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TITLE

The economy of place - a place in the economy: A value chain study of the remote Aboriginal and Torres Strait Islander arts sector

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ABSTRACT

Australia continues to have a complex and unresolved relationship with its first peoples. Contrasting the often-fraught social and political relations between Aboriginal and settler Australians is the success of the Aboriginal art movement. The cultural and creative expression of Aboriginal people is now central to Australian identity and has produced a unique, globally recognized art movement. In particular, Aboriginal painting has evolved into a significant part of the Australian art market, with collectors in Australia, North America and Europe.

The supply chain linking artists, agents and audiences is a complex and unconventional one. Most Aboriginal artists live in very remote locations, in marginalised communities with art making as almost the only independent form of economic activity. Acting as intermediaries are community-owned art centres that are part art school, part art business, part cultural centre. Art from these remote regions supplies the big-city galleries and auction houses and sustains a nationally important art market, while government agencies subsidise art production, often as a means of addressing poverty and disadvantage.

Despite the prominent place in Australia's creative landscape, there is little information about the scope and scale of the sector and accurate analysis of national trends, successes and challenges is largely absent. Assumptions and anecdote inform discussions of the sector which are complicated by a deeply cross-cultural setting.

This paper presents key findings from a recently completed six-year co-designed and collaborative research project into this complex zone. This paper discusses the 'art economy' of the Aboriginal visual arts industry in Australia. For the first time, objective evidence and fine-grained detail of the sector's economic circumstances is available and is being used by actors in the value chain.

KEYWORDS

Visual art, Aboriginal art, value chain, art market, art economies

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The Economy of Place – a Place in the Economy

A Value Chain Study of the Remote Aboriginal and Torres Strait Islander Arts Sector

Introduction

The art of Aboriginal and Torres Strait Islander Australia is ‘one of the longest continuous traditions of art in the world, dating back at least fifty millennia’ (Caruana 2003:7). This continuity has enabled the art to travel from its origins in traditional spiritual and religious expression into mainstream art worlds.

Since colonisation, exchanges of Aboriginal and Torres Strait Islander art has been symbolic of, and at times central to, the shifting and difficult relationships between Aboriginal and Torres Strait Islander people and settler Australians. The evolutionist thinking that characterised much of Australia’s nineteenth and twentieth century public and social policy had ‘declared the discrete Aboriginal culture redundant’ (Caruana 2003:16). For most of this time, cultural objects of value to Aboriginal and Torres Strait Islander people remained largely invisible to all but a few explorers, missionaries and anthropologists (Batty 2011; Kleinert 1994; McLean 2011; Morphy 1998, 2005).

Anthropologists ‘first systematically collected and studied Aboriginal art and organised its first substantial exhibition’ in 1929 (McLean 2011:23). The shift from ethnographic interest to contemporary art began in the 1950s, as the ‘long-term blindness’ (ibid.) of the Australian art world began to see these works less as curiosities or souvenirs and increasingly as ‘fine art’ (Myers 2001, 2002). As Aboriginal art emerged into wider consciousness, accompanying discourses also grew (McLean ibid:26), linked to wider social changes in Australia, such as Aboriginal and Torres Strait Islander self-determination and political activism, which accelerated the new and increasingly complex reception of Aboriginal art as such (Caruana 2003).

The early 1970s saw the creation of the Aboriginal Arts Board within the Australia Council (Genocchio 2008; Morphy 2005; Myers 2001, 2002), bringing together leading Aboriginal and Torres Strait Islander artists and non-Indigenous art world professionals. These people

became advocates, curators, promoters, marketers and funders of art production in remote Aboriginal and Torres Strait Islander communities.

Concurrently, a new art movement was beginning in the desert community of Papunya (Bardon 1991; Bardon & Bardon 2004; Johnson 2008, 2010). The Papunya Tula Artists cooperative that was formed created, in many ways, the template for the organised production and community-controlled institutions that now characterise the contemporary remote arts sector. The acrylic-on-canvas dotting techniques of those 'first' desert artists developed and expanded into a global phenomenon (see, for example, Tamura 1994).

