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The Art Economies Value Chain reports: Methodology and Art regions

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An Australian Government Initiative

CRC AUSTRALIA

NINTI ONE : CRC REMOTE ECONOMIC PARTICIPATION

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Shortened forms

IN THIS METHODOLOGY AND ART REGIONS REPORT

AACHWA	Aboriginal Art Centre Hub of WA (Perth)
ABS	Australian Bureau of Statistics
AEVC	Art Economies Value Chain
ANKAAA	Association of Northern, Kimberley and Arnhem Aboriginal Artists (Darwin)
CRC-REP	Cooperative Research Centre – Remote Economic Participation
DAA	Department of Aboriginal Affairs (Western Australia)
DCA	Department of Culture and Arts (Western Australia)
IACA	Indigenous Art Centre Alliance (Cairns)
ICS	Indigenous Cultural Support
IVAIS	Indigenous Visual Arts Industry Support
IEI	Indigenous Employment Initiative
Ozco	Australia Council for the Arts
RAF	Regional Arts Fund
TAN	Tiwi Art Network
TSRA	Torres Strait Regional Authority
WDM	Western Desert Mob

IN OTHER AEVC REPORTS

ABA	Aboriginal Benefits Account
AEP	(Aboriginal and Torres Strait Islander) Art Economies Project
ATSIAB	Aboriginal and Torres Strait Islander Arts Board: part of the Australia Council
BIA	Backing Indigenous Arts
GFC	Global Financial Crisis
PMCH Act	*Protection of Movable Cultural Heritage Act 1986*
RRS	Resale Royalty Scheme
SMSF	Self-managed Super Funds

ART REGIONS

A	Arnhem
APY	Anangu Pitjantjatjara Yankunytjatjara
C	Central
CD	Central Desert
ED	Eastern Desert
FNQ	Far North Queensland
K	Kimberley
OB	Outback
T	Tiwi
TSI	Torres Strait Islands
WC	West Coast
WD	Western Desert

Glossary

TERMS USED IN THE AEVC REPORTS

Artist	An Aboriginal or Torres Strait Islander person who produces art products.
Art business types	Any party that sells works of art to customers, on behalf of artists, using one of the following models: ***Publicly funded Art Centre or Cultural Centre*** Aboriginal or Torres Strait Islander–owned and/or governed art businesses providing a range of artistic, cultural and entrepreneurial services to a group of artists. Business operations include wholesale, retail and gallery (has exhibition space separate to retail space and holds exhibitions). ***Private art business*** A business that trades in Aboriginal or Torres Strait Islander art products for commercial gain and may also support the development of artists. Private art business operations includes Retailer/Gallery (exhibiting and non-exhibiting, i.e. shop); Retailer/Wholesaler – online only; Retailer/Wholesaler (exhibiting and non-exhibiting, i.e. shop) and Wholesaler (on-sells to other art businesses). ***Mixed business*** This is the same as a private business but with a broader focus: art plus another business activity, such as a restaurant, accommodation or tourist outlet.
Art product categories	1. Paintings and drawings: on canvas, linen, bark, paper, watercolours 2. Textiles and fashion: fabrics, leather, garments, jewellery 3. Works on paper: limited edition prints 4. Sculpture: wood (yidaki/didjeridoo), metal, glass, fibre/weaving, dance machines / dance boards, ceramic, soft sculpture, shell 5. New media: photography, film (video), digital mixed-media, installation
Markets: Primary	This is the market for artworks that are passing through the value chain for the first time, that is, the first sale from artist/Art Centre to gallery, dealer or customer. Money from this sale goes back to the artist/Art Centre rather than passing from one dealer to another, or from an auction house to a gallery, or one collector to another.
Markets: Secondary	The market for works that are transacted further along the value chain – among collectors, auction houses, galleries or dealers. Apart from potential resale royalties, money from these sales is not returned to the artist. This market is not included in this research.
Merchandise products categories	1. Stationery: bookmarks, cards, mousepads, bookmarks, pens 2. Prints/reproductions: posters 3. Homewares: drink containers, crockery, furnishings, manchester, rugs, lampshades, soft furnishings, bar mats 4. Jewellery 5. Sculpture: boomerang, didgeridoo, toys, metal, glass, ceramic 6. Clothing: t-shirts, ties, scarves, garments 7. Trinkets: key rings, spoons

Remote Australia	The concept of remoteness is an important dimension of policy development in Australia. The provision of many government services is influenced by the typically long distances that people are required to travel outside the major metropolitan areas. The purpose of a Remoteness Structure is to provide a classification for the release of statistics that inform policy development by classifying Australia into large regions that share common characteristics of remoteness.

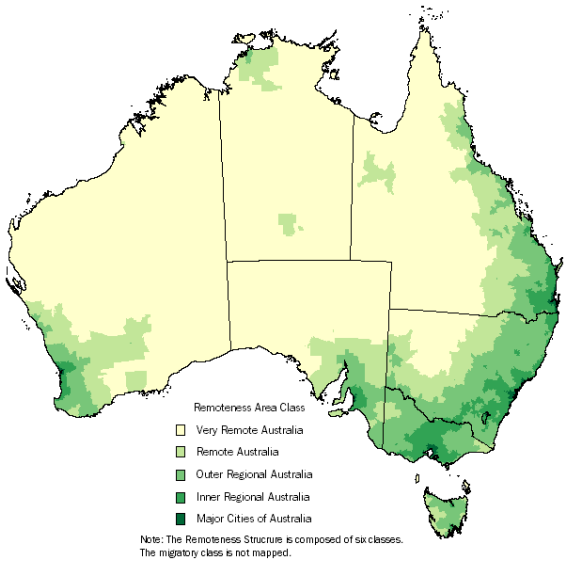


Image source: ABS 2006

Stakeholder	Stakeholders in the Aboriginal and Torres Strait Islander art value chain can be defined as any individual or group that has an interest in the creation, management or sale of Aboriginal and Torres Strait Islander art, or is affected by Aboriginal and Torres Strait Islander art.
Value chain	Value adding activities of an organisation or an entire supply chain. This is used as the reference point for defining the boundaries of an investigation of a product (art works) and/or service to give a value chain analysis.
Visual art products	An original (creative or cultural) product that is made, designed or produced by an Aboriginal or Torres Strait Islander person. Includes paintings, crafts, sculpture, fabric, baskets from any material, bought materials or waste such as fish nets and plastics.

Executive summary

The Art Economies Value Chain (AEVC) project seeks to understand the production and trade of visual art products. The source of the visual art products is remote and very remote Aboriginal and Torres Strait Islander communities; however, the markets for these goods span the globe.

Given the scope and scale of this analysis, issues in the Aboriginal and Torres Strait Islander visual art value chain have been presented in four reports and an accompanying synthesis report. Each report focuses on important economic, social and trade issues in the art value chain. This report describes the methodology of the AEVC project and presents information about each of the art regions in remote Australia. Figure 1 lists the reports, with each report hyperlinked through its title.

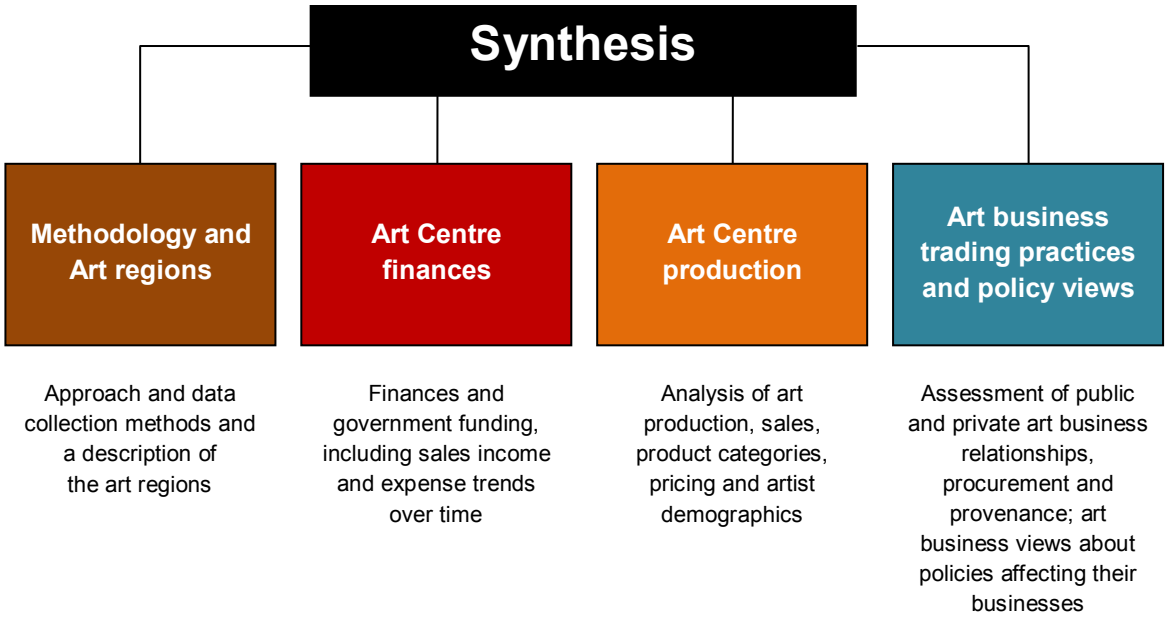


Figure 1: Reports map

SUMMARY OF FINDINGS	
The Art Economies Value Chain project aims to support change and inform Aboriginal and Torres Strait Islander artists and art businesses.	The AEVC project was commissioned by CRC-REP and supported by Southern Cross University and Curtin University. In this series of reports, we draw no conclusions as to the direct and indirect benefits of Aboriginal and Torres Strait Islander art on communities; rather, our objective is to develop an evidence base to enable a better understanding of art production and economic value in these communities and across the art value chain.
Research participants	
Stakeholders included artists, Art Centres, private art businesses and government agencies.	The study was informed by Australian and international art businesses: • 95% of publicly funded Art Centres in remote and very remote Australia participated in the research. • 10,338 Aboriginal and Torres Strait Islander artists' work is included in the analysis. • 136 art businesses (including 12 international businesses) responded to the art value chain survey.
The approach	
The research design used three different methods of data collection to account for the complexity of the data and diversity of the stakeholders.	Major assessments of an industry sector are inherently complex due to the numerous interactions among social and economic systems. This creates the need for a systemic approach to explain the complexity of interactions across time and geography. The experimental design used both quantitative and qualitative assessments of products and processes: • benchmarking analysis to establish measurement across time and between geographical regions • value chain analysis to assess business interactions and production numbers and value, from artists through to customers • surveys to determine social attitudes and policy impacts of public and private businesses.

