Craft in an Age of Change

Crafts Council
Creative Scotland
Arts Council of Wales
Craft Northern Ireland

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Contents

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Foreword

Craft in an Age of Change is a major survey of contemporary craft at the beginning of the second decade of the 21st century. It examines the place of craft in the creative economy and the working patterns of makers and other craft professionals. It also looks at a number of increasingly prominent issues, including the value of craft skills and knowledge in an economy where skills are high on the agenda; the impact of digital technology on a sector where 'hand-made' might be seen as a *de facto* requirement; the increasing need for environmental sensitivity; and the revaluing of the different facets of professional lives in answer to the 21st century move towards portfolio careers.

While it builds on previous surveys conducted at intervals over the past two decades, *Craft in an Age of Change* marks two very significant 'firsts' for surveys of the contemporary craft sector in the UK. It is the first survey to be conducted simultaneously in England, Wales, Scotland and Northern Ireland, building a truly UK-wide profile and, at the same time, allowing national similarities and differences to be clearly seen. Although it focuses on the makers at the heart of all craft practice, it also differs from previous surveys in looking at the curators, gallery owners, retailers, academics, educators and writers who all play vital roles in shaping the current and future nature of the craft sector.

Commissioned from BOP Consulting by four partners – the Crafts Council, Creative Scotland, the Arts Council of Wales and Craft Northern Ireland – the survey provides a wealth of information and statistics. It demonstrates that craft continues to develop and evolve in response to the world around it, reacting to economic, cultural, technological and social changes as they unfold, while retaining its core values and purpose.

Up-to-date knowledge and robust data is crucial for informing policy to support the craft sector, and we trust that policy-makers, funders, trade organisations and the media, as well as craft professionals, will find the report equally useful.

We thank the makers and craft professionals who participated in the survey underpinning this report for giving their time and goodwill.

Rosy Greenlees, Executive Director, Crafts Council

Andrew Dixon, Chief Executive, Creative Scotland

Nick Capaldi, Chief Executive, Arts Council of Wales

Joe Kelly, Director, Craft Northern Ireland

1. Executive Summary

Early in 2011 BOP Consulting was commissioned to carry out a mapping and impact study of the contemporary craft sector. This report – *Craft in an Age of Change* – reviews the research that was conducted, and explores its findings. It examines the profile of craftspeople and their businesses, and considers the ways in which they are changing.

The research took a number of forms: a literature review, a series of focus groups, interviews with experts, meetings with a steering group, and a large phone survey of over 2,000 makers, retailers, educators and curators. The literature review and the qualitative research (focus groups and interviews) helped identify certain themes which were examined in the phone survey.

'Contemporary' craft is clearly a term that is open to different interpretations. For this reason, the survey did not attempt to impose a rigid definition of the sector based on materials used or disciplines. The approach of the research broadly follows that used in research carried out in 2004[1]: to identify people who were already on established 'craft' databases, and who therefore had self-selected themselves as crafts-people, and then to ask them if they were commercially active in 'contemporary' craft. The survey did not include hobbyists and makers of traditional or heritage craft.[2]

[1] McAuley, A. and Fillis, I. (2004) *Making it in the 21st Century: a socio-economic study of crafts activity in England and Wales, 2002 – 2003,* Crafts Council, London.
[2] The survey issued in Scotland was adjusted to make clear that makers who describe their work as 'indigenous' were to be included. Creative Scotland defines indigenous crafts as 'those which have their origins in the cultures of Scotland' – and wanted makers who are taking such practice forward and innovating to be included.

1.1 Findings of the research

The survey suggests that, in many respects, the structure of the contemporary craft sector is relatively stable. It remains dominated by small, well-established businesses. The characteristics of makers have changed relatively little since the early 2000s, although practice is shifting to reflect the new possibilities of digital technology and environmental and ethical concerns. Retailers reported that, on balance, their sales had been fairly steady over the last three years. Both retailers and makers were cautiously optimistic about the future at the time of the survey (June/July 2011).

Nevertheless, the contemporary craft sector clearly faces challenges in the years ahead. Insofar as it is possible to tell, given methodological differences between this survey and previous ones, makers' gross craft-related incomes have declined moderately of late. Sales through the majority of 'real world' selling channels have fallen, and while online sales have grown, they have done so from a low base, and have only partially compensated for losses elsewhere. There seems to have been an increase in part-time working, though such workers are earning more than part-timers in previous surveys were. Net profits remain modest (more than half of makers report making less than £5,000 a year), and a significant minority of makers feel they lack the general business skills they need to grow, especially in marketing. Although the large majority of makers have other craft-related income sources apart from designing and making objects, these are, with the exception of teaching, relatively small contributors to gross income. Craft sales remain locally focused, with limited exports.

1.2 Makers and their businesses

This section explores key characteristics of makers and their business practices. The phone survey found that:

Education levels: 61% of makers had a degree in art, craft or design, while 24% had other qualifications in these fields, such as formal apprenticeships, A levels/O levels/GCSEs or adult education. Only 15% had no craft-related qualifications.

Second careers: For half of makers (50%), craft was a second career.

Business type: 88% of makers are sole traders.

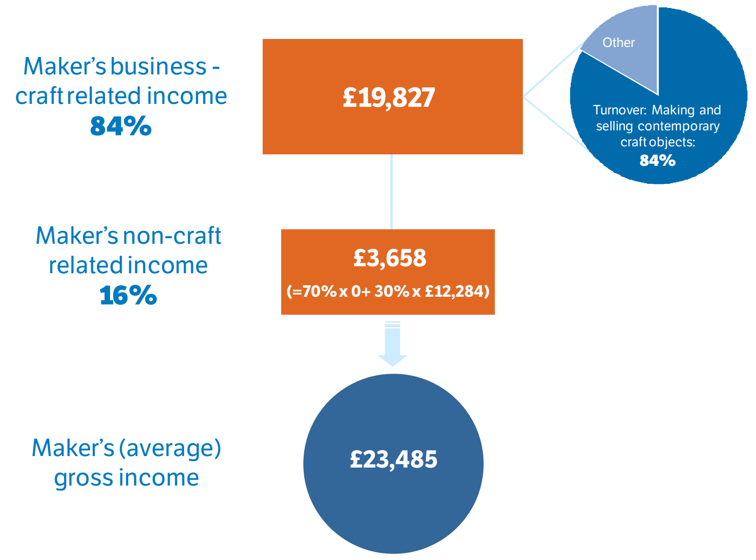
The average gross income in 2010 (adding craft-related and non craft-related income) was £23,485. (See section 4.4 for more detailed explanations around gross income.) As most makers are sole traders, the distinction between a maker as a business and as an individual is often blurred in reality. Figure 1 attempts to make the various strands of income clear. There are two elements. The first of these is the gross income from all forms of a maker's craft practice (whether that be the making of objects or another form of practice, such as consultancy). These strands are referred to in Figure 1 as the craft-related income from a maker's business.

However, many makers, as individuals, also receive income from non-craft related sources, such as part-time jobs or pensions. This is part of a craft-maker's income, and indeed may be necessary in order to support the maker's practice, but it is not directly derived from that practice. It has therefore been shown separately in Figure 1, as maker's non-craft related income. Taking the two constituents of gross income in turn:

1. Average craft-related income from was **£19,827.** This is derived from:
   - Average turnover from sales of contemporary craft objects: **£16,572**
   - Average income from other craft-related activities: **£3,255.** The largest source of such income was craft-related teaching.
2. Average income from non-craft-related activities: **£3,658.** This category includes income from sources such as non craft-related teaching, investments and pensions.

Figure 1 shows the various gross income streams for an 'average' maker. The combination of turnover from the sale of objects and income from other craft-related sources accounts for 84% of gross income, with non craft-related sources making up the remaining 16%.

Figure 1 Makers' average gross income, 2010



Source: BOP Consulting (2011)

Additionally, average net profit from all craft activities was estimated separately by makers at **£6,231. (**Part-timers made on average £3,302 profit while full-time makers made £8,308 on average.) Net profit is derived from turnover, less the costs of sales (such as the materials used in the manufacture of objects), less other costs such as energy bills, repairs and maintenance, rent and salaries of staff.

The figure for gross craft-related income (£19,827) can be compared with those for other creative occupations. A study from Cambridge and Bournemouth universities[3] found that in 2009, fine artists earned an average of £19,987 from their artistic activities, while illustrators made £21,280.

[3] Kretschmer, M *et al* (2011) *Copyright contracts and earnings of visual creators*, CIPPM, Bournemouth University, Bournemouth.

1.3 Profiles of makers

Averages can, however, conceal as much as they reveal. In order to dig below the surface a little more, BOP Consulting constructed four profiles of makers, based on their level of craft education and whether craft is their first career or not.

Box 1: Four profiles of makers
Note that these definitions are specific to this report; other writers may use these terms differently in other contexts.

Craft careerists: committed to the idea of craft as a career, they move to start their businesses shortly after finishing their first (or second) degrees in craft-related subjects.

Artisans: do not have academic degrees in the subject but nevertheless have made craft their first career.

Career changers: begin their working lives in other careers before taking up craft as a profession, often in mid-life.

Returners: makers who trained in art, craft or design, but who followed another career path before 'returning' to craft later on.

These profiles were analysed, and showed distinct differences between the four groups. 'Craft careerists' – those with a craft-related degree and who chose craft as a first career – were the largest group, accounting for 38% of makers (see Figure 2).

Figure 2 Profiles of makers

		Craft qualifications	
		First or second degree	Other or no qualification
Contemporary craft-making as a first career	Yes	'Craft careerists' (38.4%)	'Artisans' (11.7%)
	No	'Returners' (22.4%)	'Career changers' (27.5%)

Source: BOP Consulting (2011) based on 1,847 responses

The analysis suggests that the sector is in many ways being led by the craft careerists, who are younger and are earning more than the craft average, are keen to develop and use new skills, and produce work that is more likely to be exported or be bought by public collections than the other groups.

1.4 Overall size of sector

The exact size of the contemporary craft-making sector is not known. A number of factors make it hard to define, not least that many craft businesses are too small to appear in government statistics. BOP Consulting calculated its estimate of the number of contemporary craft-making businesses in 2011 by 'triangulating' the databases provided by the commissioning partners and the response rate to the surveys. (A full explanation of the calculation is given in Appendix 8.)

- Estimated number of contemporary craft-making businesses in the UK: **23,050**

It is difficult to make direct comparisons between this figure and those from other sectors, as methodologies and the basis of calculation differ. Nevertheless, there is still value in looking at estimates from public agencies of the number of professionals in other creative fields. Creative & Cultural Skills, for example, has estimated that in 2008/09 there were 28,490 visual artists and 28,545 actors, singers, musicians and other entertainers in the UK.

Multiplying the number of businesses by the average craft-related income gives **estimated total income for all contemporary craft-making businesses of £457m.** As points of comparison from other creative industries, total revenues for London West End theatres were £512m in 2010[4], while spending on music downloads in the UK was £316m[5] in the same year.

This figure for total craft-related income in the sector is lower than some previous estimates. One explanation is methodological – in the current survey, makers were asked to give a specific figure for their income, rather than indicating a band into which their income fell. This approach is likely to be more accurate than the 'band' one, but also to report lower overall totals. The greater level of part-time working recorded in this latest survey also explains a large part of the gap. This change may be driven by the tough economic climate.

BOP Consulting also prepared a calculation of **Gross Value Added** (GVA) – how much value craft-makers add by transforming their raw materials into finished products and services.[6] This was estimated at **£220m** for 2011.

[4] Figure from the Society of London Theatres, quoted in http://www.thestage.co.uk/news/newsstory.php/31087/theatreland-enjoys-golden-age-despite-ash- accessed 14 October 2011
[5] Figure from BPI Annual Yearbook 2010
[6] Details of the GVA calculation can be found in appendix 8.

Total craft-related income of makers by nation

This estimate of total income can be broken down by nation, based on the estimated number of businesses:

- England: £339m from 17,150 businesses
- Scotland: £70m from 3,350 businesses
- Wales: £28m from 1,500 businesses
- Northern Ireland: £20m from 1,050 businesses

Differences between nations (makers)

The sample sizes for makers were large enough to allow for robust results at the level of the four nations of the UK. Analysis indicated that there are few statistically significant differences between makers in the four countries, although there are small variations.

Makers in England have, on average, been in business a little longer than those in the other three countries, and are more likely to have relevant degrees. However, this does not translate into higher average turnover in England. Tourism was less important to makers in England than in the other three countries.

Makers in Scotland worked slightly longer hours than the UK average and had the highest craft-related income of the four nations (though this difference is not large enough to be statistically significant). Makers in Scotland were also more likely to be using internet selling channels than the UK average, and were also a little more optimistic about the next three years.

Makers in Wales were more likely to be male, and had the highest average age in the four nations. Wales was also the only country in which 'career changers' made up the largest group among makers – in the other three, it was 'craft careerists'. Levels of sole trading were a little lower in Wales than the UK average.

Makers in Northern Ireland were a little more likely to work away from home, and to sell through commissioning, though were less likely to do so through galleries and exhibitions and online routes than makers in the UK as a whole. Makers were also more likely than those in other nations to report having had business training since they began their professional careers.

1.5 Retailers' businesses

Craft is sold through a number of routes. Sometimes makers sell directly to the public, through craft fairs, specialist street markets or by having their work commissioned, for example. In many cases, though, craft is sold on the makers' behalf by a retailer. In order to understand this element of the craft 'value chain', 128 craft retailers from across the UK were spoken to as part of the phone survey. The retailers' database from which the interviewees were drawn included commercial galleries, sales outlets within public galleries and museums, craft shops and online retailers.

The sample of 128 is smaller than that for makers, and cannot be considered to be as statistically robust. Nevertheless, the results are indicative of the shape of the craft retail sector.

Their retail unit is typically a gallery or shop, though online selling through a business website is important for a minority. Just under half the retailers surveyed sold only contemporary craft objects (44%), while the remainder also sold other items, most usually fine art or stationery, gifts and cards. Jewellery, ceramics and textiles were the most frequently sold craft disciplines, with jewellery being the main revenue-earner for almost half of the retailers. A typical craft retail business has been in existence for just under 20 years, and employs 4.5 people.

1.6 Educators, writers and curators

The researchers also sought to speak to professionals who earn a living from craft but who do not primarily make objects, including educators, writers and curators. In all, 71 of these were interviewed, with representation from all four nations of the UK. Once again, this sample is too small to achieve the same level of statistical robustness as the makers' data, but the results can be treated as indicative.

Educators, writers and curators are in many cases pursuing portfolio careers in which their income is derived from a mix of activities primarily in craft or closely related fields (art and design).

- Most of those we spoke to (87%) taught formally, at least part of the time, usually at a higher education institution.
- Almost 20% taught informally at venues such as community centres, gallery spaces and colleges, to a wide mix of people.
- Almost 20% had income from writing about craft, typically on a freelance basis, while 11% earned income from curating.
- Almost a third of them reported earning some money from the making of contemporary craft objects, though this was not their main source of income.

1.7 Demographic profile of respondents

The demographic profile of all respondents shows that contemporary craft is in many ways a diverse profession. While the percentage of black or Asian professionals remains low, the sector is heavily female, with proportions of foreign-born and dyslexic/disabled people that are above the national averages.

- **Gender:** In all, 69% of respondents were female; 31% were male.
- **Age:** The estimated average age of respondents is 48.7 years.
- **Dyslexia and Disability:** 11.5% of respondents said they were dyslexic, 4.1% said they were disabled (excluding dyslexia). (These two groups include 0.5% who said they were both dyslexic and disabled.)
- **Ethnicity:** 81.0% said they were White British, 2.4% were White Irish, 10.0% were Other White (a category that includes many Europeans and North Americans), while 3.5% were from black, Asian, mixed and Other backgrounds.
- **Foreign-born:** Over 12% of respondents were born overseas, with the United States, Germany, South Africa, the Republic of Ireland and

India being the most frequently mentioned places of birth outside the UK.

1.8 Broader themes

The contemporary craft sector has its own particular characteristics, but it cannot be seen in isolation. As the title of this report suggests, the current age is one marked by rapid change: in economics, the environment, and in culture. The impact of these wider changes on craft was explored in the literature review and the discussions with the focus groups. From these, four themes emerged, which helped to shape the phone survey. They were:

- **How are internet and digital technologies shaping craft practice?**

Well over half (57%) of makers were using digital technology in their practice or production, with the majority of these doing so often or all the time.

Makers reported moderate declines in their main selling channels, especially gallery and exhibitions sales, and a shift towards online sales, though these were still relatively small. Around 30% of makers were selling through their own website, but only 3% were selling through social media.

- **How does the global vs local debate play out in the sector?**

The majority of makers sell to the domestic market. Over 70% of makers do not export their products; among those who do, exports account for almost 20% of turnover.

Retailers too largely serve domestic markets. A large minority of retailers sold work by overseas makers, but these made up only a small proportion of their overall sales (6%). Just under 10% of retailers' sales were to customers from outside the UK.

- **To what extent are issues of sustainability affecting practice in the sector?**

Just under a third (31%) of makers had changed their practice in the last three years in response to environmental concerns. The most popular change was to source more environmentally sustainable or sensitive materials.

- **How have recent economic changes affected the sector?**

Both makers and retailers were cautiously optimistic about the future at the time of the survey (June/July 2011). Retailers also said (on balance) that their sales had been relatively steady over the last three years.

Most makers expected to have to respond to the economic climate by changing their practice in various ways over time, predicting that they would introduce new products and make increasing use of new technology.

1.9 Conclusions

It is clear that the contemporary craft sector is likely to come under pressure from a number of directions in the coming years. This document is a research report, and does not seek to make direct policy or strategy recommendations. Nevertheless, the research has flagged up a number of questions and issues for the future, which are worth discussing in a little more depth.

- **What will the rise of digital technologies do to the concept of craft?**

Digital technology has been on a 'long march' through the creative industries, transforming business models as it goes. The music, newspaper, photography and film industries have been radically altered, and even sectors that initially seemed less likely to be affected, such as book publishing, are now changing fast. Craft too is now being touched by these developments. The unique, hand-made nature of craft objects lies at the heart of the profession, reflecting core beliefs such as the importance of authenticity and the value of workmanship. Yet if technologies such as 3D printing become ubiquitous, and it becomes possible to make distinctive objects at the touch of a button, what does that imply for the whole notion of craft? Will the boundaries between craft, fine art and design blur still further as a result? Is such a change a threat to the identity of craft or an opportunity for exchanging ideas across artistic and wider agendas? What will being a craft professional actually mean in these circumstances?

- **What will the economic effects of the 'age of austerity' be?**

The challenges that Britain's economy faces over the next few years suggest that domestic economic growth is likely to remain slow. Globally, growth is likely to be concentrated in the emerging economies. Most makers are sole traders, and most of them currently do not export. How can they be encouraged and supported to find opportunities overseas? Are there other ways in which makers can use their specialist skills, knowledge of materials and experience of innovation and product development to earn money in international markets?

Online sales represent the growth area in the domestic market, albeit from a low base, but a significant minority of makers feel they lack marketing skills (including in digital marketing). Currently many buyers prefer to physically see and touch the object before purchase. How can craft address this issue? What are the lessons from other art-forms, and can they be applied to craft? And what are the implications for commercial galleries?

The domestic market for low- and middle-end creative products of many kinds (i.e. products other than craft) has been affected for several years by imports of cheap goods of reasonable quality. The logic of globalisation and greater competition suggests that the future market for UK craft will become increasingly concentrated at the higher end, where originality and aesthetic value count for more than cost and where skills and knowledge can earn a premium. However, in tough economic times consumers may cut back on expensive and 'luxury' purchases. Is there a danger of a backlash against conspicuous consumption? How should craft position itself in such a market?

Economic problems may also affect the type of people who enter the profession. What will the effect of slow growth be on the career changers and returners? Will increasing levels of redundancy and unemployment lead more people to turn to craft as an alternative career, or will economic uncertainty make people more reluctant to take the gamble of changing direction?

Finally, will economic pressures accelerate the trend for portfolio working, as people look to capitalise on their craft skills to bring in income from a broader range of sources, or will it reduce the number of opportunities, as other sectors cut back too? Are makers in particular able to market themselves well enough to develop the profile required to take up opportunities outside the immediate craft sector?

- **What effect will changes to higher education have on craft?**

Craft has become 'professionalised' in recent years, with first and second degrees becoming a key pathway into the profession. Teaching in higher education institutions is also an important source of income for many craft professionals. Yet there have been signs for some years that this picture is changing. More specialist craft courses have closed (for reasons including cost, lack of demand, lack of space, and health and safety issues) than have opened, while there has been a notable rise in the number of interdisciplinary courses incorporating a craft element. Fees are set to rise for university students in England and there is some early (if incomplete) evidence that numbers applying for art and design courses are falling as a result (though this follows a surge in 2010). What do such changes imply for the structure of the craft sector? Will other routes into the profession – apprenticeships, or working with more experienced makers – revive, or will interdisciplinary courses and other degree paths increase in prominence?

- **What effect will budget cuts in the arts and cultural sector have?**

Craft, like many of the creative industries, has a mixed private-sector/public-sector economy. As part of the wider effort to restrain public spending, cuts have been announced to the budget of the DCMS (in England) and the departments of the devolved governments (in Scotland, Wales and Northern Ireland) which cover the arts. Local authorities too are reducing their spending on arts and culture. What will be the implications for craft, both of the likely reduction in direct spending on craft (through the purchase and commissioning of craft work by public collections) and in the arts support infrastructure on which a sizeable number of craft professionals draw? What will happen in other commissioning areas where some makers were starting to sell their services, such as healthcare?

- **Can craft respond to the growing concerns over environmental and ethical issues?**

Craft would seem, on the face of it, to be well-placed to benefit from these wider shifts in the culture. Craft-making is often imagined as a small-scale, 'authentic' form of production, rooted in natural materials, and it is true that many makers have already responded to environmental and ethical concerns. However, some of the most significant craft disciplines, such as ceramics and glass, use methods (firing, glazing) that are not environmentally friendly but which cannot readily be replaced in current practice.

Can makers, given their often limited financial resources, find ways to mitigate the potential damage such practices cause?

Closing thoughts

These questions and issues suggest contemporary craft may be facing a period of unusual turbulence: there have rarely been so many challenges on so many fronts simultaneously. However, craft has a range of factors in its favour. It uses modern thinking and technology to build on skills, knowledge and experience that have been tested over time, and speaks to deep-seated human instincts: the value of distinctiveness, a pride in quality and the worth of craftsmanship. Whatever changes may be coming, the history of the sector suggests that craft professionals will find ways to re-think and re-invent their practice to adapt to a changing world, and to allow craft to flourish.

'Traces' by Ainsley Hillard, Mission Gallery. Photo by Jason Ingram, courtesy of the artist.

2. Introduction

In recent years there has been a revival of cultural and political interest in craft. From the Craft Council's world-leading high-end craft fair, COLLECT, to the 'Craft Mafias' which have sprung up in cities such as Glasgow, Manchester and Leeds, the energy of contemporary craft is apparent. Perhaps in reaction to an ever more screen–based entertainment culture, there is a hunger for the authentic and the hand-made. Within the wider culture this is expressed in a number of ways, from Richard Sennett's and Matthew B. Crawford's well-received books on the value of working with your hands, to the V & A/Craft Council's record-breaking *Power of Making* exhibition, or the way in which big businesses such as Levis' and Camper have tried to appropriate the notion of craftwork for their own products. Political support too seems to have grown across the four nations of the UK. Ed Vaizey, the Minister for Culture, Communications and Creative Industries, went so far as to declare that 'craft was enjoying something of a *Zeitgeist* moment'.[7]

Craft has been counted as one of the 'creative industries' ever since the term was first adopted by the British government in 1998. However, the craft sector has always been difficult to measure. The Department for Culture, Media and Sport (DCMS) produces a range of economic estimates every year for the industries that fall into its remit, but is unable to supply figures for the craft sector for many of its indicators. This is due to the small size of most craft businesses and the difficulty of identifying makers through the standard industrial and occupational classifications – it is hard, for instance, to separate out 'studio' ceramics from more industrial processes. Makers also often choose to define themselves by a variety of terms, such as designer-maker or applied artist – indeed, they may use different terms depending on the client they are dealing with.[8]

In these circumstances it has largely been left to the agencies dealing with craft to conduct research into the size, value and characteristics of the sector. These bodies – the Crafts Council, Creative Scotland (the successor to the Scottish Arts Council), the Arts Council of Wales and Craft Northern Ireland – have periodically commissioned major studies into the sector. The last such series of reports was completed between 2002 and 2006. This new report is the first such one to be commissioned simultaneously by all four organisations. It focuses on contemporary craft, but attempts to look at the whole 'value chain' within that sector: not just makers but retailers, educators, curators and writers too. A number of research methods were used to do this, including a literature review, interviews with experts in craft and focus groups with makers, academics, writers and retailers. The centrepiece of the study is a large phone survey of over 2,000 makers, retailers, educators, curators and writers. In this way the study hopes to provide the fullest picture to date of Britain's contemporary craft scene.

The report also explores some of the wider issues affecting the sector. As the title of this report suggests, in the half-decade or more since the last set of major studies of the craft sector was released the world economy has seen considerable changes. Internet and digital technologies have continued their inexorable spread, disrupting established business models in industry after industry. Environmental concerns continue to grow, driven by evidence of climate change. Globalisation has opened up new markets and opportunities but has also brought new competition. Meanwhile, the credit crunch and the subsequent recession threaten to usher in a new era of austerity, in which both private and public spending is curtailed by the need to pay down debt.

These forces have had a huge impact on many of the creative industries. Music, publishing, film, TV and the newspaper business have all been radically affected by these changes. Where, though, does craft stand? Have these wider forces transformed its business models too or has its emphasis on skills, the value of the hand-made and the individuality of its products allowed it to adapt to and benefit from this new world? These questions make it a good time to examine what is happening to the sector.

[7] Vaizey, E. (2010) *Show of Hands*, GQ magazine, December 2010
[8] Schwarz, M. and Yair, K, (2010) *Making Value: craft and the economic and social contribution of makers*, Crafts Council, London.

2.1 Structure of the report

This report summarises the full set of evidence gathered in the research process. It begins with a background and context section, drawing on the literature about contemporary craft. Next are the findings of the phone survey. These have been split over three chapters. The first provides a UK-wide profile of craft professionals and their businesses, before briefly touching on similarities and differences between the four UK nations. The second chapter considers four profiles BOP Consulting has developed of 'typical' makers. It shows that there are differences between types of makers connected to their education and career choices. The third chapter reviews the evidence around four broader themes that were highlighted in the qualitative research:

- How are internet and digital technologies shaping craft practice?
- How does the global vs local debate play out in the sector?
- To what extent are issues of sustainability affecting practice in the sector?
- How have recent economic changes affected the sector?

These three 'findings' chapters are then followed by a conclusion, pulling together the main threads of the research and posing some questions to encourage further debate about the future of craft.

After the main report there is a series of appendices. The first four of these show the full survey results for makers for each nation in turn. Each appendix is prefaced by a short summary picking out some of the key indicators for each country. There are further appendices showing the full results for retailers and educators, curators and writers. These are followed by two more appendices containing a full literature review and a longer discussion of the research methodology and the calculation of the population estimate. Finally there is a list of the people who were consulted as part of the project's research.

Nora Watson. Photo by Tim Millen, courtesy of Craft Northern Ireland.

3. Background and Context

This chapter presents the researchers' understanding of the contemporary craft sector, as a basis for explaining the methodological choices made in the course of this study. The sector's key characteristics are outlined, and areas of differences in approach between this study and its predecessors are pinpointed.

The chapter draws on the full literature review (included in this report as appendix 7). Given the nature of the available literature, the review is inevitably focused on makers, although evidence relating to the wider craft sector is included where it exists.

Both this chapter and the literature review draw extensively on quantitative socio-economic surveys commissioned by the Crafts Council and the Arts Council of Wales[9], a consortium of Scottish organisations[10] and Craft Northern Ireland,[11] each conducted by McAuley and Fillis between 2002 and 2006. These studies' predecessors,[12 13] commissioned by the Crafts Council and its partners, are also examined, although differences in sector definitions and methodologies generally preclude much longitudinal analysis between these and the 2002-06 studies.

The chapter deals in turn with the definition of the sector, the understanding of practice, the economic context and the role of higher education. It concludes with a section looking at craft in a wider 'creative industries' context.

3.1 Sector definitions

Definitions of craft-making have evolved steadily since the first quantitative study of makers working in Britain, published in 1983.[14] This first report, which was limited to England and Wales, focused on makers who were thought to demonstrate 'innovation, design and aesthetic content, and technical competence,' and whose work 'occupies the ground between the Arts Council and Design Council'.

The next study, published in 1994[15] and covering Scotland as well as England and Wales, introduced a dual definition based on technical competences and materials: makers needed both to be working in a recognised material (e.g. glass, leather) and to be producing work from within a defined typology (e.g. furniture, jewellery) in order to be included. This study also introduced a focus on makers producing 'original objects ... in a commercial way' but with 'artistic control of their work' retained 'from conception to completion'. Finally, it introduced specific exclusions for makers in perishable materials (such as florists and cake decorators) and building materials (e.g. thatchers).

Unlike their predecessors, the three studies conducted between 2002 and 2006 – and respectively covering Scotland,[16] Northern Ireland,[17] and England and Wales[18] – did not seek to impose a definition of contemporary craft based on competencies or materials. Instead, they included makers on the basis of their membership of databases held by the commissioning bodies and their partners (primarily craft guilds, societies and associations). In addition, they introduced new exclusions of makers who were perceived as being not commercially active (described as 'hobbyists') or who described the 'subject or style' of their work as 'traditional'.

[9] McAuley, A. and Fillis, I (2004) *Making it in the 21st Century: a socio-economic study of crafts activity in England and Wales, 2002 – 2003,* Crafts Council, London.
[10] McAuley, A. and Fillis, I. (2002) *Crafts Businesses in Scotland: a study*, University of Stirling in partnership with Scottish Arts Council, Scottish Enterprise and Scottish Enterprise, Glasgow.
[11] McAuley, A. and Fillis, I. (2006) *A Future in the Making – socio-economic survey of the craft sector in Northern Ireland*, Craft Northern Ireland, Belfast.
[12] Bruce, A. and Filmer, P. (1983) (1983) *Working in Crafts,* Crafts Council, London..
[13] Knott, C. A. (1994) *Crafts in the 1990s. A socio-economic study of craftspeople in England, Scotland and Wales*, Crafts Council, London.

[14] Bruce, A. and Filmer, P. (1983) *Op. cit.*
[15] Knott, C. A. (1994) *Op. cit.*
[16] McAuley, A. and Fillis, I. (2002) *Op. cit.*
[17] McAuley, A. and Fillis, I. (2006) *Op. cit.*
[18] McAuley, A. and Fillis, I. (2004) *Op. cit.*

The definition of contemporary craft used in the current study is broadly comparable with its 2002 – 2006 predecessors, as explained in more detail in Appendix 7. The overall parameters of this study have, however, expanded in comparison with its predecessors. Whilst the 1983 – 2006 studies focused exclusively on makers, the current study encompasses the whole contemporary craft sector, including retailers, writers, curators and educators.

This new approach supports the commissioning bodies in recognising both the economic impact and the inter-connectedness of different parts of the craft sector. It is also consistent with what is known about how individual craft businesses work. Makers, for example, may also undertake work as educators or writers, or an arts administrator may also work as a maker.[19] [20] For many, different forms of craft-related work are connected on both commercial and creative levels – teaching, for example, is as much a creative stimulus as it is a source of income.[21] The 'whole sector' approach adopted by this study enables all craft-related aspects of people's work to be valued as part of their creative and business practice.

3.2 Understanding of practice

A second important point of difference between this study and those preceding is its understanding of makers' work, and its evolution in response to economic, social, cultural and political influences.

Literature from the past two decades demonstrates that craft practice is no longer exclusively focused on the making of objects, but also on the development of knowledge-based services. In addition to (or instead of) making, many makers apply their specialist knowledge, skills and working methods in other ways.

For some makers this means developing time-limited work for gallery exhibition, or exploring processes or systems rather than outcomes; the type of work that may result in, for example, a performance rather than an exhibited object. For other makers, it may mean developing specialist, craft-related consultancy and education services. Press and Cusworth[22] indicated that craft graduates were applying craft skills and knowledge to a range of creative and non-creative occupations. Later, Hunt *et al*[23] found individual makers developing portfolios of craft-related work, applying craft knowledge and processes to the development of consultancy and education services and intellectual property, as well as to objects.

Examples of such use of skills included makers working in architectural, interior and industrial design, in fashion, retail and advertising, and in film and television. Makers were found to complement the work of other professionals with their understanding of the dynamic between people, materials and objects, as well as with their specialist knowledge – and ability to stretch the capabilities of – materials and technical processes.

In education, Hunt *et al* found makers working in formal education settings (schools and further and higher education institutions) in both research and teaching roles.

Schwarz and Yair[24] found that makers were also working in a range of less formal education and community settings. These contract opportunities range from the delivery of community and education workshops led by regeneration agencies or children's centres to the curation of exhibitions and architectural consultancy on public building projects such as healthcare centres and schools. Because these services are contracted by local authorities and publicly funded voluntary sector organisations, cuts to public sector funding are likely to reduce demand for them in future in some parts of the UK.

[19] Schwarz, M. and Yair, K. (2010) *Op. cit.*
[20] Press, M. and Cusworth, A. (1998) *New Lives in the Making.* Art & Design Research Centre, Sheffield Hallam University, Sheffield and Crafts Council, London
[21] Schwarz, M. and Yair, K. (2010) *Op. cit.*
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[22] Press, M. and Cusworth, A. (1998) *Op. cit.*
[23] Hunt, W., Ball, L. and Pollard, E, (2010) *Crafting Futures: a study of the early careers of crafts graduates from UK higher education institutions.* Institute for Employment Studies, Brighton / University of the Arts London, London / The Crafts Council, London.
[24] Schwarz, M. and Yair, K. (2010) *Op. cit.*

Other research by Yair has focused on the contribution of makers working in this way to the wellbeing,[25] rural economy[26] and environmental sustainability[27] agendas, as well as to science, technology and engineering,[28] and the digital world.[29] In all these cases, makers were found to be undertaking a wide range of roles, and to be supplying other businesses as well as selling (both products and services) direct to the consumer.

The increasing breadth of craft practice – with making at its heart – is changing the ways in which makers connect with the marketplace. Makers are increasingly working within a mixed economy, supplying other businesses whilst marketing their own products and services, and raising funding and other finance where possible for research and development.

3.3 Economic prospects

The effects of the credit crunch and subsequent recession on the craft sector are not yet clear. It has been suggested that makers' flexibility, independence and capacity for developing multiple revenue streams from different types of business activity may offer some degree of protection from fluctuations in market demand.[30] At the same time, the dependence on a small number of routes to market – and relatively low levels of investment in continuing professional development (CPD) – reported previously by McAuley and Fillis[31] may present major challenges.

A report from Morris Hargreaves McIntyre[32] commissioned by the Crafts Council suggested there was significant untapped market potential for craft objects despite the economic downturn. It proposed reaching this market by building on the positive values consumers associate with craft, such as authenticity, craftsmanship, quality and intimacy. It also suggested specific strategies for market development, including connecting craft-specific lifestyle and cultural interests with leisure making, eliciting the hidden stories behind the craft object, and marketing craft as a more ethical alternative to luxury labels. Overall, it suggested that market potential could be optimised despite the tough economic climate, by understanding and acting on these types of consumer values and preferences in the positioning of the craft object in the marketplace.

The technology supporting craft retailing is also changing. Online sales mechanisms may not offer the tactile experience of buying from a shop, but they can supply the peer endorsement that Morris Hargreaves McIntyre showed is important to new buyers. They can also create opportunities for personalisation as well as providing the 'back story' that matters to buyers. In addition, they provide makers themselves with cost-effective access to global markets.[33]

3.4 Role of higher education

The role higher education (HE) plays in the craft sector is significant: McAuley and Fillis's work in the period 2002 – 2006 showed that a 'full-time art and design course' was the most commonly reported craft sector qualification.[34] The picture here is complex, with considerable differences across the UK nations (detailed in appendix 7) and between

[25] Yair, K. (2011) *Craft and Wellbeing.* Crafts Council, London. Online publication, accessed 07/10/2011. http://www.craftscouncil.org.uk/about-us/press-room/view/2011/craft-and-wellbeing?from=/about-us/press-room/

[26] Yair, K. (2011) *Craft and Rural Development.* Crafts Council, London. Online publication, accessed 07/10/2011. http://www.craftscouncil.org.uk/about-us/press-room/view/2011/craft-in-rural-communities?from=/about-us/press-room/

[27] Yair, K. (2010) *Craft and Environmental Sustainability.* Crafts Council, London. Online publication, accessed 07/10/2011. http://www.craftscouncil.org.uk/about-us/press-room/view/2011/craft-environmental-sustainability-201101261052-4d3ffd03de9c6?from=/about-us/press-room/

[28] Yair, K. (2011) *Crafting Capital.* Crafts Council. London. Online publication, accessed 05/12/11. http://www.craftscouncil.org.uk/files/download_iterator/8e562717f3d1a733/crafting-capital_web-version.pdf

[29] Yair, K. (2011) *Craft and the Digital World,* Crafts Council, London. Online publication, accessed 07/10/2011. http://www.craftscouncil.org.uk/about-us/press-room/view/2011/craft-the-digital-world?from=/about-us/press-room/

[30] Crafts Council (2009) *The Crafts Sector Adapts to the Credit Crunch.* Online publication, accessed 20/02/2011. http://www.craftscouncil.org.uk/professional-development/maker-development/credit-crunch-feature/crafts-sector-adapts/

[31] McAuley, A. and Fillis, I. (2004) *Op. cit.*

[32] Morris Hargreaves McIntyre (2010) *Consuming Craft: the contemporary craft market in a changing economy.* Crafts Council, London.

[33] *Ibid.*

[34] McAuley, A. and Fillis, I. (2004) *Op. cit.*

men and women, and with evidence of higher education as part of a mix of lifelong learning opportunities. However, unusually high levels of education to first degree level – compared with both the general population and the rest of the creative industries – have remained a key sector characteristic. HE now provides the primary route into the craft sector for new entrants, especially for women, who outnumber male graduates but are less likely to enter the sector through informal apprenticeships or self-directed learning.

Higher education also provides a key site for innovation in the craft sector, which is valuable given the predominance of sole traders lacking the necessary capital to invest heavily in R&D. Yair's research highlighting craft-makers' engagement with the digital[35] and environmental sustainability[36] agendas makes clear that practice-based academic research is an important source of craft-based innovation. Higher education institutions (HEIs), with their capacity to invest in specialist equipment and facilities (such as digital manufacturing labs), to nurture academic expertise and to broker cross-sector academic partnerships (with the academic scientific community and manufacturing industries, for example) have become drivers of innovation and diversification within craft practice over the past decade.

