p.158) given aforementioned attribution issues in the market. As former ACCC Chairman Graeme Samuel has stated: "Art consumers have the right to be confident that when purchasing Aboriginal art it will in fact be Aboriginal art" (Samuel, quoted in Gosford 2010).

Perceptions of supply chain actors

Understanding consumer perceptions of the quality of a supplier's offerings is central to the analysis of consumer behaviour (Ramsay, Wagner & Kelly 2013). As Awaysheh and Klassen (2010, p.1250) have identified, referencing Tapscott and Ticoll (2003), rapid dissemination of both positive and negative information about actors within supply chains is now possible due to advancements in technology, and buyers react when questionable behaviour is identified. As "societal expectations for acceptable practices and standards of conduct continue to evolve and ratchet upwards" and unethical practices are revealed through the popular press and regulation (Awaysheh & Klassen 2010, p.1248), consumers have the ability to place pressure on suppliers and retailers to uphold standards (for example, ethical treatment of workers). Furthermore, the implementation of industry-specific codes of conduct (CoCs) dictating standards of behaviour for sellers and purchase criteria for buyers (Mamic 2005) can be used as leverage to encourage behaviour change in

[37] This is particularly pertinent for Aboriginal and Torres Strait Islander artists whose "educational, enterprise and employment opportunities are extremely limited" (Albrecht 2012) and who can therefore be susceptible to inequitable relationships and transactions with agents.

both buyers and sellers (Awaysheh & Klassen 2010). Codes of conduct are discussed in more detail later in this section.

Supply chain transparency, or the extent to which information is readily available to end-users and others within a supply chain, has also become increasingly important in relation to issues such as the origins of commodities (i.e. provenance) and product safety (Lee 2002; van Der Zee and van Der Vorst 2005 in Awaysheh & Klassen 2010). The geographic, cultural and organisational distance between suppliers (in the context of this thesis, artists), firms (agents) and buyers have implications for supply chain transparency (Awaysheh & Klassen 2010) [38]. Whilst a comprehensive discussion of these conceptual frameworks is not possible here, the idea of distance between supply chain actors resulting in a lack of transparency and possible misperceptions has considerable resonances with the Aboriginal and Torres Strait Islander art market. Buyer (and to a lesser extent agent) perspectives on a range of issues affecting the art supply chain[39] are explored throughout this thesis.

Information provision and seller reputation

Commercial gallery owner Vivien Anderson has stated that in general Australians are "reluctant to ask the difficult questions about the conditions in which [Aboriginal and Torres Strait Islander art] works were produced" (Rentschler & Bagaric 2004, p.1), suggesting that consumers display minimal agency in ascertaining product or provenance information. Belk and Groves (1999, p.28) found that the questions asked of agents "did not probe beyond

[38] Geographic distance is self-explanatory; cultural distance refers to the differences between cultures or societies within which suppliers or firms are based (see Hofstede 1980) and organisational distance is defined by the number of tiers that exist between a firm and suppliers or customers, and the length of the supply chain (Banet 1976, in Awaysheh & Klassen 2010).

[39] For example, perceptions of agent business practices and available product information or agent perceptions of buyer interest in provenance.

assurances that [the artworks] had indeed been produced by…Aboriginal people". Another prominent gallery owner has posed that government initiatives should focus on educating the public about good ethical practice (Rentschler & Bagaric 2004, p.2). Whether providing increased product information assists buyers in making choices (Consumer Affairs Victoria 2006; Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985), or whether they are interested in such information, is as yet unknown.

Consumers frequently make purchase choices with only imperfect product information available to them (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982). It has been posed that in such situations consumers have a tendency to 'assume the worst', inferring negative product attributes (Johnson & Levin 1985). Further, the more uncertainties a consumer has about a product, the less certainty they will have about choosing it (Sharp & Romaniuk 2004). Despite this, consumers do not work hard to seek out extensive product information. This means that purchase choices are often based upon a range of superficial judgments, which combine to assuage the buyer's concerns arising from missing information and create an overall perception that the product or the person selling it 'will do' (Crozier & McLean 1997). This may hold for Aboriginal and Torres Strait Islander art purchases, which are relatively infrequent, meaning that the buyer may have limited knowledge about the product or the agent selling it.

Seller reputation may be one quality cue that enables more involved buyers to establish a repertoire of agents (Crozier & McLean 1997; Delmastro & Castriota 2012; Landon & Smith 1998; Shapiro 1982), given that repeat choice is less risky than purchasing through an unknown supplier (Mitchell &

Greatorex 1993)[40]. Seller reputation is particularly important in markets dominated by uncertainty (Delmastro & Castriota 2012). The wine market, as previously noted, has historically experienced fraudulent behaviour, resulting consumer uncertainty about product quality and pricing, increased regulation and a classification system for products (AOCs) (Charters & Pettigrew 2003; Delmastro & Castriota 2012; Lockshin & Hall 2003; Teil 2010). Reputation and brand are closely linked, and a company's brand is valuable if its reputation engenders trust and confidence in its stakeholders and customers (Roberts 2003).

The activities of a small number of unscrupulous dealers may be contributing to a lack of consumer trust the 'brand' of Aboriginal and Torres Strait Islander art and to perceptions that the market overall is plagued by problems of attribution and authenticity (De Marchi & Wilson-Anastasios 2009; Wilson-Anastasios 2011). Media coverage of such issues appears sporadically in the popular press (Gennochio 2008; McDermott 2008; Perkin 2006; Rothwell 2006), encouraging negative perceptions of sellers of Aboriginal art and damaging to the brand of Aboriginal art[41]. Reliance upon positive seller reputations may help consumers reduce risk when making purchase choices (Charters & Pettigrew 2003; Delmastro & Castriota 2012; Lockshin & Hall 2003).

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[40] This is less relevant for low-involvement buyers, for whom purchases are extremely infrequent or even one-off, and who therefore do not have a repertoire of agents. For such buyers, reliable information, provided either by the seller or through another means, may simplify their choice and provide them with another quality cue on which to base their choice (Hansen 2005).

[40] Indeed, prominent Aboriginal art dealer Adrian Newstead has, in 2014, published a memoir entitled *The Dealer is the Devil*.

Industry regulation

The globalisation of consumption has led to increasingly large supply chains, and multinationals and other large businesses have faced growing pressure to develop and maintain effective and equitable systems to ensure quality and equitable conditions for their workers (Mamic 2005). Businesses and industries have adopted codes of conduct with the aim of influencing the practices of their partners and providing a baseline of expected standards (Mamic 2005). Where codes of conduct are sufficiently detailed and have the ability to enforce compliance they can be effective; though this is often not the case (Awaysheh & Klassen 2010; Emmelhainz & Adams 1999). The Indigenous Art Code has limited enforcement ability, a fact that its Chairman, QC Ron Merkel, has described as "a structural flaw" (Raffan 2013, p.61).

Indigenous Art Code

As stated in Chapter One, the Indigenous Art Code (the Code) was a key recommendation of the 2007 Senate Inquiry (Australia Council for the Arts 2009; Janke & Pham 2009; Perkin 2006; Rothwell 2006) and was aimed at regulating the behaviour of agents[42] and assisting consumers to make informed purchase choices. The Code was endorsed in August 2009 and became operational in July 2010, but continues to divide industry stakeholders (Raffan 2013). Some feel the Code's membership policy does not discern between ethical and unethical agents (Commonwealth of Australia 2007)[43], others view it as an example of over-regulation in a free market

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[42] The Indigenous Art Code defines ethical dealing in the Aboriginal and Torres Strait Islander art market as upholding the following core values and minimum standards of practice: a) Acting fairly, honestly, professionally and in good conscience when dealing with an artist; b) Not making false or misleading representations or engaging in conduct which constitutes misleading or deceptive conduct; and c) Respecting the rights of artists and use their best endeavours to identify and adhere to applicable Indigenous cultural practices (Indigenous Art Code 2014).

[43] The Code requires signatories to claim they adhere to a set of minimum standards, but has limited enforcement capacity. Some agents claim that unethical dealers have become signatories, yet continue to behave unethically. This is discussed in more detail in the next section.

(Owen in Kerin 2012). Others agree with the principles of the Code, but lament its lack of marketing and promotion (Haider, in Raffan 2013)[44]. During sector consultations in 2009, the issue of consumer education and uptake of the Code was raised by a number of industry stakeholders (Acker 2009; Eccles 2009), as this quote demonstrates:

> *The single biggest impact on trade practices will come from informed consumers. Consumers who ask relevant questions at the point of sale and choose one artwork over another, based on the retailers' compliance with a code of conduct and ethics will be an enormously powerful force within the industry… The Code will have little recognition and value if consumers are neither aware of the Code, nor able to use the leverage the Code provides in guiding their Indigenous art purchases* (Acker 2009).

This thesis addresses buyer perceptions of the Code, thereby contributing to an assessment of its efficacy in creating "consumer demand for high ethical standards" (Haider, in Raffan 2013, p.60) and to existing academic literature on success factors in managing ethical supply chains through the use of codes of conduct (Awaysheh & Klassen 2010; Emmelhainz & Adams 1999; Mamic 2005; Roberts 2003).

Whilst data collection for this thesis focused on the Indigenous Art Code in terms of perceptions of industry regulation, due to the relevance to the research problem of its mandate to assist consumers in making informed purchase decisions, there are a number of other relevant federal legislations which are described briefly below.

[44] As The Code was a key recommendation of the Senate Inquiry and was held up as a solution to inequitable commercial practices, it is significant that there continues to be such industry ambivalence towards it (Wagner 1998, p.126).

Resale Royalty Scheme

The Resale Royalty Scheme for Visual Artists is a Commonwealth initiative legislated in 2010. Under the scheme, art purchases of more than $1000 attract a 5% resale royalty, including Art Centres who purchase works up front and on-sell on the artist's behalf through commercial agents. This has been seen to undermine the role Art Centres play in mediating between artist and market, by making them liable to incur royalty costs. Some claim the Resale Royalty has contributed to a lack of consumer confidence in the Aboriginal art market – "The biggest single negative of the [Resale Royalty] scheme is the effect it has had on buyer confidence and buyer numbers" (Sanders & Walker 2012) – though such statements are not based on empirical evidence.

Superannuation Law

It has also been argued that changes to superannuation law have had a destabilising effect upon the market (Glenday 2010). All artwork purchased through a Self Managed Superannuation Funds (SMSFs) must now be permanently stored out of view and valued annually (Glenday 2010). Too onerous for many Aboriginal art collectors, a number of significant collections were released onto the secondary market throughout 2012 and 2013. It is feasible that this contributed to over-supply and destabilised consumer confidence (Boland 2012a). However, it is again unknown what consumer perceptions are, if any, of this legislative change.

Protection of Movable Cultural Heritage Act 1986

This Act regulates the export of art deemed to be of cultural significance to Australia. The requirements are more onerous for Aboriginal and Torres Strait Islander art than other Australian art (Boland 2012b; Sanders & Walker 2012). Whilst non-Indigenous art must be worth more than $250,000 and be over thirty years old to require export clearance, Aboriginal and Torres Strait Islander artworks worth more than $10,000 and more than twenty years old require clearance (Boland 2012a; Raffan 2012b; Rothwell 2010; Wilson 2010b). This thesis hypothesised that it would be unlikely that this legislation will be relevant to many buyers in the lower and middle price tiers of the primary market, but it is included here as background information for the reader.

Chapter summary

This literature review has revealed the lack of prior research on buyer behaviour in the Aboriginal and Torres Strait Islander primary art market, and on art consumption in primary markets more broadly. This provides significant opportunities for research in this field, but also makes evidence-based hypotheses difficult to generate. However, existing literature on buyer behaviour in other consumption contexts, and in secondary art markets, was very useful in generating the key research questions and a framework within which findings can be discussed.

Chapter Three: Research design

This chapter outlines the method employed to answer the research questions. It begins by describing the two-tiered mixed methods research design and sampling frames chosen. The design and testing of data collection instruments and methods of data analysis are then explained, and the chapter concludes with reflections on relevant methodological issues.

Human Research Ethics Committee Approval

The University of South Australia's Human Research Ethics Committee has provided ethics approval for the research design and data collection described in this chapter (protocol number 00000028480).

Rationale for chosen methods

Mixed methods

A two-tiered mixed methods research design was most appropriate for this study, enabling broad empirical insights through quantitative surveys[45], followed by exploration of identified themes through in-depth interviews with a small qualitative sample. The combination of these methods was necessary to achieve a statistical baseline in relation to consumer profiles, purchase characteristics and a range of attitudinal and claimed behaviour measures, and a deeper understanding of those issues through qualitative interviews.

Because of the under-researched nature of the Aboriginal and Torres Strait Islander art market, and the significant knowledge gaps discussed in Chapters One and Two, it was necessary to first describe basic consumption characteristics – Who buys this art? What do they buy? Where do they buy it? How much do they usually spend? For this reason, the key research questions are descriptive in nature, enabling baseline attitudinal and claimed purchase data to be collected in order to begin to close these basic knowledge gaps. The surveys enabled this baseline data to be collated from a national sample of buyers.

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[45] See Appendix 3 for a copy of the survey questions.

The rationale for the semi-structured interview method was that open-ended questions, which allow respondents to shape their own responses, whilst steering the interview towards issues of interest, would enable the greatest depth of information and therefore the richest results.

Triangulation

Interviews explored consumption from the viewpoints of actors in the supply chain, seeking to expose prominent narratives and accounts (Woodward 2003) of relevance to the key research questions. The perspectives of agents were sought during this phase, triangulating consumer data to reveal areas of consensus and divergence. Triangulation has been defined as "gathering and analysing qualitative and quantitative data separately" (Erzberger & Kelle 2003, p.457) to enable valid inferences to be drawn. Jonsen and Jehn (2009) reiterate that the "convergence of methods" through triangulation can produce more objective results that "go beyond the personal biases that stem from single methodologies" (Flick 1992, in Jonsen & Jehn 2009, p.125). This study incorporates two definitions of triangulation: "between methods triangulation" (Brannen 1996; Brannen and Peterson 2009; Paul 1996, in Jonsen & Jehn 2009), whereby the strengths and weaknesses of different methods can be "played off" against each other in order to reduce "threats to internal and external validity" (Denzin 1978, p.308), and within-methods triangulation (Brannen 1996; Brannen and Peterson 2009; Paul 1996, in Jonsen & Jehn 2009), where more than one target population are studied using the same method in order to strengthen results.

Triangulation was important for this study given the limitations of attitudinal and claimed behaviour data (Ajzen & Fishbein 1977; Auger & Devinney 2007; Carrigan & Attalla 2001; Carrigan, Szmigin & Wright 2004; Carrington, Neville

& Whitwell 2010; De Pelsmacker, Janssens & Mielants 2005; Devinney et al. 2010; Sharp 1997, 2010; Vermeir & Verbeke 2006; Wright & Klÿn 1998), as opposed to observational data. Triangulation also mitigated the risk of recollection bias (Erdfelder, Brandt & Broder 2007; Guilbault et al. 2004) and acquiescence bias (Javeline 1999) inherent to self-report data. By analysing the perspectives of different actors regarding the same issues, findings that may have otherwise been at risk of lacking reliability are strengthened. Whilst it is recognised that subjectivity accompanies all data interpretation (Greene and McClintock, 1985; Jick,1979 in Jonsen & Jehn 2009), the use of triangulation assisted in mitigating this risk.

Professional networks

The author's professional networks guided sampling decisions to some degree. Having worked in the Aboriginal and Torres Strait Islander arts industry in arts management and curatorial roles for some years allowed good access to host organisations for the survey phase and agents for qualitative interviews. Having prior knowledge of the intricacies of the commercial sector (knowing which agents sold in which price tiers, for example) certainly made the segmentation process much easier than it would otherwise have been. This knowledge of the sector also enabled the author to quickly and easily comprehend the responses of agents and buyers when discussing industry issues and may have aided the natural flow of conversation.

Quantitative data collection

Sampling frame and sample sizes

The quantitative sampling frame was devised to enable opportunistic access to a cross-section of consumers at three key art-buying events:

- Darwin Aboriginal Art Fair (DAAF): 10 - 12 August 2012
- Cairns Indigenous Art Fair (CIAF): 17 – 19 August 2012
- Desert Mob, Alice Springs: 7 – 8 September 2012

These events are important distribution channels for Aboriginal and Torres Strait Islander art, serving both as networking opportunities for high-end collectors, curators and government funders, and as initial access points for new buyers (Young & Collins 2011). As well as attracting local residents, they also attract art collectors from around Australia, and internationally. Because of the diversity of products, price points and visitors, the fairs serve as excellent sampling frames for this research. Survey participation at each art fair was open to all visitors – the only criterion was attendance, which was assured as the kiosk was just inside the entrance.

Data collection was replicated across the fairs, producing three data sets. Replication enables researchers to learn whether findings hold across multiple samples and this provides a basis for establishing empirical generalisations (Uncles & Kwok 2013). In total, 874 responses (n=874) were collected across the three events (DAAF: n=460, CIAF: n=324, Desert Mob: n=90). Sample sizes varied, reflective of both total visitation at each fair (see Table 2 below) and the structure of the data collection process (discussed further later in this chapter). Data sets 1 (DAAF), 2 (CIAF) and 3 (Desert Mob) were very similar along demographic[46], behavioural and attitudinal lines, suggesting internal validity of findings.

	Data set 1	Data set 2	Data set 3
Data set	DAAF	CIAF	Desert Mob
Location	Darwin	Cairns	Alice Springs
Dates	12-14 Aug 2012	17-19 Aug 2012	7-8 Sept 2012
Duration	3 days	3 days	1 day (total)
Sample size	460	324	90
Total visitors	4,267	7,487	Not recorded
% surveyed	11%	4%	Unknown

Table 2: Summary of data sets captured using quantitative method.

Price tier segmentation

Each event has a different approach to pricing. The Desert Mob Marketplace maintains an upper limit of $500, whereas there are no price constraints for works in the curated Desert Mob exhibition. Prices at CIAF and DAAF vary considerably and there are no pricing constraints. As a generalisation, however, more works are offered in the lower and middle price tiers than at the high end (see price tier segmentation on the next page). To reflect these differences whilst enabling comparisons between all three fairs, the price tiers listed in the survey were divided into more categories at the lower end, enabling more detailed segmentation within the lower price tiers.

[46] Exceptions to this are reported home postcodes, with a strong local representation (between 30 and 38%) at each event.

Market segment	Price tier (by purchase value)
Top Range	> $20,000
High Range	$10,000 > $20,000
High Mid-Range	$5,000 > $10,000
Mid-Range	$1,000 > $5,000
Low Mid-Range	$500 > $1,000
Low Range	<$500

Table 3: Primary market price tier segmentation employed in this thesis and across other Art Economies Project studies.

Description of quantitative data sites

Individual agreements were secured with the organisers of each fair. Darwin Aboriginal Art Fair sub-contracted the author to undertake data collection in place of their own audience evaluation processes, enabling control over most of the survey content, which was then standardised across the three events to achieve generalisability of results. The author negotiated a formal partnership between the CRC-REP and the Cairns Indigenous Art Fair to ensure collaboration with an external consulting firm that was conducting a separate visitor survey at CIAF[47]. Desert Mob does not conduct audience evaluations, but agreed to host the data collection team[48].

[47] This survey had an emphasis on general tourism data but few questions on art purchasing, and therefore I advocated for permission to use my survey instrument as well. Whilst this necessitated two survey instruments, and may have affected total response numbers from the CIAF data set due to possible survey fatigue, it was a stipulation of our agreement that both surveys be conducted.

[48] They also do not collect total visitation numbers at the Desert Mob Marketplace. There is therefore no way of measuring the representativeness of the sample surveyed, nor the percentage of total visitors surveyed.

Data set 1: Darwin Aboriginal Art Fair 2012

Figure 6: The interior of the Darwin Aboriginal Art Fair. Image courtesy Darwin Convention Centre.

Darwin Aboriginal Art Fair is a three-day public art-buying event, which takes place every August at the Darwin Convention Centre and is funded by the Northern Territory and federal governments through Arts NT and the Australia Council for the Arts. August is the height of the tourist season in Darwin; various arts and cultural events take place at this time, including Darwin Festival, National Aboriginal and Torres Strait Islander Art Awards and the National Indigenous Music Awards.

Figure 7: Entrance to DAAF. Image courtesy Mikey Leung, Darwin Aboriginal Art Fair.

Only incorporated Aboriginal or Torres Strait Islander Art Centres can register as vendors at the Darwin Aboriginal Art Fair – commercial galleries and other agents cannot participate. Staff and artists from Art Centres travel from all over the Territory and Western Australia to participate, staffing their stalls and participating in concurrent workshops, lectures and forums. The fair is an important and multifaceted event for participants, presenting opportunities for skills development and networking, as well as commercial opportunities.

Some Art Centres see the fair as an opportunity to position their artists for the high-end market, and set up their stalls sparingly, akin to a curated exhibition space. These Art Centres may display only a handful of works, each with substantial price tags, and use the event to secure future exhibitions or commission opportunities. Others see the fair as a ‘stock take sale’ of sorts, and fill their stalls to the brim with works of varying prices and quality.

Data set 2: Cairns Indigenous Art Fair 2012

Figure 8: View of the Cairns Wharf during CIAF. Image courtesy Mornington Island Cultural Centre.

CIAF occurs the weekend following DAAF, and is again a three-day public art-buying event, held at the Cairns Wharf. The event is funded by both the Queensland Government, through Events Queensland and Arts Queensland[49], and the federal government, through the Australia Council for the Arts. CIAF also has a range of corporate partners and sponsors. As opposed to DAAF and Desert Mob, participation at CIAF is open to both Art Centres and commercial art galleries. Another key difference is that CIAF is pitched at the higher end of the market, despite the fact that the Queensland Aboriginal and Torres Strait Islander art 'industry' is relatively new in comparison with the Northern Territory.

[49] The recent Queensland labor government provided significant funding both for CIAF itself and for the establishment of new Art Centres in Far North Queensland and the Torres Strait Islands. The Liberal National Party was voted into power in late 2012 in Queensland, and has reduced funding to the Cairns Indigenous Art Fair, as well as to a number of arts and cultural events across the state. The event has been moved out of the portfolio of Arts Queensland, and was presented on a smaller scale in 2013, ahead of a transition that will see the event managed by a non-profit organisation.

Figure 9: CIAF opening night. Image courtesy Cairns Indigenous Art Fair.

Similarly to DAAF, CIAF provides professional development and networking opportunities for artists, arts workers and Art Centre managers through a range of public forums, workshops and training activities. In addition, CIAF offers a paid VIP preview to national and international collectors, through its Collectors and Curators Program, demonstrating CIAF's aim to position itself at the high end of the commercial market.

Data set 3: Desert Mob, Alice Springs

Figure 10: Scenes from the Desert Mob Marketplace. Images courtesy Warakurna Artists and Thriving in the Desert.

Desert Mob takes places in September each year at Araluen Arts Centre in Alice Springs. Desert Mob differs from DAAF and CIAF in that the ‘art fair’ component (the Marketplace) takes place for one day only, compared with three-day events in Darwin and Cairns. The Marketplace has the feel of a bustling crafts market. Similarly to DAAF, the Desert Mob Marketplace is an Art Centre-only event, and those Art Centres are all Desart[50] member Art Centres from the Central and Western Desert regions of the Northern Territory, Western Australia and northern South Australia.

The Marketplace also differs in that there is a $500 upper limit placed on the prices of works for sale. This is in recognition of the fact that the Marketplace occurs in conjunction with a curated commercial exhibition in the same gallery space. The curated exhibition contains works selected by participating Art

[50] Desart is the Central Australian equivalent of ANKAAA in Northern Australia, and is the peak body for Aboriginal Art Centres in remote Central Australian regions of the Northern Territory, Western Australia and northern South Australia.

Centres and aims to demonstrate the breadth and quality of Central Australian art. It is highly regarded as a genesis of emerging fashions in desert art: “All through the past decade, the show has taken the pulse of the inland, and given notice of emerging trends” (Rothwell 2013). A symposium is also held, consisting of presentations by Art Centres, artists and musicians.

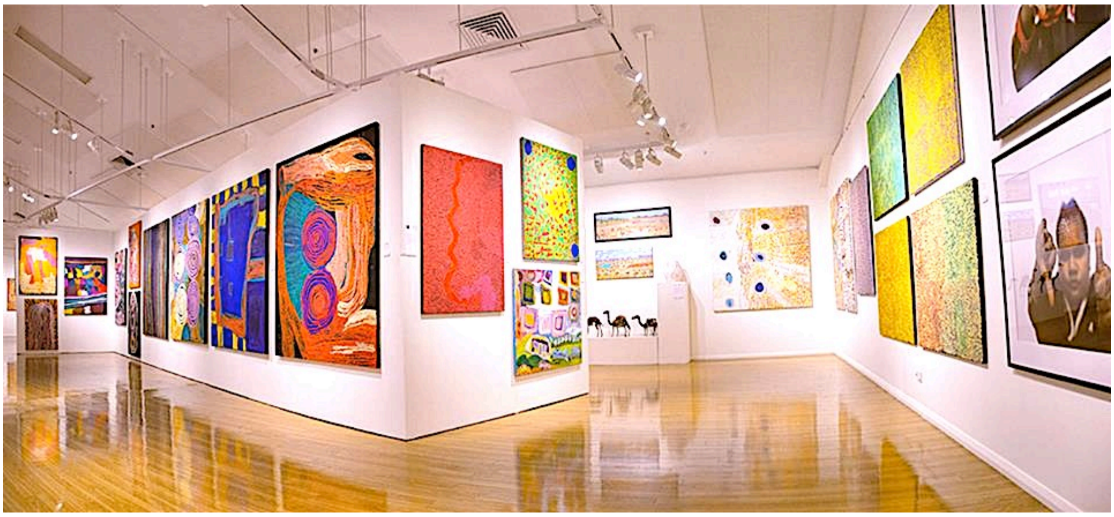

Figure 11: Curated 'Desert Mob 2013' exhibition. Image courtesy Lisa Hatzimihail Photography.

Due to the significantly shorter duration of the Marketplace, in comparison with DAAF and CIAF, and the fact that the opening night of the Desert Mob exhibition attracts a large and diverse audience, it was decided that survey collection would commence on the opening night and continue until the close of the Marketplace the following day. This provided greater opportunity to increase the sample size in line with the number of responses collected at DAAF and CIAF. However, the total number of surveys collected at Desert Mob (n=90) reflects the shorter time period available for data collection.

The design and testing of the survey instrument will now be discussed, in order to relate the quantitative method to the key research questions.

