

The All Conference Artist-run Initiatives Sub- sector

A commissioned report by
Ben Eltham and Catherine Ryan

Introduction

In 2017 All Conference invited Dr Ben Eltham at Monash University's School of Media, Film and Journalism to investigate the characteristics of Australia's small-scale visual arts artist-run initiative (ARI) sector.

In particular, Dr Eltham was asked to prepare a report on the All Conference member organisations and their role in Australian culture. The research brief requested a report that could place the All Conference member organisations within an industrial context, detail the available quantitative and qualitative evidence base, analyse current cultural policy settings as they affect the sector and make recommendations for the future. This report draws on extensive research conducted by the authors, with the assistance of Georgia Hutchison.

The structure of the report is as follows: a short review of the literature establishes the current state of the academic and cultural evidence base as it relates to ARIs in Australia. Current data on the visual arts in Australia is detailed, and existing policy settings affecting the ARI sector are reported. The literature review also seeks to place ARIs in the broader context of Australian culture to propose a way in which we might understand their cultural value.

Following this, the paper sets out the findings of the research gathered. The quantitative data presented firmly establishes the high levels of artistic production characteristic of the sector, and provides a baseline with which to benchmark Australian ARIs against other parts of the Australian cultural industries. Equally important, the qualitative data is rich in insight, providing much food for thought for the sector—both for artists and artswomen—and for policymakers.

Finally, the implications of these findings are discussed, and some recommendations for policymakers are made.

The Visual Arts Sector in Australia: a Review of the Literature

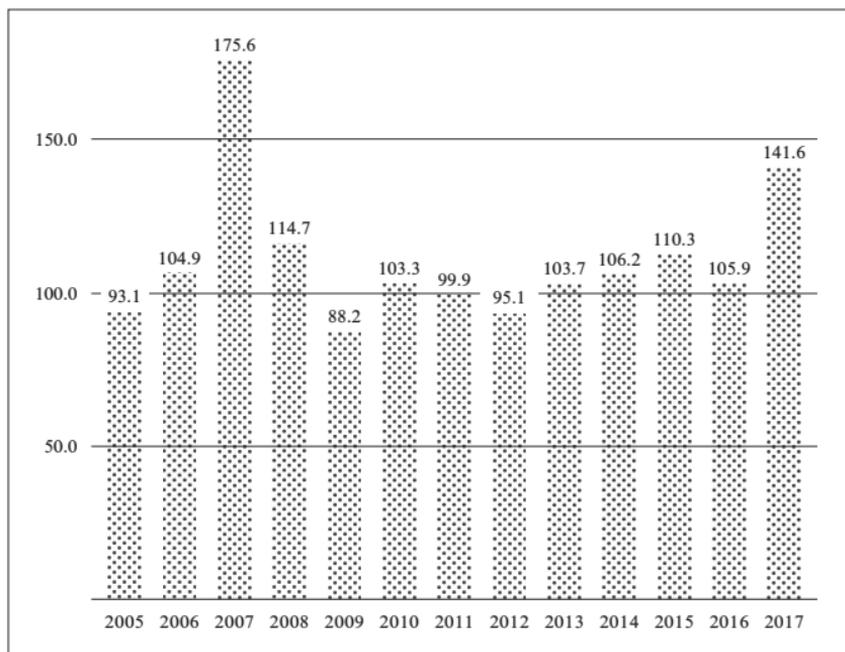
The visual arts have a long and distinguished history on this continent (Grishin, 2015; Hughes, 1981). Aboriginal and Torres Strait Islander visual arts date back at least 60,000 years in continuous tradition, and remain some of the most important and iconic Australian art practices today. Since the colonisation of the Australian continent by the British government in 1788, visual art has remained a key medium of symbolism and communication, from the early convict paintings of Thomas Watling to the sophisticated scene of the present day. (Fig.1)

The visual arts are a core component of contemporary Australian culture. Australian economist David Thorsby estimates that there were approximately 8,600 visual artists and 3,000 craft practitioners working professionally in Australia in 2016 (Thorsby and Petetskaya, 2017: 24), while ABS Census data puts the figure for visual arts and craft professionals slightly higher, at 16,498, in 2016.

The visual arts constitute one of the fundamental artistic expressions and one of the most iconic aspects of broader Australian culture. More than nine million Australians attended a visual arts and craft event or venue in 2016 (Australian Bureau of Statistics, 2015a) and more Australians visit an art gallery each year than attend a football match (Australian Bureau of Statistics, 2012). Australians are also avid participants in visual arts and craft activities: more than four million Australians participated in either the visual arts or crafts in 2013–2014 (Australian Bureau of Statistics, 2015b). According to the Australia Council for the Arts national arts participation survey, forty-five per cent of Australians attended a visual arts (Fig.2) event in 2016 and thirty per cent participated in visual arts or craft activities (Australia Council for the Arts, 2017). (Fig.3)

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Fig.1 Australian commercial art sales, 2005–17. M\$



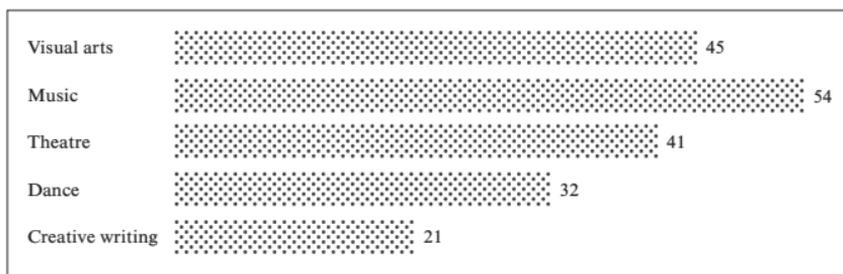
Reference Australian art sales digest (Furphy 2018)

At the top end of the Australian visual art industry, there is clear evidence of impressive audience demand for contemporary visual art, including sales of living Australian artists' works. Success stories like Brisbane's Gallery of Modern Art (QAGOMA) and Hobart's Museum of Old and New Art (MONA) have pulled in record crowds in recent years: QAGOMA pulled in more than two million visitors while MONA is officially Tasmania's second-largest tourist attraction (Queensland Art Gallery, 2018; Tourism Tasmania, 2017). Meanwhile, 2017 was the best year for commercial art sales since the global financial crisis, according to one long-running Australian art sales digest (Furphy, 2018).

Despite this robust sales and audience data, the visual arts remain a difficult and precarious industry for artists. The most authoritative recent data on the incomes of working visual artists in Australia, by Throsby and Petetskaya (2017: 74), puts their mean annual income from artistic practice at \$28,800 in 2014–2015. However, this figure obscures the large number of artists who are earning substantially less; the median figure given by Throsby and Petetskaya is just \$12,000 per annum. This means that *half* of all artists earn *less* than this figure. By way of context, the Melbourne Institute of Applied Social and Economic Research puts the Australian poverty line at \$26,912 in June 2015 dollars (Melbourne Institute for Applied Economic and Social Research, 2015) and the median household income for a single person in 2015–2016 was \$84,400 (author's calculation based on the 2016 Survey of Income and Housing; Australian Bureau of Statistics, 2017). (Fig.4)

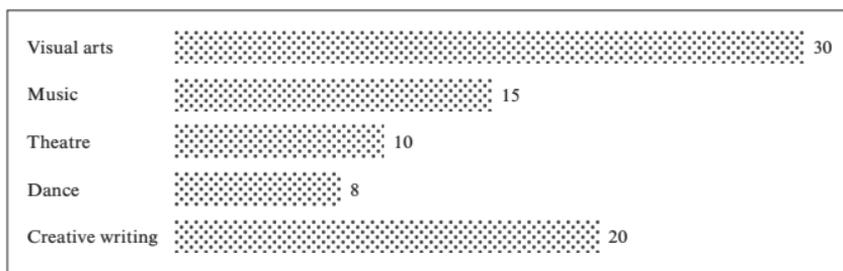
The disparities in the data show that while audiences and collectors are flocking to see and buy Australian art, working visual artists in this country suffer significant levels of poverty and disadvantage. This points to an endemic market failure in the visual arts sector, characteristic of cultural and creative industries in other countries and at other times (Frey,

Fig. 2 Participation in the creative arts, 2016.
Percentage of Australians who took part in creative event by artform.