HEIs also contribute to a CPD infrastructure which extends into the public sector. McAuley and Fillis's work suggested that CPD amongst makers is often informal; although valued highly by makers, professional development appears to be more commonly sourced through networks and informal peer support than through formal training opportunities. Yet, as Schwarz and Yair found,[37] focused, time-limited CPD interventions can play transformative roles in both creative and business development; for example, by enabling the use of craft skills and knowledge to leverage the development of new services, or by establishing the focus needed to direct a portfolio career.

[35] Yair, K. (2011) *Craft and the Digital World. Op. cit.*
[36] Yair, K. (2010) *Craft and Environmental Sustainability. Op. cit.*
[37] Schwarz, M. and Yair, K. (2010) *Op cit.*

3.5 Craft and the creative industries

It is also worth explaining something of the wider 'creative industries' context in which the craft sector operates. Ever since the term was first adopted by the government (in the form of the new Department for Culture, Media and Sport) in 1998, the list of creative industries has included craft. However, the small size of craft businesses and the difficulty of identifying craftspeople through Standard Industrial or Occupational Classifications (SIC and SOC codes), means that the DCMS is not able to say much about craft in its annual Creative Industries Economic Estimates. This current research is in part an attempt to address this gap in the evidence.

The DCMS figures are calculated using a range of government statistics, such as the Inter-Departmental Business Register.[38] These figures count only businesses and employees that are on the government's 'radar', for instance for paying VAT and PAYE. Very small businesses which fall below the thresholds for such taxes may not be picked up in this data. It is useful to look at the data for some of the smaller creative industries, to put the figures reported in this study into some sort of wider context.

Business numbers

The DCMS's figures indicate that there were 182,100 enterprises in the creative industries in 2010. The following table shows selected creative industries in terms of numbers of enterprises.

[38] The DCMS collects figures for the UK or Great Britain, depending on the data sources available to it.

Figure 3 Number of enterprises by creative industry, 2010

Creative industry	
Design	14,200
Architecture	11,500
Film, Video and Photography	9.900
Publishing	7,700
TV and radio	7,700
Art and Antiques	2,700
Designer Fashion	900
Digital and Entertainment Media	200

Source: DCMS (2010)

These are businesses which appear on the government's 'radar' usually because they pay VAT. As an approximate comparison, the number of craft businesses with a turnover of more than the VAT threshold of £70,000 in 2010 can be calculated from this survey's findings and the population estimate. The survey found 4.0% of craft businesses had such a turnover, which 'translates' to approximately 920 craft-making businesses in our estimated population[39] – around the same number as designer fashion.

Gross Value Added

Another way to measure the contribution of craft is to estimate its Gross Value Added (GVA) – how much value craft-makers add by transforming their raw materials into finished products and services. BOP Consulting has calculated that the GVA for contemporary craft was £220m. (The detailed calculation can be seen in Appendix 8.)

GVA (Gross Value Added) for selected creative industries was:

Figure 4 GVA for selected creative industries, 2010

GVA for creative industries	
Film, Video and Photography	£2,700m
Art and Antiques	£300m
Designer Fashion	£100m
Digital and Entertainment Media	£200m

Source: DCMS (2010)

'St Machars' woven by Douglas Grierson, David Cochrane and Naomi Robertson. Photo courtesy of Dovecot Studios.

[39] Such businesses would be counted under 'non-craft' classifications in current government statistics.

4. Findings: demographic and business structure

The aim of this project is to understand the full range of activity in the contemporary craft sector, and its economic impacts. As such, the process was not simply confined to studying makers – other aspects of the craft 'business', such as retailing and curation were also to be explored. This contemporary craft mapping study is also the first major one to be carried out simultaneously across England, Scotland, Wales and Northern Ireland.

The centrepiece of the study is a phone survey of just over 2,000 makers, retailers and educators/curators/writers. This provides the quantitative 'core' of this report, which is discussed in the next three chapters and in the individual analyses by nation, shown in appendices 1 to 4. The sheer number of questions asked in the survey means that not all the responses are discussed here – the full set is shown in the appendices.

A full explanation of the methodology can be found in appendix 8.

4.1 Presentation of the findings

In all, 2,046 interviews were carried out as part of the phone survey. The findings for makers are more statistically robust than those for the other categories due to their larger sample sizes.

Although 1,847 responses were collected from makers from across the UK, simply combining all these results to obtain a UK figure would place too much weight on the findings from the smaller UK nations at the expense of England. The makers' results for the UK as a whole have therefore been weighted by nation using the estimate of 23,050 contemporary craft-making businesses calculated in appendix 8. The results for each nation are shown separately in appendices 1 to 4.

The number of responses from retailers and educators, writers and curators was smaller, and has not been weighted. They do, however, include responses from all four nations of the UK.

In addition to collating and presenting the findings of the questionnaire, BOP Consulting has also used a statistical analysis method known as regression analysis to provide richer detail on the relationship between variables (such as gender, age, materials used, and turnover). This technique allows us to identify which factors have a significant effect on the results, by 'controlling' for the effects of other variables. To give a theoretical example: men may report higher turnover than women, but also report being more likely to work with ceramics than textiles. Regression analysis helps us understand whether gender is really responsible for the difference in turnover, or whether it is women's greater likelihood of being textile-makers that is the driver (i.e. do ceramicists of either gender have higher turnovers than textile makers).

This first chapter of findings gives a detailed profile of craftspeople and their businesses, before concluding with a brief discussion of the similarities and differences between makers in the four nations of the UK.

4.2 Demographic profile of respondents

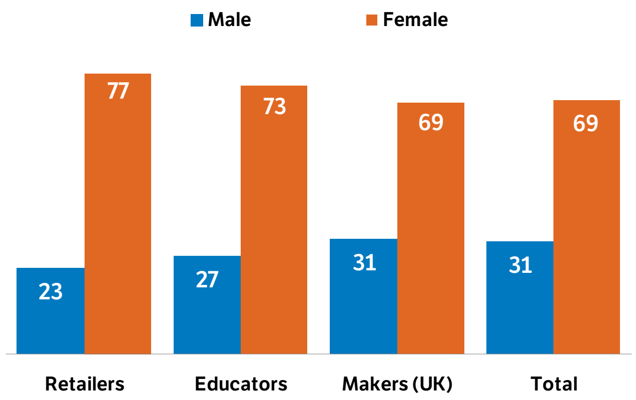
The chapter begins with an overview of the demographics of the respondents to the survey.

Gender

Overall, the survey respondents were 69% female, 31% male. The percentage of women was slightly higher among retailers and educators than among makers. This figure is a little higher than that recorded in previous surveys, and confirms the trend seen over the last twenty years of a steady rise in the percentage of women in the contemporary craft workforce.

Analysis of the under-35s indicated that the proportion of women was higher still among the younger age cohort, suggesting this increase in the female share of the craft community is likely to continue in the years to come.

Figure 5 Gender by category (percentage)



Source: BOP Consulting (2011) based on 2,046 responses

Age

Respondents were asked to place themselves in one of the age bands shown in Figure 6. There were relatively few under the age of 25, perhaps because the survey methodology, which was heavily dependent on the databases of the craft agencies, was more likely to pick up established makers. Increasing debts on graduation and the greater take-up of post-graduate courses may also be causing young makers to delay setting up their businesses.

Each of the other five age bands contained at least 12% of the respondents.

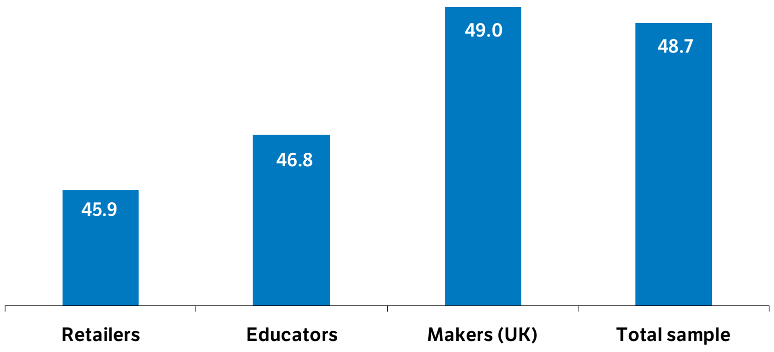
Figure 6 Respondents by age band

Age band	Total (%)	Male (%)	Female (%)
16-24	1.4	0.6	1.8
25-34	12.4	7.5	14.6
35-44	21.4	19.8	22.1
45-54	25.8	22.3	27.4
55-64	25.3	28.5	23.9
65 and over	12.2	20.0	8.8
Declined to answer	1.4	1.4	1.5

Source: BOP Consulting (2011)

As is shown in Figure 7, the overall average age of respondents (an approximate measure based on mid-points within the bands) was 48.7 years. The average age of makers surveyed was 49; retailers and educators were, on average, a little younger.

Figure 7 Estimated average age (in years) by category



Source: BOP Consulting (2011)

Disability

While previous studies have asked about disability, there has been some ambiguity over the inclusion of dyslexia. For this study, a separate question was included for each. More than a tenth of craft professionals said they were dyslexic (11.5%), while 4.1% described themselves as disabled (respondents were allowed to 'self-define' as such). 0.5% of respondents said they were both, and are therefore counted in both the disability and dyslexia totals.

Ethnicity

The large majority of people (81%) described themselves as White British, with 2.4% choosing 'White Irish' as a designation. (Around 3% declined to answer.) Black and minority ethnic (BME) people amounted to 3.5% of the sample. The 'Other White' group accounted for 10% of respondents. This group includes many Europeans, North Americans and white South Africans.

Comparing these results with 2007 data for the general population of England and Wales (Scottish and Northern Irish figures are compiled differently) suggests that the proportion of 'Other Whites' is significantly higher among craftspeople than among the population at large, where it was just 3.4%. On the other hand, Asian/Asian British people accounted for 5.5% of the general population in England and Wales in 2007, compared with just 0.7% in the UK-wide craft survey sample.

Figure 8 Ethnicity

Ethnic group	Percentage
White British	81.0
White Irish	2.4
White Other	10.0
Black/black British	0.5
Asian/Asian British	0.7
Mixed	0.8
Other	1.5
Declined to answer	3.2

Source: BOP Consulting (2011)

Language

Respondents in Wales and Scotland were asked about their proficiency in Welsh and Gaelic respectively. Around 10% of Welsh makers said they were fluent in Welsh, while another 22% had some command of the language. Among these groups, half used Welsh in their workplaces.

An ability to speak Gaelic was much less common among Scottish makers. Of the 361 makers spoken to, only one said they spoke Gaelic fluently, while a further 15 (4.2%) had some command of the language.

4.3 Makers and their businesses

The second series of figures looks at the business practices of makers. In all, 88% of them were sole traders.

Figure 9 Structure of craft businesses

Business structure	Percentage
Sole trader	87.7
Partnership	5.8
Limited liability partnership	1.8
Private company limited by shares	2.9
Private company limited by guarantee	0.1
Co-operative	0.4
Other	1.3

Source: BOP Consulting (2011)

Craft businesses are mostly small. Only 13 of the craft-making businesses surveyed employed five or more people.

The average length of time a business had been trading was 16 years (see Figure 10). The variety of responses is revealed when looking at the distribution across the sample: 20.5% of makers have been trading for less than 5 years, while 11% had been doing so for 35 years or more.

By ranking all makers in the sample from the least experienced to the most, the data can be considered from another angle. It shows that the middle-ranking person has been trading for 12 years (the 'median' length of time).

Figure 10 Number of years trading

Length of time trading	Percentage
Less than 5 years	20.5
5 yrs- 9 yrs	20.6
10 yrs- 14 yrs	14.8
15 yrs- 19 yrs	10.2
20 yrs- 24 yrs	8.5
25 yrs- 29 yrs	7.2
30 yrs- 34 yrs	7.0
35 or more	11.3
Average	16
Median	12

Source: BOP Consulting (2011)

In all, 43% of the sample began working professionally as a maker in the 2000s, with 21% having started in the 1990s.

Craft as a second career

For half (50%) of the interviewees, craft was not their first career. People moved into craft from an extremely wide range of professions: examples ranged from professional cricket and management consultancy to graphic design and health care. However, just over 12% of 'second career' makers originally worked as teachers.

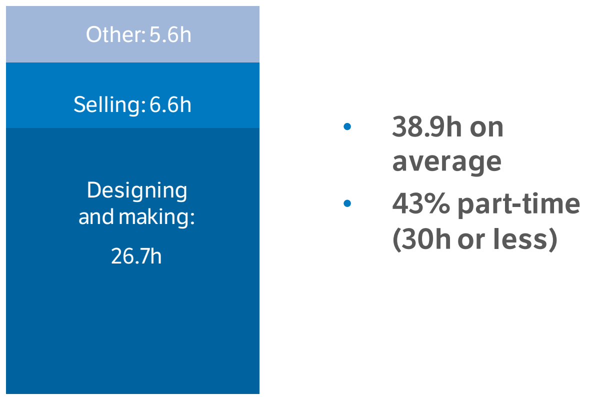
This percentage of 'second career' makers is a little lower than that reported in earlier surveys.

Hours worked

Makers typically spent just over 33 hours a week working on making and selling their work, with a further 5.6 hours spent on other craft-related activities (see Figure 11). This implies that, on average, craft-makers spend just under 39 hours on all aspects of their craft practice[40]. However, there was a wide variation in the number of hours reported, with 43% spending 30 hours or less on their craft activities, which was regarded as the threshold for part-time work in previous reports.

Regression analysis indicates that women are more likely to work part-time (less than 30 hours per week) than men, even after controlling for other factors. Makers who have a degree in a craft-related subject are less likely to work part-time, compared with all other makers, which implies these makers are more likely to be exclusively dedicated to their craft business. Other characteristics such as years of experience and age do not have statistically significant effects on hours worked.

Figure 11 Hours worked



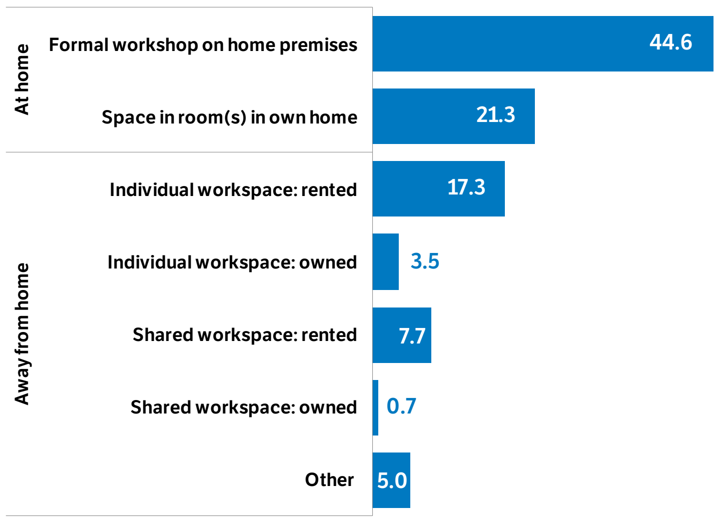
Source: BOP Consulting (2011)

[40] Some makers reported working more than 90 hours a week, While such levels of activity are plausible for short periods, it was felt that they were unlikely to be sustained across the year (since it corresponds to more than 15 hours a day, six days a week). These answers were therefore excluded from the estimates.

Location of workplace

Almost two-thirds of makers work at home, most usually in a formal workshop on their home premises. The majority of the remainder rent a workspace. Of the makers who said they rented a workspace, 56% did so within dedicated artists' studios.

Figure 12 Location of primary workplace (percentage of makers)



Source: BOP Consulting (2011)

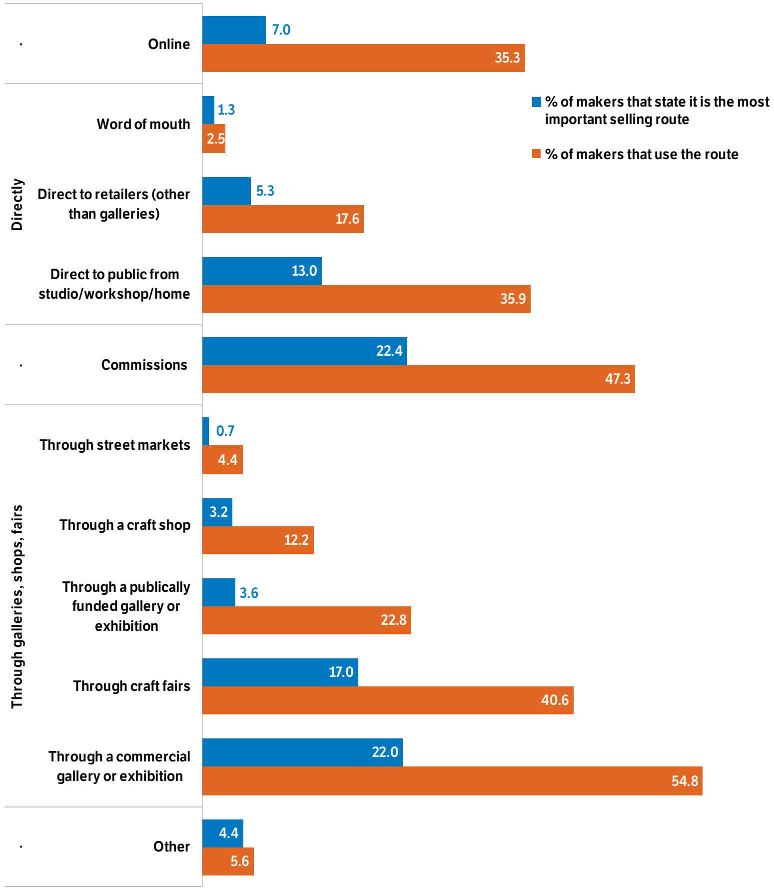
Regression analysis allows us to say something about the characteristics of workspace users. Makers from older cohorts are more likely to work at home (when controlling for other factors), as are women. There were also variations by materials used: textile makers were more likely to work at home, for instance.

Selling channels

Figure 13 shows the variety of channels used by makers to sell their craft objects. The most popular are commercial exhibitions and galleries, used by 55% of makers. Around 47% of all makers received commissions (from the general public, businesses and/or institutions) while more than a third sold through craft fairs or sold direct to the public from their workshop/home.

These four categories were also the most popular choices when makers were asked to identify their single most important selling channel. Selling through commercial galleries and exhibitions was the most important for 22%; while commissioning was the most important for another 22%.

Figure 13 Selling channels



Source: BOP Consulting (2011)

The percentage of makers' sales which came from their single most important sales channel (whichever that was) was 60-70% across almost all channels, with only social media being significantly lower. In other words, for the 'typical' maker their most important sales channel is the source of 60-70% of their craft object sales.

The split between commissioned and non-commissioned work (by value) for those who had work commissioned was almost even: 51% of these makers' turnover came from commissioned work in 2010. Makers who had received commissions also reported that the percentage of work derived from them had risen over the last three years (though this does not necessarily mean that commissioned sales were rising in absolute terms).

In all, 29% of makers said that their work had been bought by a public collection at some point in their careers – arguably, a measure of the perceived quality of a maker's work. Regression analysis showed that men were more likely to say so than women (other things being equal), while the chances also increased for more experienced makers and those who exported more. Ceramics makers were also slightly more likely than makers in other materials to say so.

The research was also interested in finding out if there was any evidence of a secondary market in craft – in other words, are objects being sold on by their original purchaser? One-fifth of the interviewees (20%) thought their work had been resold, while 40% thought it hadn't. (A further 40% didn't know.) Again, men, more experienced makers and those who exported more were more likely to say that their work had been resold.

Disciplines and materials used

The disciplines and materials used were varied (with 32% of makers using more than one material) but the three most common were ceramics, textiles and jewellery. They were followed by 'other metal', wood, glass and silver. A number of activities do not appear in Figure 14 as they fall below the 1.9% threshold for inclusion (a full list can be found in the appendices).

Most makers – 68% – worked with just one material, with 20% working in two and 8% in three.

Figure 14 Field of activity/materials used (percentage of makers)

Materials used (percentage at least 1.9%)	Percentage
Ceramics	25.7
Textiles (including knitting and embroidery, but excluding weaving)	22.9
Jewellery	20.0
Other metal (excluding jewellery and silver)	12.1
Wood (excluding furniture)	10.7
Glass	10.3
Silver	7.1
Furniture	5.9
Paper (excluding graphic craft)	4.0
Mixed media	3.7
Stone	2.7
Graphic craft (including calligraphy, sign writing, and bookbinding)	2.5
Synthetic materials (including plastics)	2.2
Leather	2.0
Weaving	1.9

Source: BOP Consulting (2011)

Analysing these results by gender shows that there are considerable differences between men and women in their choices of discipline or material. A higher proportion of women than men work in textiles, jewellery, paper and weaving, while a higher proportion of men work in ceramics, wood, furniture and other metal. Other differences between men and women shown in Figure 15 are statistically insignificant.

Figure 15 Materials used, by gender

	UK Percentage	Male makers: %	Female makers: %
Ceramics	25.7	30.0	23.8
Textiles	22.9	4.5	31.3
Jewellery	20.0	8.8	25.1
Other metal	12.1	16.9	9.9
Wood (exc. furniture)	10.7	23.8	4.7
Glass	10.3	10.4	10.3
Silver	7.1	6.4	7.4
Furniture	5.9	15.4	1.5
Paper (exc. graphic craft)	4.0	1.9	5.0
Mixed media	3.7	3.2	3.9
Stone	2.7	3.9	2.1
Graphic craft	2.5	3.1	2.3
Synthetic materials	2.2	2.6	2.0
Leather	2.0	2.1	1.9
Weaving	1.9	0.6	2.5

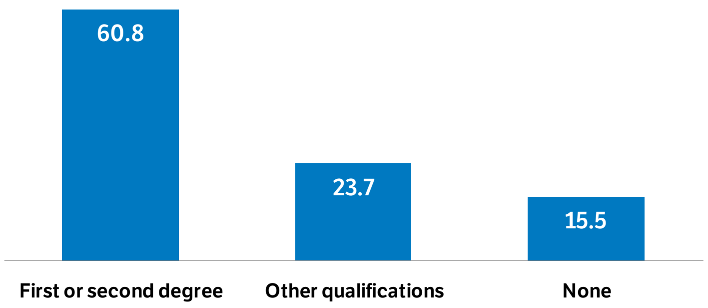
Source: BOP Consulting (2011)

Skills levels

Makers are a highly qualified group: just over 60% have a first or second degree in craft, art or design. Only one in six (15.5%) had no formal craft qualifications or training. For comparison, 30.0% of all working-age adults in the UK had level-4 qualifications (degree-level) or above in 2010, according to the Labour Force Survey.

Among makers, men were more likely to have no formal qualifications than women.

Figure 16 Levels of craft education (percentage of makers)



Source: BOP Consulting (2011)

Of those who had a degree, 36% had graduated in the 2000s, while 24% had done so in the 1990s.

General business skills

Almost 89% of makers met at least some of their general business skills needs (such as bookkeeping, website design, and marketing) themselves, while 20% outsourced some or all of this work to outside professionals, and 14% had help from a partner or family member.

Some 43% of the interviewees had had some training in business skills since they started their business: 27% had received formal training, while 21% had had informal training (a small proportion had received both).

Almost half (47%) of makers felt that they needed to develop additional business skills. A quarter (25%) wanted training in marketing (including web design), and 6% were looking for IT skills more generally, with 6% wanting bookkeeping/accountancy training.

Regression analysis showed that women were more likely to want additional skills training than men (after controlling for other factors), while the younger cohorts were much keener to acquire such skills than older ones were.

4.4 Makers' gross income

The literature review suggested that **portfolio working**, or developing multiple income streams, is becoming increasingly important to makers' businesses. This has been backed up by the data collected for this report. Just 27% of craft-makers derive all their income from the making and sale of contemporary craft objects. This means that the remaining 73% engage in other sorts of craft-related activities, including teaching or curating exhibitions, and/or in non craft-related activities. However is it worth stressing that even though most makers take on these other activities, the sale of objects was still the largest single source of income for them. Teaching was a significant source of income for a minority, with consultancy, writing professionally and curation being less important streams of income, on average.

In addition to portfolio working the research indicates that makers also adopt what economists call **income diversification**. That is to say, they also engage in other non craft-related activities that provide them with additional income outside their businesses. Of the makers who gave information on the topic, around 30% had non craft-related income of some kind.

Given the existence of portfolio working and income diversification, analysing maker's income is a less straightforward task than simply looking at the turnover derived from making and selling contemporary craft objects. Box 2 offers a definition for each income stream included in our calculation of gross income per business. All these figures are before taxes and do not include operating costs.

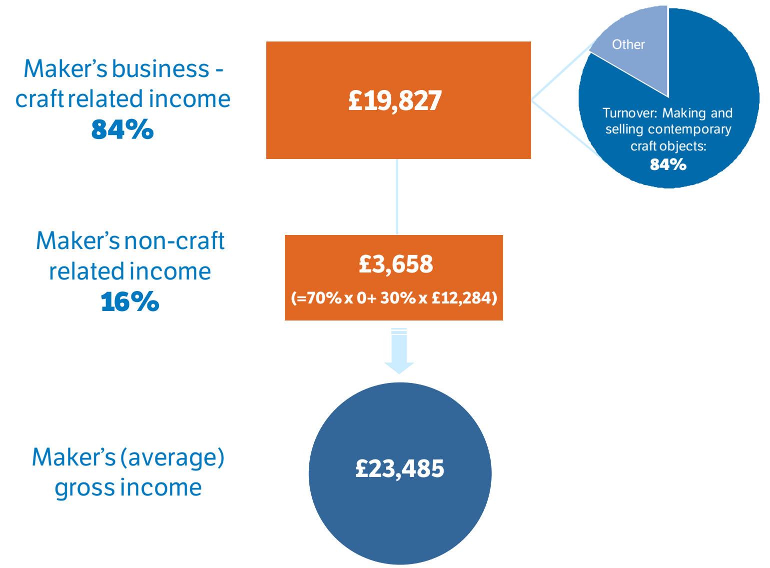
Box 2: Gross income

1. ***Maker's craft-related income***. There are two income streams associated with craft-related activities:
   - Turnover from making and selling contemporary craft objects. (This calculation excludes any turnover from making and selling heritage craft, which is included elsewhere.)
   - Income from other craft-related activities: including outsourcing craft skills, curating and organising exhibitions, and writing professionally about craft. Although this income is not directly generated through the sale of contemporary objects, it adds to makers' business income as it is part of the services they offer and through its contribution to enhancing their profile and promoting their work. This income stream also includes turnover from making and selling heritage craft. (As a small number of makers make both contemporary and heritage craft.)
2. ***Maker's other sources of income***. Income from non craft-related activities. This category includes a wide spectrum of sources of income, such as pensions and investments or earnings from employment unrelated to craft.
3. ***Gross income***: Gross income is calculated by adding the two streams of craft-related income and the third stream of non craft-related income: [Turnover from making and selling contemporary objects + Income from other craft related activities] + [Income from non craft-related activities].

The scale and relative importance of each different income stream is summarised below in Figure 17. It has been estimated that the gross income of an 'average' maker is £23,485.[41]

The income streams can be shown in a diagram.

Figure 17 Craft-maker's average gross income



Source: BOP Consulting (2011)

Craft-related income

As Figure 17 shows, 84% of the gross income of an 'average' maker came from craft-related activities (£19,827). Craft-related income encompasses two income streams. The larger one – turnover from making and selling contemporary craft objects – represents 84% (by coincidence) of the

[41] Respondents were asked to give exact figures for turnover. In cases where they declined to do so, a value was imputed from their business type and country, in line with standard survey practice.

total craft-related income. The remaining 16% comes from all other types of craft-related activities, such as teaching or consultancy.

Figure 18 shows that more than a third of the makers interviewed have a craft-related income of under £10,000, with 43% reporting an income of £10-£20,000 – in other words, 80% of craft-makers had a gross craft-related income of £20,000 or less. To compare this figure with other sectors: Creative & Cultural Skills has estimated that 73% of the performing arts workforce and 78% of the music sector's earn less than £20,000 a year.

An analysis just of turnover from sales of craft objects shows that more than half of makers sold less than £10,000 worth of objects in 2010.

Figure 18 Percentage of makers by craft-related income band and turnover band

Value	% of makers by craft-related income band	% of makers by turnover band (from selling and making objects only)
Up to £10,000	37.1	54.5
£10,001-£20,000	43.2	29.2
£20,001-£30,000	6.8	5.1
£30,001-£50,000	5.3	4.7
£50,001-£100,000	5.0	4.1
More than £100,000	2.6	2.4
Total	100	100
Average	£19,827	£16,572
Median	£10,750	£10,000

Source: BOP Consulting (2011)

As mentioned above, respondents earned money from several different types of craft-related activities. Informal and formal craft teaching accounted for 11%, with smaller percentages reported for working for other business sectors (consultancy), making heritage craft objects, writing on craft or being a craft-maker in residence.

Figure 19 Average percentage craft-related income by activity

Craft-related activity	Percentage
Making and selling contemporary craft objects	83.6
Teaching craft less formal groups e.g. evening classes, workshops	5.7
Teaching or lecturing in art/craft/design at an FE/HE institution	3.0
Owning, running or working in a commercial gallery or craft shop	2.0
Teaching art/craft/design in a school	2.0
Work for other business or sectors using craft skills and knowledge	2.0
Other craft-related activity	1.9
Making and selling heritage craft objects	1.4
Running or organising craft events such as exhibitions or fairs	0.2
Writing professionally about craft	0.2
Being a craft-maker in residence	0.2
Working in a public museum or gallery (including in the museum shop)	0.1
Curating exhibitions	0.1

Source: BOP Consulting (2011)

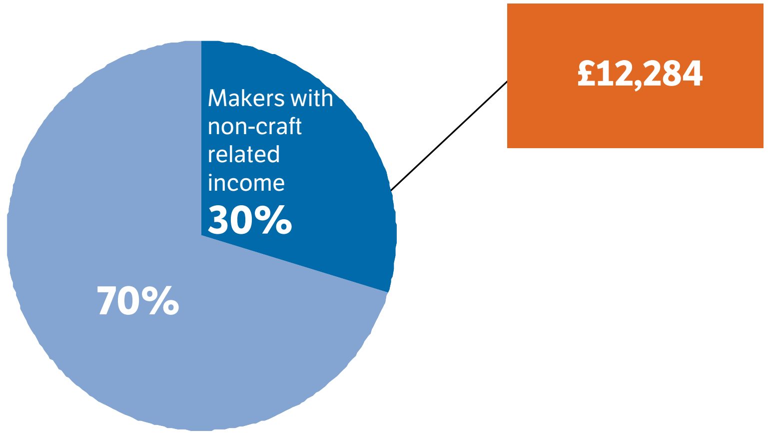
Regression analysis showed that men earned significantly more than women, and makers from younger cohorts earn more than makers from older ones (when controlling for other factors). Years of experience also have a positive correlation with craft-related income. Similarly, makers with a degree have a higher craft-related income compared with all other makers.

The direction of the relationship between craft-related income and these two factors – experience and qualifications – helps to explain some of the differences and similarities observed among the craft profiles. Artisans (as defined in this research) have the greatest number of years of experience, while craft careerists have the highest levels of qualifications. Both these factors help explain why artisans and craft careerists have higher – similar – craft-related incomes compared with the other types of makers (see chapter 5).

Non craft-related income

Income diversification is one strategy used by makers to secure additional income. In fact 43% of them report having some source of non craft-related income. Not all of these wished to disclose the amount of income generated from those activities, so we only have information on 1,479 makers. If we focus the analysis on this (still sizeable) sub-sample, we find that 70% of makers have no income from non craft-related activities, while the remaining 30% have some, with an average non craft-related income of £12,284. This implies that the average non craft-related income across the whole sample of makers with financial information on this issue is £3,658 (=70%*0+30%*£12,284). This amounts to 16% of craft-makers' average gross income (i.e. including both craft-related and non-craft related income).

Figure 20 Non craft-related income



Source: BOP Consulting (2011)

Figure 21 examines the source and value of this non craft-related income. Respondents were allowed to choose as many of these as applied, though in practice 93% of makers with non craft-related income reported only one source of additional income.

'Other part-time work' made up the most common source of non-craft income, with an average income value of £8,441. Retirement income (e.g. pensions) and (non craft-related) teaching were also important.

Figure 21 Sources of non craft-related income

Non craft related income	Percentage	Average income
Other part-time work	44.3	8,441
Retirement income (e.g. pensions)	21.6	14,131
Other private income (e.g. investments or inheritance)	14.4	13,017
Other full-time work	12.3	24,481
Teaching or lecturing at an FE/HE institution (but not in art/craft/design)	8.7	12,836
Teaching in a school (but not in art/craft/design)	4.2	9,769
Support from partner or family.	1.6	3,722

Source: BOP Consulting (2011)

Net profit of craft-related work

An additional indicator of business performance is the amount of net profit generated. On average, maker's businesses reported an average net profit of £6,231. These estimates ranged from a loss of £4,500 to a profit of £160,000. However, while 87% of the sample made a profit, almost half (46%) made less than £2,500 (see figure 22).

Part-timers made on average £3,302 profit while full-time makers made £8,308 on average.

Figure 22 Net profit

Net profit bands	Percentage
Negative or no profit	13.0
£1-£2,500	46.3
£2,501-£5,000	10.9
£5,001-£10,000	12.1
£10,001-£20,000	8.9
More than £20,000	8.7
Average	£6,231
Median	£1,500

Source: BOP Consulting (2011)

4.5 The four nations of the UK

The figures shown so far are UK-wide. The samples for makers are big enough to allow us to compare the four nations of the UK. Statistical analysis suggests that there are few systematic differences between the four countries. Most of the aggregated responses received for the survey questions are very similar across the four nations. However, some differences arise when looking at:

- Years of experience
- Education
- Use of public bodies

Makers in England have higher average years of experience (16.5) and higher qualifications (just 13% of the makers in England have no craft qualifications).These differences in experience and qualifications do not translate into higher (average) turnover among English makers. In fact, the differences in turnover are minor across the four countries and are not statistically significant once we control for age, gender, materials, years of experience, size of the business and qualifications.

The most obvious difference across the countries is the level of contact makers have with 'national-level' public sector bodies in their nation. (The survey did not ask about contact with regional bodies or guilds and societies.) Makers in Scotland and Northern Ireland are much more likely to have been in contact with a public sector body than were makers in England or Wales.

There were a number of other variations which were not statistically significant:

Makers in Scotland worked slightly longer hours than the UK average and had the highest craft-related income of the four nations. Makers in Scotland were also more likely to be using internet selling channels than the UK average. They were also a little more optimistic about the next three years than the UK average.

Makers in Wales were more likely to be male, and had the highest average age in the four nations. Wales was also the only country in which 'career changers' (those who came into craft from other professions, but who don't have a degree in craft or related subjects) made up the largest group among makers – in the other three, it was 'craft careerists'. Levels of sole trading were a little lower in Wales than the UK average.

Makers in Northern Ireland were a little more likely to work away from home, and to sell through commissioning, though were less likely to do so through galleries and exhibitions and online routes. Makers were also more likely than those in other nations to report having had business training since they began their professional career.

Figure 23 Craft-maker's average craft-related income per country

Source: BOP Consulting (2011)

A full set of question responses is included in each of the appendices.

4.6 Retailers' businesses

The phone survey talked to 128 retailers of craft goods. This is not a large enough number to be considered a statistically robust sample of the 'population' of craft retailers, but the researchers strived to ensure reasonable coverage of different types of retailers, including those who sell exclusively online. Of the sample, 57 (44%) sold only contemporary craft objects (for the purposes of this report, this group has been called specialist retailers), while 71 (56%) sold other items as well. The retailers had been trading for an average of 19.7 years, and employed an average of 4.5 staff.

Retailers who sold items other than contemporary craft objects were most likely to sell fine art objects (paintings and sculpture), followed by stationery and gifts, and prints. This group is referred to as 'generalist' retailers in this report.

Figure 24 Type of goods sold by generalists, other than contemporary craft

Type of goods sold	Percentage
Fine arts	30.5
Stationery, cards, manufactured gifts	17.2
Prints	16.4
Run classes or workshops	10.9
Heritage craft objects	7.0
Art and craft materials and supplies	3.9
Café	3.9
Other	12.5

Source: BOP Consulting (2011)

Retailers were also asked to estimate the proportion of their sales derived from contemporary craft, and its value, although only around half of them answered the question about value. Those who did indicated that 74% of their sales came from contemporary craft, with an average value of £88,395 per retailer. (This figure can be re-worked to give an estimate of total sales for specialist retailers of £126,046, and £121,256 for generalist ones.) In all, 64% of all recorded contemporary craft sales took place in specialist (contemporary craft-only) retailers.

On average, retailers sold between three and four different categories of craft. Jewellery and ceramics were the most popular, followed by textiles and glassware.

Figure 25 Type of craft sold

Type of craft	Percentage of retailers
Ceramics	78.9
Jewellery	75.8
Textiles (including knitting and embroidery, but excluding weaving)	53.1
Glassware	51.6
Other	41.4
Paper, books and stationery (excluding graphic craft)	21.1
Furniture	18.0
Stoneware	17.2
Graphic craft (including calligraphy)	11.7
Interior and exterior fittings (e.g. gates, banisters)	8.6
Toys and automata	8.6

Source: BOP Consulting (2011)

For almost half the retailers (49%) jewellery was the craft-form that generated the most revenue, while ceramics was the biggest for a fifth of them.

Figure 26 Craft form generating most revenue by retailer

Type of craft generating most revenue	Percentage of retailers
Jewellery	49.0
Ceramics	20.6
Textiles and clothes	7.8
Glassware	5.9
Interior and exterior fittings (e.g. gates, banisters)	1.0
Paper, books and stationery (excluding	2.0
Graphic craft (including calligraphy)	1.0
Other type of craft mentioned	12.8

Source: BOP Consulting (2011)

Selling channels

The two most frequently mentioned selling channels were the gallery/shop itself and the business' own website (92% and 33% respectively). Around 5% of retailers made sales through social media, but none of the retailers thought it was their most important sales channel.

Figure 27 Through which channel do you sell contemporary craft?

Channel	% of retailers that use the channel	% of retailers choosing the channels as the most important
Through a gallery or shop	92.2	86.7
Through your own website	32.8	5.5
Through other websites	5.5	0.8
Through social media (e.g. Facebook and Twitter)	4.7	0.0
Through direct mail (catalogues, directories etc)	4.7	1.6
Through craft fairs	8.6	1.6
At events or festivals	13.3	2.3
At courses or workshops you run	2.3	0.8
Other channel mentioned	4.7	0.8

Source: BOP Consulting (2011)

Retailers were asked if they participated in the 'Own Art' scheme (In England, Scotland and Northern Ireland) or its Welsh equivalent, Collectorplan. Own Art provides interest-free loans to support the purchase of contemporary art and craft in any media by a living artist. In all, 30% of the retailers belonged to these schemes.

Comparisons between specialist and generalist retailers

Comparisons between the two types of retailer, specialists (selling only contemporary craft) and generalists (selling a mix of product lines), showed that generalists were more dependent on their gallery/shop than specialists were.