By the 1980s, the production of Aboriginal and Torres Strait Islander art had become commercial, organised by both community-controlled cooperatives (May 2006) and private art businesses. This new stage in the Aboriginal and Torres Strait Islander art movement generated new art, new skills and new businesses, with the works gaining international recognition (Ryan & Batty et al. 2011) and an unprecedented presence in Australia's auction market (Myers 2002). Since the 1980s, Aboriginal and Torres Strait Islander art has become embedded into the Australian cultural and social landscape and is a significant force in the Australian art trade (Coate 2009; Wilson-Anastasios 2008).

Over the past 40 years, Aboriginal and Torres Strait Islander art has created considerable wealth for collector-investors (Oster 2009); however, the benefits of this market have flowed back to artists, their families and communities unevenly and unpredictably. Art writer Ben Genocchio (2008) summarises the contradictions of Aboriginal and Torres Strait Islander people's apparently successful art-based participation in the economy: '[n]one of this money-mad speculation connects to the remote world of Aboriginal settlements, which gain little from the global art trade, but are among the most vulnerable to its adverse effects' (2008:216).

Rationale

Since the first commercial successes of Aboriginal and Torres Strait Islander art in the 1970s there has been an enduring focus on the question of 'how much is it worth'? This question is emblematic of the multiple, and often competing interests in the sector. These interests range from government policy that supports the 'art industry' as one of the only forms of non-welfare income and as a way of engaging in the mainstream economy, through to being a means of addressing political marginalisation. Some claim that visual art production contributes far more than sales income to remote communities: cultural maintenance, skills

development and other forms of social capital are frequently cited benefits. Others argue that the production of art in remote communities is heavily supported by a few highly successful artists and government funding, and that the sector should be more market-focused.

Aboriginal and Torres Strait Islander art is today a complex and global phenomenon, where enterprise and economic opportunity mesh with historical, moral, social and political issues (Genocchio 2008; Kleinert 2010; Myers 2002). The Aboriginal and Torres Strait Islander art market spectrum runs from the extremes of 'fine art', where scarcity, uniqueness and 'beauty' are valued above all else, to the opposite end, where 'tourist art' – handcrafted or manufactured – can be a cliché of dots, didgeridoos and boomerangs and mass-produced souvenirs and art works of sometimes dubious provenance are widely marketed through private websites, auctions and in tourist precincts. In between the 'fine art' and 'tourist art' categories, there are a range of other descriptive categories, including 'emerging artists' and 'mid-career artists'.

This highly variable marketplace reflects the range of agents' commercial practices, as they enact a growing range of intercultural business models (Altman 2005; Coate 2009; Hoegh-Guldberg 2002; Wilson-Anastasios 2010). The different market segments are entangled, presenting considerable challenges in defining and understanding the market forces and commercial strategies in play (Altman 2005; Coate 2009; Hoegh-Guldberg 2002; Wilson-Anastasios 2008).

Complex change continues in the sector and the market. The 2007–2008 global financial crisis triggered a large and ongoing market contraction. At the same time major public policy changes, combined with demographic changes in remote Australia are impacting on community livelihoods and, consequently, the ways that Aboriginal and Torres Strait Islander art is made and sold.

Despite the profile of Aboriginal and Torres Strait Islander art, its prominence in Australia's cultural landscape and the reliance by both public and commercial agencies on its continuation, there has been no sustained research into the scope and scale of the sector. Little solid, national evidence has been available to assist in understanding the circumstances of artists, the commercial trends or the impacts of government funding. In the absence of any centralised data encompassing art production activities across all remote zones, existing claims about the economic value of 'the market', numbers of painters, per annum sales, etc. are at best informed estimates. A 2007 Senate Inquiry (Commonwealth of Australia 2007) recognised the difficulties of collecting and analysing industry data: what

should be measured (given the wildly different cultural and commercial values in play)? What definitions of 'Aboriginal and Torres Strait Islander', 'art' and who is an 'artist' are to be used? When and how are sales happening? A key conclusion of the Senate Inquiry was that despite the massive growth in the industry, there is no certainty that this growth led to similar increases in returns to artists, or whether 'more of the value of the market is being secured by participants other than the artists' (Commonwealth of Australia 2007a:13).

It is into this terrain that a major research project was undertaken by the Cooperative Research Centre for Remote Economic Participation (CRC-REP). Over five years, from 2011 to 2016, the Aboriginal and Torres Strait Islander Art Economies Project (AEP) analysed and investigated a range of issues relevant to artists, agents and audiences in the production, sale and consumption of art. The flagship research for the AEP was a value chain analysis of the remote Aboriginal and Torres Strait Islander art sector – the first time a detailed, national study has been completed.