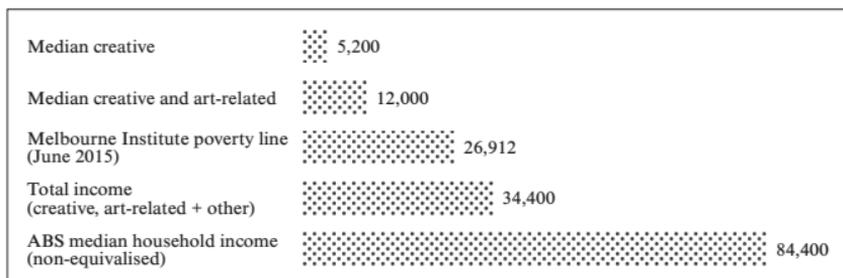
Reference Australia Council (2017)

Fig. 3 Participation in the creative arts, 2016.
Percentage of Australians who took part in creative activity by artform.



Reference Australia Council (2017)

Fig. 4 Incomes of Australian visual artists, 2014–15
Figures are per annum for the 2014–15 financial year and given in 2015 dollars.
Incomes are gross and non-equivalised.



Source Throsby and Petetskaya, 2017

2003; Baumol and Bowen, 1966). While art markets can return spectacular growth for lucky investors, they are much less successful at delivering a decent income for artists. Art markets are also well-known for producing extreme levels of inequality (Menger, 2015). As the economist Sherwin Rosen proposed in 1981, the visual arts suffer from the problem of ‘superstar economics,’ in which a few household names command vast wealth and reputation while the vast bulk of working artists struggle in penurious obscurity (Thornton, 2008; Rosen, 1981; Frank and Cook, 1995).

Between avid audiences and struggling artists lies a large group of ‘cultural intermediaries,’ including gallerists, dealers, curators, collectors and private and public institutions. In order to understand how the Australian visual arts sector creates, produces and distributes works of art, we need to understand the shape of the sector and to map the way creativity and value flows between its various component parts.

Mapping ARIs within the Australian Visual Arts Sector

The role of artist-run initiatives (ARIs) has long been understood to be important in the Australian visual arts sector. They first came to the attention of the Australia Council for the Arts in the mid-1980s (Brown, 1987), and by 2002 the Myer Review into the Australian visual arts sector saw them as significant enough to merit a dedicated entry in its final report:

Artist-run initiatives (ARIs) can be loosely defined as ‘those facilities, such as exhibition venues, studios, workshops, information and resource centres, which have been established and are maintained on a cooperative basis by groups of artists.’ (K. Brown, Artist Run Spaces,

Report to the Visual Arts Board, Australia Council, Sydney, 1987, page 1). ARIs are primarily exhibition spaces, sometimes incorporating studio spaces, run by a collective of practising artists and ranging from part-time short-term projects to long established legal entities. ARIs are distinct from contemporary arts organisations and commercial galleries in that they generally charge rental fees to artists exhibiting in them, and are run collectively by a group of artists, as opposed to employing dedicated administration staff, or having a Board of Directors.

The ARI sub-sector itself has also undertaken a significant amount of research and bibliography into its own activity, and across the past two decades there has been a conscious effort by a number of institutions to collate and publish semi-scholarly and self-published work drawing this together—including, of course, the work currently being undertaken by All Conference (Goodwin, 2016).

This body of literature is now rich and quite detailed, establishing a historical lineage and a shared sociocultural philosophy (see Doig and Horwitz, 1989; Jones, 2004; Heagney, 2007; Green, 2010; Griffiths, 2012; Murray, 2014; Goodwin, 2016; Noone, 2016). Several themes emerge from a survey of this literature. Artist-run spaces are not merely transient projects by undergraduates. They embody a nuanced and highly resourceful response to the economic challenges faced by working artists and small-scale cultural practice. They have repeatedly demonstrated highly successful adaptations to the constantly evolving artistic environment while maintaining a shared commitment to artistic autonomy, small-scale economic independence, diverse practice and a nimble and flexible operational doctrine. ARIs are some of the great unheralded success stories of Australian culture.

As Murray argued in her report on the contemporary visual arts sector for the Australia Council for the Arts in 2014:

Artists are often drawn to artist-led projects because they offer the space for experimentation, the opportunity to sharpen critical and professional skills, and support for all forms of art practice and artists of all ages and stages. There is a wide variety of artist-led projects, such as those clustered around spaces, projects or magazines. Participants identified a common perception among policy makers that artists are involved in these initiatives as stepping stones towards a more lucrative career. However, many artists continue to be involved with artist-led projects throughout their careers, and participants expressed frustration at policies that conflate artist-led practice with ‘young and emerging’ (Murray, 2014: 11).

Placing Artist-run Initiatives in Australian Culture

Where, then, can we place ARIs in the Australian visual arts sector, and in Australian culture at large?

The Australian visual arts ecosystem can be conceptualised in a number of different ways. In their recent report on the small-to-medium visual arts sector, the research consultancy Economists at Large developed a six-part definition for the National Association of Visual Arts (Campbell et al., 2017). This report divided the small-to-medium sector into six key groups. Notably, the ARI sector was placed within this.

The Economists at Large analysis is valuable for placing the ARI community within a larger ecosystem

of small and medium-sized arts organisations. However, the analysis omits some other crucial players in the sector, notably artists themselves as well as major state capital art galleries, visual arts audiences and training institutions, such as universities and collectors. In addition, the visual arts market features a significant secondary art market for works that are re-sold after their initial exhibition and sale; this secondary market is in fact larger than the primary one and many people think of it as making up the most important economic and symbolic aspect of the art market (Thornton, 2008).

There is a tension that exists between the art market and ARIs. The fact that art markets, in some cases, secure lucrative sales income for lucky artists cannot disguise the fact that most artists do not make a living by the sale of their work, and that even commercially successful artists can often struggle to secure a living wage from their creative income. ARIs operate both within and outside capitalist art markets, sometimes selling works for the profit of their exhibiting artists or to fundraise for their own activities, but more frequently providing cheap and accessible opportunities for artists to make and exhibit work outside the constraints of more aggressively for-profit commercial galleries and dealers. (Fig. 5)

Another way of conceptualising the visual arts sector is via a more traditional supply (or value) chain analysis, in which value and creativity is considered to flow between artists at one end of the chain and consumers and audiences at the other end (Thompson, 2010: 15; Madudova, 2017). In between the artists and the audiences lies much of what we call ‘the industry,’ the parts of the supply chain that link artists making art to audiences consuming it. One way of understanding this is as a field of cultural production, connecting artists to audiences via a whole social strata of cultural intermediaries (Bourdieu, 1986), such as agents, managers, curators, dealers, gallerists, critics and so on. But we can also understand the middle parts of

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Fig. 5 Classifying the 52M arts ecosystem.
Economists at Large classification of the small-to-medium visual arts sector for the National Association for the Visual Arts (Economists at Large, 2017).

	Primary input/funding	Role in arts ecosystem
Artist-run initiatives (ARIs)	Volunteers	Creating new artwork Experimentation and risk
Contemporary arts organisations (CAO)	State and federal government	Exposing art to larger audiences, international connection, advocacy and professional development
Craft and design centres (C&DCs)	Sales, state and federal government	Craft skills development and exposure and retail
Metro galleries	State and local government	Exhibition spaces. Attracting attention from larger galleries
Regional galleries	Local government	Bringing art to the regions and supporting regional artists
Service organisations	State and federal government	Advocacy, sector co-ordination, service provision and professional development

Source Economists at Large, 2017

the supply chain as stages in the production process of a cultural industry (Hesmondhalgh, 2012; O'Connor, 2011). Art is a global industry of luxury goods in which works are selected, purchased, packaged and sold by large corporations and high-net wealth individuals. The major players include top commercial gallerists and dealers, major public galleries, international biennales and art fairs and the ultra-wealthy collectors and philanthropists with the disposable income to buy at the top tier of the global art market (Horowitz, 2011; Hesmondhalgh, 2006; Thornton, 2008; Thompson, 2008). ARIs occupy a small but highly significant niche within this larger global industry, providing spaces for artists to exhibit and incubate new and exciting artistic practices and expressions.