1. Introduction

In undertaking this research, we have aimed to develop an evidence base for policy and market development decisions. However, when considering the results we also acknowledge that there are boundaries within which we have collected data. Failing to recognise the complexity of an issue can result in 'quick fixes', interventions that have unintended consequences (Woodhead 2010).

Previous work describing the Aboriginal and Torres Strait Islander art industry has primarily used data from the auction sector (Coate 2009, Wilson-Anastasios 2008), with limited attention to other sectors of the value chain. An associated literature review from the Art Economies project (Acker et al. 2013) discusses the art industry, including the development of commercial markets for contemporary and traditional art, the current issues, and the status of available data.

We emphasise that art production and its value to communities are affected by many factors outside of this study such as geography, skills and cultures; for example, the role of managers in Art Centres (Whittle 2013), artist training, the remoteness of Art Centres and associated transport and logistics. Social trends are also an important consideration in an assessment of an industry's products and sales value. While there is an increasing recognition of Aboriginal art and culture in Australia, consumer purchasing behaviour is also fickle; art fashions constantly change and new styles emerge. And while luck, opportunity and being in the right place at the right time also play a role in the success or failure of an artist and an art business, an assessment of these issues is also not included here.

Notwithstanding these challenges, these Art Economies Value Chain reports provide unique insights, using a detailed value chain and benchmarking analysis of the scale of art production in remote Australia and across the art value chain.

This report is set out in two sections: the first explains the methodology and data collection process of the research project; the second describes each art region in terms of its geography, market access, transport logistics, demography and the Art Centres in the area.

2. Methods – benchmarking the art value chain

Value chains are complex systems, bringing together buyers and sellers in a network of relationships and transactions that span distance, time and location. The art value chain is particularly intricate, with cross-cultural elements and discretionary pricing of products that is as much based on perception and fashion as it is on quality and quantity. We have not attempted to assess the attributes of 'quality' or sought to understand why one painting sells for more than another. Rather, we have focused on the business of art; that is, looking at a range of factors – geography, inputs and outputs, production levels and value over time – to present evidence and information about the commerce of remote Aboriginal and Torres Strait Islander art.

The art value chain stakeholders in the project were defined as the **government agencies** that fund the **public art businesses** that support and host the **artists** who produce art products, through to the **private art businesses** who (along with public art businesses) trade in art products (see Figure 2). Three benchmarking criteria were defined to establish commonality of comparisons across the value chain and between data sources (discussed in 2.1):

1. **Spatial**: Art regions (Figure 3), defined by artistic and cultural traits, to measure diversity and product characteristics. Remote Australia was divided into 12 art regions to quantify art production, sales and funding.
2. **Temporal**: While the project sought to understand the changes over the last decade, different time scales were used, reflecting the different data sets that were able to assembled:
    a. **Art Centre (public art business) production and sales data** were from 1980 to 2013 but data after 2003 were most complete; therefore two main date spans were used: 2003–07 and 2008–12. Data from 1980–2002 were only included in analysis of total sales and have been appropriately noted.
    b. **Art Centre profit/loss data** were from 1990/91 to 2012/13, but we primarily used 2004/05–2012/13.
    c. **Government agency data** came from 2000/01 to 2012/13.
    d. **Public and private art business survey data** on business practices over the last five years from 2007/08 to 2011/12, with forward predictions being made through to the 2017/18 financial year.

    Two five-year time brackets were used to measure change and trends across time: 2003–07 and 2008–12. Data prior to 2003 were included in some analyses.
3. **Products**: Art products were defined by several variables, including stock and sold date, price category (sales value), product category (painting, sculpture, works on papers and textiles) and painting size.

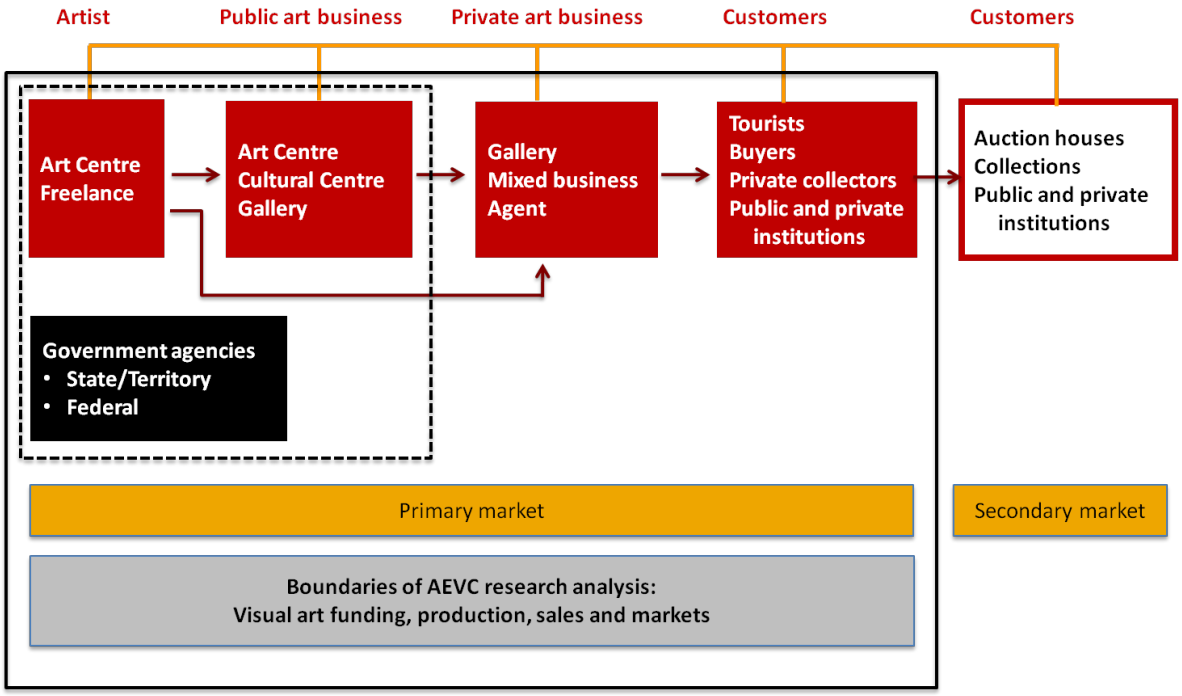


Figure 2: Value chain stakeholders and markets.

The boundaries of the AEVC project (enclosed by the black solid line) are shown in Figure 2. The focus was on the production of art products by Aboriginal and Torres Strait Islander artists for sale (not

ceremonial or cultural purposes) and primary sale of these art products. The secondary auction and gallery markets were not included in the analysis.

To spatially analyse art production across remote Australian production centres, art regions were defined. These art regions represent the primary areas of production in remote Australia and provide a shared analysis tool across all reports. While presenting information nationally is relevant and shown where appropriate, using art regions enables a far more detailed understanding of change and variation, without identifying individual Art Centres. The art regions were based on known areas of art production and grouped by social, cultural and aesthetic characteristics, not governance jurisdictions. Individual Art Centres were then grouped into the respective art regions (Appendix A).

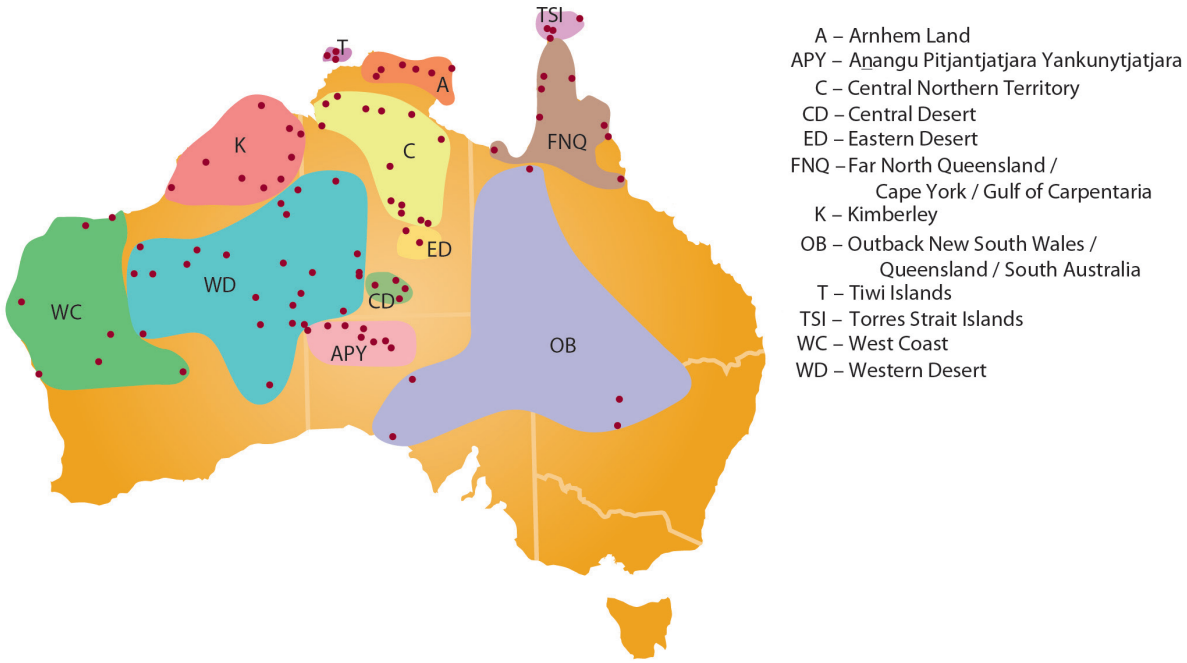


Figure 3: Art regions map showing zones of production across remote Australia.

We assessed Art Centre production and the primary sales of visual art products (paintings, works on paper, sculpture and textiles and fabrics). Primary sales are the first sale of an artwork to a buyer. Some art businesses undertake minor levels of secondary art product sales (these are likely to be included in their responses); this information has a negligible impact on the findings.