Context

The Art Economies Value Chain (AEVC) project set out to understand the production and trade of art products from remote Australia to global markets. The research focused on key sections of the value chain: the production of Aboriginal and Torres Strait Islander art products through a network of publicly funded art centres; the sale of these art products by art and cultural centres and private businesses (art agents, galleries and mixed businesses); their value and pricing structure; the role of state funding and the financial circumstances of remote area artists and art enterprises. This project did not assess art for ceremonial or cultural purposes and it looked only at the primary sale of these art products. The secondary auction and gallery markets were not included in the analysis.

An additional research priority was to focus on art production and sales from remote Australia, some 86% of the country's area, though home to just 3% of the population. However, remote Australia is home to around one quarter of all Aboriginal and Torres Strait Islander people, many of them living in around 1000 isolated settlements, or communities. These communities are often small, with populations of between 100 and 300. They face significant disadvantage and report many of Australia's worst rates for health and wellbeing, education and poverty. However, these communities are also a source of important cultural continuity and strength; many are located on ancestral country and/or on land now owned by Aboriginal or Islander people under Australia's native title regime. It is in this complex

environment that a network of art centres is located, and it is these art centres that produce the great majority of the Aboriginal and Torres Strait Islander art that is traded and exhibited.

Art centres are community-controlled and government-supported art cooperatives. Art centres are simultaneously social, cultural and economic enterprises. These creative base camps directly support artists – the majority of whom maintain traditional cultural knowledge, languages and connections to country – to produce and sell their art through a variety of business models. Income derived from art centre sales both supports extended family networks and is invested in art centre operations. All but a few art centres receive government support and subsidy. Their number and distribution has grown and now encompasses around 90 art centres in remote regions of the Northern Territory, Queensland, South Australia and Western Australia.

INSERT FIGURE 1 ABOUT HERE

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



This AEVC research fills crucial gaps in our understanding of remote area Aboriginal and Torres Strait Islander art production. This research provides art sector participants and stakeholders with baseline data on the scope and scale of the sector, providing accurate and detailed evidence that contributes to a better understanding of economic and commercial issues for remote area Aboriginal and Torres Strait Islander art, artists and communities. This is in keeping with the CRC-REP's mandate of industry-focussed and practical research in general, and in seeking ways to improve the livelihoods of remote area Aboriginal and Torres Strait Islander people.

Methodology

Previous work describing the Aboriginal and Torres Strait Islander art economy has primarily used data from the auction sector (Coate 2009, Wilson-Anastasios 2008), with limited attention to other sectors of the value chain or has been anecdotal in nature. Such economic analysis forms a small subset of the existing, wider body of research into Aboriginal and Torres Strait Islander art, most of which takes an anthropological or art historical approach (see for example, Jorgensen and Brooks 2015 or Bardon and Bardon 2004).

The overall CRC-REP Aboriginal and Torres Strait Islander Art Economies Project emphasises that art production and its value to communities are affected by many factors and the wider work of the Project has examined some of these areas; for example, the crucial role of staff and human resources in remote art centres, from both Aboriginal and Torres Strait Islander (Acker and Congreve 2015) and settler Australian perspectives (Whittle 2013). The success and failure factors of art centres has been assessed in the work of Petersen (2016), as has the way the information economy impacts on these remote enterprises in the work of Bendor (2015). Another important line of inquiry was understanding the perceptions and decision making of buyers of Aboriginal and Torres Strait Islander art. For 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; the work of Booth (2014) researched and analysed, for the first time, buyer behaviour in the primary art market, particularly at middle and lower price points.

The majority of the AEP's research program overlaps with and uses insights gained from the work of the Art Economies Value Chain reports. These 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 for the first time.

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 art centres, the artists supported by these centres and the private art businesses who (along with some public art businesses) trade in art products (see Figure 2). Data was sourced from all three sets of stakeholders, as follows:

- ▶ Government agencies: funding information from local, State/Territory and Federal arts and arts-related agencies.

- ▶ Art centres: production and sales information from a stock control database used by the centres and profit/loss statements from annual audits.
- ▶ Private art businesses: survey of art businesses.