A Supply Chain Model of the ARI Sub-sector

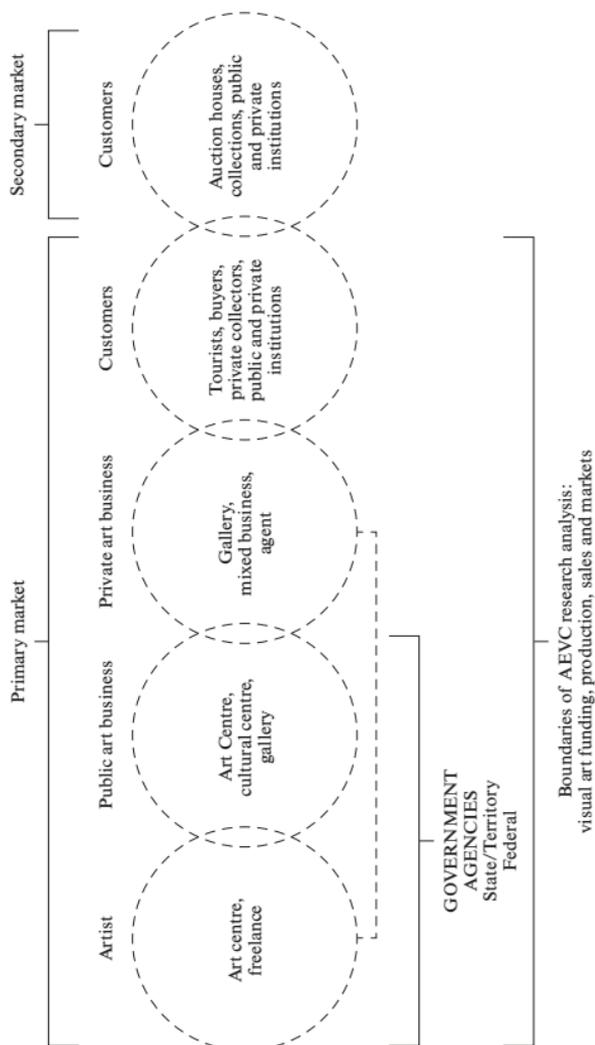
What, then, would a supply chain for ARIs look like?

The best model in the context of the small-scale visual arts sector in Australia was devised by researchers Alice Woodhead and Tim Acker, who in 2014 developed a supply chain model for Indigenous visual arts centres in remote Australia (Woodhead and Acker, 2014). Insightful recent work by Morrow in the music industry is also relevant (Morrow, 2017). Drawing on this research, we can propose a modified version of Woodhead and Acker's model for the ARI sector as depicted in Fig. 6. In this modified schematic, the broad outlines are similar but certain details have been amended. Value flows initially from artists and creators, through the supply chain of cultural intermediaries such as gallerists and dealers, and ultimately on to collectors of work and mass audiences for art at major public institutions and exhibitions. (Fig. 7)

The supply chain we model is not strictly linear: as the diagram suggests, there are several reflexivities

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Fig. 6 Woodhead and Acker's model of the visual arts value chain for Indigenous arts centres.



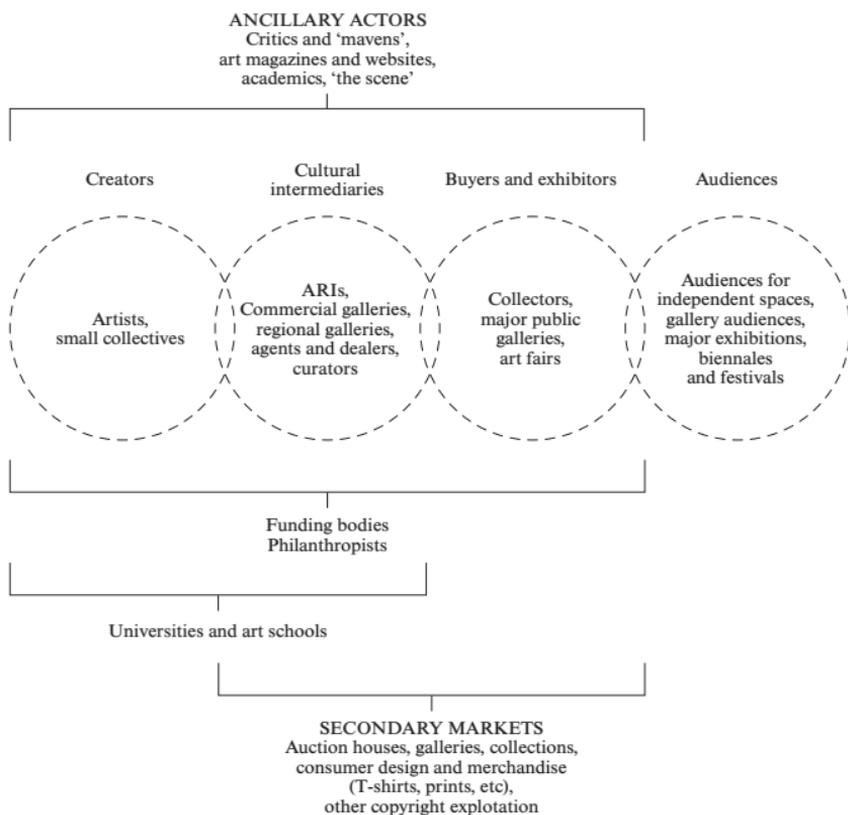
Source Woodhead and Acker, 2014: 10

and loops. Funding agencies intervene at multiple points in the chain, providing small but significant amounts of funding to artists, ARIs and regional galleries, and much larger amounts of funding to major public institutions. Universities produce a constant supply of ambitious young artists, a major input into the supply chain in the form of new cultural capital and low or unpaid workers (McRobbie, 2015). Philanthropists also intervene, often by funding major exhibitions and collections or by giving away art to a public gallery. Collectors can buy art at its first point of exhibition, often at an ARI or commercial gallery; they may then sell it on at a later date to the secondary market via an auction house. Other secondary markets exist in the form of commercial design and copyright exploitation: prints, T-shirts and other licensed products. Major public galleries acquire art in both primary and secondary markets, informed by both market values and the artistic judgment of their curators and directors. And there is a diffuse but vital cloud of what might be called ‘ancillary actors’ who make up the artworld ‘scene’ (Becker, 1982): art writers and critics, influential curators and art-specific media such as art magazines and websites, not to mention well-connected solo actors with educated judgment who often act as key influencers. We sometimes call these figures ‘buffs’ or ‘mavens’ (see Caves, 2000).

Of course, any conceptual representation like this can capture only so much about the street-level reality of cultural practice, especially one as complex as the visual arts. Supply or value chain models such as the one in Fig. 7 explicitly aim to describe the flow of goods and services within an industry. They cannot elaborate the multiple dimensions of artistic and cultural activity—the years of contemplation and experimentation that contribute to a particular artwork, the joy experienced by audiences, the enrichment of a neighbourhood by the presence of a small art gallery, or the stimulating conversations held at an opening. Economic discussions

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Fig. 7 A value chain for artist-run initiatives in Australia.



Source Authors' analysis, modified from Woodhead and Acker (2014).

of ARIs should not be allowed to replace social, cultural or critical analyses, and artists and citizens should resist attempts by policymakers to do so.

However, contextualising ARIs within a complex supply chain in this way does provide one useful frame of analysis. It suggests some important characteristics about their practice and place in the cultural economic landscape. As we shall see in the qualitative findings below, artists who make art, and artworkers who run independent spaces, move in a challenging environment. They are subject to both inexorable market forces, such as surging rent for commercial properties (Murray, 2014), and to evanescent sociocultural trends, such as the changing nature of their local art scenes and the fads and fashions of the national and international art markets (Caves, 2000; Hirsch, 1972). A constant supply of young artists from universities and art colleges provides fresh ideas and new members of the creative workforce, while also forcing down the fees and wages of artists (Menger, 2015). Because ARIs typically (but not exclusively) exhibit the work of artists at relatively early stages of their careers, they cannot produce blockbuster exhibitions for mass audiences, even if they wanted to. They are also unlikely to sell work for high prices, for which they might be able to take lucrative commissions.

In other words, the position of ARIs in the visual arts supply chain constrains their economic possibilities (Gordon-Nesbitt, 2012). But this does not mean their role is merely as a nursery or feeder-farm of artistic talent. In fact, as the quantitative findings outlined here suggest, they represent a vital and remarkably innovative source of artistic production in Australia's cultural industries. Despite economic challenges, a review of the Australian and international literature on these spaces clearly shows they have built a rich artistic legacy. ARIs in Australia support diverse and vibrant communities of practice; they are a keystone element of the visual arts ecology.