Design of survey instrument

The survey instrument was designed in consultation with the wider CRC-REP Art Economies Project research team, in order to ensure findings could be correlated and generalised across research areas. In particular, assistance from the team's data analyst, Dr. Alice Woodhead, was useful in developing the survey content. The survey instrument contained 71 variables relevant to the three research questions:

RQ1: *What are the profiles and purchase characteristics of consumers in the lower and middle price tiers of the primary market for Aboriginal and Torres Strait Islander art?*

- Basic demographic information (sex, age, town / country of residence)
- Claimed purchase behaviour (purchase locations, most common purchase locations, most recent purchase by year / medium / price / source, lifetime spend)

RQ2: *In their evaluations of Aboriginal and Torres Strait Islander art products, what criteria do consumers in the lower and middle price tiers of the primary market use to make purchase choices?*

- Intention to purchase criteria
- Claimed purchase criteria (most recent purchase)

RQ3: *What awareness levels and perceptions exist among consumers regarding artwork provenance, available consumer information and industry regulation?*

- Perceived importance of provenance to purchase choices
- Perceptions of Art Centre provenance
- Views on Art Centre and commercial agent mark up practices
- Perceptions of availability of consumer information
- Awareness and uptake of Indigenous Art Code
- Sources of consumer information

Development of purchase criteria for testing

Consumer purchase criteria were investigated through a question that asked respondents to rank (on a 10-point scale, with 10 being most important and 1 least important) the purchase criteria in the table on the next page.

Purchase Criteria	Survey wording
Price	*"It was a good price"*
Aesthetics / Visual Appeal	*"I liked the colours / design / pattern, etc. and it will look good in my home"*
Quality Craftsmanship & Materials	*"It demonstrates quality craftsmanship & uses quality materials"*
Demonstration of Culture	*"It's a demonstration of Indigenous culture"*
Subject Matter / Story	*"I was interested in the subject matter or story it depicts"*
Australian Souvenir	*"It is a distinctly 'Australian' souvenir"*
Artist Interest	*"I have a particular interest in the artist"*
Financial Investment	*"I see it as a financial investment"*
Care about Indigenous Issues	*"I care about Indigenous issues and think it is important to support Indigenous artists"*
Personal / Professional Connection	*"I have a personal / professional connection to the artist and / or the community the item is from"*

Table 4: Answer choices offered in rank order claimed purchase criteria survey question.

The literature review provided context for the development of the 10 criteria selected for testing. Specifically, texts relating to hedonic and aesthetic consumption (Bourdieu 1984; Hirschman 1983; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Woodward 2003), ethical consumption (Carrigan & Attalla 2001; Carrington, Neville & Whitwell 2010; De Pelsmacker, Driesen & Rayp 2005; Shaw & Shiu 2003) and quality cues (Charters & Pettigrew 2003; Hamlin 2010; Hansen 2005; Teas & Agarwal 2000; Zeithaml 1988), as well as pricing studies (Andreyeva, Long & Brownell 2010; Bolton, Warlop & Alba 2003; Landon & Smith 1998; Lockshin & Rhodus 1993; Monroe 1973; Velthuis 2003; Zeithaml 1988). The criteria were refined during the testing phase (discussed in the next section), which allowed for input from relevant stakeholders.

Whilst the survey instrument allowed only claimed self-report data, which has a high likelihood of social desirability bias (Bruner & King 2000), it was deemed useful to first understand the way consumers viewed their consumption behaviour; the values they claim to hold (Auger & Devinney 2007; De Pelsmacker, Janssens & Mielants 2005; Sharp 1997; Vermeir & Verbeke 2006).

Testing of survey instrument

Online survey program Survey Monkey was selected for data collection both for its ability to operate as a 'kiosk' (allowing multiple responses to be entered simultaneously) and because it is a web-based system, able to be accessed from anywhere with an Internet connection. Once the survey questions had been entered into Survey Monkey, the instrument was put through pilot testing. It was distributed to approximately 50 industry stakeholders and colleagues for feedback[51]. This enabled a fine-tuning process that was hugely beneficial. Changes were made to the ordering and wording of questions in order to make them more explicit and easily understood, and response options that had been over-looked were added to some questions[52].

[51] This group of stakeholders consisted of art industry professionals such as gallery owners and staff, Art Centre staff, peak body representatives, collectors, public gallery staff and academics. My supervisors, as well as Assoc. Prof. Tangi Steen, Associate Head of School: Teaching & Learning at the University of South Australia (who was recommended to me as an expert in survey design) were also consulted.

[52] For example, it was pointed out that the survey did not ask respondents for their lifetime spend on Aboriginal or Torres Strait Islander art, and that the purchase criteria question did not include reference

Coordination of data collection

Survey team

The author coordinated and conducted all data collection for this thesis, negotiating partnerships with host organisations, travelling to each art fair[53] and organising a team of assistants for each event. Two assistants were engaged to assist with data collection at each fair, and all were either members of the Art Economies Project team or independent contractors with relevant experience in data collection and / or arts management. The author developed a roster with staff rotations every 4 hours and oversaw the running of the survey kiosks for the duration of each fair. The assistants were trained to answer basic questions about the nature and purpose of the research, but were instructed to direct any further questions to the author, who was on site at all times to answer questions about the research and the wider Aboriginal and Torres Strait Islander Art Economies Project. There was significant interest in the research, and many noted the complete lack of published research into the motivations and preferences of consumers.

Participant selection

As the survey kiosk at each event was set up at or near the entrance to the event, it was anticipated that there would be the opportunity to have multiple respondents completing the survey at once. In order to capitalise on this, the

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to 'quality craftsmanship and materials', which was seen as important. One colleague suggested the purchase criterion 'personal connection to artist or community', which was incorporated into that question's answer choices in order to identify respondents who either worked at Art Centres or had other connections to remote communities, as a large number of these respondents could potentially skew results towards Art Centres. Overall, the survey was received well and suggestions were relatively minor in nature. Glitches in the functionality of the online survey tool were also ironed out during this testing phase.

[53] Attending each event also enabled me to make contacts for the qualitative phase, both consumers and agents. This is discussed in further detail later in this chapter.

author loaned three iPads from the CRC-REP, enabling three simultaneous online responses, as well as paper-based responses for respondents not comfortable using an iPad[54]. The physical position of the survey kiosk meant that there was a constant flow of visitors entering and exiting each event. This meant that participant selection was relatively random, based upon proximity to the survey kiosk. However, at quieter times the research team did approach visitors milling about the entrance, and at such times some selection bias may have occurred in the collection of responses; members of the research team may have, consciously or unconsciously, intercepted people they presumed would be amenable to participating.

Once potential participants had been greeted and the nature of the research explained to them, they were handed a Participant Information Sheet[55] and a Participant Consent Form[56] to read and sign prior to commencing the survey. Any questions were answered at this time, and the Participant Consent Forms collected and filed. Participant Information Sheets were given to the respondents to keep, along with a copy of the Aboriginal and Torres Strait Islander Art Economies Project Postcard[57], if they were interested in learning more about the AEP. Respondents were guided to a table and chairs where the iPads and hard copies were set up, and those completing the survey on an iPad were given a brief overview of how to move through the survey online. The research team was there to assist respondents with any trouble they had with the iPads, or with any survey questions[58].

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[54] There was strong uptake of both the online and paper-based surveys at each event. Generally, most people were happy to use an iPad if it was available, but often all three were in use and at these times it was fortunate to have the paper copies available, as we would have lost responses without this 'back up' response option.

[55] See Appendix 4 for a copy of the Participant Information Sheet.

[56] See Appendix 5 for a copy of the Participant Consent Form.

[57] See Appendix 6 for a copy of the Project Postcard.

[58] Overall, the only question that caused respondents some difficulty was a question that asked them to rank 10 purchase criteria, in order of importance. The limitations of this question and the difficulties it posed are discussed in more detail in the final section of this chapter.

Analysis of quantitative data

Quantitative data was analysed using SPSS software. A range of frequencies and cross-tabulations and ANOVAs were conducted (using a 95% significance level) in order to address the key research questions, across the three data sets. Analysis was initially conducted on each data set separately, but when it was established that the results from each fair were so closely aligned, a decision was made to analyse the three data sets concurrently, and to draw inferences from the three together.

Many Sets of Data (MSoD)

A result can be regarded as predictable when it has recurred consistently under a known range of different conditions. This requires the analysis of many sets of data (MSoD), drawn from different populations (Ehrenberg & Bound 1993). The MSoD approach to statistical analysis allows for the testing of ‘significant sameness’ (Bound & Ehrenberg 1989) in results across different data sets, the basic criterion being whether the same results hold for all the different data. The significant sameness paradigm is aimed at theory, or knowledge, development (Hubbard & Lindsay 2013), and is established through basic descriptive statistics such as averages and means. Whilst the MSoD approach is usually applied in situations where empirical generalisations have previously been established (then used to test for ‘significant sameness’ with MSoD) (Bound & Ehrenberg 1989), for this study the data sets were collected concurrently, and analysed concurrently. The same constructs, measurements, population definitions and survey instrument was used, as in typical replication studies (Ball & Sawyer 2013). This approach enabled correlations and dissonances between the data sets to be discovered, strengthening the validity of findings.

Qualitative data collection

Relationship between quantitative and qualitative data

After quantitative data was analysed, 20 qualitative semi-structured interviews were conducted with a purposive sample of consumers (n=10) and agents (n=10), designed to achieve within-methods triangulation (Brannen 1996; Brannen and Peterson 2009; Paul 1996, in Jonsen & Jehn 2009) by capturing both buyer and seller perspectives about consumer decision-making and, through the analysis of qualitative results in relation to quantitative results, between methods triangulation (Brannen 1996; Brannen and Peterson 2009; Paul 1996, in Jonsen & Jehn 2009), whereby the strengths and weaknesses of qualitative and quantitative methods are "played off" against each other to strengthen validity (Denzin 1978, p.308).

Quantitative data provided broad insights into the consumer profiles and purchase characteristics of buyers in the lower and middle price tiers. Due to the nature of quantitative research, and particularly the survey format, the questions and responses necessarily sought mostly descriptive statistical information about these issues. As discussed at the beginning of this chapter, in-depth qualitative interviews were required to enable deeper understanding of key issues, particularly in relation to this thesis' second and third research questions (purchase criteria and perceptions of provenance, available consumer information and industry regulation).

Sampling frame and sample sizes

Interviews (approx. 30-60 minute duration) were conducted from June – September 2013. The sampling frames and sample sizes are described below:

Participant selection - buyer sample

A purposive sample of buyers of Aboriginal and / or Torres Strait Islander art was identified one of two ways. Either they were a respondent at one of the three art fairs, and provided their name and contact details on the sheet of paper available[59], or another interviewee (either a buyer or an agent) introduced them to the author. Potential respondents were approached by email initially, and provided with a Participant Information Sheet and a Participant Consent Form[60]. The research was explained to them in writing, and if they were interested in being interviewed they were asked to return the Participant Consent Form by email or post. Buyer respondents were selected based upon the following two criteria:

- That they mostly purchased art in the primary (as opposed to the secondary) market;
- That they mostly purchased in the lower and middle price tiers (between $500 and $5,000)[61].

This was ascertained with the use of a basic verbal (by phone) or written (by email) screening process once contact had been made. This approach proved effective in targeting an adequate number of desired respondents, but not in avoiding one important inherent bias – those who agreed to participate were necessarily somewhat regular[62] buyers, as one-off buyers were difficult to access. More regular buyers are likely to have different perspectives to one-off buyers, given their involvement level would most likely be higher, their

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[59] There was a sheet of paper available at each fair for respondents to write their details on if they were interested in being contacted for an interview.

[60] All documents, including the text used to make the initial approach to respondents, were approved by the HREC when ethics clearance was approved. Please see Appendix 7 for a copy of the Participant Information Sheet. The Consent Form was identical to that provided as Appendix 5.

[61] Whilst an attempt was made to target buyers whose purchasing characteristics fitted into the price tiers with which this thesis is concerned, it was also recognised that consumers often purchase in a range of price tiers, and that therefore this sampling frame would need to be somewhat fluid.

[62] In saying this, there was variation between the 10 buyer respondents, with some having purchased one or two pieces over a fifteen-year period, and others purchasing multiple artworks per year. Overall, the diversity was sufficient, but this bias existed nonetheless.

spending relatively more frequent and potentially their knowledge levels higher[63].

Participant selection - agent sample

A purposive sample of agents was devised concurrently with the buyer sample. A list of relevant agents was formulated and refined in consultation with other members of the AEP (in order to ensure the same agents were not approached multiple times by different members of the research team). Agents were again targeted based on the following two criteria:

- That they mostly sold Aboriginal and / or Torres Strait Islander art in the primary (as opposed to the secondary) market;
- That they mostly sold art in the lower or middle price tiers (between $500 and $5,000).

There were 28 agents considered overall, with 13 on a ‘short list’ (agents considered most appropriate by the author based on the above criteria) and 15 more on a ‘long list’, who would be targeted should members of the short list decline to be interviewed. Of the 13 on the short list, 7 were interviewed, 5 declined or did not respond[64] and 1 was never approached[65]. 3 agents from the long list were then approached to make up the final 10 interviewees. Of the 10, 2 were international (one from the USA and one from France, reflecting the strongest international markets as described in the literature review). Again, potential respondents from the short list were approached by email initially, and provided with a Participant Information Sheet and a

[63] A valuable extension of this approach would be to target one-off buyers, to see how their responses differ to the sample used in this study.

[64] After the initial approach by email, each agent who did not respond was contacted again by email 2 weeks later, and then by phone 1 week after that. If they still did not respond, they were not contacted again. Of the 5, 4 did not respond at all and 1 declined. The 1 agent that declined did so because she felt her core business was in a higher price tier than those that are the focus of this thesis.

[65] The author decided that this agent was extraneous to the core focus of this thesis.

Participant Consent Form. The research was explained to them in writing, and if they were interested in being interviewed they were asked to return the Participant Consent Form by email or post.

Agents clearly sell across price tiers and this is reflected in the final sample – whilst the majority focuses on the middle market, some also sell works at the high end. The final sample included predominantly commercial gallery owners, reflective of the predominance of the commercial gallery system in the primary market[66]. Commercial gallery owners are very well placed to comment on the profiles, purchase characteristics and choices of consumers, as they deal with them on a daily basis.

An attempt was made to target a diversity of agents, including those who dealt primarily with Art Centres, and those who did not. However, most[67] agents who agreed to participate worked predominantly with artists through their representative Art Centres. As discussed in Chapter Seven of this thesis, this means there is an inherent bias within the agent sample towards agents working with Art Centres. It is likely that this bias has skewed some results, particularly in relation to perceptions of Art Centres and Art Centre provenance. However, the sample was ultimately self-selecting, given that the agents who work outside the Art Centre system declined to participate. This bias was therefore difficult to avoid but was taken into account when making inferences from the results.

[66] There was one agent whose business was more akin to a 'shop', another who did not operate a gallery open to the public but instead saw clients by appointment, and another who coordinated large commercial shows as a consultant for a large company.
[67] 6 of the 10 agents worked only with Art Centres, and the other four worked both with Art Centres and independent artists.

Design of topic guides

The qualitative interview topic guides were developed in order to test emergent themes from the quantitative phase and to deepen understanding of consumer choice in relation to each key research question. The guides were for the author only, and were deviated from when appropriate, but were developed to make sure all required data was captured at each interview. The prompts listed in the table below were for the researcher only, and were only verbalised if the respondent was having difficult answering or understanding the question.

RQ1: *What are the profiles and purchase characteristics of consumers in the lower and middle price tiers of the primary market for Aboriginal and Torres Strait Islander art?*

The questions in the table below were asked of the buyer and agent samples, in order to address RQ1. They build upon the demographic and purchase characteristic information collected in the quantitative phase, adding depth to consumer profiles and the 'what, where and how much' of their purchasing. As previously noted, demographic data was not considered relevant to capture within this sample. The interview began with a broad inquiry into general art purchasing, then respondents were situated within the sampling frame by identifying the price tiers and market (primary or secondary) they most commonly purchased in[68]. Respondents were asked about the Aboriginal or Torres Strait Islander art they like to buy, and questions about purchase methods aimed to draw out perceptions of agent types and

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[68] The issue of projected purchasing was also raised, in an attempt to document whether respondents expected to continue purchasing, and if not, why this might be. Knowledge of potential future buying patterns is of obvious significance to commercial industry stakeholders and to artists, as it can enable them to understand potential future sales.

purchase methods[69]. These questions were also asked of the agent sample, in the context of their customers, in order to triangulate data.

Consumer sample	Agent sample
• Do you buy both Aboriginal and Torres Strait Islander (ATSI)[70] & non-ATSI art? • (If yes) What sort of non-ATSI art do you buy? *Prompts: medium, region, palette.* • What sort of ATSI art do you buy? *Prompts: medium, region, palette.* • What is your price range? • How many ATSI artworks do you have? • Do you intend to continue buying ATSI art? Why? • Where do you purchase from (artwork origin and retail location) and why? • Do you / would you buy ATSI art online, through an online gallery or auction site? • (For older buyers) Do you ever purchase ATSI art through your superannuation fund? If yes, why?	• Do you sell both Aboriginal and Torres Strait Islander (ATSI) & non-ATSI art? • (If yes) What sort of non-ATSI art do you sell? *Prompts: medium, region, palette.* • What sort of ATSI art do you sell? *Prompts: medium, region, palette.* • What price range do you sell in? • What price tiers do you sell the most work in? • Do you intend to continue selling ATSI art? • Where do you source your works from & why? • Do you sell ATSI art online, and if so how popular is this purchase methods with your clients? • Do many of your older buyers purchase through their super funds? Why?

Table 5: General questions asked of both buyers and sellers in the first section of the topic guides, regarding consumer profiles and purchase characteristics (RQ1)

[69] Questions about online purchasing and purchasing through superannuation funds are relevant both to RQ1 and RQ3, in terms of information available about products online, and because recent changes to superannuation law may have impacted upon Aboriginal and Torres Strait Islander art consumption (Albrecht 2012; Battersby 2010; Glenday 2010; Lehman-Schultz 2013; Townsend & Sood 2012).
[70] The acronym ATSI is used here for ease of presentation. It was not used during interviews.

RQ2: *In their evaluations of Aboriginal and Torres Strait Islander art products, what purchase criteria are most used by consumers in the lower-middle price tiers of the primary market?*

In order to address RQ2 it was important to test claimed purchase criteria findings from the quantitative phase against qualitative responses[71]. The questions in this section of the topic guide enabled respondents to articulate their purchase criteria in their own words, and teased out some of the assumptions inherent to the answer choices in the rank order survey question. For agents, this section allowed them to convey their perceptions of consumer purchase criteria. The questions are deliberately open-ended in order to avoid 'leading' respondents, and to avoid potential social desirability bias (Bruner & King 2000).

The buyer sample were asked what made them buy their most recent purchase – any particular attributes or qualities that drew them to it – testing the literature discussed in the literature review about quality cues and attribute-based evaluations. The literature varies in its presentation of this issue, with some authors arguing that there is a marked difference between consumer decision-making in the context of hedonic and consumer goods consumption (Hirschman 1983; Hirschman & Holbrook 1982; Holbrook & Zirlin 1985; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Wertenbroch & Dhar 2000; Wiedmann, Hennigs & Siebels 2009), while others (Davies 2006) maintain that buying art still requires consumers to objectively evaluate a set of separable product attributes, and to trade them off in order to make a purchase decision (Johnson 1974). This question also addresses literature on aesthetics and taste (Adorno 1997; Becker 1982; Bloch 1995; Bourdieu 1984;

[71] This was particularly important given the previously acknowledged flaws in the design of the rank order survey question.

Danto 1964; Hirschman 1983; Hirschman & Holbrook 1982; Hoyer & Stokburger-Sauer 2012; Kant 1790; Osborne 1986; Townsend & Sood 2012; Veryzer 1993; Wagner 1998) and the pleasure (Heine & Phan 2011; Lagier & Godey 2007; Osborne 1986; Wiedmann, Hennigs & Siebels 2009) afforded by the consumption of luxury goods[72].

Consumer sample	Agent sample
• Tell me about the last piece of ATSI art or craft you purchased. *Prompts: medium, region, palette, artist.* • Where did you buy that piece? • Was the environment, the space, in which you bought it important to your choice? • What made you buy that piece? *Prompts: What was important to your choice? Were there particular attributes that drew you to the work?* • Why do you buy ATSI art, generally? • What do you aspire to purchase? (Not asked if they are not intending buying more ATSI art as established above)	• Why do you think your clients buy ATSI art, generally? *Prompts: What's important to them Are there particular attributes they seek?* • Does this vary between clients, and if so what do you think drives those variations? • What do you aspire to consign / sell? *Prompt: is there anything you want to sell but can't access, etc.?* (Not asked if they are not intending selling more ATSI art as established above)

Table 6: General questions asked of both buyers and sellers in the next section of the topic guide, regarding consumer purchase criteria (RQ2)

[72] Initial interviews revealed that respondents found it difficult to discuss the reasons behind their purchases, beyond fairly superficial descriptions of the formal characteristics (colour, form, pattern, etc.) of artworks. Respondents' ability to articulate purchase criteria appeared at least partially dependent upon their level of engagement with purchasing Aboriginal and Torres Strait Islander, with increased engagement seeming to correspond with an increased capacity to articulate purchase choices. This section of the topic guides also sought to understand consumer purchase aspirations in order to see whether there are gaps between supply and demand that may be alleviated through product or market development. Once again, this issue is not explicitly dealt with in this thesis' research questions, but is highly valuable information in order to understand supply and demand in the primary market.

RQ3: *What awareness levels and perceptions exist among consumers regarding artwork provenance, available consumer information and industry regulation?*

This section directly addressed RQ3 and extended quantitative data collected. Questions addressed the availability and reliability of provenance information, supply chain transparency and other sources of consumer information. For agents, their perceptions of consumer agency in seeking out information about the works they purchase were investigated. Once again, these questions were deliberately open-ended in order to allow respondents to articulate their views without prompting. However, one question for the consumer sample (also asked of agents in terms of their customers), 'Do you think about the origin of the artwork you buy?' does explicitly address consumer perceptions of provenance, and whilst it may risk encouraging socially desirable responses, was deemed necessary as this is a significant issue affecting the Aboriginal and Torres Strait Islander art market (Albrecht 2012; Belk & Groves 1999; Circuitt 2008; Eccles 2008; Perkin 2006) and is central to RQ3.

This section of the topic guide also builds upon the section of the survey that dealt with awareness and uptake of the Indigenous Art Code. Where naturally occurring during the interview process, other legislative issues were discussed (such as the Resale Royalty Scheme and recent changes to superannuation law), but only if raised by the respondent.

Consumer sample	Agent sample
• Do you seek out information about ATSI art? *Prompts: exhibitions, books, friends, travel.* • If so, where do you get this information and do you think this influences what you buy? • Is it important to you where the art you buy comes from, its source? Why, or why not? • What, if any, information do you usually receive about the artworks you buy? • Do you know of the Indigenous Art Code? If yes, what are your views? • Do you have any views on the industry you'd like to share?	• Do your clients seek out information about ATSI art? *Prompts: exhibitions, books, friends, travel.* • If so, where do they get this information and do you think this influences what they buy? • What information do you provide clients with when they purchase art? • Do many of your clients ask questions about the provenance of works they buy? • Do many of your clients ask about the Indigenous Art Code? • Do your clients have, or share with you, views on the industry? • Do you have any views on the industry you'd like to share?

Table 7: General questions asked in the final section of the topic guide, regarding consumer perceptions of provenance, available information and industry regulation (RQ3)

Refinement of topic guides during interview phase

During the interview process, some elements of the topic guides were refined and improved. It was found in early interviews that some respondents had trouble describing their artworks and the reasons they had bought them. The implementation of an artwork image tool (wherein respondents were asked to provide the author with an image of a recent purchase to be discussed during the interview) assisted in alleviating this difficulty. It also allowed respondents to reference a particular artwork when describing influencing factors upon their purchase choice, anchoring the discussion to an actual purchase rather than relying upon generalised attitudinal descriptions.

As the majority of buyers interviewed claimed that aesthetics was important to their purchase choices, but that provenance and ethical dealing were as well, a question was introduced into later interviews that asked respondents to ‘trade off’ aesthetics and provenance. In other words, it asked them to respond to a hypothetical dilemma in which they were forced to choose between the visual appeal of a piece and its provenance, with the hypothetical being that the work in question was beautiful but of uncertain provenance.

Data collection

As described earlier in this chapter, initial approaches to potential respondents were made by email. Once respondents had agreed to being interviewed, a time was scheduled to conduct the interview. Where possible interviews were conducted face-to-face (3 buyers and 4 agents were interviewed this way)[73]. Where this was not possible due to the location or availability of respondents, interviews were conducted by phone (7 buyers and 6 agents). In both cases they were recorded with a Dictaphone and then partially transcribed, recording information and passages of conversation relevant to each research question. As anonymity was a requirement, audio and text files were saved without any identifying information.

Data analysis

Thematic analysis

Data was analysed using a thematic approach. Thematic analysis is a flexible method, which can provide a rich, detailed and complex account of data

[73] As part of the author’s CRC-REP scholarship a $5,000 fund was allocated to assist with travel and other costs associated with data collection and completion of the thesis. Where time and availability allowed, and it was cost effective to do so, the author travelled to conduct interviews.

(Braun & Clarke 2006). Thematic analysis involves identifying, analysing and reporting patterns (themes) within data. Those themes are reported on based upon their significance to the research aims, though the process by which this occurs depends upon the type of knowledge the researcher seeks to convey (Braun & Clarke 2006). Analysis may reflect themes common to an entire data set, or to a particular component of it. For this study, analysis focused on the entire buyer sample data set (n=10) and the entire agent sample data set (n=10), with comparisons between them enhancing this approach where appropriate. As noted by Braun and Clarke (2006), this approach (analysis of a data set in its entirety) can be particularly useful when studying an under-researched topic. Analysis took a 'theoretical' (rather than inductive) approach, driven by the author's theoretical or analytic interest in the topic and by the study of relevant literature prior to data analysis (Braun & Clarke 2006). A good thematic analysis goes beyond summarising data, interpreting significant themes and relating them to broader meanings and implications, often in relation to previous literature (Patton 1990). Braun and Clarke (2006) provide a useful and succinct account of the process of thematic analysis, which was followed for this study and is recounted in the table on the next page.