This data was analysed by location, time period and product type:

- ▶ Spatial: clustered by artistic and cultural traits, remote Australia was divided into 12 art regions to quantify art production, sales and funding (see Figure 1). This enabled some fine-grained analysis, while not identifying any art centres.
- ▶ Temporal: depending on data quality and quantity, different time periods were analysed.
- ▶ Products: defined by several variables, including stock and sold date, price category, product category and painting size.

Findings

These findings draw on data provided from all funding agencies, around 95% of art centres, over 10,000 artists and the 250,000 artworks they had produced and 136 art businesses. The full analysis is presented in a series of four reports and a synthesis report (Acker and Woodhead 2014, Woodhead and Acker 2014a, 2014b, 2014c, 2014d).

Art Centres

Funding of remote area art centres by government agencies is an important, long-term feature of the sector. This funding is, by and large, efficiently delivered, providing support for over 90% of Aboriginal and Torres Strait Islander artists working in remote Australia. It is also notable that, in the face of considerable instability in policy and programs for Aboriginal and Torres Strait Islander people generally, that arts funding has been a constant, having been in place since 1989.

However, in 2009/10¹ a new funding policy triggered a significant change in the way many art centres operate. This new policy, the Indigenous Employment Initiative, has doubled the amount of funding available, but this funding is specifically for the employment and training of arts workers, not for the traditional core work of art centres – the production and sale of art. In 2014/15 primary arts funding was \$10.3million, while employment funding was

¹ Funding and financial information was provided in a financial year format, from June to June.

\$9.3million – together these provide around 85% of total funds to remote art centres. This change in funding mix has seen changes to the way art centres work, with the training and employment of Aboriginal and Torres Strait Islander people now competing with artistic practice. As shown in Figure 2 art centres are also increasingly dependent on funding and wages are now their largest expense – outstripping the traditional focus on payments to artists². These changes to the funding environment are also coupled to the changing commercial fortunes of art centres. Art centres have seen a long-term decline in sales brought about by an interplay of several issues, including the Global Financial Crisis, policy and regulatory changes, reputational problems and over-supply.

INSERT FIGURE 2 AROUND HERE

Caption: Art centre financial indicators, 2004/05 to 2014/15.

In total, this has resulted in a substantial fall in the financial resilience of art centres. For example, in 2012/13, the mean of all remote art centres' retained earnings was, for the first time, a loss; nine years earlier, when good records began, mean retained earnings were \$106,000. Similarly, the percentage of art centres reporting a profit has fallen from over 80% in 2004/05 to 40% in 2012/13. The two most recent financial years has seen some recovery, with a modest but consistent growth in sales, a small bounce in mean retained earnings back to a neutral position and an increase in the number of art centres recording profit.

Reflecting the diversity of Aboriginal and Torres Strait Islander culture, art centres produce, market and sell a wide range of artworks, from paintings on various media, printmaking, sculpture, fibre and textiles, new media and ceramics. However, paintings dominate production, accounting for over 90% of all works produced and sold. Sculpture, which included all forms of three-dimensional work, was the next biggest category, at 5% of production. In keeping with this overwhelming preference for paintings on canvas, the western desert region accounts for around 50% of all production from remote Australia. This, in part, reflects the size of the region and the size of many of the art centres within the region, but also the strong historical links; this is the region where the contemporary iteration of Aboriginal and Torres Strait Islander art as a commercial force began in the early 1970s.

² Art centres generally operate on a commission-basis; that is, finished artworks are left with the centre until sale, whereupon the artist is paid around 60% of the sale price. The rest is retained by the art centre to cover costs and reinvest in the enterprise.

Analysis of painting production also showed some clear trends on size and price points. Almost 90% of all paintings sold for under \$1000 and 66% sold for under \$250. This corresponds to other data, such as increased production and market share of smaller sized paintings and that smaller paintings (30 x 30cm) were the only size category that increased in mean value over time, highlighting that the primary production and sales avenue for most Aboriginal and Torres Strait Islander art is with small, portable, affordable paintings.