Figure 28 Which is your most important selling channel?

Selling channel	Specialist %	Generalist %
Through a gallery or shop	80.7	91.5
Through your own website	7.0	4.2
Through other websites	1.8	0.0
Through other direct mail (catalogues, directories etc)	1.8	1.4
Through craft fairs	3.5	0.0
At events or festivals	3.5	1.4
At courses or workshops you run	0.0	1.4
Other	1.8	0.0

Source: BOP Consulting (2011)

Both specialists and generalists sell a wide array of craft-forms.

Figure 29 What type of contemporary craft do you sell?

Craft form sold	Specialists	Generalists
Jewellery	75.4	76.1
Ceramics	66.7	88.7
Textiles and clothes	43.9	60.6
Glassware	43.9	57.7
Furniture	19.3	16.9
Stoneware	17.5	16.9
Paper, books and stationery	15.8	25.4
Graphic craft	14.0	9.9
Interior and exterior fittings	10.5	7.0
Toys and automata	5.3	11.3
Other	43.9	39.4

Source: BOP Consulting (2011)

4.7 Educators, writers and curators

The research also looked at educators, writers and curators. In total 71 interviews were carried out with these groups.

Educators, writers and curators are in many cases pursuing portfolio careers in which their income is derived from a mix of activities primarily in craft or closely related fields (art and design).

Figure 30 Did you earn income from any of the following in 2010?

	Percentage
Formal teaching of craft skills in a school or HE/FE institution	73.2
Informal teaching of craft skills	19.7
Writing about craft	19.7
Teaching or lecturing about craft appreciation	14.1
Curating	11.3
Working for a craft organisation	4.2
Making contemporary craft objects	31.0

Source: BOP Consulting (2011)

Most of those interviewed (87%) taught formally, at least part of the time, usually at a higher education institution. Subjects varied: they included craft-making skills, craft appreciation and design, among others. Almost 20% of respondents taught informally at venues such as community centres, gallery spaces and colleges, to a wide mix of people.

Nearly 20% had income from writing about craft, typically on a freelance basis, while 11% earned income from curating.

Almost a third of the educators, writers and curators group reported earning some money from the making of contemporary craft objects, though this was not their primary source of craft-related income.

5. Findings: profiles of makers

The business structure and demographic analysis is informative, but focusing on averages can mask wide variations in individuals' experiences. Through the analysis of the qualitative and quantitative information collected in this research and the literature review it became apparent that the profile of the 'typical' craft-maker was failing to capture some of the more subtle differences between types of makers.

Two characteristics of makers in particular seemed to be playing a role in explaining differences between them: levels of qualifications and whether or not craft-making was their first career. Assigning makers to these categories creates four distinct groups, or profiles, shown in Figure 31. The data was then probed further to see whether there were differences in practice and business performance between the four profiles of makers.

For the sake of clarity, this report gives names to each of these four profiles, which try to capture something of the differences between the makers in them. It should be noted that the way these terms are used in this report may differ from the ways they are used elsewhere.

The first and largest group has been called the **'craft careerists'**. People in this group are committed to the idea of craft as a career, and move to start their businesses shortly after finishing their first (or second) degrees in craft-related subjects.

The second group has been labelled **'artisans'**. Members of this group also made craft their first career but did not pursue academic degrees in the subject. This is the smallest group overall, accounting for just under 12% of the sample.

The third group of makers began their working lives in other careers before taking up craft as a profession, often in mid-life. These have been called **'career changers'**. They represent more than a quarter of those surveyed.

The final group has been called **'returners'.** These are makers who trained in art, craft or design, but who did not pursue craft as a first career. They followed another path after university or college before 'returning' to craft later on. They make up 22% of the sample.

Figure 31 Makers' profiles

		Craft qualifications	
		First or second degree	Other or no qualification
Contemporary craft-making as a first career	Yes	'Craft careerists' (38.4%)	'Artisans' (11.7%)
	No	'Returners' (22.4%)	'Career changers' (27.5%)

Source: BOP Consulting (2011)

'Craft careerists' is the largest group in three of the four countries of the UK. The exception is Wales, where 'career changers' is the largest group (see fig. 32).

More than half of makers (61%) have a relevant degree and the number for whom it is a first career seems to be growing, suggesting that craft practice is becoming 'professionalised', and that an academic training in the subject (or in closely-related ones) has become the primary pathway into the profession. The prominence of the craft careerists would appear to confirm this.

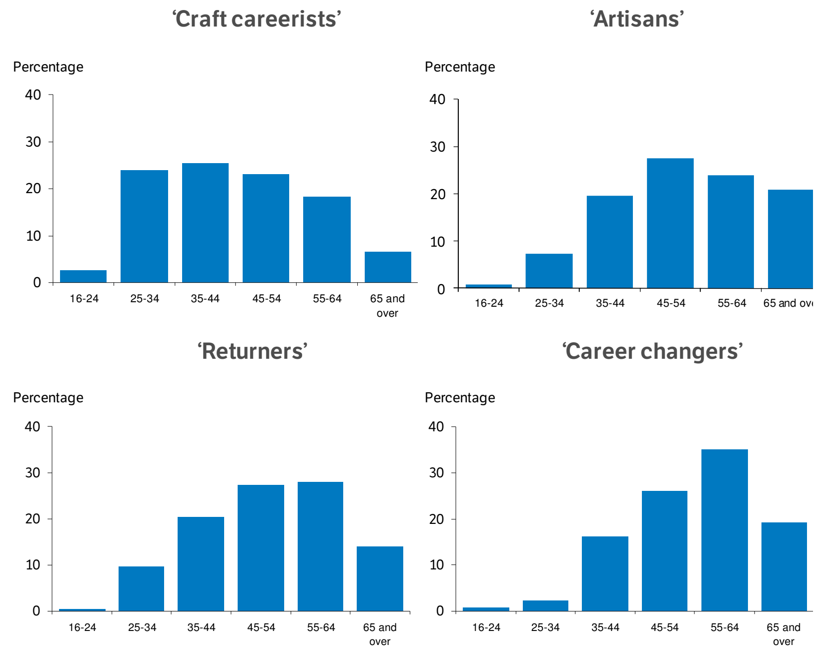
Figure 32 Makers' profile by country

Profile	England	Scotland	Wales	Northern Ireland
Craft careerists	38.8	38.8	33.2	38.1
Career changers	25.9	31.6	35.4	29.4
Returners	23.8	17.5	21.2	18.1
Artisans	11.6	12.2	10.2	14.4

Source: BOP Consulting (2011)

The first notable difference between makers' profiles emerges when looking at age. More of the craft careerists are found in the younger cohorts, compared with the other groups. Career changers, on the other hand, tend to be concentrated among the older cohorts.

Figure 33 Age profile of makers' groups



Source: BOP Consulting (2011)

Figure 34 shows there are additional differences between the four profiles. Craft careerists and returners are more likely to be female compared with the total sample.

Artisans and craft careerists are more dependent on their craft-related income than the other two groups, being less likely to have other sources of income outside their craft practice. This is especially true for artisans, of whom just one-fifth report non craft-related income.

Career changers and returners are more likely to have non craft-related income, presumably reflecting their 'previous life' before establishing their craft practice. Career changers are more likely to have retirement income than the others (as their older age profile would suggest).

Artisans have the longest average years of experience, followed by craft careerists. The difference in experience between these two types of maker is 6.5 years, which implies that artisans started their practice earlier, even after allowing for the three or four years that craft careerists must have dedicated to pursuing their degrees.

Figure 34 General characteristics, per makers' profile

Profile	Gender (% female)	% of makers with non craft-related income	Average years of experience
Craft careerists	72.7	27.1	16.9
Career changers	65.1	36.4	13.7
Returners	72.9	33.1	13.4
Artisans	54.9	19.4	23.4
Total	68.6	29.9	16.0

Source: BOP Consulting (2011)

The vast majority of makers are sole traders, irrespective of the profile they fit into (see Figure 35). However, differences emerge when looking at businesses' performance. Artisans and craft careerists have the highest average craft-related income. There is a difference of around £4,000 between their averages, though this difference is not statistically significant – in technical terms, the difference in their average craft-related income is smaller than the margin of error for the sample. Hence, we cannot confirm for certain that this difference would be replicated in the wider craft 'population'.

This result, which may seem surprising on the surface, seems to be a reflection of a trade-off between income gains generated by qualifications on one hand, and accumulated years of experience on the other.

The regression analysis described in section 4.4 shows that there is a positive correlation between years of experience and craft-related income, but also between qualifications and craft-related income. This means that the particular traits that artisans and craft careerists have (as defined in this research) are reflected in their higher – similar – craft-related incomes compared with the other makers.

Craft careerists are also slightly more likely to export their craft objects, compared with other makers.

Figure 35 Business and income, per makers' profile

Profile	% sole traders	Average craft related income	% of makers that export
Craft careerists	87.2	23,133	34.3
Career changers	88.4	15,385	24.1
Returners	89.4	15,931	24.4
Artisans	84.8	27,095	27.6
Total	87.7	19,827	28.5

Source: BOP Consulting (2011)

Figure 36 shows further indicators on craft practice across the different profiles. It reveals clear differences between craft careerists and the other three profiles, including artisans. Craft careerists are more likely to (i) use digital technology in their practice of making and designing their craft objects; (ii) have changed their practice (in the last three years) due to environmental concerns, and (iii) sell their work through the internet. This suggests that craft careerists are more willing to adjust their practice in response to changes in the wider culture.

Furthermore, when asked if there are any specific business skills they would like to develop, craft careerists are more likely to name at least one such (54%) compared with returners, artisans, and career changers (48%, 43% and 39% respectively) – again suggesting that craft careerists are keener to embrace change.

Craft careerists are also more likely to report having had their work bought by a public collection. This indicates that, insofar as the buying tastes of public collections reflect perceptions of quality, proportionately more craft careerists are creating work of a high standard.

Figure 36 Practice, per makers' profile

Profile	%makers that sell their work online (inc websites and social media)	% of makers that use digital technology on making or designing	% of makers that have change their practice due to environmental concerns	% of makers whose work has been sold to a public collection
Craft careerists	39.3	42.7	34.1	37.3
Career changers	30.2	28.6	28.8	15.1
Returners	36.3	35.9	30.8	31.5
Artisans	32.6	29.6	30.2	26.7
Total	35.3	35.8	31.4	28.6

Source: BOP Consulting (2011)

In summary, analysing makers by qualifications and first career seems to provide deeper insights into their characteristics and attitudes towards craft practice, and the performance of their businesses. In particular, there are clear differences between craft careerists and career changers.

'Nova' by Stella Harding, Portraits in the Making exhibition at Pitzhanger Manor, 2011. Photo by Sylvain Deleu, courtesy of Crafts Council.

6. Findings: four themes

The contemporary craft sector has its own particular characteristics, but it cannot be seen in isolation. As the title of this report suggests, the current age is one marked by rapid change: in economics, the environment, and in culture. The impact of these wider changes on craft was explored in the literature review and the discussions with the focus groups. From these, four themes emerged, which helped to shape the phone survey.

- How are internet and digital technologies shaping craft practice?
- How does the global vs local debate play out in the sector?
- To what extent are issues of sustainability affecting practice in the sector?
- How have the recent economic difficulties affected the sector?

These areas are clearly interrelated. The spread of the internet has spurred globalisation by creating greater opportunities for trade and by speeding the transmission of new ideas, while the increased consumption of resources by emerging economies stemming from globalisation has helped focus attention on issues of sustainability.

These are hugely complex areas, which will continue to shape the economic, political and cultural landscape for years to come. The phone survey enabled us to gather some evidence on these long-term issues, as they affect the contemporary craft sector. This chapter considers the results from the survey that relate to these four themes.

6.1 How are internet and digital technologies shaping craft practice?

Internet and digital technologies have radically re-shaped many of the creative industries, including music, publishing and film. These technologies have greatly amplified the potential market for creative products, by allowing producers to reach entirely new customer bases, but have also opened up such industries to foreign competition and to the risks of intellectual property theft.

Craft might seem to be relatively immune from such trends. The sector emphasises the authenticity and uniqueness of its products and services, and there is a widespread belief that people like to hold an object in their hands before buying it – and that this physical experience cannot be replicated online.

Yet cutting-edge technologies such as laser cutting and 3D printing have opened up new possibilities for makers. Indeed, 3D printing, which allows a blueprint on a computer to be 'printed' in materials such as plastic or metal, has been described by *The Economist* as 'the manufacturing technology that will change the world'.[42] While such technologies are not necessarily widely used by the craft-making population as a whole (though some mid-career makers have embraced them), they are used in universities and colleges, and are therefore shaping the next generation of craft-makers. These technologies also make it much easier to replicate the work of makers.

The survey examined two areas which relate to this question: changes in makers' practice, and changes in their methods of selling.

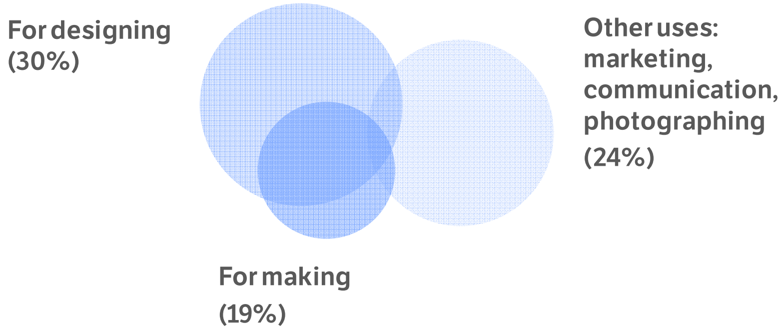
Changing practice

The majority of makers were using digital technology in some form in their practice or production: in all, 57% did so. Of all those who were using digital technology in their practice or production, 57% (by coincidence) did so all the time or often.

[42] The Economist, *Print me a Stradivarius*, February 12-18, 2011, London.

Some 30% of all makers used digital technology for designing, with 19% using it for making. As the chart below shows, there is considerable overlap between the two: of the makers who use digital technology in the design of their work, 44% also used such technology in the making of it.

Figure 37 Use of digital technology in practice/production



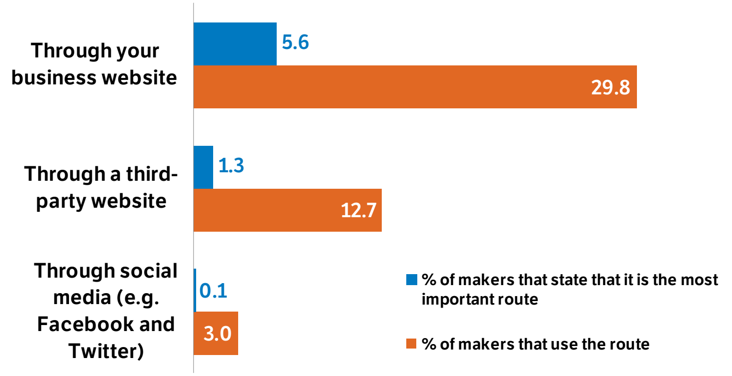
Source: BOP Consulting (2011)

Selling

While selling through websites and social media is growing strongly, their share of total sales is still relatively small. The survey suggests that around 30% of makers sell through their own website, with 13% selling through third-party websites. (The focus groups suggested that selective, 'curated' third-party sites were often valued because that 'curation' was an implicit guarantee of quality to customers.) Selling through their own website is the most important sales channel of all for around 6% of makers, which suggests that there are ways around the issue of needing to see or touch the object physically before purchase.

Just 3% of makers sold through social media, reflecting findings in the literature review that such channels currently tend to be used more for collaboration with other makers than for selling.

Figure 38 Online selling channels



Source: BOP Consulting (2011)

When makers were asked how the value of each selling channel had changed over the last three years, the three forms of online selling (own website, third-party website, social media) had increased, while many of the other 'offline' channels had declined.

6.2 How does the global vs local debate play out in the sector?

The last twenty years have seen a range of changes to the world economy that has come to be known as globalisation. The collapse of communism in Eastern Europe, the economic reforms in China and India, the establishment of the European Union's single market and the spread of more market-based economies in Latin America and Africa have drawn vast numbers of new consumers and producers into the global economy. The sheer size of some of these markets and their rapid economic growth mean there are large numbers of consumers willing and able to buy branded and 'luxury' goods.

Yet new competition from these places has dramatically altered patterns of production. In particular, in many 'creative' manufacturing sectors in Britain, including clothes and furniture, the lower end of the market has been lost to overseas competition, especially from East Asia and Eastern Europe.

The craft sector finds itself pulled in different directions. There is a strong 'localist' strain in craft. Many makers seek to build small businesses strongly rooted in particular places, emphasising authenticity and building on local traditions in, for example, their choice of material. On the other hand, many makers want to take advantage of the business opportunities globalisation offers.

Higher education has been through a globalisation process of its own. Over the last two decades, British universities have significantly increased their recruitment of overseas students. The UK's craft, art and design courses have strong international reputations, and have participated in this outreach. Many of these foreign students stay in Britain after graduation, and it was suggested by some participants in the focus groups that this has contributed to a more cosmopolitan culture in British craft, as different national traditions come together, mix and influence each other.

Pinning down these global vs local issues in hard data is not straightforward. A number of aspects of this topic have therefore been considered.

Exports

Over 70% of makers do not export their products outside the UK. Among those who do, however, exports accounts for almost 20% of turnover. The proportion of makers who export is higher in Northern Ireland, reflecting strong market links with the Republic of Ireland and with the Irish diaspora, especially in the United States.

Figure 39 Exports outside UK

Exports as percentage of total sales	Percentage of makers
0	71.6
>0-25	21.7
>25-50	3.9
>50-75	1.5
>75-100	1.3
Total	100.0

Source: BOP Consulting (2011)

Retailers' sales

Looking first at purchases of craft by retailers for onward sale, some 43% of retailers sold work by overseas makers, with the largest single group of these makers coming from continental Europe. However, overseas makers made up only a very small proportion of retailers' overall sales: 6%.

Sales of craft by retailers were mostly to local customers. The majority of sales were to customers from the area local to the retailer (58%), with a further 24% from elsewhere in their 'nation'. Just under 10% of sales were to customers from outside the UK.

Figure 40 Percentage of sales by customer origin

Source of customers	Percentage
Local area	58.1
Rest of England/Scotland/Wales/NI (as approp.)	24.2
Rest of UK	13.9
Rest of Europe	3.0
North America	1.6
Republic of Ireland	0.9
Asia	0.5
Rest of the world	3.4

Source: BOP Consulting (2011)

Tourism

Makers and retailers were also asked to estimate the importance of tourism to their business. (The survey did not distinguish between domestic and international tourists.)

Among makers, 43% thought tourism was very or fairly important to their business. Makers in Scotland, Wales and Northern Ireland were more likely to say that this was the case than were makers in England.

Figure 41 Importance of tourism to makers' businesses

Importance of tourism	Percentage
Very important	17.8
Fairly important	25.4
Not very important	29.1
Unimportant	27.6

Source: BOP Consulting (2011)

Tourism was more significant for retailers: two-thirds of them said that it was very or fairly important to their business.

Figure 42 Importance of tourism to retailers' businesses

Importance of tourism	Percentage
Very important	34.4
Fairly important	33.6
Neither important nor unimportant	7.0
Not very important	18.8
Unimportant	6.3

Source: BOP Consulting (2011)

Percentage of respondents born outside the UK

Over 12% of respondents were born overseas, with the United States, Germany, South Africa, the Republic of Ireland and India being the most frequently mentioned places of birth outside the UK. (According to the Annual Population Survey 11.5% of the UK's total population was foreign-born in 2010.) The craft sector is thus a little more diverse in this respect than the UK population as a whole, and may support the argument about craft having a cosmopolitan culture.

6.3 To what extent are issues of sustainability affecting practice in the craft sector?

One area in which the global vs local debate plays out is the fields of the environment and ethics. The growing evidence of climate change is a global issue, yet local solutions are (to some degree at least) part of the answer.

The survey asked makers if they had changed their practice in the last three years in response to environmental or ethical concerns. It has been pointed out that businesses that were set up with these concerns in mind might not be picked up in the survey, as they may not have actually changed their practice, but continued with their existing good practice. However, as most craft businesses have been trading for some time (an average of 16 years), it was felt that it was reasonable to ask about change. With that proviso, 31% of makers had changed their practice in response to environmental concerns. Of those who had done so, more than half were trying to use more environmentally sensitive or sustainable materials, while just under a third had changed their production processes to make them more environmentally sensitive or sustainable. A fifth were using local suppliers in a bid to reduce transport miles. Makers using textiles and glass were more likely to have made such changes than makers in other materials, though the differences were modest.

Figure 43 Changes in environmental practice

Changes in environmental practice	Percentage of those changing practice
Source more environmentally sensitive or sustainable materials	51.5
Use more environmentally sensitive or sustainable production processes	32.8
Choose local suppliers to reduce transport miles	20.3
Choose suppliers with more environmentally sustainable practices	11.1
Choose distributors/retailers with more environmentally sustainable practices	7.0
Recycling	4.5
Other	15.5

Source: BOP Consulting (2011)

Only 14% of makers said they had made changes to their practice on ethical grounds. A wide range of changes were described by the 14%; the five most common were:

- Recycled materials
- Use of local suppliers
- Sourcing of materials
- Fair-trade products
- Ethical materials

Clearly, there is some overlap between these categories and those listed under environmental concerns.

Regression analysis suggests these environmental/ethical trends cut across all age groups, nations, income and experience levels in craft. This in turn seems to imply that these concerns are simply part of a wider change in society's attitudes to these subjects rather than being driven by particular issues within the craft sector.

6.4 Recent economic changes in the sector

In the last three years the economy has experienced its most turbulent period for decades. Alistair Darling, the then Chancellor, said at the time of the credit crunch in 2008 that Britain was facing its worst economic downturn for 60 years. The three years since have seen a deep recession followed by a period of very slow growth, as both the public and private sectors seek to pay down debt. In this time, many small companies have struggled to secure loans from banks. Prospects for the economy as a whole in the years ahead look gloomy at the time of writing, with the problems in the eurozone adding to the sense of uncertainty.

Data discussed in the literature review suggests that the craft-related income of makers' businesses has declined somewhat since the last major survey in 2004, although methodological differences between the two surveys may explain much of this. There seems, however, to be evidence of an increase in the level of part-time working compared with recent surveys, although these part-time makers are selling much more than part-timers in previous surveys did. This implies they may be previously full-time makers cutting back hours in the light of economic difficulties, though this is speculative. Makers reported declines in the value of the majority of their selling channels, though the net declines were usually relatively modest.

Retailers, on the other hand, reported that their sales have broadly been stable in net terms, with expanding businesses offsetting declining ones.

Despite this tough climate, makers and retailers are, perhaps surprisingly, cautiously optimistic about the future.

Prospects for the future

Figure 44 Makers – expected change in craft-related sales over the next three years

Change in craft-related sales	Percentage
Grow considerably	17.2
Grow slightly	34.9
Stay steady	21.4
Decline slightly	7.6
Decline considerably	4.6
Don't know	12.8
Not applicable	1.5

Source: BOP Consulting (2011)

Many makers recognised that adapting to the new economic climate would require them to make changes. Developing new or different products was the most popular option, with 63% saying they intended to do this while 58% wanted to find new markets, and 49% were looking to use different materials.

Retailers were also asked to assess their business's prospects over the next three years, both in general and considering craft sales in particular. The two sets of figures were broadly similar, with around two-thirds expecting either modest growth or steady sales.

Figure 45 Retailers – expected change in craft-related and total sales over the next three years

	% change in craft-related sales	% change in overall sales
Grow considerably	9.4	7.0
Grow slightly	38.3	38.0
Stay steady	28.1	31.0
Decline slightly	6.3	7.0
Decline considerably	3.9	1.4
Don't know	14.1	15.5

Source: BOP Consulting (2011)

7. Conclusions

The survey suggests that, in many respects, the structure of the contemporary craft sector is relatively stable. It remains dominated by small, well-established businesses. The characteristics of makers have changed relatively little since the early 2000s, although practice is shifting to reflect the new possibilities of digital technology and environmental and ethical concerns. Retailers reported that, on balance, their sales had been fairly steady over the last three years. Both retailers and makers were cautiously optimistic about the future at the time of the survey (June/July 2011).

Nevertheless, the contemporary craft sector clearly faces challenges in the years ahead. Insofar as it is possible to tell, given methodological differences between this survey and previous ones, makers' gross craft-related incomes have declined moderately of late. Sales through the majority of 'real world' selling channels have fallen, and while online sales have grown, they have done so from a low base, and have only partially compensated for losses elsewhere. There seems to have been an increase in part-time working, though such workers are earning more than part-timers in previous surveys were. Net profits remain modest (more than half of makers report making less than £5,000 a year), and many makers feel they lack the general business skills they need to grow, especially in marketing. Although the large majority of makers have other craft-related income sources apart from designing and making objects, these are, with the exception of teaching, relatively small contributors to gross income. Craft sales remain locally focused, with limited exports.

BOP Consulting's analysis of the four profiles of makers offers deeper insights into the sector. It suggests that in many ways the sector is being led by the craft careerists – highly educated and determined on a career in craft – who are younger and are earning more than the craft average, are keen to develop and use new skills, and produce work that is more likely to be exported or be bought by public collections.

This document is a research report, and it is not its place to make policy or strategy recommendations. Nevertheless, the research has flagged up a number of questions and issues for the future, which are worth discussing in a little more depth.

- **What will the rise of digital technologies do to the concept of craft?**

Digital technology has been on a 'long march' through the creative industries, transforming business models as it goes. The music, newspaper, photography and film industries have been radically altered, and even sectors that initially seemed less likely to be affected, such as book publishing, are now changing fast. Craft too is now being touched by these developments. The unique, hand-made nature of craft objects lies at the heart of the profession, reflecting core beliefs such as the importance of authenticity and the value of workmanship. Yet if technologies such as 3D printing become ubiquitous, and it becomes possible to make distinctive objects at the touch of a button, what does that imply for the whole notion of craft? Will the boundaries between craft, fine art and design blur still further as a result? Is such a change a threat to the identity of craft or an opportunity for exchanging ideas across artistic and wider agendas? What will being a craft professional actually mean in these circumstances?

- **What will the economic effects of the 'age of austerity' be?**

The challenges that Britain's economy faces over the next few years suggest that domestic economic growth is likely to remain slow. Globally, growth is likely to be concentrated in the emerging economies. Most makers are sole traders, and most of them currently do not export. How can they be encouraged and supported to find opportunities overseas? Are there other ways in which makers can use their specialist skills, knowledge of materials and experience of innovation and product development to earn money in international markets?

Online sales represent the growth area in the domestic market, albeit from a low base, but a significant minority of makers feel they lack marketing skills (including in digital marketing). Currently many buyers prefer to physically see and touch the object before purchase. How can craft address this issue? What are the lessons from other art-forms, and can they be applied to craft? And what are the implications for commercial galleries?

The domestic market for low- and middle-end creative products of many kinds (i.e. products other than craft) has been affected for several years by imports of cheap goods of reasonable quality. The logic of globalisation and greater competition suggests that the future market for UK craft will become increasingly concentrated at the higher end, where originality and aesthetic value count for more than cost and where skills and knowledge can earn a premium. However, in tough economic times consumers may cut back on expensive and 'luxury' purchases. Is there a danger of a backlash against conspicuous consumption? How should craft position itself in such a market?

Economic problems may also affect the type of people who enter the profession. What will the effect of slow growth be on the career changers and returners? Will increasing levels of redundancy and unemployment lead more people to turn to craft as an alternative career, or will economic uncertainty make people more reluctant to take the gamble of changing direction?

Finally, will economic pressures accelerate the trend for portfolio working, as people look to capitalise on their craft skills to bring in income from a broader range of sources, or will it reduce the number of opportunities, as other sectors cut back too? Are makers in particular able to market themselves well enough to develop the profile required to take up opportunities outside the immediate craft sector?

- **What effect will changes to higher education have on craft?**

Craft has become 'professionalised' in recent years, with first and second degrees becoming a key pathway into the profession. Teaching in higher education institutions is also an important source of income for many craft professionals. Yet there have been signs for some years that this picture is changing. More specialist craft courses have closed (for reasons including cost, lack of demand, lack of space, and health and safety issues) than have opened, while there has been a notable rise in the number of interdisciplinary courses incorporating a craft element. Fees are set to rise for university students in England and there is some early (if incomplete) evidence that numbers applying for art and design courses are falling as a result (though this follows a surge in 2010). What do such changes imply for the structure of the craft sector? Will other routes into the profession – apprenticeships, or working with more experienced makers – revive, or will interdisciplinary courses and other degree paths increase in prominence?

- **What effect will budget cuts in the arts and cultural sector have?**

Craft, like many of the creative industries, has a mixed private-sector/public-sector economy. As part of the wider effort to restrain public spending, cuts have been announced to the budget of the DCMS (in England) and the departments of the devolved governments (in Scotland, Wales and Northern Ireland) which cover the arts. Local authorities too are reducing their spending on arts and culture. What will be the implications for craft, both of the likely reduction in direct spending on craft (through the purchase and commissioning of craft work by public collections) and in the arts support infrastructure on which a sizeable number of craft professionals draw? What about other commissioning areas where some makers were starting to sell their services, such as healthcare?

- **Can craft respond to the growing concerns over environmental and ethical issues?**

Craft would seem, on the face of it, to be well-placed to benefit from these wider shifts in the culture. Craft-making is often imagined as a small-scale, 'authentic' form of production, rooted in natural materials, and it is true that many makers have already responded to environment and ethical concerns. However, some of the most significant craft disciplines, such as ceramics and glass, use methods (firing, glazing) that are not environmentally friendly but which cannot readily be replaced in current practice.

Can makers, given their often limited financial resources, find ways to mitigate the potential damage such practices cause?

Closing thoughts

These questions and issues suggest contemporary craft may be facing a period of unusual turbulence: there have rarely been so many challenges on so many fronts simultaneously. However, craft has a range of factors in its favour. It uses modern thinking and technology to build on skills, knowledge and experience that have been tested over time, and speaks to deep-seated human instincts: the value of distinctiveness, a pride in quality and the worth of craftsmanship. Whatever changes may be coming, the history of the sector suggests that craft professionals will find ways to re-think and re-invent their practice to adapt to a changing world, and to allow craft to flourish.

8. Appendix 1: Makers from England

The phone survey methodology was expressly designed to give large enough samples of makers at the 'nation' level to be able to analyse their results separately. (The number of retailers, educators, writers and academics surveyed meant that only a UK-wide analysis was possible for them.)

There are few statistically significant differences between the four nations of the UK. There are, however, some minor variations. This appendix includes tables comparing the responses from the 1,001 makers in England with the UK weighted average for each question. Before that we look at some of the more interesting findings for England.

8.1 Demographic profile

This first section looks at some of the key demographic indicators for makers.

Gender: In England, 69.3% of makers were female (UK 68.6%).

Age: The average age of makers is 49.4 years

Ethnicity: Makers from England described their ethnicity as:

- 82.5% White British (compared with 81.0% in UK)
- 9.8% White Other

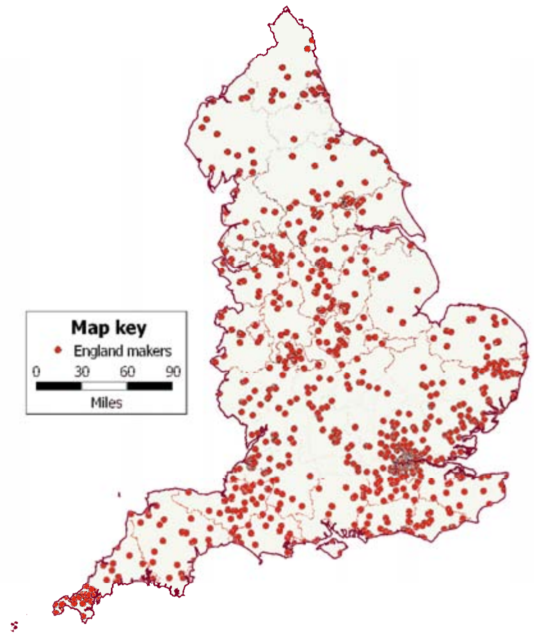
National identity: 68.3% of makers described their national identity as British, 23.7% chose English, and 1.6% said Welsh.

Disability: In England, 12.6% of makers described themselves as dyslexic (11.5% UK), while 4.7% described themselves as disabled, excluding dyslexia (4.1% UK).

8.2 Survey respondents

The respondents to the phone survey came from across England, but with greater concentrations in and around London, in the West Country (especially Cornwall) and in parts of East Anglia.[43]

Figure 46 Location of phone survey respondents from England



Source: BOP Consulting (2011)

[43] There were three respondents from the Channel Islands, which are not shown on the map.

8.3 Makers' profiles

In England, the proportion of people in each of the four profile groups is very similar to their share in the UK craft community as a whole. Craft careerists represent the largest group among the four.

Figure 47 Proportion in each profile group

		Craft qualifications: First or second degree	Craft qualifications: Other or no qualification
Contemporary craft-making as a first career	Yes	'Craft careerists' (38.8%)	'Artisans' (11.6%)
	No	'Returners' (23.8%)	'Career changers' (25.9%)

Source: BOP Consulting (2011)

8.4 Makers' businesses

The top six materials used by respondents in England (multiple responses were allowed) were:

Figure 48 Six most commonly used materials

Materials used	England %	UK %
Ceramics	26.6%	25.7% (rank 1^{st})
Textiles (exc. weaving)	23.6%	22.9% (2^{nd})
Jewellery	19.9%	20.0% (3^{rd})
Other metal (exc. jewellery and silver)	12.7%	12.1% (4^{th})
Wood (exc. furniture)	10.2%	10.7% (5^{th})
Glass	10.2%	10.3% (6^{th})

Source: BOP Consulting (2011)

Education level: 62.5% of makers in England have a craft-related degree (UK 60.8%) while 13.1% have no craft qualifications (UK 15.5%).

Hours worked: Makers in England spent 38.4 hrs a week on their craft-related activities, of which 26.4 hrs were spent designing and making craft objects (UK: 38.9 hrs in total, with 26.7 hrs spent designing and making)

Workplace: 66.1% of makers in England work from home (UK 65.9%)

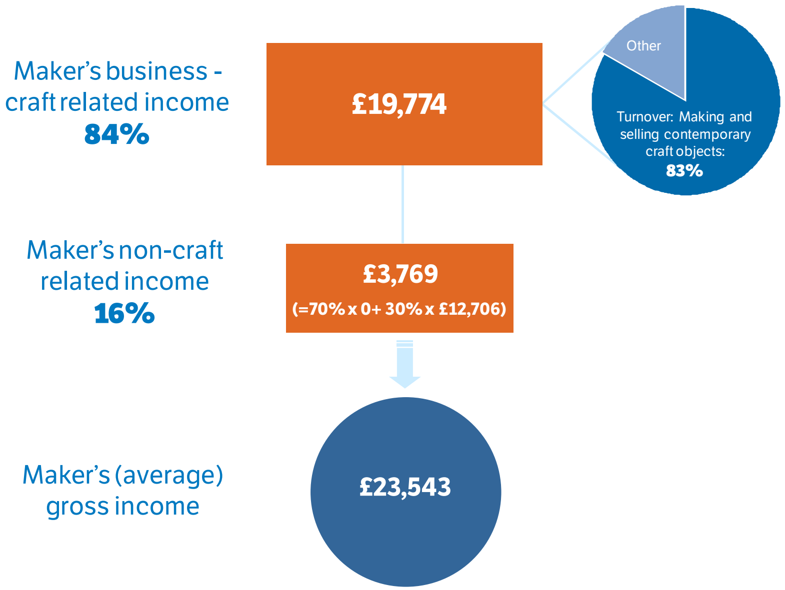
Business status: 88.9% of makers in England are sole traders (UK 87.7%)

Tourism was less important to makers in England than in the rest of the UK.

The average gross income of makers in England was £23,543. Of this, £19,974 was derived from craft-related income. In turn, 83% of this came from sales of contemporary craft objects.

Makers received another £3,769 on average from non-craft related income such as part-time work or pensions.

Figure 49 England: Makers' average gross income, 2010



Source: BOP Consulting (2011)

The average estimated net profit for a maker in England was calculated to be £6,239 (UK: £6,231). For full-timers in England the average was £8,648, for part-timers it was £3,048.

8.5 Wider issues in the craft sector

Other aspects of craft-making researched included:

Use of digital technology in practice and/or production: In England, 55.7% did so (UK 56.5%), most frequently for designing products.

Have you changed your practice in response to environmental concerns? 31.3% of makers in England had done so (UK 31.4%). The most common change was to source more environmentally sustainable or sensitive materials.

Do you export your products? 28.2% of makers in England had exported work in 2010 (UK 28.4%).

Use of public bodies: 15.0% of respondents had used the services of the Crafts Council in 2010, while 7.6% had used those of Arts Council England.[44]

Prospects for business: In all, 51.4% of England makers expected their contemporary craft sales to grow either considerably or slightly over the next three years (52.1% in UK).

[44] This question asked specifically about national agencies. Regional organisations or guilds were not included. In addition, almost half the interviews in England were deliberately conducted with makers not on the Crafts Council's database to ensure diverse results. A fuller discussion can be found in the methodology appendix.

MQ1-4 were ‘filter’ questions designed to establish that the respondent is a maker, is working in contemporary craft and is currently active. They were phrased to ensure that makers who might not readily identify themselves as having craft businesses were included.

MQ5. What type of business do you have?
Read out - Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Sole trader	87.7	88.9	890
Partnership	5.8	4.7	47
Limited liability partnership	1.8	1.8	18
Private company limited by shares	2.9	3.0	30
Private company limited by guarantee	0.1	0.1	1
Co-operative	0.4	0.4	4
Other	1.3	1.1	11
Total	100.0	100.0	1,001

MQ6. Do you employ other people?
Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Yes	16.4	34.5	39
No	83.6	65.5	74
Total	100.0	100.0	113

Note: Based on 113 respondents that are not sole traders

MQ7. How many full-time equivalent people work for your business, excluding yourself?

	UK	England	
	Percentage	Percentage	Frequency
0	96.1	96.2	947
1 - 2	2.0	2.1	21
3 - 5	1.2	1.0	10
5 - 8	0.5	0.5	5
>9	0.2	0.1	1
Total	100.0	100.0	984
Total Obs.			1,001
Non-response rate (%)			1.7

MQ8. What was your total craft-related turnover before tax in 2010?

	UK	England
Average	£19,827	£19,774
Median	£10,750	£10,750

Note: This question refers to income from all craft related activities, hence it has been treated as 'craft- related income' in the document.

Craft-related income (bands)	Percentage	Percentage	Frequency
Up to £10,000	37.1	28.6	283
£10,001-£20,000	43.2	51.2	506
£20,001-£30,000	6.8	7.1	70
£30,001-£50,000	5.3	6.0	59
£50,001-£100,000	5.0	6.6	65
More than £100,000	2.6	0.5	5
Total	100.0	100.0	988
Total Obs			1,001
Non-response rate (%)			1.3

MQ9. Did you have any non craft-related income in 2010?

Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Yes	43.8	43.3	433
Did not provide information on non craft-related income	*19.8*	*19.2*	*192*
Provided information on non craft-related income	*24.0*	*24.1*	*241*
No	56.3	56.7	568
Total	100.0	100.0	1001

MQ10. How much was this in 2010?

Overall sample	UK	England
Average	£3,658	£3,769
Among makers who answered 'yes' to the prior question		
Average	£12,284	£12,706
Median	£8,000	£8,000

MQ11. What are your sources of non-craft income?

Read out - Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Teaching or lecturing at an FE/HE institution (but not in art/craft/design)	8.7	9.0	39
Teaching in a school (but not in art/craft/design)	4.2	4.2	18
Retirement income (e.g. pensions)	21.6	21.9	95
Support from partner or family	1.6	1.6	7
Other private income	14.4	15.7	68
Other full-time job	12.3	11.8	51
Other part-time job	44.3	43.4	188

Note: Only applicable for makers who answered 'yes' to question MQ9

MQ11 Other jobs (category)

	UK	England	
	Percentage	Percentage	Frequency
Other full-time job			
Design	16.3	17.6	9
Hospitality	6.7	5.9	3
Jewellery	1.4	2.0	1
Museums, libraries and archives	0.4	0.0	
Retail	2.3	2.0	1
Teaching	9.5	9.8	5
Other	56.5	54.9	28
Refused	7.0	7.8	4
Total	100.0	100.0	51
Other part-time job			
Design	7.3	8.0	15
Hospitality	9.1	8.5	16
Jewellery	0.8	0.5	1
Museums, libraries and archives	2.4	2.1	4
Retail	8.8	8.5	16
Teaching	15.1	17.0	32
Other	53.6	53.2	100
Refused	3.0	2.1	4
Total	100.0	100.0	188

MQ12a. What type of craft related activities do you undertake?
Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Making and selling contemporary craft objects	95.8	96.7	968
Making and selling heritage craft objects	3.6	2.9	29
Teaching or lecturing in art/craft/design at an FE/HE institution	12.3	12.9	129
Teaching art/craft/design in a school	7.2	7.7	77
Teaching craft to less formal groups e.g. evening classes, workshops	26.1	26.1	261
Writing professionally about craft	4.5	4.8	48
Being a craft-maker in residence	1.8	1.8	18
Work for other business or sectors using craft skills and knowledge	3.8	4.1	41
Owning, running or working in a commercial gallery or craft shop	3.8	2.9	29
Working in a public museum or gallery (including in the museum shop)	1.8	2.0	20
Running or organising craft events such as exhibitions or fairs	4.7	4.5	45
Curating exhibitions	2.8	2.8	28
Other craft-related activity	5.7	5.3	53

Note: Percentages for England based on 1,001 respondents

MQ12b. What percentage of your craft-related turnover in 2010 came from each of these strands?

	UK Average (%)	England Average (%)
Making and selling contemporary craft objects	77.8	78.0
Making and selling heritage craft objects	1.2	0.9
Teaching or lecturing in art/craft/design at an FE/HE institution	4.2	4.1
Teaching art/craft/design in a school	2.5	2.8
Teaching craft to less formal groups e.g. evening classes, workshops	8.2	8.8
Writing professionally about craft	0.3	0.3
Being a craft-maker in residence	0.3	0.2
Work for other business or sectors using craft skills and knowledge	1.2	1.4
Owning, running or working in a commercial gallery or craft shop	1.1	0.7
Working in a public museum or gallery (including in the museum shop)	0.3	0.3
Running or organising craft events such as exhibitions or fairs	0.4	0.3
Curating exhibitions	0.1	0.1
Other craft-related activity	2.3	2.2
Total	100.0	100.0

MQ13. What percentage of your turnover from selling contemporary craft objects in 2010 came from work exported outside the UK?

	UK	England	
	Percentage	Percentage	Frequency
0	71.6	71.8	684
>0-25	21.7	21.8	208
>25-50	3.9	3.7	35
>50-75	1.5	1.6	15
>75-100	1.3	1.1	10
Total	100.0	100.0	952
Total Obs			1,001
Non-response rate (%)			4.9

MQ14. What was your approximate net profit (before tax) for your craft-related work in 2010?

	UK	England
Average	£6,231	£6,239
Median	£1,000	£2,000

	Percentage	Percentage	Frequency
Negative or no profit	13.0	13.8	136
£1-£2,500	46.3	47.4	468
£2,501-£5,000	10.9	8.0	79
£5,001-£10,000	12.1	13.0	128
£10,001-£20,000	8.9	9.0	89
More than £20,000	8.7	8.9	88
Total	100.0	100.0	988
Total Obs			1,001
Non-response rate (%)			1.3

MQ15. Which fields do you work in?

	UK	England	
	Percentage	Percentage	Frequency
Jewellery	20.0	19.9	199
Silver	7.1	6.9	69
Other metal (excluding jewellery and silver)	12.1	12.7	127
Ceramics	25.7	26.6	266
Textiles (including knitting and embroidery, but excluding weaving)	22.9	23.6	236
Weaving	1.9	1.7	17
Leather	2.0	2.1	21
Wood (excluding furniture)	10.7	10.2	102
Furniture	5.9	5.8	58
Stone	2.7	2.6	26
Glass	10.3	10.2	102
Graphic craft (including calligraphy, sign writing, and bookbinding)	2.5	2.3	23
Paper (excluding graphic craft)	4.0	4.1	41
Toys and automata	0.5	0.5	5
Synthetic materials (including plastics)	2.2	2.3	23
Digital	1.2	1.1	11
Mixed media	3.7	3.3	33
Prints and printmaking	0.8	0.9	9
Photography	0.5	0.4	4
Millinery	0.4	0.2	2
Sculpture	1.0	1.0	10
Painting	1.9	1.7	17
Mosaic	0.9	1.1	11
Fine Art	0.2	0.0	
Other	10.1	10.3	103

Note: Percentages for England based on 1,001 respondents

	UK	England
Number of different materials used (average)	1.5	1.5

MQ16. In which year did you start working professionally as a craft-maker?

	UK	England	
	Percentage	Percentage	Frequency
1940's	0.2	0.2	2
1950's	1.0	1.2	12
1960's	3.0	3.3	33
1970's	10.6	11.0	108
1980's	15.0	15.1	149
1990's	21.3	21.3	210
2000's	43.4	43.0	424
2010's	5.6	4.9	48
Total	100.0	100.0	986
Total Obs			1,001
Non-response rate (%)			1.5

	UK	England
Average years	16.0	16.5
Median	12.0	13.0

MQ17. How many hours a week, on average, in 2010 did you spend...?

	UK	England
	Average	Average
Designing and making your own craft objects	26.7	26.4
Selling of your craft objects	6.6	6.4
Using your craft skills and knowledge working in other sectors	5.6	5.7
Total average hours	38.9	38.4

MQ18. Where do you primarily carry out your craft practice?

	UK	England	
	Percentage	Percentage	Frequency
Space in room(s) in own home	21.3	20.4	204
Formal workshop on home premises	44.6	45.7	457
Individual workspace (away from home): rented	17.3	17.2	172
Individual workspace (away from home): owned	3.5	3.1	31
Shared workspace: rented	7.7	8.0	80
Shared workspace: owned	0.7	0.6	6
Client's site (inc. manufacturer's premises)	0.9	0.8	8
School or FE institution	1.1	1.3	13
HE institution or fabrication lab	0.5	0.5	5
Other	2.5	2.5	25
Total	100.0	100.0	1,001
			252

MQ19. Do you rent space within dedicated artists' studios?

Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Yes	56.4	57.1	144
No	43.6	42.9	108
Total	100.0	100.0	252

Note: Applicable to those makers who rent an individual or shared workspace, according to the prior question

MQ20. How much did you spend approximately in 2010 on buying materials, goods and supplies from other companies, including business services such as design and marketing?

	UK	England
Average	£5,287	£5,409
Median	£2,500	£2,500

MQ21. How important is tourism to your business?[45]
Read out - Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Very important	17.8	13.8	138
Fairly important	25.4	24.4	244
Not very important	29.1	30.8	308
Unimportant	27.6	31.1	311
Total	100.0	100.0	1,001

MQ22a. Which ways do you sell your work?
Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Commissions from general public	42.5	42.0	420
Commissions from businesses (e.g. architects, designers)	17.8	17.6	176
Commissions from institutions (e.g. museums)	12.7	12.0	120
Direct to public from studio/workshop/home	35.9	36.3	363
Through a commercial gallery or exhibition	54.8	57.1	572
Through a publicly funded gallery or exhibition	22.8	22.4	224
Through a craft shop	12.2	9.8	98
Through craft fairs	40.6	42.5	425
Through street markets	4.4	4.2	42
Direct to retailers (other than galleries)	17.6	17.8	178
Through your business website	29.8	29.7	297
Through a third-party website	12.7	13.1	131
Through social media (e.g. Facebook and Twitter)	3.0	2.5	25
Word of mouth	2.3	2.7	27
Other	5.6	5.4	54
Don't sell at the moment	0.6	0.7	7
Did not choose any selling channel	0.3	0.1	1

Note: Percentages for England based on 1,001 respondents

[45] Owing to an editing error in the questionnaire, respondents were not given the option 'neither important nor unimportant' for this question

MQ22b. Which is the single most important in terms of the value of sales?

	UK	England	
	Percentage	Percentage	Frequency
Commissions from general public	12.7	12.7	127
Commissions from businesses (e.g. architects, designers)	3.6	3.9	39
Commissions from institutions (e.g. museums)	2.6	2.2	22
Direct to public from studio/workshop/home	11.0	10.9	109
Through a commercial gallery or exhibition	18.5	19.0	190
Through a publicly funded gallery or exhibition	3.0	2.8	28
Through a craft shop	2.7	1.9	19
Through craft fairs	14.4	15.0	150
Through street markets	0.6	0.6	6
Direct to retailers (other than galleries)	4.5	4.1	41
Through your business website	4.7	5.2	52
Through a third-party website	1.1	0.7	7
Through social media (e.g. Facebook and Twitter)	0.1	0.1	1
Word of mouth	1.1	1.3	13
Other	3.7	3.6	36
Did not answer	15.6	15.3	153
Total	100.0	100.0	1,001

MQ23. What percentage of all your craft-related sales does MQ22b account for?

	UK	England
	Average %	Average %
Commissions from general public	65.1	64.4
Commissions from businesses (e.g. architects, designers)	65.7	64.8
Commissions from institutions (e.g. museums)	61.9	58.7
Direct to public from studio/workshop/home	67.8	68.6
Through a commercial gallery or exhibition	63.0	62.6
Through a publicly funded gallery or exhibition	65.4	67.6
Through a craft shop	67.1	66.2
Through craft fairs	64.5	64.0
Through street markets	61.9	61.7
Direct to retailers (other than galleries)	69.1	68.6
Through your business website	63.2	64.7
Through a third-party website	63.2	62.1
Through social media (e.g. Facebook and Twitter)	26.4	20.0
Word of mouth	70.1	70.7
Other	67.5	66.1

MQ24. How has the share changed over the last three years (or since you've been trading) for each of your sales routes?
Read out - Mark one box per row

Percentage

UK	Grown considerably	Grown slightly	Stayed steady	Declined slightly	Declined considerably	Total
Commissions from general public	8.0	22.0	39.5	18.3	12.1	100.0
Commissions from businesses (e.g. architects, designers)	7.1	25.6	39.0	12.3	16.0	100.0
Commissions from institutions (e.g. museums)	8.8	17.3	46.6	15.4	11.8	100.0
Direct to public from studio/workshop/home	9.9	21.7	40.4	16.8	11.3	100.0
Through a commercial gallery or exhibition	6.9	18.3	38.5	20.6	15.8	100.0
Through a publicly funded gallery or exhibition	3.3	16.6	45.4	20.6	14.0	100.0
Through a craft shop	2.0	19.3	45.4	21.6	11.8	100.0
Through craft fairs	8.0	18.4	33.8	21.8	18.2	100.0
Through street markets	5.4	10.7	49.1	16.0	18.8	100.0
Direct to retailers (other than galleries)	12.4	21.9	33.0	19.9	12.9	100.0
Through your business website	11.8	28.7	44.6	10.0	4.8	100.0
Through a third-party website	7.6	26.9	45.1	14.9	5.5	100.0
Through social media (e.g. Facebook and Twitter)	21.1	44.6	25.6	5.0	3.8	100.0
Word of mouth	22.6	20.0	33.7	6.7	17.0	100.0
Other	13.5	19.5	44.3	13.3	9.4	100.0
England						
Commissions from general public	8.3	21.4	39.9	19.0	11.4	100.0
Commissions from businesses (e.g. architects, designers)	8.0	27.8	35.8	10.8	17.6	100.0
Commissions from institutions (e.g. museums)	8.3	17.5	45.8	15.8	12.5	100.0
Direct to public from studio/workshop/home	9.9	22.4	40.9	15.2	11.6	100.0
Through a commercial gallery or exhibition	7.0	18.4	38.8	20.5	15.4	100.0
Through a publicly funded gallery or exhibition	4.0	15.2	46.9	20.1	13.8	100.0
Through a craft shop	2.0	18.4	46.9	20.4	12.2	100.0
Through craft fairs	8.0	19.5	34.6	20.9	16.9	100.0
Through street markets	4.8	11.9	52.4	14.3	16.7	100.0
Direct to retailers (other than galleries)	13.5	20.2	32.6	21.4	12.4	100.0
Through your business website	12.1	28.3	45.1	9.8	4.7	100.0
Through a third-party website	8.4	26.7	44.3	16.8	3.8	100.0
Through social media (e.g. Facebook and Twitter)	20.0	52.0	16.0	8.0	4.0	100.0
Word of mouth	23.1	23.1	30.8	7.7	15.4	100.0
Other	14.2	17.9	45.3	13.2	9.4	100.0

MQ25. What percentage of your turnover in 2010 from contemporary craft sales comes from...?

	UK	England
	Average %	Average %
All non-commissioned work for general public sale	49.0	49.0
All commissioned work	51.0	51.0
Total	100.0	100.0
Obs		954
Total Obs		1,001
Non-response rate (%)		4.7

MQ26. How has the percentage of your contemporary craft turnover from commissioned work changed over the last three years (or since you've been trading)...?
Read out - Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Increased significantly	9.2	9.6	45
Increased slightly	21.7	21.4	100
Stayed roughly the same	41.5	42.1	197
Decreased slightly	13.2	13.0	61
Decreased significantly	8.6	7.9	37
Don’t know	5.9	6.0	28
Total	100.0	100.0	468

Note: Based on 468 respondents who have had work commissioned

MQ27. Has your work ever been bought by a public collection?
Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Yes	28.7	28.6	286
No	68.3	68.6	687
Don't know	3.1	2.8	28
Total	100.0	100.0	1,001

MQ28. And has your work ever been re-sold by its original purchaser?
Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Yes	20.0	20.3	203
No	40.6	41.2	412
Don't know	39.4	38.6	386
Total	100.0	100.0	1,001

MQ29. How do you expect your contemporary craft sales to change over the next three years?
Read out - Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Grow considerably	17.2	17.7	177
Grow slightly	34.9	33.7	337
Stay steady	21.4	21.7	217
Decline slightly	7.6	7.5	75
Decline considerably	4.6	4.7	47
Don't know	12.8	13.1	131
Not applicable	1.5	1.7	17
Total	100.0	100.0	1,001

MQ30. Have you changed your practice in the last three years (or since you've been trading) in response to environmental concerns?
Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Yes	31.4	31.3	313
No	68.6	68.7	688
Total	100.0	100.0	1,001

MQ31. In what areas have you changed your practice in response to environmental concerns?
Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Source more environmentally sensitive or sustainable materials	16.4	16.8	168
Use more environmentally sensitive or sustainable production processes	10.4	10.7	107
Choose local suppliers to reduce transport miles	6.4	6.3	63
Choose suppliers with more environmentally sustainable practices	3.5	3.6	36
Choose distributors/retailers with more environmentally sustainable practices	2.2	2.3	23
Recycling	5.0	4.4	44
Other	4.9	4.2	42

Note: Percentages for England based on 1,001 respondents

MQ32. And have you changed your practice in the last three years in response to other ethical concerns?
If so what have you done? (e.g. use fairtrade products)
Specify under 'Other' below

	UK	England	
	Percentage	Percentage	Frequency
Yes	14.0	13.7	137
No	86.0	86.3	864
Total	100.0	100.0	1,001

MQ33. Do you use digital technology in your practice or production?
Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Yes	56.5	55.7	558
Yes – for designing	52.4	51.8	289
Yes – for making	34.4	36.2	202
Yes – other	47.0	47.1	263
Photographing	9.8	8.8	*49*
Marketing	17.2	15.4	*86*
Communications	1.0	1.3	*7*
Other	20.6	21.7	*121*
No	43.6	44.3	443
Total	100.0	100.0	1,001

MQ34. How much do you use digital technology in your practice or production?
Read out - Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
All the time	28.6	29.4	164
Often	28.9	28.9	161
Sometimes	17.7	16.8	94
Occasionally	24.9	24.9	139
Total	100.0	100.0	558

Note: Applicable to those makers who answered 'yes' in the prior question

MQ35. In 2010, in relation to your craft practice, did you make use of the services provided by any of the following public bodies?
Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Crafts Council	13.9	15.0	150
Arts Council England	5.7	7.6	76
Arts Council of Wales	1.5	0.2	2
Craft Scotland	5.1	0.0	
Creative Scotland	2.2	0.0	
Craft Northern Ireland	1.3	0.0	
Arts Council of Northern Ireland	1.3	0.0	
Crafts Council of Ireland	0.6	0.0	
None of these	75.9	81.3	814

Note: Percentages for England based on 1,001 respondents

MQ36. What qualifications and training, including equivalent non-UK qualifications, have you completed that are particularly relevant to craft work?

Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Art/design/craft degree at college or university (BA, BSc)	56.0	57.3	574
Art/design/craft postgraduate degree at college or university (MA/MSc/PhD)	20.2	20.5	205
Foundation course in art/design/craft	16.2	18.1	181
A level and/or O level/GCSE in art/design/craft	16.9	18.1	181
Formal apprenticeship	5.5	6.1	61
Working with experienced makers (not as formal apprenticeship)	6.1	5.6	56
Part-time and short courses	8.9	9.2	92
Adult education classes	5.9	6.7	67
Other craft training	13.8	14.2	142
N/A - No training	15.5	13.1	131

Note: Percentages for England based on 1,001 respondents

	UK	England	
	Percentage	Percentage	Frequency
First or second degree	60.8	62.5	626
Other qualifications	23.7	24.4	244
None	15.5	13.1	131
Total	100.0	100.0	1,001

MQ37. What year did you graduate from your most recent degree programme?

	UK	England	
	Percentage	Percentage	Frequency
1950's	1.1	1.3	8
1960's	5.2	5.6	35
1970's	13.9	13.5	84
1980's	15.4	15.6	97
1990's	23.5	24.2	150
2000's	36.4	36.1	224
2010's	4.5	3.7	23
Total	100.0	100.0	621
Not applicable			375
Total Obs			626
Non-response rate (%)			0.8

Note: Applicable to those makers who hold a first or second degree

	UK	England
Average years	18.2	18.5
Median	15.0	15.0

MQ38. Who supplies the general business skills (such as bookkeeping, website design and marketing) to run your business?
Do not read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
You	88.9	89.3	894
Your partner/family member	13.8	13.5	135
Friends	2.8	2.7	27
Business partner	1.8	1.6	16
Employee	2.2	2.3	23
Outsourced to professionals	20.2	21.5	215
Other	1.0	1.1	11

Note: Percentages for England based on 1,001 respondents

MQ39. Have you had any training in general business skills since you started your business?
Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Yes	42.7	40.7	407
Yes - formal training	*26.7*	*24.9*	*249*
Yes - informal training	*20.8*	*20.8*	*208*
No	57.3	59.3	594
Total	100.0	100.0	1,001

MQ40. Are there specific business skills you want to develop?

	UK	England	
	Percentage	Percentage	Frequency
Marketing (inc. web design)	24.7	24.7	247
IT skills	5.9	6.4	64
General business skills	6.2	6.5	65
Craft technology skills	1.1	1.1	11
Bookkeeping/accounting	5.6	5.1	51
Other	3.7	3.7	37
None	52.8	52.5	526
Total	100.0	100.0	1,001

MQ41. How do you think your business might change in the next three years?
Read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Use new craft-making technologies	36.7	38.4	384
Use new or different materials	49.1	51.7	518
Develop new or different types of product	63.4	64.9	650
More collaborative or partnership working	39.7	41.3	413
Find new markets	58.5	61.0	611
Work more with other sectors as a consultant or practitioner	28.1	29.9	299
Stop craft-making	5.6	5.8	58
Don't expect any change	8.1	7.4	74
Other	13.2	11.9	119

MQ42. If craft is your main career, was it also your first career?
Mark one box only

	UK	England	
	Percentage	Percentage	Frequency
Yes	50.1	50.3	504
No	49.9	49.7	497
Total	100.0	100.0	1,001

Q45. Gender

	UK	England	
	Percentage	Percentage	Frequency
Male	31.4	30.7	307
Female	68.6	69.3	694
Total	100.0	100.0	1,001

Q46. Which age group do you fall into?

	UK	England	
	Percentage	Percentage	Frequency
16-24	1.5	1.3	13
25-34	12.7	11.5	115
35-44	20.8	21.0	210
45-54	25.1	25.3	253
55-64	25.5	25.9	259
65 and over	13.2	14.1	141
Declined to answer	1.3	1.0	10
Total	100.0	100.0	1,001

Q47. Do you consider yourself dyslexic and/or disabled?

Do not read out - Mark all that apply

	UK	England	
	Percentage	Percentage	Frequency
Yes- dyslexic	11.5	12.6	126
Yes – disabled (excluding dyslexia)	4.1	4.7	47
No	83.4	82.0	821
Declined to answer	1.5	1.3	13

Q51. Were you born in the UK?

	UK	England	
	Percentage	Percentage	Frequency
Yes	86.3	84.9	850
Declined to answer	1.5	1.4	14
Other country	12.2	13.7	137
Total	100.0	100.0	1,001

Q52. How would you describe your national identity?

	UK	England	
	Percentage	Percentage	Frequency
English	18.8	23.7	237
Welsh	3.3	1.6	16
Scottish	8.5	1.0	10
Northern Irish	1.6	0.2	2
British	62.5	68.3	684
Irish	1.4	0.3	3
Other	2.3	1.6	16
Declined to answer	1.7	3.3	33
Total	100.0	100.0	1,001

Q53. What is your ethnic group?
Read out – mark one box only

	UK	England	
	Percentage	Percentage	Frequency
White British	81.0	82.5	826
White Irish	2.4	0.5	5
White Other	10.0	9.8	98
Black/black British	0.5	0.6	6
Asian/Asian British	0.7	0.8	8
Mixed	0.8	0.9	9
Declined to answer	3.2	2.9	29
Other	1.5	2.0	20
Total	100.0	100.0	1,001

9. Appendix 2: Makers from Scotland

The phone survey methodology was expressly designed to give large enough samples of makers at the 'nation' level to be able to analyse their results separately. (The number of retailers, educators, writers and academics surveyed meant that only a UK-wide analysis was possible for them.)

There are few statistically significant differences between the four nations of the UK. There are, however, some minor variations. This appendix includes tables comparing the responses from the 361 makers in Scotland with the UK weighted average for each question. Before that we look at some of the more interesting findings for Scotland.

9.1 Demographic profile

This first section looks at some of the key demographic indicators for makers in Scotland.

Gender: In Scotland 68.4% of makers are female (UK 68.6%)

Age: Average age is 45.4 years

Ethnicity: Makers from Scotland described their ethnicity as follows:

- White British 79.2% (compared with 81.0% in UK).
- White Other 13.3%

National identity: 48.8% of makers described their national identity as Scottish, 42.4% chose British, and 3.6% said English

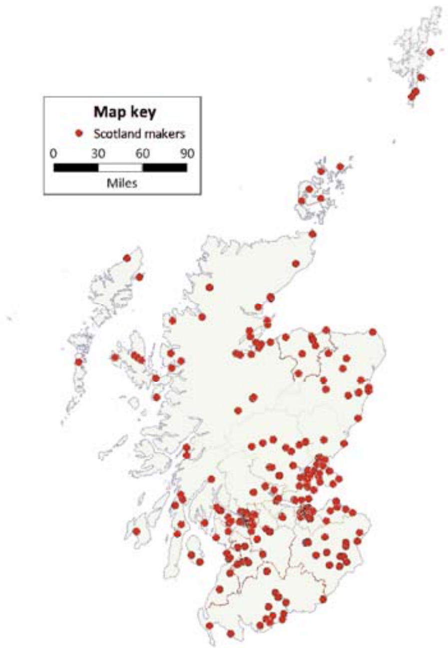
Disability: In Scotland, 10.0% of makers said they were dyslexic (11.5% UK), while 4.4% described themselves as disabled, excluding dyslexia (4.1% UK).

Language: Only one maker spoke Gaelic fluently; 15 had some fluency in the language.

9.2 Survey respondents

The respondents to the phone survey came from across Scotland, including the Western Isles, Orkney and Shetland. There were larger clusters of respondents in Glasgow, Edinburgh and Fife.

Figure 50 Location of phone survey respondents from Scotland



Source: BOP Consulting (2011)

9.3 Makers' profiles

In Scotland, the proportion of 'career changers' – people who have moved into craft-making from other careers but who do not have a degree in art, craft or design is a little higher than the UK as a whole. 'Craft careerists' remain the largest group, however.

Figure 51 Proportion in each profile group

		Craft qualifications	
		First or second degree	Other or no qualification
Contemporary craft-making as a first career	Yes	'Craft careerists' (38.8%)	'Artisans' (12.2%)
	No	'Returners' (17.5%)	'Career changers' (31.6%)

Source: BOP Consulting (2011)

9.4 Makers' businesses

The top five materials used by respondents in Scotland (multiple responses were allowed) were:

Figure 52 Five most commonly used materials

Materials used	Scotland %	UK %
Jewellery	23.0%	20.0% (rank 3rd)
Textiles (exc. weaving)	21.1%	22.9% (2nd)
Ceramics	18.3%	25.7% (1st)
Wood (exc. furniture)	12.2%	10.7% (5th)
Glass	11.1%	10.3% (6th)

Source: BOP Consulting (2011)

Education level: 56.2% of makers in Scotland have a relevant degree (UK 60.8%) while 22.4% have no craft qualifications (UK 15.5%)

Hours worked: Makers in Scotland spent 40.8 hrs a week on their craft-related activities, of which 28.4 hrs were spent designing and making craft objects (UK average: 38.9 hrs, with 26.7 hrs designing and making)

Workplace: 65.4% of makers in Scotland work from home (UK 65.9%)

Business status: 85.6% of makers in Scotland are sole traders (UK 87.7%)

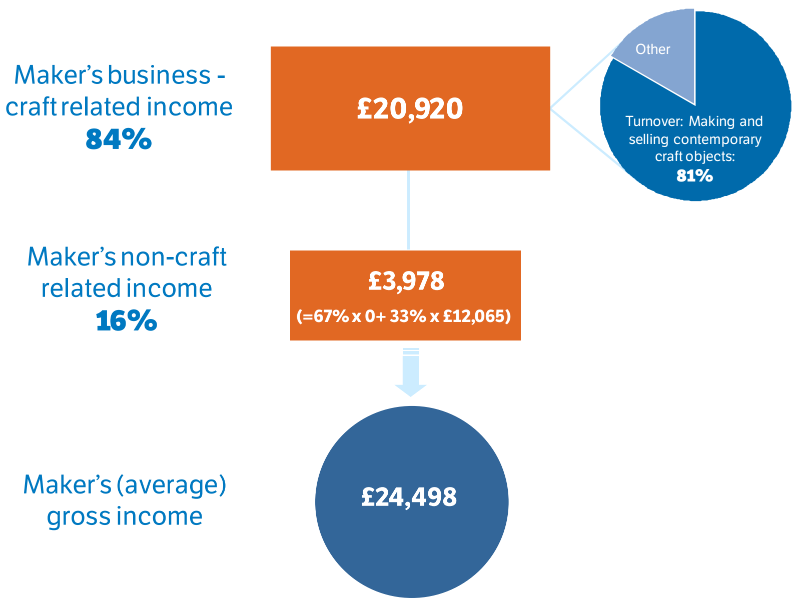
Tourism was very important to 30% of makers in Scotland, compared with 18% in the UK as a whole.

Makers in Scotland were more likely to use internet selling channels than were makers in the UK as a whole.

The average gross income of makers in Scotland was £24,498. Of this, £20,920 was derived from craft-related income. In turn, 81% of this came from sales of contemporary craft objects.

Makers received another £3,978 on average from non-craft related income such as part-time work or pensions.

Figure 53 Scotland: Makers' average gross income, 2010



Source: BOP Consulting (2011)

The average estimated net profit for a maker in Scotland was calculated to be £6,595 (UK: £6,231). For full-timers in Scotland the average was £7,673, for part-timers it was £4,329.

9.5 Wider issues in the craft sector

Other aspects of craft-making researched included:

Use of digital technology in practice and/or production: In Scotland, 61.8% did so (UK 56.5%), most frequently for designing products.

Have you changed your practice in response to environmental concerns? 31.3% of makers in Scotland had done so (UK 31.4%). The most common change was to source more environmentally sustainable or sensitive materials.

Do you export your products? 27.4% of makers in Scotland had exported work in 2010 (UK 28.4%)

Use of public bodies: 35.5% of respondents had used the services of Craft Scotland in 2010, while 15.0% had used Creative Scotland's services and 11.9% had used the Crafts Council's.

Prospects for business: In all, 56.5% of Scotland makers expected their contemporary craft sales to grow either considerably or slightly over the next three years (52.1% in UK).

MQ1-4 were 'filter' questions designed to establish that the respondent is a maker, is working in contemporary craft and is currently active. They were phrased to ensure that makers who might not readily identify themselves as having craft businesses were included.

MQ5. What type of business do you have?

Read out - Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Sole trader	87.7	85.6	309
Partnership	5.8	8.0	29
Limited liability partnership	1.8	2.5	9
Private company limited by shares	2.9	3.0	11
Private company limited by guarantee	0.1	0.0	
Co-operative	0.4	0.0	
Other	1.3	0.8	3
Total	100.0	100.0	361

MQ6. Do you employ other people?

Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	16.4	31.6	18
No	83.6	68.4	39
Total	100.0	100.0	57

Note: Based on 57 respondents that are not sole traders

MQ7. How many full-time equivalent people work for your business, excluding yourself?

	UK	Scotland	
	Percentage	Percentage	Frequency
0	96.1	95.2	340
1 - 2	2.0	2.0	7
3 - 5	1.2	2.2	8
5 - 8	0.5	0.3	1
>9	0.2	0.3	1
Total	100.0	100.0	357
Total Obs			361
Non-response rate (%)			1.1

MQ8. What was your total craft-related turnover before tax in 2010?

	UK	Scotland
Average	£19,827	£20,920
Median	£10,750	£10,000

Note: This question refers to income from all craft related activities, hence it has been treated as 'craft- related income' in the document.

Craft-related income (bands)	Percentage	Percentage	Frequency
Up to £10,000	37.1	72.5	261
£10,001-£20,000	43.2	9.2	33
£20,001-£30,000	6.8	5.8	21
£30,001-£50,000	5.3	4.2	15
£50,001-£100,000	5.0	6.4	23
More than £100,000	2.6	1.9	7
Total	100.0	100.0	360
Total Obs			361
Non-response rate (%)			0.3

MQ9. Did you have any non craft-related income in 2010?

Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	43.8	49.3	178
Did not provide information on non craft-related income	*19.8*	*24.4*	*88*
Provided information on non craft-related income	*24.0*	*24.9*	*90*
No	56.3	50.7	183
Total	100.0	100.0	361

MQ10. How much was this in 2010?

Overall sample	UK	Scotland
Average	£3,658	£3,978

Among makers who answered 'yes' to the prior question		
Average	£12,284	£12,065
Median	£8,000	£8,600

MQ11. What are your sources of non-craft income?

Read out - Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Teaching or lecturing at an FE/HE institution (but not in art/craft/design)	8.7	9.6	17
Teaching in a school (but not in art/craft/design)	4.2	4.5	8
Retirement income (e.g. pensions)	21.6	18.5	33
Support from partner or family	1.6	0.6	1
Other private income	14.4	11.8	21
Other full-time job	12.3	12.9	23
Other part-time job	44.3	48.3	86

Note: Only applicable for makers who answered 'yes' to question MQ9

MQ11 Other jobs (category)

	UK	Scotland	
	Percentage	Percentage	Frequency
Other full-time job			
Design	16.3	13.0	3
Hospitality	6.7	8.7	2
Jewellery	1.4	0.0	
Museums, libraries and archives	0.4	0.0	
Retail	2.3	0.0	
Teaching	9.5	8.7	2
Other	56.5	60.9	14
Refused	7.0	8.7	2
Total	100.0	100.0	23
Other part-time job			
Design	7.3	7.0	6
Hospitality	9.1	11.6	10
Jewellery	0.8	2.3	2
Museums, libraries and archives	2.4	3.5	3
Retail	8.8	12.8	11
Teaching	15.1	9.3	8
Other	53.6	48.8	42
Refused	3.0	4.7	4
Total	100.0	100.0	86

MQ12a. What type of craft related activities do you undertake?
Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Making and selling contemporary craft objects	95.8	93.1	336
Making and selling heritage craft objects	3.6	5.3	19
Teaching or lecturing in art/craft/design at an FE/HE institution	12.3	8.9	32
Teaching art/craft/design in a school	7.2	4.2	15
Teaching craft to less formal groups e.g. evening classes, workshops	26.1	24.1	87
Writing professionally about craft	4.5	3.6	13
Being a craft-maker in residence	1.8	0.8	3
Work for other business or sectors using craft skills and knowledge	3.8	1.7	6
Owning, running or working in a commercial gallery or craft shop	3.8	5.8	21
Working in a public museum or gallery (including in the museum shop)	1.8	0.6	2
Running or organising craft events such as exhibitions or fairs	4.7	3.6	13
Curating exhibitions	2.8	2.5	9
Other craft-related activity	5.7	6.4	23

Note: Percentages for Scotland based on 361 respondents

MQ12b. What percentage of your craft-related turnover in 2010 came from each of these strands?

	UK	Scotland
	Average (%)	Average (%)
Making and selling contemporary craft objects	77.8	79.3
Making and selling heritage craft objects	1.2	2.4
Teaching or lecturing in art/craft/design at an FE/HE institution	4.2	4.5
Teaching art/craft/design in a school	2.5	0.7
Teaching craft to less formal groups e.g. evening classes, workshops	8.2	6.1
Writing professionally about craft	0.3	0.3
Being a craft-maker in residence	0.3	0.0
Work for other business or sectors using craft skills and knowledge	1.2	0.7
Owning, running or working in a commercial gallery or craft shop	1.1	2.5
Working in a public museum or gallery (including in the museum shop)	0.3	0.3
Running or organising craft events such as exhibitions or fairs	0.4	0.4
Curating exhibitions	0.1	0.1
Other craft-related activity	2.3	2.6
Total	100.0	100.0

MQ13. What percentage of your turnover from selling contemporary craft objects in 2010 came from work exported outside the UK?

	UK	Scotland	
	Percentage	Percentage	Frequency
0	71.6	72.6	244
>0-25	21.7	21.7	73
>25-50	3.9	3.9	13
>50-75	1.5	0.6	2
>75-100	1.3	1.2	4
Total	100.0	100.0	336
Total Obs			361
Non-response rate (%)			6.9

MQ14. What was your approximate net profit (before tax) for your craft-related work in 2010?

	UK	Scotland
Average	£6,231	£6,595
Median	£1,000	£2,750

	UK Percentage	Scotland Percentage	Scotland Frequency
Negative or no profit	13.0	12.3	44
£1-£2,500	46.3	51.0	182
£2,501-£5,000	10.9	12.0	43
£5,001-£10,000	12.1	8.1	29
£10,001-£20,000	8.9	7.0	25
More than £20,000	8.7	9.5	34
Total	100.0	100.0	357
Total Obs			361
Non-response rate (%)			1.1

MQ15. Which fields do you work in?

	UK	Scotland	
	Percentage	Percentage	Frequency
Jewellery	20.0	23.0	83
Silver	7.1	9.4	34
Other metal (excluding jewellery and silver)	12.1	10.2	37
Ceramics	25.7	18.3	66
Textiles (including knitting and embroidery, but excluding weaving)	22.9	21.1	76
Weaving	1.9	2.5	9
Leather	2.0	1.9	7
Wood (excluding furniture)	10.7	12.2	44
Furniture	5.9	7.2	26
Stone	2.7	1.7	6
Glass	10.3	11.1	40
Graphic craft (including calligraphy, sign writing, and bookbinding)	2.5	3.3	12
Paper (excluding graphic craft)	4.0	3.9	14
Toys and automata	0.5	0.0	
Synthetic materials (including plastics)	2.2	2.2	8
Digital	1.2	1.7	6
Mixed media	3.7	2.5	9
Prints and printmaking	0.8	0.8	3
Photography	0.5	0.8	3
Millinery	0.4	1.4	5
Sculpture	1.0	0.8	3
Painting	1.9	1.7	6
Mosaic	0.9	0.3	1
Fine Art	0.2	0.6	2
Other	10.1	8.0	29

Note: Percentages for Scotland based on 361 respondents

	UK	Scotland
Number of different materials used (average)	1.5	1.5

MQ16. In which year did you start working professionally as a craft-maker?

	UK	Scotland	
	Percentage	Percentage	Frequency
1940's	0.2	0.3	1
1950's	1.0	0.3	1
1960's	3.0	2.5	9
1970's	10.6	9.0	32
1980's	15.0	14.4	51
1990's	21.3	20.0	71
2000's	43.4	43.7	155
2010's	5.6	9.9	35
Total	100.0	100.0	355
Total Obs			361
Non-response rate (%)			1.7
Average years	16.0	14.2	
Median	12.0	11.0	

MQ17. How many hours a week, on average, in 2010 did you spend...?

	UK	Scotland
	Average	Average
Designing and making your own craft objects	26.7	28.4
Selling of your craft objects	6.6	7.6
Using your craft skills and knowledge working in other sectors	5.6	4.8
Total average hours	38.9	40.8

MQ18. Where do you primarily carry out your craft practice?

	UK	Scotland	
	Percentage	Percentage	Frequency
Space in room(s) in own home	21.3	25.5	92
Formal workshop on home premises	44.6	39.9	144
Individual workspace (away from home): rented	17.3	16.3	59
Individual workspace (away from home): owned	3.5	5.5	20
Shared workspace: rented	7.7	8.6	31
Shared workspace: owned	0.7	1.7	6
Client's site (inc. manufacturer's premises)	0.9	0.6	2
School or FE institution	1.1	0.0	
HE institution or fabrication lab	0.5	0.3	1
Other	2.5	1.7	6
Total	100.0	100.0	361

MQ19. Do you rent space within dedicated artists' studios?

Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	56.4	62.2	56
No	43.6	37.8	34
Total	100.0	100.0	90

Note: Applicable to those makers who rent an individual or shared workspace, according to the prior question

MQ20. How much did you spend approximately in 2010 on buying materials, goods and supplies from other companies, including business services such as design and marketing?

	UK	Scotland
Average	£5,287	£4,873
Median	£2,500	£2,000

MQ21. How important is tourism to your business?[46]

Read out - Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Very important	17.8	29.9	108
Fairly important	25.4	27.7	100
Not very important	29.1	24.4	88
Unimportant	27.6	18.0	65
Total	100.0	100.0	361

MQ22a. Which ways do you sell your work?

Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Commissions from general public	42.5	44.0	159
Commissions from businesses (e.g. architects, designers)	17.8	17.5	63
Commissions from institutions (e.g. museums)	12.7	12.2	44
Direct to public from studio/workshop/home	35.9	36.8	133
Through a commercial gallery or exhibition	54.8	49.3	178
Through a publicly funded gallery or exhibition	22.8	22.7	82
Through a craft shop	12.2	18.6	67
Through craft fairs	40.6	35.7	129
Through street markets	4.4	6.1	22
Direct to retailers (other than galleries)	17.6	17.5	63
Through your business website	29.8	36.0	130
Through a third-party website	12.7	14.7	53
Through social media (e.g. Facebook and Twitter)	3.0	5.0	18
Word of mouth	2.3	2.5	9
Other	5.6	5.0	18
Don’t sell at the moment	0.6	0.0	0
Did not choose any selling channel	0.3	0.6	2

Note: Percentages for Scotland based on 361 respondents

[46] Owing to an editing error in the questionnaire, respondents were not given the option ‘neither important nor unimportant’ for this question

MQ22b. Which is the single most important in terms of the value of sales?

	UK	Scotland	
	Percentage	Percentage	Frequency
Commissions from general public	12.7	10.9	39
Commissions from businesses (e.g. architects, designers)	3.6	3.3	12
Commissions from institutions (e.g. museums)	2.6	2.2	8
Direct to public from studio/workshop/home	11.0	12.5	45
Through a commercial gallery or exhibition	18.5	17.8	64
Through a publicly funded gallery or exhibition	3.0	2.8	10
Through a craft shop	2.7	4.7	17
Through craft fairs	14.4	12.0	43
Through street markets	0.6	0.3	1
Direct to retailers (other than galleries)	4.5	5.8	21
Through your business website	4.7	3.6	13
Through a third-party website	1.1	3.1	11
Through social media (e.g. Facebook and Twitter)	0.1	0.0	0
Word of mouth	1.1	0.3	1
Other	3.7	4.5	16
Did not answer	15.6	16.2	58
Total	100.0	100.0	359

MQ23. What percentage of all your craft-related sales does MQ22b account for?

	UK	Scotland
	Average %	Average %
Commissions from general public	65.1	67.4
Commissions from businesses (e.g. architects, designers)	65.7	70.6
Commissions from institutions (e.g. museums)	61.9	62.1
Direct to public from studio/workshop/home	67.8	66.0
Through a commercial gallery or exhibition	63.0	63.5
Through a publicly funded gallery or exhibition	65.4	55.0
Through a craft shop	67.1	68.1
Through craft fairs	64.5	66.7
Through street markets	61.9	90.0
Direct to retailers (other than galleries)	69.1	72.9
Through your business website	63.2	55.0
Through a third-party website	63.2	63.5
Through social media (e.g. Facebook and Twitter)	26.4	–
Word of mouth	70.1	60.0
Other	67.5	76.4

MQ24. How has the share changed over the last three years (or since you've been trading) for each of your sales routes?

Read out - Mark one box per row

Percentage

UK	Grown considerably	Grown slightly	Stayed steady	Declined slightly	Declined considerably	Total
Commissions from general public	8.0	22.0	39.5	18.3	12.1	100.0
Commissions from businesses (e.g. architects, designers)	7.1	25.6	39.0	12.3	16.0	100.0
Commissions from institutions (e.g. museums)	8.8	17.3	46.6	15.4	11.8	100.0
Direct to public from studio/workshop/home	9.9	21.7	40.4	16.8	11.3	100.0
Through a commercial gallery or exhibition	6.9	18.3	38.5	20.6	15.8	100.0
Through a publicly funded gallery or exhibition	3.3	16.6	45.4	20.6	14.0	100.0
Through a craft shop	2.0	19.3	45.4	21.6	11.8	100.0
Through craft fairs	8.0	18.4	33.8	21.8	18.2	100.0
Through street markets	5.4	10.7	49.1	16.0	18.8	100.0
Direct to retailers (other than galleries)	12.4	21.9	33.0	19.9	12.9	100.0
Through your business website	11.8	28.7	44.6	10.0	4.8	100.0
Through a third-party website	7.6	26.9	45.1	14.9	5.5	100.0
Through social media (e.g. Facebook and Twitter)	21.1	44.6	25.6	5.0	3.8	100.0
Word of mouth	22.6	20.0	33.7	6.7	17.0	100.0
Other	13.5	19.5	44.3	13.3	9.4	100.0
Scotland						
Commissions from general public	7.5	23.8	41.3	14.4	13.1	100.0
Commissions from businesses (e.g. architects, designers)	4.8	20.6	50.8	14.3	9.5	100.0
Commissions from institutions (e.g. museums)	6.8	20.5	56.8	9.1	6.8	100.0
Direct to public from studio/workshop/home	8.6	19.5	42.2	24.2	5.5	100.0
Through a commercial gallery or exhibition	7.3	19.1	38.2	20.8	14.6	100.0
Through a publicly funded gallery or exhibition	0.0	22.0	41.5	22.0	14.6	100.0
Through a craft shop	0.0	28.4	44.8	14.9	11.9	100.0
Through craft fairs	9.3	14.7	29.5	27.1	19.4	100.0
Through street markets	4.6	4.6	45.5	18.2	27.3	100.0
Direct to retailers (other than galleries)	9.5	31.8	36.5	12.7	9.5	100.0
Through your business website	10.0	30.0	45.4	9.2	5.4	100.0
Through a third-party website	3.8	28.3	47.2	7.6	13.2	100.0
Through social media (e.g. Facebook and Twitter)	22.2	33.3	44.4	0.0	0.0	100.0
Word of mouth	0.0	0.0	0.0	0.0	100.0	100.0
Other	16.2	18.9	48.7	10.8	5.4	100.0

MQ25. What percentage of your turnover in 2010 from contemporary craft sales comes from...?

	UK	Scotland
	Average %	Average %
All non-commissioned work for general public sale	49.0	45.0
All commissioned work	51.0	55.0
Total	100.0	100.0
Obs		341
Total Obs		361
Non-response rate (%)		5.5

MQ26. How has the percentage of your contemporary craft turnover from commissioned work changed over the last three years (or since you've been trading)...?

Read out - Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Increased significantly	9.2	7.2	12
Increased slightly	21.7	24.0	40
Stayed roughly the same	41.5	43.7	73
Decreased slightly	13.2	12.0	20
Decreased significantly	8.6	7.8	13
Don't know	5.9	5.4	9
Total	100.0	100.0	167

Note: Based on 167 respondents that have had work commissioned

MQ27. Has your work ever been bought by a public collection?

Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	28.7	27.7	100
No	68.3	69.3	250
Don't know	3.1	3.0	11
Total	100.0	100.0	361

MQ28. And has your work ever been re-sold by its original purchaser?
Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	20.0	19.4	70
No	40.6	40.2	145
Don't know	39.4	40.4	146
Total	100.0	100.0	361

MQ29. How do you expect your contemporary craft sales to change over the next three years?
Read out - Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Grow considerably	17.2	15.5	56
Grow slightly	34.9	41.0	148
Stay steady	21.4	20.8	75
Decline slightly	7.6	8.0	29
Decline considerably	4.6	3.6	13
Don't know	12.8	10.5	38
Not applicable	1.5	0.6	2
Total	100.0	100.0	361

MQ30. Have you changed your practice in the last three years (or since you've been trading) in response to environmental concerns?
Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	31.4	31.3	113
No	68.6	68.7	248
Total	100.0	100.0	361

MQ31. In what areas have you changed your practice in response to environmental concerns?
Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Source more environmentally sensitive or sustainable materials	16.4	15.0	54
Use more environmentally sensitive or sustainable production processes	10.4	8.6	31
Choose local suppliers to reduce transport miles	6.4	6.4	23
Choose suppliers with more environmentally sustainable practices	3.5	2.8	10
Choose distributors/retailers with more environmentally sustainable practices	2.2	1.1	4
Recycling	5.0	7.2	26
Other	4.9	6.1	22

Note: Percentages for Scotland based on 361 respondents

MQ32. And have you changed your practice in the last three years in response to other ethical concerns? If so what have you done? (e.g. use fairtrade products)
Specify under 'Other' below

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	14.0	14.7	53
No	86.0	85.3	308
Total	100.0	100.0	361

MQ33. Do you use digital technology in your practice or production?
Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	56.5	61.8	223
Yes – for designing	52.4	52.5	117
Yes – for making	34.4	26.9	60
Yes – other	47.0	54.7	122
Photographing	9.8	13.5	*30*
Marketing	17.2	22.9	*51*
Communications	1.0	0.4	*1*
Other	20.6	17.9	*40*
No	43.6	38.2	138
Total	100.0	100.0	361

MQ34. How much do you use digital technology in your practice or production?
Read out - Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
All the time	28.6	26.5	59
Often	28.9	31.4	70
Sometimes	17.7	18.8	42
Occasionally	24.9	23.3	52
Total	100.0	100.0	223

Note: Applicable to those makers who answered 'yes' in the prior question

MQ35. In 2010, in relation to your craft practice, did you make use of the services provided by any of the following public bodies?
Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Crafts Council	13.9	11.9	43
Arts Council England	5.7	0.0	
Arts Council of Wales	1.5	0.0	
Craft Scotland	5.1	35.5	128
Creative Scotland	2.2	15.0	54
Craft Northern Ireland	1.3	0.0	
Arts Council of Northern Ireland	1.3	0.0	
Crafts Council of Ireland	0.6	0.0	
None of these	75.9	56.8	205

Note: Percentages for Scotland based on 361 respondents

MQ36. What qualifications and training, including equivalent non-UK qualifications, have you completed that are particularly relevant to craft work?

Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Art/design/craft degree at college or university (BA, BSc)	56.0	51.8	187
Art/design/craft postgraduate degree at college or university (MA/MSc/PhD)	20.2	19.4	70
Foundation course in art/design/craft	16.2	9.1	33
A level and/or O level/GCSE in art/design/craft	16.9	12.7	46
Formal apprenticeship	5.5	3.0	11
Working with experienced makers (not as formal apprenticeship)	6.1	5.5	20
Part-time and short courses	8.9	7.5	27
Adult education classes	5.9	2.2	8
Other craft training	13.8	14.4	52
N/A - No training	15.5	22.4	81

Note: Percentages for Scotland based on 361 respondents

	UK	Scotland	
	Percentage	Percentage	Frequency
First or second degree	60.8	56.2	203
Other qualifications	23.7	21.3	77
None	15.5	22.4	81
Total	100.0	100.0	361

MQ37. What year did you graduate from your most recent degree programme?

	UK	Scotland	
	Percentage	Percentage	Frequency
1950's	1.1	0.0	
1960's	5.2	4.5	9
1970's	13.9	15.4	31
1980's	15.4	14.4	29
1990's	23.5	20.9	42
2000's	36.4	38.3	77
2010's	4.5	6.5	13
Total	100.0	100.0	201
Not applicable			158
Total Obs			203
Non-response rate (%)			1.0

Note: Applicable to those makers who hold a first or second degree

	UK	Scotland
Average years	18.2	17.5
Median	15.0	13.0

MQ38. Who supplies the general business skills (such as bookkeeping, website design and marketing) to run your business?

Do not read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
You	88.9	88.1	318
Your partner/family member	13.8	14.4	52
Friends	2.8	3.6	13
Business partner	1.8	2.2	8
Employee	2.2	1.7	6
Outsourced to professionals	20.2	15.0	54
Other	1.0	0.8	3

Note: Percentages for Scotland based on 361 respondents

MQ39. Have you had any training in general business skills since you started your business?

Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	42.7	46.5	168
Yes - formal training	*26.7*	*29.1*	*105*
Yes - informal training	*20.8*	*21.1*	*76*
No	57.3	53.5	193
Total	100.0	100.0	361

MQ40. Are there specific business skills you want to develop?

	UK	Scotland	
	Percentage	Percentage	Frequency
Marketing (inc. web design)	24.7	24.1	87
IT skills	5.9	2.8	10
General business skills	6.2	5.8	21
Craft technology skills	1.1	1.4	5
Bookkeeping/accounting	5.6	8.9	32
Other	3.7	4.2	15
None	52.8	52.9	191
Total	100.0	100.0	361

MQ41. How do you think your business might change in the next three years?

Read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Use new craft-making technologies	36.7	32.7	118
Use new or different materials	49.1	42.7	154
Develop new or different types of product	63.4	59.6	215
More collaborative or partnership working	39.7	39.1	141
Find new markets	58.5	51.2	185
Work more with other sectors as a consultant or practitioner	28.1	23.3	84
Stop craft-making	5.6	5.8	21
Don't expect any change	8.1	10.8	39
Other	13.2	14.4	52

MQ42. If craft is your main career, was it also your first career? Mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	50.1	51.0	184
No	49.9	49.0	177
Total	100.0	100.0	361

Q45. Gender

	UK	Scotland	
	Percentage	Percentage	Frequency
Male	31.4	31.6	114
Female	68.6	68.4	247
Total	100.0	100.0	361

Q46. Which age group do you fall into?

	UK	Scotland	
	Percentage	Percentage	Frequency
16-24	1.5	2.5	9
25-34	12.7	19.4	70
35-44	20.8	21.1	76
45-54	25.1	22.2	80
55-64	25.5	21.6	78
65 and over	13.2	10.2	37
Declined to answer	1.3	3.0	11
Total	100.0	100.0	361

Q47. Do you consider yourself dyslexic and/or disabled?

Do not read out - Mark all that apply

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes- dyslexic	11.5	10.0	36
Yes – disabled (excluding dyslexia)	4.1	4.4	16
No	83.4	83.7	302
Declined to answer	1.5	2.8	10

Q50. Do you speak Gaelic?

	Scotland	
	Percentage	Frequency
Yes, fluently	0.3	1
Yes, but not fluently	4.2	15
No	95.6	345
Total	100.0	361

Q51. Were you born in the UK?

	UK	Scotland	
	Percentage	Percentage	Frequency
Yes	86.3	87.0	314
Declined to answer	1.5	2.8	10
Other country	12.2	10.2	37
Total	100.0	100.0	361

Q52. How would you describe your national identity?

	UK	Scotland	
	Percentage	Percentage	
English	18.8	3.6	13
Welsh	3.3	0.3	1
Scottish	8.5	48.8	176
Northern Irish	1.6	0.0	0
British	62.5	42.4	153
Irish	1.4	0.0	0
Other	2.3	0.8	3
Declined to answer	1.7	4.2	15
Total	100.0	100.0	361

Q53. What is your ethnic group?

Read out – mark one box only

	UK	Scotland	
	Percentage	Percentage	Frequency
White British	81.0	79.2	286
White Irish	2.4	1.7	6
White Other	10.0	13.3	48
Black/black British	0.5	0.0	0
Asian/Asian British	0.7	0.0	0
Mixed	0.8	0.8	3
Declined to answer	3.2	5.0	18
Other	1.5	0.0	0
Total	100.0	100.0	361

10. Appendix 3: Makers from Wales

The phone survey methodology was expressly designed to give large enough samples of makers at the 'nation' level to be able to analyse their results separately. (The number of retailers, educators, writers and academics surveyed meant that only a UK-wide analysis was possible for them.)

There are few statistically significant differences between the four nations of the UK. There are, however, some minor variations. This appendix includes tables comparing the responses from the 325 makers in Wales with the UK weighted average for each question. Before that we look at some of the more interesting findings in Wales.

10.1 Demographic profile

This first section looks at some of the key demographic indicators for makers:

Gender: In Wales 61.5% of makers were female (UK 68.6%)

Age: The average age of makers is 51.0 years

Ethnicity: Makers from Wales described their ethnicity as follows:

- 86.2% White British (compared with 81.0% in UK)
- 8.0% Other White

National identity: 52.3% of makers described their national identity as British, 28.9% said Welsh, and 8.0% English

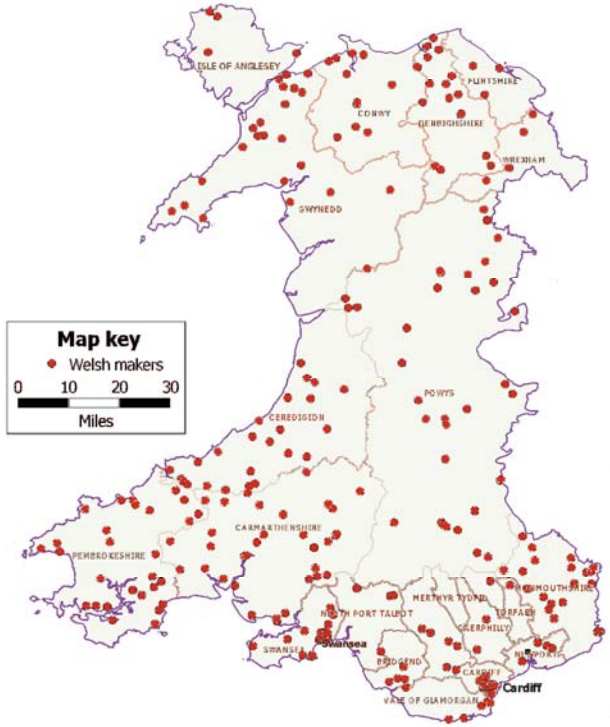
Disability: In Wales, 14.2% of makers said they were dyslexic (11.5% UK), while 3.1% said they were disabled, excluding dyslexia (4.1% UK).

Language: 10.2% of respondents said they spoke Welsh fluently, with a further 22.2% saying they spoke some Welsh. Among these two groups, 50.5% spoke Welsh in the workplace.

10.2 Survey respondents

The respondents to the phone survey came from across Wales, including Anglesey. There were larger clusters of respondents in Cardiff and in South-West Wales.

Figure 54 Location of phone survey respondents from Wales



Source: BOP Consulting (2011)

10.3 Makers' profiles

In Wales, the proportion of 'career changers' – people who have moved into craft-making from other careers but who do not have a degree in art, craft or design – is higher than the UK as a whole. Indeed, Wales is the only country in which it represents the largest of the four groups.

Figure 55 Proportion in each profile group

Contemporary craft-making as a first career	Craft qualifications: First or second degree	Craft qualifications: Other or no qualification
Yes	'Craft careerists' (33.2%)	'Artisans' (10.2%)
No	'Returners' (21.2%)	'Career changers' (35.4%)

Source: BOP Consulting (2011)

10.4 Makers' businesses

The top five materials used by respondents in Wales (multiple responses were allowed) were:

Figure 56 Five most commonly used materials

Materials used	Wales %	UK %
Ceramics	31.4%	25.7% (rank 1st)
Textiles (exc. weaving)	18.2%	22.9% (2nd)
Jewellery	17.2%	20.0% (3rd)
Wood (exc. furniture)	12.0%	10.7% (5th)
Glass	10.5%	10.3% (6th)

Source: BOP Consulting (2011)

Education level: 54.5% of makers in Wales have a relevant degree (UK 60.8%) while 20.6% have no craft qualifications (UK 15.5%)

Hours worked: Makers in Wales spent an average of 40.5 hrs a week on their craft-related activities, of which 27.9 hrs were spent designing and making craft objects (UK average: 38.9 hrs in total, with 26.7 hrs spent designing and making).

Workplace: 67.7% of makers in Wales work from home (UK 65.9%)

Business status: 78.8% of makers in Wales are sole traders (UK 87.7%)

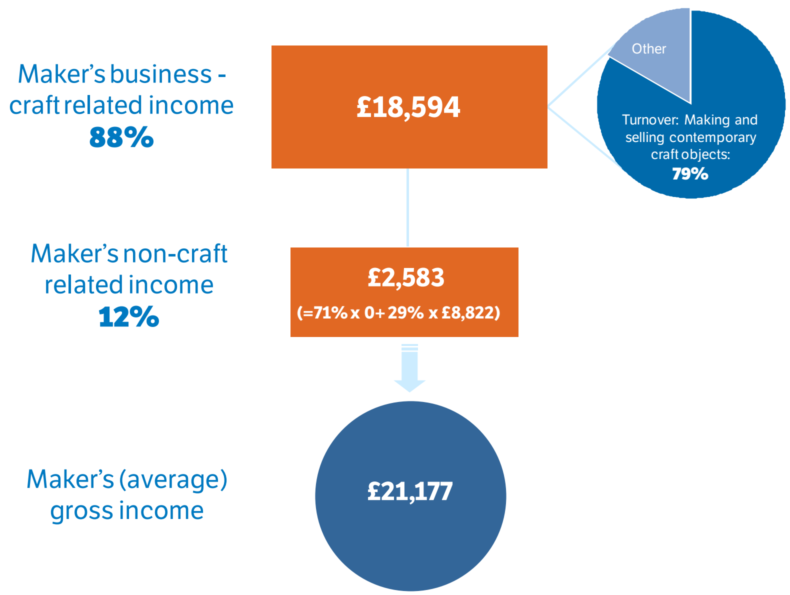
Makers in Wales are a little less likely to sell through online channels.

Makers in Wales were also more likely to have come into craft as a second career (57% vs UK average of 50%).

The average gross income of Wales makers was £21,177. Of this, £18,594 was derived from craft-related income. In turn, 79% of this came from sales of contemporary craft objects.

Makers received another £2,583 on average from non-craft related income such as part-time work or pensions.

Figure 57 Wales: Makers' average gross income, 2010



Source: BOP Consulting (2011)

The average estimated net profit for a maker in Wales was calculated to be £6,194 (UK: £6,231). For full-timers in Wales the average was £7,633, for part-timers it was £3,967.

10.5 Wider issues in the craft sector

Other aspects of craft-making researched included:

Use of digital technology in practice and/or production: In Wales, 57.2% did so (UK 56.5%), most frequently for designing products.

Have you changed your practice in response to environmental concerns? 34.8% of makers in Wales had done so (UK 31.4%). The most common change was to source more environmentally sustainable or sensitive materials.

Do you export your products? 27.7% of makers in Wales had exported work in 2010 (UK 28.4%)

Use of public bodies: 20.6% of makers in Wales had used the services of the Arts Council of Wales in 2010, while 8.9% had used the Crafts Council's services.

Prospects for business: In all, 48.6% of makers expected their contemporary craft sales to grow either considerably or slightly over the next three years (52.1% in UK).

MQ1-4 were 'filter' questions designed to establish that the respondent is a maker, is working in contemporary craft and is currently active. They were phrased to ensure that makers who might not readily identify themselves as having craft businesses were included.

MQ5. What type of business do you have?

Read out - Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Sole trader	87.7	78.8	256
Partnership	5.8	13.8	45
Limited liability partnership	1.8	1.2	4
Private company limited by shares	2.9	2.2	7
Private company limited by guarantee	0.1	0.6	2
Co-operative	0.4	0.9	3
Other	1.3	2.5	8
Total	100.0	100.0	325

MQ6. Do you employ other people?

Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	16.4	27.1	19
No	83.6	72.9	51
Total	100.0	100.0	70
Note: Based on 70 respondents that are not sole traders			

MQ7. How many full-time equivalent people work for your business, excluding yourself?

	UK	Wales	
	Percentage	Percentage	Frequency
0	96.1	94.5	294
1 - 2	2.0	2.6	8
3 - 5	1.2	2.3	7
5 - 8	0.5	0.6	2
>9	0.2	0.0	0
Total	100.0	100.0	311
Total Obs			325
Non-response rate (%)			4.3

MQ8. What was your total craft-related turnover before tax in 2010?

	UK	Wales
Average	£19,827	£18,594
Median	£10,750	£10,000

Note: This question refers to income from all craft related activities, hence it has been treated as 'craft- relate d income' in the document.

	UK	Wales	
Craft-related income (bands)	**Percentage**	**Percentage**	**Frequency**
Up to £10,000	37.1	64.8	206
£10,001-£20,000	43.2	17.0	54
£20,001-£30,000	6.8	4.7	15
£30,001-£50,000	5.3	8.2	26
£50,001-£100,000	5.0	3.1	10
More than £100,000	2.6	2.2	7
		100.0	318
Total Obs			325
Non-response rate (%)			2.2

MQ9. Did you have any non craft-related income in 2010?

Mark one box only

	UK	Wales	
	Percentage	**Percentage**	**Frequency**
Yes	43.8	42.8	139
Did not provide information on non craft-related income	*19.8*	*19.1*	*62*
Provided information on non craft-related income	*24.0*	*23.7*	*77*
No	56.3	57.2	186
Total	100.0	100.0	325

MQ10. How much was this in 2010?

Overall sample	UK	Wales
Average	£3,658	£2,583

Among makers who answered 'yes' to the prior question	UK	Wales
Average	£12,284	£8,822
Median	£8,000	£7,500

MQ11. What are your sources of non-craft income?
Read out - Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Teaching or lecturing at an FE/HE institution (but not in art/craft/design)	8.7	5.8	8
Teaching in a school (but not in art/craft/design)	4.2	0.7	1
Retirement income (e.g. pensions)	21.6	31.7	44
Support from partner or family	1.6	4.3	6
Other private income	14.4	10.1	14
Other full-time job	12.3	12.9	18
Other part-time job	44.3	41.0	57

Note: Only applicable for makers who answered 'yes' to question MQ9

MQ11 Other jobs (category)

	UK	Wales	
	Percentage	Percentage	Frequency
Other full-time job			
Design	16.3	16.7	3
Hospitality	6.7	0.0	
Jewellery	1.4	0.0	
Museums, libraries and archives	0.4	5.6	1
Retail	2.3	5.6	1
Teaching	9.5	0.0	
Other	56.5	72.2	13
Refused	7.0	0.0	
Total	100.0	100.0	18
Other part-time job			
Design	7.3	3.5	2
Hospitality	9.1	7.0	4
Jewellery	0.8	0.0	
Museums, libraries and archives	2.4	3.5	2
Retail	8.8	3.5	2
Teaching	15.1	5.3	3
Other	53.6	71.9	41
Refused	3.0	5.3	3
Total	100.0	100.0	57

MQ12a. What type of craft related activities do you undertake?
Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Making and selling contemporary craft objects	95.8	96.0	312
Making and selling heritage craft objects	3.6	6.5	21
Teaching or lecturing in art/craft/design at an FE/HE institution	12.3	12.3	40
Teaching art/craft/design in a school	7.2	7.4	24
Teaching craft to less formal groups e.g. evening classes, workshops	26.1	27.4	89
Writing professionally about craft	4.5	4.0	13
Being a craft-maker in residence	1.8	4.0	13
Work for other business or sectors using craft skills and knowledge	3.8	4.9	16
Owning, running or working in a commercial gallery or craft shop	3.8	9.8	32
Working in a public museum or gallery (including in the museum shop)	1.8	3.1	10
Running or organising craft events such as exhibitions or fairs	4.7	8.6	28
Curating exhibitions	2.8	3.7	12
Other craft-related activity	5.7	6.2	20

Note: Percentages for Wales based on 325 respondents

MQ12b. What percentage of your craft-related turnover in 2010 came from each of these strands?

	UK	Wales
	Average (%)	Average (%)
Making and selling contemporary craft objects	77.8	78.4
Making and selling heritage craft objects	1.2	2.3
Teaching or lecturing in art/craft/design at an FE/HE institution	4.2	3.2
Teaching art/craft/design in a school	2.5	1.1
Teaching craft to less formal groups e.g. evening classes, workshops	8.2	7.0
Writing professionally about craft	0.3	1.0
Being a craft-maker in residence	0.3	1.1
Work for other business or sectors using craft skills and knowledge	1.2	0.6
Owning, running or working in a commercial gallery or craft shop	1.1	2.4
Working in a public museum or gallery (including in the museum shop)	0.3	0.1
Running or organising craft events such as exhibitions or fairs	0.4	0.8
Curating exhibitions	0.1	0.0
Other craft-related activity	2.3	2.0
Total	100.0	100.0

MQ13. What percentage of your turnover from selling contemporary craft objects in 2010 came from work exported outside the UK?

	UK	Wales	
	Percentage	Percentage	Frequency
0	71.6	72.3	227
>0-25	21.7	22.6	71
>25-50	3.9	1.9	6
>50-75	1.5	1.0	3
>75-100	1.3	2.2	7
Total	100.0	100.0	314
Total Obs			325
Non-response rate (%)			3.4

MQ14. What was your approximate net profit (before tax) for your craft-related work in 2010?

	UK	Wales	
Average	£6,231	£6,194	
Median	£1,000	£1,000	
	Percentage	**Percentage**	**Frequency**
Negative or no profit	13.0	9.5	30
£1-£2,500	46.3	18.0	57
£2,501-£5,000	10.9	44.0	139
£5,001-£10,000	12.1	12.3	39
£10,001-£20,000	8.9	7.6	24
More than £20,000	8.7	8.5	27
Total	100.0	100.0	316
Total Obs			325
Non-response rate (%)			2.8

MQ15. Which fields do you work in?

	UK	Wales	
	Percentage	Percentage	Frequency
Jewellery	20.0	17.2	56
Silver	7.1	5.2	17
Other metal (excluding jewellery and silver)	12.1	9.8	32
Ceramics	25.7	31.4	102
Textiles (including knitting and embroidery, but excluding weaving)	22.9	18.2	59
Weaving	1.9	1.8	6
Leather	2.0	1.8	6
Wood (excluding furniture)	10.7	12.0	39
Furniture	5.9	4.9	16
Stone	2.7	4.3	14
Glass	10.3	10.5	34
Graphic craft (including calligraphy, sign writing, and bookbinding)	2.5	2.8	9
Paper (excluding graphic craft)	4.0	2.5	8
Toys and automata	0.5	1.2	4
Synthetic materials (including plastics)	2.2	1.5	5
Digital	1.2	1.5	5
Mixed media	3.7	8.9	29
Prints and printmaking	0.8	0.0	
Photography	0.5	0.6	2
Millinery	0.4	0.0	
Sculpture	1.0	0.0	
Painting	1.9	3.7	12
Mosaic	0.9	0.3	1
Fine Art	0.2	1.2	4
Other	10.1	10.2	33

Note: Percentages for Wales based on 325 respondents

	UK	
Number of different materials (average)	1.5	1.5

MQ16. In which year did you start working professionally as a craft-maker?

	UK	Wales	
	Percentage	Percentage	Frequency
1940's	0.2	0.0	
1950's	1.0	0.0	
1960's	3.0	1.9	6
1970's	10.6	11.6	37
1980's	15.0	17.9	57
1990's	21.3	19.5	62
2000's	43.4	44.0	140
2010's	5.6	5.0	16
Total	100.0	100.0	318
Total Obs			325
Non-response rate (%)			2.2

	UK	Wales
Average years	16.0	15.7
Median	12.0	12.0

MQ17. How many hours a week, on average, in 2010 did you spend...?

	UK	Wales
	Average	Average
Designing and making your own craft objects	26.7	27.9
Selling of your craft objects	6.6	7.6
Using your craft skills and knowledge working in other sectors	5.6	5.1
Total average hours	38.9	40.5

MQ18. Where do you primarily carry out your craft practice?

	UK	Wales	
	Percentage	Percentage	Frequency
Space in room(s) in own home	21.3	20.0	65
Formal workshop on home premises	44.6	47.7	155
Individual workspace (away from home): rented	17.3	15.4	50
Individual workspace (away from home): owned	3.5	4.0	13
Shared workspace: rented	7.7	4.6	15
Shared workspace: owned	0.7	0.3	1
Client's site (inc. manufacturer's premises)	0.9	1.5	5
School or FE institution	1.1	1.2	4
HE institution or fabrication lab	0.5	0.6	2
Other	2.5	4.6	15
Total	100.0	100.0	325

MQ19. Do you rent space within dedicated artists' studios?
Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	56.4	46.2	30
No	43.6	53.8	35
Total	100.0	100.0	65

Note: Applicable to those makers who rent an individual or shared workspace, according to the prior question

MQ20. How much did you spend approximately in 2010 on buying materials, goods and supplies from other companies, including business services such as design and marketing?

	UK	Wales
Average	£5,287	£4,974
Median	£2,500	£2,000

MQ21. How important is tourism to your business?[47]

Read out - Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Very important	17.8	30.5	99
Fairly important	25.4	31.1	101
Not very important	29.1	20.0	65
Unimportant	27.6	18.5	60
Total	100.0	100.0	325

MQ22a. Which ways do you sell your work?

Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Commissions from general public	42.5	45.8	149
Commissions from businesses (e.g. architects, designers)	17.8	17.8	58
Commissions from institutions (e.g. museums)	12.7	19.7	64
Direct to public from studio/workshop/home	35.9	33.2	108
Through a commercial gallery or exhibition	54.8	56.3	183
Through a publicly funded gallery or exhibition	22.8	30.5	99
Through a craft shop	12.2	20.3	66
Through craft fairs	40.6	31.7	103
Through street markets	4.4	4.0	13
Direct to retailers (other than galleries)	17.6	13.2	43
Through your business website	29.8	26.8	87
Through a third-party website	12.7	8.0	26
Through social media (e.g. Facebook and Twitter)	3.0	2.8	9
Word of mouth	2.3	0.6	2
Other	5.6	8.0	26
Don't sell at the moment	0.6	0.9	3
Did not choose any selling channel	0.3	0.3	1

Note: Percentages for Wales based on 325 respondents

[47] Owing to an editing error in the questionnaire, respondents were not given the option 'neither important nor unimportant' for this question

MQ22b. Which is the single most important in terms of the value of sales?

	UK	Wales	
	Percentage	Percentage	Frequency
Commissions from general public	12.7	13.1	42
Commissions from businesses (e.g. architects, designers)	3.6	2.2	7
Commissions from institutions (e.g. museums)	2.6	5.3	17
Direct to public from studio/workshop/home	11.0	7.2	23
Through a commercial gallery or exhibition	18.5	19.9	64
Through a publicly funded gallery or exhibition	3.0	6.5	21
Through a craft shop	2.7	3.7	12
Through craft fairs	14.4	12.8	41
Through street markets	0.6	0.9	3
Direct to retailers (other than galleries)	4.5	2.8	9
Through your business website	4.7	3.1	10
Through a third-party website	1.1	1.6	5
Through social media (e.g. Facebook and Twitter)	0.1	0.3	1
Word of mouth	1.1	0.3	1
Other	3.7	4.4	14
Did not answer	15.6	15.9	51
Total	100.0	100.0	321

MQ23. What percentage of all your craft-related sales does MQ22b account for?

	UK	Wales
	Average %	Average %
Commissions from general public	65.1	66.6
Commissions from businesses (e.g. architects, designers)	65.7	70.0
Commissions from institutions (e.g. museums)	61.9	65.3
Direct to public from studio/workshop/home	67.8	64.2
Through a commercial gallery or exhibition	63.0	66.1
Through a publicly funded gallery or exhibition	65.4	65.8
Through a craft shop	67.1	63.3
Through craft fairs	64.5	62.6
Through street markets	61.9	35.0
Direct to retailers (other than galleries)	69.1	58.0
Through your business website	63.2	61.1
Through a third-party website	63.2	68.8
Through social media (e.g. Facebook and Twitter)	26.4	50.0
Word of mouth	70.1	100.0
Other	67.5	63.3

MQ24. How has the share changed over the last three years (Or since you've been trading) for each of your sales routes?
Read out - Mark one box per row

UK	Percentage: Grown considerably	Grown slightly	Stayed steady	Declined slightly	Declined considerably	Total
Commissions from general public	8.0	22.0	39.5	18.3	12.1	100.0
Commissions from businesses (e.g. architects, designers)	7.1	25.6	39.0	12.3	16.0	100.0
Commissions from institutions (e.g. museums)	8.8	17.3	46.6	15.4	11.8	100.0
Direct to public from studio/workshop/home	9.9	21.7	40.4	16.8	11.3	100.0
Through a commercial gallery or exhibition	6.9	18.3	38.5	20.6	15.8	100.0
Through a publicly funded gallery or exhibition	3.3	16.6	45.4	20.6	14.0	100.0
Through a craft shop	2.0	19.3	45.4	21.6	11.8	100.0
Through craft fairs	8.0	18.4	33.8	21.8	18.2	100.0
Through street markets	5.4	10.7	49.1	16.0	18.8	100.0
Direct to retailers (other than galleries)	12.4	21.9	33.0	19.9	12.9	100.0
Through your business website	11.8	28.7	44.6	10.0	4.8	100.0
Through a third-party website	7.6	26.9	45.1	14.9	5.5	100.0
Through social media (e.g. Facebook and Twitter)	21.1	44.6	25.6	5.0	3.8	100.0
Word of mouth	22.6	20.0	33.7	6.7	17.0	100.0
Other	13.5	19.5	44.3	13.3	9.4	100.0
Wales						
Commissions from general public	6.7	26.2	36.9	20.1	10.1	100.0
Commissions from businesses (e.g. architects, designers)	6.9	24.1	43.1	13.8	12.1	100.0
Commissions from institutions (e.g. museums)	10.9	17.2	39.1	18.8	14.1	100.0
Direct to public from studio/workshop/home	11.5	20.2	40.4	13.5	14.4	100.0
Through a commercial gallery or exhibition	3.8	15.9	39.9	21.9	18.6	100.0
Through a publicly funded gallery or exhibition	3.0	17.2	45.5	22.2	12.1	100.0
Through a craft shop	4.6	12.1	42.4	34.9	6.1	100.0
Through craft fairs	7.8	19.4	34.0	17.5	21.4	100.0
Through street markets	7.7	23.1	38.5	15.4	15.4	100.0
Direct to retailers (other than galleries)	11.6	23.3	34.9	20.9	9.3	100.0
Through your business website	14.9	31.0	33.3	14.9	5.8	100.0
Through a third-party website	11.5	34.6	50.0	0.0	3.9	100.0
Through social media (e.g. Facebook and Twitter)	22.2	22.2	33.3	0.0	22.2	100.0
Word of mouth	0.0	0.0	100.0	0.0	0.0	100.0
Other	6.3	31.3	34.4	18.8	9.4	100.0

MQ25. What percentage of your turnover in 2010 from contemporary craft sales comes from...?