	Phase	Description of the process
1	**Becoming familiar with the data**	Transcription (if necessary) and reading of data, noting initial ideas
2	**Generating initial codes**	Coding of interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code
3	**Searching for themes**	Collating codes into potential themes, gathering all data relevant to each potential theme
4	**Reviewing themes**	Checking if the themes work in relation to the coded extracts and the entire data set, generating a thematic 'map' of the analysis
5	**Defining and naming themes**	Ongoing analysis to refine each theme, and the overall story the analysis tells
6	**Producing the report**	Selection of compelling extract examples, final analysis of selected extracts, relating analysis back to the research questions and literature

Table 8: Phases of thematic analysis, as outlined by Braun and Clarke (2006)

Thematic analysis has been termed a 'within-method' tool (i.e. an approach used as part of a broader analysis approach), rather than as a method in itself (Braun & Clarke 2006). However, Braun and Clarke (2006) have advocated for its position as a method of qualitative analysis, and this is the approach that has been taken in this study. The flexibility afforded by thematic analysis – it is not wedded to a particular theoretic framework – also makes it a useful tool for early career researchers (Braun & Clarke 2006). For this thesis, a realist approach to analysis was employed, meaning that the experiences, meanings of those experiences and the broader realities of respondents were reported, interpreted and reflected in analysis (Braun & Clarke 2006).

In thematic analysis, as in other forms of qualitative analysis such as grounded theory (Strauss & Corbin 1990)[74], raw data (in this case transcribed passages from recorded interviews) are open coded – that is, grouped into like subjects or perspectives and given labels that were later refined and condensed into thematic groups – in order to break down, examine, compare and categorise the data. This process forms part of analysis as it enables the organisation of data into meaningful groups (Tuckett 2005). Buyer and agent data sets were analysed separately, then compared to reveal patterns and divergences[75]. As analysis continued, codes and categories were refined, enabling the emergence of prominent attitudes, claimed behaviours and perspectives. As in grounded theory, precision is increased when comparisons of data lead to further sub-division of a concept (Strauss & Corbin 1990). For example, strong consumer interest in provenance was recognised as a prominent theme during analysis, and was then divided into sub-themes according to the reason for that interest (i.e. the intrinsic / financial *value* of good provenance, or its use as an indicator of agent ethics).

During thematic analysis, some themes will be discarded or reported as less significant if there are not sufficient data to support their inclusion or prominence (Braun & Clarke 2006). For example, initial interviews with buyers pointed towards a strong relationship between Aboriginal art purchasing and travel, with all of the first four respondents raising, unprompted, the issue of buying art whilst visiting remote parts of Australia. This issue had not been anticipated as a defining feature of purchase choice, but during analysis it become clear that, for these respondents, it was. As a result of this discovery,

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[74] For example, a number of buyer respondents discussed their desire to 'doing something good' for Aboriginal people, and saw buying art as a way of doing so. Passages of text were coded as 'Altruism / support of Indigenous culture', and this label was used to guide discussion (see Chapter 5).

[75] For example, when comparing perspectives of buyers and agents on consumer interest in artwork provenance, it became clear that there was a discord. Whilst the majority of buyers claimed great interest, a number of agents claimed that their customers had little interest in provenance.

a new question was incorporated into the topic guide for buyers. It asked buyers whether they would be willing to pay for ‘art tourism’ trips to remote communities. This question was designed to test whether there may be a market development opportunity for remote Art Centres or agents to host visits for art buyers seeking a different kind of purchasing experience[76]. However, future respondents did not emphasise a connection between travel and art buying, as the first few respondents had. Willingness to pay for an art tourism experience was mixed and ultimately there was insufficient interest expressed by the sample to warrant further investigation or for this finding to feature prominently in this thesis[77].

The use of qualitative analysis software can streamline the tasks associated with data handling (Tesch 1990; 1991, in Morison & Moir 1998). However, due to the small samples used in this phase of research (two samples of 10 respondents each), it was not considered necessary to use software to conduct analysis. Instead, data was coded manually, using written notes and highlighted passages of text to indicate potential patterns (Braun & Clarke 2006) and concept maps and tables to arrange raw data into categories and sub-categories. This approach proved more than sufficient in developing, organising and interpreting thematic patterns within the data.

The main themes interpreted from this process of analysis are described in detail in Chapters 4, 5 and 6 of this thesis, and here in brief:

- Two consumer profiles were identified, the ‘decorator’ and the ‘collector’, and knowledge levels differ between the two;

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[76] Whilst not within the scope of this thesis’ research questions, identifying market development opportunities is an integral part of the AEP and this question was asked for that reason.
[77] This is not to say that there is not buyer interest in art tourism, merely that it was not a central theme identified. Certainly, further exploration of this market development opportunity would be worthy.

- Buyers of Aboriginal and Torres Strait Islander art are, polygamous in their loyalty to agents (or retail outlets), as they are to brands (Sharp 2010);
- Whilst aesthetics is central to the decision-making of most buyers, there are secondary criteria such as provenance, altruism or emotional connection that also contribute to purchase choices;
- Many buyers have difficulty assessing product quality in this market, and consumers with greater product and market knowledge, and therefore higher involvement levels, have a greater capacity to perceive variations in price and quality;
- Buyers are interested in provenance, either in terms of its value (either financial or intrinsic) or as an assurance of agent ethics, and there is a relationship between knowledge levels and perceptions of provenance issues;
- The majority of Aboriginal and Torres Strait Islander art buyers are either unaware of the Indigenous Art Code's existence or, if they are, do not utilise it as an information source when making purchase choices.

Because the qualitative buyer and agent samples selected for this study were small convenience samples, intended to draw out prominent issues and themes, they are not intended to be generalisable to the broader population of Aboriginal and Torres Strait Islander art buyers, as the quantitative sample was. The purpose of this phase of research was to gain a deeper understanding attitudes and claimed behaviours considered during the quantitative phase.

Secondary data sources

The Aboriginal and Torres Strait Islander Art Economies Project, of which this research is part, conducted a national survey of commercial agents in early 2013. Invitations to participate in the AEP *Value Chain Survey* were sent, by email, to approximately 340 art businesses, comprising 260 private art businesses (galleries and agents)[78] and 80 public Art Centres and galleries (Woodhead 2013). The survey was loaded into survey software package Qualtrics and was available for completion (from February to July 2013) by following a link sent by email. Approximately 50 private art businesses contacted had ceased trading – coded if their phone number was disconnected or they self-declared. The total number of responses to the *Value Chain Survey* was n=139 (Woodhead 2013).

The author contributed to the development of the *Value Chain Survey*, designing questions for agents regarding their buyers that mirrored the art fair consumer survey, enabling triangulation and bolstering the validity of findings with a broader cross-section of agents. The results of the national survey correlated strongly with the results of this thesis, and relevant findings are referenced where appropriate in the findings chapters.

[78] It should be noted that the *Value Chain Survey* was sent to a broad gamut of 'private art businesses', encompassing high end galleries through to retail outlets in tourist centres selling mostly merchandise.

Reflections on methodological issues

Claimed versus actual behaviours

Auger and Devinney (2007) argue that traditional survey methods can be poor measures of actual behaviours, and that choice experiments which force respondents to 'trade off' product attributes lead to more reliable results. In relation to this thesis' second and third research question these issues hold relevance. Nevertheless, this research did utilise 'traditional' survey methods, such as rating scales measuring both intention to purchase and self-report of recent purchase behaviour, for the following reasons:

- Pragmatic limitations: I began this thesis whilst enrolled within the David Unaipon Centre for Indigenous Education and Research, where my supervisors had expertise in qualitative but not quantitative research, and certainly not in marketing science. The methodology was devised whilst enrolled there, and at that time I was only minimally aware of reliability issues with self-report survey data and had not heard of choice experiments. I then moved to the Ehrenberg-Bass Institute for Marketing Science, where I learned of a range of methodological issues relevant to my thesis. However, by that time data collection had commenced and additional choice experiments were not possible.
- Lack of prior research: despite the limitations of claimed behaviour data, given there is so little research on consumption in the primary market for Aboriginal and Torres Strait Islander art, claimed behaviour data is a vital first step in understanding consumer choice in this market. Future research can build upon this data using alternative methodologies.

Social desirability bias

As discussed in the Literature Review, social desirability bias can create distortions in research findings (Bruner & King 2000). It is likely that social desirability bias influenced the responses of buyers surveyed and interviewed for this research, particularly in relation to respondents' perceptions of provenance and ethical consumption of Aboriginal and Torres Strait Islander art. This issue has been taken into account during data analysis and inferences made during discussion sections.

Limitations of ranking questions

Upon reflection, the purchase criteria rank order survey question described earlier in this chapter would have been more robust had it been designed as a rating scale or multiple response, as the ranking format does not enable analysis of the importance placed on each criterion by the respondent, and can be harder for the respondent to interpret and answer. Despite this, rank order questions do challenge respondents to consider 'trade-offs' among more or less desirable alternatives (Johnson 1974) and through this question I was able to draw conclusions about claimed purchase criteria in this context. I can be confident of the veracity of the findings because of their correlation with the 'intention to purchase' rating scale.

Chapter summary

This chapter has outlined the methods employed to answer the key research questions. It began by describing the two-tiered mixed methods research design and sampling frames chosen, then described the design and testing of data collection instruments and methods of data analysis. It concluded with an outline of methodological issues and limitations relevant to this thesis.

Chapter Four: Consumer profiles and purchase characteristics (RQ1)

This chapter presents and analyses the results from both quantitative and qualitative data collection, to address this thesis' first research question. It begins with an outline of the demographic profiles of survey respondents, and then broadens the analysis of consumer profiles to include attitudinal and behavioural profiles, incorporating qualitative data. The next section analyses purchase characteristics, using both quantitative and qualitative data. The chapter concludes with a summary of findings relevant to RQ1.

Overview

This chapter presents findings relevant to the first research question:

RQ1: *What are the profiles and purchase characteristics of consumers in the lower and middle price tiers of the primary market for Aboriginal and Torres Strait Islander art?*

RQ1 is addressed in two sections:

- A description of the demographic characteristics of the quantitative sample (Darwin Aboriginal Art Fair 2012 (n=460), the Cairns Indigenous Art Fair 2012 (n=324) and Desert Mob 2012 (n=90));
- Quantitative and qualitative data is then analysed together to develop an understanding of consumer profiles and purchase characteristics in terms of attitudinal and claimed behaviour data. Qualitative data tests and ultimately corroborates quantitative findings.

The first section, describing demographic profiles of buyers, contributes baseline data of import to industry stakeholders, such as agents and government funders. Due to the lack of prior research in this area, it was necessary to collate this data in order to see whether statistically significant demographic patterns would be revealed. Ultimately, there were no statistically significant findings and limited insight could be drawn from demographic results. However, this is, in itself, a finding (albeit an unexciting one), and the results do provide industry with current data on demographic profiles that will be useful for agents in targeting buyers with greater accuracy. It was the second section – which discusses consumer profiles and purchase characteristics in terms of attitudinal and claimed purchase behaviour – that makes the strongest contribution, both to industry and in terms of existing literature on consumer choice.

In the demographic profile section of this chapter, only quantitative data is presented. As discussed in Chapter Three, demographic profiles were not collected during qualitative data collection; this data was analysed thematically, according to prominent patterns and themes (Braun & Clarke 2006). Below are the quantitative findings relevant to the demographic profiles of visitors to DAAF, CIAF and Desert Mob, in 2012. Comparisons between each art fair revealed very similar results, and for this reason the three fairs have, almost exclusively, been analysed together, using a Many Sets of Data (MSoD) approach, which allows for the testing of 'significant sameness' (Bound & Ehrenberg 1989) in results across different data sets.

Consumer profiles: Aboriginal and Torres Strait Islander art buyers in the primary market

Demographic profiles

Gender

The gender distributions across the three fairs were closely aligned[79], revealing strong female representation in each data set. Of the total responses (n=874), 75% were female. This was consistent across the fairs, with females accounting for 77% of responses at DAAF, 70% at CIAF and 80% at Desert Mob. The gender profile documented in CIAF's 2011 and 2012 Evaluation Reports were consistent with these findings, with females accounting for 76% of total visitation in 2011 and 78% in 2012 (Queensland Government 2011, 2012), and the DAAF 2011 Evaluation Report, which reported 75% female attendance (Young & Collins 2011)[80].

Neither DAAF nor Desert Mob conducted their own visitor surveys in 2012, making it difficult to measure the representativeness of the three data sets. However, the DAAF 2011 Evaluation Report claimed that visitors in that year were "predominantly middle-aged women" (Young & Collins 2011, p.8) and the 2012 CIAF Evaluation Report also reports demographic profiles consistent with this thesis' findings (Queensland Government 2012). Both these reports utilised survey instruments to collected basic demographic data only.

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[79] No statistically significant differences were found between fairs.

[80] It is possible that gender bias may have been introduced due to the fact that all members of the research team conducting the surveys were female (Polit & Beck 2008).

Age distribution

Respondents were asked to indicate their age range, selecting 18-35[81], 36-50, 51-65 or 66 years and over[82]. Cumulatively, across the three events, the highest percentage of respondents was aged between 51 and 65 (38%), followed by those aged 36-50 (30%). DAAF and Desert Mob showed very similar results in terms of the distribution of age ranges, whilst CIAF showed a variation in the middle age brackets, (36-50 and 51-65), with a higher proportion of 51-65 year olds than the other two events. The DAAF 2011 Evaluation Report correlates with these findings, with 75% of respondents aged between 36 and 65 (Young & Collins 2011), and the CIAF 2011 Evaluation Report reported 64% of visitors between the ages of 30 and 59 (Queensland Government 2011). In 2012 CIAF reported 55% of visitors were aged between 40 and 59 (Queensland Government 2012).

		Frequency	Percent
Valid	18 – 35	212	24
	36 – 50	260	30
	51 – 65	328	38
	66 or over	68	8
	Total	868	100
Missing	System	6	
Total		874	

Table 9: Age distribution across the three fairs.

[81] People under the age of 18 years were not eligible to complete the survey, as on the whole, they would be unlikely to be engaged with the art market because of their age and consequent lack of disposable income.
[82] These age groupings were based upon standard ABS segmentations.

Home Postcode

"Although the global marketplace offers incredible opportunities to sell, the buyers may be geographically dispersed" (Causey 2009, p.170). It is therefore important to understand the geographic location of buyers of Aboriginal and Torres Strait Islander art. Respondents residing in Australia were asked for their home postcode. 93% of respondents, overall, lived in Australia[83]. The 7% that were international are discussed below.

The place of residence (nationally) varied significantly between fairs, with the largest group at each event being from the city in which the event was held (Darwin, Cairns or Alice Springs). Interestingly, these groups were of similar sizes across all three events - 38% of respondents were from Darwin at DAAF, 30% were from Cairns at CIAF and 38% were from Alice Springs at Desert Mob. These results demonstrate a strong local visitation at each event. However, the spread of home postcodes across all other Australian states and territories also demonstrates national attendance, and indicates the representativeness of this sample in capturing the geographic diversity of the Aboriginal and Torres Strait Islander art-buying public.

The greatest diversity of home postcodes occurred at DAAF, with strong representation from Melbourne and wider Victoria, Sydney and wider New South Wales, the wider Northern Territory, Queensland, Western Australia and South Australia (see Table 10 on the next page). The majority of CIAF respondents were either from Cairns or wider Queensland (73%), demonstrating a stronger local visitation than either of the other two events. This finding correlates with that reported in the CIAF 2012 Evaluation Report,

[83] During analysis, states and territories with a large number of metropolitan postcode responses (such as Sydney and Melbourne) were recoded into separate groups in order to differentiate between metropolitan and regional respondents. This was important in order to understand the geographic spread of attendees at these events – if the geographic spread had been limited, the national representativeness of the sample would have been less.

which reported 83% visitation by Cairns or wider Queensland residents (Queensland Government 2012). After local Alice Springs residents, the largest groups of visitors to Desert Mob were from Melbourne (11%) and South Australia (11%).

Postcode	Fair data is from (%)			Total
	DAAF	CIAF	Desert Mob	
International	7	8	4	7
ACT	2	1	1	1
NSW excl. Sydney	10	4	7	8
NT excl. DWN & Alice	9	1	7	5
QLD excl. Cairns	6	35	6	17
SA	3	1	11	3
TAS	1	1	4	1
VIC excl. Melbourne	5	2	1	4
WA	5	2	0	3
Sydney	6	3	7	5
Alice Springs	1	1	38	5
Cairns	0	38	0	14
Darwin	39	1	3	21
Melbourne	7	4	11	7
Total	460	324	90	874

Table 10: The table above shows the distribution of home postcodes at each fair. The final column shows the total percentage of respondents from each location, overall. Where large groups were from a particular city, that city was recoded and is shown here.

International respondents

Of the 874 respondents across all three fairs, 7% lived outside Australia. Of that 7%, the largest groups were from Europe (17%) with France and Belgium being the most represented countries, the United Kingdom (15%) and New Zealand (15%), followed by The United States (9%). Whilst there is no directly comparable data available to correlate with these findings, cultural tourism data collated by the ABS in 2011 stated that 22% of international 'cultural heritage visitors'[84] had attended festivals, fairs and other cultural events, and 20% had experienced Aboriginal art, craft and cultural displays, indicating a broad international tourist interest in Australian cultural events. In addition, results from the AEP *Value Chain Survey* indicated that international private buyers accounted for 13% of all commercial sales, according to the 139 agents who responded[85] (Woodhead 2013). Respondents were asked to estimate the percentage of sales by country between 2008 and 2012. Europe was by far the largest group, accounting for 65% of sales. However, respondents expected growth to be in the Asian and North American markets (Woodhead 2013), indicating a potential shift in the purchasing patterns of international buyers. This may be reflective of wider trends in the international art market, which are seeing a proliferation of art fairs in the Asian region and a rapid rise in consumption by Asian art collectors (Azimi & de Changy 2013).

Profiles and purchase characteristics of international buyers are discussed in more detail later, drawing upon qualitative data.

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[84] Cultural heritage visitors are defined by their participation in at least one of the following activities or experiences during their trip to Australia: attendance at a performing arts event, a museum or art gallery, an art and/or craft workshop or studio, a festival, fair or similar cultural event, an Aboriginal art, craft or cultural display, an Aboriginal site or community or an historical and/or heritage building, site or monument.

[85] There were 12 survey respondents who indicated they were located outside of Australia, however, which may have skewed these results.

Buyers / non-buyers

Survey respondents were asked whether they had ever purchased a piece of Aboriginal or Torres Strait Islander art before[86]. The majority (78%) of respondents across the three fairs had purchased before, indicating that the majority of visitors to DAAF, CIAF and Desert Mob are, in fact, buyers, and therefore representative of the target population.

The results in this section enable an increased understanding of the demographic makeup of visitors to each art fair, which may be representative of the broader Aboriginal and Torres Strait Islander art buying population. However, as previously noted, whilst important for the industry in understanding who visits these events, demographic data did not shed significant light on buyers in this market. However, attitudinal and claimed behaviour data, both quantitative and qualitative, did. This data enabled rich descriptions of consumer profiles and purchase characteristics, and is discussed in the next section.

Attitudinal and claimed behavioural profiles

There was no deliberate attempt to recruit specific age, gender or location-based groups for the qualitative buyer interview sample, as these constraints were extraneous to this thesis' core objectives and irrelevant in such a small sample. Interviews, therefore, focused on achieving a depth of understanding of buyers using attitudinal and claimed behaviour measures and a thematic analysis approach.

[86] This question divided the samples in two, with non-buyers skipping the next nine questions, and being directed to the last section of the survey, whilst those who answered 'yes' went on to respond to nine questions about their purchase history before completing the last section.

Agents were asked to describe their customers in order to achieve triangulation with consumer data. Many found it difficult to describe their client base in terms of over-arching demographics[87], saying that their clientele was too diverse to do so. A few catered to specific demographic groups (such as one agent in Sydney who reported that her clientele were mostly upper middle class women local to the Eastern suburbs) but this was rare. Most concurred that the majority of their clients were domestic. Exceptions were an agent who catered to European buyers, and the two international agents interviewed. Ultimately, there was no consensus in terms of demographic profiles and, as already noted, the most interesting results reveal attitudinal and motivational characteristics of buyers.

Consumer portraits: decorators and collectors

Two consumer 'portraits' were raised by agents interviewed – the 'decorator' and the 'collector' – with each varying in their purchase intentions and behaviours. Decorators, it was said, are guided by the needs of their interior space and generally have little product or market knowledge, whilst collectors have more specific tastes guided by their knowledge of Aboriginal and Torres Strait Islander art. Some agent perspectives on the decorator market are below:

> *We get a lot of people who have a specific size, shape, colour, theme…and the piece has to fit a particular space or a particular décor.*
>
> *These are people…who think it would be nice to have some Aboriginal art in their house, because it sounds like it could be trendy or they think they might be doing the right thing for the Aboriginal art community.*

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[87] Agents who did describe their customers in demographic terms usually mentioned age ranges and work status. For example, "working professionals between the ages of 40 and 55", "baby boomers" or "doctors and lawyers". One agent commented that the demographic makeup of his client base had become older over the years as Aboriginal art had become more expensive.

> *The market is geared towards people who want something that works over their sofa and under their air conditioner.*
>
> [My clients are] *'yuppies' – people with an apartment or a nice house, who want something nice to put on their wall and look at.*
>
> *People want to decorate their homes, really.*

One agent described the primary market overall as "unsophisticated, a decorator market", with many buyers lacking art knowledge generally. Another felt that buyers with little knowledge of Aboriginal and Torres Strait Islander art often choose "accessible" works that have been stylistically validated within the art market and are instantly recognisable as Aboriginal art[88].

One agent described collectors as those willing to buy high quality works "in styles that are new to the market", reflecting their interest in the art 'movement' broadly, and in advancements in artistic expression. This view correlates with one buyer interviewed, who was perhaps the most committed collector in the buyer sample – she owned the most works and had curated her collection into a touring exhibition. When asked what drew her to her most recent purchase, she described it as "conceptually mind-blowing" and "exciting intellectually" because it represented an innovative shift in the artist's practice. However, many agents felt "the market is very much for decorator art", and that "committed" collectors were a minority within their client base. This is reflective of the market segment this research is concerned with – at the higher end of the primary market one would expect there to be many more collectors.

[88] For example, as Eric Michaels has written, "dots label and authenticate desert acrylics for the European viewer" (Michaels 1988, p.65). In other words, patterns or styles that are familiar to the European viewer (and Michaels is referring to Western viewers here) are easier for some buyers to accept. Art that challenges accepted notions of what Aboriginal art looks like may be more difficult for these buyers to comprehend.

These comments are reflective of varying levels of consumer involvement – both enduring category involvement (Richins & Bloch 1986) and purchase decision involvement (Mittal 1989) – and their influence upon consumer choice. Those less involved (the decorators) (Ismail & Barber 2008) had less sophisticated preferences, whilst those with increased knowledge and higher levels of involvement (the collectors) had a greater capacity to appreciate quality (Zeithaml 1988) and to refine their preferences (Friswell 2010).

These findings support a broad segmentation of Aboriginal and Torres Strait Islander art buyers, with 'collectors' at one end (Belk 1995), 'decorators' or 'tourist art' buyers at the other (Nelson 1982), and mid-range buyers still somewhat ill-defined in between (Burns 2013). It also suggests a relationship between a buyer's usage of the product category of Aboriginal and Torres Strait Islander art, and their intellectual or conceptual engagement with products in that category. Once again, this is unsurprising – one would expect that buyers who commit personal or financial investment over a period of time to a particular product category would exhibit higher levels of enduring engagement with that category (Ismail & Barber 2008). Even situational involvement (specific to a purchase decision) (Mittal 1989) is arguably greater for Aboriginal or Torres Strait Islander art purchases – rather than consumer goods purchases – due to the infrequent and relatively costly nature of such purchases.

Some comments on international buyers

As discussed in the literature review, there has historically been considerable ambivalence in the international reception of Aboriginal art (McLean 2011, p.170). Writing in 2011, McLean (2011) felt that Aboriginal art was yet to be accepted overseas as contemporary art. Two international agents were interviewed during the qualitative phase in order to understand how their customers viewed the art, and what they purchased. One agent owns a gallery in the USA, another in France, reflective of the market share of these countries (Woodhead 2013).

The French agent felt that European buyers often prefer paintings that are "neat" – tightly or intricately patterned – because they equate neatness with great technical skill: "there is a meticulousness that people like". This agent posed that traditional Western perceptions of quality craftsmanship may influence Aboriginal and Torres Strait Islander art consumption in the European market – art that evidently takes a lot of time to create (because it is detailed or requires mastery of a skill) "must be good". He also thought that "[French] people still struggle with bark paintings", because they relate to them as primitive artworks – they "remind them of African art, and that does not feel like contemporary art". This supports McLean's theory above.

The French agent sold works predominantly within France, but also across Europe, and described consumers from different countries as having different stylistic tastes. In Germany, he said, they like 'brushier' more expressive works; in England and Australia people like vivid colour; in France people are not interested in vivid colour and prefer more subtle tones; in Switzerland people respond to austere abstraction. The American agent, whose clients were usually American too, said most of her clients "like lots of color and dense patterns, or abstract contemporary-looking work" – particularly larger scale paintings. These preferences are distinctly different from the French tendency towards smaller works and may be reflective of America's 20th century art history, which was dominated by abstraction (Jeffri 2005).

The French agent also explained that French people (and Europeans more broadly) have different attitudes towards material possessions than people in Australia. In Australia, he proposed, people often live in large homes and are very happy to renovate and restyle, getting rid of possessions and starting again with a 'new look'. In France, he said, people usually live in small apartments or houses, hold on to family heirlooms and display them in their homes, so they have less ability to continue purchasing new objects. These tendencies, which he feels are culturally ingrained, have a direct impact upon both the volume and nature of his sales, with most purchases being 'one-off' and small. This idea of culturally distinct ways of living in the home is supported by Woodward (2003), whose study of interior decoration in Brisbane found that cultural and individual identities can be managed through the display of objects in a domestic space. This finding has implications for both the volume of sales of Aboriginal art to France, and the type of artwork – large paintings may be difficult to sell in the French market.

Whilst these are the subjective opinions of two respondents, they provide an insight into culturally distinct stylistic preferences that would be worthy of further research, especially in light of ongoing – and only moderately successful – attempts by both governments (through trade delegations and funded exhibitions) and various Art Centres and agents to understand and enter international art markets.

Consumer purchase characteristics

In order to capture consumer purchase characteristics both survey and interview respondents were asked about past purchases, and about a particular recent purchase. Quantitative and qualitative results are presented in this section. Results reveal a great diversity of purchase characteristics, though commonalities were also clearly evident.