The assessment included the range and value of all art products produced by Art Centres (sold or in stock) in remote Australia and the private art businesses that purchase these works. The data from Art Centres and agents were categorised using the same variables where possible to assist with crossover analysis: product category, painting size, artist age, year of sale and sales value. (See the glossary for details of each category.)

Art produced outside of Art Centres has not been measured at the source; however, some data were collected on the scope and scale of non–Art Centre production, enabling reasonable estimates to be made of artists and production across the total remote Aboriginal and Torres Strait Islander art sector.

The role of public funding has been instrumental in enabling the art activities of Art Centres throughout the north and centre of Australia. Funding has helped Art Centres to engage with markets, which in turn has supported an increase in the number of artists and the diversity and number of art products. Data are

presented on the 'inputs and outputs' of these two areas and, where appropriate, connections across to production and sales information is explored. In the next section we explain in more detail the data collection methods and limitations that should be considered when reading the results.

2.1 Data collection

Data were collated from three sources:

1. Art Centres:
    a. production and sales data, primarily in a database format, or other spreadsheet-type form of data
    b. profit and loss statements and/or audits
    c. artists' count.
2. Government agencies: local, State/Territory and Federal arts and arts-related agencies
3. Survey of public and private art businesses.

With any art business there are also a number of factors beyond artist productivity that impact on performance, such as manager competence and experience, facilities and location. But in remote Australia, weather events (floods destroying artworks) and ceremonial activities also have an impact. Notwithstanding these challenges, which are detailed further below, the data analysed and conclusions drawn are based on participation from 81 of 87 Art Centres in remote Australia. This section discusses the determining factors and response rate for each dataset.

2.1.1 Art Centres

From a range of sources, a list of 104 possible Art Centres and art projects were identified across remote Australia (overview in Figure 3). After contacting each centre/project and identifying those that were subsidiaries of other Art Centres, or had closed, ceased trading in art or otherwise changed their business, 87 Art Centres/projects remained. Each of these Art Centres/projects were asked to provide two types of data: production information (from a database or similar stock control system) and profit and loss information (audits or end-of-year financial reports); the response rate for each type of data varied, though overall only six centres/projects provided no sales or production information at all. Factors considered in data collection were that:

- the size, productivity and remoteness of art centres are extremely varied
- the number of Art Centres changes; some regions have more new Art Centres and others have more established Art Centres, with a small number going out of business (see list of remote area Art Centres in Appendix A)
- organisations change (altering their names, or moving from being hosted to being independent, etc.), and funding support and productivity vary across time.

While there has been growth in all art regions over the last decade, there is a relatively small number of stable, continuing Art Centres and projects that span the 10-year time bracket used by the AEVC.

2.1.1.1 Production and sales data

Art Centres that provided product data for 2003–07 represented 41% of the 61 Art Centres operating in these years (see Table 1). There has been an increase in the number of Art Centres; in the period 2008–12, there were 87 Art Centres, with data provided by 44 centres.

Of 94 Art Centres/projects that were operating in remote Australia between 2003 and 2012, 51 (54%) supplied database information and a further 30 (34%) provided summary production information; six Art Centres/projects (7%) did not provide any production data. The quality and quantity of Art Centre data were extremely variable, particularly over time. Therefore, data from 2003 onwards have been used for analysis of change over time. Five-year averages have been used to smooth out gaps, with timeline groups from 2003 to 2007 and 2008 to 2012.

Table 1: Art Centre production data response rates

	2003–2007	2008–2012
Total number of Art Centres	61	87
Number of Art Centres that provided production and sale data	25	44
Percentage of respondents	41%	51%

A range of other anomalies (mainly due to a wide variety of terminology for a field such as ‘date of birth’) have, where possible, been addressed, and where appropriate explained in the results reports. These anomalies and data gaps have somewhat defined the depth of the regional analysis. Some data fields are only meaningful at a national level or for certain regions; for example, nationally only 42% of artists had gender data and 48% had age data, therefore regional comparisons have been limited to tallies of artists. Analysis of gender trends has been undertaken across time at a national level.

2.1.1.2 Profit and loss statements and audits

Table 2: Art Centre audit data response rates

	2003–2007	2008–2012
Total number of Art Centres	61	87
Number of Art Centres that provided audit data	35	69
Percentage of respondents	57%	79%

A majority of Art Centres are incorporated with the Office of the Registrar of Indigenous Corporations and, as such, are required to submit annual audits. These are available online, though the record (especially earlier than around 2008) is patchy. In addition, Art Centres were asked to provide audit information and – for those unincorporated Art Centres – income and expenditure information; these contributions added significantly to the detail of the analysis. Table 2 summarises the response rates from art centres in providing profit and loss and audit information. The data assembled here represent:

- 399 ‘audit years’ (320 audits and 79 profit/loss statements), covering a total of 69 Art Centres in all art regions. All figures are in actual amounts for each year and not adjusted for inflation
- a date span from 1990/91 to 2012/13; however, the recent records are strongest, with 95% of data covering the ten-year period between 2003 and 2012
- a small number of Art Centres with audit records who have ceased trading.

Art Centres in the Central Desert art region are underrepresented. There is a small proportion of incorporated organisations – most Art Centres here are hosted within a larger organisation and/or did not supply data.

Audits and profit/loss information was filtered for key information in order to allow regional and temporal comparisons. Audit information was highly variable across the 354 audits.

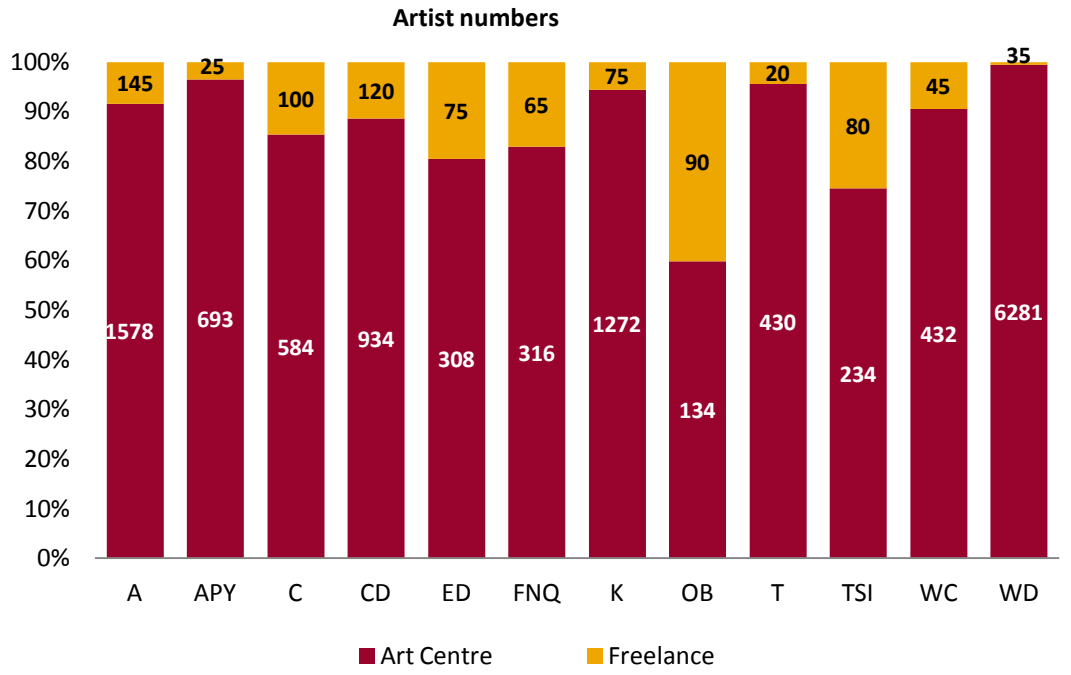
2.1.1.3 Artist count

This research focuses on the production of visual art from remote Australia that is made to sell in the commercial art market – not art products made for cultural, ceremonial or domestic purposes. In line with this, we have defined an artist as an Aboriginal or Torres Strait Island person who produces visual art products in remote and very remote Australia that are for sale. We use two broad categories of artists: **Art Centre artists** whose work is documented and sold by their Centres; and **freelance artists** who primarily have an independent business model, working with one or more agents (which may also include Art Centre). This research focuses on Art Centre artists.

Determining the actual number of Aboriginal and Torres Strait Islander artists working as remote area artists or for various remote area art businesses is complex. Though Art Centres generally keep good records of artist names, other key attributes – such as gender, age or when artists stop producing – are often poorly recorded. Therefore, determining the total number of artists that have ever produced work at an Art Centre is simple (though there are variables here too, given that Art Centres may have operated without a database for various lengths of time), but accurate analyses of the number of artists who produced work in certain time periods is less so. For example, an artist who has stopped work may still sell works in a given year – such a record is likely to be interpreted by the database as an active artist.

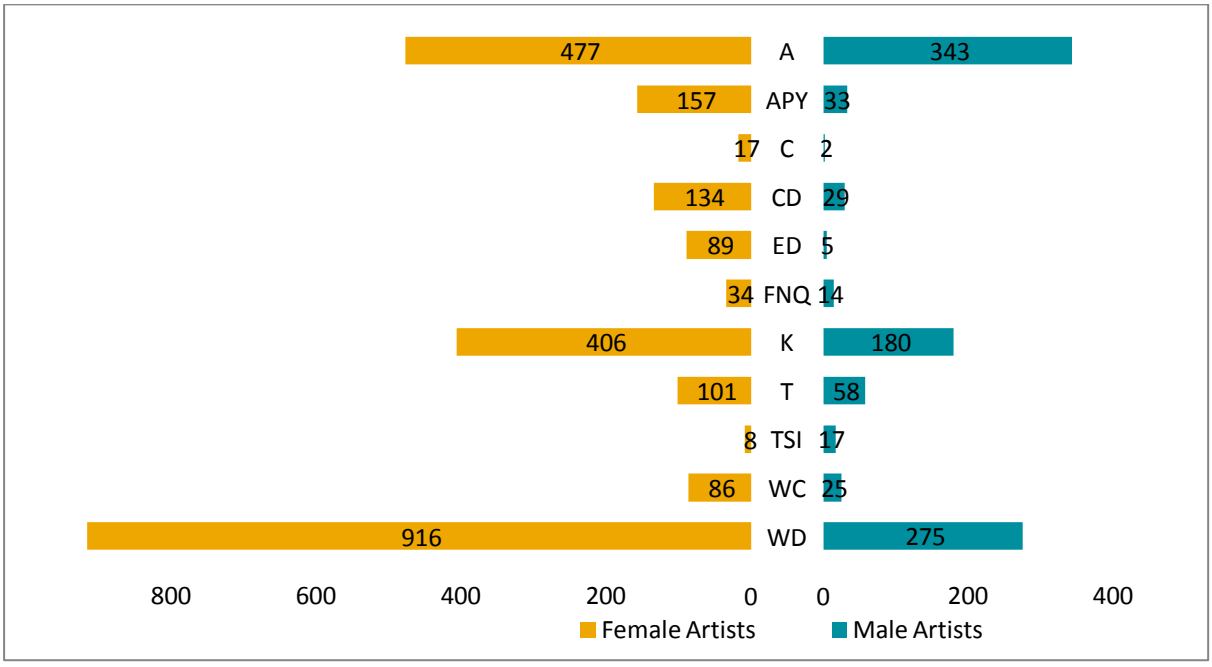
Acknowledging these variables and limitations, we have counted the artists from the data provided by Art Centres and, in consultation with support agencies, estimated the number of freelance artists operating in each region. Figure 4 shows the number and percentage of Art Centre and freelance artists by art region. A total of 14,071 artists were identified in remote and very remote Australia. Of these, 875 were considered freelance artists, leaving an Art Centre artist population of 13,196. In desert regions, freelance artists are most concentrated in the Central Desert region (around Alice Springs), though the artists themselves tend to be drawn from two other regions: Eastern Desert and Western Desert. While the freelance artist group includes some high profile, highly productive artists, the actual number of artists is estimated to be small.

Some artists work with more than one art centre (e.g. an artist may paint with one Art Centre and carve or weave with another or move communities and produce work with a different centre), resulting in some minor double counting. The amount of double counting is likely to vary between regions: the Western Desert, Central Desert and Anangu Pitjantjatjara and Yankunytjatjara regions have probably the highest mobility of artists, spatially and between mediums/Art Centres, and it is estimated that 10–15% of artists allocated to the Western Desert region work for more than one centre.



A = Arnhem; APY = Anangu Pitjantjatjara Yankunytjatjara; C = Central Northern Territory; CD = Central Desert; ED = Eastern Desert; FNQ = Far North Queensland; K = Kimberley; OB = Outback; T = Tiwi; TSI = Torres Strait Islands; WC = West Coast; WD = Western Desert

Figure 4: Art Centre and freelance artists by art region



A = Arnhem; APY = Anangu Pitjantjatjara Yankunytjatjara; C = Central Northern Territory; CD = Central Desert; ED = Eastern Desert; FNQ = Far North Queensland; K = Kimberley; T = Tiwi; TSI = Torres Strait Islands; WC = West Coast; WD = Western Desert

Figure 5: Artist gender by art region (limited data for C and no data for OB regions)

Figure 5 shows the number of artists by gender by art region; more details and context are provided in the associated *Art Centre production* report (Woodhead and Acker 2014), which looks at age and gender in relation to production numbers and sales.

While art regions best represent artistic and cultural groupings, we have also shown the breakdown of artists by State/Territory jurisdiction in Table 3 given that funding is most often provided at a State/ Territory level.

Table 3: Number of artists by State/Territory

	Number of artists	% of artists
NSW	76	0.5%
NT	8,076	57.4%
Qld	725	5.2%
SA	836	5.9%
WA	4,358	31.0%
Total	**14,071**	**100%**

Of the 87 Art Centres, 51 provided data about 10,338 artists. These data form the basis of the analysis of Art Centre production (Woodhead and Acker 2014). That equates to 73% of the total population of artists and 78% of the total Art Centre artist population. Even with some uncertainty around the exact number of artists producing work in remote communities, this represents a significant sample of the artist population. Freelance artists were not further included in this research.

2.1.2 Government agencies

All relevant State/Territory and Federal art and arts/cultural agencies provided information about funding and grants from 2000/01 to 2012/13. Agencies that contributed information[1] were:

- Australian Government Ministry for the Arts: Indigenous Visual Arts Industry Support (IVAIS), Indigenous Cultural Support (ICS), Indigenous Employment Initiative (IEI) programs
- Torres Strait Regional Authority (TSRA)
- Australia Council for the Arts (Ozco)
- Regional Arts Australia: Regional Arts Fund (RAF)
- Western Australian Government Department of Culture and the Arts (DCA) and Department of Aboriginal Affairs (DAA) and WA Lotteries Commission, or Lotterywest (WA)
- ArtsSA, South Australian Government Department of Premier and Cabinet and Department of Communities and Social Inclusion (SA)
- ArtsNT, Aboriginal Benefits Account, Community Gambling Fund (NT)
- Arts Queensland (Qld)
- Arts NSW and Regional Arts NSW (NSW).

The continuity and depth of information varied between agencies. Overall, national agencies were able to provide the most complete records; State/Territory agency records were incomplete with no records

[1] Some of these agencies also collated funding provided by other agencies, such as the (then) Australian Government Department of Families, Community Services, Health and Indigenous Affairs and WA's Regional Development Commissions.

available earlier than 2006/07. Each agency also has a different approach to, and format for[2], the storage and management of funding information. Most agencies have changed these systems at various times, and/or with bureaucratic restructures, records have been archived or removed as part of these moves. Ozco provided the most continuous records. All funding amounts are given in actual amounts provided each year and are not adjusted for inflation.

This variability led to a range of data analysis challenges. One of the primary challenges was that this research is concerned with Aboriginal and Torres Strait Islander visual arts activities in remote Australia, focusing on those who are 'in business' in some way (primarily Art Centres but also other agencies providing similar services). However, funding bodies do not record remoteness or the status of art projects or centres in a consistent or accurate way. In addition, numerous hybrid arts projects are supported. The result is that filtering data to find the research target group is somewhat imperfect; for example, an urban-based group may conduct a project in remote regions; a non-Aboriginal group may do work, including selling artworks, with Aboriginal artists; a dance project may include a visual arts component; or a peak body may auspice a project on behalf of a community. Some funding is also provided for activities in more than one year, translating as a spike of funding.

Funding is also provided for a wide range of purposes, some with definite outcomes (a specific arts project, such as a printmaking workshop, or a particular supply, such as a new vehicle), some with more general industry development aims; it is this latter category that generally subsidises the operational costs of Art Centres. The funding environment is a diverse one and for some Art Centres includes corporate sponsorship and funding from non-arts sources, such as a grant or strategic intervention by other than an arts agency. Where possible, this non–art agency information is included, but the record is likely incomplete.

2.1.3 Public and private art businesses

To complement the data provided by Art Centres and to fill in some of the gaps in the value chain, including key information about private art businesses, a value chain survey was developed (see Appendix A for the value chain survey questions in the associated *Art business trading practices* report [Woodhead 2014]).

The value chain survey had a series of linked sections that gathered information about art industry stakeholders (artists, Art Centres, galleries and agents) and their products, trading practices and customers, using these broad headings:

- socio-demographics
- business enterprises, products and customers
- art and merchandise products
- trading practices
- attitudes to policies and views on the way forward.

The majority of quantitative data questions were supported by qualitative responses, thereby providing a rich and diverse insight into the Aboriginal and Torres Strait Islander art industry.

Invitations to participate in the survey were sent by email to approximately 340 art businesses, comprising 260 private art businesses (galleries and agents) and 80 public Art Centres and galleries. The survey

[2] For example, some agencies work in financial years, others in calendar years, or there are differences recording when grants are awarded and when they are paid.

commenced in February 2013 and was closed in July 2013. Each business was requested to complete one survey. Follow-up emails and phone calls to those who had not completed the survey were conducted between April and June 2013. Approximately 50 of the private art businesses contacted had ceased trading, identified either through their phone number being disconnected or they self-declared. Some owners and managers represented multiple businesses, and these respondents completed one survey for all their businesses.

The total number of responses was 139, with 136 answering 'Yes' to willingness to participate. Of those, 126 answered 'Yes' to the question 'Do you sell Aboriginal and/or Torres Strait Islander art or merchandise?' thereby enabling them to commence the survey. Eighty-five respondents (67%) completed the entire survey; the remainder completed parts of the survey.

Most questions were optional, and some questions were only visible to respondents based on their responses to earlier either/or questions, for example, business category (public or private), position in value chain (buyer or seller), business location (Australian or international) and trading categories (art products or merchandise). At the conclusion of the survey, respondents were asked whether they would like to stay in touch and would they be available for follow-up interviews; 65% of respondents agreed to a follow-up interview, and 90% said they would like to stay in touch.

3. Art regions

This section discusses each art region's geography, demographics, art production and market access considerations. Appendix A details the Art Centres in each region and the affiliations.

3.1 Arnhem Land: Northern Territory

The Arnhem Land region encompasses the north-eastern portion of the Northern Territory. The main language in the region is Yolgnu Matha, with distinct dialects across the region.

There are two towns, each on opposite sides of the region, with a number of major and many smaller communities and outstations, mostly along the northern coast. The two towns are Nhulunbuy (Gove), on the north-eastern coast of Arnhem Land and Jabiru, on the western edge, between Arnhem Land (native title) and Kakadu National Park. However, the road network is very limited – outside of the main towns and communities there are no paved roads. While there is a network of unsealed roads, they negotiate major rivers (some tidal) and are subject to significant wet season flooding. Small aircraft deliver mail and passengers. Freight for most communities is delivered by weekly (or less frequently) barge from Darwin. There is significant mining activity in the area (uranium in Jabiru and bauxite in Gove) and an important tourism industry associated with Kakadu National Park.

3.1.1 The art and Art Centres

Art from the Arnhem region forms a distinctive genre of Aboriginal art. Art and artists from this region have made a major contribution to the Aboriginal and Torres Strait Islander art sector (nationally and internationally), and the work remains prominent and widely recognised.

A wide variety of artworks are produced. Painting (with ochre) is common in the region and applied to a range of materials, including natural barks, poles and 3D objects. Three-dimensional works (carvings,

weavings, sculpture) dominate art production and include the *yidaki* (didgeridoo), which originates from this region. Digital arts are an emerging practice, as are mixed media works.

There are six operating Art Centres, with considerable variability in size, performance and history. The majority of Arnhem Art Centres are older; several of Australia's longest operating centres are found here. There are also some additional art projects (Alyangula, Marrawuddi) operating on a more casual basis. The two most accessible Art Centres (Injalak and Buku Larrnggay) have a gallery/retail space. Other Art Centres display works, but with few visitors; this is of limited importance. Most Arnhem Art Centres service a network of outstations, which are numerous and relatively active compared to other regions in Aboriginal and Torres Strait Islander Australia.

Table 4: Arnhem Land Art region, NT

ARNHEM LAND: NORTHERN TERRITORY				
Total Aboriginal or Torres Strait Islander population[1]			7,095	
Total number of artists[2]			1,723	
Percentage of all Aboriginal or Torres Strait Islander artists			12%	
Artists with gender and age data (48% of Art Centre data)				
Female artists			477	
Male artists			343	
Artist mean date of birth			1962	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products			18,761	
Mean value of all products			$108	
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	42%	1%	0%	57%
Percentage by sales value	59%	0%	1%	40%
Mean value	$152	$52	$370	$75
Art Centre audit				
Total government funding[3]			$15,949,491	
Total sales recorded from 73% of possible audits[4]			$10,780,845	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 73% of the total audits from all six Art Centres were available.

3.2 Anangu Pitjantjatjara Yankunytjatjara Lands: South Australia

The Anangu Pitjantjatjara Yankunytjatjara (APY) Lands are a desert region of northern South Australia that, while culturally/linguistically part of the wider western desert grouping, forms a distinct bloc of Art Centres. The closest town is Alice Springs (250–500 kilometres to the north), or Yulara village provides some services for the western section.

There are 10 main communities and a number of smaller communities and outstations. Two related languages are spoken: Pitjantjatjara (western areas) and Yankunytjatjara (central and eastern areas).

The Stuart Highway forms the eastern edge of the APY region. There is one main east–west access road (unsealed) linking most communities; there are some other minor roads between communities and outstations. Regular small aircraft flights deliver mail and passengers. There is little economic activity in the region except art production, though some mining exploration is underway. Tourism is very limited, though less so closer to the Stuart Highway.

3.2.1 The art and Art Centres

There are seven Art Centres, with a varied size, scope and history, representing a mix of new and old, including one of Australia's longest continuing art communities, Ernabella, which has been continually providing art studio activities since 1948. This region has had significant commercial and artistic success in recent years, with high profile exhibitions, critical acclaim and strong sales. The majority of the artworks produced are acrylic paintings on canvas/linen. However, Ernabella has a strong history of silks/fabrics and a continuing tradition of ceramics; printmaking is undertaken by most Art Centres on a project basis, and weaving and carving are common. Some new media (digital photography, primarily) takes place. While none of the Art Centres has a gallery/shop, most have a space to hang paintings, though visitors are relatively few. Some of the (mainly easterly) APY Art Centres display works in a gallery at the Marla roadhouse on the Stuart Highway. All Art Centres have a strong network of commercial galleries; these partnerships form their primary marketing and sales strategy.

Table 5: Anangu Pitjantjatjara Yankunytjatjara Lands Art region, SA

ANANGU PITJANTJATJARA YANKUNYTJATJARA LANDS: SOUTH AUSTRALIA				
Total Aboriginal or Torres Strait Islander population[1]			2,071	
Total number of artists[2]			718	
Percentage of all Aboriginal or Torres Strait Islander artists			5%	
Artists with gender and age data (26% of Art Centre data)				
Female artists			157	
Male artists			33	
Artist mean date of birth			1967	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products			6,441	
Mean value of all products			$437	
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	89%	0%	9%	2%
Percentage by sales value	97%	0%	3%	0%
Mean value	$479	0%	$122	$62
Art Centre audit				
Total government funding[3]			$13,334,205	
Total sales recorded from 83% of possible audits[4]			$14,654,456	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 83% of the total audits from all seven Art Centres were available.

3.3 Central: Northern Territory

The Central region is the area north of Alice Springs, through to the Katherine/Daly River region – the middle portion of the NT. This region borders desert regions of the south, west and east and Arnhem Land (and Darwin) to the north. There is considerable cultural and language variation, ranging from the western desert language group in the south to smaller, distinct language groups further north such as Daly and Mindi. There are a variety of enterprises and economic activities underway in the area, ranging from mining to pastoral to tourism.

There are four towns in, or close to the region: Alice Springs (out of region to the south), Tennant Creek (in the middle), Borroloola (eastern edge) and Katherine (northern edge). A good transport network exists in the region, including road and air transport for both passengers and freight. The Stuart Highway runs through the centre of the central region, with major branches heading east (to Mt Isa, Qld) and west (to Kununurra, WA). There is a network of minor and unsealed roads, connecting communities and stations. Some areas, particularly in the Daly, Victoria River and Gulf regions, can be heavily impacted by the wet season. Tourism is important but highly seasonal. Three of the Art Centres have a shopfront/gallery (two in Katherine and Borroloola) and one of the Art Centre/projects has a combined gallery, café, interpretive centre and retail space (Tennant Creek).

Table 6: Central Art region, NT

CENTRAL: NORTHERN TERRITORY	
Total Aboriginal or Torres Strait Islander population[1]	8,735
Total number of artists[2]	684
Percentage of all Aboriginal or Torres Strait Islander artists (no gender or age data)	4%
Artists with gender and age data (3% of Art Centre data)	
Female artists	17
Male artists	2
Art production and sales: 2007/08–2011/12 (Art Centre data)	
Number of products	2,706
Mean value of all products	$469
Art Centre audit	
Total government funding[3]	$10,459,461
Total sales recorded from 44% of possible audits[4]	$2,221,779

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 44% of the total audits from all ten Art Centres were available.

3.3.1 The art and Art Centres

A wide variety of mediums are used in the region, including fabrics, carvings and prints, though paintings on canvas dominate. Aside from a small number of exceptions, no artists from this region have gained national recognition, nor have any of the Art Centres had any sustained commercial profile. None of the Art Centres have a strong network of commercial galleries, though some Art Centres have a modest exhibitions program.

There are eight Art Centres and two service organisations in the Central region, with varied size, operations and history:

- One organisation is a centralised gallery, cultural centre, artists' studio/support service.
- One organisation has a Tennant Creek–based office providing outreach and arts-support services to surrounding communities and outstations.
- Of the eight Art Centres, seven are located in their home community; the eighth has an artists' studio in their home community and a shopfront/gallery in Katherine.

3.4 Central Desert: Northern Territory

The Central Desert region encompasses Art Centres and projects within an approximate 100 km radius of Alice Springs. Alice Springs is traditional Arrente land (eastern and western) – a member of the overall western desert group of languages. Alice Springs is the primary service centre for much of central Australia and as a consequence supports numerous other language groups, for example, Luritja, Warlpiri, Kaytetye. Alice Springs and the central desert are a significant tourist destination. There is also a strong pastoral industry in the region. The Stuart Highway runs north–south through Alice Springs. There are two main roads to the west, Larapinta and Namatjira Drives, and lesser roads to the south to Titjikala and Santa Teresa, and east.

Table 7: Central Desert Art region, NT

CENTRAL DESERT: NORTHERN TERRITORY				
Total Aboriginal or Torres Strait Islander population			6,596	
Total number of artists			1,054	
Percentage of all Aboriginal or Torres Strait Islander artists			7%	
Artists with gender and age data (15% of Art Centre data)				
Female artists			134	
Male artists			29	
Artist mean date of birth			1967	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	93%	0%	2%	5%
Percentage by sales value	92%	0%	2%	6%
Mean value	$301	0%	$375	$398
Art Centre audit				
Total government funding			$12,226,977	
Total sales recorded from 24% of possible audits			$1,326,424	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[1] The number includes both Art Centre artists and artists outside of Art Centres.

[1] From 2000/01 to 2012/13.

[1] Shows the level of sales data available; e.g. in this region, 24% of the total audits from all nine Art Centres were available.

3.4.1 The art and Art Centres

A very wide range of mediums and artistic practices are used in this region. While paintings on canvas (including a significant water colour tradition) remain the primary artistic medium, a strong 3D tradition continues, with ceramics and sculptures as well as hybrid artworks, such as painting on 3D objects. Most

of the Alice Springs–based Art Centres have a gallery/shop, including some with relatively sophisticated gallery and retail activities, while the community-based organisations vary in the facilities they offer.

The market situation is complex, with two other leading but 'out of region' Art Centres (representing mainly Western Desert artists) operating a shopfront/gallery. There are also numerous commercial galleries and dealers operating in and around Alice Springs.

The nine Art Centres/projects represent a wide spectrum of operating models, sizes, specialisations and history. Commercial gallery representation varies considerably across the nine Art Centres – a small minority have strong commercial partnerships. Of the nine, four service individual communities; the other five are based in Alice Springs and, while generally working with a target group of artists in the community, often service a diverse group of artists.

3.5 Eastern Desert: Northern Territory

The Eastern Desert art region encompasses a small number of Art Centres operating in the desert area north-east of Alice Springs. The languages are part of the overall western desert language family and share some overlaps with Luritja/Arrente; the main languages are Kaytetye, Alyawarre and Anmatyerre languages.

While Art Centre activity is relatively limited in this region, the Eastern Desert represents a distinct and important artistic grouping; the region has produced one of Australia's most prominent artists and has an ongoing artistic tradition that plays a significant role in the wider Aboriginal and Torres Strait Islander art market.

Alice Springs is the service centre for the Eastern Desert region. The Stuart Highway loosely marks the western boundary of the region, with a small network of unsealed roads (the Sandover and Plenty Highways) that link through to western Queensland. There is a long and ongoing history of pastoral activity.

3.5.1 The art and Art Centres

Acrylic paintings on canvas are the dominant artistic medium, though some 3D works (carvings and weaving) are also produced. The region has two operating Art Centres, both working with a discrete community and/or group of outstations. One of the Art Centres has had some limited commercial success. One of the Art Centres offers a shopfront/gallery and is easily accessible for tourists. Aside from tourists travelling along the Stuart Highway, there are no other local markets. The galleries of Alice Springs or further afield are the main commercial opportunity.

Table 8: Eastern Desert Art region, NT

EASTERN DESERT: NORTHERN TERRITORY				
Total Aboriginal or Torres Strait Islander population[1]			900	
Total number of artists[2]			383	
Percentage of all Aboriginal or Torres Strait Islander artists			2%	
Artists with gender and age data (26% of Art Centre data)				
Female artists			89	
Male artists			5	
Artist mean date of birth			1972	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products			1363	
Mean value of all products			$398	
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	85%	0%	0%	15%
Percentage by sales value	93%	0%	0%	7%
Mean value	$438	0%	0%	$184
Art Centre audit				
Total government funding[3]			$3,446,358	
Total sales recorded from 100% of possible audits[4]			$746,723	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 100% of the total audits from all two Art Centres were available.

3.6 Far North Queensland: Queensland

This region encompasses all of Cape York Peninsula as well as the islands of the Gulf of Carpentaria and a small area of remote Queensland south of Cairns (the Cardwell region). Far North Queensland has numerous language groups, including the western cape (Wik, Kugu, etc.), the eastern cape (rainforest languages such as Kuku Yalanji) and gulf languages (such as Lardil and Ganggalida). There is a wide range of economic activity in the region, ranging from pastoral and grazing to fishing and mining; tourism is a key economic activity throughout the region, though it is seasonal.

Several regional centres are within or bordering Far North Queensland, including Cairns, Cooktown and Weipa, as well as numerous smaller towns such as Coen and Bamaga. Road transport is limited to a small number of main roads (generally unsealed). The main road north is the Peninsula Developmental Road, running along the centre of Cape York from Cairns to Weipa. All roads can be significantly affected by wet season flooding. There are regular aircraft flights for mail and passengers. Freight for many communities is delivered by regular barge from Cairns and/or Normanton.

Table 9: Far North Queensland Art region, Qld

FAR NORTH QUEENSLAND: QUEENSLAND	
Total Aboriginal or Torres Strait Islander population[1]	6802
Total number of artists[2]	381
Percentage of all Aboriginal or Torres Strait Islander artists	2%
Artists with gender and age data (26% of Art Centre data)	

Female artists			34	
Male artists			14	
Artist mean date of birth			1965	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products			2283	
Mean value of all products			$624	
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	95%	0%	1%	4%
Percentage by sales value	97%	0%	1%	2%
Mean value	$639	0%	$468	$325
Art Centre audit				
Total government funding[3]			$15,232,071	
Total sales recorded from 60% of possible audits[4]			$6,375,034	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 60% of the total audits from all eight Art Centres were available.

3.6.1 The art and Art Centres

The Art Centres of Far North Queensland produce a very wide range of artworks. Painting (primarily acrylic on canvas/paper) dominates, but there are strong artistic traditions in other mediums, including carving, weaving and other sculpture, printmaking and more. Art from this region is – with a small number of exceptions – new to the national art industry and has had limited and/or variable success.

Only a small number of Far North Queensland Art Centres have had any significant commercial and artistic success, and most Art Centres are notably smaller than those in other art regions (both in numbers of artists and in sales). There are eight Art Centres, with enormous variability in size, performance and history. Most of the Art Centres have some form of gallery/retail space.

3.7 Kimberley: Western Australia

The Kimberley art region has a long history of Aboriginal art; some of Australia's most iconic artists and art styles are produced here. The region encompasses four main Aboriginal language families – Worrorra, Jarrakan, Bununban and Nyulnyulan – from which there were an estimated 30 languages.

The region is defined by its topographic and logistical situation, with the road between Kununurra in the east and Broome in the west forming the southern boundary of the area known as 'the Kimberley'. The area has enormous variability in landforms, including some of Australia's largest river systems, some of which border desert regions in the south. There is widespread pastoral and grazing activity, with concentrated horticulture in the Kununurra region. Tourism is important but highly seasonal. The region has one main road (sealed but subject to wet season floods), the Great Northern Highway, linking the area's towns: Broome, Derby, Fitzroy Crossing, Halls Creek and Kununurra. There is also one secondary road, the Gibb River Road, which links Kununurra and Derby, as well as numerous minor roads. Air travel (mail plane, etc.) is commonly used for passengers and freight.

Table 10: Kimberley Art region, WA

KIMBERLEY: WESTERN AUSTRALIA				
Total Aboriginal or Torres Strait Islander population[1]				4,877
Total number of artists[2]				1,347
Percentage of all Aboriginal or Torres Strait Islander artists				10%
Artists with gender and age data (44% of Art Centre data)				
Female artists				406
Male artists				180
Artist mean date of birth				1969
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products				21,341
Mean value of all products				$507
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	56%	0%	17%	27%
Percentage by sales value	90%	0%	8%	2%
Mean value	$916	$0	$247	$50
Art Centre audit				
Total government funding[3]				$13,060,721
Total sales recorded from 63% of possible audits[4]				$14,654,456

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 63% of the total audits from all eight Art Centres were available.

3.7.1 The art and Art Centres

The majority of the artworks produced are paintings on canvas/linen. However, many artists paint with ochre, rather than acrylic paint. Figurative paintings are more common here than in other art regions, where abstract paintings tend to dominate. Printmaking and/or working on paper are also common mediums. Limited quantities of other art products are produced: primarily painted or carved boab nuts. Digital arts are a minor, emerging practice.

The Kimberley region has eight Art Centres/groups, four of which are among Australia's largest and highest profile centres, with similar operating models and histories. The other four are smaller; three of them are project-based arts activities. Six Art Centres have a shop and/or gallery onsite, complementing an exhibitions program and commercial gallery partnerships that are national and international in reach.

3.8 Outback: South Australia, New South Wales and Queensland

The Outback art region encompasses a huge area of western New South Wales, western Queensland and central South Australia. While this region has limited artistic or cultural connections, the widely distributed Art Centres/projects face similar conditions. There is tourism activity in some areas, though it is often seasonal. There is also considerable mining activity, and a large pastoral/grazing sector is active throughout the Outback region.

A number of Aboriginal language groups are found in the Outback region, including Kalkadoon (Queensland), Kokatha and Mirning (South Australia) and Barkindji (New South Wales). The region has

seen considerable disruption to local culture/language and also significant movement between groups, both within the Outback region and to/from Outback to other regions.

Major towns include Mt Isa, Ceduna, Coober Pedy and a number of inland New South Wales towns such as Cobar, Lightning Ridge and Wilcannia. There is a good road network throughout most of the region, as well as numerous secondary and minor roads linking communities and towns. There are also regular commercial flights and reasonable freight connections.

Table 11: Outback Art region, SA

OUTBACK: SOUTH AUSTRALIA, NEW SOUTH WALES AND QUEENSLAND	
Total Aboriginal or Torres Strait Islander population[1]	1,417
Total number of artists[2]	224
Percentage of all Aboriginal or Torres Strait Islander artists	2%
Art Centre data – Not available	
Art Centre audit	
Total government funding[3]	$7,632,938

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

3.8.1 The art and Art Centres

The majority of the artworks produced are acrylic paintings on canvas/linen, with some other works such as carvings, fibre, printmaking and screen-printing occurring on a project-basis. The three art projects and one Art Centre generally have access to, or provide some form of, shop, gallery or marketing. Almost none of them have commercial partnerships beyond their immediate community; artworks are displayed and sold locally. There is only one recognised Art Centre in the Outback region; the arts projects are often associated with, or supported by, another organisation. There is no industry recognition and only limited commercial interest in artists from the Outback region.

3.9 Tiwi: Northern Territory

The Tiwi art region encompasses two large islands north of Darwin, the Tiwi Islands. The main language is Tiwi. There is one community on Bathurst Island, Nguiu, which is the largest community in the Tiwi Islands. There are two communities on Melville Island (Australia's second largest island), Milikapiti (Snake Bay) and Pirlangimpi (Garden Point). The two islands are separated by the narrow Apsley Strait.

Darwin is the nearest service centre, accessible by plane (passengers) and barge (freight). There are some minor roads (unsealed) on the islands, linking communities and sites. There is some forestry industry on the islands, an aborted mining attempt and a minor tourism industry.

Table 12: Tiwi Art region, NT

TIWI: NORTHERN TERRITORY				
Total Aboriginal or Torres Strait Islander population[1]			2,345	
Total number of artists[2]			450	
Percentage of all Aboriginal or Torres Strait Islander artists			3%	
Artists with gender and age data (35% of Art Centre data)				
Female artists			101	
Male artists			58	
Artist mean date of birth			1969	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products			5472	
Mean value of all products			$523	
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	68%	4%	13%	15%
Percentage by sales value	81%	4%	8%	7%
Mean value	$916	$60	$247	$50
Art Centre audit				
Total government funding[3]			$5,353,370	
Total sales recorded from 93% of possible audits[4]			$4,680,315	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 93% of the total audits from all three Art Centres were available.

3.9.1 The art and Art Centres

A wide variety of artworks are produced in the Tiwi region. While painting (with ochre) dominates, it is applied to a range of materials, including canvas, natural barks, paper, poles and found materials. Three-dimensional works (carvings, weavings, sculpture) are a strong and ongoing practice, as is ceramics – both in domestic and sculptural forms. Fabric and textiles are significant mediums. With some visual similarities to the art from Arnhem Land, across the ocean to the south east, Tiwi art has an established place in the Aboriginal and Torres Strait Islander art sector. Art and artists from this region have featured prominently in the history, development and success of the sector.

There are three Art Centres on the Tiwi Islands, one in each community. The Art Centres are long-established, with Tiwi Design in Nguiu one of Australia's oldest. All three Art Centres have a gallery/retail space and have a similarly sized and focused operational model. All three Art Centres partner with commercial galleries, with some Tiwi artists particularly sought after in the art market. The Tiwi Art Centres also own a marketing initiative, Tiwi Art Network (TAN), based in Darwin that assists with promotion, marketing and advocacy.

3.10 Torres Strait Islands: Queensland

The Torres Strait Islands region encompasses the islands off the northern tip of Cape York. There are more than 200 islands in the region, with 17 communities/townships on 16 of those islands. There are two main

language groups in the Torres Strait Islands region: in the Eastern Islands the traditional language is Meriam Mir, while the Western and Central Island groups speak Kala Lagaw Ya.

There is one main town/service centre – Thursday Island – that links the Torres Strait Islands region to Cairns and is the overall transport, logistics and political hub of the region. The region has limited economic opportunities, particularly on the outer islands. Some small-scale ocean harvesting (crayfish, pearls) exists, as does micro-tourism in the southern part of the islands.

There are scheduled flights for freight and passengers to all islands. Freight is delivered by regular barge from Cairns. Tourism, while increasing, is coming off a small base and is highly seasonal.

Table 13: Torres Strait Islands Art region, Qld

TORRES STRAIT ISLANDS – QUEENSLAND				
Total Aboriginal or Torres Strait Islander population[1]			3,009	
Total number of artists[2]			314	
Percentage of all Aboriginal or Torres Strait Islander artists			1.8%	
Artists with gender and age data (9% of Art Centre data)				
Female artists			8	
Male artists			17	
Artist mean date of birth			1980	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products			767	
Mean value of all products			$200	
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	0%	9%	60%	31%
Percentage by sales value	0%	2%	63%	34%
Mean value	0%	$54	$211	$225
Art Centre audit				
Total government funding[3]			$10,492,324	
Total sales recorded from 93% of possible audits[4]			$1,448,639	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[2] The number includes both Art Centre artists and artists outside of Art Centres.

[3] From 2000/01 to 2012/13.

[4] Shows the level of sales data available; e.g. in this region, 93% of the total audits from all three Art Centres were available.

3.10.1 The art and Art Centres

Torres Strait Islands Art Centres produce a wide range of artworks. Painting is only a minor practice here, with carving/sculpture (including Australia's most northerly metal foundry), fabric and, in particular, printmaking, dominating. Art from this region has gained some limited commercial recognition. All Torres Strait Islands Art Centres are new, having been established since 2007.

There are three Art Centres and a regional cultural centre that coordinates art services (supporting production through to exhibitions and marketing). All three Art Centres have some form of gallery/display space, but visitors are rare. The cultural centre has a wide range of facilities, including gallery, museum, archive, shop, café and dance ground. There are freelance artists on all the islands.

3.11 West Coast: Western Australia

The West Coast region is a large area of Western Australia, encompassing a variety of physical, social and cultural sub-regions. The West Coast region covers Art Centres that are culturally and physically outside of the desert and Kimberley regions and includes the mining towns (old and new) of the Pilbara and Gascoyne areas. Two broad Aboriginal cultural groups are represented, Yamaji and Wongai (Wankai), though a range of distinct languages are spoken (e.g. Badimia, Yindjibarndi, etc.).

There is widespread pastoral and grazing throughout the region and a moderate tourism industry, but most economic activity is related to the extractive industries. This has enabled some Art Centres to create strong partnerships with resource companies. Major towns include Port Hedland, Roebourne, Carnarvon, Geraldton and Meekatharra. There are two highways in the region, one inland and the other along the coast. There are numerous secondary and minor roads linking communities and towns and regular commercial flights and freight connections.

3.11.1 The art and Art Centres

The majority of the artworks produced are acrylic paintings on canvas/linen with some local groups of artists working with fibre/weaving and, to a lesser extent, carvings. The region has many newer Art Centres/projects (a majority were set up since 2007), few recognised artists and a very limited industry profile. There are seven Art Centres/projects, with considerable variability in size, performance and history. All seven centres have access to, or provide a shopfront and/or gallery.

Table 14: West Coast Art region, WA

WEST COAST: WESTERN AUSTRALIA				
Total Aboriginal or Torres Strait Islander population[1]				7,469
Total number of artists[2]				477
Percentage of all Aboriginal or Torres Strait Islander artists				3%
Artists with gender and age data (23% of Art Centre data)				
Female artists				86
Male artists				25
Artist mean date of birth				1970
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products				2756
Mean value of all products				$794
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	99%	Less than 1%	Less than 1%	0%
Percentage by sales value	99%	0%	0%	0%
Mean value	$851	$241	$82	0%
Art Centre audit				
Total government funding[3]				$6,150,541
Total sales recorded from 49% of possible audits[4]				$3,091,370

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[1] The number includes both Art Centre artists and artists outside of Art Centres.

[1] From 2000/01 to 2012/13.

[1] Shows the level of sales data available; e.g. in this region, 49% of the total audits from all seven Art Centres were available.

3.12 Western Desert: Northern Territory and Western Australia

With its distinctive dot-painting tradition, the Western Desert is emblematic of Aboriginal and Torres Strait Islander art. It was in the Western Desert community of Papunya that acrylic on canvas/board painting first happened on a commercial scale in the early 1970s, leading to the establishment of Australia's first remote area artists' cooperative, or Art Centre, which is still operating.

The Western Desert art region overlays much of the western desert language bloc and includes key languages such as Martu Wangka, Kukatja, Warlpiri and Ngaanyatjarra. The major deserts include the Tanami, Great Sandy, Little Sandy, Great Victoria and Gibson deserts. Alice Springs is the main service centre for the region, via three main access roads (unsealed, subject to closure and intermittently maintained): the Tanami Track, the Great Central Road and the Kintore /Gary Junction roads. Numerous secondary roads and tracks, usually in poor condition, link communities or run between the main roads. Air travel is commonly used for passengers and freight. The resort town of Yulara (next to Uluṟu–Kata Tjuṯa National Park) is the only 'town' within the Western Desert region and has access to some commercial flights, accommodation, shops and other services.

Table 15: Western Desert Art region, NT and WA

WESTERN DESERT: NORTHERN TERRITORY AND WESTERN AUSTRALIA				
Total Aboriginal or Torres Strait Islander population[1]			8,118	
Total number of artists[2]			6,316	
Percentage of all Aboriginal or Torres Strait Islander artists			45%	
Artists with gender and age data (19% of Art Centre data)				
Female artists			916	
Male artists			275	
Artist mean date of birth			1965	
Art production and sales: 2007/08–2011/12 (Art Centre data)				
Number of products			131,661	
Mean value of all products			$400	
Art products	**Painting**	**Textile**	**Works on paper**	**Sculpture**
Percentage by number of products	75%	0.2%	3%	22%
Percentage by sales value	94%	0.05%	2%	4%
Mean value	$531	$121	$228	$76
Art Centre audit				
Total government funding[3]			$19,859,047	
Total sales recorded from 65% of possible audits[4]			$34,336,486	

[1] This is the total Aboriginal and Torres Strait Islander population of the communities/towns in which the region's Art Centres are located, based on 2011 census results.

[1] The number includes both Art Centre artists and artists outside of Art Centres.

[1] From 2000/01 to 2012/13.

[1] Shows the level of sales data available; e.g. in this region, 65% of the total audits from all 19 art centres were available.

3.12.1 The art and Art Centres

The majority of the artworks produced are paintings on canvas/linen, but there are important subsets of artists who carve (*puṉu*) and weave (*tjanpi*) objects and sculptures, using a mixture of traditional and

contemporary mediums. Other art forms are practiced, including digital arts and printmaking, though these are usually small, more localised activities.

A high proportion of Australia's leading Aboriginal artists are from the Western Desert region, and artists and artwork from here feature prominently in the commercial art market. Art of the region is, arguably, the leading contributor to the national and international phenomenon of Aboriginal and Torres Strait Islander art.

The region contains 19 Art Centres (18 in the main section of Appendix A and Yaruman Artists, which closed in 2010), almost twice as many as any other region. These Art Centres range from some of Australia's oldest to some of the newest, though most have a similar operating philosophy and business model. Many Art Centres have a gallery space/shop front as part of their Art Centre for onsite sales and encouraging visitors. Four Art Centres also have a retail gallery in either Alice Springs or Uluru/Yulara. Seven Art Centres have formed a marketing project, Western Desert Mob (WDM).

Appendix A: Art Centres and art regions – summary list

This table provides an overview of the 87 art centres identified by the AEVC project and lists some of their attributes as well as a summary of the data they contributed to the data analysis. The art businesses are sorted by Art Region (Figure 1).

Table A 1: Aboriginal and Torres Strait Islander publicly funded art businesses

Art Region	Name of publicly funded art business	State	Community	Start	Status	Website	Peak body	Production Data
A	Buku Larrnggay Mulka	NT	Yirrkala	1976	Incorporated	Yes	ANKAAA	Artist Management System
A	Bula'bula Arts	NT	Ramingining	1990?	Incorporated	Yes	ANKAAA	Artist Management System
A	Gapuwiyak Culture & Arts	NT	Gapuwiyak	2008?	Incorporated	Yes	ANKAAA	Artist Management System
A	Injalak Arts	NT	Oenpelli	1989	Incorporated	Yes	ANKAAA	Artist Management System
A	Maningrida Arts & Culture	NT	Maningrida	1990?	Hosted	Yes	ANKAAA	Artist Management System
A	Milingimbi Art & Culture Centre	NT	Milingimbi	2000?	Incorporated	Yes	ANKAAA	Artist Management System
APY	Ernabella Arts	SA	Ernabella/Pukatja	1974	Incorporated	Yes	Desart + Ananguku Arts	Excel data
APY	Iwantja Arts & Crafts	SA	Iwantja/Indulkana	1970s	Incorporated	Yes	Desart + Ananguku Arts	Artist Management System
APY	Kaltjiti Arts & Crafts	SA	Kaltjiti/Fregon	1990?	Incorporated	Yes	Desart + Ananguku Arts	Artist Management System
APY	Mimili Maku Arts	SA	Mimili	2006?	Incorporated	Yes	Desart + Ananguku Arts	Not provided
APY	Ninuku Arts	SA	Kalka and Pipalyatjara	2006?	Incorporated	Yes	Desart + Ananguku Arts	Artist Management System
APY	Tjala Arts	SA	Amata	1997	Incorporated	Yes	Desart + Ananguku Arts	Not provided
APY	Tjungu Palya	SA	Nyapari and Kanpi	2006	Incorporated	Yes	Desart + Ananguku Arts	Not provided
C	Barkly Arts (BRA)	NT	Tennant Creek	1996	Incorporated	Yes	Desart	Not provided
C	Epenarra Artists	NT	Epenarra	?	Hosted (BRA)	No	Desart	Not provided
C	Kulumindini Arts	NT	Elliot	?	Hosted (BRA)	No	Desart	Not provided
C	Djilpin Arts	NT	Beswick and Katherine	2002	Incorporated	Yes	ANKAAA	Artist Management System
C	Durrmu Arts	NT	Peppimenarti	2000	Incorporated (2011)	Yes	ANKAAA	Artist Management System
C	Nyinkka Nyunyu Art & Culture Centre	NT	Tennant Creek	2003	Incorporated	Yes	Desart	Not provided

Art Region	Name of publicly funded art business	State	Community	Start	Status	Website	Peak body	Production Data
C	Merrepen Arts, Culture & Language	NT	Daly River	1986	Incorporated	Yes	ANKAAA	Not provided
C	Mimi Aboriginal Art & Craft	NT	Katherine	1997?	Incorporated	Yes	ANKAAA	Not provided
C	Ngukurr Arts	NT	Ngukurr	2008?	Incorporated	Yes	ANKAAA	Not provided
C	Waralungku Arts	NT	Borroloola	2003	Incorporated	Yes	Desart + ANKAAA	Artist Management System
CD	Hermannsburg Potters	NT	Hermannsburg/ Ntaria	1990	Incorporated	Yes	Desart	Artist Management System
CD	Keringke Arts	NT	Santa Teresa	1988	Incorporated	Yes	Desart	Artist Management System
CD	Ngurratjuta Iltja Ntjarra Art Centre	NT	Alice Springs/ Hermannsburg	2004	Hosted	Yes	Desart	Artist Management System
CD	Mwerre Anthurre Artists (Bindi Inc.)	NT	Alice Springs	2000	Hosted	Yes	Desart	Artist Management System
CD	Tangentyere Artists	NT	Alice Springs	2006?	Hosted	Yes	Desart	Artist Management System
CD	Tapatjatjaka Art & Craft	NT	Titjikala	1999?	Incorporated	Yes	Desart	Excel data
CD	Tjuwanpa Resource Centre	NT	Hermannsburg/ Ntaria	?	Hosted	No	Desart	Excel data
CD	Waltja Tjutangku Palyapayi	NT	Alice Springs	2005?	Hosted	Yes	Desart	Not provided
CD	Yarrenyty Arltere	NT	Alice Springs	2007?	Hosted	No	Desart	Artist Management System
ED	Arlpwe Art & Culture Centre	NT	Alekarenge	2008	Incorporated	Yes	Desart	Artist Management System
ED	Artists of Ampilatwatja	NT	Ampilatwatja	2002	Incorporated	Yes	Desart	Artist Management System
FNQ	Girringun Aboriginal Art Centre	Qld	Girringun (Cardwell)	2005?	Hosted	Yes	IACA	Artist Management System
FNQ	Hope Vale Arts Centre	Qld	Hopevale	1995?	Incorporated	Yes	IACA	Excel data
FNQ	Lockhart River Art Centre	Qld	Lockhart River	1995	Incorporated	Yes	IACA	Artist Management System
FNQ	Mornington Island Arts	Qld	Gununa (Mornington Is.)	1985	Incorporated	Yes	IACA	Excel data
FNQ	Pormpuraaw Art Centre	Qld	Pormpuraaw	2005	Incorporated	Yes	IACA	Excel data
FNQ	Wei'num Arts	Qld	Weipa	2010	Incorporated	Yes	IACA	Not provided
FNQ	Wik & Kugu Arts & Craft Centre	Qld	Aurukun	2000?	Hosted	No	IACA	Excel data
FNQ	Wujal Wujal (Bana Yiriji)	Qld	Wujal Wujal	2009?	Hosted	Yes	IACA	Not provided

Art Region	Name of publicly funded art business	State	Community	Start	Status	Website	Peak body	Production Data
K	Bidyadanga Artists	WA	Bidyadanga	2009?	Project: supported by TAFE	No	Nil	Excel data
K	Mangkaja Arts	WA	Fitzroy Crossing	1993	Incorporated	Yes	ANKAAA	Artist Management System
K	Mowanjum Art & Culture Centre	WA	Mowanjum/Derby	2006	Incorporated	Yes	ANKAAA	Artist Management System
K	Waringarri Aboriginal Arts	WA	Kununurra	1984	Incorporated	Yes	ANKAAA	Artist Management System
K	Kira Kiro	WA	Kalumburu	?	Project: supported by Waringarri	No	ANKAAA	Artist Management System
K	Warmun Art Centre	WA	Warmun	2003	Incorporated	Yes	ANKAAA	Artist Management System
K	Yarliyil Art Centre	WA	Halls Creek	2007	Hosted by Shire	Yes	ANKAAA	Artist Management System
K	Laari Gallery	WA	Yiyili	1972	Hosted by local school	No	ANKAAA	Excel data
OB	Ceduna Arts & Cultural Centre	SA	Ceduna and surrounds	2009?	Hosted	Yes	Ananguku Arts	Excel data
OB	Coober Pedy Artists	SA	Coober Pedy	2001	Project	No	Ananguku Arts	Excel data
OB	Outback Arts	NSW	Walgett, Lightning Ridge, Warren, Coonamble, Bourke	2003?	Project	Yes	Nil	Excel data
OB	Bynoe Arts & Crafts	Qld	Normanton	?	Hosted	Yes	Nil	Not provided
T	Jilamara Arts	NT	Milikapiti	1989	Incorporated	Yes	ANKAAA	Artist Management System
T	Munupi Arts	NT	Pirlangimpi	1990	Incorporated	Yes	ANKAAA	Artist Management System
T	Tiwi Design	NT	Nguiu	1968	Incorporated	Yes	ANKAAA	Excel data
TSI	Badhulgal Kuthinaw Mudh Art Centre	Qld	Badu Island	2008	Incorporated	Yes	IACA	Excel data
TSI	Erub Erwer Meta Art Centre	Qld	Darnley Island	2006?	Incorporated	Yes	IACA	Artist Management System
TSI	Gab Titui Cultural Centre	Qld	Thursday Island	2004	Hosted	Yes	IACA	Excel data
TSI	Ngalmun Lagau Minaral Art Centre	Qld	Kubin and St Pauls	2008	Incorporated	Yes	IACA	Artist Management System
WC	Gwoonwardu Mia	WA	Carnarvon	2009?	Incorporated	Yes	Nil	Excel data

Art Region	Name of publicly funded art business	State	Community	Start	Status	Website	Peak body	Production Data
WC	Laverton Leonora Cross Cultural Centre	WA	Laverton	2002	Incorporated	Yes	Nil	Excel data
WC	Roebourne Art Group	WA	Roebourne	2005	Incorporated	Yes	AACHWA	Artist Management System
WC	Spinifex Hill Artists	WA	South Hedland	2008	Project	Yes	Nil	Excel data
WC	Wirnda Barna Artists	WA	Mt Magnet, Cue, Meekatharra	2009	Incorporated	Yes	AACHWA	Artist Management System
WC	Yamaji Art	WA	Geraldton and Mullewa and Northampton	2000	Incorporated	Yes	AACHWA	Artist Management System
WC	Yinjaa Barni Artists	WA	Roebourne	2007	Incorporated	Yes	Nil	Artist Management System
WD	Ikuntji Artists	NT	Haasts Bluff	1992	Incorporated	Yes	Desart	Artist Management System
WD	Irrunytju Arts/Minyma Kutjarra	WA	Wingellina	2001	Hosted	Yes	Desart	Artist Management System
WD	Kayili Artists	WA	Patjarr	2004	Incorporated	Yes	Desart	Artist Management System
WD	Martumili Artists	WA	Newman + six Martu communities	2006	Hosted by Shire	Yes	Desart + AACHWA	Artist Management System
WD	Maruku Arts & Crafts	NT	Mutitjulu + WD and APY, communities	1984	Incorporated	Yes	Desart	Excel data
WD	Papulankutja Artists	WA	Blackstone	2003	Incorporated	Yes	Desart	Artist Management System
WD	Papunya Tjupi Arts	NT	Papunya	2007	Incorporated	Yes	Desart	Artist Management System
WD	Papunya Tula Artists	NT	Kintore and Kiwirrkurra (HQ in Alice Springs)	1972	Pty Ltd Company	Yes	Desart	Excel data
WD	Spinifex Arts Project	WA	Tjuntjuntjara	1996	Hosted	Yes	Desart + AACHWA	Artist Management System
WD	Tjanpi Desert Weavers	NT	Alice Springs and WD, APY and CD communities	1995	Hosted	Yes	Desart	Artist Management System
WD	Tjarlirli Art	WA	Tjukurla	2006	Incorporated	Yes	Desart	Artist Management System
WD	Tjukurba Art Gallery	WA	Wiluna	2006	Hosted by Shire	Yes	Desart + AACHWA	Artist Management System
WD	Walkatjara Art Uluru	NT	Mutitjulu	?	Hosted	No	Desart	Excel data
WD	Warakurna Artists	WA	Warakurna and Wanarn	2005	Incorporated	Yes	Desart	Artist Management System

Art Region	Name of publicly funded art business	State	Community	Start	Status	Website	Peak body	Production Data
WD	Warburton Arts Project	WA	Warburton	1989	Hosted	Yes	No	Excel data
WD	Warlayirti Artists	WA	Balgo and Billiluna, Mulan	1987	Incorporated	Yes	Desart + ANKAAA	Artist Management System
WD	Warlukurlangu Artists	NT	Yuendumu and Nyirrpi	1985	Incorporated	Yes	Desart	Artist Management System
WD	Warnayaka Art & Culture	NT	Lajamanu	1995?	Incorporated	Yes	Desart	Artist Management System
CLOSED ART CENTRES								
A	Anindilyakwa Arts & Cultural Centre	NT	Alyangula	?	?			Not provided
A	Elcho Island Arts & Crafts	NT	Galiwinku	?	?			Not provided
A	Mardbalk Arts and Crafts	NT	Warruwi (Goulburn Is.)	?	?			Not provided
A	Julalikari Arts	NT	Tennant Creek	?	Hosted			Not provided
C	Jirruwan Artists	WA	Wyndham	1998 >2010	Pty Ltd			Not provided
K	Ngaruwanajirri Artists	NT	Nguiu	?	Reopened			Not provided
T	Watiyawanu Artists	NT	Mt Liebig	1995 > 2010	Incorporated			Not provided
WD	Yaruman Artists	WA	Ringer Soak	2004 > 2010	Incorporated			Artist Management System

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