	UK Average %	Wales Average %
All non-commissioned work for general public sale	49.0	54.0
All commissioned work	51.0	46.0
Total	100.0	100.0
Obs		311
Total Obs		325
Non-response rate (%)		4.3

MQ26. How has the percentage of your contemporary craft turnover from commissioned work changed over the last three years (or since you've been trading) ...?
Read out - Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Increased significantly	9.2	10.7	18
Increased slightly	21.7	20.7	35
Stayed roughly the same	41.5	37.3	63
Decreased slightly	13.2	16.0	27
Decreased significantly	8.6	8.3	14
Don’t know	5.9	7.1	12
Total	100.0	100.0	169

Note: Based on 169 respondents that have had work commissioned

MQ27. Has your work ever been bought by a public collection?
Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	28.7	28.0	91
No	68.3	66.2	215
Don’t know	3.1	5.8	19
Total	100.0	100.0	325

MQ28. And has your work ever been re-sold by its original purchaser?
Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	20.0	21.5	70
No	40.6	36.6	119
Don't know	39.4	41.8	136
Total	100.0	100.0	325

MQ29. How do you expect your contemporary craft sales to change over the next three years?
Read out - Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Grow considerably	17.2	16.3	53
Grow slightly	34.9	32.3	105
Stay steady	21.4	22.2	72
Decline slightly	7.6	7.7	25
Decline considerably	4.6	5.2	17
Don't know	12.8	15.1	49
Not applicable	1.5	1.2	4
Total	100.0	100.0	325

MQ30. Have you changed your practice in the last three years (or since you've been trading) in response to environmental concerns?
Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	31.4	34.8	113
No	68.6	65.2	212
Total	100.0	100.0	325

MQ31. In what areas have you changed your practice in response to environmental concerns?
Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Source more environmentally sensitive or sustainable materials	16.4	15.7	51
Use more environmentally sensitive or sustainable production processes	10.4	10.8	35
Choose local suppliers to reduce transport miles	6.4	6.5	21
Choose suppliers with more environmentally sustainable practices	3.5	4.9	16
Choose distributors/retailers with more environmentally sustainable practices	2.2	3.1	10
Recycling	5.0	6.5	21
Other	4.9	9.2	30

Note: Percentages for Wales based on 325 respondents

MQ32. And have you changed your practice in the last three years in response to other ethical concerns? If so what have you done? (e.g. use fairtrade products)
Specify under 'Other' below

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	14.0	14.2	46
No	86.0	85.8	279
Total	100.0	100.0	325

MQ33. Do you use digital technology in your practice or production?
Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	56.5	57.2	186
Yes – for designing	52.4	55.9	104
Yes – for making	34.4	34.9	65
Yes – other	47.0	47.8	89
Photographing	9.8	10.8	*20*
Marketing	17.2	17.2	*32*
Communications	1.0	0.0	
Other	20.6	19.9	*37*
No	43.6	42.8	139
Total	100.0	100.0	325

MQ34. How much do you use digital technology in your practice or production?
Read out - Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
All the time	28.6	24.2	45
Often	28.9	24.7	46
Sometimes	17.7	21.5	40
Occasionally	24.9	29.6	55
Total	100.0	100.0	186

Note: Applicable to those makers who answered 'yes' in the prior question

MQ35. In 2010, in relation to your craft practice, did you make use of the services provided by any of the following public bodies?
Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Crafts Council	13.9	8.9	29
Arts Council England	5.7	0.0	
Arts Council of Wales	1.5	20.6	67
Craft Scotland	5.1	0.0	
Creative Scotland	2.2	0.0	
Craft Northern Ireland	1.3	0.0	
Arts Council of Northern Ireland	1.3	0.0	
Crafts Council of Ireland	0.6	0.0	
None of these	75.9	74.5	242

Note: Percentages for Wales based on 325 respondents

MQ36. What qualifications and training, including equivalent non-UK qualifications, have you completed that are particularly relevant to craft work?
Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Art/design/craft degree at college or university (BA, BSc)	56.0	51.1	166
Art/design/craft postgraduate degree at college or university (MA/MSc/PhD)	20.2	20.0	65
Foundation course in art/design/craft	16.2	13.5	44
A level and/or O level/GCSE in art/design/craft	16.9	16.9	55
Formal apprenticeship	5.5	4.0	13
Working with experienced makers (not as formal apprenticeship)	6.1	14.2	46
Part-time and short courses	8.9	10.2	33
Adult education classes	5.9	6.5	21
Other craft training	13.8	11.4	37
N/A - No training	15.5	20.6	67

Note: Percentages for Wales based on 325 respondents

	UK	Wales	
	Percentage	Percentage	Frequency
First or second degree	60.8	54.5	177
Other qualifications	23.7	24.9	81
None	15.5	20.6	67
Total	100.0	100.0	325

MQ37. What year did you graduate from your most recent degree programme?

	UK	Wales	
	Percentage	Percentage	Frequency
1950's	1.1	1.7	3
1960's	5.2	4.6	8
1970's	13.9	14.9	26
1980's	15.4	16.6	29
1990's	23.5	16.6	29
2000's	36.4	38.3	67
2010's	4.5	7.4	13
Total	100.0	100.0	175
Not applicable			148
Total Obs			177
Non-response rate (%)			1.1
Note: Applicable to those makers who hold a first or second degree			

Average years	18.2	18.0
Median	15.0	14.0

MQ38. Who supplies the general business skills (such as bookkeeping, website design and marketing) to run your business?
Do not read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
You	88.9	86.8	282
Your partner/family member	13.8	16.9	55
Friends	2.8	3.1	10
Business partner	1.8	3.7	12
Employee	2.2	2.8	9
Outsourced to professionals	20.2	19.7	64
Other	1.0	0.9	3

Note: Percentages for Wales based on 325 respondents

MQ39. Have you had any training in general business skills since you started your business?
Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	42.7	42.8	139
Yes - formal training	*26.7*	*28.6*	*93*
Yes - informal training	*20.8*	*18.5*	*60*
No	57.3	57.2	186
Total	100.0	100.0	325

MQ40. Are there specific business skills you want to develop?

	UK	Wales	
	Percentage	Percentage	Frequency
Marketing (inc. web design)	24.7	24.0	78
IT skills	5.9	6.2	20
General business skills	6.2	3.7	12
Craft technology skills	1.1	0.9	3
Bookkeeping/accounting	5.6	4.6	15
Other	3.7	2.5	8
None	52.8	58.2	189
Total	100.0	100.0	325

MQ41. How do you think your business might change in the next three years?
Read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Use new craft-making technologies	36.7	28.9	94
Use new or different materials	49.1	36.0	117
Develop new or different types of product	63.4	55.4	180
More collaborative or partnership working	39.7	25.8	84
Find new markets	58.5	48.6	158
Work more with other sectors as a consultant or practitioner	28.1	20.0	65
Stop craft-making	5.6	3.7	12
Don't expect any change	8.1	9.2	30
Other	13.2	24.0	78

MQ42. If craft is your main career, was it also your first career?
Mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
Yes	50.1	43.4	141
No	49.9	56.6	184
Total	100.0	100.0	325

Q45. Gender

	UK	Wales	
	Percentage	Percentage	Frequency
Male	31.4	38.5	125
Female	68.6	61.5	200
Total	100.0	100.0	325

Q46. Which age group do you fall into?

	UK	Wales	
	Percentage	Percentage	Frequency
16-24	1.5	1.5	5
25-34	12.7	9.2	30
35-44	20.8	13.8	45
45-54	25.1	26.8	87
55-64	25.5	32.6	106
65 and over	13.2	14.8	48
Declined to answer	1.3	1.2	4
Total	100.0	100.0	325

Q47. Do you consider yourself dyslexic and/or disabled?
Do not read out - Mark all that apply

	UK	Wales	
	Percentage	Percentage	Frequency
Yes- dyslexic	11.5	14.2	46
Yes – disabled (excluding dyslexia)	4.1	3.1	10
No	83.4	82.5	268
Declined to answer	1.5	0.6	2

Q48. Do you speak Welsh?

Read out – mark one box only

	Wales Percentage	Wales Frequency
Yes, fluently	10.2	33
Yes, but not fluently	22.2	72
No	67.7	220
Total	100.0	325

Q49. Do you speak Welsh in the workplace?

Mark one box only

	Wales Percentage	Wales Frequency
Yes	50.5	53
No	49.5	52
Total	100.0	105

Note: Based on 105 respondents that answered 'yes' to the prior question

Q51. Were you born in the UK?

	UK Percentage	Wales Percentage	Wales Frequency
Yes	86.3	93.8	305
Declined to answer	1.5	0.6	2
Other country	12.2	5.5	18
Total	100.0	100.0	325

Q52. How would you describe your national identity?

	UK	Wales	
	Percentage	Percentage	Frequency
English	18.8	8.0	26
Welsh	3.3	28.9	94
Scottish	8.5	1.8	6
Northern Irish	1.6	0.0	0
British	62.5	52.3	170
Irish	1.4	0.6	2
Other	2.3	4.0	13
Declined to answer	1.7	4.3	14
Total	100.0	100.0	325

Q53. What is your ethnic group?
Read out - mark one box only

	UK	Wales	
	Percentage	Percentage	Frequency
White British	81.0	86.2	280
White Irish	2.4	1.2	4
White Other	10.0	8.0	26
Black/black British	0.5	0.0	0
Asian/Asian British	0.7	0.6	2
Mixed	0.8	0.0	0
Declined to answer	3.2	2.8	9
Other	1.5	1.2	4
Total	100.0	100.0	325

11. Appendix 4: Makers from Northern Ireland

The phone survey methodology was expressly designed to give large enough samples of makers at the ‘nation’ level to be able to analyse their results separately. (The number of retailers, educators, writers and academics surveyed meant that only a UK-wide analysis was possible for them.)

There are few statistically significant differences between the four nations of the UK. There are, however, some minor variations. This appendix includes tables comparing the responses from the 160 makers in Northern Ireland with the UK weighted average for each question. Before that we look at some of the more interesting findings in Northern Ireland.

11.1 Demographic profile

This section looks at some of the key demographic indicators for makers.

Gender: In Northern Ireland 66.9% of makers were female (UK: 68.6%)

Age: The average age of makers is 45.2 years

Ethnicity: Makers from Northern Ireland described their ethnicity as follows:

- White British 50.0% (compared with 81.0% in UK).
- White Irish 34.4%
- White Other 11.3%.

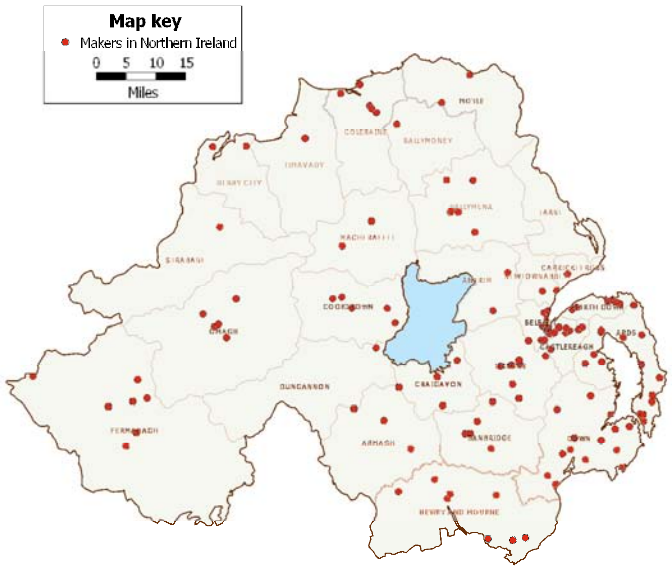
National identity: 35.0% of makers described their national identity as British, 30.0% chose Northern Irish, and 23.1% said Irish.

Disability: In Northern Ireland, 8.1% of makers said they were dyslexic (11.5% UK); while 3.1% described themselves as disabled, excluding dyslexia (4.1% UK).

11.2 Survey respondents

The respondents to the phone survey came from across Northern Ireland, but with greater concentrations around Belfast and in County Down. There were fewer respondents in the west.

Figure 58 Location of phone survey respondents from Northern Ireland



Source: BOP Consulting (2011)

11.3 Makers' profile

In Northern Ireland, the proportion of 'career changers' – people who have moved into craft-making from other careers but who do not have a degree in art, craft or design – is a little higher than the UK as a whole, as is the proportion of 'artisans'.

Figure 59 Proportion in each profile group

Contemporary craft-making as a first career	Craft qualifications: First or second degree	Craft qualifications: Other or no qualification
Yes	'Craft careerists' (38.1%)	'Artisans' (14.4%)
No	'Returners' (18.1%)	'Career changers' (29.4%)

Source: BOP Consulting (2011)

11.4 Makers' businesses

The top five materials used by respondents in Northern Ireland (multiple responses were allowed) were:

Figure 60 Five most commonly used materials

Materials used	N Ireland %	UK %
Ceramics	27.5%	25.7% (rank 1st)
Textiles (exc. weaving)	23.8%	22.9% (2nd)
Jewellery	15.6%	20.0% (3rd)
Other metal (exc. jewellery and silver)	11.9%	12.1% (4th)
Wood (exc. furniture)	11.9%	10.7% (5th)

Source: BOP Consulting (2011)

Education level: 56.3% of makers in N. Ireland have a craft-related degree (UK average 60.8%) while 26.3% have no craft qualifications (UK 15.5%)

Hours worked: Northern Ireland makers spent an average of 39.3 hrs a week working on craft-related activity, of which 26.4 hrs were spent designing and making craft objects (UK averages: 38.9 hrs in total, 26.7 hrs designing and making)

Workplace: 62.5% of makers in Northern Ireland work from home (UK average: 65.9%)

Business status: 88.1% of Northern Ireland makers are sole traders (UK 87.7%)

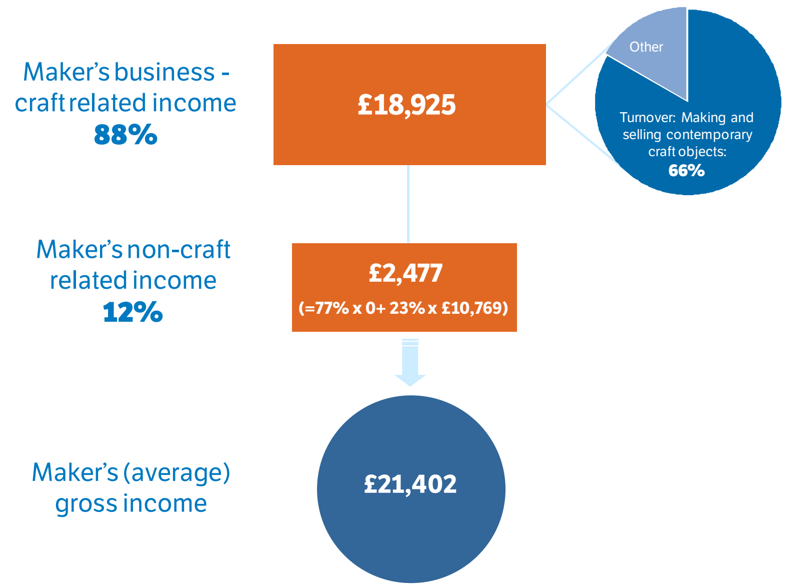
Northern Ireland makers were more likely to sell by commissioning than the UK averages, but less likely to do so through galleries and exhibitions and online routes. Northern Ireland makers who received commissions derived a higher share of their overall turnover from commissioning than UK makers as a whole did (57% vs 51% in the UK).

Makers who rented premises were less likely to be in dedicated artists' studios than in the rest of the UK (39% vs 56%).

The average gross income of Northern Ireland makers was £21,402. Of this, £18,925 was derived from craft-related income. In turn, 66% of this came from sales of contemporary craft objects. Craft-related teaching is relatively more important to Northern Ireland makers than it is to makers in the other three nations of the UK.

Makers received another £2,477 on average from non-craft related income such as part-time work or pensions.

Figure 61 Sources of income for Northern Irish makers



Source: BOP Consulting (2011)

The average estimated net profit for a maker in Northern Ireland was calculated to be £4,976 (UK: £6,231). For full-timers in Northern Ireland the average was £6,039, for part-timers it was £3,572.

11.5 Wider issues in the craft sector

Other aspects of craft-making researched included:

Use of digital technology in practice and/or production: In Northern Ireland, 50.0% did so (UK 56.5%), most frequently for designing products.

Have you changed your practice in response to environmental concerns? 30.0% of makers in Northern Ireland had done so (UK 31.4%). The most common change was to source more environmentally sustainable or sensitive materials.

Do you export your products? 37.7% of makers in Northern Ireland had exported work in 2010 (UK 28.4%)

Use of public bodies: 28.1% of respondents had used the services of Craft Northern Ireland in 2010, while 27.5% had used the Arts Council of Northern Ireland's services and 13.8% had used the Crafts Council of Ireland's.

Prospects for business: In all, 54.4% of Northern Ireland makers expected their contemporary craft sales to grow either considerably or slightly over the next three years (52.1% in UK).

MQ1-4 were 'filter' questions designed to establish that the respondent is a maker, is working in contemporary craft, and is currently active. They were phrased to ensure that makers who might not readily identify themselves as having craft businesses were included.

MQ5. What type of business do you have?

Read out - Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Sole trader	87.7	88.1	141
Partnership	5.8	4.4	7
Limited liability partnership	1.8	1.3	2
Private company limited by shares	2.9	1.3	2
Private company limited by guarantee	0.1	0.0	
Co-operative	0.4	0.0	
Other	1.3	5.0	8
Total	100.0	100.0	160

MQ6. Do you employ other people?

Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	16.4	18.2	4
No	83.6	81.8	18
Total	100.0	100.0	22
Note: Based on 22 respondents that are not sole traders			

MQ7. How many full-time equivalent people work for your business, excluding yourself?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
0	96.1	98.1	152
1 - 2	2.0	0.0	0
3 - 5	1.2	0.0	0
5 - 8	0.5	1.3	2
>9	0.2	0.6	1
Total	100.0	100.0	155
Total Obs			160
Non-response rate (%)			3.1

MQ8. What was your total craft-related turnover before tax in 2010?

	UK	Northern Ireland
Average	£19,827	£18,925
Median	£10,750	£14,000

Note: This question refers to income from all craft related activities, hence it has been treated as 'craft- related income' in the document.

	UK	Northern Ireland	
Craft-related income (bands)	**Percentage**	**Percentage**	**Frequency**
Up to £10,000	37.1	22.8	36
£10,001-£20,000	43.2	57.0	90
£20,001-£30,000	6.8	7.0	11
£30,001-£50,000	5.3	7.6	12
£50,001-£100,000	5.0	4.4	7
More than £100,000	2.6	1.3	2
Total	100.0	100.0	158
Total Obs			160
Non-response rate (%)			1.3

MQ9. Did you have any non craft-related income in 2010?

Mark one box only

	UK	Northern Ireland	
	Percentage	**Percentage**	**Frequency**
Yes	43.8	35.6	57
Did not provide information on non craft-related income	*19.8*	*16.3*	*26*
Provided information on non craft-related income	*24.0*	*19.4*	*31*
No	56.3	64.4	103
Total	100.0	100.0	160

MQ10. How much was this in 2010?

Overall sample	UK	Northern Ireland
Average	£3,658	£2,477
Among makers who answered 'yes' to the prior question		
Average	£12,284	£10,706
Median	£8,000	£10,500

MQ11. What are your sources of non-craft income?
Read out - Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Teaching or lecturing at an FE/HE institution (but not in art/craft/design)	8.7	3.5	2
Teaching in a school (but not in art/craft/design)	4.2	10.5	6
Retirement income (e.g. pensions)	21.6	10.5	6
Support from partner or family	1.6	0.0	
Other private income	14.4	7.0	4
Other full-time job	12.3	19.3	11
Other part-time job	44.3	50.9	29

Note: Only applicable for makers who answered 'yes' to question MQ9

MQ11 Other job (category)

	UK	Northern Ireland	
Other full-time job	Percentage	Percentage	Frequency
Design	16.3	9.1	1
Hospitality	6.7	18.2	2
Jewellery	1.4	0.0	
Museums, libraries and archives	0.4	0.0	
Retail	2.3	9.1	1
Teaching	9.5	18.2	2
Other	56.5	45.5	5
Refused	7.0	0.0	
Total	100.0	100.0	11
Other part-time job			
Design	7.3	3.4	1
Hospitality	9.1	10.3	3
Jewellery	0.8	0.0	
Museums, libraries and archives	2.4	0.0	
Retail	8.8	3.4	1
Teaching	15.1	20.7	6
Other	53.6	55.2	16
Refused	3.0	6.9	2
Total	100.0	100.0	29

MQ12a. What type of craft related activities do you undertake?
Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Making and selling contemporary craft objects	95.8	89.4	143
Making and selling heritage craft objects	3.6	5.6	9
Teaching or lecturing in art/craft/design at an FE/HE institution	12.3	13.8	22
Teaching art/craft/design in a school	7.2	7.5	12
Teaching craft to less formal groups e.g. evening classes, workshops	26.1	31.3	50
Writing professionally about craft	4.5	2.5	4
Being a craft-maker in residence	1.8	2.5	4
Work for other business or sectors using craft skills and knowledge	3.8	3.1	5
Owning, running or working in a commercial gallery or craft shop	3.8	4.4	7
Working in a public museum or gallery (including in the museum shop)	1.8	1.3	2
Running or organising craft events such as exhibitions or fairs	4.7	6.9	11
Curating exhibitions	2.8	1.9	3
Other craft-related activity	5.7	8.8	14

Note: Percentages for Northern Ireland based on 160 respondents

MQ12b. What percentage of your craft-related turnover in 2010 came from each of these strands?

	UK	Northern Ireland
	Average (%)	Average (%)
Making and selling contemporary craft objects	77.8	70.1
Making and selling heritage craft objects	1.2	2.0
Teaching or lecturing in art/craft/design at an FE/HE institution	4.2	5.2
Teaching art/craft/design in a school	2.5	5.4
Teaching craft to less formal groups e.g. evening classes, workshops	8.2	8.2
Writing professionally about craft	0.3	0.0
Being a craft-maker in residence	0.3	1.6
Work for other business or sectors using craft skills and knowledge	1.2	0.6
Owning, running or working in a commercial gallery or craft shop	1.1	1.6
Working in a public museum or gallery (including in the museum shop)	0.3	0.0
Running or organising craft events such as exhibitions or fairs	0.4	0.4
Curating exhibitions	0.1	0.2
Other craft-related activity	2.3	4.9
Total	100	100.1

MQ13. What percentage of your turnover from selling contemporary craft objects in 2010 came from work exported outside the UK?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
0	71.6	62.3	94
>0-25	21.7	17.2	26
>25-50	3.9	11.3	17
>50-75	1.5	4.6	7
>75-100	1.3	4.6	7
Total	100.0	100.0	151
Total Obs			160
Non-response rate (%)			5.6

MQ14. What was your approximate net profit (before tax) for your craft-related work in 2010?

	UK	Northern Ireland	
Average	£6,231	£4,976	
Median	£1,000	£1,500	
	Percentage	Percentage	Frequency
Negative or no profit	13.0	8.3	13
£1-£2,500	46.3	53.8	84
£2,501-£5,000	10.9	8.3	13
£5,001-£10,000	12.1	10.9	17
£10,001-£20,000	8.9	14.7	23
More than £20,000	8.7	3.8	6
Total	100.0	100.0	156
Total Obs			160
Non-response rate (%)			2.5

MQ15. Which fields do you work in?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Jewellery	20.0	15.6	25
Silver	7.1	5.6	9
Other metal (excluding jewellery and silver)	12.1	11.9	19
Ceramics	25.7	27.5	44
Textiles (including knitting and embroidery, but excluding weaving)	22.9	23.8	38
Weaving	1.9	3.1	5
Leather	2.0	0.0	
Wood (excluding furniture)	10.7	11.9	19
Furniture	5.9	4.4	7
Stone	2.7	4.4	7
Glass	10.3	9.4	15
Graphic craft (including calligraphy, sign writing, and bookbinding)	2.5	3.8	6
Paper (excluding graphic craft)	4.0	5.6	9
Toys and automata	0.5	0.6	1
Synthetic materials (including plastics)	2.2	1.3	2
Digital	1.2	1.3	2
Mixed media	3.7	5.6	9
Prints and printmaking	0.8	0.6	1
Photography	0.5	0.0	
Millinery	0.4	0.6	1
Sculpture	1.0	1.9	3
Painting	1.9	3.1	5
Mosaic	0.9	1.3	2
Fine Art	0.2	0.0	
Other	10.1	13.8	22

Note: Percentages for Northern Ireland based on 160 respondents

	UK	
Number of different materials used (average)	1.5	1.6

MQ16. In which year did you start working professionally as a craft-maker?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
1940's	0.2	0.0	
1950's	1.0	0.6	1
1960's	3.0	0.6	1
1970's	10.6	8.3	13
1980's	15.0	10.8	17
1990's	21.3	27.4	43
2000's	43.4	48.4	76
2010's	5.6	3.8	6
Total	100.0	100.0	157
Total Obs			160
Non-response rate (%)			1.9
Average years	16.0	14.3	
Median	12.0	11.0	

MQ17. How many hours a week, on average, in 2010 did you spend...?

	UK	Northern Ireland
	Average	Average
Designing and making your own craft objects	26.7	26.4
Selling of your craft objects	6.6	5.4
Using your craft skills and knowledge working in other sectors	5.6	7.5
Total average hours	38.9	39.3

MQ18. Where do you primarily carry out your craft practice?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Space in room(s) in own home	21.3	25.0	40
Formal workshop on home premises	44.6	37.5	60
Individual workspace (away from home): rented	17.3	23.8	38
Individual workspace (away from home): owned	3.5	3.8	6
Shared workspace: rented	7.7	3.8	6
Shared workspace: owned	0.7	0.0	0
Client's site (inc. manufacturer's premises)	0.9	2.5	4
School or FE institution	1.1	1.3	2
HE institution or fabrication lab	0.5	0.0	0
Other	2.5	2.5	4
Total	100.0	100.0	160

MQ19. Do you rent space within dedicated artists' studios?
Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	56.4	38.6	17
No	43.6	61.4	27
Total	100.0	100.0	44

Note: Applicable to those makers who rent an individual or shared workspace, according to the prior question

MQ20. How much did you spend approximately in 2010 on buying materials, goods and supplies from other companies, including business services such as design and marketing?

	UK	Northern Ireland
Average	£5,287	£5,072
Median	£2,500	£4,000

MQ21. How important is tourism to your business?[48]

Read out - Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Very important	17.8	26.9	43
Fairly important	25.4	26.9	43
Not very important	29.1	30.6	49
Unimportant	27.6	15.6	25
Total	100.0	100.0	160

MQ22a. Which ways do you sell your work?

Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Commissions from general public	42.5	42.5	68
Commissions from businesses (e.g. architects, designers)	17.8	23.1	37
Commissions from institutions (e.g. museums)	12.7	15.6	25
Direct to public from studio/workshop/home	35.9	30.6	49
Through a commercial gallery or exhibition	54.8	31.3	50
Through a publicly funded gallery or exhibition	22.8	19.4	31
Through a craft shop	12.2	19.4	31
Through craft fairs	40.6	38.1	61
Through street markets	4.4	3.1	5
Direct to retailers (other than galleries)	17.6	21.9	35
Through your business website	29.8	15.6	25
Through a third-party website	12.7	6.3	10
Through social media (e.g. Facebook and Twitter)	3.0	5.0	8
Word of mouth	2.3	1.9	3
Other	5.6	7.5	12
Don't sell at the moment	0.6	1.9	3
Did not choose any selling channel	0.3	0.6	1

Note: Percentages for Northern Ireland based on 160 respondents

[48] Owing to an editing error in the questionnaire, respondents were not given the option 'neither important nor unimportant' for this question

MQ22b. Which is the single most important in terms of the value of sales?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Commissions from general public	12.7	16.0	25
Commissions from businesses (e.g. architects, designers)	3.6	1.9	3
Commissions from institutions (e.g. museums)	2.6	5.8	9
Direct to public from studio/workshop/home	11.0	11.5	18
Through a commercial gallery or exhibition	18.5	9.0	14
Through a publicly funded gallery or exhibition	3.0	2.6	4
Through a craft shop	2.7	8.3	13
Through craft fairs	14.4	12.2	19
Through street markets	0.6	1.3	2
Direct to retailers (other than galleries)	4.5	8.3	13
Through your business website	4.7	1.9	3
Through a third-party website	1.1	0.0	0
Through social media (e.g. Facebook and Twitter)	0.1	0.0	0
Word of mouth	1.1	1.9	3
Other	3.7	2.6	4
Did not answer	15.6	16.7	26
Total	100.0	100	156

MQ23. What percentage of all your craft-related sales does MQ22b account for?

	UK	Northern Ireland
	Average %	Average %
Commissions from general public	65.1	67.0
Commissions from businesses (e.g. architects, designers)	65.7	65.0
Commissions from institutions (e.g. museums)	61.9	77.2
Direct to public from studio/workshop/home	67.8	66.5
Through a commercial gallery or exhibition	63.0	63.8
Through a publicly funded gallery or exhibition	65.4	58.8
Through a craft shop	67.1	71.2
Through craft fairs	64.5	70.7
Through street markets	61.9	72.5
Direct to retailers (other than galleries)	69.1	69.5
Through your business website	63.2	60.0
Through a third-party website	63.2	–
Through social media (e.g. Facebook and Twitter)	26.4	–
Word of mouth	70.1	61.7
Other	67.5	65.0

MQ24. How has the share changed over the last three years (or since you've been trading) for each of your sales routes?

Read out - Mark one box per row

	Percentage					
UK	**Grown considerably**	**Grown slightly**	**Stayed steady**	**Declined slightly**	**Declined considerably**	**Total**
Commissions from general public	8.0	22.0	39.5	18.3	12.1	100.0
Commissions from businesses (e.g. architects, designers)	7.1	25.6	39.0	12.3	16.0	100.0
Commissions from institutions (e.g. museums)	8.8	17.3	46.6	15.4	11.8	100.0
Direct to public from studio/workshop/home	9.9	21.7	40.4	16.8	11.3	100.0
Through a commercial gallery or exhibition	6.9	18.3	38.5	20.6	15.8	100.0
Through a publicly funded gallery or exhibition	3.3	16.6	45.4	20.6	14.0	100.0
Through a craft shop	2.0	19.3	45.4	21.6	11.8	100.0
Through craft fairs	8.0	18.4	33.8	21.8	18.2	100.0
Through street markets	5.4	10.7	49.1	16.0	18.8	100.0
Direct to retailers (other than galleries)	12.4	21.9	33.0	19.9	12.9	100.0
Through your business website	11.8	28.7	44.6	10.0	4.8	100.0
Through a third-party website	7.6	26.9	45.1	14.9	5.5	100.0
Through social media (e.g. Facebook and Twitter)	21.1	44.6	25.6	5.0	3.8	100.0
Word of mouth	22.6	20.0	33.7	6.7	17.0	100.0
Other	13.5	19.5	44.3	13.3	9.4	100.0
Northern Ireland						
Commissions from general public	7.4	20.6	30.9	17.7	23.5	100.0
Commissions from businesses (e.g. architects, designers)	2.7	10.8	46.0	24.3	16.2	100.0
Commissions from institutions (e.g. museums)	16.0	8.0	44.0	20.0	12.0	100.0
Direct to public from studio/workshop/home	10.4	18.8	22.9	25.0	22.9	100.0
Through a commercial gallery or exhibition	10.0	18.0	26.0	20.0	26.0	100.0
Through a publicly funded gallery or exhibition	3.2	22.6	32.3	22.6	19.4	100.0
Through a craft shop	3.2	9.7	38.7	32.3	16.1	100.0
Through craft fairs	3.3	6.6	31.2	26.2	32.8	100.0
Through street markets	20.0	0.0	20.0	40.0	20.0	100.0
Direct to retailers (other than galleries)	5.7	17.1	28.6	17.1	31.4	100.0
Through your business website	8.0	28.0	52.0	12.0	0.0	100.0
Through a third-party website	0.0	10.0	50.0	30.0	10.0	100.0
Through social media (e.g. Facebook and Twitter)	25.0	37.5	37.5	0.0	0.0	100.0
Word of mouth	33.3	0.0	66.7	0.0	0.0	100.0
Other	5.0	30.0	30.0	15.0	20.0	100.0

MQ25. What percentage of your turnover in 2010 from contemporary craft sales comes from...?

	UK	Northern Ireland
	Average %	Average %
All non-commissioned work for general public sale	49.0	43.0
All commissioned work	51.0	57.0
Total	100.0	100.0
Obs		151
Total Obs		160
Non-response rate (%)		5.6

MQ26. How has the percentage of your contemporary craft turnover from commissioned work changed over the last three years (or since you've been trading) ...?

Read out - Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Increased significantly	9.2	7.1	6
Increased slightly	21.7	21.2	18
Stayed roughly the same	41.5	31.8	27
Decreased slightly	13.2	15.3	13
Decreased significantly	8.6	21.2	18
Don’t know	5.9	3.5	3
Total	100.0	100.0	85

Note: Based on 85 respondents that have commissioned work

MQ27. Has your work ever been bought by a public collection?

Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	28.7	33.8	54
No	68.3	61.9	99
Don’t know	3.1	4.4	7
Total	100.0	100.0	160

MQ28. And has your work ever been re-sold by its original purchaser?
Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	20.0	15.6	25
No	40.6	38.8	62
Don't know	39.4	45.6	73
Total	100.0	100.0	160

MQ29. How do you expect your contemporary craft sales to change over the next three years?
Read out - Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Grow considerably	17.2	15.6	25
Grow slightly	34.9	38.8	62
Stay steady	21.4	16.9	27
Decline slightly	7.6	8.8	14
Decline considerably	4.6	5.6	9
Don't know	12.8	11.9	19
Not applicable	1.5	2.5	4
Total	100.0	100.0	160

MQ30. Have you changed your practice in the last three years (or since you've been trading) in response to environmental concerns?
Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	31.4	30.0	48
No	68.6	70.0	112
Total	100.0	100.0	160

MQ31. In what areas have you changed your practice in response to environmental concerns?
Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Source more environmentally sensitive or sustainable materials	16.4	11.3	18
Use more environmentally sensitive or sustainable production processes	10.4	8.8	14
Choose local suppliers to reduce transport miles	6.4	7.5	12
Choose suppliers with more environmentally sustainable practices	3.5	1.9	3
Choose distributors/retailers with more environmentally sustainable practices	2.2	2.5	4
Recycling	5.0	5.0	8
Other	4.9	5.6	9

Note: Percentages for Northern Ireland based on 160 respondents

MQ32. And have you changed your practice in the last three years in response to other ethical concerns? If so what have you done? (e.g. use fairtrade products)
Specify under 'Other' below

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	14.0	16.9	27
No	86.0	83.1	133
Total	100.0	100.0	160

MQ33. Do you use digital technology in your practice or production?
Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	56.5	50.0	80
Yes – for designing	52.4	56.3	45
Yes – for making	34.4	30.0	24
Yes – other	47.0	51.3	41
Photographing	9.8	12.5	*10*
Marketing	17.2	26.3	*21*
Communications	1.0	0.0	
Other	20.6	12.5	*10*
No	43.6	50.0	80
Total	100.0	100.0	160

MQ34. How much do you use digital technology in your practice or production?
Read out - Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
All the time	28.6	28.8	23
Often	28.9	26.3	21
Sometimes	17.7	21.3	17
Occasionally	24.9	23.8	19
Total	100.0	100.0	80

Note: Applicable to those makers who answered 'yes' in the prior question

MQ35. In 2010, in relation to your craft practice, did you make use of the services provided by any of the following public bodies?
Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Crafts Council	13.9	10.6	17
Arts Council England	5.7	0.0	
Arts Council of Wales	1.5	0.0	
Craft Scotland	5.1	0.0	
Creative Scotland	2.2	0.0	
Craft Northern Ireland	1.3	28.1	45
Arts Council of Northern Ireland	1.3	27.5	44
Crafts Council of Ireland	0.6	13.8	22
None of these	75.9	51.3	82

Note: Percentages for Northern Ireland based on 160 respondents

MQ36. What qualifications and training, including equivalent non-UK qualifications, have you completed that are particularly relevant to craft work?
Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Art/design/craft degree at college or university (BA, BSc)	56.0	53.8	86
Art/design/craft postgraduate degree at college or university (MA/MSc/PhD)	20.2	19.4	31
Foundation course in art/design/craft	16.2	11.3	18
A level and/or O level/GCSE in art/design/craft	16.9	10.0	16
Formal apprenticeship	5.5	5.0	8
Working with experienced makers (not as formal apprenticeship)	6.1	5.6	9
Part-time and short courses	8.9	6.9	11
Adult education classes	5.9	3.1	5
Other craft training	13.8	10.0	16
N/A - No training	15.5	26.3	42

Note: Percentages for Northern Ireland based on 160 respondents

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
First or second degree	60.8	56.3	90
Other qualifications	23.7	17.5	28
None	15.5	26.3	42
Total	100.0	100.0	160

MQ37. What year did you graduate from your most recent degree programme?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
1950's	1.1	1.1	1
1960's	5.2	0.0	
1970's	13.9	14.6	13
1980's	15.4	13.5	12
1990's	23.5	29.2	26
2000's	36.4	33.7	30
2010's	4.5	7.9	7
Total	100.0	100.0	89
Not applicable			70
Total Obs			90
Non-response rate (%)			1.1

Note: Applicable to those makers who hold a first or second degree

	UK	Northern Ireland
Average years	18.2	16.2
Median	15.0	13.0

MQ38. Who supplies the general business skills (such as bookkeeping, website design and marketing) to run your business?

Do not read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
You	88.9	88.8	142
Your partner/family member	13.8	13.1	21
Friends	2.8	1.3	2
Business partner	1.8	1.3	2
Employee	2.2	1.9	3
Outsourced to professionals	20.2	16.9	27
Other	1.0	0.0	

Note: Percentages for Northern Ireland based on 160 respondents

MQ39. Have you had any training in general business skills since you started your business?
Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	42.7	63.8	102
Yes - formal training	*26.7*	*46.9*	*75*
Yes - informal training	*20.8*	*23.8*	*38*
No	57.3	36.3	58
Total	100.0	100.0	160

MQ40. Are there specific business skills you want to develop?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Marketing (inc. web design)	24.7	28.8	46
IT skills	5.9	6.3	10
General business skills	6.2	6.9	11
Craft technology skills	1.1	0.0	0
Bookkeeping/accounting	5.6	5.6	9
Other	3.7	3.8	6
None	52.8	48.8	78
Total	100.0	100.0	160

MQ41. How do you think your business might change in the next three years?
Read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Use new craft-making technologies	36.7	33.1	53
Use new or different materials	49.1	45.0	72
Develop new or different types of product	63.4	61.9	99
More collaborative or partnership working	39.7	35.0	56
Find new markets	58.5	53.1	85
Work more with other sectors as a consultant or practitioner	28.1	25.0	40
Stop craft-making	5.6	5.0	8
Don't expect any change	8.1	8.8	14
Other	13.2	15.0	24

MQ42. If craft is your main career, was it also your first career?
Mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	50.1	52.5	84
No	49.9	47.5	76
Total	100.0	100.0	160

Q45. Gender

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Male	31.4	33.1	53
Female	68.6	66.9	107
Total	100.0	100.0	160

Q46. Which age group do you fall into?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
16-24	1.5	1.3	2
25-34	12.7	15.6	25
35-44	20.8	27.5	44
45-54	25.1	28.1	45
55-64	25.5	20.6	33
65 and over	13.2	5.6	9
Declined to answer	1.3	1.3	2
Total	100.0	100.0	160

Q47. Do you consider yourself dyslexic and/or disabled?