Recent purchase data (survey sample)

Survey respondents were asked to recall a range of characteristics pertaining to their most recent purchase[89], enabling measurement of respondents' claimed behaviour in relation to a number of variables:

1. Approximate year of purchase;
2. Artwork medium;
3. Artwork price;
4. Purchase location;
5. Criteria used to make the purchase choice;
6. Knowledge of artwork provenance;
7. Importance of artwork provenance to purchase choice.

They were also asked about their purchase behaviour and history more generally:

A. Range of purchase locations used to buy;
B. Most frequently used purchase location;
C. Estimated lifetime spend on Aboriginal and Torres Strait Islander art.

[89] Asking respondents to recall a particular recent purchase mitigates the risk of recollection or faulty recall bias (Erdfelder, Brandt & Broder 2007; Guilbault et al. 2004), though given the infrequency of many art purchases some bias may have occurred.

1 – 4 and A – C above are discussed below[90].

Year of most recent purchase

Survey respondents were asked the year of their most recent purchase[91] (which could include a purchase they had made at the fair that day), enabling an understanding of inter-purchase intervals (Zetu et al. 2003) which, as could be expected in the context of art consumption, were relatively long, with many respondents having made their last purchase more than a year earlier.

Of those who had purchased Aboriginal or Torres Strait Islander art before, the majority (57%) listed 2012 as the year of their most recent purchase. The next largest group (17%) listed 2011 as the year of purchase, followed by 2010 (9%), indicating that the majority of the buyer sample (83%) had made their last purchase between 2010 and 2012. This suggests that 83% of the buyers in this sample were either currently or recently actively purchasing. This finding correlates with qualitative data, which found that the majority of recent purchases were made within the last three or four years. It also confirms that inter-purchase intervals are relatively extended (Zetu et al. 2003), with implications for the incomes of Aboriginal and Torres Strait Islander artists and agents.

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[90] 5 will be discussed in Chapter Five and 6-7 in Chapter Six.

[91] The design of the survey instrument did not allow differentiation between those who had purchased that day and those who had purchased on another date within 2012. However, the purpose of this question was to understand the extent to which the sample were currently engaged in the primary market for Aboriginal and Torres Strait Islander art and, therefore, it was not vital to know the exact date of purchase.

Mediums and geographic regions

Acrylic paintings on canvas or linen were by far the most commonly purchased medium across both quantitative and qualitative samples. Survey respondents were asked to select from a list of 10 options (painting on canvas, painting on bark, work on paper, wooden sculpture or carving, pottery / ceramic, glass, fabric / clothing, jewellery, merchandise, weaving) the medium of their most recent purchase. Averaged out across the three fairs, paintings on canvas were the most common medium (47%), followed by works on paper (11%) and fabric or clothing (10%). When compared with the AEP *Value Chain Survey* (Woodhead 2013), the popularity of paintings on canvas or linen is confirmed – agents reported that paintings made up 75% of their total art sales in 2011-12.

Differences between the fairs did exist, reflective of the more popular modes of production in each location. For example, there is a strong printmaking tradition in Far North Queensland. Works on paper accounted for 17% of CIAF responses to this question; the second largest group. In Darwin, fabric or clothing (13%), weavings (11%) and wooden sculptures or carvings (11%) also featured prominently in the results for that fair, perhaps reflective of the long-standing traditions of creating woven and carved objects in Northern Australia. There is also a growing screen-printing industry developing at many Art Centres in the Northern Territory, also represented in the DAAF results.

The popularity of acrylic paintings was reiterated during qualitative interviews. Apart from one buyer, who purchased mostly three-dimensional works, all interviewees began talking about their art purchases without first mentioning that the purchases were paintings – this was assumed. Many buyers and agents sited Central and Western Desert paintings as a focus[92], and some said they had begun buying paintings from Central Australia, indicating that these works may serve as an ‘entry point’ for many into the market. However, only one respondent had chosen art from a particular geographic region across all her purchases, suggesting that buyers eventually broaden their geographic focus. Agents concurred that acrylic paintings were the most popular medium with their customers. One agent felt that the physical fragility of bark paintings turns buyers off (as this makes them more difficult to transport and care for), correlating with the view of the French agent. This is supported by the lack of bark painting purchases reported by both samples – no interview respondents, and only 4% of survey respondents, claimed a bark painting as their most recent purchase.

A number of conclusions and implications can be drawn from these results, aside from acrylic paintings being the most popular medium. There is a relationship between the purchase location and the medium, or product type, purchased – product availability impacts upon consumption trends. Products such as bark paintings or large carvings are difficult and expensive to transport, and thus may be sold more frequently close to their place of production. This likely has a direct impact upon the products purchased by consumers in different locations. Another conclusion is that consumers are attracted to styles and mediums reflective of their local environment or local Aboriginal or Torres Strait Islander traditions, particularly in areas like Darwin, Cairns or Alice Springs.

These results have practical implications for Aboriginal and Torres Strait Islander artists. Whilst many artists work in the medium of acrylic paint on

[92] The *Value Chain Survey* (Woodhead 2013) also reported that artworks from the Central and Western Deserts were by far the most common products in terms of procurement by agents, indicating that the popularity of these regions in terms of purchasing may be reflective of product availability.

canvas, many do not – artists, communities and Art Centres have developed myriad artistic traditions, from woven objects to ceramics to carved funerary poles. These results suggest that artists working in mediums other than acrylic paint on canvas are at a market disadvantage[93].

Price tiers

Survey respondents were asked to indicate the price range of their most recent purchase[94]. The largest group (39%) had spent between $1 and $200, followed by 31% who had spent between $201 and $500 and 23% who had spent between $500 and $2,000. Only 8% had spent more than $2,000. 51-65 years old were the largest group in each price tier – probably demonstrative of their increased financial capacity – and no statistically significant relationships were found between age and amount spent.

Interview respondents reported slightly higher levels of spending than survey respondents, but the majority can still be characterised as low and mid price tier buyers, using the price tier definitions applied to this thesis. There were two respondents whose spending ventured into the top end of the market (up to $50,000), but they were a minority. Conceptions of price limitations and 'value' varied quite significantly between interviewees, with one respondent claiming her "usual" price range was $5,000 to $10,000, her "expensive" pieces $20,000 and pieces under $2,000 "usually [bought] as gifts", whilst another respondent felt that anything over $500 would be more then he was prepared to spend:

> *A lot of the stuff I really like is, understandably, pricey…good art generally is not really affordable for me.*

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[93] A diversity of mediums and styles is central to an enduring interest in this art and to a resilient market, and it is certainly not recommended that all artists paint on canvas in order to satisfy market demand.

[94] Answer choices were: $1-200, $201-500, $501-2000, $2001-10,000, $10,000 and over.

This finding supports the view that perceptions of value in relation to ‘luxury’ products are different for different consumers, even in relation to the same products (Wiedmann, Hennigs & Siebels 2009). It was also noted by two respondents that initially, when they first started buying, they spent less, but as they have become “more interested”, have started spending more:

> *You become more selective and feel more confident about what you’re buying.*
>
> *What I’m finding now is I’m buying fewer, more expensive pieces.*

Survey respondents were also asked to estimate their lifetime spend (to date) on Aboriginal or Torres Strait Islander art purchases, selecting from the price brackets in Table 11 on the next page. The largest group (33%) estimated their total lifetime spend as between \$2,000 and \$10,000, followed by 28% who estimated between \$501 and \$2,000. 4% of respondents estimated their lifetime spend as above \$50,000.

		Frequency	Percent
Valid	$1-200	60	9
	$201-500	103	15
	$501-2,000	188	28
	$2,001-10,000	217	33
	$10,001-50,000	73	11
	$50,001-500,000	18	3
	$500,000 or over	8	1
	Total	667	100

Table 11: Distribution of responses regarding lifetime spend on Aboriginal or Torres Strait Islander art.

A cross-tabulation of age range and lifetime spend across the three fairs indicated that again, 51-65 year olds were the biggest spenders in every price tier except $1-$200, in which they were second to 18-35 year olds. 36-50 year olds were almost as strongly represented in the $2,001-$10,000 price bracket. These results are what we would expect from such an analysis, and correlate with wider trends in consumer spending across age groups – older buyers generally have more discretionary income than younger buyers (Gunter 1998) and have simply had more time to make purchases.

All buyer interviewees were asked to estimate the number of Aboriginal or Torres Strait Islander artworks they owned[95], and responses ranged from 2 to 130, though the majority owned less than 20 pieces, indicating that purchases are relatively infrequent. The infrequent buyer may rely upon a range of intrinsic and extrinsic quality cues – such as seller reputation

[95] Due to a survey design oversight, survey respondents were not asked how many pieces of Aboriginal and Torres Strait Islander art they owned, so this qualitative data cannot be extrapolated or compared to a larger population of buyers.

(Delmastro & Castriota 2012; Shapiro 1982) or practical considerations such as price, size and colour scheme (Hansen 2005) – in the absence of strong product or market knowledge (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982). Respondents with larger, more considered collections could generally identify a stylistic or conceptual link between their artworks and could be termed collectors, according to the definition of collectors as those who selectively acquire a certain ‘set’ of things (Belk 1995), and supporting the earlier discussion of collectors as engaged and involved (Mittal 1989).

Whilst it is not possible to determine longitudinal or habitual spending from these results, it is reasonable to assume that the spending reported above may be indicative of wider purchasing habits. As well as demonstrating that the majority of Aboriginal and Torres Strait Islander art buyers purchase in the lower and middle price tiers of the market, the results in this section indicate that buyers purchase infrequently at best, or as a ‘one-off’ at worst, with implications for the economic returns to artists. Whilst there are myriad other reasons for the downturn in the market, such as brand damage, over-supply, dodgy dealers, etc. (Boland 2011b, 2011a; Liston 2011; Wilson-Anastasios 2011), these findings also suggest that low purchase frequency and low spends also affect market health.

Purchase locations

Results from both quantitative and qualitative data collection indicate that a majority of buyers purchase Aboriginal and Torres Strait Islander art from both Art Centres and commercial galleries, reflecting a shift in the traditional market mechanism of commercial agents serving as the primary mediators between Art Centres and buyers. Few interview respondents expressed resolute adoption of one purchase method over another, supporting the idea that consumers are polygamous in their loyalty, whilst utilising a limited repertoire of brands (or agents, in this case) to make their purchases (Ehrenberg, Uncles & Hammond 1995; Sharp 2010).

Respondents in both samples were asked where they had purchased Aboriginal or Torres Strait Islander art. The survey utilised a multiple response question design, and the answer choices were:

- Commercial galleries (in person);
- Commercial galleries (online);
- Art Centres (in person);
- Art Centres (online);
- Art fairs;
- Privately – through a friend / colleague / acquaintance;
- Auction houses;
- Internet – eBay, online auction (type of website was requested);
- Other[96].

Results across the three fairs were again similar. The majority had purchased through Art Centres (67%), commercial galleries (46%) and art fairs (53%), unsurprising given the sampling frame. Only 6% had purchased through an Art Centre's website, indicating that the majority of buyers who had purchased from Art Centres had visited them in person, despite their mostly remote locations. This finding may be indicative of the locations of each art fair – all cities with relative proximity to remote areas, compared with urban centres like Melbourne or Sydney. 24% of respondents had purchased a piece of Aboriginal or Torres Strait Islander privately (either through a friend,

[96] An oversight in the design of this question was the lack of inclusion of 'directly from artists' as an answer choice. A number of respondents wrote this in the 'other' section.

colleague or acquaintance), but only 4% had purchased from an auction house, demonstrating a preference for primary market purchases and reiterating the representativeness of the sample. 3% had purchased Aboriginal or Torres Strait Islander art on the Internet (see page 150 for further discussion of online purchasing).

Survey respondents were then asked: 'If you have purchased multiple items of Indigenous art or craft, which of the following purchasing methods below would you say you use the most?' They were asked to tick one box only. This question was asked in order to establish the most popular purchase locations (or type of agent) among the sample.

		Frequency	Percent
Valid	Commercial galleries	79	12
	Indigenous Art Centres	276	43
	Privately	50	8
	Art fairs	138	21
	Auction houses	6	1
	On the Internet	6	1
	N/A (no multiple purchases)	94	15
	Total	649	100

Table 12: Distribution of most frequently used purchase location.

The results from this question are similar to those from the preceding question, with Art Centres listed as the most frequently used purchase method (43%), followed by art fairs (21%) and commercial galleries (12%), again demonstrating a preference for Art Centres. This could again be explained by the strong local representation at each event, the relative proximity of Darwin, Cairns and Alice Springs to remote Art Centres and the fact that the events are Art-Centre focused. Consumers in these locations would, most likely, be both more aware of the operations of Art Centres, and have greater access to them. Had the survey been conducted in Sydney or Melbourne, a higher proportion of respondents may have chosen 'commercial galleries' as their most frequently used purchase method[97].

Most interview respondents had also made their most recent purchase through a commercial gallery or in person at an Art Centre. For some, buying from an Art Centre reflected a desire to support artists through purchase choices. As one respondent said:

> *I'm always quite pleased to give my money to the Art Centres, because you feel you're at least contributing something to the welfare of those people.*

Another respondent explained that she likes dealing with Art Centres, but also wants to support commercial galleries. She also expressed the view that high quality work is usually sold through commercial galleries:

> *If I want a good piece, I normally don't bother going to an Art Centre.*

This comment refers to the traditional market mechanism of commercial agents serving as mediators between remote Art Centres and largely city-based buyers, with Art Centres often reserving their best works for dedicated exhibitions in metropolitan galleries. From the prevalence of Art Centre purchasing within both buyer samples, consumers increasingly prefer to buy directly 'from the source', visiting remote communities themselves. This has a range of implications for the wider Aboriginal and Torres Strait Islander art market, relating to consumer perceptions of Art Centre provenance, of non-Art Centre provenance and of commercial agents, and the effect of those

[97] This issue is described in the Limitations section of Chapter Seven of this thesis.

perceptions upon the overall resilience of the primary market. These issues are discussed in full in Chapter Six.

Online purchasing

The findings of Smith, Discenza and Baker (2006) and Quesenberry and Sykes (2008), namely that consumers prefer to see an artwork in person before making purchase decisions, were reiterated in this thesis' results. Whilst a number of buyers interviewed used the Internet as a research tool when considering purchases (Quesenberry & Sykes 2008), few purchases were finalised online. Only 3% of survey respondents claimed to have purchased Aboriginal or Torres Strait Islander art online. Of that 3%, the majority specified eBay as the site they had used. Only 1% claimed that the Internet was their most frequent purchase method.

Similarly, most interview respondents expressed reticence about online purchasing, especially in terms of online-only art galleries and auction sites. Most thought it would be preferable to purchase through the website of a 'bricks and mortar' gallery than through an online-only gallery or auction site, which most were dubious about – even if they weren't able to articulate why:

> *I'd be nervous about that. I'd like to know that they were…I don't know, I'd just be nervous about it. Probably unreasonably I suppose.*
>
> *I definitely like to see it…I like that feeling of touching it and I like to see what I'm getting.*
>
> *I have to see it* [in the flesh].

Only one interview respondent had purchased Aboriginal art through an online-only auction site (Grays Online), and explained his choice in relation to provenance – he had researched the source of the work as stated by the vendor and believed it to be verifiable. This particular site has, on occasion, been used by reputable auction house Deutscher & Hackett to sell works not selected for their physical auctions, and provenance information, including certificates of authenticity, is detailed on the website. This respondent cited these facts in explaining his belief that Grays Online was a "trusted online auction house". His attitude was:

> *As long as there are good images online, and the piece has good provenance, there really is not much difference between looking at it online and looking at it in the flesh.*

He was, however, alone in these views, and all other respondents held negative perceptions of online art galleries selling Aboriginal or Torres Strait Islander art. Most expressed a generalised anxiety about buying products online generally (Gongan & Qi 2009; Othman et al. 2013). A number of respondents did say they would purchase a work sight unseen through the website of a commercial agent or Art Centre, reiterating quantitative results, but only if they had an established and trusting relationship with the agent. One respondent indicated that as long as he knew the website was "authentic" he would be comfortable with purchasing online. When asked how they would ascertain that authenticity, the respondent said he would have to rely on word of mouth regarding that seller's reputation, supporting the view that reputation is one quality cue buyers use to make purchase choices (Delmastro & Castriota 2012; Landon & Smith 1998; Shapiro 1982).

The views of agents triangulate those of buyers, with the majority reiterating that customers primarily used their website as a research tool, and most sales were still finalised in person or by email / phone. Most agreed that only regular customers purchase sight unseen online, and even then it is not common. Agents were asked whether they felt there was a price ceiling in terms of online spending. There was no consensus on this, with some saying buyers would not spend more than $1000, whilst others felt the price ceiling would be higher. Only one agent appeared to be engaged in social media in an active way[98].

Whilst it is outside the scope of this thesis to address the proliferation of online art consumption contexts[99] and the extreme variance between them in terms of quality and reliable provenance, online purchasing is a growing issue for all art markets and presents both significant threats and opportunities. Further research would be of great benefit to the sector.

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[98] This agent used Instagram and Facebook as marketing tools, and said that sometimes sales would occur through these channels, with customers contacting her to purchase a piece they had seen on the gallery's Instagram feed. This was rare, however – the majority of agents were not utilising social media to advertise their products, perhaps indicating a missed opportunity.

[99] Another researcher is addressing this area as part of the Aboriginal and Torres Strait Islander Art Economies Project.

Chapter summary

This chapter addressed this thesis' first research question, establishing that demographic profiles do not reveal significant insights into the profiles of buyers in the lower and middle price tiers of the primary market, but they do provide data of use to the industry. Attitudinal and claimed behaviour data established some over-arching consumer profiles (the decorator and the collector), which support a broad segmentation of buyers according to involvement and knowledge levels (Ismail & Barber 2008; Mittal 1989; Richins & Bloch 1986). The findings in relation to purchase locations indicate that consumers are polygamous in their loyalty to agents, as they are for brands (Sharp 2010). Purchase characteristic data (in terms of medium, region and location of purchase, and usual spend) reflect existing market data on product supply (Woodhead 2013), and suggest there are broad commonalities amongst buyers in the lower and middle price tiers.

Chapter Five: Criteria used to evaluate purchases (RQ2)

This chapter presents and analyses the results from both quantitative and qualitative data collection, to address this thesis' second research question. It begins by describing some broad art market issues relevant to RQ2, then discusses key purchase criteria, using both quantitative and qualitative data. It then briefly outlines the criteria least important to buyers. The chapter concludes with a summary of findings relevant to RQ2.

Overview

This chapter presents finding relevant to the second research question:

RQ2: *In their evaluations of Aboriginal and Torres Strait Islander art products, what criteria are used by consumers in the lower and middle price tiers of the primary market to make purchase choices?*

Quantitative and qualitative results are discussed concurrently wherever possible, with qualitative data providing depth of understanding to quantitative responses. Qualitative interviews, which allow the researcher to question and clarify interviewee responses, revealed nuances in purchase criteria and enabled a deeper understanding of the decision-making processes of buyers. As in Chapter Four, the three quantitative data sets were analysed together using an MSoD analysis approach, and qualitative data was analysed thematically.

Art market issues affecting consumer choice

Before discussing the purchase criteria of buyers, some broad contextual issues affecting consumer choice in this market are discussed. These issues were raised in the literature review and were reiterated during data collection.

Supply and demand

One prominent theme identified during the interview phase[100] was that of a perceived mismatch between supply and demand in the primary market, and a sense that this was having a detrimental effect upon artwork quality:

> *I suppose I wonder how much art the market can sustain… As there's a proliferation of Art Centres and a proliferation of works, you wonder whether that market, in the future, will be able to…whether the number of works will devalue the art a bit.*

Others concurred:

> *How many of these works will find a home and how long can that happen for?*
>
> *It's getting too prolific.*

One buyer felt that paintings in the lower and middle price tiers (under $5,000) often had a similar 'look' – and seemed mass-produced or "churned out":

> *I don't get that same buzz* [as when looking at high end works]. I *don't even have the words to say why that is but I just don't feel those works are of that same quality. It's almost like, perhaps the emotion of the artist isn't there to create something that's so meaningful; it's more a production process.*

[100] Each interview included a general question for the interviewee about their perceptions of the Aboriginal and Torres Strait Islander art industry. This question was included to allow respondents to articulate issues of importance to them. Some respondents felt they had already talked sufficiently about their views on a range of issues and declined further comment. Others, however, readily expressed a range of views.

She went on to say that there's nothing "intrinsically wrong" with people producing art for a tourist market:

> *We have no right to be judgmental…there are advantages to that over just being on the dole, which must come with feelings of not accomplishing anything, despair and uselessness.*

Some agents concurred that buyers were concerned about oversupply, adding that the idea that if you're an Aboriginal person of a certain age living in a remote community "you're going to be a gun artist" is a fallacy that has "partly fuelled the over-supply"[101]. This agent felt that "Art Centres are partly to blame", explaining that Aboriginal art of varying quality is "everywhere", and "it just gets to a point where [people] don't want to look at it anymore". Whether Art Centres and other agents have a responsibility to restrict the number of mediocre works entering the market to preserve the rarity value of fine art, or if providing income for artists, often living in poverty, is more important, has been raised before:

> *When Aboriginal art prices are falling at auction and canvases are stacking up in Art Centres and galleries, is it better to protect an artist's provenance and brand – and art collectors' valuations – or is it more in a living artist's interest to give them an on-going source of income?* (Eccles 2012).

This quote echoes the tension between artistic integrity and economic return (Jennings, in Liston 2011) raised in the literature review, and confirms that over-supply of works in the lower and middle price tiers is a perceived issue for the buyers interviewed.

One buyer interviewed felt there was a way to preserve the integrity of the fine art market, whilst also providing an income for lesser artists. She felt a

[101] Whilst not possible within this thesis, an investigation of supply side issues affecting consumer choice would be a natural and worthy complement to this thesis' findings, triangulating consumer purchase data with agent offerings and artistic production.

clearer differentiation between ‘tourist art’ and ‘fine art’ in agent marketing practices would help:

> *Going forward, we need a way to separate the Indigenous arts and crafts market – a nice souvenir from a holiday reminds people of country and has a sentimental attachment. It’s a good thing and, well marketed, gives people something to do for their dole money. But we need a way to separate that from the true art. And I think that’s what commercial galleries actually do quite well.*

This is an ongoing issue for the Aboriginal art market (Myers 2002). These perspectives resurfaced throughout the interview process, supporting literature that suggests there is an oversupply of mediocre works on the market (Bendor, von der Heidt & Acker 2013).

Impact of varying product quality and pricing

Following on from the previous discussion, buyers have some difficulty assessing product quality in the Aboriginal and Torres Strait Islander art market. Some agents reported that buyers find it difficult to differentiate between good and bad artworks, sometimes even if they have considerable knowledge, because (like in all art markets) “works can be very appealing” without being of high quality. This supports the theory that consumers require knowledge to perceive variations in product quality (Zeithaml 1988).

Pricing disparities in the primary market further compound this issue. Agents who sell works below market value ultimately undermine an artist’s reputation and damage consumer confidence (Albrecht 2012). Buyers with limited market knowledge will understandably wonder why they should pay a higher price through one agent, when they can pay less elsewhere, creating low price anchors in the minds of consumers (Ariely 2008). Similarly, when low quality works are sold for high prices, perhaps at similar prices to high quality works by the same artist, it becomes even more difficult for consumers to judge quality (Zeithaml 1988). As one buyer stated during our interview:

> *It's hard sometimes to distinguish between really valued art and not so valued art.*

This buyer claimed that he had seen Aboriginal artworks that appeared very similar to him for wildly different prices through different agents, making him wonder:

> *Is it the same artist or someone painting like the artist? There are lots of questions…*

These results indicate that consumers with greater product and market knowledge have a greater capacity to perceive variations in price and quality (Zeithaml 1988). Quality is a difficult term to define (Steenkamp 1989; Zeithaml 1988), and lower quality products, which can be great value if their price and quality are aligned (Wong 2005), are necessary market entry points for new buyers. However, these findings indicate that some buyers are dissatisfied with the product quality available (Bolton, Warlop & Alba 2003) and feel poor quality works are damaging the brand of Aboriginal and Torres Strait Islander art (Boland 2011a).

Agents interviewed reiterated these views. One admonished agents whose pricing does not reflect the quality of the works they offer, suggesting that this contributes to consumer misperceptions about product quality. As Ariely (2008) has noted, price anchors can have a relatively long term effect upon our willingness to pay for related products. For example, if a buyer is initially exposed to Aboriginal art in a 'clearance sale' environment, where works are priced below their market value, that buyer may, in the future, baulk at higher prices in another environment, even if they reflect the market value of that artist's work. As discussed in the literature review, market value (especially in the lower and middle price tiers of the primary market) can be difficult to ascertain, as works in these tiers seldom reach the secondary market, where market value is usually set (Boys 2013). Thus, consumer perceptions of ‘price fairness’ are largely shaped by past prices paid and the prices set by others (Bolton, Warlop & Alba 2003). Thus, price perceptions may be highly subjective (Monroe 1973). As Bolton, Warlop and Alba (2003) have found, this subjectivity of price perceptions and wildly divergent prices set by different agents for similar products contributes to buyer-seller conflict, mistrust, and consumer dissatisfaction. This certainly appears to be the case in the lower and middle price tiers of the primary market.

Furthermore, as one agent noted, people love to get a bargain (Yeoman 2011), and often do not ask the pertinent questions to obtain all available information (Sharp & Romaniuk 2004), such as “why is an apparently great work by a great artist selling so cheaply?” This respondent saw the disparity in pricing structures as a huge problem for the art market, lamenting that as long as it continues, people will see Aboriginal and Torres Strait Islander art as “cheap”. This respondent felt that secondary market auction houses are mostly to blame, with works often being sold at the low end of an already low estimate. Advertisements like the one on page 72[102] exemplify this issue. These ‘clearance style’ auction houses market works as ‘bargains’, encouraging a sense of complicity with buyers who, by purchasing through the auction, will be getting the better of commercial galleries – positioned by the auction houses as unnecessary middle men. Whilst these “low quality providers may advertise and prosper” (Parker 1995), such market positioning runs contrary to the traditional fine art market principles of scarcity and

[102] As a reminder, this advertisement promoted a sale of Aboriginal art and asked readers ‘why pay gallery prices when you can buy at market prices?’

exclusivity, presenting Aboriginal art as something that can, and should, be purchased cheaply[103].

One agent explained that some of her clients "have the feeling that it might not be rewarding [financially] to do the right thing and buy ethically." They may have seen works priced very low, when they have paid more through an ethical gallery. She cited some collectors who have "given up" because they don't "trust anybody anymore… Probably there were too many contradictions for them, and they lost their confidence completely." These findings demonstrate that variations in pricing and product quality also have implications for ethical consumption in this market. These issues are more fully explored in Chapter Six.