In contrast, while 'hero paintings' – those that sell for \$5000 or more – account for less than 1% of sales they remain important for the art centres as they generate more than 20% of all sales income. However, these top line artists and artworks have also seen the most significant declines and have become harder to sell, as the market contracted sharply since 2007. Large, expensive works remain in stock longer, their market share has fallen and returns for these established artists has fallen further (around 50%) than for other artist categories.

One of the central findings of the production and sales analysis was identifying the over-production of artworks, particularly paintings. Annual sales peaked in 2007³, but painting production increased until 2009/10 (over 19,000 products). By 2012, production had fallen back to around 14,000 products – the same as in 2007; however, sales in 2012 were \$6.3million, compared to \$11.6million for 2007. This 45% decline in sales had repercussions for artists and their enterprises and this resulting over-supply has accelerated a fall in the mean price of a painting. In 2005, the mean sale price for a painting was \$885; by 2012, the mean sale price was \$449, as shown in Figure 3. While increased volumes of paintings (and increased numbers of artists producing them) compensated to some extent for these falls, in remote community settings, where art-income is often the only form of non-welfare income, this decline was deeply felt.

INSERT FIGURE 3 AROUND HERE

Caption: Mean sale price of a painting, 2004/05 to 2012/13.

Total annual sales for remote Aboriginal and Torres Strait Islander art centres are, even with the data assembled for this project, difficult to provide with accuracy. From the data, annual sales over recent years have been around \$20million; using the average commission rate of 60%, around \$12million in independent, enterprise-based income is paid to artists each year. However, a small number of large art centres were not able to contribute data; informed

³ Sales data was provided in calendar year format.

estimates of these sales is around \$6-8million per year, pushing the total annual sales generated by this network of small, remote-area enterprises to around \$28million.

The art centre analysis also highlighted the steep commercial hierarchy art centres operate within. A small number of large, established art centres dominate, generating around 70% of all sales. Almost 60% of art centres make less than \$250,000 per year in sales, and many make around \$100,000 per year, highlighting the small scale of many of these enterprises.

Artists

The research identified over 13,000 artists who had, or were working for art centres in remote Australia. Of this total, 33% had gender and age data enabling further analysis. An estimate was made of the number of independent artists – those artists who are working partially or fully outside of the art centre network; the estimated 875 artists working this way represent around 6% of all artists, highlighting the extensive and, largely successful, role of art centres in remote Australia.

While over 70% of artists in remote Aboriginal and Torres Strait Islander art centres are female, they achieve a significantly lower average sale price for their works than do male artists; between 2008 and 2012, the average sale price for female artists was \$414, compared to \$661 for male artists. However, the higher mean value that male artists are achieving is because male artists produce fewer low value products than female artists during their career. Male artists are not necessarily achieving higher prices for individual art works than females and in fact highly productive female artists actually receive higher average prices than male artists.

It is often observed that many Aboriginal and Torres Strait Islander artists are elderly and research results affirmed this. Artists over 55 years old account for 30% of the artist population and 55% of the value of sales. Their sales are primarily derived from higher value (over \$5000) art products. Younger artists produce less valuable art products, primarily products valued at under \$1000.

As alluded to earlier, the Aboriginal and Torres Strait Islander art sector attracts strong and, often polarised debate. One of the perceptions, both within and outside of the sector is that Aboriginal art is lucrative and that Aboriginal artists are wealthy. In further analysis of gender and productivity these perceptions were found to be far from true (Woodhead and Acker 2015). Only eight art centre artists (or 0.27% of all artists) had career earnings of

more than \$1million, whereas more than 70% of artists earned less than \$10,000 over their entire career. Similarly, nearly 90% of artists produced less than 99 artworks over their careers, further highlighting that for a large majority of artists, art making is a part-time activity, done to supplement incomes and likely as much for social and cultural reasons.

Conclusion

The Aboriginal and Torres Strait Islander art economy is a complex, intercultural and shifting sector that links (often very old) cultural and social traditions with the twenty-first century art market. As one of its key activities, the Aboriginal and Torres Strait Islander Art Economies project designed the Art Economies Value Chain research; the AEVC spent three years tackling one of the sector's most enduring – and, it must be said, loosely framed – questions: how much is the Aboriginal and Torres Strait Islander art market 'worth'?

This question acknowledges that all previous existing measures of the sector, including assessment of the overall value, scope and scale are based on varying and contested estimates. This knowledge deficit presents considerable challenges to the sector for setting policy and in advocating for, and sustaining remote area enterprise.