Do not read out - Mark all that apply

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes- dyslexic	11.5	8.1	13
Yes – disabled (excluding dyslexia)	4.1	3.1	5
No	83.4	87.5	140
Declined to answer	1.5	1.3	2

Q51. Were you born in the UK?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
Yes	86.3	88.8	142
Declined to answer	1.5	1.3	2
Other country	12.2	10.0	16
Total	100.0	100.0	160

Q52. How would you describe your national identity?

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
English	18.8	1.9	3
Welsh	3.3	0.0	0
Scottish	8.5	0.6	1
Northern Irish	1.6	30.0	48
British	62.5	35.0	56
Irish	1.4	23.1	37
Other	2.3	2.5	4
Declined to answer	1.7	6.9	11
Total	100.0	100.0	160

Q53. What is your ethnic group?

Read out – mark one box only

	UK	Northern Ireland	
	Percentage	Percentage	Frequency
White British	81.0	50.0	80
White Irish	2.4	34.4	55
White Other	10.0	11.3	18
Black/black British	0.5	0.6	1
Asian/Asian British	0.7	0.6	1
Mixed	0.8	0.0	0
Declined to answer	3.2	3.1	5
Other	1.5	0.0	0
Total	100.0	100.0	160

12. Appendix 5: Retailers

In all, 128 retailers were spoken to. This is not a large enough sample for the results to be considered robust in a formal statistical sense, but the researchers strived to obtain a broad selection of retailers from across the UK. Those contacted included commercial galleries, sales outlets within public galleries and museums, craft shops and online retailers.

The 128 came from:

- England: 86
- Scotland: 27
- Wales: 7
- Northern Ireland: 8

Some of the results of the survey of retailers have been discussed earlier in chapters 4 and 6. Here we highlight some of the more interesting points.

Just over half the respondents (53%) owned their retail outlet, either outright or with others, while a quarter (24%) were managers of the outlet. A quarter (24%) held another senior position in their company.

Key findings:

57 (44%) of the respondents sold only contemporary craft objects (these retailers are referred to as 'specialists'), 71 (56%) sold a mix of goods (these are referred to as 'generalists'). For these 'generalist' retailers contemporary craft accounted for almost half of their revenues (48%).

- Estimated average revenue of specialist retailers: £126,046
- Estimated average revenue of generalist retailers: £121,256.

Craft sales were thought to have remained broadly stable over the last three years. Retailers thought they had been selling more through their websites, which had offset the reported fall in gallery/shop sales.

Specialists were a little less dependent on their gallery/shop sales than generalist retailers were. There was little difference in the importance of tourism between the two types of retailer.

Other findings:

- Two thirds of retailers (66%) had staff who were practising makers.
- Around 40% of respondents received support from public bodies. Local authorities were the most frequently mentioned source of such help.
- Almost half (47%) of the retailers ran an education or outreach programme related to craft.

RQ1 and RG2 were 'filter' questions designed to establish the respondent's eligibility for the survey.

RQ3. Are you the owner of the business or organisation?
Read out - Mark one box only

	Percentage	Frequency
Yes – sole owner	26.6	34
Yes – one of the owners	26.6	34
No - Manager	23.4	30
No – other position	23.4	30
Total	100.0	128

RQ4. What year was the business founded?

	Percentage	Frequency
Before 1940	2.4	3
1940's	0.8	1
1950's	1.6	2
1960's	1.6	2
1970's	9.4	12
1980's	20.5	26
1990's	21.3	27
2000's	38.6	49
2010's	3.9	5
Total	100.0	127
Total Obs		128
Non-response rate (%)		0.8

RQ5. Do you only sell contemporary craft objects?
Mark one box only

	Percentage	Frequency
Yes	44.5	57
No	55.5	71
Total	100.0	128

RQ6. What other goods or services do you sell?
Mark all that apply

	Percentage	Frequency
Heritage craft objects	7.0	9
Fine arts	30.5	39
Prints (incl. framing)	16.4	21
Art and craft materials and supplies	3.9	5
Stationery, cards, manufactured gifts (incl. books)	17.2	22
Run classes or workshops	10.9	14
Café	3.9	5
Other	12.5	16

Note: Percentages based on 71 respondents

RQ7. What percentage of your total sales came from contemporary craft objects in 2010?

Retailers who do not exclusively sell contemporary craft objects	Percentage	Frequency
25% or less	40.0	22
More than 25% but less than or equal to 50%	21.8	12
More than 50% but less than or equal to 75%	16.4	9
More than 75%	21.8	12
Total	100.0	55
Total Obs		57
Non-response rate (%)		3.5

Average (retailers who do not exclusively sell contemporary craft objects)	48.0%

Total sample	Percentage	Frequency
25% or less	19.6	22
More than 25% but less than or equal to 50%	10.7	12
More than 50% but less than or equal to 75%	8.0	9
More than 75%	61.6	69
Total	100.0	112
Total Obs		128
Non-response rate (%)		12.5

Average (total sample)	74.4%

RQ8. What was your sales revenue for contemporary craft object sales only in 2010 (or last financial year if 2010 can't be estimated)?

Average	£88,395

Note: Based on 62 respondents who gave information on sales revenue. Non-response rate: 51.6%

Average revenue for retailers who only sell contemporary craft-objects	£126,046
Estimated average revenue for retailers who also sell other goods and services*	£121,256
Estimated average revenue of whole sample	£123,389

Note: Estimate based on information from question RQ7 and RQ8 (total sample)

* The estimated average revenue for retailers who also sell other goods and services is calculated by multiplying (i) the revenue from cont. craft objects by (ii) the percentage of their total revenue that those sales account for.

Type of retailers	Frequency	Average craft-related revenue	Total craft-related revenue in the sample	% Total craft-related revenue in the sample per type of retailer
Retailers that **only** sell contemporary craft objects	57	£126,046	£7,184,624	63.5
Retailers that **also** sell other goods and services	71	£58,170	£4,130,062	36.5
Total/ Weighted average	128	£88,395	£11,314,578	100.0

RQ9. If your business is more than three years old, how has that craft sales revenue figure changed over the last three years?

Read out – mark one box only

	Percentage	Frequency
Business is less than three years old	7.0	9
Grown considerably	9.4	12
Grown slightly	20.3	26
Stayed steady	23.4	30
Declined slightly	21.9	28
Declined considerably	12.5	16
Don't know	5.5	7
Total	100.0	128

RQ10a. What type of contemporary craft do you sell?
Read out – mark all that apply

	Percentage	Frequency
Jewellery	75.8	97
Ceramics	78.9	101
Textiles and clothes	53.1	68
Furniture	18.0	23
Interior and exterior fittings (e.g. gates, banisters)	8.6	11
Glassware	51.6	66
Stoneware	17.2	22
Graphic craft (including calligraphy)	11.7	15
Paper, books and stationery (excluding graphic craft)	21.1	27
Toys and automata	8.6	11
Other (specify)	41.4	53

Note: Percentages based on 128 respondents

RQ10b. Which category generates the most revenue?
Do not read out – mark one box only

	Percentage	Frequency
Jewellery	49.0	50
Ceramics	20.6	21
Textiles and clothes	7.8	8
Furniture	0.0	0
Interior and exterior fittings (e.g. gates, banisters)	1.0	1
Glassware	5.9	6
Stoneware	0.0	0
Graphic craft (including calligraphy)	1.0	1
Paper, books and stationery (excluding graphic craft)	2.0	2
Toys and automata	0.0	0
Other (specify)	12.7	13
Total	100.0	102
Total Obs		128
Non-response rate (%)		20.3

RQ11. What percentage of all your contemporary craft-related sales does RQ10b account for?

Average	28.8%

Note: Based on 116 respondents that provided information for this question. Non-response rate: 9.4%

RQ12a. Through which channels do you sell contemporary craft?
Read out – mark all that apply

	Percentage	Frequency
Through a gallery or shop	92.2	118
Through your own website	32.8	42
Through other websites	5.5	7
Through social media (blogs, Facebook, Twitter etc)	4.7	6
Through other direct mail (catalogues, directories etc)	4.7	6
Through craft fairs	8.6	11
At events or festivals	13.3	17
At courses or workshops you run	2.3	3
Other (specify)	4.7	6

Note: Percentages based on 128 respondents

RQ12b. Which is the most important channel?
Do not read out – mark one box only

	Percentage	Frequency
Through a gallery or shop	86.7	111
Through your own website	5.5	7
Through other websites	0.8	1
Through social media (blogs, Facebook, Twitter etc)	0.0	0
Through other direct mail (catalogues, directories etc)	1.6	2
Through craft fairs	1.6	2
At events or festivals	2.3	3
At courses or workshops you run	0.8	1
Other (specify)	0.8	1
Total	100.0	128

RQ13. What percentage of all your craft related sales does RQ12b account for?

	Average %
Through a gallery or shop	91.0
Through your own website	64.0
Through other websites	70.0
Through social media (blogs, Facebook, Twitter etc)	--
Through other direct mail (catalogues, directories etc)	80.0
Through craft fairs	67.5
At events or festivals	85.0
At courses or workshops you run	--
Other (specify)	--

Note: Based on 52 respondents who provided information for this question. Non-response rate: 59.4%

RQ14. How have your sales from these channels changed over the last three years?

Frequency	Grown considerably	Grown slightly	Stayed steady	Declined slightly	Declined considerably	Total
Through a gallery or shop	9	31	39	24	15	118
Through your own website	7	11	21	2	1	42
Through other websites		2	5			7
Through social media (blogs, Facebook, Twitter etc)	1	2	3			6
Through other direct mail (catalogues, directories etc)	1	2	3			6
Through craft fairs	1	3	5	1	1	11
At events or festivals	2	3	7	1	3	16
At courses or workshops you run			2		1	3
Other (specify)			3	1	3	7

Percentage	Grown considerably	Grown slightly	Stayed steady	Declined slightly	Declined considerably	Total
Through a gallery or shop	7.6	26.3	33.1	20.3	12.7	100.0
Through your own website	16.7	26.2	50.0	4.8	2.4	100.0
Through other websites	0.0	28.6	71.4	0.0	0.0	100.0
Through social media (blogs, Facebook, Twitter etc)	16.7	33.3	50.0	0.0	0.0	100.0
Through other direct mail (catalogues, directories etc)	16.7	33.3	50.0	0.0	0.0	100.0
Through craft fairs	9.1	27.3	45.5	9.1	9.1	100.0
At events or festivals	12.5	18.8	43.8	6.3	18.8	100.0
At courses or workshops you run	0.0	0.0	66.7	0.0	33.3	100.0
Other (specify)	0.0	0.0	42.9	14.3	42.9	100.0

Note: Percentages based on the number of respondents that state that they use the channel in question RQ12a

RQ16. What percentage of your contemporary craft sales come from makers based...?

	Average %
In the UK	93.7
Outside the UK	6.3

RQ17. Where do the overseas makers whose work you sell mainly come from?
Read out – mark one box only

	Percentage	Frequency
Republic of Ireland	12.7	7
Rest of Europe	56.4	31
North America	3.6	2
Asia	10.9	6
Rest of world	16.4	9
Total	100.0	55

Note: Based on 55 respondents who answered that they sell contemporary craft from 'outside the UK' in the prior question

RQ18. What percentage of your sales of contemporary craft from makers based in the UK comes from each nation?

	Obs	Average %
England	102	68.2
Scotland	98	18.8
Wales	98	7.7
Northern Ireland	98	7.1

RQ19. We are also interested in where your customers come from. Can you estimate the percentage of your sales income for contemporary craft that comes from...?

	Obs	Average %
Local area	104	58.1
Rest of England/Scotland/Wales/N. Ireland (as applicable)	93	24.2
Rest of UK	97	13.9
Republic of Ireland	94	0.9
Rest of Europe	97	3.0
North America	96	1.6
Asia	96	0.5
Rest of the world	98	3.4

RQ20. How important is tourism to your business?
Read out – mark one box only

	Percentage	Frequency
Very important	34.4	44
Fairly important	33.6	43
Neither important nor unimportant	7.0	9
Not very important	18.8	24
Unimportant	6.3	8
Total	100.0	128

RQ21. How many full-time equivalent (FTE) staff do you have, including yourself?

Average	4.5

RQ22. Are you or any of your staff practising craft-makers?
Mark one box only

	Percentage	Frequency
Yes	65.6	84
No	34.4	44
Total	100.0	128

RQ23. Does your organisation participate in 'Own Art' (in England, Scotland and Northern Ireland) or Collectorplan (in Wales)

	Percentage	Frequency
Yes	32.5	39
No	67.5	81
Total	100.0	120

RQ24. Does your business receive any kind of support or advice from any of the following organisations?

	Percentage	Frequency
Crafts Council	19.5	25
Arts Council England	12.5	16
Arts Council of Wales	5.5	7
Craft Scotland	3.9	5
Creative Scotland	6.3	8
Craft Northern Ireland	0.0	0
Arts Council of Northern Ireland	2.3	3
Crafts Council of Ireland	0.0	0
Local authority	25.8	33
No support received	60.2	77

Note: Percentages based on 128 respondents

RQ25. Does your organisation (i.e. not just individual members of staff) run any sort of education or outreach programme related to craft?
Mark one box only

	Percentage	Frequency
Yes	46.9	60
No	53.1	68
Total	100.0	128

RQ26. What does this consist of?
Read out - Mark all that apply

	Percentage	Frequency
Teaching or lecturing at university/ college	7.0	9
Teaching at a school	10.2	13
Running an educational outreach programme	18.0	23
Running workshops	38.3	49
Exhibiting work of students	10.2	13
Holding talks for general public	14.8	19
Other (specify)	5.5	7

Note: Percentages based on 128 respondents

RQ27a. How do you expect your turnover to change over the next three years for 'Your craft-related sales'?

Read out – mark one box only

	Percentage	Frequency
Grow considerably	9.4	12
Grow slightly	38.3	49
Stay steady	28.1	36
Decline slightly	6.3	8
Decline considerably	3.9	5
Don't know	14.1	18
Total	100.0	128

RQ27b. How do you expect your turnover to change over the next three years for 'Your overall business'?

Read out – mark one box only

	Percentage	Frequency
Grow considerably	7.0	5
Grow slightly	38.0	27
Stay steady	31.0	22
Decline slightly	7.0	5
Decline considerably	1.4	1
Don't know	15.5	11
Total	100.0	71

Note: Based on 71 respondents who do not only sell contemporary craft objects (see RQ5)

Q45. Gender

	Percentage	Frequency
Male	23.4	30
Female	76.6	98
Total	100.0	128

Q46. Which age group do you fall into?

	Percentage	Frequency
16-24	0.8	1
25-34	10.9	14
35-44	25.0	32
45-54	34.4	44
55-64	22.7	29
65 and over	3.1	4
Declined to answer	3.1	4
Total	100.0	128

Q47. Do you consider yourself dyslexic and/or disabled?

Do not read out - Mark all that apply

	Percentage	Frequency
Yes- dyslexic	3.1	4
Yes – disabled (excluding dyslexia)	0.8	1
No	93.8	120
Declined to answer	2.3	3

Q48. Do you speak Welsh?

Read out – mark one box only

	Percentage	Frequency
Yes, fluently	28.6	2
Yes, but not fluently	14.3	1
No	57.1	4
Total	100.0	7

Note: Based on 7 respondents from Wales

Q49. Do you speak Welsh in the workplace?
Mark one box only

	Percentage	Frequency
Yes	66.7	2
No	33.3	1
Total	100.0	3

Note: Based on 3 respondents who answered 'yes' to the prior question

Q50. Do you speak Gaelic?

	Percentage	Frequency
Yes, fluently	7.4	2
Yes, but not fluently	0.0	0
No	92.6	25
Total	100.0	27

Note: Based on 27 respondents from Scotland

Q51. Were you born in the UK?

	Percentage	Frequency
Yes	93.0	119
Declined to answer	1.6	2
Other country	5.5	7
Total	100.0	128

Q52. How would you describe your national identity?

	Percentage	Frequency
English	15.6	20
Welsh	3.1	4
Scottish	9.4	12
Northern Irish	1.6	2
British	57.8	74
Irish	1.6	2
Other	2.3	3
Declined to answer	8.6	11
Total	100.0	128

Q53. What is your ethnic group?

Read out – mark one box only

	Percentage	Frequency
White British	86.7	111
White Irish	1.6	2
White Other	6.3	8
Black/black British	0.0	
Asian/Asian British	0.0	
Mixed	0.8	1
Declined to answer	3.9	5
Other	0.8	1
Total	100.0	128

13. Appendix 6: Educators, writers and curators

In all, 71 educators, writers and curators were spoken to. This is not a large enough sample for the results to be considered robust in a formal statistical sense, but the researchers strived to obtain a reasonable selection of retailers from across the UK. The 71 came from:

- England: 53
- Scotland: 11
- Wales: 3
- Northern Ireland: 4

Key findings:

Educators, writers and curators are in many cases pursuing portfolio careers in which their income is derived from a mix of activities primarily in craft or closely related fields (art and design).

- Most of those we spoke to (87%) taught formally, at least part of the time, usually at a higher education institution. Subjects varied: they included craft-making skills, craft appreciation and design.
- Almost 20% of respondents taught informally at venues such as community centres, gallery spaces and colleges, to a wide mix of people.
- Almost 20% had income from writing about craft, typically on a freelance basis, while 11% earned income from curating.
- Almost a third of them reported earning some money from the making of contemporary craft objects, though this was not their main source of income.

EQ1. Firstly, did you earn income from any of the following craft-related activities in 2010?
Read out - Mark all that apply

	Percentage	Frequency
Formal teaching of craft skills in a school or HE/FE institution	73.2	52
Informal teaching of craft skills, such as leading workshops or community projects, or running evening classes	19.7	14
Teaching or lecturing about craft appreciation	14.1	10
Writing about craft	19.7	14
Curating	11.3	8
Working for a craft organisation	4.2	3
Making contemporary craft objects	31.0	22
No income from craft-related activities in 2010	0.0	0
Other (specify)	8.5	6

Note: Percentage based on 71 respondents

EQ2. What was your total craft-related income in 2010?

Average	£54,656

Note: Based on just 22 respondents who provided information for this question. Non-response rate 69%. This average is distorted by some high values, and should be treated with caution.

EQ3. What percentage of your total craft-related income comes from each of your activities?

	Obs.	Average (%)
Formal teaching of craft skills in a school or HE/FE institution	67	57.8
Informal teaching of craft skills, such as leading workshops or community projects, or running evening classes	68	3.8
Teaching or lecturing about craft appreciation	68	7.2
Writing about craft	69	3.0
Curating	69	3.4
Working for a craft organisation	70	1.1
Making contemporary craft objects	67	13.4
‘Other’ craft related activity stated in Q1	70	2.6

EQ4. Did you have any non craft-related income in 2010?
Mark one box only

	Percentage	Frequency
Yes	26.8	19
No	73.2	52
Total	100.0	71

EQ5. How much was your non craft-related income in 2010?

Only five responses were received for this question from the 19 who answered 'yes' to the previous question - too few to provide a meaningful average.

Section A : Education

EQ6. Do you teach formally at an education institution?
Mark one box only

	Percentage	Frequency
Yes	86.9	53
No	13.1	8
Total	100.0	61

Note: Based on 61 respondents who chose at least one of options 1, 2 or 3 in question EQ1

EQ7. What type of institution(s) do you teach at?
Read out - Mark all that apply

	Percentage	Frequency
Higher education	83.0	44
Further education	11.3	6
Adult education	1.9	1
Secondary school	7.5	4
Primary school	1.9	1
Other (specify)	1.9	1

Note: Based on 53 respondents who answered 'yes' to the prior question

EQ8. What subject areas do you currently teach?
Mark all that apply

	Percentage	Frequency
Craft-making skills	45.3	24
Craft appreciation	30.2	16
Art	41.5	22
Design	66.0	35
Other (specify)	20.8	11

Note: Percentage based on 53 respondents

EQ10. Do you teach craft informally e.g. in workshops, community projects or evening classes?
Mark one box only

	Percentage	Frequency
Yes	39.3	24
No	60.7	37
Total	100.0	61

Note: Based on 61 respondents who chose at least one of options 1, 2 or 3 in question EQ1

EQ11. What type of institution hosts the majority of your informal teaching activity?
Mark one box only

	Percentage	Frequency
University/ college	20.8	5
School	4.2	1
Community centre	33.3	8
Gallery/ exhibition space	16.7	4
Studio	12.5	3
Other (specify)	12.5	3
Total	100.0	24

Note: Based on 24 respondents who answered 'yes' to the prior question

EQ12. Can you describe the type of people who attend your informal teaching?
Read out – Mark all that apply

	Percentage	Frequency
Retired people	45.8	11
Working-age adults	66.7	16
Schoolchildren	41.7	10
Pre-school children	0.0	0
Disabled people	16.7	4
Specialist groups (e.g. refugees; ex-offenders)	45.8	11

Note: Percentage based on 24 respondents

Section B: Income from writing and media work

EQ13. In connection with your professional writing and media work, are you...?
Read out - Mark one box only

	Percentage	Frequency
Employed full-time by a publication	21.4	3
A freelance writer, primarily in journalism	7.1	1
A freelance writer, primarily in books	50.0	7
A freelancer, primarily in broadcasting or online activities	7.1	1
Other (specify)	14.3	2
Total	100.0	14

Note: Based on 14 respondents who chose option 4 in question EQ1

EQ14. Do you write solely about contemporary craft?
Mark one box only

	Percentage	Frequency
Yes	57.1	8
No	42.9	6
Total	100.0	14

Note: Based on 14 respondents who chose option 4 in question EQ1

EQ15. What other subjects do you write about?
Do not read out - Mark all that apply

	Percentage	Frequency
Heritage craft	0.0	0
Art or art history	16.7	1
Design	33.3	2
Culture more generally	16.7	1
Other (specify)	33.3	2

Note: Percentage based on 6 respondents who answered 'no' to the prior question

EQ16. Which type of media do you write about contemporary craft for?
Mark all that apply

	Percentage	Frequency
National newspapers	0.0	0
Local or regional newspapers	0.0	0
Crafts magazines	57.1	8
Other arts and design magazines	14.3	2
General interest or lifestyle magazines	7.1	1
TV	0.0	0
Radio	0.0	0
Exhibition catalogues	14.3	2
Academic publications	42.9	6
Online-only publications	35.7	5
Other (specify)	42.9	6

Note: Percentage based on 14 respondents that chose options 4 in question EQ1

Section C: Curating

EQ17. What kind of bodies do you curate for?
Read out - Mark all that apply

	Percentage	Frequency
Public sector museum or gallery (including those in universities)	87.5	7
Private sector gallery	25.0	2
Heritage or tourism attractions (for example: National Trust or English Heritage properties etc)	0.0	0
Private collectors	0.0	0
Private businesses, say with collections of their own or as part of interior design	0.0	0
Craft fairs	12.5	1
Other (specify)	12.5	1

Note: Percentages based on 8 respondents who chose option 5 in question EQ1

EQ18. How did you acquire your curating skills?
Read out - Mark all that apply

	Percentage	Frequency
Degree or other academic qualification (please specify institution under 'Other')	0.0	0
Training in post	0.0	0
Experience	62.5	5
Mentoring or other professional development scheme	0.0	0
Other (specify)	50.0	4

Note: Percentages based on 8 respondents who chose option 5 in question EQ1

EQ19. Do you curate in other art forms apart from craft?
Read out - Mark all that apply

	Percentage	Frequency
Yes – fine art	37.5	3
Yes – design	50.0	4
No	37.5	3
Other (specify)	12.5	1

Note: Percentages based on 8 respondents who chose option 5 in question EQ1

EQ20. Where do you curate exhibitions?
Read out - Mark all that apply

	Percentage	Frequency
The UK	100.0	8
Rest of Europe	25.0	2
North America	25.0	2
Rest of the world	12.5	1
Online	0.0	0

Note: Percentages based on 8 respondents who chose option 5 in question EQ1

EQ21. How many exhibitions did you curate in 2010?

	Percentage	Frequency
None	12.5	1
1	12.5	1
2	25.0	2
3	12.5	1
4	12.5	1
10	12.5	1
100	12.5	1
Total	100.0	8

Note: Based on 8 respondents who chose option 5 in question EQ1

EQ22. Do you feel your curating opportunities are:

Read out - Mark one box only

	Percentage	Frequency
Increasing	37.5	3
Staying about the same	50.0	4
Decreasing	12.5	1
Total	100.0	8

Note: Based on 8 respondents who chose option 5 in question EQ1

Full sample:

Q45. Gender

	Percentage	Frequency
Male	26.8	19
Female	73.2	52
Total	100.0	71

Q46. Which age group do you fall into?

	Percentage	Frequency
16-24	1.4	1
25-34	8.5	6
35-44	29.6	21
45-54	31.0	22
55-64	25.4	18
65 and over	2.8	2
Declined to answer	1.4	1
Total	100.0	71

Q47. Do you consider yourself dyslexic and/or disabled?
Do not read out - Mark all that apply

	Percentage	Frequency
Yes- dyslexic	9.9	7
Yes – disabled (excluding dyslexia)	1.4	1
No	87.3	62
Declined to answer	1.4	1

Q48. Do you speak Welsh?
Read out – Mark one box only

	Percentage	Frequency
Yes, fluently	0.0	0
Yes, but not fluently	66.7	2
No	33.3	1
Total	100.0	3

Note: Based on 3 respondents from Wales

Q49. Do you speak Welsh in the workplace?
Mark one box only

	Percentage	Frequency
Yes	0.0	0
No	100.0	2
Total	100.0	2

Note: Based on 2 respondents who answered 'yes' to the prior question

Q50. Do you speak Gaelic?

	Percentage	Frequency
Yes, fluently	0.0	0
Yes, but not fluently	0.0	0
No	100.0	11
Total	100.0	11

Note: Based on 11 respondents from Scotland

Q51. Were you born in the UK?

	Percentage	Frequency
Yes	83.1	59
Declined to answer	1.4	1
Other country	15.5	11
Total	100.0	71

Q52. How would you describe your national identity?

	Percentage	Frequency
English	9.9	7
Welsh	2.8	2
Scottish	9.9	7
Northern Irish	2.8	2
British	54.9	39
Irish	1.4	1
Other	0.0	0
Declined to answer	18.3	13
Total	100.0	71

Q53. What is your ethnic group?

Read out – mark one box only

	Percentage	Frequency
White British	77.5	55
White Irish	5.6	4
White Other	11.3	8
Black/black British	1.4	1
Asian/Asian British	1.4	1
Mixed	0.0	0
Declined to answer	2.8	2
Other	0.0	0
Total	100	71

14. Appendix 7: Literature review

This section summarises what is already known about the contemporary craft sector's economic impact and characteristics. Earlier studies are also examined, to determine possible areas of comparability.

The literature review draws extensively on three reports commissioned respectively by the Crafts Council and the Arts Council of Wales,[49] a consortium of Scottish organisations,[50] and Craft Northern Ireland,[51] all of which were conducted by McAuley and Fillis of the University of Stirling between 2002 and 2006.

Each of these studies set out to 'explore the socio-economic situation of craft-makers, and to contextualise this with information on the wider crafts economy'. Given their common remit, scope, authorship and research methodology, these three reports can be considered broadly comparable. However, because England and Wales are typically analysed as a single unit, disaggregation and comparison cannot always be undertaken at the 'nation' level.

The review also looks to these studies' predecessors, published by the Crafts Council and its partners in 1983[52] and 1994.[53] These studies were undertaken with similar remits to the three studies in the 2000s. Given differences in sector definitions and methodologies, however, they cannot generally be considered comparable for robust, longitudinal analysis.

[49] McAuley, A. and Fillis, I. (2004) *Making it in the 21st Century: a socio-economic study of crafts activity in England and Wales, 2002 – 2003,* Crafts Council, London.
[50] McAuley, A. and Fillis, I. (2002) *Crafts Businesses in Scotland: a study'*, University of Stirling in partnership with Scottish Arts Council, Scottish Enterprise and Scottish Enterprise, Glasgow.
[51] McAuley, A. and Fillis, I. (2006) *A Future in the Making – socio-economic survey of the craft sector in Northern Ireland*, Craft Northern Ireland, Belfast.
[52] Bruce, A. and Filmer, P. (1983) *Working in Crafts,* Crafts Council, London.
[53] Knott, C. A. (1994) *Crafts in the 1990s.A socio-economic study of craftspeople in England, Scotland and Wales*, Crafts Council, London.

All these studies differ from the current one in two significant respects. First, each of these previous studies limited its analysis of the craft sector to makers. No quantitative analysis of the craft workforce as a whole – including retailers and gallery owners, critics, curators, educators, support agencies and workspace providers – was made.

Second, each of the previous studies focuses on the origination, making and sale of craft objects, and on teaching in formal education settings. Other craft-related activities undertaken by makers, such as consultancy, design and workshop leadership, were not included.

The remainder of this review explores these reports (and others) by theme.

14.1 Sector definitions

Definitions of craft-makers – as reported in the previous studies conducted between 1983 and 2004 – have evolved alongside the priorities of the studies' commissioning bodies and wider shifts in the cultural and policy landscapes.

The 1983 study focused on makers demonstrating 'innovation, design and aesthetic content, and technical competence,' in work that 'occupies the ground between the Arts Council and Design Council.'

The 1994 study introduced a dual definition based on technical competences and materials: individuals needed both to be working in a recognised material (e.g. glass, leather) and to be producing work from within a defined typology (e.g. furniture, jewellery) in order to be regarded as makers. This report also introduced a focus on makers producing 'original objects … in a commercial way' but with 'artistic control of their work' retained 'from conception to completion'. In addition, it introduced specific exclusions for makers working in perishable materials (e.g. florists, cake decorators) and building materials (e.g. thatchers).

The three 2000s studies by McAuley and Fillis did not seek to include or exclude individual businesses from their definition of contemporary craft in the same way as their predecessors, but instead included makers on the basis of their membership of databases held by the commissioning bodies and their partners (primarily craft guilds, societies and associations). In addition, they introduced exclusions of makers who were perceived as not being commercially active (described as 'hobbyists') and / or who described the 'subject or style' of their work as 'traditional'.

The focus on sales of craft objects across each of these studies influenced the questions put to makers and the analysis of their responses. Makers spending less than 30 hours per week on making work and teaching were categorised as 'part-time', regardless of whether or not they were undertaking other craft-related work. The inclusion or exclusion of business management, marketing and administration from this 30 hour allocation was not made clear. Relatedly, the three reports by McAuley and Fillis recognised portfolio working amongst an estimated one-third of all makers, but defined this as 'a mix of part-time craft and non craft-related jobs', rather than as the mix of craft-related (and possibly non craft-related) jobs recognised by other research.[54 55]

This focus on the sale of craft objects also has implications for the way that business turnover and profit were estimated in these reports: income from craft-related activities such as design, consultancy and workshop leadership was excluded.

14.2 Economic impact

The contemporary craft sector is at best under-represented in government business performance data. Incompatibility issues with Standard Industry and Occupational Classifications are common within the creative industries. However, craft is also disadvantaged by the high proportion of freelancers working in the sector, who are often not represented on the business databases most often interrogated for government statistics. As a consequence, craft is the only creative industry sector recognised by the Department for Culture, Media and Sport that is largely excluded from the Department's own economic estimates.

Quantitative 'footprint' analyses of the craft workforce undertaken by Creative & Cultural Skills (CCS), the sector skills council with responsibility for craft, take a different view of craft from that of the national sector development agencies. CCS's statistics exclude retail and education but include small-scale manufacturing and specialist materials suppliers, as well as heritage and rural crafts. Whilst Creative & Cultural Skills has made a calculation of GVA for craft (equating to 12% of the creative industries sector's GVA in 2008[56]), its sector definition is not comparable with that of the current study.

The series of studies commissioned since the mid 1980s by the national development agencies for contemporary craft in England, Wales, Scotland and Northern Ireland therefore provides the most useful baseline evidence of economic impact.

Size of workforce

McAuley and Fillis' work indicated a UK craft workforce of almost 35,800,[57] comprising 29,400 makers in England in 2004, 2,600 in Wales in 2004, 3,500 in Scotland in 2002 and 300 in Northern Ireland in 2006. This workforce included only makers who had agreed that their work was 'contemporary in style' (not 'traditional in style') and who agreed that they worked 'full-time', 'part-time' or 'occasionally for sale' (not 'as a hobby' or 'as a student or trainee').

These estimates suggested a very substantial increase in the craft workforce since 1994, when just under 17,000 makers had been identified in England, Scotland and Wales; and again since 1983 when the workforce had been estimated as being somewhere between 10,000 and 30,000 in England and Wales. However, as mentioned earlier, interpretation of these estimates is subject to shifts in research scope and methodology.

[54] Press, M. and Cusworth, A. (1998) *New Lives in the Making.* Art and Design Research Centre, Sheffield Hallam University, Sheffield, and Crafts Council, London.
[55] Hunt, W., Ball, L. and Pollard, E. (2010) *Crafting Futures: a study of the early careers of crafts graduates from UK higher education institutions.* Institute for Employment Studies, Brighton / University of the Arts London, London / The Crafts Council, London.

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[56] Creative & Cultural Skills (2009) T*he Craft Blueprint: A workforce development plan for craft in the UK,*Creative & Cultural Skills, London.
[57] Exact figures are 35,776 in total, comprising 29,440 makers in England (82% of the UK total), 2,560 in Wales (7%), 3,476 in Scotland (10%) and 300 in Northern Ireland (less than 1%).

Turnover

McAuley and Fillis' research reports estimated a UK sector turnover total of around £1bn, comprising £826m attributable to makers in England and Wales, between £95m and £151m to those in Scotland, and £8m to those in Northern Ireland.

The value of this sector turnover was calculated to have more than doubled between 1994 and 2004 in England and Wales, from £307m[58] to between £826m and £845m, a figure which corresponds reasonably with a market value of £913m estimated for the UK craft market in 2010.[59]

In 2004, the average turnover of individual businesses (from sales of objects alone) was thought to average £25,826 in England and Wales, and was very slightly less in Northern Ireland (in 2006). No directly comparable data was available for Scotland.

Individual business turnover was shown to vary greatly around this average. In particular, all studies demonstrated gender discrepancies regardless of the maker's full-time or part-time work status: across England and Wales, men averaged almost twice the sales revenue of women. Overall, McAuley and Fillis found that turnover averaged less than £10,000 per annum for almost half of all makers across the UK nations: 42% in England and Wales in 2004, 47% in Scotland in 2002 and 48% in Northern Ireland in 2006. More recent figures have suggested a worsening of this situation in Scotland, where 55% reported a turnover of less than £10,000 in 2007.[60]

Methodological differences between the 1983, 1994 and 2004 reports prevent robust longitudinal analysis of turnover at the individual business level. However, statements of opinion give some insight into trends in economic activity. 36% of makers in England and Wales (in 2004) and 30% of makers in Northern Ireland (in 2006) reported making 'all or nearly all' of their income from 'selling craftwork', and 48% of those in Scotland reported (in 2002) that turnover was growing. On the other hand, 29% of makers in England and Wales (in 2004) agreed that their 'customer base is not growing', and 56% reported difficulties in selling their work. Similarly, 65% of makers in Scotland (in 2002) saw 'achieving sales' as their most significant challenge.

Profit

Profit and gross value added (GVA) levels have not been reported at a sector level in the previous research reports.

At the individual business level, profit on sales of craft objects cannot be disaggregated from the available data. The three 2000s studies from McAuley and Fillis use income percentages and broad profit bandings, from which it is not always possible to make mid-range calculations, but which can provide some broad indication of individual business profit. The most commonly 'ticked' profit band was for profits of under £2,500: 28% of makers in England and Wales in 2004 and 17% in Northern Ireland in 2006 assigned themselves to this category. Comparable data was not available for Scotland. (Note that these percentages do not include those people reporting losses.)

Exports

Export of craft objects from English and Welsh makers were reported at £43m in 2004. The proportion of makers exporting from Northern Ireland was far higher: in 2006, over two-thirds of makers from Northern Ireland were said to be exporting beyond the UK, compared with just 18% of those in England and Wales. Strikingly, most (almost two-thirds) of these Northern Irish businesses were reported to be commencing export activity within one year of start-up.

In Scotland 29% of makers were reported to be selling outside the UK in 2002. This proportion had grown to 43% in 2007.[61]

Indirect economic impact

It has been suggested that the craft sector's economic impact is underestimated, even within the craft literature.[62] Three main points have been made in this argument.

[58] Though note that Knott does not supply a direct figure in her report.
[59] Morris Hargreaves McIntyre (2010) *Consuming Craft: The contemporary craft market in a changing economy*. Crafts Council, London.
[60] Craft Scotland maker survey (2007), quoted in Scottish Arts Council (2009) *Futurefocus: Developing Audiences for Scottish Craft,* HI-Arts, Glasgow Grows Audiences and The Audience Business, Edinburgh.
[61] Craft Scotland maker survey (2007), quoted in Scottish Arts Council (2009) *Op. cit.*
[62] Crafts Council (2010) *Craft Sector Profile and Analysis*, Crafts Council, London.

First, all available statistics focus on craft production: the craft sector's stated economic value has focused on makers to the exclusion of craft professionals working at other stages in the value chain, including retailers and gallery owners, critics, curators, educators, and workspace providers.

Second, 'spillover' benefits – or the economic benefits inadvertently derived by one sector from another – are as difficult to capture for craft as they are for other creative and cultural sectors.[63] Schwarz and Yair have demonstrated that craft professionals make a direct contribution to sectors ranging from architecture and product design to retail and advertising, film and television, cultural heritage and fashion.[64] However, the value of this contribution is difficult to quantify beyond isolated examples, such as the licensing value of a specific patent or the additional visitors attracted to a specific place by a craft event.

Third, and in common with other creative sectors rich in 'expressive value' such as dance and visual arts, contemporary craft has an economic role in catalysing new thinking in other, perhaps more economically powerful creative industries. Similarly, the craft-related work undertaken by many makers in a wide range of education and community settings makes an indirect contribution to economic growth by developing the employability of others.[65] These types of intangible economic contribution resist quantification, but are significant nonetheless.

14.3 Maker characteristics

McAuley and Fillis' studies produced analyses of business characteristics and attitudes with some degree of comparability, which are summarised here, along with Schwarz and Yair's work looking into the nature and economic and social contribution of portfolio working in craft.