Impact of product size and price

Practical considerations such as the size and price of a painting obviously impact consumer choice, and this was raised during buyer and agent interviews. One agent described small (30 x 30cm) paintings as "more commercial, decorative wall art", and usually appealing to a different buyer than larger works[104], which are purchased by people who are "happy to spend the money, but need it to fill the whole wall." She understood this inclination to pay more for a larger piece to be about self-expression through the purchase of a large painting – it can be their "signature painting". However,

[103] Again, lower quality and lower priced works are necessary in any market, as they enable new and inexperienced buyers to enter that market. However, the price and quality ratio must be aligned in order for those works to be 'good value' (Wong 2005).

[104] In terms of popular sizes, one agent claimed that paintings of 90 x 150 cm are the most popular size purchased through her gallery. Another, whose clients were generally upper middle class, believed that many of them would be more likely to pay $3,500 – 4,000 for a painting of 100 x 200 cm than $1,200 for a painting of 90 x 60 cm, because "it won't fill the wall and it feels too expensive…" This agent also noted that small canvases are often painted by 'emerging' artists, because Art Centres usually reserve larger canvases for more established artists. Similarly, commercial agents are less likely to consign large, expensive works by unknown artists, if they are of lesser quality or have not been tested on the commercial market. This suggests that the agents who regulate supply ultimately influence consumer choice.

often these clients make one large and expensive purchase, and do not buy again. Previous studies have found that some buyers prefer ‘average sized’ paintings to large ones, as they fit more easily within one’s home (Lim, Tressler & Webber 2008). Renneboog and VanHoutte (2002) saw as evidence of an optimal size for paintings. More likely is that people have limited space in their homes for art. Space limitations are of course also relevant to the *number* of artworks a buyer can purchase:

> *It becomes a matter of how much you can fit in the house, really. I’ve bought quite a few big paintings and there’s a limit to how many big walls I have. So I think size is probably the limitation.*
>
> *My house is pretty full…*

The other obvious limitation upon continued consumption is availability of resources with which to purchase. Some respondents indicated that they would love to spend more if they had the funds, but said that in reality their discretionary spending on art is very limited.

The discussion above outlines some practical issues affecting consumer choice, and particularly their intentions to continue purchasing – issues of obvious relevance to the sustainability of the Aboriginal and Torres Strait Islander art sector.

Consumer purchase criteria

Centrality of aesthetics to purchase choices

Aesthetics was central to the purchase choices of the vast majority[105] of survey respondents, and this was reiterated during qualitative interviews with buyers and agents. Consumers also use a range of secondary purchase criteria to make purchase choices, evidenced below. One survey question asked respondents what would be important to them if they were 'intending to purchase', and the other measured their actual claimed purchase behaviour in relation to their most recent purchase[106]. The claimed purchase criteria data are discussed first, followed by the 'intention to purchase' data.

Survey respondents (buyers only) were asked to rank, from 'most important' to 'least important', 10 purchase criteria in relation to their most recent purchase[107]. 1 indicated 'most important' and 10 indicated 'least important'[108]. The table on the next page displays the percentage of times each criterion was ranked 'most important' (1) and 'least important' (10), and the percentage of times each appeared in the 'top three' and 'bottom three', in order to show the breadth of appeal of each criterion.

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[105] Aesthetics / visual appeal was ranked in the 'top three' by 70% of the survey sample.
[106] The 'intention to purchase' question was asked of all respondents at each fair (n=874), whilst the actual purchase criteria question was asked only of those who had revealed themselves as buyers. This allowed a comparison between responses to both questions, in order to test the reliability of each.
[107] It is recognised that social desirability bias (Bruner & King 2000; Davies, Lee & Ahonkhai 2012; Devinney et al. 2010; Ewert & Galloway 2009), recollection bias (Erdfelder, Brandt & Broder 2007; Guilbault et al. 2004) and the attitude-behaviour gap (Auger & Devinney 2007; Auger et al. 2010; Carrigan & Attalla 2001; Carrigan, Szmigin & Wright 2004; Carrington, Neville & Whitwell 2010; Devinney et al. 2010; Vermeir & Verbeke 2006) will all have influenced the way respondents articulated their decision-making. Nevertheless, as discussed in Chapter Three, measuring claimed behaviour was an important first step in developing baseline data regarding consumer purchase criteria in this market.
[108] Please see Chapter Three for a discussion of the criteria selected for testing.

	Aesthetics / Visual Appeal	Price	Quality craftsmanship & Materials	Demonst -ration of Culture	Subject Matter / Story	Souvenir	Artist Interest	Financial Investment	Care about ATSI issues	Personal / Professional Connection
'Most important'	41%	10%	9%	8%	7%	3%	6%	1%	9%	7%
'Least important'	2%	2%	0%	1%	1%	23%	3%	32%	3%	33%
Ranked in top 3	70%	42%	49%	37%	27%	6%	16%	4%	32%	11%
Ranked bottom 3	5%	11%	4%	7%	12%	54%	37%	83%	37%	60%

Table 13: Distribution of purchase criteria in rank order survey question. Criteria ranked 'most important', 'least important' and in the top or bottom three are all shown.

Frequencies were performed on each criterion in order to understand how many respondents ranked each as 'most important' (1). The criterion labeled 'Aesthetics / Visual Appeal' was ranked 'most important' by 41% of the sample, significantly higher than any other variable. Looking at the number of times respondents selected any other criterion as 'most important' (1), the next most used criterion was 'Good Price', ranked 'most important' by 10% of the sample, 'Quality Craftsmanship and Materials' (9%)[109] and 'I Care about Indigenous Issues' (9%). These criteria are discussed in more detail later in this chapter, in relation to qualitative interview responses.

Intention to purchase

As the claimed purchase criteria question asked respondents only to consider their behaviour in relation to their most recent purchase, it was necessary to test the reliability of their responses with the 'intention to purchase' question. Respondents were asked to rate each of the following 7 purchase criteria on a 5-point scale from 'very important' (5) through to 'not important at all' (1), in response to the question: 'If you were thinking about buying a piece of Indigenous art or craft, how important would each of these be in making your choice?'

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[109] The purchase criterion 'Quality Craftsmanship and Materials' embodies notions of excellence, both in artistic execution and materials used, and holds across a range of consumption contexts (Charters & Pettigrew 2003; Hansen 2005; Teas & Agarwal 2000; Zeithaml 1988). Whilst this criterion was ranked 'most important' by 9% of survey respondents and in the 'top 3' by 49% in the claimed purchase behaviour question, quality of craftsmanship was not raised by many buyers during the interview phase. This may mean this criterion was overstated during quantitative data collection, and that it may not have entered the minds of survey respondents had it not been available as an answer choice.

Intention to purchase criteria
“It was a good price”
“Quality craftsmanship & materials that is it well made”
“An artist with a good reputation; I would hope the work would appreciate in value”
“A piece that came from an ethical source (i.e. the reputation of the seller)”
“Something that looks good; is aesthetically pleasing”
“A piece with an interesting story attached to it”
“A connection (personal/professional) to the community the piece is from”

Table 14: Intention to purchase criteria offered.

This question addressed the attitude-behaviour gap, as the purchase criteria generally correlated with those in the claimed behaviour question just discussed[110]. This enabled analysis of both intentions and claimed behaviours. The table on the next page describes the spread of responses for each criterion across the 5-point rating scale:

[110] An oversight during the design of the survey instrument meant that the criteria used for testing do not correlate exactly with those tested in the 10-point claimed behaviour scale. Whilst for the intention rating scale a criterion specifically relating to ethical sourcing of artworks, in the 10-point claimed behaviour scale the option provided was less overtly related to ethical consumption – ‘I care about Indigenous issues and think it’s important to support Indigenous artists’. In addition, there was an option in the 10-point scale that related to purchasing art as a souvenir; this was not an option in the intention scale.

	Very important	Quite important	Somewhat important	Not very important	Not important at all	Mean
Good Price	13	43	38	5	1	3.6
Quality craftsmanship	**54**	36	10	1	0	4.4
Reputation / investment	7	13	30	34	16	2.6
Ethical source	**57**	26	10	5	2	4.3
Aesthetics	**63**	29	6	1	1	4.5
Subject matter / story	25	38	28	7	3	3.7
Personal / professional connection	25	28	26	15	6	3.5

Table 15: Distribution of responses to 'intention to purchase' survey question.

Results again show ‘Aesthetics’ to be the most important purchase criteria (‘very important’ to 63% of the overall sample, mean of 4.5). ‘Ethical Source’ (57%, mean 4.3) and ‘Quality Craftsmanship’ (54%, mean 4.4) followed closely behind. Overall, these results have the same rank order as the claimed behaviour results, though the ‘distance’ between criteria is less overt. Whereas for the claimed behaviour question aesthetics was the most important criterion (far ahead of any other answer choice at 41% compared to 10% or less for all other criteria) there was only a 9% difference between the first and third most important criteria in the intention rating scale, as demonstrated above. The reasons for this may be multiple, but one hypothesis is that, when asked to describe intentions respondents provide socially desirable answers (Bruner & King 2000; Davies, Lee & Ahonkhai 2012; Devinney et al. 2010; Ewert & Galloway 2009). This may at least partly explain the high percentage of respondents who rated ‘Ethical Source’ as ‘most important’. Another explanation may be the oversights in the design of the claimed behaviour question (see footnote on preceding page), which precluded respondents from selecting an option directly relevant to the ethical purchasing of Aboriginal and Torres Strait Islander art.

No statistically significant relationships were found between ‘Aesthetics / Visual Appeal’ and age, amounts spent on most recent purchase, medium purchased or lifetime spend. This criterion is clearly valued across price tiers, types of artworks and demographic groups, meaning that aesthetics are central to most purchase choices. A significant relationship ($p<.03$) was found between ‘Aesthetics / Visual Appeal’ and perceptions of the importance of provenance, with 17% of those who ranked ‘Aesthetics / Visual Appeal’ as ‘most important’ also claiming it was not important to them to know where the seller sourced the piece. Davies, Lee and Ahonkhai (2012) found that consumers are “selectively ethical” when purchasing luxury (as opposed to everyday) goods, with many considering a range of other criteria to be of greater importance when making irregular, potentially costly purchases. This construct may apply here.

Aesthetics were also central to the purchase choice of buyers in the interview sample, though conceptions of aesthetics varied. Some expressed quite simply the visual appeal of their purchases:

> *We did buy those pieces for their appearance.*
>
> *I’m happy to just go with the way they look and the fact that I really like them.*

Others spoke about visual elements such as colour and line, expressing their aesthetic interest in formalist terms:

> *It’s about line, and shape and a sense of energy on the canvas.*

We particularly loved the strong colours, the formation as well as the motifs.

[It] *jumped off the wall in terms of boldness of colour, relief and pigmentation.*

Others saw aesthetics in relation to their home interior, saying they were attracted to pieces that suited their home and furnishings, and provided a point of interest within a room:

I liked the colours and the tones, which sort of suited my home and my décor.

It brightened up the wall.

Some buyers felt their aesthetic appreciation of their art purchases was holistic, supporting the theory that it can be difficult to make attribute-based assessments of hedonic products like art (Hirschman 1983):

I don't know that it's ever just the colours; it's the whole thing.

Aesthetics is clearly paramount for most buyers when making purchase choices. This is unsurprising, given art has always been appreciated for aesthetic, hedonic reasons (Hirschman 1983; Hirschman & Holbrook 1982; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Townsend & Sood 2012; Wertenbroch & Dhar 2000). These findings also reiterate research conducted by Lim, Tressler and Webber (2008), which indicated that it is likely that buyers "are primarily interested in aesthetic issues" and Belk and Groves (1999), who has noted the importance of aesthetic taste to purchase choices in the Aboriginal art market. The fact that other purchase criteria were also found to be important suggests that, whilst art may be evaluated subjectively by some, based upon a range of intrinsic, holistic or intangible attributes (Hirschman 1983; Hirschman & Holbrook 1982; Hoyer & Stokburger-Sauer 2012; Lagier & Godey 2007; Wertenbroch & Dhar 2000; Wiedmann, Hennigs & Siebels 2009), distinct attributes are also considered and evaluated by the consumer (Davies 2006; Johnson 1974). This is discussed further in the next section.

Secondary purchase criteria

A range of secondary purchase criteria – or quality cues (Hamlin 2010; Ismail & Barber 2008; Lockshin & Hall 2003; Richardson, Dick & Jain 1994; Teas & Agarwal 2000; Verbeke & Ward 2006; Yuan 2005; Zeithaml 1988) – were used by buyers in order to evaluate their purchase choices. The importance of different criteria varied between respondents.

Provenance

Provenance was important to around three quarters (71%) of buyers surveyed and was raised by a number of interview respondents as a key consideration[111]. For some, the importance of good provenance was integral to any Aboriginal or Torres Strait Islander art purchase, and inextricably entwined with the ethical treatment and fair remuneration of artists:

> *I wouldn't like to feel that someone was in a sweatshop type arrangement where they were being paid 20 cents to produce a piece of art that was being sold for ten dollars.*

Survey results indicated that 71% of respondents found provenance important when making purchase choices and, looking at the results from the claimed purchase criteria ranking question, 70%[112] also found aesthetics important. These results do not tell us which would 'win out' in a situation where a buyer could not have both attributes (aesthetically pleasing and ethically sourced). Similarly, during buyer interviews, respondents claimed to have great interest in provenance, but were just as interested in the aesthetics of their purchases.

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[111] It is recognised that social desirability bias may have influenced this finding (Bruner & King 2000; Davies, Lee & Ahonkhai 2012; Devinney et al. 2010; Ewert & Galloway 2009).

[112] Ranked in the 'top three' purchase criteria.

Thus, a further question was asked of interviewees in order to tease out this issue. When asked if he would purchase a work he'd fallen in love with, aesthetically, if he had doubts about the conditions under which it was made, one respondent admitted it would be a battle between "the devil and the angel on my shoulder". He added, referring to a private art dealer who has received considerable attention in the media and within the art world for his dealings with Aboriginal artists:

> *Some people see him as the devil incarnate…I'm prepared to believe bad stories about him, but if you put a Bill Whiskey* [a prominent artist who sells work through this dealer's gallery] *in front of me…I'd probably be biased to…you could pick up the convenient side of his reputation.*

Conversely, another respondent claimed that he would not buy a piece of Aboriginal or Torres Strait Islander art if he could not ascertain good provenance. "That would be that." Comments such as these indicate that, when trade offs are necessary to make purchase choices (Hansen 2005; Johnson 1974), consumers vary in their allegiances.

Altruism and support of Indigenous culture

As discussed in the literature review, around the time of Australia's Bicentenary Aboriginal art was popular for its apparent representation of reconciliatory or nationalist ideals (McLean 2011). Buyers (almost always non-Indigenous) could satisfy their "desire for post-colonial redemption" (Fisher 2012, p.251) through its purchase. Less cynically, purchasing Aboriginal or Torres Strait Islander art may reflect an interest in, and concern about, socio-economic issues affecting Indigenous peoples.

These sentiments were raised during a number of interviews, and are embodied in the purchase criterion ranked 'most important' by 9% of the survey sample, 'I Care about Indigenous Issues'[113]. Some interview respondents articulated these concerns, with varying emphases. Whilst some openly expressed a sense of guilt in relation to Australia's colonial past, others termed the altruistic element to their purchasing in terms of current social issues facing Aboriginal and Torres Strait Islander communities:

> [If I can help] *foster their creativity and their connection to their country and all the good positive things that can come out of that… Giving young people a future, those things are really important I think.*
>
> *We feel we get something out of it, and we hope we're contributing to sustaining and providing a livelihood for people in small regional and remote areas.*

One respondent said that she sometimes made purchases that were almost entirely altruistic, as a means of economic support for a fledgling artist:

> *If it's a cheap piece – I'm not going to hang that, I'll give it away to a friend, who'll enjoy it, but it's not a serious piece for me to collect. It's to support that artist on the way through.*

Two buyers openly expressed a sense of "guilt" that influenced their purchase choices:

> *I sometimes wonder if there's a sense of guilt, as a way of redressing the past, acknowledging the value of Aboriginal culture. I think there's a part of me that feels that.*
>
> *I probably wouldn't necessarily think about this at the time of buying a painting but I think that…as settlers in their country we've just wrought such havoc for their lives and if I can do something small…then I'd be pleased to be able to do that. I think about that a lot, just in my day to day life, when issues are raised to do with Indigenous communities and you just think, they've lost so much and I don't think that it's retrievable.*

These respondents both qualified their statements by saying that aesthetics were first and foremost, but that the issues described above would enter into their decision-making as secondary concerns.

[113] Though general in meaning, this criterion implies reconciliation, cultural acknowledgement and altruistic or ethical support of Aboriginal and Torres Strait Islander people through art purchasing.

One agent reiterated these views:

> *I think for some people there is a bit of a guilt thing, to be honest… People can feel like they're giving back to Aboriginal communities by buying art.*

Another agent, while discussing the potential for increased overseas sales, particularly in the United Kingdom, expressed the view that overseas clients do not "feel that cultural conflict [that some Australian buyers do]." She added that many of her clients come in with "deeply embedded" negative perceptions about Aboriginal people that are "not to be overlooked". She explained that customers often say things like, "my husband doesn't like Aboriginal art", and she feels "it's more than just the art they're saying they don't like…it's bigger than that". In other words, these clients hold negative perceptions about Aboriginal people that colour their perceptions of Aboriginal art. This statement, and those above, indicates that Australia's colonial past has affected the perceptions of some buyers of Aboriginal and Torres Strait Islander art, and that an altruistic sentiment influences these buyers' purchase behaviour. These buyers could be termed 'ethical consumers', in that their purchase behaviour reflects "matters of conscience" (Cowe & Williams 2000; Freestone & McGoldrick 2008)[114].

Emotional connection and the ineffable qualities of art

Many interview respondents alluded to the ineffable qualities of art, with some finding it difficult to articulate the reasons behind their purchase choices. An emotively driven, somewhat 'illogical' element to purchase choices – the sense that one was drawn to a piece of art without really understanding why – was common throughout the interview process. One respondent, whose most recent purchase was a piece by an artist she already had in her collection,

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[114] Further research would be required to establish the actual influence of altruistic sentiments upon consumer choice, using observational data.

wondered aloud whether it might have been more “sensible” to buy something else, but explained that there was just “something” about that work:

> *It wasn’t a logical decision. It just stood out to me, which is often how I do it… I’m probably not a very sensible buyer; I’m more of an emotional buyer.*

For this respondent, the decision was complex and she found aesthetics to be inextricably entwined with an emotive response:

> *I just find those paintings very strong, very powerful… I think it was aesthetic, but I also felt…there was something about that painting that I felt drawn to. The others felt less powerful, more contrived… It just spoke to me, I suppose, it was a purely emotional response.*

For another respondent, the emotional response was combined with a pragmatic evaluation of the artwork’s price:

> *It just spoke to me and when I looked at the catalogue I found the price really reasonable.*

Sometimes this emotive response was described in relation to a sense of spirituality:

> *I don’t understand in a logical way but it can have a very strong connection and impact upon your emotions. Perhaps something within yourself that is spiritual, I don’t know.*

For buyers who had travelled to remote communities to purchase their art, or had bought art when visiting communities for work or on holiday, the emotional connection was the result of the purchase context:

> *I’ve always felt some sort of connection to the pieces I’ve bought. They’ve either really spoken to me or I’ve bought them because I’ve been somewhere, I’ve had an experience and I connect the picture to that experience.*

Another respondent, who had spent time working in the community her most recent purchase was from, knew the painting depicted the local area and thought it would be a “good keepsake from my experience there”. She had also spent time with the artist, which cemented her purchase decision.

Another, who had recently returned from a trip to the Kimberley region, said she had already decided, before she got there, that she wanted to buy something from Warmun Art Centre. So, unless she really hadn't been able to find anything she liked, she would have bought something[115]. These findings broadly support a segmentation of buyers according to tourism activities (Nelson 1982), though these buyers also purchased outside of a tourism context. The implication of these findings is that there exists for some buyers an emotional component to purchases based upon the experience of buying the work.

Artwork story / subject matter

Arguably, aesthetic appreciation is an accessible 'entry point' to the visual language of Aboriginal and Torres Strait Islander art which, often manifesting ancestral stories and depictions of traditional lands inscrutable to the average buyer, can be difficult to interpret or 'understand'. As one agent who sells primarily to a wealthy inner city Sydney client base put it:

> *They want something lovely to put in their homes – primarily they're driven by the aesthetic. It's easier for them to buy from an aesthetic point of view than an Aboriginal art point of view.*

63% of survey respondents claimed an artwork's subject matter or story would be 'very important' or 'quite important' to a purchase choice, and 27% ranked it in their 'top 3' purchase criteria in relation to their most recent purchase.

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[115] This connection between art purchasing and tourism was expressed by a number of respondents early in the interview process, prompting the addition of a question to the topic guide about consumer willingness to pay for combined art and tourism experiences. This question was asked in recognition of the Aboriginal and Torres Strait Islander Art Economies Project's aim of developing new markets and opportunities for artists. However, during the remaining interviews, respondents expressed only average interest in the idea of paying for travel experiences to remote communities that included an element of art appreciation. Many felt the costs would be prohibitive, and others felt they could coordinate their own trips to remote places, and did not need or want a structured tour to assist them to do so. However, as this was a side issue to this thesis' core research objectives, the topic was not exhaustively explored and should not be taken as a reliable indication of broader consumer sentiment.

Interviews added depth to this result, indicating that subject matter or story can be important to a buyer, even if they don't really understand it, or make little effort to find out:

> *I believe they* [Aboriginal artworks] *tell a story, I'm not sure what the story is, but yeah…*
>
> [For me] *it has to have a meaning…like a story, which I know a lot of Aboriginal art has…*
>
> *They refer to a culture that has strong spiritual aspects and even though I don't understand it I acknowledge that.*

Lim, Tressler and Webber (2008) have suggested that because buyers in the secondary market are more likely to buy high-priced works for investment, spiritual significance and ancestral stories depicted are less important to them. The idea that consumer interest in 'stories' and 'meanings' decreases in the higher price tiers correlates with the views of buyers interviewed. Generally, those who purchased less expensive pieces appeared more concerned with an artwork's story and meaning than those who generally spent more money and purchased more pieces. There were exceptions to this, with one dedicated collector taking an encyclopedic approach to her collection, consciously purchasing works representing particular ancestral stories by particular artists. As she said of her most recent purchase:

> *I've got every one of Linda's stories except that one; so it was a real nice add to my collection.*

These results may reflect the influence of product category involvement (Mittal 1989) upon consumer choice. A buyer who is minimally involved with Aboriginal and Torres Strait Islander art may seek an inexpensive piece, and given their lack of knowledge of the art and the culture it is from (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982), may rely upon the artwork story provided with the work (or described by the agent) as an accessible entry point and a 'value add' for their purchase. Consumer interest in artwork 'stories' may also be indicative of the fact that certificates of authenticity often include a description of the story told in the artwork, as well as information about the origin of the work. This information may signal quality to a buyer, akin to country of origin product labeling in other product markets (Verbeke & Ward 2006), such as the wine market.

Price (value)

The idea of a 'good price' calls to mind notions of value; the correlation between the amount paid for something and its intrinsic worth. That a piece of art is a 'good price' is of course entirely subjective, a fact that was reiterated during buyer interviews. As discussed in Chapter Four, buyers had differing notions of value, with some feeling that $500 was the maximum they would be prepared to pay for an artwork, and other seeing a $2,000 painting as a "cheap" piece. One interviewee said she had never found an Aboriginal painting in the price range she can afford, that she likes "enough" to buy[116]. She felt that there was a "similarity" to the paintings in her price range (up to $3,000) and had a sense that these works have "just been produced in a mass sort of way", which made her cautious. For this respondent, the limitation of price has influenced her choices – her understanding and recognition of quality in higher priced, higher quality pieces, influenced her choice not to buy less expensive, lesser quality pieces (Zeithaml 1988). This supports the literature advocating for an alignment between price and quality (Wong 2005) to avoid consumer dissatisfaction (Bolton, Warlop & Alba 2003).

Least important purchase criteria

The quantitative phase of data collection also sought to understand the criteria *least* important to respondents. The criteria ranked most often as 'not

[116] This respondent's small collection was made up of inexpensive sculptural pieces (fibre works, etc.).

important at all' were 'Personal / Professional Connection' (33%), 'Financial Investment' (32%) and 'Souvenir' (23%). The criterion 'Personal / Professional Connection' was included as an answer choice in anticipation of a large number of respondents involved in the remote Aboriginal and Torres Strait Islander art sector (for example, Art Centre managers present at the fairs). It is a positive result in terms of the representativeness of this sample that this criterion was listed as 'not important at all' by 33% of respondents, as this suggests that this potential bias did not skew the sample. 32% of the sample claimed it was 'not important at all' for an artwork to be a financial investment. Given the price tiers in which the majority of the sample had purchased their most recent piece (93% had spent under $2,000), and their lifetime spends (85% had spent less than $10,000 in total), this result is unsurprising – buyers purchasing in the lower and middle price tiers of the primary market are not likely to be buying for investment. The criterion 'Souvenir', ranked 'not important at all' by 23% of respondents, correlates with the small proportion of international respondents (7%), and the high proportion of locals at each fair (between 30% and 38%).

Understanding the criteria least important to buyers can assist agents in understanding existing and future clients, and developing marketing strategies. For example, though a number of buyers interviewed had purchased art whilst engaging in what could be called tourist activities, buying Aboriginal or Torres Strait Islander art as a souvenir was not considered important to the quantitative sample. Whilst the wording of the survey question may have influenced this result, this may also indicate that buyers are interested in genuine engagement with Aboriginal and Torres Strait Islander people and communities, rather than a superficial engagement through the purchase of a 'souvenir'. This may present opportunities for enterprising agents. These are assumptions only and would require further research to be substantiated. However, these results provide some baseline data from which hypotheses can be generated for future studies in this area.

Chapter summary

This chapter has described the key criteria used by consumers in the lower and middle price tiers of the primary market to make purchase choices, finding that aesthetic appeal was central to the purchase choices of most buyers. Further, echoing the findings of Woodward (2003), and literature on ethical consumption (Auger & Devinney 2007; Carrington, Neville & Whitwell 2010; De Pelsmacker, Driesen & Rayp 2005; Devinney et al. 2010; Freestone & McGoldrick 2008; Vermeir & Verbeke 2006), the pleasure or emotional response provided by the purchase of art (Lagier & Godey 2007) was important to many, as was a sense of altruism, which was often raised in relation to provenance and fair treatment of artists. However, given many buyers claimed both aesthetic appeal and good provenance to be important criteria, it is likely that trade offs occur (Johnson 1974) where both attributes are not present. A range of pragmatic influences upon consumer choice was also discussed, including a perceived mismatch between supply and demand, and practical limitations such as size and price.

