chapter 5
INDIGENOUS ARTISTS

A BOOM IN INDIGENOUS ART

On 30 June 1997, 40 early Indigenous paintings went under the hammer at a Sotheby's auction in Melbourne and record prices were reached. This caused one Melbourne art collector and dealer to predict that Aboriginal artists would soon be seen as the Van Goghs of Australia with prices to match.[6] The increasing publicity surrounding sales of Aboriginal art, especially by auction houses, made us keen to find a source that provided more than anecdotal evidence of a boom in Indigenous art.

A Sotheby's 'tribal art' sale in Sydney in November 1997 raised $809,574 from 322 sales. The works were mainly Aboriginal art, led by a renewed interest in paintings of Wandjina spirits from the Kimberley region.[7] Provisional data suggest that the boom continued in 1998. Sotheby's reported raising $4.17 million at public auctions for Aboriginal, African and Oceanic art, up from $3.77 million in 1997.[8]

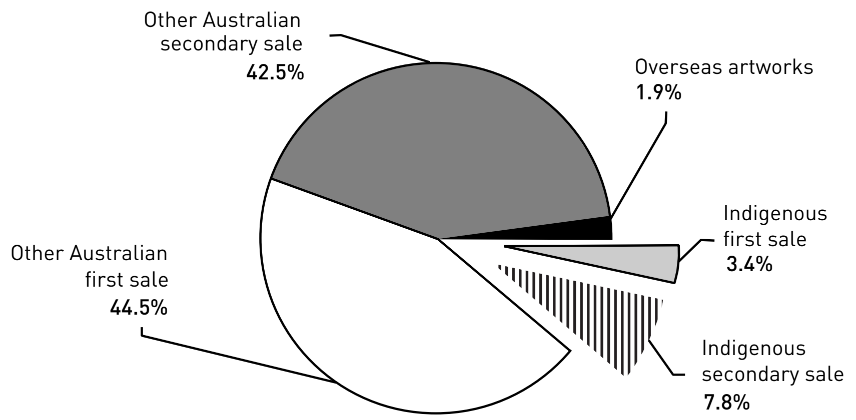
A major data source does indeed exist, as reported later in this chapter. The first two sections below set it in perspective, dealing with commercial galleries and purchases by international visitors, respectively.

SALES BY COMMERCIAL ART GALLERIES

In 1996-97, commercial art galleries sold $14.6 million worth of Aboriginal and Torres Strait Islander artworks. Of the 457 identified galleries, 72 were involved in first sales on commission (totalling $4.4 million) and 57 in secondary sales ($10.2 million). Of the latter, 95% were of artworks bought by the gallery for sale on its own account; only $0.5 million of secondary sales of Indigenous artworks were on commission.

The total value of all artworks sold by commercial galleries in 1996-97 was $130.9 million (see also Chapter 2). These were overwhelmingly Australian works. Indigenous artists accounted for 7% of total *first* sales of Australian works and 15.5% of the corresponding *secondary* sales. The difference suggests that Indigenous artworks appreciate more than mainstream ones when the works are resold. Whether the artists benefit is another matter.

5.1: Sales of artworks by Australian commercial galleries, 1996-97



Source: Australian Bureau of Statistics, *Commercial Art Galleries* 1996-97 (8651.0)

Chart 5.1 shows that Aboriginal and Torres Strait Islander artists represented 11.2% of total commercial gallery sales of artworks in 1996-97 (first sales 3.4% and secondary sales 7.8%). This appears to be a high proportion, given that only 5% of painters and sculptors are Aborigines or Torres Strait Islanders according to the Census. However, it is doubtful if even full-time Indigenous artists always get identified and the Census does not cover those who only work part-time. The findings of the 1996 Census are discussed further towards the end of this chapter.

These new figures for commercial art galleries from the Australian Bureau of Statistics are valuable, and it is an important innovation that Indigenous art was identified separately in the ABS survey. However, the galleries identified by the ABS do not embody the total market for Indigenous art. There is a wide range of outlets from souvenir shops to department stores that sell these artworks. These were naturally not included since the primary aim was to develop statistics for commercial art galleries rather than for particular types of art.

The 457 galleries had a total net *income* of $87.3 million (sales less expenses). Art sales on commission or own account accounted for the vast majority ($75.2 million), sales of craft works for $4.2 million and other retail sales for only $1.7 million. The remaining income came from government funding, interest and other earnings. Few other outlets could boast such a high proportion of art-related sales.

Being a first survey, there are no readily available statistics to show growth as well as size. The other sources reported in this chapter will help to fill this gap.

INTERNATIONAL VISITORS AND ABORIGINAL ARTS AND SOUVENIRS

The Australia Council commissioned three surveys of international visitors' purchases in 1990, 1993 and 1996, respectively. The surveys formed a special part of the Bureau of Tourism Research International Visitor Survey carried out regularly at eight international airports in Australia. The samples were adequate rather than large (about 2,000 valid responses in 1993 and 2,590 in 1996), so care is needed in interpreting findings about particular groups. The estimated proportion of visitors purchasing Aboriginal art or souvenirs (30% in 1990, 37% in 1993 and 31% in 1996) is subject to sampling error.

Converted to constant 1997 prices, there was an implied 13% annual increase in total purchases of Aboriginal art and souvenirs between 1990 and 1993 followed by 10% between 1993 and 1996 (Chart 5.2).

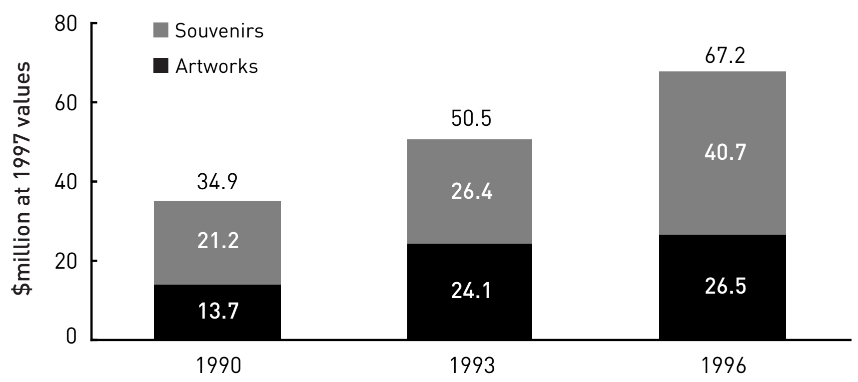
The 1993 and 1996 surveys showed the proportion of visitors who spent up to $10, between $11 and $50, etc. on 'art' and 'souvenirs' separately. Most of the estimated increase between 1993 and 1996 was in 'souvenirs' rather than 'art' (the estimated annual increase in the latter was 3.2%). This may be due to statistical sampling error as well as the difficulty of distinguishing between 'art' and 'souvenirs', as explained below.

The 1990 survey only asked how much each international visitor had spent on art and souvenirs combined. However, it is possible to infer separate distributions by referring to the results of the two later surveys. The proportion of purchasers of Aboriginal artefacts who nominated souvenirs was lower in 1993 than in 1996, while the proportion doing so was similar in 1990 and 1996. This does suggest that the 1993 results were an aberration due to sampling error. Looking at the full period between the 1990 and 1996, sales of Aboriginal 'art' appear to have increased at about the same rate as 'souvenirs' with Aboriginal designs — about 11.5% per annum.

The average purchase per visitor of either art or souvenirs or both according to these estimates was $50 in 1990, $49 in 1993 and $60 in 1996 (converted to 1997 dollars). 'Art' is clearly more expensive than 'souvenirs' according to the 1993 and 1996 surveys, and again 1993 appears to be out of step with the two other years.

There is also reason to focus on the definitions. Artworks were defined in the visitor survey to include paintings, carvings and sculpture, craft, books on

5.2: Estimated purchases of Aboriginal art and souvenirs by international visitors



Source: Jane Spring, *International Visitors and Aboriginal Arts, 1996, 1993 and 1990*, Australia Council *Research Papers No 16*, February 1998, *No 10*, July 1993 and *No 4*, June 1990

Aboriginal art, and recordings of Aboriginal music. Aboriginal carvings in the survey questionnaire were explained as 'carved and decorated wood items', and craft as 'baskets, wooden bowls, hand-printed fabric, beads, pottery, headbands etc'. Souvenirs were 'T-shirts, boomerangs, greeting cards, place mats, etc'. It is very doubtful that these definitions fully distinguish 'art' from 'souvenirs' in respondents' minds (quite apart from the language problems inherent in international visitor surveys).

Concentrating on the 'art' component, we can compare sales to international visitors in 1996 (an estimated $26.5 million) with sales of Aboriginal art by commercial galleries in 1996-97, which totalled $14.6 million according to the previous section. While this comparison may support the assertion that many artworks are sold from other outlets, the two concepts of 'art' are actually quite different.

There is reason to believe from both physical observation and the related data on auction sales in the next section that paintings account for the bulk of Indigenous art sold by commercial galleries, say, 95% or more. According to the 1996 international visitor survey, 26,000 bought Aboriginal paintings, 51,000 carvings and sculpture, 29,000 craft, 12,000 books on Aboriginal art and 15,000 recordings of Aboriginal music. In total, 103,000, or 10% of total visitors, purchased one or more of these categories.

Assuming that the average value per item bought was the same, the implication is that paintings made up 20% of the value, or about $5 million in 1996 (the corresponding proportion in the two previous surveys was 16%). It may be argued that the average value per painting exceeds the average value of the other categories, which would increase the total value. Nevertheless, it brings the two sets of data into better perspective, given that the international visitor market is likely to be a significant component of the total.

The above findings were based on calculations shown in Tables A3.3 in Appendix 3, dealing with each of the visitor surveys in turn. Please refer to the notes accompanying the table to form a personal assessment of the reliability of the assumptions made.[9]

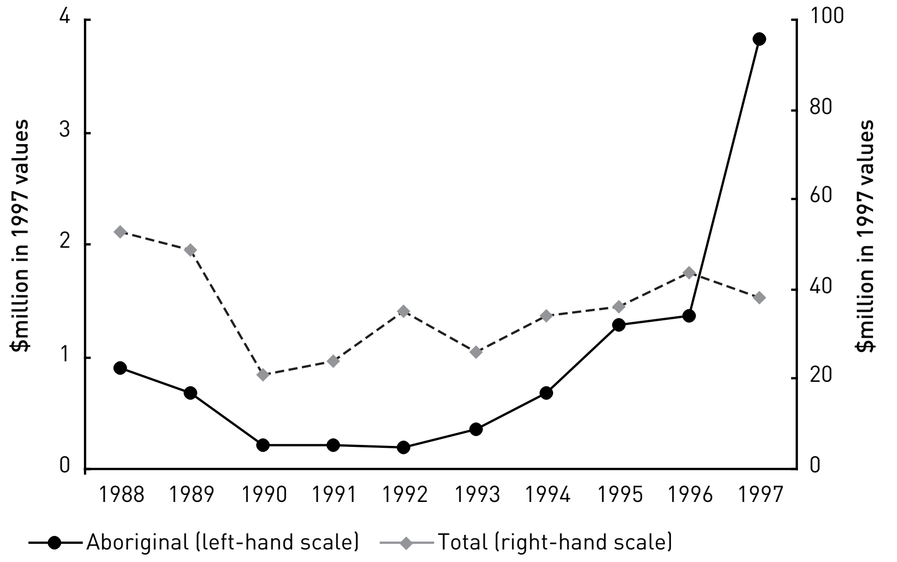
AUSTRALIAN AUCTION SALES OF ABORIGINAL ART

The *Australian Art Sales Digest*, compiled annually by John Furphy of Acorn Antiques in Melbourne, lists all works offered for sale produced by artists who have lived or worked in Australia. It covers 20 auction houses existing for part or all of the period from January 1988 to December 1997 (the 1998 edition was published after this analysis was completed). The list is available both in book form (including some summary statistics) and on the Internet, from which we downloaded a virtually complete listing of Aboriginal artworks actually sold. We used the printed publication to check the total figures we had obtained for each year, and our results are compatible.

Both Aboriginal and mainstream Australian artworks showed a decline in sales between 1988 and 1990, and Aboriginal sales remained in the doldrums for two more years. There are two main reasons for this:

- The total art market was reported to suffer badly in the recession of the early 1990s, compared with the buoyant business climate of the 1980s when various speculators helped to build up a boom mentality. Chart 5.3 shows just how severe the decline was in the art auction market. While a total of $51.7 million was sold in 1988 and $47.4 million in 1989, the figure crashed to only $19.5 million in 1990. Table A3.4 shows the overall figures from the *Australian Art Sales Digest*, after conversion to 1997 values.

5.3: Aboriginal art compared with total auction sales



Source: *Australian Art Sales Digest*

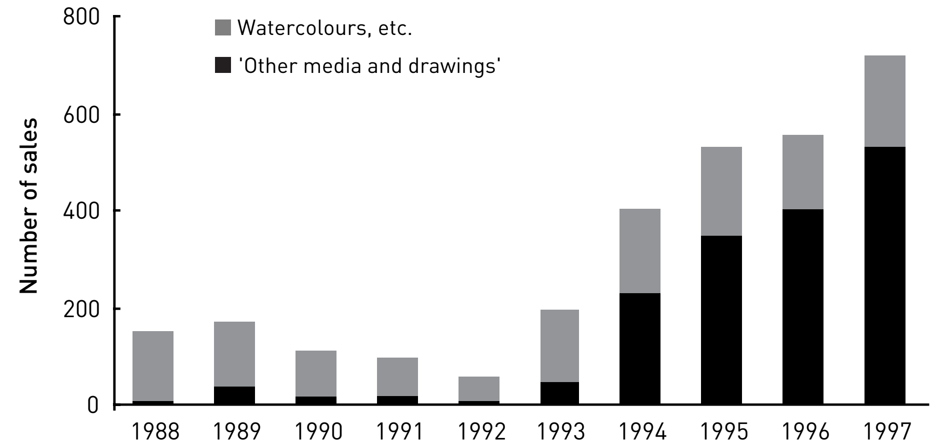
- There has been a radical change in the nature of the Aboriginal art market, from the 'Namatjira era' of watercolours to the employment of other styles dominated by synthetic polymer paints on board or canvas. During this transition, auction sales of Aboriginal art declined even more strongly than the total auction market, from $900,000 in 1988 and $700,000 in 1989 to only $200,000 in 1990 (Table A3.4).

Between 1994 and 1997, there was an explosion in auction sales of Aboriginal art (1998 appears to have been another top year). While the recovery in total art auction sales between 1990 and 1997 was along a highly respectable annual trend rate of 10%, Aboriginal art auction sales in 1997 were 22 times higher than when these sales bottomed in 1992. Between 1996 and 1997 alone, Aboriginal art auction sales almost tripled from $1.4 million to $3.8 million.

Appendix 3 contains a number of background tables on the subject. Table A3.4 shows that Aboriginal art increased from 0.5% of the total value of auction sales in 1992 to 10.3% only five years later.

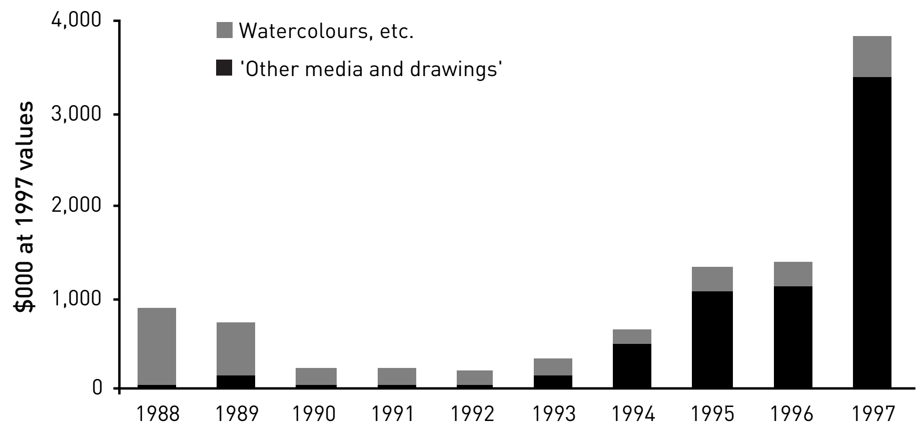
The change in the nature of Aboriginal art sold at auction is dramatic. Year by year, watercolours have lost share to 'other media and drawings', which for Aboriginal arts means mainly acrylic paints (the category covers many other media employed by mainstream Australian artists, such as charcoal, crayon, gouache, pastel, tempera and wash). Chart 5.4 shows the distribution in terms of numbers of works sold, and Chart 5.5 the even more dramatic development in total value, because average values increased to a remarkable extent between 1994 and 1997, as shown by Table A3.5.