The Cultural Policy Environment for ARIs in Australia

As the economist (and founder of the Arts Council of England) John Maynard Keynes recognised, endemic market failures can occur in the cultural and creative industries and are best addressed by government policy such as direct subsidies to cultural organisations and artists (Keynes, 1982; Upchurch, 2004). Given the industrial disruption discussed above, it is apparent that artists and arts workers in Australia's ARI sector do suffer from glaring market failures, particularly in terms of incomes for artists and craft practitioners.

Despite their outsized artistic presence, ARIs have generally not been able to establish a strong presence in Australia's cultural policy literature, or in day-to-day policy discussions about arts funding and the future of Australian culture. In this they are not alone. Their marginalisation reflects a widespread emphasis on certain parts of the Australian cultural industries—in particular, the major performing arts companies funded by the Australia Council for the Arts—at the expense of large swathes of more grass-roots and independent cultural production (Eltham, 2009; Craik, 2007).

Current cultural policy settings remain quite difficult for ARIs. The key federal funding agency, the Australia Council for the Arts, devotes only eighteen per cent of its discretionary grants budget to the visual arts, \$13.7 million in 2017–2018 out of a total budget of \$189 million. This funding is shared between hundreds of individual artists, small collectives, small-to-medium organisations, public galleries and ARIs. In contrast, a single performing arts company, Opera Australia, receives more than \$20 million annually, and the twenty-eight major performing arts companies together receive around sixty-two per cent of the Australia Council for the Art's grant expenditure, equating to \$111 million in 2017–2018 (Australia Council, 2018).

State and local funding priorities are also skewed against ARIs. As the 2017 report by Economists at Large for the National Association for the Visual Arts (NAVA) found, the funding budgets of the states and territories are overwhelmingly devoted to the major capital city art galleries—the Art Gallery of New South Wales, the Queensland Art Gallery | Gallery of Modern Art and the National Gallery of Victoria (Campbell et al., 2017). Local government policy settings are more supportive, reflecting the historical focus of local government cultural policy on street-level and community-based cultural practices. Nonetheless, here too ARIs often run a distant second to the support given to regional galleries and visual arts institutions owned and operated by local government and councils. As a result, ARIs face a constrained funding environment with relatively limited amounts of cultural funding available, particularly when compared to other sectors of the arts and culture.

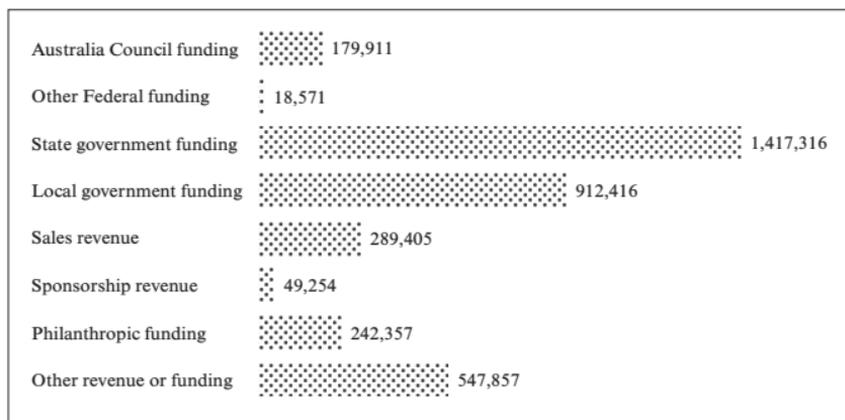
This is not to say that ARIs receive no arts funding. In fact, ARIs are highly reliant on government funding for their revenue base. The NAVA report found that more than two-thirds of the ARI revenue base derives from federal, state and local government funding. (Fig. 8)

While this is not a true reflection of the ability of ARIs to raise resources from their community (after all, it does not reflect the huge in-kind contributions in the form of free labour that these organisations typically rely on), it does show some of the challenges that these institutions face. Dependent on government funding despite its skew against them, ARIs also struggle to leverage financial investment from the free market, as might be expected of institutions that have historically acted outside of, or only tenuously connected to, market institutions.

That said, the current state of visual arts engagement represents a significant opportunity for future funding frameworks. The visual arts sector receives around half the federal funding it would receive were the Australia Council for the Arts’

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Fig. 8 ARI revenue sources, 2015–16.



Source Economists at Large, 2017

artform priorities reformed to reflect audience preferences. Indeed, their own data shows that the visual arts are the most popular artform for cultural participation and the second-most important artform for cultural attendance (see Fig. 2). But, as Fig. 8 shows, ARIs receive tiny amounts of Australia Council for the Arts support. There are strong arguments for this level of support to be expanded.

If funding imbalances were to be redressed by a future federal government, as has been hinted at by Labor's Shadow Minister for the Arts Tony Burke, ARIs would be strongly positioned to benefit from expanded Australia Council for the Arts funding. While the policy environment in the states and territories is less favourable, there is still some chance for expanded state funding outcomes. Concomitantly, arguments should be made to keep local government funding at their current levels. In summary, while increased funding is not a magic bullet for the resourcing issues of ARIs, there are sound arguments for increased funding, and any increase would make a significant difference.

The relatively low level of philanthropic and sponsorship income available to the sector also remains both a pressing challenge and a possible future opportunity. Existing federal and state policy initiatives that seek to leverage private sector philanthropy and web-based micro-philanthropy, such as the federal body Creative Partnerships Australia, have generally concentrated on large cultural organisations, such as the major galleries and performing arts companies. This has diversified in recent years, and one possible policy reform could involve a specific intervention by Creative Partnerships Australia encouraging giving to the ARI sector.

The Significance of ARIs:
a Cultural Value Approach

This paper adopts a methodological framework of *cultural value* in assessing the value of ARIs in Australian culture (Throsby, 2001; Belfiore and Firth, 2014). The concept of cultural value encompasses both the economic *and* non-economic value of culture. In the United Kingdom, the Warwick Commission on the Future of Cultural Value has recently completed an extensive report into the non-economic valuation of culture (Warwick Commission, 2015).

It is of course true that cultural activity produces economic impact—when artists sell works, for instance, or when exhibitions and biennales attract tourists to their host cities. But a cultural value framework stresses the importance of valuing culture on its own terms: the cultivation and enjoyment of the arts *in and of itself* (Holden, 2006; McCarthy et al, 2004). Thus, in assessing the contribution of ARIs such as the All Conference member institutions in Australia, it is worth asking what cultural value could look like. There is no great mystery here: the cultural value of a publication such as this can be ascribed to the value of activities such as *making, exhibiting and experiencing art*. Where an ARI exhibits new work from visual artists for an audience of discerning visitors, or where an ARI encourages informed writing, avid reading and engaged critical debate about the visual arts, it can be said to be directly contributing to Australia's cultural wellbeing.

Of course, we can't simply declare a definition of cultural value as easily as this. Culture is notoriously difficult to define, and value is very much in the eye of the beholder (Williams, 1983). Who is doing the valuing will make a big difference to what value we assign to a given cultural practice. Similarly, what sort of culture we're talking about will inevitably constrain and shape the valuations that a critic, an audience member or an arts minister may assign. As British scholars Kate

McLuskie and Kate Rumbold point out, ‘the defining characteristics of cultural value remain fluid, contested and open to constant negotiation’ (2018: 112).

Even so, we can assert that *ARIs create cultural value*. As the many authors canvassed in this literature review argue, ARIs support living artists and arts workers, providing meaningful sources of income and of artistic engagement. They manifestly produce and present large numbers of new works. They enable artists to reach like-minded collaborators and audiences, particularly for young and emerging artists but also for mid-career artists seeking to develop their practice. They incubate new styles and genres of visual creativity, forming a test-bed for artistic innovation and a laboratory where artists can trial new techniques and new ways of seeing (Berger, 1972). ARIs also constitute important environments for public debate about art, publishing critical writing and reflection about the arts and culture, and providing venues for public talks and panel discussions between artists, critics, curators and audiences. Finally, and far from negligibly, they provide a social space for artists to hang out in, contributing sociocultural value to the artworld by supporting the ‘scene’. All of these elements of cultural value are real and meaningful, and some of them can be quantitatively measured, as we show in our findings below.

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Fig. 9 Funding, audience and artistic output metrics for All Conference member organisations versus the broader visual arts sector.