Chapter Six: Awareness & perceptions of provenance, available consumer information and industry regulation (RQ3)

This chapter presents and analyses the results from both quantitative and qualitative data collection, to address this thesis' third and final research question. It addresses RQ3 in three parts: firstly, consumer awareness and perceptions of artwork provenance are discussed, then perceptions of available information, and finally awareness and perceptions of the Indigenous Art Code. The chapter concludes with a summary of findings relevant to RQ3.

Overview

This chapter presents findings relevant to this thesis' third and final research question:

RQ3: *What awareness levels and perceptions exist among consumers regarding artwork provenance, available consumer information and industry regulation?*

The survey tested for consumer awareness levels and perceptions of:

- Provenance;
- Agent practices;
- Information available when making purchase choices; and
- The Indigenous Art Code.

Qualitative interviews investigated these issues in more detail, revealing nuanced consumer perspectives. Quantitative results informed qualitative data collection, and this is reflected in the presentation of results – findings from both phases are presented and discussed concurrently to communicate depth of information on each issue.

Awareness and perceptions of artwork provenance

Survey respondents were asked whether they knew where the seller sourced their most recent purchase – its provenance. 89% stated they did. Respondents were then asked whether the source was important to their purchase decision. 71% claimed it was, 17% said it was 'somewhat' important and 12% said it was 'not important at all'[117]. These results demonstrate that the majority of the sample of lower and middle market buyers had an awareness of, and interest in, provenance in relation to their purchase choices, supporting previous research on top tier and secondary market buyers (Cole 2011; Gennochio 2008; Myers 2002; Taylor & Coleman 2011; Wilson-Anastasios 2009).

Respondents raised provenance issues in the majority of interviews (over 70%)[118]. Two main perspectives were shared[119]. Less experienced buyers related provenance to ethics, suspecting that many artists were not being treated ethically by agents. This supports the idea that without good information, consumers tend to assume the worst (Johnson & Levin 1985). More knowledgeable buyers held more pragmatic views, and were less concerned about fair dealing. They instead discussed provenance in relation to artwork cost – only a major concern if they were spending 'serious money'. These perspectives are explained below.

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[117] There were no statistically significant relationships found between this group and the criteria they did find important, or with demographic or purchase characteristic data.

[118] If respondents did not raise provenance, they were asked directly whether the source of the artworks they bought were important to them. As discussed in the Chapter Three, whilst asking this question directly may have encouraged respondents to respond in socially desirable ways, it was deemed necessary to cover this issue in all interviews as provenance is a significant issue affecting the Aboriginal and Torres Strait Islander art market. As it turned out, the majority of respondents raised provenance as a concern themselves, and this question was often not necessary.

[119] Only one interview respondent claimed to have no interest in provenance. She had purchased only a handful of pieces, which she had bought "on face value". When asked whether the source of the works had been important to her purchase choices she said she had asked the seller, and that they had told her the works were from "around Alice Springs", but this was not of particular interest to her.

Provenance as assurance of financial value

Some interview respondents expressed their interest in sound provenance in terms of *financial value*. For less expensive works, provenance was less important ('you get what you pay for'), whereas for more expensive pieces provenance was valued for financial reasons.

> *It depends how much you're paying – if you're not paying much then it wouldn't worry me too much. It's a cost thing, isn't it? If it's just something you fancy and it's not very much money then you take your chances.*

Other experienced buyers concurred:

> *It depends what I'm buying. If I'm spending $20,000 – absolutely. If I'm at the Desert Mob marketplace spending $300 – probably not. If I'm buying from the Art Centre at Desert Mob chances are it's [the provenance] valid, but if it's not, on a $300 piece it's not the end of the world for me. So it's probably a bit financially driven.*
>
> *If it's under $1000 and I really like it… I would probably buy it, but if it was over that price, I'd go with provenance.*

These views did not necessarily reflect a desire to resell in the future, but a simple 'value for money' proposition – if you are spending $20,000 you want to know what you're buying. Some raised the issue of potential resale value as a reason to ensure verifiable provenance, but even then resale was only a consideration if necessary for financial reasons:

> *If the provenance is not respected you know your kids won't be able to sell it.*

Reflecting the literature on this issue (Cole 2011; Taylor & Coleman 2011; Wilson-Anastasios 2009), provenance was valued by some as an insurance against the devaluing of their purchases. These respondents (again, the more experienced buyers) felt good provenance was easily assured by purchasing through reputable agents:

> *I've only bought from very reputable places, or Art Centres, so I haven't felt an anxiety about it* [provenance]. *I like to buy where I know they are legitimate [authentic] artworks. It would just annoy me, if it wasn't.*

I wouldn't buy from any cowboy around the place.

An agent reiterated this view, saying of his clients:

> *If they've come to me they're concerned about provenance, which is how I like it.*

These comments support the theory that for buyers with an established repertoire of trusted agents (Ehrenberg, Uncles & Hammond 1995; Sharp 2010) the issue of provenance is less complicated, due to their belief in the seller's good reputation (Delmastro & Castriota 2012; Shapiro 1982). When asked how they determine a seller's reputation, these respondents variously cited industry contacts, word of mouth and their experience as buyers as ways in which they had gained confidence in agents. These results show a relationship between knowledge levels and perceptions of provenance issues, with increased knowledge often coinciding with increased confidence in purchase decisions.

Provenance as assurance of ethics

The other prominent perception of provenance related to ethical dealing and artist remuneration. Buyers who expressed these views were often less 'involved' (Ismail & Barber 2008), and for these respondents, though provenance was invoked as an assurance of agent ethics, they often felt unsure how to verify agent claims:

> *My main concern was that the artist wasn't being taken advantage of. But…how do you know, I don't know what happens.*
>
> *One of the things that worries me is the perception, which may or may not be reality…that there might be quite a few charlatans out there taking advantage of the artist.*

This correlation between lack of involvement and concern about ethics did not always hold and the respondent with the largest collection also had the most ardent views on provenance:

> *Provenance is the single most important thing; there's no grey area there for us.*

This respondent had no interest in resale, but strong interest in Aboriginal and Torres Strait Islander culture and the issues affecting Indigenous people. She firmly believed in Art Centres as drivers of socio-economic health in remote communities, and saw Art Centre provenance as the most ethical way to buy, in line with much available information on buying Aboriginal art (Australian Art Collector 2010; Circuitt 2008; Oster 2009). This raises the issue of Art Centre versus non-Art Centre provenance.

Perceptions of Art Centre provenance

Art Centre provenance is often presented as the most ethical way to buy Aboriginal and Torres Strait Islander art (Australian Art Collector 2010; Circuitt 2008; Stefanoff 2012). The issue has become polarised in the mainstream media and within arts industry circles (Rothwell 2006; Rothwell 2010; Rothwell 2012a, 2012b, 2012c). The reasons for this hinge upon the fact that for art created outside Art Centres, "complex forms of transactional relationships [exist] – some intimate, some dependent, some cynical, some exploitative" and that often "art works are exchanged for cash, [but also for] for goods…and/or services" (Stefanoff 2012).

Survey respondents were asked to indicate, on a 5-point rating scale, how important the following statement was for them: 'If I was considering purchasing a piece of Indigenous art or craft, the fact that it came from an Indigenous Art Centre would be important to me'. The purpose of this question was to gauge consumer sentiment about Art Centre provenance, in light of the polarisation of this issue discussed above[120]. 37% of respondents claimed the fact that an artwork came from an Art Centre would be 'very important' to their purchase choice. 32% claimed it would be 'quite important', 13% were 'not sure', 11% thought it was 'somewhat important' and for 8% it was 'not important at all'. The mean response was 3.8. This result suggests that survey respondents had largely positive perceptions of Art Centre provenance. Further, a significant relationship ($p<.01$) was found between the fair the data was from and responses to this question – of those who claimed it would be 'not important at all' to have Art Centre provenance, 50% were respondents from CIAF. This is interesting given CIAF data made up only 37% of the overall sample. Whilst it is only possible to hypothesise reasons for this result, it is possible that Queenslanders (73% of the overall CIAF sample) are less concerned about Art Centre provenance than buyers at DAAF and Desert Mob because unethical practices in the Aboriginal art market have occurred predominantly in the Northern Territory, not Queensland. It may also reflect the relative 'newness' of the Queensland Aboriginal and Torres Strait Islander art market compared to the Northern Territory, meaning that buyers may be less aware of these issues. Alternatively, the result may express a difference in the values of Queensland buyers.

These results, which indicate that Art Centre provenance is 'very' or 'quite' important to 69% of the survey sample, are supported by qualitative data. Many interviewees claimed they liked purchasing through Art Centres because of the direct economic return to artists and their communities:

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[120] Once again, social desirability bias may have influenced responses to this question – those who know little of these issues may have assumed there was a moral implication to the question. However, the results demonstrate generally positive perceptions of Art Centre provenance.

> *Art does seem to be something that could be really helpful to them in lots of different ways. And if I'm going to buy art then why not help those people who really need help?*

Acknowledging that agents in metropolitan galleries can also be "very caring and supportive", this respondent also said:

> *I have an expectation I suppose that* [Art Centre managers] *have been appointed by the community and that it's in their interests to represent the community.*

This view, which suggests Art Centres are more supportive of artists than galleries, was echoed by a number of buyers.

Respondents repeatedly expressed the view that purchasing through Art Centres was the more ethical thing to do. An agent agreed that "it becomes crucially important to [new buyers] that the work comes from an Art Centre" once provenance issues in the market are explained to them. This respondent claimed she had never come across a buyer who, upon learning about the ethical issues inherent to this market, would not then purchase according to ethical standards (which, for this respondent, means only purchasing through Art Centres). Another agent expressed similar views, though this respondent's decision to work with Art Centres was for market-based as well as ethical reasons:

> *To me, it has always been very important to have this link with the communities. It's one way to be sure of the provenance and the conditions in which the works have been created. It's a plus for the client. The market, with time, has become extremely complicated…it's very difficult to give people the confidence they require to buy. To me, working with* [Art Centres] *has been the key to my activity.*

Conversely, another agent who sells works from Art Centres and independent artists felt Art Centres can have "different ideas about ethics". He claimed one Art Centre stopped consigning work to his gallery because he also deals directly with independent artists. He feels this is discriminatory given not all artists can or want to work with Art Centres. Agents, he said, are in a precarious position; building relationships with Art Centres over years only to be “cut off” when new staff take over[121]. Whilst these issues are not central to this thesis’ key research questions, they reflect the divergent perceptions of Art Centre provenance, demonstrating the confusion that could be felt by consumers without finely tuned knowledge of such issues. As Sharp and Romaniuk (2004) have noted, the more uncertainties a consumer has about a product, the less certainty they will have about choosing it. Buyers, then, require reliable and accessible information to assist them in making informed purchase choices, and polarised views of industry commentators may not be assisting in conveying that information.

[121] As part of the Aboriginal and Torres Strait Islander Art Economies Project another researcher is investigating human resource management in remote Art Centres.

Awareness and perceptions of available consumer information

Perceptions of availability and reliability of information

As already mentioned, buyers across both quantitative and qualitative samples expressed uncertainty about the veracity of agent claims of ethical dealing. Survey respondents were asked whether they thought there was 'enough reliable information available to consumers about the ways different commercial agents source works'. 48% said 'no', 29% were 'unsure', 17% thought there was 'somewhat' enough and 2% said 'this is not important to me'. Only 4% said 'yes'. Of those who viewed an artwork's source as important to their purchase decision, 53% felt there was not enough reliable information available about agent practices. This indicates that more than half of those who find provenance important feel they don't have sufficient information on the sources of works to make informed choices. A number of qualitative comments were provided for this question, which almost without exception related to transparency of information regarding sales prices (particularly the amount paid to the artist)[122] or availability and reliability of provenance information:

> *Commercial agents may not be entirely candid about their dealings with artists.*
>
> *I want to know how much the artist receives.*
>
> *I would like to know exactly what the artist gets and if it* [sic] *ethically sourced.*
>
> *Buyer should be able to know price the artist was paid* [sic].
>
> *Ethical source important to me* [sic].

[122] Agents reiterated this during interviews. When asked what questions buyers usually asked when considering purchases, almost all agents claimed that the main question was, "How much does the artist get?"

Commissions and markups should be more transparent.

I buy from the artist coz 2 [sic] *many artists get exploited.*

I want to know how artists are supported.

The percentage the artist receives from each sale.

Include what percentage goes to the artist.

Percentage of price going to Indigenous artists.

Percentage that goes to artist and/community.

What percentage the artist gets.

What percentage the artist gets for the work.

When asked the same question about Art Centres ('Do you think there is enough reliable information available to consumers about the ways Art Centres source their works?'), respondents were more equivocal, with the largest group 'not sure' (32%), 28% who said 'no', 26% who said 'somewhat' and 2% who said 'this is not important to me'. This time 12% said 'yes'. The following comments were offered, demonstrating a range of perceptions:

I assume [Art Centres are] *ethical, but don't know for sure.*

I've never heard about this.

Some are very good, some not.

Things seem to be improving.

Tend to make the assumption that they are more ethical but have heard that is not always so.

The problem is not with the arts centre but with other sellers.

The high proportion of respondents who, in both questions, said they were 'not sure' may reflect social desirability bias (Bruner & King 2000), but more likely indicates a genuine feeling that the availability and reliability of information available to buyers is not sufficient to assist them in making informed purchase decisions (Shapiro 1982). These findings also suggest that uncertainty about seller reputation (Delmastro & Castriota 2012) may impact a buyer's desire to purchase (Sharp & Romaniuk 2004). However, one respondent explained that a gallery owner he purchased through told him three fifths of the sale price went back to the artist, “which I doubt”. He bought the piece anyway. Another respondent behaved similarly:

> *He seemed to know about the art and seemed to have an awareness and knowledge of the work. That made a difference. He was a good salesperson, he listened to what we wanted and went about trying to help us, but wasn’t pushy. He reassured us that most of the money went back to the artist. But it’s hard to know whether what they’re saying is true or not.*

These findings suggests that buyers who do not possess the knowledge to make an informed assessment of a seller may make face-value judgments of agents based upon how they present (Crozier & McLean 1997). Uninformed or inexperienced buyers rely on agents to convince them of their reputation and therefore the quality of their service (Delmastro & Castriota 2012; Shapiro 1982). Without doing their own research, the buyer is ‘at the whim’ of a good salesman. Similarly, ‘ethical’ agents have few additional means of convincing an uninformed buyer of their ethics. Seller reputation, then, is vitally important in assuaging consumer concerns (Crozier & McLean 1997), and from the results of this thesis, highly involved consumers rely upon the reputation of agents whilst the uninformed buyer makes purchase decisions based upon superficial judgments or ‘gut feelings’, often without much information to back those feelings up.

Reliable information, provided either by the seller or through another means, is important to simplify purchase choices and to provide buyers with a quality cue on which to base their choice (Hansen 2005). A lack of reliable and accessible information contributes to the fragility of a market, particularly one which is plagued by negative commentary (Gennochio 2008; McDermott 2008; Perkin 2006; Rothwell 2006) and problems of attribution and authenticity (De Marchi & Wilson-Anastasios 2009; Wilson-Anastasios 2011). However, simply providing information may not be sufficient to effect behaviour change (Jacoby, Chestnut & Silberman 1977); and contradictory information (such as oppositional views regarding Art Centre provenance), only reinforce consumer mistrust (Bolton, Warlop & Alba 2003).

Perceptions of Art Centre / commercial agent practices

A majority of survey respondents had purchased through Art Centres, and claimed this was their preferred purchase method[123]. This was partially reiterated during buyer interviews, though commercial galleries were just as popular with this sample. It is worth describing how buyers perceive these purchase avenues, as this reveals a continuum of knowledge about the Aboriginal and Torres Strait Islander art market (Belk & Groves 1999).

Within the survey sample there were diverse perceptions of the business practices of commercial agents and Art Centres. Respondents were asked what percentage of the retail sale price they thought an artist received when they sold an artwork through a commercial agent (commercial galleries, private dealers, etc.). This was asked in order to test respondent assumptions about the commissions taken by commercial agents, as it is often assumed their commissions are high (pers. comm. various buyers 2012). There is no regulation around the commission practices of Art Centres or commercial agents, but the standard commission taken by both is around 40%. This varies between agents and Art Centres. Both use the commission taken to fund the continuing operation of their businesses. As Table 16 describes, the two equally largest groups either didn't know what percentage the artist received (27%) or thought it was between 21% and 40% (also 27%).

[123] Commercial galleries (12%) and art fairs (21%) were also popular methods, but Art Centres were the most commonly used method (43%).

		Frequency	Percent
Valid	I don't know	227	27
	0 - 20%	118	14
	21 - 40%	223	27
	41 - 60%	194	23
	61 - 80%	67	8
	81 - 100%	7	1
	Total	836	100
Missing	System	38	
Total		874	

Table 16: Perceptions of amounts paid to artists when selling through commercial agents.

The same question was then asked in relation to Art Centres. Responses were more evenly distributed, and overall, the majority of respondents thought artists would receive more through Art Centres than through commercial agents – as Table 17 on the next page shows.

		Frequency	Percent
Valid	I don't know	210	25
	0 - 20%	29	4
	21 - 40%	78	9
	41 - 60%	227	27
	61 - 80%	219	26
	81 - 100%	67	8
	Total	830	100
Missing	System	44	
Total		874	

Table 17: Perceptions of amounts paid to artists when selling through Art Centres.

These results demonstrate buyers have only moderate knowledge of the business practices of Art Centres and commercial galleries. Whilst consumers are not expected to understand these practices in most markets, in the Aboriginal art market some buyers clearly seek information regarding artist payments (as the comments on pages 190-191 show). As one respondent astutely noted, “people are much more concerned about this issue with Aboriginal art than non-Aboriginal art”. Because of alleged unethical conduct within the Aboriginal art market, some buyers are understandably concerned about the proceeds flowing back to artists (Acker, Stefanoff & Woodhead 2012). Many interview respondents understood Art Centres to be places where artists received fair remuneration and substantial profits are returned to the community. Conversely, commercial agents were often seen as “middle men” who took a slice of the profit away from an artist. As one respondent said:

> *For me* [buying through an Art Centre] *is a lot more attractive than going into some white gallery, where probably the gallery owner is taking, I don’t know, 20, 30, 40%. If I can purchase something and the*

money goes to the artist then for me that's really far preferable, definitely. I'd much rather deal with the community outlets directly than have some middle man who's taking a slice of the action.

One respondent had heard anecdotal stories "about artists getting screwed", which is why she thinks it's good to support Art Centres. She had learned, through her time working in remote areas, that "good Art Centres are indicators of good healthy communities". These perspectives demonstrate some knowledge and awareness about the role and functions of Art Centres in remote communities. They may, however, also reflect a lack of deeper understanding of the dynamics of the art industry. Both Art Centres and commercial galleries are vitally important links in the supply chain, with commercial agents playing an important intermediary role between metropolitan consumers and remote area artists and Art Centres. One respondent, whose knowledge of the industry was evident, rejected the idea that *only* Art Centres should be supported:

I like dealing with the Art Centres, but I also want to support commercial galleries.

She added:

My perspective is that Art Centres are primarily work for the dole schemes, and primarily turn out craft for a tourist market… I don't think it's clear-cut that you should buy everything through Art Centres – 80% of what they have to sell is poor quality. I think there's a huge problem with the industry in that Art Centres don't know what they want to be… I think they tend to take a pretty 'holier-than-thou' position.

These statements exemplify a perception raised by a number of interviewees – that the quality of artworks in the primary market varies greatly, and that 'tourist' artworks are sometimes marketed as 'fine art' (Coate 2009). These views were held by more informed or involved buyers, supporting the notion that consumers require knowledge in order to perceive quality in different products (Zeithaml 1988). They also reflect a real challenge facing the market.

Art Centres and commercial agents must recognise that their roles within the supply chain are complementary in order to ensure both sustainable market development and consumer confidence into the future.

Consumer agency in obtaining good information

Consumers who ask relevant questions at the point of sale and base their purchase choices upon the sellers' compliance with a range of principles and standards are a hugely powerful force in any market (Acker 2009). This thesis found that the extent to which consumers demonstrate individual agency when making purchase choices varies considerably. Some felt it was their responsibility to ask relevant questions at the point of purchase, in order to ascertain whether the artist was treated fairly:

> *As a buyer it's my responsibility to decide what's important to me and if the artist getting a significant cut of the purchase price is important to me well that's just important to me.*

A sense of post-colonial guilt led others to probe deeply regarding the treatment of artists:

> *One of the problems you've got is a really complex tension between you, the potential purchaser, and the artist. You've got a mediator…trying to argue that they're representing the interests of the person authentically, and…as a white purchaser of art, in a position of power, because I have the money…I want to find out as much as I can…but I also don't want to be seen to be classically Western, white male interrogator, inquisitor, and convey the sense of 'Am I getting value for money here or is someone ripping me off?' So it's a bit of an interesting one to wrestle with.*

Demonstrating this sense of individual responsibility, this buyer added:

> *These are complex issues to tease out, but it doesn't mean we shouldn't continue to try.*

In order to see whether knowledge affected consumer agency levels, interview respondents were asked if there were questions they would normally ask an agent when considering a purchase. Most respondents claimed they would ask for a certificate of authenticity, though one expressed doubt about the authenticity of some certificates:

> *I know those* [certificates] *can be very dodgy, but it's still worth something.*

One buyer reported that she always asked agents for an artist biography, and "if they can't produce it then that does give me a little bit of a hesitation". By asking these questions "it becomes pretty apparent whether they really are representing [that artist] or whether they've just picked up a second hand job lot." This respondent called this "due diligence", demonstrating strong individual agency in ascertaining provenance. As proposed earlier, buyers with established repertoires of trusted agents (Sharp 2010) were generally less concerned about verifying provenance at the point of purchase. One agent explained that her long-standing clients are aware of her ethical practices and buy from her for this reason, triangulating this consumer view.

Some buyers were happy with a certificate, and as one agent said, for these buyers "any certificate would do" – after all, how is the inexperienced buyer to know the difference between a certificate from a reputable source and one from a "carpetbagger"? Another agent felt few people understand what provenance means in the Aboriginal and Torres Strait Islander art market, because "if you buy a piece of non-Indigenous art, all you'll get is an invoice, and a bio if you're lucky". For this reason he felt it was a good thing to discuss with clients, in order to increase their knowledge, and perhaps their level of agency in the future. Another felt the way some buyers understand authenticity is problematic. He has clients who ask: "If the painting doesn't come from an Art Centre, is it a fake painting?" This comment encapsulates the unfortunate polarisation that has occurred in the market - with Art Centre and non-Art Centre works pitted against each other, at the artist's expense. The perception that unless an artwork is sourced from an Art Centre it is somehow less authentic is a dangerous one. A number of agents said they spent considerable time educating consumers about the different types of provenance, and its importance.

Some agents felt buyers "agonise over wanting to do the right thing", and have "a niggle in the back of their heads that there's something they should be asking for" but if they find a piece they love with dubious provenance, often purchase it anyway (as discussed in Chapter Five). This is emblematic of the gap between attitudes and behaviours that exists in many product markets (Ajzen & Fishbein 1977; Auger & Devinney 2007; Sharp 1997), and particularly in ethical consumption contexts (Auger & Devinney 2007; Carrigan & Attalla 2001; Carrington, Neville & Whitwell 2010; Davies, Lee & Ahonkhai 2012; De Pelsmacker, Driesen & Rayp 2005; Devinney 2010; Vermeir & Verbeke 2006). As previously mentioned, some people just "love to get a bargain" (Yeoman 2011), and often do not find it pertinent to verify provenance (Belk & Groves 1999; Rentschler & Bagaric 2004) – again supporting the idea that consumers do not try hard to obtain all available product information, or even "to choose the very best from the selected group of alternatives they consider" (Sharp & Romaniuk 2004, p.334). These findings are significant in terms of the industry's efforts to assist consumers in making informed purchase choices – such as the implementation of the Indigenous Art Code. Once again, simply providing information may not be effective in supporting informed purchase choices (Jacoby, Chestnut & Silberman 1977; Shapiro 1982).

Awareness & perceptions of the Indigenous Art Code

As detailed in this thesis' literature review, the Indigenous Art Code was a key recommendation of the 2007 Senate Inquiry (Commonwealth of Australia 2007), and was introduced to regulate the behaviour of commercial agents and to assist consumers in making informed purchase choices (Australia Council for the Arts 2009; Janke & Pham 2009; Perkin 2006; Rothwell 2006). Consumer awareness and uptake of the Code was raised prior to its implementation (Acker 2009; Eccles 2009), with industry commentators noting that "the Code will have little recognition and value if consumers are neither aware of [it], nor able to use the leverage the Code provides in guiding their Indigenous art purchases" (Acker 2009). Results from this thesis suggest the majority of Aboriginal and Torres Strait Islander art buyers are either unaware of the Code's existence or, if they are aware of it, do not utilise it as an information source when making purchase choices.

When asked whether they had heard of the Indigenous Art Code, 54% of the survey sample said 'yes', though only 21% claimed to have enquired about it when visiting a commercial gallery that sells Aboriginal or Torres Strait Islander art[124]. Only 7% listed the Code as an information resource they used when making purchases. So, approximately half the sample reported a general awareness of the Code, but few actually utilised it when making purchases. 'Awareness' is the endpoint of a highly selective information-processing procedure (Foxall 2005), and messages that do filter through have at least some bearing upon purchase choices. Thus, the lack of use of the Code may reflect a lack of agency on the part of consumers (as described in the previous section), a lack of confidence in the Code's ability to distinguish

[124] It should be noted that, as this question was prompted, we would expect higher levels of affirmative responses than if respondents had been asked to name the Indigenous Art Code without assistance.

between ethical and unethical dealers (Commonwealth of Australia 2007), a lack of promotion (Haider, in Raffan 2013) or simply that consumers do not consider the Code when making purchase decisions.

A cross tabulation between perceived importance of an artwork's source and awareness of the Code showed that of the 71% who viewed an artwork's source as important, 67% also claimed to have heard of the Indigenous Art Code. Of the 12% who stated an artwork's source was not important to their purchase decision, 62% had not heard of the Indigenous Art Code, demonstrating a significant relationship ($p<.00$) between a buyer's awareness of the Indigenous Art Code and their perceptions of provenance – those who perceived provenance as important had a greater awareness of the Code. This is important as it suggests that with increased awareness of the Code, consumer perceptions of the importance of provenance may also be positively influenced.