5.4: Annual number of auction sales of Aboriginal art



Source: *Australian Art Sales Digest*

5.5: Total value of auction sales of Aboriginal art



Source: *Australian Art Sales Digest*

Other categories such as oil paintings, prints and graphics, ceramics and sculptures are sold through auction, but compared with total Aboriginal art sales they are minor. Even in 1997, the proportion of ceramics and sculpture did not exceed 5% of total auction sales, despite a major sale that year by Sotheby's in Sydney featuring the art of Enraeld Djulabinyanna (1885-1970), Cardo Kerinauia (1900-60) and others. The ratio is usually much lower. See Table A3.5 for detail.

This is relevant in relation to the survey of international visitor purchases of Aboriginal arts and souvenirs reported in the previous section. Aboriginal art sales at auctions, and almost certainly by commercial galleries, are absolutely dominated by paintings.

Appendix 3 contains further background, which may be summarised as follows:

- The total number of auction sales of Aboriginal artworks increased from only 53 in 1992 to 716 in 1997, and the corresponding total values from $176,000 to $3.8 million expressed in 1997 prices. At the same time the maximum value of an individual sale increased from about $21,000 in 1992 to over $200,000 in 1997 (Tables A3.6 and A3.8).
- Over the past decade as a whole, four auction houses accounted for 85% of the almost 3,000 sales of Aboriginal artworks and 95% of their value of almost $10 million in 1997 dollars (Table A3.7). Sotheby's accounted for 36% of sales, but its market share of total sales was 66% because average values were relatively high.
- Christie's had a much smaller share of Aboriginal works sold (5%), but like Sotheby's these sales averaged about $6,000, boosting the share of total value to 10%. Melbourne-based Leonard Joel and Sydney-based Lawson's tend to sell smaller works: their shares of the total number of sales were 23% and 20%, respectively, but their combined share of the total value was only 20%.
- Melbourne is the outstanding location for Aboriginal art auctions with 76% of the total value of sales, followed by Sydney with 22%. This leaves just over 2% for Brisbane, Adelaide, Perth and overseas locations (Auckland and London) according to Table A3.7.

Who are the outstanding Aboriginal artists in terms of sales value? Table A3.8 shows the top artist for each year. For the first six years it was Albert Namatjira, who died in 1959 and specialised in watercolours, with ghost gums a favourite topic. Between 1994 and 1997, synthetic paints took over, and the top sale value increased from less than $20,000 to $206,000.

Nowhere is the 1997 boom better expressed than in the 25 top values of the past decade (Table A3.9). Even after adjusting past sale values by expressing them in 1997 dollars, 18 of the top 25 were sold in 1997. Only two Namatjiras on the list, sold in 1988, had been sold before 1995. That year saw the first three Aboriginal artworks selling at more than $100,000: Johnny Warrangula Tjupurrula's *Water Dreaming at Kalipinypa* (1972) at $206,000 and two works by Shorty Lungkarda Tjungurrayi going for $123,500 and $103,700, respectively.

A glance at Table A3.9 reveals a remarkable concentration on top-priced paintings completed in the 1970s, especially 1972. The main exception is Emily Kame Kngwarreye (1910-96), whose most valuable works date from the early 1990s (according to the *Australian Art Sales Digest*, all her works sold date from 1989 or later, despite her venerable age).

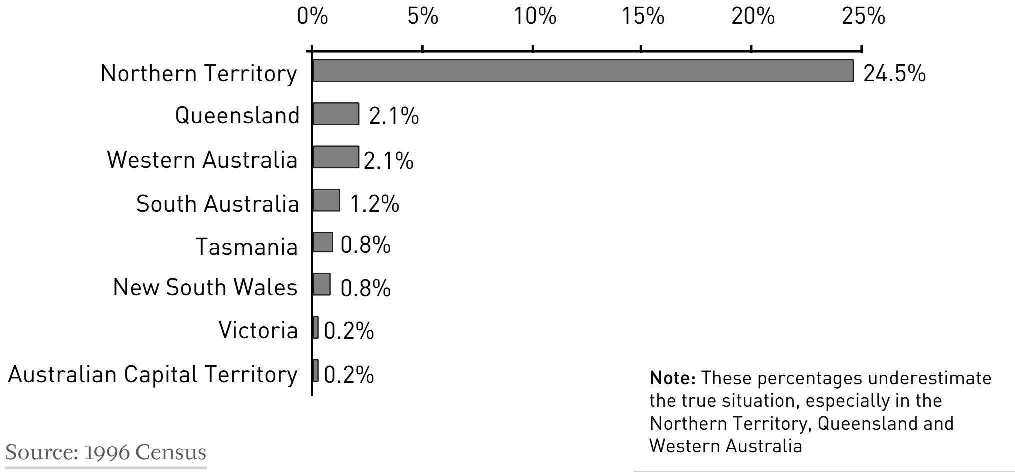
CENSUS UNDERSTATES NUMBER OF INDIGENOUS ARTISTS

There were 910 Indigenous full-time arts professionals according to the 1996 Census. Tables A3.1 and A3.2 (Appendix 3) suggest that there were about equal numbers (250) in Queensland and New South Wales, 160 in the Northern Territory, 130 in Western Australia and 60 in South Australia. This underestimates the true number, because of the difficulty of obtaining meaningful data.

The largest group according to the 1996 Census was visual arts including crafts, totalling 380 or 42% of all arts professionals. Of these, over 100 were in the Northern Territory. These numbers represent only those artists who work full-time and get properly recorded through the Census process. Since this is particularly difficult in remote regions, the extent of the understatement is likely to be highest in the Northern Territory, followed by Western Australia and Queensland.

Despite this, Indigenous artists were far more prevalent in the Northern Territory than anywhere else: almost one-quarter in 1996 according to the official Census figures (Chart 5.6). The pattern is even more striking for visual artists in the Northern Territory: three-quarters of painters and sculptors counted in the Census were Indigenous in 1996, as well as half the craft practitioners (Table A3.2).

5.6: Proportion of Indigenous arts professionals in each State and Territory



Source: 1996 Census

INDIGENOUS ORGANISATIONS

The Australia Council's publication on the occasion of its 25th anniversary (*Artburst!*) presented an analysis of various types of arts-related organisations, showing how these had proliferated over the previous quarter century. This information was based on successive volumes of *Ozarts* produced by the Australia Council. These volumes included the vital information about year of establishment which was needed to determine the gross increase in the number of these organisations. *Ozarts* has been discontinued, which is regrettable since it provided a reliable source of information on growth in the number of organisations.

There was an apparent increase in the number of Aboriginal organisations from two in 1971 to 11 in 1981 and an estimated 37 in 1991. According to *Artburst!* a feature of this growth was a broadening of organised Aboriginal cultural activities into theatre, dance and contemporary music. The largest group, however, was devoted to art and craft: 46% of the organisations listed in *Ozarts* 1991.

The *Yellow Pages* for 1987 listed 33 establishments under 'Aboriginal arts and crafts' in seven capital cities, plus the Northern Territory. By 1997, this number had increased to 151. This increase occurred across the continent: in Sydney from 11 to 27, in Melbourne from one to 17, in Brisbane from three to 22, in Adelaide from three to 18, in Perth from two to 10, in Hobart from none to one, in Canberra from none to six, and in the Northern Territory from 13 to 50.