

Planning for the Future

Statistical Profile:
Aboriginal and Torres Strait Islander Arts

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The aim of the Australia Council's *Planning for the Future* project is to identify trends, issues and opportunities in order to develop long-term strategies to help nurture the vitality and sustainability of the arts in Australia. Several processes will be used to bring this information together. One of these is the Vision Days. Another is the collation and analysis, by art form, of recent research and statistical data from a diversity of sources. Much of the data are from the Australian Bureau of Statistics or the Council's own research but many other reports have also been tapped.

This is the first time that data have been compiled by art form in such a systematic way. The statistical profiles comprise data on, for example, employment, organisations, products, household expenditure, attendances, participation, educational enrolments, corporate support and funding. We anticipate this information will be of value not just to the Council and its Funds but to anyone else in government and the arts sector generally with an interest in strategic planning.

The key trends or information sources are summarised in dot point form at the beginning. Full details are then provided in the report and a full bibliography is provided at the end.

We would welcome your feedback about the content or style of the report.

Sarah Gardner
Director Strategic Initiatives

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- The auction house 'boom' was largely due to an increase in the number of 'other media' works sold through auction...
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Funding of Aboriginal and Torres Strait Islander arts

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References

Introduction

The statistical analysis of Aboriginal and Torres Strait Islander (A&TSI) arts is particularly difficult: data is notoriously scarce and the usual industry frameworks can obscure complexities and subtleties in the production, dissemination and realisation of indigenous art in Australia. For example, organising data according to an Aboriginal and Torres Strait Islander arts industry ‘value chain’, as proposed in ATSIC (1995; 11), sets the A&TSI arts as a separate industry or sector. But data organised in this manner may fail to signal significant broader trends in A&TSI artistic development. For example, data may fail to reflect changes in the ‘aboriginality’ of the arts industries as a whole, the level of diffusion of indigenous art and ideas, the extent of indigenous and non-indigenous artistic fusion, or the extent of bicultural dialogue across the arts sector and across Australian society.

The analysis here departs from the value chain format used in other chapters, and is instead organised around available data sources. The chapter presents limited analyses on:

- A&TSI ethnicity in arts/cultural employment
- community art and craft centres in remote Australia
- the number of A&TSI arts organisations
- financial data on selected A&TSI arts centres
- Australians’ expenditure on A&TSI art and crafts
- tourist expenditure and participation in A&TSI arts
- auction sales of A&TSI artworks
- sales of A&TSI artworks through commercial galleries
- funding of A&TSI arts

The data presented here provides some indication of a growth in Aboriginal and Torres Strait Islander arts. But the data is severely limited in its application to strategic issues. Not only is there a paucity of reliable data, but the data that does exist are not sophisticated enough to reflect the complexity of Australia’s A&TSI arts industry. For example, data presented here indicates that a ‘boom’ has occurred in the sale of A&TSI artworks through Australia’s auction houses. The boom is measured both as an increase in the volume of sales and an increase in the average price of sales. The data do not, however, indicate whether or not this ‘boom’ is enjoyed by Australia’s Aboriginal and Torres Strait Islander artists.

This is a simple example of a number of broader and more complex cultural, ethical and legal issues that, although crucial to any analysis of the A&TSI arts industry, cannot be addressed here.

Aboriginal and Torres Strait Islander employment in culture

This section presents a limited analysis of Aboriginal and Torres Strait Islanders who are employed in art and culture. The data are derived largely from the Australian Bureau of Statistics' census.

It should be noted that *ethnicity* data may be a poor indicator of *cultural* trends in Aboriginal and Torres Strait Islander arts. People who identify themselves as Aboriginal and Torres Strait Islanders (or 'indigenous') may not be involved in creating A&TSI art; alternatively, people who do *not* identify themselves as Aboriginal and Torres Strait Islanders may be involved in creating A&TSI art. Furthermore, ethnicity data does not reflect the level of diffusion of indigenous *ideas* through the arts and cultural sector. For example, art that represents a fusion between indigenous and non-indigenous art, or 'western' art that draws on aboriginal artistic ideas, cannot be identified from existing collections.