In general, interview respondents demonstrated even lower awareness than the survey sample – only a couple of tentatively claimed knowledge of the Code:

> *Now that you've mentioned it I've vaguely heard of it; I've never seen any evidence of it, it's never been relevant to me.*

None had ever enquired about the Code when purchasing art. Some expressed interest in the Code when it was raised at interview, and asked for details[125]. One such respondent then said:

[125] This respondent said she desired assurance that the seller was doing the right thing by the artist, "but in saying that, I don't know what to look for". She wondered if there was some kind of label to determine whether an agent deals ethically with artists. I explained the Indigenous Art Code, and she was very interested. She asked for a link to the website and said she would do some further research. This respondent was intellectually engaged with the ethical issues surrounding artwork provenance, and had spent time in remote communities for her work. She saw herself as someone who would do 'due diligence' prior to purchasing an artwork. However, she had never heard of the Indigenous Art Code. This example is emblematic of other discussions had during qualitative interviews.

> *If I was more aware of that Code, I would definitely be less reticent about buying art, less ambivalent. I'd be much more likely to buy. I'd be looking for people* [sellers] *who went by that Code. I wouldn't shop in a place that didn't go by that Code.*

Another respondent agreed that strengthening the Code "to enable people to walk in with confidence [and know] that the work inside is genuine and a fair price, is important".

Agent views reflected those of buyers, with the majority (70%) claiming they were very rarely asked about the Code. One agent reported that few clients ask about it, but around half have heard of it, reinforcing quantitative findings[126]. One agent claimed, "Nobody has ever asked me about it, ever." Some felt the issue confused buyers and created "a fear, uncertainty and a doubt factor that inhibits people's desire to buy". "People don't know what it means", one said, and another agreed, "There is no recognition of it, because there is no advertising of it". The fact that the Code is currently voluntary and that membership is open to all "organisations and individuals who are engaged in commercial trade with Indigenous artists" (Indigenous Art Code 2014) has been criticised heavily within the industry, as this comment from the President of the Australian Commercial Galleries Association, Anna Pappas, demonstrates:

> *The Code allows just about anyone to join, gives a degree of respectability to the joined and casts a shadow over decent expert indigenous art dealers who refuse to join because of some members* (Pappas, in Raffan 2013, p.60).

One agent felt it was a serious issue that "many good galleries are not signatories" as this makes it "difficult for clients". He clarified that many signatories to the Code are not "carpetbaggers, but there is a mixture…they may be 80% correct and 20% dodgy [sic]".

[126] 54% of the survey sample claimed to have heard of the Code, and 21% claimed to have enquired about it when visiting a gallery.

Of the 10 agents interviewed, 6 were signatories to the Code and 4 were not[127]. One of those who was not held strong views on why they had not signed up:

> *I know I do the right thing; I don't need some governing body to tell me I am, especially not when the members of that Code do or haven't necessarily done the right thing.*

As discussed in the literature review, the Indigenous Art Code continues to divide industry stakeholders (Raffan 2013). At the time of writing the Code's efficacy in creating "consumer demand for high ethical standards" (Haider, in Raffan 2013, p.60) was under scrutiny by the sector. The findings above suggest the Code has so far been ineffective in creating such demand. A lack of promotion and a divided industry has resulted in lack of consumer awareness and minimal utilisation of the Code by consumers when purchasing Aboriginal and Torres Strait Islander art.

[127] 1 of the 4 who were not signatories was a retail store that did not primarily sell works by Aboriginal and Torres Strait Islander artists, and thus her business did not deem it relevant to become a member.

Chapter summary

This chapter has documented and analysed consumer awareness levels and perceptions of artwork provenance, available consumer information and industry regulation, particularly the Indigenous Art Code, in order to address this thesis' third and final research question. It has found that many buyers claim provenance to be important to their purchase choices (either in terms of its financial or intrinsic value or as an assurance of agent ethics) but that some agents feel buyers over-claim this interest, in terms of their actual purchase behaviour. Across both samples, buyers expressed uncertainty about agent claims of ethical dealing and pricing disparities and variations in product quality compound this issue. The theory that consumers have a tendency to assume the worst (Johnson & Levin 1985) where product information is missing was evident in these results. The majority of buyers were either unaware of the Indigenous Art Code's existence or, if they were aware, did not utilise it when making purchase choices, suggesting that either consumers do not try hard to seek out all available information (Sharp & Romaniuk 2004), or that this industry attempt has so far been ineffective in its aim of assisting buyers to make informed purchase choices.

Chapter Seven: Contributions, limitations & implications for future research

The chapter begins by discussing the contributions this thesis makes to the academic disciplines of marketing and arts management, and those of relevance to the Aboriginal and Torres Strait Islander art industry. Limitations of the study and implications arising from the key findings are then outlined, and avenues for future research proposed. The chapter ends with a summary of conclusions from the research.

Contributions

Academic

This thesis builds upon a small body of extant research on buyer behaviour in the Aboriginal and Torres Strait Islander art market. The secondary art market has historically received more scholarly attention (Coate 2009; Lim, Tressler & Webber 2008; Taylor & Coleman 2011; Wilson-Anastasios 2009) than the primary market (Belk & Groves 1999), likely due to the lack of reliable industry data described throughout this thesis. Whilst exploratory and descriptive in nature, this thesis therefore makes a significant contribution to a developing field of academic inquiry.

This thesis also extends into a new product context a number of theoretical perspectives contained within the marketing literature. Through the study of consumer purchase preferences, it supports the established theory that consumers display polygamous loyalty to a repertoire of brands (Ehrenberg, Uncles & Hammond 1995; Sharp 2010), and extends this theory to the art market, where agents take the place of brands. It also supports and extends to the art market the theory that consumers do not try hard to obtain all available information about a product or category before making a purchase choice (Sharp & Romaniuk 2004), and the well-documented gap between attitudes and behaviours (Ajzen & Fishbein 1977; Auger & Devinney 2007; Sharp 1997), especially in ethical consumption contexts (Auger & Devinney 2007; Carrington, Neville & Whitwell 2010; Devinney et al. 2010), finding that whilst some buyers value fair treatment of artists and uphold these values at the point of purchase, others may hold similar attitudes but do not purchase accordingly.

This thesis also contributes to the body of literature on buyer behaviour in luxury and hedonic product markets (Lagier & Godey 2007; Vigneron & Johnson 1999, 2004; Wiedmann, Hennigs & Siebels 2007, 2009), extending to art products existing theories on the pleasure (Lagier & Godey 2007) offered through the purchase of non-essential but satisfying (Dobrian 2006) luxury goods. Findings regarding the centrality of aesthetics to consumer choice can be generalised to hedonic and luxury goods markets. As this thesis is largely about the perceptions of supply chain actors regarding different distribution channels, it also contributes to literature on markets where supply chains are hidden or complex (Awaysheh & Klassen 2010; Tapscott & Ticoll 2003), such as in fashion and consumer goods industries where manufacturing often takes place in the developing world (Emmelhainz & Adams 1999; Mamic 2005; Roberts 2003).

Finally, the quantitative phase of this thesis contributes another example of the strength of establishing empirical generalisations using a Many Sets of Data (MSoD) approach, and the qualitative phase contributes an example of the use of thematic analysis as an over-arching method of analysing qualitative data.

Industry

As this thesis is part of a government-funded research program focused on building resilience in the Aboriginal and Torres Strait Islander art sector (Acker, Stefanoff & Woodhead 2012), implications for industry are important. Prior to this thesis consumer profiles, purchase characteristics and perceptions of the industry issues studied were undocumented and the sector’s understanding was ad-hoc, based on anecdotal evidence. This thesis contributes vital baseline data on an under-researched market and the buyers that sustain it, providing a strong grounding for further research in the area. Specifically, this thesis makes the following practical contributions:

- It analyses the profiles, purchase preferences and perspectives of buyers in the lower and middle price tiers of the primary market, creating new knowledge which will enable commercial agents, Art Centres and artists to identify high-priority areas within their existing marketing strategies, and focus investment of limited resources (Awaysheh & Klassen 2010);
- It provides the industry with detailed analysis of buyer behaviour at three annual art purchasing events (Darwin Aboriginal Art Fair, Cairns Indigenous Art Fair and Desert Mob), which are important consumption channels, especially in the lower and middle price tiers. This information may be used to tailor marketing strategies and channels for these events, or to refine the offerings of vendors;
- It contributes hitherto unavailable information on consumer and agent perceptions of the Indigenous Art Code, addressing the Code's efficacy in increasing consumer awareness and confidence around the ethical production and sale of artworks, which is currently under scrutiny within the industry (Raffan 2013). This is useful for policy development and adds evidence of the impact of regulation in markets such as this one.

This thesis also identifies a range of barriers to market resilience that have implications for the ongoing sustainability of the sector. For example:

- Consumer perceptions of agents

This thesis found that consumer perceptions of agents are often quite polarised, with commercial agents perceived as self-interested middlemen and Art Centres as beacons of ethical conduct. At times, these perceptions were at odds with purchase behaviour – many respondents purchased through commercial agents, despite being dubious about the ethics of such agents. These findings are significant when considered in relation to another finding from this thesis – that buyers often do not try hard to ascertain all relevant information about a product or the person selling it. This suggests the industry has work to do in order to challenge buyer assumptions, increase their knowledge levels in terms of the Aboriginal and Torres Strait Islander art supply chain, and hopefully increase their levels of agency in future purchase negotiations.

- Perceived oversupply

This thesis has found that (at least some) buyers in the lower and middle markets perceive that there is an oversupply of art products in the primary market, and that at times this affects consumer confidence.

- Lack of consumer knowledge

This thesis has found that many buyers lack the knowledge required to make informed purchase decisions, and often purchase based on superficial judgments about the seller. Drawing upon extant consumer behaviour research, it also posits that buyers do not seek out all product or market information available to them, meaning they often make poor purchase choices – either in terms of product quality or provenance. The Aboriginal and Torres Strait Islander art market has long attempted to better inform consumers about their purchase choices. The patterns of buyer behaviour identified pose challenges for the industry, but future information provision and educative campaigns must continue to emphasise empowering buyers to make better choices.

Limitations

There are some limitations that should be considered when drawing inferences from the findings in this thesis, which were outlined in Chapter One and are expanded upon below. Future research will enable these limitations, especially those methodological in nature, to be addressed, thereby strengthening a growing body of research in this area.

Social desirability bias and the attitude-behaviour gap

This thesis has already described the social desirability bias often present within respondent self-report data (Bruner & King 2000; Davies, Lee & Ahonkhai 2012; Ewert & Galloway 2009) and the fact that intentions do not correlate strongly with actual behaviours (Ajzen & Fishbein 1977; Auger & Devinney 2007; Carrigan & Attalla 2001; Carrigan, Szmigin & Wright 2004; Carrington, Neville & Whitwell 2010; De Pelsmacker, Janssens & Mielants 2005; Devinney et al. 2010; Sharp 1997, 2010; Vermeir & Verbeke 2006; Wright & Klÿn 1998). As noted throughout this thesis, social desirability bias may be prevalent in claimed purchase behaviour data, because buyers may understand that there is a 'social good' aspect to buying Aboriginal and Torres Strait Islander art – regardless of whether they actually hold this value themselves or enact it through their purchase choices. It is therefore reasonable to assume that self-report claimed behaviour data may emphasise altruistic elements of purchase choices. However, within the under-researched context of buyer behaviour in the Aboriginal and Torres Strait Islander art market it was perceived that self-report claimed behaviour data was a required first step in understanding consumer decision-making. Future research utilising observed behaviour data would be a valuable next step.

Sample bias

There are also some inherent biases within the samples used for this thesis. ‘One-off’ buyers are unavoidably absent from both the quantitative and qualitative samples, due to the difficulty in recruiting such buyers and because visitors to the three art fairs used for the quantitative samples were somewhat ‘involved’ with Aboriginal or Torres Strait Islander art, or else they would not have been in attendance. This is not a significant limitation, as those visitors are representative of a component of the wider buying population. A greater limitation, at least within the quantitative sample, is the fact that survey respondents may hold more prevalent ‘pro-Art Centre’ views, due to the geographic location of those events and the high local visitation at each fair. Had the survey been conducted in Sydney or Melbourne, a higher proportion of respondents may have chosen ‘commercial galleries’ as their most frequently used purchase method. This may have skewed the quantitative results somewhat towards Art Centre-purchasing, with potential implications for responses to provenance questions within the survey.

Survey design

The limitations of rank order data (discussed in Chapter Three) are relevant to the quantitative data on consumer purchase criteria. It is now understood that an alternative question format would have produced richer data and been easier for respondents to answer. However, as the results from that survey question correlated strongly with the ‘intention to purchase’ question, this limitation need not be overstated.

Implications for future research

This thesis presents a number of opportunities for future academic research, and for research and policy development in the Aboriginal and Torres Strait Islander art sector. Some recommendations for future research are proposed below.

Alternative methods

Observational data

As previously outlined, this thesis is limited by the nature of the data collected (attitudinal and claimed behaviour data), which was in turn dictated by the methodology. It would be highly relevant to build upon this study with one that measured actual purchase behaviour through observational data collection. This would allow future researchers to understand and document the purchase process with greater certainty.

Use of comparative studies to understand market data

As acknowledged elsewhere in this thesis, a number of findings relevant to this thesis' first research question are of limited use on their own. They require the contextualisation afforded by comparative studies, in order to establish whether or not various market conditions differ for Aboriginal and Torres Strait Islander art, compared to other art markets. For example, how does the analysis of preferred mediums and price ranges compare to that of other markets? Are paintings the most preferred sale item in non-Indigenous art markets? Future research that compared the market conditions for Aboriginal and Torres Strait Islander art with those found in other art markets would provide useful contextualisation for these findings.

Buyer behaviour

Impact of product supply upon consumer choice

Supply side issues affecting consumer choice were not covered in this thesis, and would be a natural and worthy complement to the findings presented, triangulating consumer purchase data with agent offerings and artistic production. This thesis has found that the overwhelming majority of buyers purchase acrylic paintings on canvas or linen. At the time of writing, the Art Economies Project is collating product supply and sales data from Art Centres and agents across Australia, which will detail production and sales according to a range of variables, including by artwork medium. However, this data was not available in time for submission of this thesis, and so it remains unclear whether supply of acrylic paintings is fuelling the strong preference identified. When it becomes available, cross-referencing this data with consumption patterns outlined in this thesis will enable pertinent analysis of supply and demand in this market. The author intends on incorporating this data into future writing on the subject.

One-off and low end buyers

This thesis has documented the profiles, purchase characteristics and criteria of lower and middle market buyers. It does not document the profiles and behaviours of ‘one-off’ buyers; those purchasing very infrequently at the lowest end of the market (souvenirs, merchandise, etc.), and this would be a worthwhile extension of this research.

Online purchasing

Whilst this thesis was being written, another member of the Art Economies Project team was completing research on the benefits of e-commerce to remote Aboriginal and Torres Strait Islander Art Centres. Whilst the findings of that thesis were not known at the time of writing, further research on consumer perceptions and uptake of online purchasing in the art market would be valuable given the global trend towards e-commerce, and would extend existing research on the application of e-commerce in art markets (Cardamone 2007; Clarke III & Flaherty 2002; Quesenberry & Sykes 2008; Smith, Discenza & Baker 2006).

International buyers

Brief mention of international buyer behaviour is made in this thesis, but could not be studied in detail. Greater understanding of whether culturally distinct purchase preferences exist would be worthy of future research, in order to better understand the potential for international markets for Aboriginal and Torres Strait Islander art.

Provenance

Measure perceptions using other methods

Consumer perceptions of provenance are worthy of further exploration given its obvious importance to the sector. It is recommended that future research employ different methods, where the research aims are not so overtly evident to respondents. For example, in situ observational methods which enable the researcher to observe actual behaviours. This will alleviate potential social desirability bias and strengthen the reliability of results. A more diverse qualitative sample would also allow a greater range of perspectives to be captured. This could be achieved by targeting buyers at more general art buying events, such as the Melbourne Art Fair, which exhibits both Aboriginal and Torres Strait Islander art and non-Indigenous art, and would therefore attract a more diverse audience.

Explore other dimensions of provenance

This thesis has focused on the ethical dimensions of provenance, as they are of great significance to the livelihoods of Aboriginal and Torres Strait Islander artists. Buyers who purchase works of sound provenance, from agents or Art Centres who work ethically with artists, reinforce the value of maintaining ethical conditions and remuneration for those artists. However, provenance is multidimensional, as discussed at the beginning of this thesis. Future research may consider other dimensions of provenance in more detail. For example, as has been noted by Smith Maguire (2013), provenance is inextricably linked to notions of authenticity and quality in many markets, and this is certainly true of the Aboriginal and Torres Strait Islander art market. Further study of the pleasure and satisfaction felt by buyers as a result of 'authentic' purchasing experiences (such as visiting a remote Art Centre), or stories told to them by agents of an artist's cultural or geographic heritage, would be very interesting. As noted briefly in this thesis, there are many similarities with the wine market in terms of the use of provenance as a marketing tool, and further use of existing research in that area would provide fruitful correlations.

Provenance documentation

Whilst not a key finding, this thesis did reveal some perceptual issues in relation to the provenance documentation provided by sellers of Aboriginal and Torres Strait Islander art. It was noted by one respondent that Certificates of Authenticity can be ‘dodgy’, highlighting the lack of trust in this industry mechanism (felt by at least some buyers). Further, sellers too felt some buyers felt sound provenance was assured through the provision of such a certificate, and lamented this fact given certificates can be lacking in detail required to establish provenance (at best) or entirely fabricated (at worst). It would be of great practical benefit to the industry to study more closely consumer perceptions of provenance documentation.

Art Centre / non-Art Centre provenance

There is great scope for researchers to more closely study consumer perceptions of Art Centre and non-Art Centre provenance, and implications for industry. This thesis proposed that there is a bias amongst some consumers towards purchasing through Art Centres as opposed to commercial agents. This may reflect a changing industry landscape, or it may reflect the tendency for consumers to view commercial agents as unnecessary ‘middle men’. More targeted research would benefit the industry as it refines strategies to educate consumers about the Aboriginal and Torres Strait Islander art supply chain.

Trade offs affecting consumer choice

It would also be pertinent to consider more closely the relationship between artwork provenance and aesthetic appeal for consumers when making purchase choices. As demonstrated in Chapter Five, many consumers expressed their interest in provenance issues, whilst simultaneously finding aesthetics to be the most important factor in their choices. A study that required consumers to trade off various product attributes with the use of a ‘best-worst’ choice scale method may provide insight into the relative influence of provenance and aesthetics in consumer choice, and would extend existing research in this area (Johnson 1974).

Consumer education and industry regulation

Impact of knowledge upon provenance perceptions

A relationship exists between perceptions of provenance and knowledge of broader Aboriginal and Torres Strait Islander art market issues, with increased knowledge coinciding with less anxiety or overt concern about provenance. A study that investigated in more detail the relationship between these two factors would be of great benefit to the sector as it navigates the efficacy of consumer education and information provision initiatives. This thesis suggests that increased, and unbiased, information and consumer education may assist consumers to make informed purchase choices. Further research on the impact of information provision upon consumer choice would strengthen that claim and build upon extant literature (Jacoby, Chestnut & Silberman 1977; Johnson & Levin 1985; Shapiro 1982).

Effectiveness of regulation

This thesis has found that buyers are either unaware of the Indigenous Art Code, or if they are, do not utilise it when making purchase choices. However, it has not established whether greater promotion of the Code would impact consumer perceptions and / or purchase behaviour. Future research that did so would not only provide a direct benefit to the industry, but would also extend existing academic research on the effectiveness of codes of conduct more broadly (Awaysheh & Klassen 2010; Emmelhainz & Adams 1999).

Products and services

Product diversification

Research that considered methods for product diversification in the primary market for Aboriginal and Torres Strait Islander art would also be of great benefit. The predominance of acrylic paintings, mentioned above, has implications for artists working in other artistic mediums. It would be useful to understand in more detail any interests buyers have in terms of product diversification, as this would enable artists to understand where opportunities exist to diversity their practice. Similarly, agents would have an evidence base to guide future consignment and exhibiting decisions.

Art / tourism linkages

Whilst purchasing art as a 'souvenir' was not important to the majority of the survey sample, an association between tourism activities and art purchasing was revealed during a small number of qualitative buyer interviews. Qualitative data seemed to suggest that some buyers are interested in genuine engagement with Aboriginal and Torres Strait Islander people and communities, rather than a superficial engagement through the purchase of a 'souvenir'. Tours to remote communities and Art Centres already exist, run through both tourism operators and art professionals, and consumer interest in these kinds of 'experiential' purchasing environment would be worthy of a more sustained investigation.

Conclusion

Despite the importance of buyers to any functioning market, until now little research existed on the buyers of Aboriginal and Torres Strait Islander art and knowledge of their purchase preferences, behaviours and views on a range of industry issues was ad hoc and anecdotal. This thesis contributes new knowledge of these issues, thereby establishing a baseline of data from which further studies can be developed in this emerging field of inquiry.

It should be clear from this research that the Aboriginal and Torres Strait Islander art industry faces significant challenges. This research demonstrates that whilst some buyers are interested in the ethical dimensions of provenance, other criteria – such as aesthetic appeal or price – often win out at the point of purchase, and that misperceptions abound among inexperienced buyers. Despite the efforts of industry, improved and consistent messaging regarding provenance and ethical dealing is required. Because consumers generally don't seek out extensive information about potential purchases, ongoing education – as well as information provision – is necessary, especially in the lower price tiers.

Firstly, this thesis reviewed a range of literature relevant to its aims. Because of the cross-disciplinary nature of the thesis and the under-researched nature of the topic, literature from multiple disciplines was reviewed in order to develop a framework for the understanding of buyer behaviour in this market. Marketing literature on consumer choice in various product markets was applied to the topic in order to see whether known patterns of behaviour could be extended to this market. The synthesis of literature in Chapter Two provides future researchers with a framework through which further understanding of buyer behaviour in this market can be developed. The literature review informed the formulation of three key research questions, which were addressed using a two-tiered mixed methods research design enabling triangulation of quantitative and qualitative data.

This thesis found that buyers of Aboriginal and Torres Strait Islander art can be broadly segmented according to their knowledge and involvement levels (Ismail & Barber 2008), with ‘decorators’ and ‘collectors’ offering two broad segmentation profiles to which various findings can be pinned. Higher involvement levels increase a buyer’s ability to perceive quality in art products (Zeithaml 1988), something that can be quite intangible to the uninformed buyer of Aboriginal and Torres Strait Islander art, which often depicts complex iconography inscrutable to the viewer. Extending the established theory of consumer repertoires, this thesis found that Aboriginal and Torres Strait Islander art buyers are polygamous in their loyalty to agents, as they are for brands (Sharp 2010).

Aesthetics are central to the purchase choices of most buyers, extending the work of Coleman (2004) and Belk and Groves (1999) and reinforcing extant literature from the fields of luxury and hedonic consumption. Buyers variously cited emotional responses or feelings of altruism as other important evaluative criteria, often in relation to provenance, which was seen by some as an assurance of the fair remuneration of artists and by others as an indicator of value. As attitudes are often poor indicators of future behaviour, the extent to which provenance and aesthetics are ‘traded off’ when making purchase choices is not yet clear. Agent perspectives on consumer interest in provenance support the notion that some buyers over-claim their interest in provenance in terms of their actual purchase behaviour, perhaps reflecting the influence of social desirability bias.

Across both samples, buyers expressed uncertainty about agent claims of ethical dealing. Pricing disparities and variations in product quality compound this issue, with buyers often assuming the worst in the absence of detailed product information. Despite this, buyers often do not work hard to uncover all available information, and often make purchase choices based on a range of superficial judgments. The majority of buyers were either unaware of the Indigenous Art Code's existence or, if they were aware, did not utilise it when making purchase choices, suggesting that this industry attempt has so far been ineffective in its aim of assisting buyers to make informed purchase choices.

This thesis contributes to academic literature in the fields of marketing and arts management. It has tested and extended existing consumer choice theories and contributed hitherto unavailable baseline data that will allow the industry to understand how existing policies and industry norms are being understood and utilised in the marketplace. It should be clear from the findings in this thesis that the industry faces significant challenges in increasing consumer awareness, knowledge and confidence in a range of existing market mechanisms. It is hoped that these findings will contribute to a more resilient Aboriginal and Torres Strait Islander art sector.