SECTOR	FUNDING	AUDIENCES	ARTISTS	NEW WORKS
All Conference members†	\$668,875	115,171	1,309	1,526
Broader ARIs sector*	\$2,528,274	341,250	1300	18,785
Contemporary arts orgs*	\$7,195,883	483,910	506	924
Metro galleries*	\$15,977,448	1,010,500	1075	1,290
Regional galleries*	\$32,959,321	4,106,182	3,366	4,182
Major public galleries* . . .	\$196,368,072	8,376,634	n/a	126

SECTOR	FUNDING PER AUDIENCE MEMBER	FUNDING PER NEW WORK	FUNDING PER ARTIST
All Conference members†	\$5.81	\$438.32	\$510.98
Broader ARIs sector*	\$7.41	\$134.59	\$1,944.83
Contemporary arts orgs*	\$14.87	\$7,787.75	\$14,221.11
Metro galleries*	\$15.81	\$12,385.62	\$14,862.74
Regional galleries*	\$8.03	\$7,881.23	\$9,791.84
Major public galleries*	\$23.44	\$1,558,476.76	n/a

Source † All Conference member organisation data, reported here

* Economists at Large small-to-medium sector survey data, reported in *Economists at Large* (2017).

Quantitative Findings

A quantitative survey of the activity of the All Conference member organisations carried out for this research project shows the exceptional creativity and productivity of the ARI sector.

In raw terms, the All Conference organisations reached audiences of just over 100,000 people in 2016, exhibiting the work of 1,309 artists and at least 1526 new works. They were able to do this on the proverbial smell of an oily rag: just \$668,875 in total cultural funding across the All Conference member organisations. (Fig. 9)

All conference member organisations:

Key metrics

Funding: \$668,875

Audiences: 115,171

Artists exhibited: 1,309

New works: 1,526

The significance is clearly shown by these quantitative findings: the All Conference member organisations produce high levels of cultural value. They exhibit very large numbers of new works and profile the work of very high numbers of participating artists. They also reach surprisingly large audiences.

Benchmarking the All Conference Sub-sector

We can benchmark the performance of the All Conference members by comparing them to published data from the broader Australian visual arts sector. The second table in Figure 9 compares the All Conference member organisations with data from other parts of the visual arts sector reported in the *Economists at Large* study of 2017. All Conference member organisations have the smallest amount of aggregate

funding, but profile more artists than the contemporary arts organisations (ACCA, the IMA, etc.) or the metropolitan public galleries. The combined audience figure for All Conference member organisations of 115,171 visitors is around a fifth of the audience total of the contemporary arts organisations and a tenth of the metropolitan public galleries. However, All Conference members receive collectively much less than a fifth or a tenth of the total funding of these sectors.

One way of measuring this ‘bang for buck’ is to compare funding for the sectors in relative terms—per audience member, per new work exhibited, per artist profiled. On all of these measures, All Conference member organisations have the most productivity per funding dollar, except for new works where they are the second most productive (the broader ARI sector performs slightly better on this metric).

These quantitative findings underline the extraordinary cultural productivity of the All Conference member organisations. Not only do they produce very high levels of cultural output, but they also do this with less funding than any other part of the sector.

Qualitative Findings

Semi-structured interviews were conducted with representatives of All Conference members in order to gain qualitative insights into these organisations and their place in Australian culture.

The findings of these interviews can be summarised under the following themes:

- The precarious material situation of All Conference ARIs and publications
- The structure of these organisations
- Ambivalent feelings about professionalisation and bureaucracy
- The personal cost to people in the independent sector
- The relationship of All Conference organisations to the rest of the sector
- The longevity and fragility of All Conference organisations.

The Precarious Material Situation of All Conference ARIs and Publications

The interviewees from All Conference noted that their organisations receive small amounts of funding, and that the ongoing presence of this income is not guaranteed. Galleries and publications can lose funding at relatively short notice, which makes meeting ongoing financial obligations, such as paying rent, tricky to sustain.

Chantelle Mitchell (SEVENTH): I think a lot of us are facing the same pressures: pressures of space and finances, maintaining physical locations connected to our identities, etc.

Stacy Jewell (KINGS Artist-Run): We are now month to month, so I wouldn't say we were

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in a precarious position, but we've been month to month the whole time I've been here, for two years.

Additionally, the recent cuts to arts funding have affected organisations within All Conference.

Rachael Haynes (Boxcopy): There's been some really drastic cuts in funding across youth arts organisations, across a whole range of the small-to-medium sector, which has been really devastating. I don't think our memory is that short. These organisations have had to just finish, and I think people don't really understand yet the long-term impact of that on the sector.

Despite these pressures, All Conference galleries and publications manage to do a lot with a small amount of funding. They are very efficient and 'punch above their weight'. It was often mentioned that with only a small amount of extra funding, these organisations would be able to do a lot more.

Laura McLean (Runway): We made a website, a curated website that brought on board different artists and academics, artworks and texts. We invited a bunch of them to come for a big symposium [...] I wrote a catalogue essay for that, which ended up being published by MIT Press earlier this year.

Chantelle Mitchell (SEVENTH): We want to do everything. And we really do, it's really exciting and we feel like we're in a place with our Board at the moment where we're all so engaged and passionate. But the undercurrent is being strategic and conservative and making sure that

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everything we put our time and energy and limited finances into are things that benefit our community, both in terms of our visitors and our exhibiting artists as well.

Rachael Haynes (Boxcopy): I don't really think people understand how these kinds of spaces keep going, what's involved and how to actually support them. So, we're asking for very small amounts of money.

Interviewees were cognisant of the fact that this funding shortage creates problems and unsustainable pressures over time. An example of this is the sector's colossal reliance on volunteer labour. Many interviewees comment on problems with this.

Anita Spooner (SEVENTH): Everyone who works with SEVENTH at the moment, with the exception of Chantelle and I, are volunteers. We are working towards addressing that as it's problematic in many ways.

Sarah Gory (un Projects): For many years we were volunteer-run, in the sense that the editors and writers have always been paid, but there were no ongoing staff members. So, it's been a Board, a volunteer Board of course, and they run the logistics of it.

When galleries and publications do obtain a grant, what is prioritised is paying artists and staff. This is sometimes done at the expense of reinvesting in the organisations.

Anita Spooner (SEVENTH): We recently received funding from Creative Victoria to support our annual program, which is really exciting. So, for the first time ever,

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SEVENTH will be able to pay artists for a show, which is really exciting and a milestone that we've been working towards for a while. It unfortunately won't leave us in a situation where we'll have a lot of reserves. We're going to come out of this annual calendar in the same position we were in before.

The interviewees stated that being vociferous and transparent about these funding problems is a priority for them, asserting that silence about funding was not a strategy they wanted to pursue. This is because they are conscious that these funding pressures are a systemic issue across the sector, not a unique situation experienced by each gallery or publication alone.

Chantelle Mitchell (SEVENTH): I think there's so much power in talking about finances and money [...] The people who are in a position to not talk about money are obscuring the fact that they have a lot of resources. Whereas at SEVENTH we want to be transparent because it gives power not only to us but to other artists spaces too, to know exactly what's going on and what we're all dealing with.

Jon Butt (c3 Contemporary Art Space): I'm humbled in one sense and often when we come to these places like, 'oh yeah we get paid and we're a bit secretive about it,' but what I've learnt is that we should be championing these ideals.

The precarious nature of the funding situation affects the ability of All Conference organisations to plan and limits their ambitions. Interviewees often mention potential future projects and strategic directions, many of which could have desirable outcomes. un Projects'

Sarah Gory, for instance, talked about the possibility of initiating a program of mentorships dedicated to fostering writing by Indigenous arts writers. Funding limitations and uncertainties were cited as obstacles to the realisations of these plans and projects.

Sarah Gory (un Projects): I think it would be a good thing if one could grow the development aspect a little bit more, which is very hard to do without funding and staffing. For instance, I had a long conversation with a Masters student at VCA the other day, an Indigenous student. He was telling me English is not his first language. He grew up in remote New South Wales, and we are looking at things like the ways we can support contemporary Indigenous writers.

Laura McLean (Runway): We have to always turn down our ambition because we don't have the time capacity to realize some things that we'd like to do [...] If we had a paid staff member I think it would add stability to the organisation, prevent burnout from doing some of the work—some of the more tedious things that need to just be maintained and watched but people don't necessarily feel excited by or rewarded by—and open up time and space for more creative things to be done by the volunteer Board members.