It is also well-accepted that the census significantly underestimates the population of cultural workers. Census employment data is for primary job only, defined as the job from which a person receives the largest part of their income. People in voluntarily or 'secondary' employment in culture are not counted as cultural workers in the census. For example, census data suggests that 1,423 Aboriginal and Torres Strait Islanders were employed in *all* culture/leisure occupations in 1996¹. Yet data presented later in this profile indicates that in 1995-96 just nineteen art centres serviced around 3,300 indigenous *visual* artists alone².

Although census data does not provide an accurate indication of the number of indigenous artists at any point in time, it can provide interesting insights into trends in Aboriginal and Torres Strait Islander employment in the industry. Unfortunately, however, there is no published data on census trends in indigenous artists' employment.

In 1996, visual arts, craft and design artists made up one-third of employed Aboriginal and Torres Strait Islander artists as measured by the census

Figure A.1 indicates that in 1996, visual artists accounted for nearly one-quarter of all Aboriginal and Torres Strait Islanders employed in cultural occupations. If the broader photography and design occupations are included, the proportion rises to 34 percent. In other words, just over one-third of employed Aboriginal and Torres Strait Islander artists were in visual arts, craft and design occupations in 1996.

¹ This figure is derived in the usual way by adding together Aboriginal people employed in cultural occupations and Aboriginal people employed in the culture/leisure industries in non-cultural occupations.

² See also Altman (1999).

Figure A.1: Indigenous people employed in selected cultural occupations, 1996

Cultural occupations	Number	Percent of cultural occupations
Visual arts and crafts nec		14
Painter		10
Park ranger		10
Radio presenter		6
Artists/related professional nfd		5
Library assistant		5
Dancer/choreographer		4
Other		45
Total cultural occupations	1,423	100
Non-cultural occupations, cultural industries	780	
Total culture	2,203	2
Total A&TSI employment	80,153	100

Source: ABS Employment in selected culture/leisure occupations

Dance/choreography and visual arts occupations have the highest rates of Aboriginal and Torres Strait Islander employment among cultural occupations

Figure A.2 shows the representation of Aboriginal and Torres Strait Islanders in selected cultural occupations in 1996. Dancers and choreographers had the highest representation, with 6.1 percent of dancers and choreographers identifying themselves as indigenous. It should be noted that in some cases, calculations are based on small numbers of people and are therefore sensitive to the privacy randomisation procedures adopted by the ABS.

Figure A.2: Indigenous people employed in selected cultural occupations, 1996

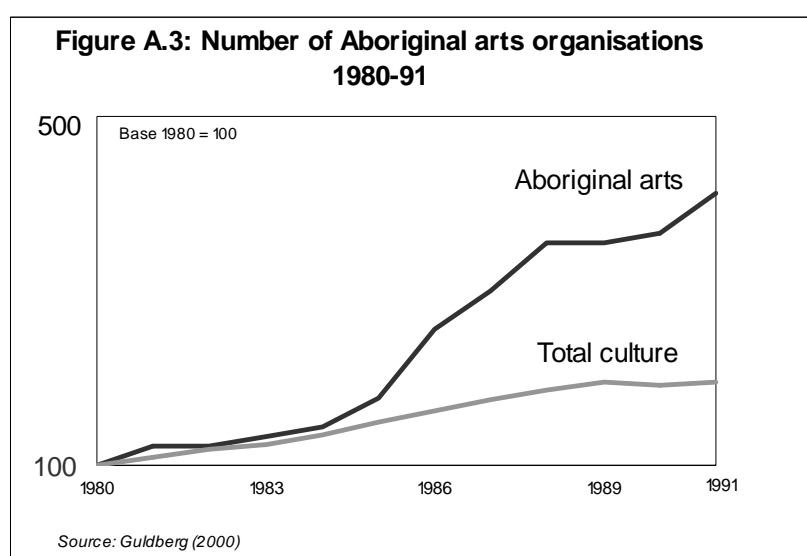
Cultural occupation	Percent of occupation who identified as 'indigenous'
Dancers and choreographers	6.1
Painters and sculptors	5.1
Media presenters	3.9
Potters and other crafts	3.5
Artists and related professions undefined	2.2
Actors	1.4
<i>average for total employment = 1.0</i>	
Film, TV, radio and stage directors	0.7
Authors and related professions	0.6
Musicians and related professions	0.6
Journalists and related professions	0.5
Private art teachers (all genres)	0.4
Designers and illustrators	0.3
Total cultural occupations	0.9
Total employment	1.0

Source: Guldberg (2000)/ABS Employment in selected culture/leisure occupations

Organisations

From 1980 to 1991 the number of Aboriginal arts organisations grew faster than the number of cultural organisations

Guldberg's survey of organisations in Artburst! indicates that the number of organisations related to 'Aboriginal arts' increased faster than all cultural organisations from 1980 to 1991 (figure A.3). Aboriginal arts organisations increased from 2 percent to 4.1 percent of all cultural organisations.



Financial data on selected Aboriginal and Torres Strait Islander arts centres

As part of its Art and Craft Centre Story project, ATSIC (2000) commissioned a survey of 39 A&TSI arts centres. Data were gathered from the centre's audited accounts for the three years 1995-96 to 1997-98. The centres for which data is presented here (19 centres) serviced a constant population of 3,316 artists for each of the three years.

Figure A.4 indicates that between 1995-96 and 1997-98, arts centre revenue from the sale of artworks increased, payments to artists increased and ATSIC funding declined. Artists received around 60 percent of artwork sales. The data should be interpreted with caution: the sample size is small and not necessarily representative and there is substantial variability in financial structure across centres.

Figure A.4: Financial data for nineteen indigenous arts centres 1995-96 to 1997-98

	\$m			Percent change 1995-96 to 1997-98
	1995-96	1996-97	1997-98	
ATSIC funding	2.3	1.7	1.8	-22
Artwork sales	4.8	5.1	5.9	23
Payments to artists	3.0	2.9	3.5	17
Indicators				
<i>Payment to artists as percent of sales</i>	63	57	59	
Subsidy per artist (\$)	694	513	543	
<i>Subsidy as percent of sales</i>	48	33	31	

Source: ATSIC (2000)

Comparisons with 1987-88 data (gathered in an earlier study) are possible for 10 of the arts centres. Figure A.5 summarises. Data shows a general reduction in 'performance' between 1987-88 and 1996-97: the level of sales per subsidy was lower in 1996-97, the payments to artists per subsidy was lower and the number of artists serviced per \$1,000 of subsidy was lower. The proportion of sales fed through to artists remained relatively stable. This reduction in performance is, however, more likely due to unusually high levels in 1987-88, which even at the time were considered 'unsustainable' ATSIC (2000; 91).

Figure A.5: Financial ratios for ten indigenous arts centres 1987-88 and 1997-98

	1987-88	1996-97
Sales/operational subsidy	4.4	3.8
Payments to artists/operational subsidy	3.3	2.4
Artists serviced per \$1,000 subsidy	3.6	2.3
<i>Payment to artists as percent of sales</i>	74	75

Source: ATSIC (2000)

Australians' expenditure on Aboriginal and Torres Strait Islander art and craft items

Australian households spent an estimated \$70.8 million on indigenous art and craft items in 1997

The ABS' 1997 survey of art and craft purchases gathered limited data on indigenous art and craft purchases by Australian households. Respondents were asked to provide information on their purchases of hand-made art and craft items in the three months prior to questioning. Figure A.6 shows the data annualised by multiplying the three-month data by four. Australians spent an estimated total of \$70.8 million on indigenous arts and crafts in 1997, or 4 percent of all art and craft purchases. Although the combined average price was similar to other art and craft items, the survey indicated

that indigenous crafts were cheaper on average (\$84 compared to \$107 for all crafts).

Figure A.6: Expenditure on indigenous art and craft 1997

	Total annualised expenditure \$m	Mean price \$
Indigenous art items	40.8	186
Indigenous craft items	30.0	84
Total indigenous	70.8	123
All art and craft items	1,821.6	124
<i>Indigenous as percent of total</i>	<i>4</i>	

Source: ABS Art and Craft Purchases 1997

Tourist participation and spending on Aboriginal and Torres Strait Islander arts and souvenirs

There is now a wealth of detailed trend data available on tourist purchases of Aboriginal and Torres Strait Islander art. Tourist expenditure is a significant part of the total A&TSI art market: it is estimated that tourists account for more than half of the total sales value of A&TSI art and souvenirs (ATSIC, 1994; 73). One of the unavoidable problems of the data is in delineating between genuine A&TSI arts products and souvenirs that merely carry indigenous designs, such as T-shirts and ornamental boomerangs, which may not be considered A&TSI art, or may not be manufactured and traded in a culturally appropriate context. The souvenir market has been estimated to make up 90 percent of the sales value of A&TSI cultural products (ATSIC, 1994; 73).

In 1996 international visitors spent an estimated \$67 million on A&TSI arts and souvenirs, a real increase on 1990

Figure A.7 indicates that the value of sales of A&TSI arts to international visitors increased significantly in real terms from 1990 to 1996 (estimation procedure explained in Guldborg, 2000; 55). This increase in sales is attributable mainly to an increase in the number of international visitors over the period, from 2.8m people in 1990 to 4.2m people in 1996³: as figure A.7 shows, the average real expenditure per visitor remained relatively stable at around \$10.

³ Visitor numbers from ABS Yearbook Australia (1998; 586). Figures differ to those used in Australia Council, which are unsourced.

From 1990 to 1996 the number of international visitors increased, but the proportion expressing interest in and participating in A&TSI arts declined
The increase in tourist numbers appears to have been in people less interested in A&TSI arts. Between 1990 and 1996:

- the proportion of international visitors expressing some interest in remained relatively stable, although those expressing that they are very interested declined from 23 percent to 14 percent of visitors;
- there was a decline in the proportion of international visitors visiting an art gallery or museum especially to see Aboriginal art, or visiting a shop that specialises in Aboriginal art (from 18 to 12 percent); and
- the proportion of international visitors purchasing Aboriginal arts declined from 30 to 10 percent, although the proportion buying souvenirs with Aboriginal designs increased slightly from 24 to 26 percent.

The profile and availability of A&TSI arts and souvenirs among international visitors increased 1990 to 1996

Figure A.7 also indicates that the profile of A&TSI arts was more comprehensive in 1996 than in 1990, with the proportion of visitors who had not seen any A&TSI arts declining from 8 to 5 percent of visitors and the proportion citing problems of information and search as the reason for non-purchase declining from 3 to zero percent of visitors. Expense does not appear to be an important reason for non-purchase.

Figure A.7: Selected trends in participation and purchasing patterns of international visitors 1990-96

	1990	1993	1996
Annual value of purchases (\$m, 1996-97 prices)*	34.9	50.5	67.2
Artworks	13.7	24.1	26.5
Souvenirs	21.2	26.4	40.7
Real expenditure per visitor (\$)¹	10	9	10
<i>Level of interest in Aboriginal arts and culture (% of respondents)</i>			
Very interested	23	17	14
Not interested	40	41	41
<i>Participation (% of respondents)</i>			
Visit an art gallery or museum especially to see Aboriginal art	18	16	12
Go to a performance of Aboriginal theatre, music or dance	7	7	9
Visit a shop which specialised in Aboriginal art or craft	n/a	24	19
<i>Purchased (% of respondents)</i>			
Aboriginal arts (paintings, carvings, craft, books, music, etc.)	30	15	10
Souvenirs with Aboriginal designs	24	28	26
<i>Reasons for not buying Aboriginal arts or souvenirs (% of respondents)</i>			
Not interested	41	38	40
Did not think of it	15	16	19
Did not see any	8	3	5
Too expensive	5	4	4
Information/search problems	3	1	0

* Deflated data taken from Guldberg (pending)

¹ Data on visitor numbers from ABS Yearbook

Source: Australia Council, 1990, 1993 and 1996

Sales of Aboriginal and Torres Strait Islander Artworks through commercial galleries

The ABS' commercial art galleries survey provides some information on the sale of A&TSI artworks through 457 commercial galleries around Australia. All data is for 1996-97.

A&TSI artworks make up 11 percent of commercial gallery sales

Total sales of artworks for the 457 galleries was \$130.9m, 11.2 percent of which were A&TSI artworks (or \$14.6m).

A&TSI artworks are less likely to be sold on commission

Just over a third (34 percent) of A&TSI artworks were sold on commission compared to nearly two-thirds (65 percent) of artworks by other Australians.

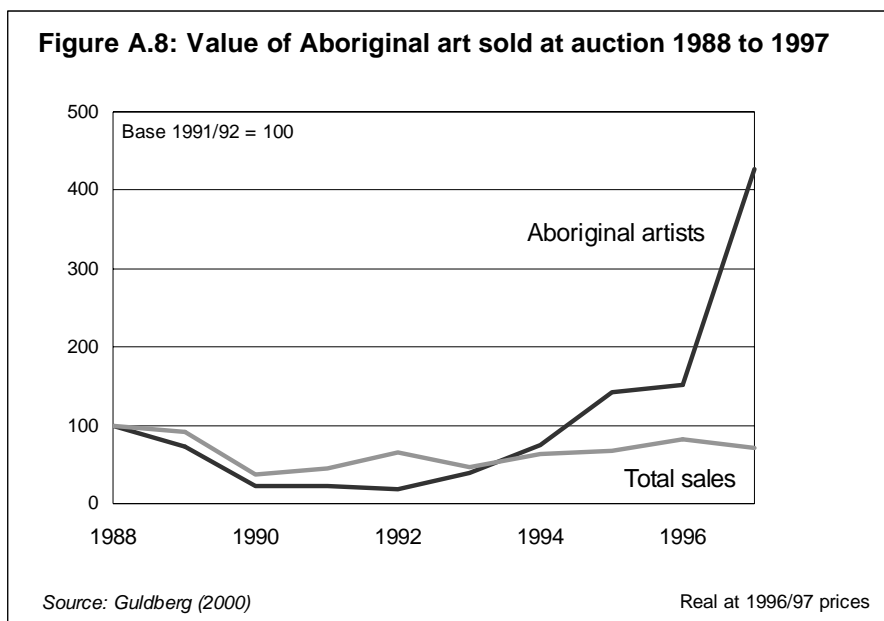
A&TSI artworks are more likely to be 'secondary' sales

70 percent of A&TSI artworks sold were 'secondary' sales compared to nearly half (49 percent) for other Australian artworks.

Sales of Aboriginal and Torres Strait Islander Artworks through auction

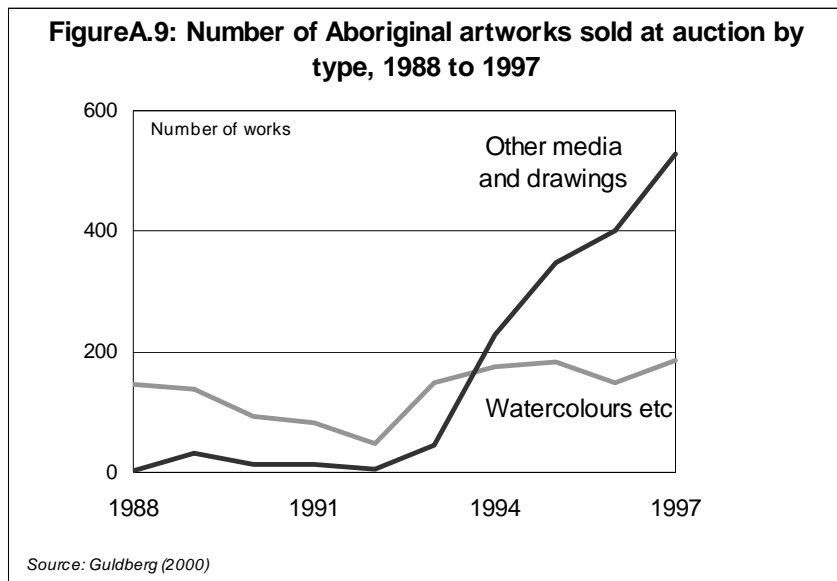
A 'boom' in sales of A&TSI artworks through auction houses occurred between 1992 and 1997

Guldberg (2000) calculates the real value of A&TSI sold at auction to have more than tripled in the decade to 1997 (from \$895,000 in 1988 to \$3.8 million in 1997). Figure A.8 indicates that the growth occurred after 1992 and was particularly pronounced from 1996 to 1997.



The auction house 'boom' was largely due to an increase in the number of 'other media' works sold through auction...

The growth in sales value appears to have been driven largely by an increase in the category 'other media and drawings', mainly acrylic works, which, since 1992, have had a higher average value than watercolours and increased in number from 2 percent to 74 percent of A&TSI auctioned artworks between 1992 and 1997. Figure A.9 sets out the number of artworks sold through auction by type of work.



...and a tripling of the average price of 'other media' works between 1996 and 1997

Guldberg's analysis indicates that the average price of other media works by Aboriginal and Torres Strait Islanders increased from \$2,779 to \$6,362 between 1996 and 1997. Data indicates that the distribution of sales prices of all A&TSI artworks shifted progressively toward higher price brackets between 1992 and 1997.

Funding of Aboriginal and Torres Strait Islander arts

Comprehensive and reliable trend data on the funding of A&TSI arts is not available. ATSIIC (1994) sets out the problems in detail. That publication estimates total funding of A&TSI arts at \$30.9m in 1993-94, as indicated in figure A.10. The ABS puts total culture/leisure funding in 1993-94 at \$2.26 billion, which implies that A&TSI funding made up approximately 1.4 percent of all culture/leisure funding in 1993-94.

Figure A.10: Estimate of A&TSI arts and cultural expenditure 1993-94

Agency	\$m 1993/94
ATSIC	22.6
Australia Council for the Arts	6.2
State/territory	<i>n/a</i>
Arts Ministries (state and territory)	2.1
Total	30.9

Source: ATSIC (1994; 65)

Figure A.11 summarises allocations by the Australia Council to Aboriginal and Torres Strait Islander Arts Funds/Boards for three years from 1989 to 1999. Allocations to A&TSI arts increased over the period from 6 to 7 percent of total Council grant disbursements. The data does not reflect the total allocation to A&TSI arts, as projects with an Aboriginal and Torres Strait Islander focus would also have been funded through the other fund categories.

Figure A.11: Australia Council funding to A&TSI arts funds/boards 1988-89 to 1998-99

	\$m		
	1988-89	1994-95	1998-99
Aboriginal and Torres Strait Islander Arts Fund/Board	2.9	3.8	4.2
Total	49.6	53.1	60.9
<i>A&TSI arts as percent of total</i>	<i>5.8</i>	<i>7.2</i>	<i>6.8</i>

Source: Australia Council annual reports

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