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Appendices

Appendix 1: Examples of remote area art

Appendix 2: Example of a certificate of authenticity

Appendix 3: Consumer survey

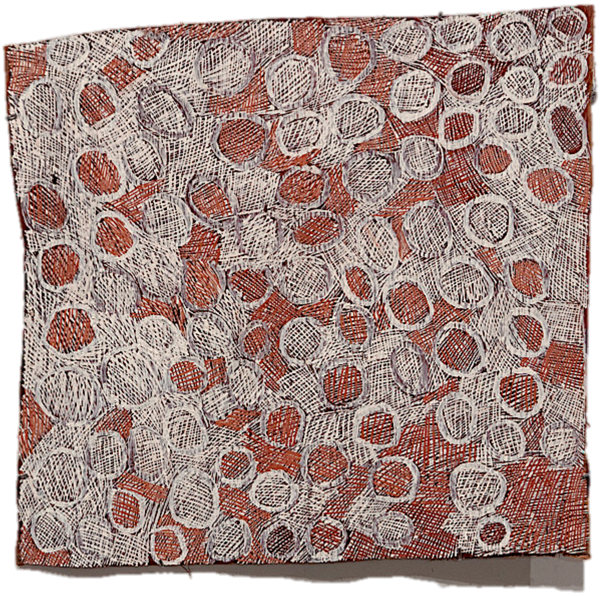
Appendix 4: Participant Information Sheet (survey)

Appendix 5: Participant Consent Form

Appendix 6: Art Economies Project Postcard

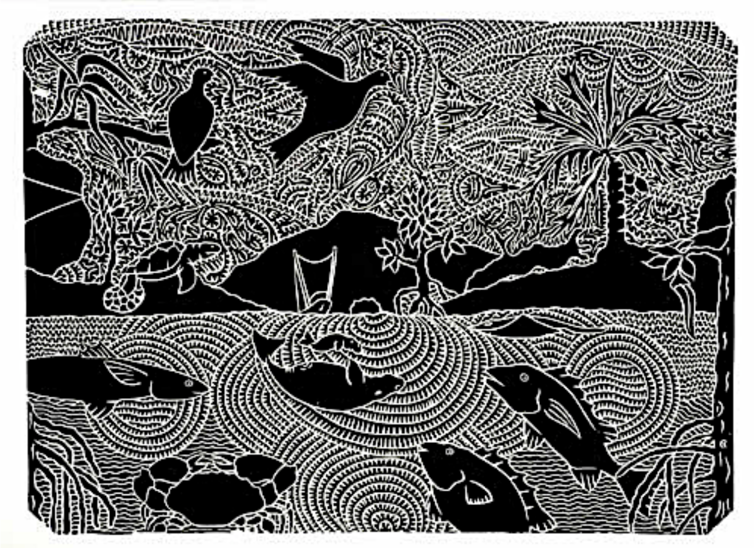
Appendix 7: Participant Information Sheet (interview sample)

Examples of remote area Aboriginal and Torres Strait Islander art



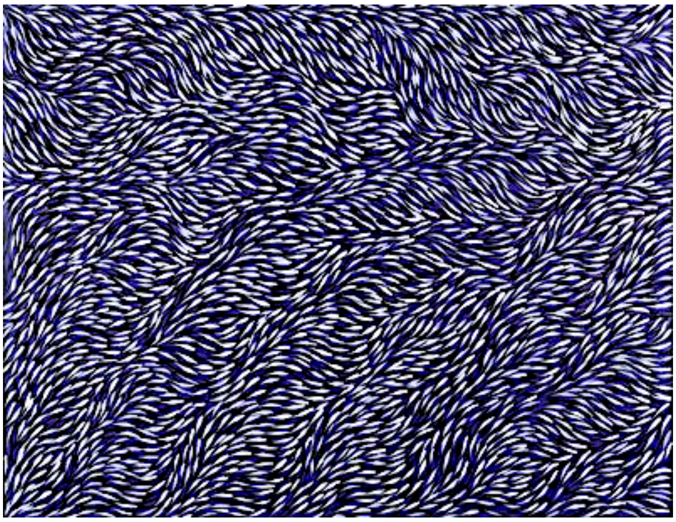
Nyapanyapa Yunupingu (NE Arnhem Land)
Mangutji #8 2010
Natural earth pigments on bark, 77 × 83 cm
Image courtesy Roslyn Oxley9 Gallery

Gordon Barney (Kimberley region)
My Country 2013
Natural ochre and pigments on canvas, 120 x 90 cm
Image courtesy Warmun Art



David Bosun (Torres Strait Islands)
Kek - Monsoon Season 2007
Linoprint, 44 x 60 cm
Image courtesy the Australian Print Network

Sally Gabori (Mornington Island, Queensland)
Dibirdibi Country 2011
Acrylic on linen, 121 x 121 cm
Image courtesy Raft Artspace



Janet Golder Kngwarreye (Central Australia)
Bush Leaves
Acrylic on linen, 90 x 120cm
Image courtesy Muk Muk Fine Art Gallery

Patrick Freddy Puruntatameri (Tiwi Islands)
Owl 2006
Natural ochres on ironwood
55cm (height)
Image courtesy Jilamara Arts and Crafts

Phyllis Napurrurla Williams (Central Australia)
Karnta Jukurrpa (Women's Dreaming)
Acrylic on canvas, 107 x 30 cm
Image courtesy Warlukurlangu Artists

Rona Panangka Rubuntja (Herrmansburg)
Cockatoo
Acrylic paint and glaze on ceramic
26 x 24 x 35 cm
Image courtesy Coo-ee Art Gallery

Judith Inyika Chambers (Central Australia)
Basket
25 x 11 cm
Image courtesy Tjanpi Desert Weavers

Ikuntji

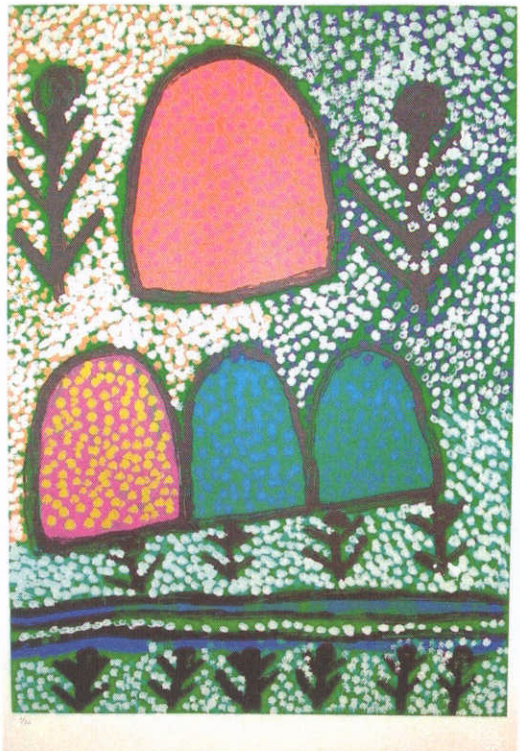
FINE ART FROM DESERT AUSTRALIA

Iku-7- **Appendix 2**

Certificate of Authenticity

Linda Napurulla
Ngitjanka

CAT NO: IKP06LN10-30



DOB:	1/01/1935
SKIN NAME:	Napurrula
LANGUAGE:	Pintupi
REGION:	North West of Papunya
SIZE/MEDIUM:	56cm x 76cm
TITLE:	Alkipi Country

DESCRIPTION:

Linda describes her birth country of Alikpi. There are rockholes and rockhills filled with bush tucker ready to be found, after the desert rains.The honey grevillia depicted is significant to Linda, and a good source of bush lolly.

Authorised by Manager

Ikuntji Art Centre Haasts Bluff via Alice Springs 0872 NT
Ph/Fax 08 8956 8783 email: fineart@ikuntji.com.au www.ikuntji.com.au

Aboriginal & Torres Strait Islander Art Economies Project: Survey

Marketing & Consumer Dynamics in the Indigenous Art Industry

This survey is part of a research project that aims to understand the motivations that underpin demand for Aboriginal and Torres Strait Islander art and the way it is presented to consumers. This analysis will provide invaluable information to the Aboriginal and Torres Strait Islander sector, including remote area artists.

Indigenous artists need to be well equipped to adapt to changing markets. To do so they require meaningful data on the markets in which their work is sold, and the motivations of those who buy it.

This research will form one part of a wider analysis being conducted through the Cooperative Research Centre for Remote Economic Participation, called the Aboriginal and Torres Strait Islander Art Economies Project. The project aims to be a comprehensive, industry-wide analysis of the Aboriginal and Torres Strait Islander visual art sector, contributing to the advancement of remote area artists.

Please note that 'Aboriginal and Torres Strait Islander' has been replaced by 'Indigenous' throughout this survey, in order to make questions as simple as possible.

If you have any queries please contact the Principal Researcher, Jess Booth.

Before you begin...

Please ensure you have read the PARTICIPANT INFORMATION SHEET and signed the PARTICIPANT CONSENT FORM before completing this survey.

Thank you.

About You

Please provide a few details about yourself.

1. Are you male or female?

◯ Male

◯ Female

2. What is your age?

◯ 18 – 35

◯ 36 – 50

◯ 51 – 65

◯ 66 or over

3. If you live in Australia, what is your home postcode?

4. If you live outside of Australia, in which country do you live?

5. Which of the following best describes your reason for attending this event (please select all that apply):

- [ ] I'm here to have a look - I don't intend to buy anything
- [ ] I'm here to have a look and may purchase something
- [ ] I buy small pieces of Indigenous art or craft occasionally
- [ ] I buy art, both Indigenous and non-Indigenous
- [ ] I buy mostly Indigenous art, but don't see myself as a collector
- [ ] I collect Indigenous art and have good knowledge of the market

Other (please specify)

About You & Indigenous Art and Craft

Questions 6 to 20 ask about your preferences in relation to viewing and purchasing Indigenous art or craft.

6. Are you satisfied with the quality of works available at this event?

Not satisfied at all	Somewhat satisfied	Quite satisfied	Very satisfied
○	○	○	○

7. Do you think the prices of works for sale at this event are good value?

The prices seemed too low	Some items seemed well-priced	Not sure	Some items seemed too expensive	Most items seemed too expensive
○	○	○	○	○

8. If you were thinking about buying a piece of Indigenous art or craft, how important would each of these be in making your choice?

	Not important	Not very important	Somewhat important	Quite important	Very important
A good price	○	○	○	○	○
Quality craftsmanship & materials - that is it well made	○	○	○	○	○
An artist with a good reputation; I would hope the work would appreciate in value	○	○	○	○	○
A piece that came from an ethical source (i.e. the reputation of the seller)	○	○	○	○	○
Something that looks good; is aesthetically pleasing	○	○	○	○	○
A piece with an interesting story attached to it	○	○	○	○	○
A connection (personal/professional) to the community the piece is from	○	○	○	○	○

Other (please specify)

9. Please rate on the scale below, how true this statement is for you:

'If I was considering purchasing a piece of Indigenous art or craft, the fact that it came from an Indigenous Art Centre would be important to me.'

Not true at all	Somewhat true	Not sure	Quite true	Very true
○	○	○	○	○

10. Have you ever purchased a piece of Indigenous art or craft? If you answer NO to this question, you will automatically skip to Question 20. If you are filling out this survey manually, and you answer NO to this question, please skip to Question 20 yourself.

○ Yes

○ No

About You & Indigenous Art and Craft

11. Where have you purchased Indigenous art or craft from? (Please tick all that apply)

- [ ] From a commercial gallery (in person)
- [ ] From a commercial gallery (through their website)
- [ ] From an Indigenous Art Centre (in person)
- [ ] From an Indigenous Art Centre (through their website)
- [ ] From an art fair
- [ ] Privately (through a friend / colleague / acquaintance)
- [ ] Through an auction house
- [ ] On the internet (eBay, online auction, etc. rather than a gallery's or art centre's website)

If you selected 'On the internet', please specify (eBay, online art gallery, online auction, other)

12. If you have purchased multiple items of Indigenous art or craft, which of the purchasing methods below would you say you use the most? (Please tick only one)

- ○ Commercial galleries
- ○ Indigenous Art Centres
- ○ Privately (through friends / colleagues / acquaintances)
- ○ Art fairs
- ○ Auction houses
- ○ On the Internet
- ○ Not applicable - I have not purchased multiple pieces of Indigenous art or craft

If you selected 'On the internet', please specify (eBay, online art gallery, online auction, other)

13. Now please think about the MOST RECENT piece of Indigenous art or craft you have purchased (if you have purchased multiple items recently, just think about one of them).

What was the year of purchase (if you can't remember exactly, please estimate)?

14. Thinking about the same item, what kind of item did you purchase?

- ◯ A painting (on canvas)
- ◯ A painting (on bark)
- ◯ A work on paper (print, painting, drawing, etc.)
- ◯ A wooden sculpture or carving
- ◯ A piece of pottery / ceramic
- ◯ A glass piece
- ◯ Fabric or clothing
- ◯ Jewellery
- ◯ Merchandise (designed product – notebook, pencil case, etc.)
- ◯ A weaving (basket, floor mat, woven sculpture, etc.)

Other (please specify)

[ ]

15. What helped you decide to purchase the item?

Please rank from 1 – 10, with 1 being most important, and 10 least important. Please note that if you are completing this survey online, as you select an option, it will move to the top of the list. Therefore, please work from 1 - 10, thinking about the most important option first, followed by the next most important, etc.

[ ]	It was a good price
[ ]	I liked the colours / design / pattern, etc. and it will look good in my home
[ ]	It demonstrates quality craftsmanship and uses quality materials
[ ]	It's a demonstration of Indigenous culture
[ ]	I was interested in the subject matter or story it depicts
[ ]	It is a distinctly 'Australian' souvenir
[ ]	I have a particular interest in the artist
[ ]	I see it as a financial investment
[ ]	I care about Indigenous issues and think it is important to support Indigenous artists
[ ]	I have a professional / personal connection to the artist and/or the community the item is from

16. How much did you spend on that item?

- $1 - $200
- $201 - $500
- $501 - $2000
- $2001 - $10,000
- $10,000 or over

17. Please estimate how much you have spent on Indigenous art or craft, in total?

- $1 - $200
- $201 - $500
- $501 - $2000
- $2001 - $10,000
- $10,001 - $50,000
- $50,001 - $500,000
- $500,000 or over

18. Do you know where the seller sourced the piece of Indigenous art or craft you purchased?

- Yes
- No
- Not sure

19. Was the source of the piece of art or craft important in your decision to purchase it?

- Yes
- No
- Somewhat

Please feel free to provide further comment below:

Commercial Agent Marketing Practices

Questions 20 to 27 seek to understand your views on Commercial Agent Marketing Practices. For the purposes of this research, a ‘commercial agent’ is anyone who sells Indigenous art or craft.

20. Have you heard of the Indigenous Art Commercial Code of Conduct?

- Yes
- No
- Not sure

21. Have you ever enquired about the Indigenous Art Commercial Code of Conduct when visiting a commercial gallery that sells Indigenous art or craft?

- Yes
- No
- Not applicable - I haven't heard of the Indigenous Art Commercial Code of Conduct

22. What percentage of the retail sale price do you think an Indigenous artist gets when he/she sells an artwork through a commercial agent (a commercial gallery, private dealer, etc.)?

- I don't know
- 0% - 20%
- 21% - 40%
- 41% - 60%
- 61% - 80%
- 81% - 100%

23. What percentage of the retail sale price do you think an Indigenous artist gets when he/she sells an artwork through an Indigenous Art Centre?

- I don't know
- 0% - 20%
- 21% - 40%
- 41% - 60%
- 61% - 80%
- 81% - 100%

24. Do you think there is enough reliable information available to buyers about the way different commercial agents source their work?

- Yes
- Somewhat
- This is not important to me
- Not sure
- No

If there is particular information you would like to access, please specify

25. Do you think there is enough reliable information available to buyers about the way Indigenous Art Centres source their work?

- Yes
- Somewhat
- This is not important to me
- Not sure
- No

Please feel free to provide further comment:

26. Where do you get information about buying Indigenous art and craft? (Please tick all that apply)

- ☐ From commercial galleries
- ☐ From friends who know about Indigenous art and craft
- ☐ From the media – newspapers, the internet
- ☐ From peak bodies like Desart, ANKAAA or IACA
- ☐ Through the Indigenous Art Commercial Code of conduct
- ☐ From Indigenous Art Centres
- ☐ Other – please specify:

Other (please specify)

27. Are there types of Indigenous art or craft that you would like to purchase, but can't find? (Please specify)

Would you be available to talk a little more about your views on this topic...

In order to collect the richest and most meaningful data to assist Indigenous artists to understand the motivations of those who buy their art, this research project will also be conducting short (10 - 20 minute) interviews with a range of buyers of Indigenous art. The Principal Researcher, Jess Booth, would make contact by email (or phone if preferred), and then arrange a time for a short conversation by phone, email, Skype or in person.

If you would be happy to be contacted by the Principal Researcher, Jess Booth, to ask you a few more questions about you and Indigenous art, please write your contact details on the sheet available. Please speak with Jess or one of the research assistants if you'd like more information before agreeing to be contacted. Thank you for taking the time to assist with this research.

Research and Innovation Services

UniSA

Human Research Ethics Committee
PARTICIPANT INFORMATION FORM

PARTICIPANT INFORMATION SHEET

Research project title: *Marketing & Consumer Dynamics in the Indigenous Art Industry*

University of South Australia, Division of Education, Arts and Social Sciences Cooperative Research Centre for Remote Economic Participation

Researcher details:

Jessica Booth, Masters by Research, David Unaipon College of Indigenous Education & Research, University of South Australia

Mobile: +61 402 307 212

Email: jessica.booth@mymail.unisa.edu.au

What am I being asked to do?

You are being invited to voluntarily participate in a research project that explores the purchasing habits and interests of consumers of Aboriginal and Torres Strait Islander art, and the marketing practices of galleries, in order better understand what drives demand in the Aboriginal and Torres Strait Islander art market. This research is being carried out by Jessica Booth, who is undertaking a Masters by Research through the University of South Australia, in partnership with the Cooperative Research Centre for Remote Economic Participation.

Before making a decision about whether to participate, it is important to understand why the research is being done and what it will involve. Please take time to read the following carefully and please ask if you have any additional questions. Thank you.

What is the purpose of the project?

This research will form one part of a wider analysis being conducted through the Cooperative Research Centre for Remote Economic Participation, called the *Aboriginal and Torres Strait Islander Art Economies Project*. The project aims to be a comprehensive, industry-wide analysis of the Aboriginal and Torres Strait Islander visual art sector, contributing to the advancement of remote area artists.

By identifying the motivations that underpin demand for Aboriginal and Torres Strait Islander art, and the way it is marketed, this analysis will provide invaluable data to all levels of industry, including remote area artists. Indigenous artists need to be well equipped to adapt to changing markets. To do so they require meaningful data on the markets in which their work is sold, and the characteristics and motivations of those who consume it.

Who will be participating?

A range of 'key informants' in the Aboriginal and Torres Strait Islander art sector, including buyers, gallery owners and curators, are involved in the project.

Why have I being asked to participate?

You are being asked to participate because you are a visitor to this Aboriginal and Torres Strait Islander art event.

Do I have to take part?

Your participation in this study is entirely voluntary and you are of course free to accept or refuse to participate. If you do decide to take part you will be asked to sign two copies of the consent form, one of which the researcher will keep. There will be no penalty if you refuse to participate. You can withdraw at any time and there will be no penalty imposed.

What will be involved if I decide to participate?

You will participate in this survey. This survey will collect information regarding your preferences in terms of buying Aboriginal and Torres Strait Islander art or, if you do not buy Aboriginal and Torres Strait Islander art, your views on the industry more broadly.

Will my details remain confidential?

Your will respond anonymously, unless you would like to participate in a later follow up interview, in which case you are invited to provide the researcher with your name and contact details. If you do so you can be assured your details will remain confidential.

Your responses will be stored anonymously and kept confidential by the researcher. They will not be identified in the reporting of the research.

While findings gained from this research project may be published, no individuals will be identified. All original data will be stored securely following the Australian Code for the Responsible Conduct of Research. They will be kept confidential for a period of five years, after which they will be destroyed.

What will happen to the findings of the research project?

The findings will be used in the researcher's Masters by Research thesis, and parts of the research may be submitted for publication in academic publications such as conference papers and journals. You are very welcome to obtain a summary of the research findings from the researcher in 2014, by emailing the researcher. Summative findings from these surveys will also be available in late 2013.

Who do I contact if I want to discuss any aspects of the study?

Please contact Jessica Booth via email: jessica.booth@mymail.unisa.edu.au

What if I have any concerns?

If you have any concerns about this research, you should contact the researcher's supervisors. Their contact details are as follows:

Dr. Mary Knights: Division of Education, Arts and Social Sciences, School of Art, Architecture & Design, University of South Australia

Tel: +61 8 8302 4543 / Email: Mary.Knights@unisa.edu.au

Tim Acker, Principal Research Leader, Cooperative Research Centre for Remote Economic Participation, Aboriginal and Torres Strait Islander Art Economies Project (Curtin University)

TelL +61 8 9266 9163 / Mobile: 0410 038 226 / Email: Tim.Acker@curtin.edu.au

If you have any ethical concerns about the project or questions about your rights as a participant please contact the Executive Officer of the University of South Australia's Human Research Ethics Committee, Ms. Vicki Allen at Vicki.Allen@unisa.edu.au or telephone +61 8 8302 3118.

Research and Innovation Services

Human Research Ethics Committee
CONSENT FORM

Use this consent form when taped materials, photographs or written material are to be retained

This project has been approved by the University of South Australia's Human Research Ethics Committee. If you have any ethical concerns about the project or questions about your rights as a participant please contact the Executive Officer of this Committee, Tel: +61 8 8302 3118; Email: Vicki.Allen@unisa.edu.au

SECTION 1: CONTACT AND PROJECT DETAILS

Researcher's Full Name:	Jessica Adelaide Booth
Contact Details:	jessica.booth@mymail.unisa.edu.au / m: +61 402 307 212
Supervisor's Full Name:	Dr. Anne Sharp
Contact Details:	Rosemary.Sharp@unisa.edu.au / ph: +61 8 8302 0637
Protocol Number:	0000028480
Project Title:	*Understanding buyer behaviour in the primary market for Aboriginal & Torres Strait Islander art*

SECTION 2: CERTIFICATION

Participant Certification

In signing this form, I confirm that:

- I have read the Participant Information Sheet and the nature of the research project has been explained to me. I understand and agree to take part.
- I understand the purpose of the research project and my involvement in it.
- I understand that I may withdraw from the research project at any stage and that this will not affect my status now or in the future.
- I understand that while information gained during the study may be published, I will not be identified and my personal results will remain confidential.

Participants under the age of 18 normally require parental consent to be involved in research. If you are under 18 please ask a parent to give consent on your behalf.

Participant Signature	*Printed Name*	*Date*

Researcher Certification

I have explained the study to subject and consider that he/she understands what is involved.

Researcher Signature	*Printed Name*	*Date*

Appendix 6

ABORIGINAL AND TORRES STRAIT ISLANDER ART ECONOMIES

This project will investigate the economic, social, cultural and artistic factors that define Australia's remote Aboriginal and Torres Strait Islander arts and crafts sector. A multidisciplinary research program will analyse the sector's value chains, and through collaboration with participants will identify strategies to improve livelihoods for artists and communities and contribute to the development of vibrant and sustainable Aboriginal and Torres Strait Islander arts and crafts practice.

NINTI ONE CRC REMOTE ECONOMIC PARTICIPATION

CRC AUSTRALIA

THE COOPERATIVE RESEARCH CENTRE FOR REMOTE ECONOMIC PARTICIPATION IS A RESEARCH CENTRE DELIVERING SOLUTIONS TO ECONOMIC DISADVANTAGE IN REMOTE AUSTRALIA.

ABORIGINAL AND TORRES STRAIT ISLANDER ART ECONOMIES IS PART OF THE CRC-REP'S ENTERPRISE DEVELOPMENT RESEARCH PROGRAM.

PROJECT IMPACTS

Combining a range of research disciplines, this project will support the development of the Aboriginal and Torres Strait Islander arts and craft industry in remote Australia. Major anticipated impacts of the research are:

- Increased sustainability of community art centres
- Improved livelihoods for artists and their communities
- Better information for enhanced planning and policy
- New market opportunities
- Greater knowledge for, and better relationships between artists, agents and audiences/consumers

(Cover image) Nancy Nyanyarna Jackson working on her painting in the Warakurna Artists studio, photo by Rhett Hammerton

CONTACT DETAILS:

Tim Acker

Mobile: +61 410 038 226

Email: tim.acker@nintione.com.au

Curtin University

www.crc-rep.com.au

PARTICIPANT INFORMATION SHEET

Research project title:

Understanding buyer behaviour in the primary market for Aboriginal and Torres Strait Islander art

University of South Australia / Cooperative Research Centre for Remote Economic Participation

Researcher details:

Jessica Booth, Masters by Research, Ehrenberg-Bass Institute for Marketing Science, University of South Australia

Mobile: +61 402 307 212

Email: jessica.booth@mymail.unisa.edu.au

What am I being asked to do?

You are being invited to voluntarily participate in a research project that aims to better understand the profiles and purchase choices of consumers of Aboriginal and Torres Strait Islander art. This research is being carried out by Jessica Booth, who is undertaking a Masters by Research through the University of South Australia, in partnership with the Cooperative Research Centre for Remote Economic Participation.

Before making a decision about whether to participate, it is important to understand why the research is being done and what it will involve. Please take time to read the following carefully and please ask if you have any additional questions. Thank you.

What is the purpose of the project?

The Aboriginal and Torres Strait Islander Art Economies Project, of which this research is part, aims to understand the networks of relationships that make up the Indigenous art sector, with the aim of contributing to a more resilient sector. The Project is being conducted by the Cooperative Research Centre for Remote Economic Participation in Alice Springs (http://crc-rep.com/research/enterprise-development/aboriginal-and-torres-strait-islander-art-economies).

My research focus is the buyers of Aboriginal and Torres Strait Islander art. By identifying the purchase choices of buyers, this research will provide invaluable data to all levels of industry, including remote area artists. Artists need to be well equipped to adapt to changing markets. To do so they require meaningful data on the markets in which their work is sold, and the characteristics and motivations of those who consume it.

Who will be participating?

A range of stakeholders in the Aboriginal and Torres Strait Islander art sector, including buyers, gallery owners, private dealers and curators, are involved in the project.

Why have I been asked to participate?

You are being asked to participate because you are a buyer or seller of Aboriginal and Torres Strait Islander art.

Do I have to take part?

Your participation in this study is entirely voluntary and you are of course free to accept or refuse to participate. If you do decide to take part you will be asked to sign two copies of the consent form, one of which the researcher will keep. There will be no penalty if you refuse to participate. You can withdraw at any time and there will be no penalty imposed.

What will be involved if I decide to participate?

You will participate in an interview with the principal researcher, Jessica Booth. Jessica will ask your views on the preferences and motivations of buyers when purchasing Aboriginal and Torres Strait Islander art, and your views on the industry more broadly.

Will my details remain confidential?

Your identity will remain anonymous. The interview will be recorded, but all contact details and interview transcripts will remain confidential and will be stored separately. They will not be identified in the reporting or publication of the research.

All original data will be stored securely following the Australian Code for the Responsible Conduct of Research. They will be kept confidential for a period of five years, after which they will be destroyed.

What will happen to the findings of the research project?

The findings will be used in the researcher's Masters by Research thesis, and parts of the research may be submitted for publication in academic publications such as conference papers and journals. You are very welcome to obtain a summary of the research findings from the researcher. Once the Aboriginal and Torres Strait Islander Art Economies project has been completed, the resulting research will be publicly available and disseminated more widely to industry stakeholders.

Who do I contact if I want to discuss any aspects of the study?

Please contact Jessica Booth via email: jessica.booth@mymail.unisa.edu.au

What if I have any concerns?

If you have any concerns about this research, you should contact the researcher's supervisors. Their contact details are as follows:

Dr. Anne Sharp: Ehrenberg-Bass Institute for Marketing Science, Division of Business, University of South Australia

Tel: +61 8 8302 0637 / Email: Rosemary.Sharp@unisa.edu.au

Tim Acker, Principal Research Leader, Cooperative Research Centre for Remote Economic Participation, Aboriginal and Torres Strait Islander Art Economies Project (Curtin University)

Tel: +61 8 9266 9163 / Mobile: 0410 038 226 / Email: Tim.Acker@curtin.edu.au

If you have any ethical concerns about the project or questions about your rights as a participant please contact the Executive Officer of the University of South Australia's Human Research Ethics Committee, Ms. Vicki Allen at Vicki.Allen@unisa.edu.au or telephone +61 8 8302 3118.