Stacy Jewell (KINGS Artist-Run): Even now with shorter or longer organisational funding, it's always in a four-year bracket.

One exception to this general situation of precarity is that of c3 Contemporary Art Space. Director Jon

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Butt acknowledged that c3 is in the relatively luxurious position of being able to plan for the future due to the gallery being part of the organisational structure of the Abbotsford Convent.

Jon Butt (c3 Contemporary Art Space): It's an incredibly privileged position to be in because we can plan long-term, we can slow down and think about what we're doing, we can build relationships over time [...] We can look into the future, rather than be this act of desperation, like, 'is this going to run out because we're going to get kicked out.'

These funding problems have an asymmetrical relationship in terms of what regions they impact—they have a larger effect in places with smaller arts scenes, like Brisbane, rather than Melbourne or Sydney.

Rachael Haynes (Boxcopy): I think there's just this lip service paid to ARIs and what they do but then there's still always this gap between what happens if you continue to not support them. Will they actually dry up? There is actually a limit to how these things keep going. So that's true across all levels of funding. And that's what happened more recently in Queensland, certainly over the last four or five years. That funding has not come back.

The funding shortages limit access, in terms of who can afford to exhibit in All Conference galleries. A standard practice is for independent galleries to cover their rent by having artists pay for their own exhibition spaces. Some galleries, for example SEVENTH, have come up with other funding models in order to reduce the financial burden on exhibiting artists.

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Lucie McIntosh (Blindside): Often artists are required to pay for shows and that's an application process and that means that certain people get excluded from having access to the space.

Despite the dire funding situation and its associated pressures, the tone of many interviewees was one of relentless positivity and optimism, as if they were concerned to not be seen to whinge or complain. Many, for example, reflected at length on the precarious situation of their institution and then, in an apparent non-sequitur, described this as an 'exciting opportunity.'

Chantelle Mitchell (SEVENTH): I think it's an exciting time that's borne out of these increasing pressures [...] I was having a conversation with someone from Constance ARI in Hobart about how excited they are to have a model that's not based on having a physical location and how that plays with their programming and their identity. It seems very exciting.

Remarks About the Structure of these Organisations

Generally, these organisations have a high degree of independence and aren't attached to larger umbrella organisations, such as universities. Retaining this independence was described as an important goal for many interviewees. Almost all of the organisations within the All Conference are incorporated entities.

Sarah Gory (un Projects): I know that we do always carefully consider potential partnerships with large organisations, why un should or would do that. Certainly, when there

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was talk of having *un Magazine* published through a university a few years ago, that was something the Board did not want, because it would have compromised our independence. Our independence is important to our ability to support the sector.

Anita Spooner (SEVENTH): SEVENTH is an incorporated entity but it's not a registered charity. That's a long-term goal that we're working towards, possibly in the not too distant future.

In terms of governance, All Conference organisations have boards and committees and varying degrees of formalised structure. Many made observations about the turnover rates on their Boards. Membership of Boards was also remarked to include a high number of practising artists.

Stacy Jewell (KINGS Artist-Run): KINGS' Board members would be somewhere between six and twelve, depending. There's no structure in regards to how long they can really stay on, how much work they decide to put in. It all comes down to enthusiasm and a want to put that time and effort in.

Laura McLean (Runway): For the first time since I've been on the Board, we've created quite reasonably detailed position descriptions which we've put separately in PDFs, which hopefully doesn't scare people away from taking those positions because they are volunteer positions, but just to make sure they know what they're stepping into, so they have a clear idea. We don't want people to come on board and be like, 'This is too much. I thought it

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would just be like chatting about art and publishing stuff. It is work.

Sarah Gory (un Projects): I guess some of the more recent appointments to the Board have been looking at things like forming some institutional knowledge around fundraising and around contemporary Indigenous art [...] There's been discussions around making sure that we have young people on our Board.

Chantelle Mitchell (SEVENTH): The majority [of the committee] are still practising artists. Anita and I don't necessarily have traditional arts practices and our treasurer, Sophie, who used to be the gallery manager, doesn't have an arts practice, but other than that it's pretty much all artists. Obviously, it's artists who work with organisations and those sorts of arts worker, project-managing, curating kinds of roles, but definitely I think that's a really important part of being an exhibition liaison, as well, being able to talk to another artist and create those kinds of networks with other artists.

These organisations are heavily reliant on volunteer labour. Many but not all of them have one or two staff members who are paid, though this is often only part-time, perhaps as little as one day a week, and may be shared between a number of staff members. The publications pay their writers and contributors. But all the rest of the work—liaising with artists, the Board, planning projects, etc.—is done by volunteers.

Sarah Gory (un Projects): Then we had funding through the Australia Council, and that's what allowed my position, which is the title

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of General Manager. But being the only paid position, I more or less do everything that needs to be done.

Each interviewee had a clear and strong articulation of their organisation's mission and values. The central part of this was a focus on supporting independent artistic practice and critical dialogue around the arts, outside of commercial imperatives. Providing representation and voices for marginalised groups was also named as an objective by some interviewees. It was noted that the ARIs were originally founded in response to gaps identified in the art sector.

Laura McLean (Runway): The aims and objectives of The Invisible Inc. are to operate as an art run initiative to foster and support Australian artists and visual art writers to launch, support and promote a range of initiatives and projects, to create alternative formats to the gallery space, the presentation of new work, which I think we're really starting to now as an online platform.

Sarah Gory (un Projects): The mission has stayed the same, which is to generate creative and critical dialogue around independent contemporary arts.

Lucie McIntosh (BLINDSIDE): **BLINDSIDE** was very grassroots when it started. It was started by some artists who were graduates who wanted to make a space to show their work and other work that wasn't necessarily commercial work. It was about making space and that is still part of our core values today as an organisation.

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Laura McLean (Runway): I think part of our having worked with Create New South Wales and being very KPI-conditioned now, the idea being to meet various KPIs as far as representation and other issues goes, is important to all of us, and it's required by our funders to a certain extent, but there's also those who want to hit for our own ethics, our own desires, our own politics

Laura McLean (Runway): We want to make sure we have more representation of Indigenous artists and writers and editors [...] make sure we're representing LGBTQI+. I think we do reasonably well on these so far, but just being aware of who's been given a voice and who's been supported.

When talking about the history of these institutions, interviewees often reflected that the forms the organisations have taken have shifted and mutated over the years. SEVENTH, for instance, has rented out the portion of its premises with a shop-front to a retail space. Publications within All Conference have increasingly moved online. Over long periods of time, institutions within All Conference have been responsive, adaptable and innovative.

Chantelle Mitchell (SEVENTH): Losing our street frontage on Gertrude Street [...] For so long we relied on people wandering in.

Laura McLean (Runway): We've launched conversations recently. It's like our quick response platform. We had the idea last year. It took a while to get up and running, and now it's coming along. It needs a public launch so that people are more aware of it. It's published basically once a week. It's

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been really nice to be able to be responsive, whereas the format in the magazine has been to do three issues a year [...] the conversation stuff is quick and fast and responding immediately to what's happening.

Often these adaptive responses are borne out of necessity: they are creative responses to the exigencies of unreliable funding. This could be described as making the best of a bad situation. SEVENTH's loss of its street frontage, for instance, has necessitated consideration of other forms of accessibility, for example in the digital space. The organisations' shifts in form haven't always been made out of purely 'positive' motivations, however often they are, in part, a survival strategy, with versatility and diversification imposed by financial shortfalls.

Anita Spooner (SEVENTH): Access is something that we sacrificed when we gave up our street-facing space. Now only one of our galleries is accessible. We would like to move more of our operations online.

The success stories, conversely, tend to involve an organisation reaching a point where they can operate with a longer term focus and realise more ambitious goals. Sometimes this is reached through securing ongoing funding through a commercial arrangement with a retail space, as in the case of SEVENTH. Sometimes it takes place through a hybrid model like c3, where the support of a foundation protects the gallery from the vicissitudes of the rental market.

Anita Spooner (SEVENTH): I would say there are goals that we're fortunate to be able to address now that we're in a better financial situation than we have been previously, which is to better support and present underrepresented artists, which is one way

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of saying diverse artists or artists from disadvantaged backgrounds.

Jon Butt (c3 Contemporary Art Space): Rather than the traditional model of an ARI where you are at the beck and call of the rental market and the forces of gentrification and this idea about the labour force being this volunteer labour force which is really ripe for self-exploitation—I mean, it's often self-driven, we often work ridiculously stupid hours because we believe in a project [...] The model we were looking at with c3 was to have that curatorial and that committee and collective mindset but also to have the support of a foundation around us that would protect us from the forces of gentrification.

Remarks on Professionalisation and Bureaucracy

Many of the interviewees have experience working in larger organisations (for example local councils) and so are in a position to make comparisons between what is possible within a larger organisation and an ARI or small arts publication. There is ambivalence about professionalisation. Many interviewees had positive reflections on responsiveness and quick turnaround that is afforded to ARIs by virtue of their small staff and lack of professionalisation.

Chantelle Mitchell (SEVENTH): As an arts worker who's used to having direction and very strict parameters, the freedom here at SEVENTH and the malleability of the space is really unique and exciting and dynamic.

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Sarah Gory (un Projects): I did a little bit of work with Brisbane City Council, and I just found the bureaucracy exhausting, the fight to get projects up.

Sarah Gory (un Projects): In February we decided to put 'x' amount of funding towards un Extended, a new digital publishing platform, and I think we were editing in April, and published by May. You can't do that in larger bureaucracies. That said, sometimes I do dream about working in a large organisation where I don't do everything, or I can take six days off and the work still gets done.

Chantelle Mitchell (SEVENTH): Anita and I have both worked in larger organisations, probably more professionalised and bureaucratic organisations as well, and something I'm always remarking to Anita about this role and probably the biggest thing I've learnt in the last six months, is that if something needs to be done or if I have a feeling about something or I find that something's not working so well, it's us who has the power to make that change and to address it and think through it and respond to it.

On the other hand, some spoke about professionalisation as a process that the organisation is undergoing in order to be more sustainable, both financially and in order to retain institutional knowledge.

Sarah Gory (un Projects): I think that a lot of small organisations that are under-funded, that kind of action comes from individuals, which is a completely unsustainable model. It also plays against some of the institutional knowledge things that we were talking about earlier.

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Stacy Jewell (KINGS Artist-Run): You have this pressure to professionalise in a way that we might not necessarily want to.

Georgia Hutchinson: Where is the pressure coming from?

Stacy Jewell (KINGS Artist-Run): The need for sustainability.

Anita Spooner (SEVENTH): If we were able to professionalise we might be able to compensate our arts workers and Board and everyone who contributes to the running of this space. So that's something we're constantly negotiating and working out what our priorities are because we'd like to do everything, but we also want to protect our independence.

Sarah Gory (un Projects): A lot of the models are such that they have intentionally high turnover, to aid professional development, keep things embedded, connected and relevant. But it means you wouldn't have somebody who's been on the board for fourteen years and has invaluable organisational knowledge.

Personal Cost to People in the Sector

Throughout the interviews, there were frequent references made to the staff members of the galleries and publications experiencing burnout. Working in these spaces involves devoting an extraordinary number of unpaid hours to realising projects.

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Laura McLean (Runway): Me stepping off as Chair is because I've been on the Board for two years and, like I was saying in the meeting, I'm pretty burnt out.

Jon Butt (c3 Contemporary Art Space): For the first five or six years I did everything myself, which wasn't sustainable and caused lots of burnout [...] I've lost count of how many times I've burnt out in that space.

Relationship of All Conference Organisations to the Rest of the Sector

The ARIs and arts publications are very interconnected with the rest of the sector, as well as with larger organisations. The connections and networks between organisations are rich.

Rachael Haynes (Boxcopy): The good thing about Queensland as a context is that as a comparatively small community, you can connect a lot sideways and up and down. As an organisation, there's opportunities to connect in. And that's something that other people have observed as well. So we have interstate people come up and work with us and they really appreciate that sense of strong community that Boxcopy has, that people who work at our state institutions, GOMA or at the IMA or across all levels of institutions, there's this support, this supportive network, there's engagement, there's dialogue that happens, there's partnerships that happen really freely across those spaces.

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Often the people working in All Conference organisations have worked in other places in the sector as well.

Rachael Haynes (Boxcopy): I just volunteered in a whole range of different kinds of spaces, in publishing, in advocacy organisations. I've been on Boards and selection committees for different institutions of different sizes as well.

Anita Spooner (SEVENTH): Most of SEVENTH's Board also work with other artist run spaces and galleries.

All Conference organisations make projects happen that build connections with the rest of the sector. Larger institutions often then draw on the experimentation and new work that is supported by ARIs and All Conference publications. Often interviewees remarked that their comparatively smaller organisations need to be careful that collaborations with larger contemporary art galleries and institutions don't result in a situation in which the grassroots cultural work and creativity initiated by the smaller organisations is exploited by the larger institutions, with a promise that the larger institution will pay the smaller by means of 'exposure' or increased reputation.

Sarah Gory (un Projects): un does have a complex relationship with larger organisations, particularly, say, major galleries. I think ideally we would like to work with independent galleries and spaces, but there's a recognition that for sustainability and growth, we do need to engage with some large organisations.

The publications, in particular, see the facilitation of critical dialogue about the independent art sector as a key part of their mission. They are also interested in

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documenting artworks and the history of the art scene, as part of the creation of a legacy that can be reflected upon by future generations of artists, critics and historians.

Sarah Gory (un Projects): I think we also see ourselves as kind of creating documentation, a bit of a legacy of the independent sector.

Sarah Gory (un Projects): un is a bit of a kind of incubator, or cuts across and sees itself as a supporter of ... not supporter, that's a little paternalistic almost, but part of our role is to generate dialogue that cuts across a lot of these different spaces and organisations.

The ARIs describe supporting emerging artists as an important part of what they do.

Lucie McIntosh (BLINDSIDE): The show we're sitting amongst right now, *Debut* [...] it's a program that BLINDSIDE's been running the whole time we've existed and it's basically a curated program of artists straight out of university.

Sarah Gory (un Projects): As a publisher within visual arts, especially with the focus on independent spaces, I guess we see our role as a kind of incubator. Certainly, we give a lot of emerging art critics their first publication. Likewise, we might give an emerging artist their first review.

Anita Spooner (SEVENTH): SEVENTH's particular place in the broader arts ecology, what differentiates us perhaps, is our specific focus on supporting emerging artists and presenting emerging arts practice [...]

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Professional development is something we take seriously, we have dedicated exhibition liaisons who work with all our artists and develop all their concepts and logistics and problem solving in the lead-up to their exhibitions and support them like that.

Anita Spooner (SEVENTH): Something unique about SEVENTH is that a lot of artists have their very first solo exhibitions here.

But many also stress that ARIs do not only have supporting emerging artists as their focus. They also provide spaces in which established artists and writers can experiment. In this sense, they reject the ‘stepping stone’ model of the gallery or exhibition system, in which it is imagined that the career trajectory of an artist begins with showing work in a group show at an ARI, followed by a solo show at an ARI, then a group show in a larger gallery, then either commercial representation or acquisition by a major museum. Most stress that well-established artists frequently show work in ARIs as this provides them with a space in which they can experiment.

Laura McLean (Runway): There’s still artists and writers we publish in *Runway* who also publish in more commercial publications, or for-profit publications, or more academic publications, however you want to phrase it, that use *Runway* as a way to cut loose a little bit.

Sarah Gory (un Projects): The stepping stone idea kind of insinuates that the smaller places, [...] purpose in the sector is just to kind of educate and offer experience, so people can keep moving up. Which is not the case at all. Obviously, they provide incredible cultural value in and of themselves.

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Chantelle Mitchell (SEVENTH): SEVENTH is a space where most artists have their first solo show—but it doesn't necessarily go 'artist run space [group show], solo show in artist run space, curated into group shows, get picked up by a commercial gallery, get museum representation, you're a superstar.' I think it's a far richer jigsaw, diverse, tangled web of practice.

Each organisation often has loyalty towards or a focus on particular cities or states depending on where their funding comes from.

Laura McLean (Runway): I think we stay pretty faithful to that constitution as well because as far as Sydney goes, it's always been a Sydney-based magazine, although we try as much as possible to be national, but currently one hundred percent of our funding comes from Create New South Wales, so we have certain boxes to tick as far as doing things for New South Wales-based artists and writers.

Rachael Haynes (Boxcopy): There's also a strong sense that graduates will leave Brisbane pretty quickly if they can. So, for those of us who've been in Brisbane long-term, it's about how do we keep building and supporting emerging practices, early-career practices, and also artists who want to stay and work here, to keep driving their practice the way they want to and to have spaces for experimentation. So that's been one of the challenges.

Longevity and Fragility of
All Conference Organisations

Many of the organisations within All Conference have been around for a long time—ten, eighteen, twenty years. Firstdraft is thirty! So despite their ‘improvised’, experimental beginnings, they have become established institutions.

Anita Spooner (SEVENTH): SEVENTH was initiated by Jon Butt in the year 2000.

Sarah Gory (un Projects): Yeah, so un is about fourteen years old—2004, so not quite, thirteen years old.

Georgia Hutchinson: So you mentioned nobody owns **KINGS**, and it’s this collective base, which has been around for thirteen years.

Jeremy Eaton (KINGS Artist-Run): Fourteen.

Many interviewees spoke of their sense of stewardship and responsibility for keeping these organisations going and relevant. Interviewees had a sense of their organisations’ fragility, noting how the need to experiment and change things within these ARIs and publications must be balanced with a concern that the organisations be preserved.

Sarah Gory (un Projects): Now we have started publishing our online reviews. For instance, we’re publishing four reviews a month online, which is significantly more than we would have usually published in print—about five in each issue, so ten a year. We’re no longer publishing reviews in our magazine. It is a bit of growth, but also it’s just changing formats.

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I guess for the purpose we serve, I'm not sure what massive growth would do, or at least growth without a lot of care and consideration.

Chantelle Mitchell (SEVENTH): SEVENTH has been around for a very long time. When it gets to the point where we hand over the reins, we want to hand it over in the best possible condition so that it can sustain what it does.

Discussion

Synthesising the quantitative and qualitative findings yields four main conclusions about All Conference member organisations:

- They are *highly productive*, supporting very high levels of cultural output
- They are committed to cultural values of *independence, innovation and artistic practice*
- Precarious funding means they face *severe structural challenges*
- They are *nimble, adaptive and optimistic* in response.

High Productivity

Firstly, All Conference member organisations are extraordinarily productive. They support very high levels of cultural output, namely large numbers of artists and new works. Their total aggregate audience of nearly 100,000 is also surprisingly large. The All Conference member organisations punch above their weight. Not only do they produce very high levels of cultural output, but they do so with less funding than any other part of the sector. All Conference organisations are highly innovative. This innovation is quantifiable, with 1526 new works exhibited in 2016, but it is also a strong finding of the qualitative research in which interviewees repeatedly stressed the experimental and innovative focus of their public programs.

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Commitment to Independence, Innovation and Artistic Practice

Secondly, All Conference member organisations have strong ethical foundations and value their independence and innovation as an integral aspect of their operations. All Conference member organisations are wary of partnerships with larger organisations, perhaps because they have been exploited to their detriment in the past. All of the organisations interviewed placed a very high priority on cultural and artistic values, and in particular the support of participating artists. Each interviewee had a clear and strong articulation of their organisation's mission and values. The central part of this was a focus on supporting independent artistic practice and critical dialogue around the arts, outside of commercial imperatives. These organisations explicitly describe themselves as artistic incubators and as providers of opportunities for professional development and experimentation. Although they support many young and emerging artists, they also work with large numbers of mid-career and established artists who value the opportunity they provide to work outside the constraints of large public galleries or commercial relationships.

Precarious Funding Presents Severe Structural Challenges

Thirdly, All Conference member organisations face severe, ongoing structural challenges. Their organisational existence is precarious and they face genuine material constraints on their activity. The precarious nature of their funding situation impacts the ability of All Conference member organisations to plan, and limits their ambitions. Most rely heavily on volunteer labour and none is able to fully and appropriately remunerate all the workers and artists involved. The funding shortfall also limits access, in

terms of who can afford to exhibit in All Conference galleries. This precarity extracts very real costs on the lives of the artworkers who run these institutions, who find the day-to-day struggle to keep these spaces going onerous and personally exhausting. Many interviewees cited burnout as an inherent feature of their working lives. This leads to constant staff turnover and can also pose safety and mental health risks to artworkers.

Nimble, Adaptive and Optimistic Responses

Finally, All Conference member organisations are nimble and responsive in the face of these challenges, adapting to their harsh environment by clever improvisation, by building fertile cross-sector networks and by sheer hard work. In doing so, they have built lasting institutions that are in several cases more than a decade old. The All Conference member organisations are assiduous in building networks across the visual arts and broader cultural sectors. They make projects happen that build connections with and create value for the rest of the sector. Larger institutions often then draw on the experimentation and new work that is supported by ARIs and All Conference publications. Despite the difficult funding situation and its associated pressures, the tone of many interviewees was one of relentless positivity and optimism.

In summary, the All Conference member organisations produce very high levels of cultural value, contributing to the cultural and social wellbeing of Australia in multiple and diverse ways. They are punching above their weight in terms of output, while retaining principled and effective commitments to their core missions of supporting young and emerging artists, new work and innovative artistic practice. They are remarkable success stories.

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Recommendations

It would be tempting to answer the question of policy recommendations for All Conference member organisations simply by saying they should be given more funding.

Sadly, it is not as simple as that. As many of the All Conference members themselves realise, more public funding will inevitably come with extra accountability provisions and may require them to give up some of the independence and agility that makes them so valuable for artists and the artistic community.

Of course, the ARI sector *is* under-funded, and more public subsidy would be an extremely efficient use of the existing arts funding budget. Given the exceptional levels of cultural value these organisations produce, there is a strong argument for re-prioritising scarce public funding away from less efficient parts of the sector, such as the major capital city art galleries, and towards the far more productive and innovative sub-sector exemplified by the All Conference ARIs.

While more funding is necessary, it is not sufficient. The ARI sector would benefit greatly from an holistic industry policy that sought to address current deficiencies and shortcomings. These include: a lack of affordable commercial space for art in capital cities; high overheads imposed by government red tape and regulation (for instance, local planning laws and requirements for public liability insurance); the systemic structural difficulties faced by smaller organisations when it comes to accessing philanthropy and sponsorship; the lack of professional development and management opportunities for artswokers; and the often unprincipled behavior of larger commercial (and even public) cultural institutions when dealing with ARIs.

The relatively low level of philanthropic and sponsorship income available to the sector remains both a pressing challenge and a possible future opportunity.

Existing federal and state policy initiatives that seek to leverage private sector philanthropy and web-based micro-philanthropy, such as the federal body Creative Partnerships Australia, have historically concentrated on large cultural organisations. One possible policy reform could involve a specific intervention by Creative Partnerships Australia targeted at encouraging giving to the ARI sector.

In other cultural sectors, such as the contemporary music sector, market failures and deficiencies have begun to be recognised and addressed by specific industry policies. In Victoria, for instance, the state government implemented a comprehensive contemporary music industry policy in 2014 (Creative Victoria, 2019) that included support for small venues and record labels, professional development programs for music managers and curators, regulatory relief from onerous red tape imposts and funding for musicians in the small-scale and independent end of the sector.

A similar though much smaller suite of measures was implemented for the national visual arts sector after the Myer Review in 2002, which became the Visual Arts and Craft Strategy (VACS). The VACS remains an important measure that has been demonstrably successful in supporting contemporary art organisations. However, the policy recommendations it was based on are now sixteen years old, and over time the effect of other funding decisions have eroded the (already relatively small) support for ARIs and independent artists. The VACS has not been publicly evaluated since 2010 (Australia Council, 2010). The VACS is also a funding round that is not open to all organisations, with potential applicants requiring an invitation from the Australia Council for the Arts.

One policy intervention would therefore be to update and expand the VACS, specifically prioritising the small-to-medium and ARI sector. Specific policy measures could include:

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- Dedicated four-year operational funding for All Conference member organisations and other ARIs
- Expanded program grants for ARIs and for independent artists, craft practitioners, curators, art writers and critics
- Industry skills and mentorship programs to assist managers and directors of ARIs
- A dedicated sponsorship and philanthropy officer working with the ARI sector and seconded to Creative Partnerships Australia
- International pathways programs for ARIs to network globally and access export markets
- A national federal-state agenda for ARIs, similar to the national live music action plan developed by the Live Music Office (Live Music Office, 2018); a good model to emulate could be the Music Action Toolkit developed by the Municipal Association of Victoria for Victorian local governments (Municipal Association of Victoria, 2018).

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