[63] Frontier Economics (2007) *Creative Industry Spillovers: understanding their impact on the wider economy.* Department for Culture, Media and Sport, London.
[64] Schwarz, M. and Yair, K. (2010) *Making Value: craft and the economic and social contribution of makers*, Crafts Council, London.
[65] *Ibid.*

Maker demographics

Within the existing craft literature, maker demographics have been analysed by age, gender, ethnicity and disability. Limited diversity has been identified as a barrier to the development of the sector's capacity for innovation and market diversification.[66]

Gender

McAuley and Fillis showed that women have generally been much better represented in the craft workforce (at 61% in Scotland in 2002, 66% in England and Wales in 2004 and 68% in Northern Ireland in 2006), than in the UK population as a whole (51%).[67]

The incidence of female entrepreneurship in England and Wales has been reported to be more than twice as high in the craft sector than across the UK working population as a whole.[68] However, women seem to earn less than men: statistics indicate lower revenues from sales of craft objects in all four nations and exports (in Northern Ireland) compared with men.

Longitudinal data is not available across the UK, but in England and Wales a notable increase in female representation – from 57% to 66% – was reported between 1994 and 2004. The findings of the 2006 Northern Ireland survey and a 2010 study of graduate career paths[69] suggest that both younger makers and craft graduates are more likely to be female, implying that female representation will increase still further across the UK.

This predominance of women is sometimes overlooked in the debate about diversity, and is particularly significant in the context of a sector where poor diversity has been identified as a barrier to innovation and market diversification.

[66] Creative & Cultural Skills (2009) *Op. cit.*
[67] McAuley, A. and Fillis, I. (2004) *Op. cit.*
[68] *Ibid.*
[69] Hunt, W., Ball, L. and Pollard, E, (2010) *Op. cit.*

Socio-demographic grouping

Analysis of socio-demographic groupings in the literature is limited. In Hunt *et al*'s study of craft graduates,[70] however, the educational level of respondents' parents was used as a proxy for socio-economic group. The study found that more than half of all respondents were the first in their families to be educated to degree level, and that this had no adverse impact on early career success or satisfaction.

Age

The most common age bracket for makers in the McAuley and Fillis reports was 'late forties', with the exception of Northern Ireland, where the age profile of respondents to the 2006 survey was weighted towards the early thirties. Almost three-quarters of makers in all nations were found to be aged between 30 and 59 during the period of the mid 2000s reports. In 2004, however, the number of young people working in the sector in England and Wales was reported to be increasing.

Ethnic diversity

Whilst remaining unrepresentative of the overall ethnic population, it was noted in 2004 that the craft sector's ethnic diversity in England and Wales appeared to have improved over the previous decade, with the percentage of 'non white British' respondents climbing from 1.2% in England, Scotland and Wales in 1994 to 3.9% in England and Wales in 2004. It should be noted, though, that people answering 'Other' made up much the largest single constituent of this 3.9%.

Scotland, which was not included in the 2004 statistics above, reported in 2002 that 2.1% of respondents were 'non white British,' whilst the 2006 Northern Ireland survey found no non-white respondents.

In 2010, an analysis of UK craft degree students graduating in 2002, 2003 and 2004 suggested a greater ethnic diversity amongst younger, degree-educated makers, with 7% of respondents identifying themselves as being 'from black, minority and ethnic backgrounds'.[71]

[70] Hunt, W., Ball, L. and Pollard, E. (2010) *Op. cit.*
[71] *Ibid.*

Disability

The sector's diversity was found to have improved more markedly in terms of self-identified disability than in terms of ethnicity between 1994 and 2004: in England and Wales the proportion of survey respondents describing themselves as disabled rose from 1.5% to 9% during this time.[72] In Scotland, the percentage of respondents saying they were disabled was reported at 2% in 2002, although higher levels of disability – 10% in 2006 – were recorded in Northern Ireland.

Distinctions between different forms of disability have not been made by the previous UK sector reports. However, a specific investigation into dyslexia was made within a 2010 graduate survey. Demonstrating dyslexia levels of 10% amongst recent craft graduates[73] (compared with the 3% saying they were disabled), this report indicated that dyslexia could be twice as common amongst craft graduates as in the UK population as a whole.[74]

[72] McAuley, A. and Fillis, I. (2004) *Op. cit.*
[73] Hunt, W., Ball, L. and Pollard, E. (2010) *Op. cit.*
[74] http://www.dyslexiaaction.org.uk/Pages/FAQs/ accessed 02/01/2010.

14.4 Business characteristics

Business location

Both the 1994 and 2004 surveys found a broad concentration of makers located in the South East and South West regions of England, and in London. In 2004, McAuley and Fillis found around 18% of all makers were based in each of these three areas, in contrast to just 1.6% found in the North East of England. Other business location data is limited, and no regional breakdown of the data for Scotland is available.

Business locations have not been profiled or analysed for factors such as rurality or deprivation; the identification of 'rural clusters' in the South West of England and in Wales (within the 2004 report) is based on assumptions of rurality in the regions in which they were situated. Recent research by NESTA into creative industry clusters does not offer a useful basis for comparison in this respect, as it is based on the DCMS's selection of Standard Industrial Classifications, which are unable to measure the craft sector.[75]

Although London was the base for almost one-fifth of all makers in the 2004 study, Cardiff and Belfast did not appear to be exerting similar influences on business location in Wales and Northern Ireland. In 2004, two-thirds of all makers in Wales were located within the mainly rural area of 'Mid and West Wales', with only one in six in South Wales (including Cardiff and Swansea). In Northern Ireland in 2006 twice as many makers were reported to be based in County Down as in the predominantly rural County Antrim. Comparable data was not available for Scotland.

Business size

The predominance of one- and two-person micro-enterprises in the contemporary craft sector has been well documented, with 88% of makers in England and Wales (in 2004) and 86% of those in Scotland (in 2002) identifying their business as being 'organised as a sole tradership' rather than as a partnership, limited company or co-operative. Sole trading appeared, in 2006, to have been slightly less prevalent in Northern Ireland, with 78% of businesses organised in this way and a correspondingly higher incidence of business partnerships.

Businesses in Scotland and Northern Ireland appeared to be slightly larger, on average, than those in England and Wales. A higher proportion of businesses in Scotland identified themselves as partnerships in 2002, and a higher proportion of those in Northern Ireland (in 2006) stated that they employed two people or more, full-time.

Employment by craft businesses in Scotland appeared at this time to be higher than elsewhere: 60% of businesses in Scotland identified themselves as employers (in 2002), compared with 30% in Northern Ireland in 2006 and 5% in England and Wales in 2004, although these figures may have reflected some confusion between definitions of employment.

There is no real evidence of any trend either towards or away from sole trading. Whilst at first glance the literature suggests an overall increase from 76% in 1994 to 88% in 2004, this can partly be accounted for by the lower levels of sole trading evident in Scotland, which was not included in the 2004 study.

Business longevity

Research has suggested that craft businesses tend to sustain yet evolve over time, to accommodate changing life circumstances such as parenthood or caring for elderly relatives, and to allow time for new learning activities.[76] [77]

Makers' business survival rates have been shown to be strong in comparison with the creative industries and wider economy. In 2004, 58.9% of businesses in England and Wales had survived for ten years, compared to a five year survival rate (across the UK, in 2011) of 49.7% in the creative industries and 46.9% in the economy overall.[78] Ten-year survival rates have been found to be slightly weaker in Scotland (at 42%

[75] Chapain, C., Cooke, P., De Propris, L.,, MacNeill, S. and Mateos-Garcia, J. (2010): *Creative Clusters and Innovation: putting creativity on the map*, National Endowment for Science, Technology and the Arts, London.

[76] Hunt, W., Ball, L. and Pollard, E. (2010) *Op. cit.*

[77] Press, M. and Cusworth, A. (1998) *Op.cit.*

[78] Burrows, H. and Ussher, K. (2011) R*isky Business,* Demos, London.

in 2002) than in England and Wales, and much weaker in Northern Ireland (27% in 2006).

Workspace

Working from home was found to be common in the three 2000s surveys: 63% of makers in England and Wales, 69% of those in Scotland and 74% of those in Northern Ireland reported working in this way, figures which, for England, Wales and Scotland, had not changed substantially from the 1994 study. One-third of survey respondents in England and Wales agreed with the statement that 'my workspace is inadequate', and almost half agreed with the statement that 'there is a lack of affordable studio space,' although only 7% identified a lack of space as a factor constraining business growth. Comparable data was not available for Scotland.

14.5 Business activity breakdown

Between one-quarter and one-third of makers were identified as working part-time by the three McAuley and Fillis studies (30% in England and Wales, 28% in Northern Ireland and 22% in Scotland), where 'part-time' equated to less than thirty hours' making per week.

These figures adopt a relatively tight definition of 'work' as excluding craft-related activity beyond the making, exhibition, sale and restoration of craft objects, and the teaching of craft. In all, 42% of the 2004 respondents in England and Wales reported undertaking these types of craft-related work.

Type of materials used

The range of makers' work was categorised in previous studies by material (e.g. wood) and discipline (e.g. jewellery), and showed a consistent focus between 1994 and the three 2000s studies on textiles, ceramics and jewellery.

In 2004, 34% of contemporary makers in England and Wales reported working in textiles, 30% in ceramics and 21% in jewellery. The proportions are broadly similar among makers in Scotland in 2002 and in Northern Ireland in 2006. Both wood and paper were used more often in Scotland and Northern Ireland than in England and Wales, with a higher incidence of jewellery and musical-instrument making in Northern Ireland being offset by lower proportions of makers working in glass and metal.

The focus of newer businesses (established since 2000) indicated a shift towards textiles and jewellery in England and Wales in 2004, together with fashion accessories and millinery. At the same time, the number of makers working in ceramics had declined slightly, while the numbers working with wood, stone carving, lettering and mosaic, toys and musical instruments had decreased more dramatically. Comparable data was not available for Scotland.

The craft landscape, as defined by these materials and discipline-based categories, is necessarily a limited one, as it excludes newer forms of craft practice (such as digital making and performative practices) as well as consultancy and other craft-related work undertaken by makers.

14.6 Education and professional development

Higher Education

High levels of higher education qualifications among makers are well documented in the literature.

A 'full-time art and design course' was the most commonly reported qualification in most of the UK nations, with 64% of 2004 England and Wales-based survey respondents and 56% of those in Northern Ireland (in 2006) following this route. The literature reported a growth in higher education qualifications in England and Wales (from 42% in 1994), although in Scotland it was found that only 35% of respondents held such a qualification (in 2002).

There is some ambiguity in the use of terminologies to describe qualifications and learning experiences. However, the high qualification levels overall are just as common among makers for whom craft is a second career. These makers represented more than half (56%) of respondents to the England and Wales study, 69% of the Scotland study and 62% of the Northern Ireland study.

Despite the popularity of degree level qualifications, most makers across all the UK nations have cited a range of 'qualifications held', including short and part-time courses, and working with experienced makers. In addition, many makers (more than half in Scotland in 2002 and Northern Ireland in 2006, just over one-third in England and Wales in 2004) considered themselves to be 'mainly self taught', despite the multiple qualifications they held.

In England and Wales and in Northern Ireland, female makers have been found to be far more likely than male makers to have engaged in formal education to HE level. Men were more likely to have gained qualifications through apprenticeships, government training schemes, or to have taught themselves: they constituted the majority of the 35% of makers in England and Wales describing themselves in 2004 as 'mainly self taught'. Comparable data was not available for Scotland.

Continuing Professional Development

Self-reported investment by makers in training and other forms of continuing professional development (CPD) has varied widely across studies, although this may partly reflect confusion around the term CPD and its definition, and in particular the inclusion or exclusion of informal and peer-based learning, research and development, and active learning opportunities such as knowledge transfer initiatives.

With this caveat, 43% of makers in England and Wales in 2004 undertook no CPD at all in 2004, with 23% reporting between two and five days of CPD per year, and 16% 11 days or more. Comparable data was not available for Scotland or Northern Ireland. Other research indicates that UK makers on average spend 41 days each year developing new work, itself arguably a form of CPD.[79]

Makers in England and Wales were positive about furthering their creative and commercial development. In the 2004 survey 50% agreed with the statement that 'I enjoy developing my business skills', and almost all respondents agreed that 'it is important to me to develop my creative and professional practice'.[80]

[79] Creative & Cultural Skills (2009) *Op. cit.*
[80] McAuley, A. and Fillis, I. (2004) *Op. cit.*

Schwarz and Yair's research backed up this positive attitude towards CPD, suggesting that successful makers were entrepreneurial in developing their own CPD opportunities. As well as researching and accessing both generic and specialist public sector support, they were also investing time in developing their own peer-learning networks and development opportunities.[81] It was found that CPD opportunities including knowledge transfer programmes and structured mentoring could play particularly transformative roles in business and creative development, helping with the diversification and management of portfolio careers.

In the 2002 Scotland study, makers were asked to consider the impact of previous CPD initiatives on business and creative development. Of the available options (which did not include mentoring or networking), those considered significant by the greatest percentage of makers were start-up grants, specialist business skills and 'advanced skills'.

14.7 Selling and marketing

Routes to market

The craft sector features multiple possible routes to market, yet in 2004 close to half (41%) of all makers in England and Wales reported using just one or two routes for the sale of craft objects. A 2007 Scottish Arts Council report referred to the 'relatively unsophisticated and untargeted tactics' deployed by makers, including reliance on word of mouth and existing showcasing opportunities.[82]

Quantitative data was not available for Scotland in the 2002 study, but in Northern Ireland makers were reported in 2006 to be selling across a wider range of platforms: 19% of makers here were reported to be using one or two routes to market, but a similar proportion to be using three, four or five routes.

In 2004, commissioning was (as in 1994) the most popular reported route to market amongst makers selling craft objects. For the 70% of

[81] Schwarz, M. and Yair, K. (2010) *Op. cit.*
[82] Craft Scotland maker survey (2007), quoted in Scottish Arts Council (2009) *Futurefocus: Developing Audiences for Scottish Craft,* HI-Arts, Glasgow Grows Audiences and The Audience Business, Edinburgh.

makers in England and Wales selling in this way (72% in Northern Ireland in 2006 and 65% in Scotland in 2002), commissioning produced nearly 50% of all sales revenue. Selling craft objects direct from the workshop had also remained a popular route to market. 50% of makers in England and Wales were selling in this way (51% in Scotland and 63% in Northern Ireland), generating 35% of their sales revenue.

In 2004 temporary exhibitions and galleries generated 40% of sales revenue (42% in Scotland in 2002) for the 58% of makers in England and Wales selling in this way. Whilst this figure represented an increase since the 1994 study, domestic selling at craft fairs and markets had dropped in popularity amongst makers based in England and Wales, from 42% in 1994 to 38% in 2004. Nonetheless, the contribution of this route to market for those employing it had remained significant, at 37% of sales income.

In all, 19% of makers in England and Wales reported selling from between six and ten permanent shop or gallery outlets in 2004, but two-thirds of makers had a retail base of five outlets or fewer. Comparable data was not available for Scotland or Northern Ireland.

Business-to-business sales were reported to be less common than business-to-consumer sales in England and Wales in 2004. Despite this, direct sales to retailers and through trade fairs produced around one third of all sales income for the 31% and 13% (respectively) of makers selling in these ways. Business-to-business sales were reported to be made by a higher percentage of makers in Scotland in 2002, where 44% were selling to retailers and 24% through trade fairs, and a slightly lower percentage in Northern Ireland in 2006, where 26% were selling to retailers and 15% to wholesalers.

Online selling was not tracked in McAuley and Fillis' reports, although 26% of makers in England and Wales stated that they anticipated undertaking 'sales and marketing' work online in future.

Marketing

Multiple marketing strategies appeared to be common in the mid 2000s, although it is not clear with what frequency makers were employing the full range of marketing activities they listed. In 2004, 18% of makers in England and Wales (and 28% of makers in Northern Ireland in 2006) reported using one or two marketing methods; 29% (and 36% in Northern Ireland) reported using three or four; and 25% reported using five or six. In 2004 28% of makers in England and Wales reported using seven or more marketing methods, while 35% in Northern Ireland in 2006 reported using five or more. No comparable data was available for Scotland.

In 2004, 42% of makers in England and Wales (and a similar percentage in the other UK nations) reported marketing their work online. However, a significantly higher percentage reported marketing by producing printed literature (63% in England and Wales in 2004, 66% in Scotland in 2002, and 70% in Northern Ireland in 2006) and listing their work on registers and slide indexes (54% in England and Wales, 45% in Scotland and 34% in Northern Ireland).

Clearly, the 2004 report pre-dates the diversification of web-based marketing opportunities around social networking and other forms of user-generated content, and does not therefore distinguish between different types of online marketing activity – brand-building through social media, for example.

A significant proportion of makers working in the mid 2000s considered selling activities to be marketing opportunities in themselves: exhibitions, personal selling, craft fairs and open workshops functioned in this way for 57%, 55%, 31% and 25% of respondents respectively in England and Wales. In terms of media, advertising in newspapers and magazines was used by 14% of makers (in England, Wales and Northern Ireland), although around twice as many (32% in England and Wales, 29% in Northern Ireland) reported editorial coverage of their work as a marketing tool. Again, no comparable data was available for Scotland.

Business aspirations

Growth aspirations amongst craft businesses have generally been found to be widespread but usually modest, and concentrated among women. In 2004, 71% of craft businesses in England and Wales[83] (80% in Northern Ireland in 2006) wanted to grow, an increase on the 54% who, in 1994, wished to 'increase production'. Growth aspirations tended to

[83] McAuley, A. and Fillis, I. (2004) *Op. cit.*

be 'moderate' rather than 'substantial' (for 56% of respondents to the 2004 survey), although an aspiration for growth among women was found to be significantly higher than among men. Figures for Scotland in 2002 were similar, but not analysed by gender.

Only 5% of respondents in England and Wales were seeking (in 2004) to fulfil their growth aspirations by working internationally (although 63% of makers in Scotland in 2002 wished to sell internationally). Still smaller numbers were looking to specified niche markets such as architects, designers, tourists, public bodies and corporate clients for growth. 22% wished to target 'affluent, discerning, educated people', 15% private collectors, and 10% exhibitions, galleries and craft events.

Networks

Makers have typically been found to enjoy the independence associated with sole trading, yet also to value interaction, peer support and collaboration. Schwarz and Yair[84] found makers positioning themselves within a network of other creative professionals, which groups and regroups to meet the needs of different clients, to develop new work, and to gain and reciprocate professional support. Gauntlett[85] has suggested that, as online technologies become increasingly sophisticated, creativity – and making in particular – is likely to become an increasingly collaborative activity.

In 2004, McAuley and Fillis reported that almost one-third of respondents in England and Wales were working collaboratively, predominantly with another maker (44%) or with a manufacturing / production company (37%). The majority (68%) of those not working collaboratively stated they 'would be willing' to do so, and a still higher proportion of all respondents (79%) said that they enjoy interacting with other craftspeople despite also enjoying working on their own.

There was no comparable data available for Scotland, but collaboration in Northern Ireland appears to be still more common: here, almost three-quarters of makers in 2006 worked in collaboration with others, most often on production (32%) or design / production (23%), and 79% of those working alone stated they would be willing to collaborate.

[84] Schwarz, M. and Yair, K. (2010) *Op. cit.*
[85] Gauntlett, D. (2011) *Making is Connecting*, Polity Press, Cambridge.

It was suggested in the 2006 Northern Ireland report that collaboration could be one solution to the capacity issues blocking business growth mentioned earlier. Schwarz and Yair, however, suggest that collaboration between makers often serves to stimulate ideas and generate new creative opportunities, encouraging growth in terms of intellectual property rather than increasing capacity.

Their work also suggested that many makers' networks and collaborations are informal, and that achieving a balance between time spent working alone and collaboration can be beneficial to creativity. This flexible, networked approach, combined with low levels of capital investment and low dependency on extended supply chains, has been said to provide some resilience to economic downturn.[86] At the same time, it is thought to enable innovation by drawing together disparate yet complementary knowledge and skill sets whilst extending core business and creative capabilities.[87]

In Northern Ireland, the need for networking has been reflected in relatively high levels of membership of formal craft associations: 40% of makers in 2006 were members of local or regional groups, and 6% were members of national guilds. In England and Wales in 2004, membership of formal associations was found to be less common, at 27% of makers, perhaps reflecting the informal, peer-led nature of many networks and collaborations.

[86] Crafts Council (2009) *The Crafts Sector Adapts to the Credit Crunch*. Online publication, accessed 20/02/2011. http://www.craftscouncil.org.uk/professional-development/maker-development/credit-crunch-feature/crafts-sector-adapts/
[87] Crafts Council (2009) *Crafts Council Profile and Analysis*. Online publication: www.craftscouncil.org.uk/files/.../craft-sector-profile-and-analysis.pdf... , accessed 20/02/2011

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15. Appendix 8: Methodology

The aim of this project was to understand the full range of activity in the contemporary craft sector, and its economic impacts. As such, the process was not simply confined to studying makers – other aspects of the craft 'business', such as retailing and curation were also to be explored. This contemporary craft mapping study is also the first major one to be carried out simultaneously across England, Scotland, Wales and Northern Ireland.

The centrepiece of the exercise was a large phone survey of more than 2,000 respondents. However, before the survey could be conducted the researchers needed to familiarise themselves with the current issues in the sector. This process took place in a number of ways. The first of these was a detailed literature review (included as appendix 7). It raised a number of issues which were dealt with in the following ways.

Definitions of the contemporary craft sector

Following the line taken by the three studies carried out in the 2000s, the decision was made in this research to let survey respondents self-define the work they make, sell or write about as 'contemporary' (or not).[88] The databases on which the survey drew were labelled as 'craft' databases in one form or another, so a degree of self-selection among potential respondents had already taken place.

The researchers also allowed for a wide variety of self-descriptions alongside the term 'craft-maker'. Individuals not identifying themselves as 'makers' but instead as applied artists, designer-makers or another relevant term were asked if other people might consider them to be craft-makers. Those responding positively were included in the survey.

[88] The survey issued in Scotland was adjusted to make clear that makers who describe their work as 'indigenous' were to be included. Creative Scotland defines indigenous crafts as 'those which have their origins in the cultures of Scotland' – and wanted makers who are taking such practice forward and innovating to be included.

This methodological choice is consistent with research showing that makers often adopt flexible identities, altering the way they describe themselves and their work to suit different roles and clients.

'Whole sector' approach

This research also looked at the whole sector, enabling all craft-related aspects of people's work to be valued as part of their creative and business practice. This involved:

- The introduction of detailed questionnaires for retailers and for educators, writers and curators, as well as for makers.
- The introduction of a retailers, curators and educators focus group, in recognition of the thinner evidence base in these areas.

Focus groups

The researchers were able to examine issues in the contemporary craft sector further in the second stage of the research process: the focus groups.

These were held with a wide range of representatives of the craft sector. The first took place in London, with a mixed group of academics, writers, curators and retailers. The second took place with CraftNet, a group of representatives from craft organisations across England. The researchers met again with the CraftNet group in London some months later for a further meeting.

There were also two focus groups for makers. The first of these was held in Edinburgh, and involved makers from Scotland and the North East of England. The second was held in Birmingham, with makers from Wales and the Midlands. The aim of these two sessions was to get the opinions of practising makers to augment the views of the other interest groups.[89]

These focus groups were arranged to try and draw on as wide a spectrum of opinion as possible. However, the timing and location of the focus groups inevitably meant that there were some people who were not able to take part. To capture their views the researchers also carried out a number of interviews with academics, gallery owners (or

[89] It was agreed in the original contract that it would not be possible to hold a focus group involving Northern Ireland makers on cost grounds.

managers) and curators, especially from Scotland, Wales and Northern Ireland (who were not able to take part in the first focus group because of timing issues).

The focus groups and in-depth interviews were backed up by a steering group made up of representatives from all four nations of the UK from the sponsoring organisations,[90] together with an independent adviser to offer an outside perspective. The researchers and the steering group met regularly to discuss and review progress and to confirm the direction of the project.

Diverse practice

The literature review and the focus groups suggested that there has been a diversification of craft practice in recent years. To reflect this, the following approaches were integrated into the survey questionnaire.

- A redefinition of 'portfolio working', from the 'mix of part-time craft and non craft-related jobs' described in previous studies, to a range of craft-related (and possibly non craft-related) work.
- An analysis which considers craft-related business-to-business work, retail, education and other consultancy services, CPD and business management/ administration as elements of the maker's professional practice, alongside the making of craft objects.
- The collecting of fine-grained data around craft-related and non craft-related roles, and the proportion of income gained from / time spent on each, to support this analysis.
- The investigation of a range of roles – including curatorship, writing, design and private tuition – within the two makers' focus groups.
- The careful wording of surveys and focus group questions to be inclusive of a wide range of practices. For example, the terms 'digital media' and 'mixed media' are added to the list of more conventional material specialisms (e.g. 'glass', 'leather') carried over from previous surveys.
- A distinction was made between the use of digital technologies for practice and production, and their use for business, networking and marketing purposes.
- Introducing survey and focus group questions relating to business skills development and other forms of public sector support.
- Introducing survey and focus group questions drawing out makers' work as consultants (for both the private and public sectors).
- Creating a distinction in the surveys between teaching in both formal and informal education settings, which ensured that both are captured. This is different from earlier studies, which defined teaching work solely in terms of formal education 'in schools and colleges'.

The surveys were also designed to provide a more fine-grained analysis of selling routes. Direct selling (from maker to consumer) and online marketing were thought to have become more important; questions were devised to explore this in more detail. For example, distinctions were made between online sales conducted on a business' own website and those on third-party websites or via social networks.

Phone survey questionnaires

There were three questionnaires in all - one for those who saw themselves primarily as makers, one for those who saw themselves primarily as retailers, and one for those who saw themselves as educators, writers or curators. The questionnaires were drafted by BOP Consulting, drawing on the interviews and focus groups, as well as the questions asked in the previous studies in 2004 and 1994 (to enable some comparisons to be made across time). The questionnaire drafts were shared with the steering group, who passed on their comments and thoughts. This process went through a number of iterations, with each re-draft being shared with the steering group.

Once the questionnaires had been agreed, pilot interviews were conducted to test the effectiveness and 'understandability' of the questionnaires. The results of the pilots led to some minor adjustments being made to the questionnaire structure.

[90] Crafts Council, Creative Scotland, the Arts Council of Wales and Craft Northern Ireland. Apart from Creative Scotland these organisations are the public bodies with primary responsibility for contemporary craft in their various countries. In Scotland, Craft Scotland fulfils that role – their database formed the basis for the Scottish phone interviews.

Welsh translations of the questionnaires were then prepared for respondents from that country.

Survey databases

The project brief did not extend to producing a comprehensive database of craft businesses in the UK (for both time and budgetary reasons). The following approaches were agreed with the commissioning agencies in each country.

England:
In England, the Crafts Council supplied a database of 7,275 makers. However, it was keen for makers who were not 'on their radar' to be picked up. As part of the project brief, BOP therefore agreed to create its own database of business names from which approximately half the phone interviews for England were to be drawn.

This second database was built by BOP Consulting from desk and web research, drawing on publicly available records from associations, guilds, societies, and third-party craft websites, among others. It was designed to have good regional coverage across England. A team of researchers spent a number of weeks compiling this database. In all, 3,044 records were collected in this way.

This database was collected independently of the Crafts Council's database in order that the 'overlap' between the two could be used to make an estimate of the total population of makers in England. A full discussion of the way this was done can be found in section 15.2.

The Crafts Council's database also included some records of makers from Scotland, Wales and Northern Ireland. These were checked against the records of other partners in the project, and used as part of the additional records supplied for those countries.

Scotland:
It was agreed with Creative Scotland that the database of Craft Scotland would be used as the primary database for assessing makers in Scotland. However, it became clear that this database on its own was unlikely to achieve the target number of interview responses (350). BOP Consulting therefore carried out further web searches to locate additional records.

In all, the additional records supplied by BOP were responsible for:

- 27 out of the 361 Scottish makers business interviews (7%)

Wales:
For Wales too, it had initially been agreed that the Arts Council of Wales would supply the database of makers. However, again BOP supplemented this with additional records once it became clear that the database supplied was unlikely to be sufficient in its own right to meet the proposed target (250).

In all, the additional records supplied by BOP were responsible for:

- 74 out of the 325 Welsh makers business interviews (23%)

Northern Ireland:
Craft Northern Ireland supplied the database for the Northern Ireland research. Once again, it was initially agreed that this would be the only source of data used to try and meet the target of 200 interviews, but BOP supplemented it with further desk research of its own.

In all, the additional records supplied by BOP were responsible for:

- 32 out of the 160 Northern Ireland makers business interviews (20%)

Retailers and educators:
The project also required two specialist databases, one for retailers and one for educators/writers/curators. The Crafts Council, whose reach in these fields of activity again stretches beyond England, supplied initial lists for both of these. BOP Consulting then supplemented these with desk and web research, focusing particularly on Scotland, Wales and Northern Ireland, where the Crafts Council's database coverage was thought likely to be weaker.

It should be noted that the number of interviews conducted in these categories was smaller than the samples for makers, and the findings should therefore be regarded as less statistically robust, and treated as indicative. Furthermore, the phone survey was conducted in June and July, when some educators may already have started their summer vacation, and been out of contact.

15.1 Number of interviews conducted and targets

The number of interviews to be conducted was agreed with the partners at the beginning of the process. This depended on certain assumptions about the potential size of the craft community that it might be possible to survey. The targets are shown opposite.

Figure 62 Number of interviews conducted

Completed interviews	Targets	Number achieved
Makers:		
England	1,000	1,001
Scotland	350	361
Wales	250	325
N.Ireland	200	160
Total	**1,800**	**1,847**
Retailers:		
England	N/A	86
Scotland	N/A	27
Wales	N/A	7
N. Ireland	N/A	8
Total	**120**	**128**
Educators/writers/curators:		
England	N/A	53
Scotland	N/A	11
Wales	N/A	3
N. Ireland	N/A	4
Total	**80**	**71**
Overall total	**2,000**	**2,046**

Source: BOP Consulting (2011)

All the targets were achieved except for those for educators and Northern Ireland makers.

Once the interviews were complete, they were validated, 'cleaned' and analysed by BOP Consulting using Stata statistical software.

15.2 Estimate of total population

Although the 'regional' database built by BOP contained just over 3,000 names, there were obvious omissions. Craftspeople who did not have a web presence could not be counted. For data protection reasons the researchers were not able to access the records of many guilds and societies (although some do publish members' details online). Not all websites published the contact details of individual makers, having instead a single contact address for the website as a whole, while makers who appear on more art-oriented websites, such as those for artists' studios complexes, may also have been missed. For these reasons, it was not possible to assume that BOP's web searches, even when combined with the Crafts Council's own records, gave a comprehensive list of makers' businesses in England. A way was therefore needed to produce an estimate of the true population.

After BOP collected its 'regional' database it had to be checked for duplicates against the Crafts Council's records. The check found that of the individual records (i.e. excluding a small number of companies and others) 924 out of 2,991 also appeared on the Crafts Council's database: 30.9%. Based on this, the researchers made the assumption that a randomly selected crafts business in England has a 30.9% chance of being on the Crafts Council's database.

However, the project was intended to look just at economically active contemporary craft businesses. In addition, databases inevitably become less accurate over time – people change jobs, retire, or change their practice. A way therefore also had to be found to allow for these changes. BOP did this by looking at the responses recorded by RMG Clarity, the market research firm commissioned to carry out the phone survey interviews.

In the majority of cases, when RMG Clarity tried to contact someone from the Crafts Council's database, they were unable to obtain a response –

people were out, or an answerphone intervened, for example. Clearly, BOP is unable to say with certainty whether such people work in contemporary craft.

Where someone did answer, RMG Clarity recorded the type of response they received. A percentage of those they spoke to were clearly not contemporary craft-makers. There were a number of duplicated records within the database (i.e. people were called twice), there were people not in the target group, some who had retired, some who didn't work in contemporary craft, and some who were not makers. Combining these groups (who are not contemporary craft-makers) with the 'successful' responses (those people who are contemporary craft-makers) enables BOP to estimate what proportion of the Crafts Council's database of craftspeople are economically active contemporary craft businesses.

In all, there were 223 people who were definitely not contemporary makers and 596 who were. This implies that, of those BOP can talk about with certainty, 72.8% were contemporary craft-making businesses. This estimate can be applied to the whole database.

The researchers were then able to work out an estimate of the contemporary craft business population in **England**.

- Total number of records on Crafts Council's database: 7,275.
- Of these, 72.8% are assumed to be economically active and working in contemporary craft: 5,296.
- If this represents 30.9% of the assumed total population, then the total population for England is 17,133, or say **17,150** after rounding.

For Scotland, Wales and Northern Ireland BOP was not asked to develop an additional database (although we did do the additional web searches described above). In these cases, therefore BOP has to make certain assumptions about the databases supplied in order to produce an estimate of the population. In particular, it has been assumed that the comprehensiveness of their coverage of their craft population is the same as has been estimated for the Craft Council's coverage of its 'England' population: 30.9%. BOP has then used the figures compiled by RMG Clarity for each country to assess the proportion of each database who are economically active and working in contemporary craft. These were 75.5% in Scotland, 78.7% in Wales and 46.6% in Northern Ireland.

This latter figure reflects the higher proportions of those contacted in Northern Ireland who said they were retired, not in the target group, not working in contemporary craft, or not a maker.

Therefore, for **Scotland**:

- Total number of records on Craft Scotland's database: 1,363
- Of these, 75.5% are assumed to be working in contemporary craft: 1,030
- If this represents 30.9% of the assumed total population, then the total population for Scotland is 3,332, or say **3,350** after rounding.

For **Wales**:

- Total number of records on the Arts Council of Wales's database: 587
- Of these, 78.7% are assumed to be working in contemporary craft: 462
- If this represents 30.9% of the assumed total population, then the total population for Wales is 1,495, say **1,500** after rounding.

For **Northern Ireland**:

- Total number of records on Craft NI's database: 694
- Of these, 46.6% are assumed to be working in contemporary craft: 323
- If this represents 30.9% of the assumed total population, then the total population for Northern Ireland is 1,048, say **1,050** after rounding.

It should be stressed these are estimates – the exact size of the sector remains unknown.

Summary of estimated number of contemporary craft businesses and their percentage of the UK total:

Figure 63 Population estimate

Country	Population estimate (rounded to nearest 50)	Percentage of UK total
England	17,150	74.4%
Scotland	3,350	14.5%
Wales	1,500	6.5%
Northern Ireland	1,050	4.6%

Source: BOP Consulting (2011)

15.3 Calculation of GVA

BOP Consulting also prepared a calculation of the Gross Value Added of the contemporary craft sector.

Figure 64 Calculation of GVA

Indicator	UK	England	Scotland	Wales	Northern Ireland
Craft related income	£19,827	£19,774	£20,920	£18,594	£18,925
Population	23,050	17,150	3,350	1,500	1,050
Population (%)	*100*	*74*	*15*	*7*	*5*
				£27,891	£19,871
Turnover/GVA ratio 1/	0.49	0.50	0.23	0.54	0.89
GVA (£000) (Total craft related income x ratio)	£223,936	£169,558	£16,119	£15,061	£17,685
GVA (%)	*100*	*78*	*7*	*7*	*8*

Source: Source: BOP Consulting (2011). 1/ Ratios published by ABI (2008) for the Creative Industries

16. Appendix 9: Consultees

Many people contributed to this report through their participation in focus groups, interviews, steering group meetings and CraftNet meetings. BOP Consulting would like to thank them all for their help.

Steering group:

Dr Helen Bennett, Portfolio Manager, Creative Scotland

Rachel Brockhurst, Research and Information Officer, Crafts Council

Nathalie Camus, Senior Applied Arts Officer, Arts Council of Wales

Caroline Docherty, Portfolio Partnership Manager, Creative Scotland

Alastair Evans, Development Partnership Officer, Creative Scotland

Rosy Greenlees, Executive Director, Crafts Council

Amanda Jones, Director of External Relations, Crafts Council

Sarah Jones, Research Officer, Arts Council of Wales

Joe Kelly, Director, Craft Northern Ireland

Prof. Sara Selwood, Independent adviser

Helena Ward, Portfolio Manager, Creative Scotland

Claire West, Director of Programmes, Crafts Council

Administrative support was provided by Rachel Brockhurst and Jennie Andersson of the Crafts Council.

Interviewees:

Philip Hughes, Director, Ruthin Craft Centre

Prof. Georgina Follett, Deputy Principal, University of Dundee

Dr Elizabeth Goring, former Principal Curator, National Museums Scotland

Robert Livingston, Director. HI Arts

Dr Joseph McBrinn, Lecturer in History and Theory of Design, University of Ulster

Kim Mawhinney, Head of Art, National Museums Northern Ireland

Andrew Renton, Head of Applied Art, National Museum of Wales

Ralph Turner, freelance curator working in Wales (formerly Crafts Council)

Prof. Moira Vincentelli, Professor of Art History and Curator of Ceramics, Aberystwyth University

Emma Walker, Chief Executive, Craft Scotland

Focus group with writers, academics, curators, gallerists (London)

Pamela Buxton, Journalist and editor of BD Reviews

Lesley Craze, Owner, Lesley Craze Gallery

Janis Jefferies, Professor of Visual Arts, University of London, Goldsmiths

Martina Margetts, Senior Tutor in Critical and Historical Studies, Royal College of Art

Kathleen Slater, Assistant Director of Contemporary at Adrian Sassoon (Gallery)

Timothy Wilson, Keeper of Western Art, Ashmolean Museum, Oxford

Focus group with makers from Scotland and the North East of England (Edinburgh)

Catriona Baird, Curator of craft exhibitions

Jo Barker, Tapestry weaver

Stephen Bottomley, Jewellery maker (and academic)

Mhairi Corr, Creates sculptures and figurines in paper pulp

Lorna Fraser, Maker in ceramics

Maureen Hodge, Tapestry weaver

Dorothy Hogg, Jewellery maker

Tessa Holland, Jewellery maker

Anna King, Sculptor in paper and fibres

Helena Seget, Maker in ceramics

Fiona Thompson, Maker in ceramics

Sue Woolhouse, Glass artist

Focus group with makers from Wales and the Midlands (Birmingham)

Angus Eickhoff, Metal worker/artist and blacksmith

Clare Gage, Maker in textiles

Amber Hiscott, Glass artist

Lucy Le Feuvre, Maker of installation/sculptural pieces

Cathy Miles, Maker working in metal and wire

Pea Restall, Maker in ceramics

Teresinha Roberts, Artist and sculptress

Miranda Sharpe, Jewellery maker

Owen Thorpe, Maker in ceramics

Gizella Warburton, Maker in textiles and mixed media

Michele White, Jewellery maker

David Wright, Potter

CraftNet group (meetings in Birmingham and London)

Liz Cooper, Craft Development Curator, Smiths Row

Kate Day, Director, Manchester Craft and Design Centre

Deirdre Figueiredo, Director, Craftspace

Jackie Lee, Relationship Manager Visual Arts (Crafts and Workspace Development), Arts Council England

Izzy McDonald Booth, Craft and Design Retail Manager, National Glass Centre

Simon Olding, Director, Crafts Study Centre

Alison Plumridge, Director, Smiths Row

Tina Searle, Chief Executive, Craft Central

Erica Steer, Director, Devon Guild of Craftsmen

Kate Stoddart, Independent curator