We believe that this research gives – for the first time – detailed knowledge to Aboriginal and Torres Strait Islander art enterprises, their partners and funding agencies on the financial forces at work in their sector. With numerous, sometimes competing and often externally imposed expectations directed at art centres (to be a 'viable' business, to produce art of 'export quality', to provide employment, to support cultural maintenance, to develop the next generation of artists, to engage young people in creative practice etc) evidence about the challenges, opportunities and realities of running an art enterprise in isolated and marginalised communities is invaluable.

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Figures

Figure 1:

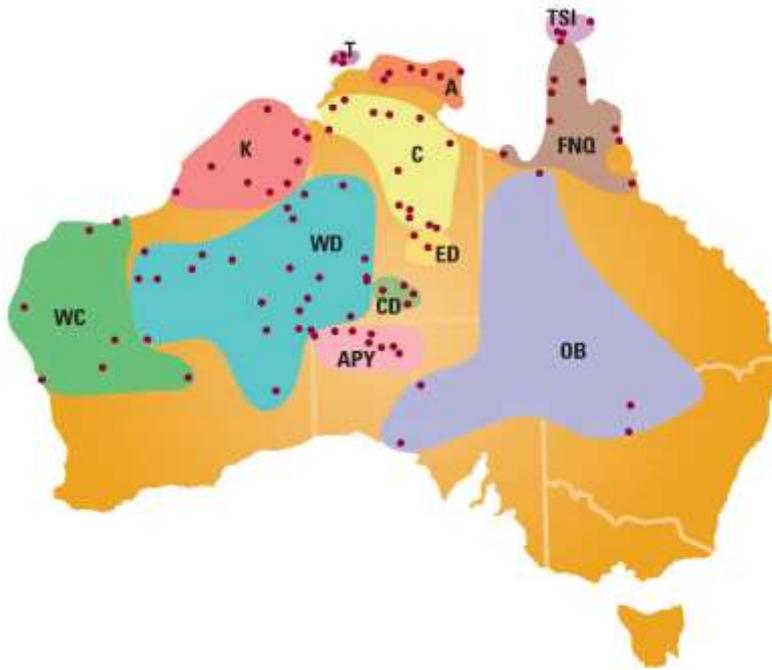


Figure 2:

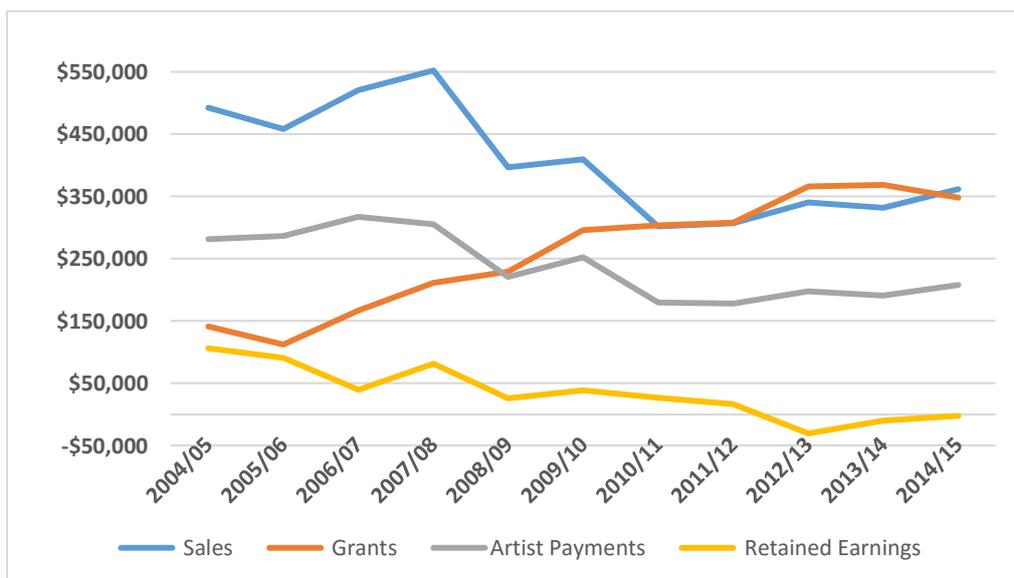


Figure 3:

