

Crafts Council

The Market for Craft

Commissioned by the
Crafts Council and Partners

May 2020





Cyngor Celfyddydau Cymru
Arts Council of Wales



**Contemporary
Visual Arts Network**



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Crafts Council: The Market for Craft

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Foreword

This report launches in a turbulent market as craft businesses, alongside much of the rest of the economy, face enormous economic challenges caused by the Covid-19 virus. As makers look to secure their futures and to rebuild and strengthen their practice, the findings are a rich resource to help us interrogate and advance the vital roles of makers and consumers, as well as the galleries, fairs, markets and businesses that unite them.

The third in our historical analyses of the market for craft, we commissioned this report in response to increasing intelligence that the market was expanding and diversifying. The evidence provides direction for makers to develop their businesses, understanding in much greater depth who their consumers are and what drives their appreciation of craft. It confirms how our passion for craft has increased craft sales from £883m in 2006 to over £3bn in 2019.

The findings reveal that there is a growing new generation of younger craft consumers. Savvy buyers, they like collecting and know what they want. They represent a significant shift in patterns of consumption, as craft becomes more mainstream.

We now need a different approach to economic development to rebuild the market for craft, growing our own resourcefulness and showcasing how craft can help to generate sustainable, domestic economies at the same time as reaching broader international markets. The Crafts Council

will be working closely with partners, businesses and governments, using the findings to inform our actions to strengthen our sector.

I am very grateful to our UK partners for their commitment and expertise in driving this research forward with us, as well as to Crafts Council staff:

Arts Council of Wales

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Contemporary Visual Arts Network

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Julia Bennett,
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Leah Kahn,
Creative Programmes Coordinator

Our thanks also to report authors Morris Hargreaves McIntyre for their excellent analysis and continuing understanding of the market for craft.

Rosy Greenlees,

Executive Director, Crafts Council

May 2020



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Executive Summary

This study is the third in a series of research projects which analyse the state of the craft market, looking at how it has evolved and how infrastructure and needs have changed since the two previous studies, also conducted by Morris Hargreaves McIntyre. The first in the series *Making it to Market* (Morris Hargreaves McIntyre for Arts Council England) was conducted in 2006, with the second study, *Consuming Craft* (Morris Hargreaves McIntyre for Crafts Council) undertaken four years later in 2010.

Craft is now essential to our lives

How recent trends are shaping consumer behaviour

Craft is no longer a peripheral or isolated area of specialist interest: it is now firmly established in the mainstream. Social trends, that were discerned as impacting on the crafts sector in 2010, continue to wield their influence on public values and behaviour in 2020. The growth in the public's desire for authenticity, for experiences, for ethical and sustainable consumption have helped fuel an interest in making and in handmade objects. Further impetus comes from a concern for wellness and mindfulness, as well as the growing need to switch-off from electronic devices.

These trends have driven the success of such popular television programmes as *The Great British Sewing Bee* and *The Great Pottery Throw Down*, attracting viewing figures of ~3m on BBC2 and Channel 4.

Craft has also been strongly impacted by the rise of new routes to market and digital selling platforms in the early to mid 2000s, creating more routes to market for makers and ease of search and purchase for buyers. Online craft purchases have grown from 5% of buyers (332k

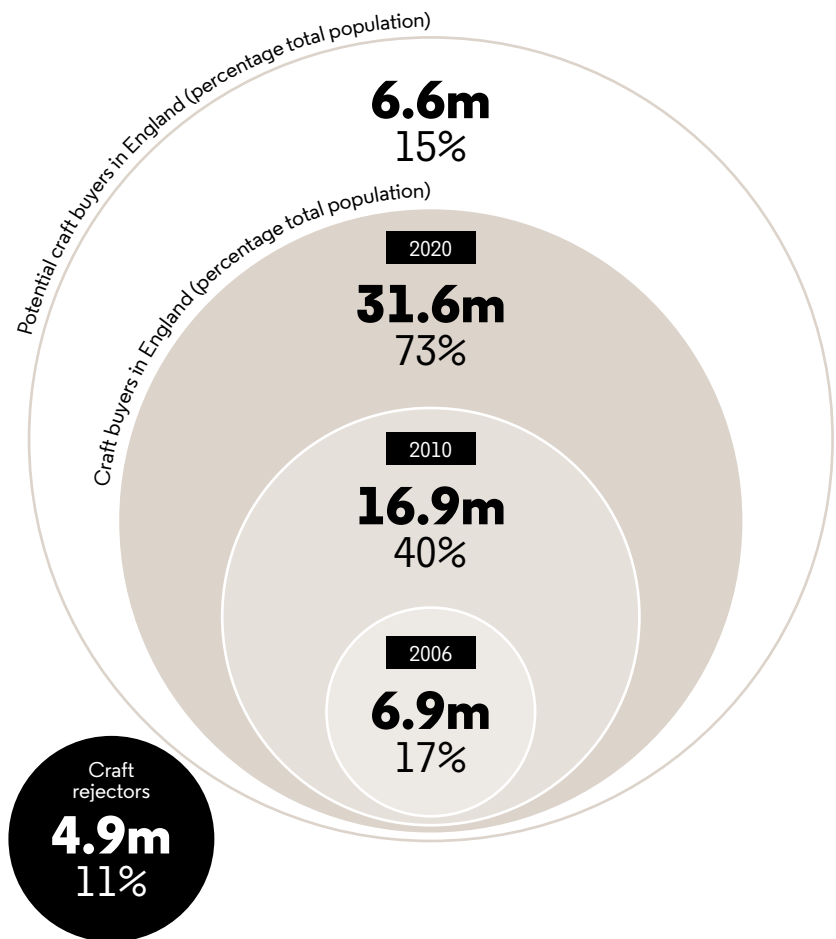
people) in 2006 to 19% of buyers (3.2m people) in 2010 to 33% of buyers (10.3m people) in 2020.

Whilst the emergence of these digital platforms has facilitated the buying and selling of craft, platforms like Amazon have also created expectations amongst buyers on the ease of the buying process – speed; often free postage; item tracking and easy payment options – ‘ease is the new loyalty’. Expectations which makers selling online may sometimes find challenging to compete with.

These developments, in the context of the recession in 2008, and a growing concern for work-life balance, have helped drive the increase in portfolio careers, characteristic of many craft businesses.

These factors have had a clear impact on the size, profile and characteristics of the market for craft both in terms of buyers and makers.

The size and shape of the market in 2020



There has been a dramatic growth in the number of people buying craft between 2006 and 2020 – with 73% of the population buying craft in 2020, the sector has now entered the mainstream market.

Between 2006 and 2020 the number of people buying craft in England increased from 6.9m to 31.6m people. Across the UK, the number of people buying craft is now 37.7m. There has been a four-fold increase in the volume of craft objects bought annually between 2006 and 2020 – from 5.6m to 24.7m objects. The total value of craft sales has increased from

£883m in 2006 to over £3b in 2019. Over the same period, the average price per object has decreased from £157 in 2006 to £124 in 2020.

More egalitarian market conditions and fewer barriers to entry for makers mean that whilst more people are now buying craft, they are buying craft at a lower value. This means that the challenges faced by Master Craftspeople and Established Makers at the higher end of the sector remain similar to those identified in 2006 – they still need to differentiate their skill to justify their higher prices.

Craft consumers in 2020

As craft has entered the mainstream, the majority of the market is dominated by more cautious, cost-conscious buyers. This needs to be recognised in the strategies adopted to promote craft and in the marketing approaches of makers.

Demographically, compared to 2006, the craft market consumers in 2020 are younger, more ethnically diverse, less dominated by graduates and with lower specialist knowledge. Between 2006 and 2020 there has been an increase in the younger age groups, from 17% (1.1m) under 35 in 2006 to 32% buyers (9.1m) in 2020.

Since 2006, 21.5m people have entered the market for buying craft from a living maker. From the demographic changes in the profile of buyers it is evident that younger people make up a significant number of these new entrants.

Amongst these new cautious groups, there are clear life-stage differences in their behaviours; demographics; sources for buying craft and propensity to buy online; media consumption and engagement with social media.

There is significant potential for encouraging these new emerging market cohorts, who are already buying from living makers, to purchase more often, develop discernment, take bigger risks and spend more.

With craft now in the mainstream, we have sub-divided the market in order to better understand the demographics of buyers, what they're buying and where they're buying. The market can be subdivided into nine groups, with two of these groups representing the highest spending, most risk-taking sub groups, with a further four groups representing the greatest potential for developing the market for craft.

Whilst these market sub-groups can be understood in terms of shared demographics and behaviours, in order to target and communicate with potential future buyers it is vital to understand their deep-seated attitudes and values. To this end, we have overlaid the market sub-groups with Morris Hargreaves McIntyre's sector-specific segmentation system – Culture Segments (see page 61 and Appendices).



Craft Scotland showcase at the American Craft Council Baltimore, 2017
© Maximilian Franz

The size and shape of the sector in 2020

Since 2006 and 2010 there have been many new entrants into the crafts sector facilitated by the development of e-commerce and increase in the number of selling opportunities.

The sector is more democratic: makers no longer need to rely on a third party, studio or physical presence to be able to sell in the UK and abroad.

In 2006, there were an estimated 32,000 professional makers in England and Wales, generating a turnover of £826m. In 2020, it is likely that number of makers far exceeds 32,000, with the total volume and value of craft sales having increased three to four-fold over the same period. Online platforms have fuelled much of this growth: in December 2018, Etsy reported that there were 220,000 active sellers in the UK with a further 9,000 makers on Folksy.

The sector is becoming more inclusive in terms of makers' demographic profile – the proportion of disabled makers has more than doubled since the 2006 study, with around a quarter of makers in 2020 having a disability. Craft is succeeding in offering an income stream and creative fulfilment for makers with disabilities, but the sector has to go further to ensure craft is an inclusive space for all ethnicities and genders, with the proportion of BAME makers remaining unchanged compared to 2006 at 2–4% and three quarters of makers identifying as female.

Portfolio careers are commonplace for makers in 2020 with less than half of makers earning a living solely through selling their work. The activities undertaken to supplement income vary according to the level of maker, with established makers

teaching either in formal education or at workshops. Less established makers are reliant on non-craft related employment to supplement their income.

Makers were more likely to be self-taught in 2020 than in 2006, so whilst second career makers are common this was not an uncommon phenomenon in 2006 either – less than half (46%) of makers in 2006 were first career makers.

Income levels for makers remain low compared to the median annual salary in the UK in 2019 which was £30,350 across all employment sectors. Across all maker groups, the majority reported a profit of less than £30,000 from selling their work in the latest financial year. Even amongst Master Craftspeople, only 16% reported profits from selling in excess of £30,000.

The emergence of online platforms since the original makers' study in 2006 has also facilitated international sales of UK craft. Whereas in 2006, 18% of professional makers had ever sold internationally, in 2020 around half (49–53%) of makers had sold work overseas in the previous 12 months. In the makers survey, the US was the largest single market where makers had sold their work overseas.

Makers are harnessing technology to promote their work but need support in optimising their approach. In 2006, 42% of professional makers had their own website. By 2020, 68% of all makers had a website, with Master Craftspeople (84%) and Established Professional Makers (77%) the most likely to promote and sell their work through this channel. Whilst the use of technology is common across all makers surveyed, advice and support in optimising the use of technology

were the training needs identified by the highest proportions of makers, specifically advice or training on social media and promotion (44%) and how to use online platform to sell work (46%). Makers of all levels and experience tend to share similar training needs – Emerging and Early Career Makers have the greatest expressed training needs.

Makers are concerned about the negative impact of Brexit on their work – a quarter (26%) of makers surveyed for this research said that Brexit had already had an adverse impact on their business; a further 22% said they expected it to in the future. The majority of issues makers faced related to rising costs – of materials, of shipping – and a loss of commissions, particularly from international and private clients.

Makers were keen to see help for buyers to identify objects of recognised quality, collectability and originality, underpinned by a campaign to educate and inform them about craft. This support was stronger amongst Early Career and Emerging Makers.

Two-thirds of makers felt that an easily accessible, centralised, signposted searchable database would help with sales, with extended search functions including visual tags, to identify objects based on colour or pattern or style without needing to know a maker's name. Built-in algorithms replicating the 'Customers who viewed this item also viewed ...' approach of online retailers would expose potential buyers to a wider range of makers beyond those they are already familiar with and buying from.

Collect 2020 © Iona Wolff



Market models, intermediaries and the experience economy are shaping the market

The population survey showed that people still prefer buying direct from the maker at craft fairs and craft markets. Amongst younger, digitally native buyers, face-to-face buying is still preferred over online purchasing.

New intermediaries bringing buyers together with makers are deploying retail and merchandising principles to craft. The focus is not only on positioning craft as a high-quality competitor to art, design and fashion, but on building brands through supporting makers with concept development, market focus and making work more collectable at the right price.

New intermediaries are also helping bring trade buyers together with makers – interior designers, architects, commissioners and retail outlets – recognising that makers often lack the skills, confidence and technical scaffolding to do this themselves and that trade buyers can't easily find trusted, professional makers themselves.

New intermediaries such as Yodomo provide makers with an opportunity to build sustainable crafts businesses through diversification into craft experiences, tapping into the continuing, and thriving, experience economy. The population survey identified an ongoing appetite for paid for craft experiences, with 20% of the overall market for craft (7% definitely and 13% probably) indicating that they'd pay to attend a craft workshop in the future.

As well as offering 'active' craft experiences, some makers, where constrained by time and workshop space to offer courses, have diversified into offering behind-the-scenes tours to provide insight into the making process without being 'hands-on'. This interest in going 'behind the scenes' and understanding the creative process is a phenomenon we have observed elsewhere amongst museum visitors, who want to understand conservation processes or how curators and designers approach selecting and displaying objects in exhibitions.



Collect 2020 © Iona Wolff

Export potential: the market for UK craft in New York and Los Angeles

An important element of the market for craft is the potential for UK makers to export craft goods to other countries. The report explores one example of the potential export market in two major US cities – New York City and Los Angeles.

The latest export data on craft from DCMS in 2016 showed that the US was the third largest market for UK craft, accounting for £517m of total exports. In the makers' survey, the US was the most commonly cited market for international sales.

A survey of existing and potential buyers in the New York and Los Angeles Metropolitan Statistical Areas (MSA), indicated that there is a potential market for UK craft of 10m people in these two cities.

The existing market for UK craft in New York and Los Angeles is young, gender balanced, ethnically diverse and highly educated. The existing and potential markets for UK craft are creative, and actively seeking to develop their creative skills through participation in craft courses.

Across New York and Los Angeles, farmers markets (38%) are the most commonly used face-to-face routes to buying. There are some differences in buying behaviours between New York and Los Angeles. In New York, craft and design stores are the most common face-to-face way of buying craft (43%); in Los Angeles existing buyers have most commonly bought at farmers markets (51%) and craft or design stores (50%).

Ethical consumerism is important to existing and potential buyers, with two thirds of existing buyers mindful that the craft objects they consider buying are sustainably produced. Assurance over provenance is also important to this market with the majority (57%) only buying craft if they were sure that the object was individually made.

Motivations for buying craft are more maker-focused than in the UK market overall. Existing buyers of UK craft are also altruistic in their focus, more likely to buy craft in order to support new talent and makers than as a financial investment.

A British look or aesthetic was the most commonly cited reason for buying UK craft. Many buyers in the existing market (particularly New York) have a personal connection to the UK. Existing buyers of UK craft are active and recent buyers, spending an average of \$260 (approx. £210) on their most recent purchase from a UK maker.



Turning Earth Christmas market, London
© Arthur Rummel

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Market buyer group pen portraits

The following pages contain pen portraits for seven buyer groups:

- ① Proto-collector
- ② Adventurer
- ③ Early mainstream
- ④ Mature mainstream
- ⑤ Millennial mainstream
- ⑥ Gen Z mainstream
- ⑦ New entrant

These are the buyer groups identified in this report as ones we recommend that the Crafts Council, partners, and makers more widely, should make the focus of their market development strategies. See pages 59–63 for more explanation about the preferences and buying habits of these groups.

The remaining two buyer groups (Nascent group and Low level traditional) have not been included as pen portraits for the simple reason that we do not recommend these are targeted.

Each pen portrait contains the following information:

- Demographic profile
- Culture Segments profile
- Preferences for different types of craft
- Motivations for buying craft
- Buying behaviours
- Attitudes and values in relation to buying craft
- Social media engagement
- Participation and interest in craft experiences



Market buyer group pen portraits

1. Proto-collector group

6% (2.4m) of the buyer market

RISK TAKER bought from living craft maker (most spent £200+)

Demographic profile



Target Expression and Essence

We would recommend focusing on Expression, who are typically the segment most interested in craft and craft activities, and who are significantly over-indexed in this group of buyers. Makers should also target Proto-collector group Essence, as this segment also significantly over-indexed here, versus the buyer market average.

The Proto-collector group were interested in all craft types

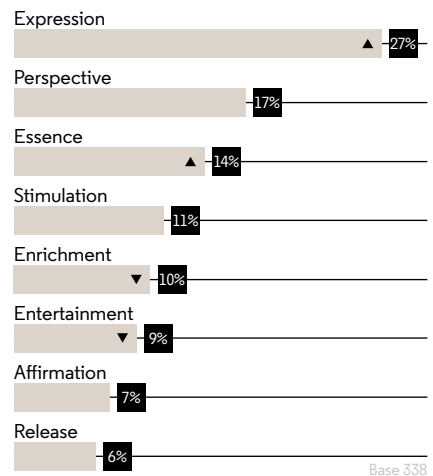
The Proto-collector group of buyers were very interested in all types of craft, and versus the average buyer, were significantly more likely to have bought every artform in the past two years.

This included ceramics (57% versus 31% average buyer), jewellery (52% versus 36%), woodwork (43% versus 29%), glasswork (41% versus 24%), textiles (34% versus 24%) and metalwork (21% versus 10%). In comparison with the average buyer, they were also much more likely to have bought textiles and metalwork over two years ago.

Finally, Proto-collectors were much more interested (versus the average buyer) in purchasing all of these types of original crafts in the future.

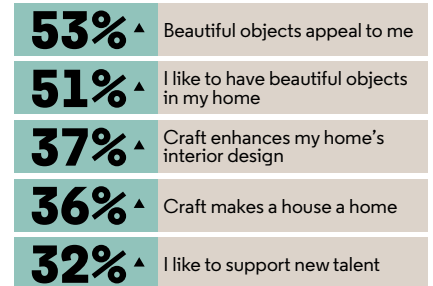
Whilst Expression was the largest Culture Segment for this buyer group, it is telling that Proto-collectors also over-indexed in Essence. Essence are independent, discerning and unlikely to be swayed by mainstream trends or sentiment. They hold quality above all other attributes, and place a high value on exclusivity.

Culture Segments profile



Craft makes a unique gift

Here are the motivations the Proto-collectors over-index in when buying craft.



Average craft item spend was £291

On average, the Proto-collector group had bought thirteen pieces of handmade craft in the past two years. The average buyer had bought seven pieces in this timeframe.

Thinking about their most recent piece of craft, their average spend was £291; 27% said that they had known the maker's name, also higher than the average buyer (15%).

Prolific use of face-to-face channels

Top bricks and mortar buying channels (have bought craft from)



When asked to select where they preferred to buy craft from, Proto-collectors (versus the average buyer) were significantly more likely to pick direct from the maker (20% versus 12%), craft or design shop (13% versus 9%), and Open Studios (8% versus 2%).

Independent-minded PCs reject mass-produced items

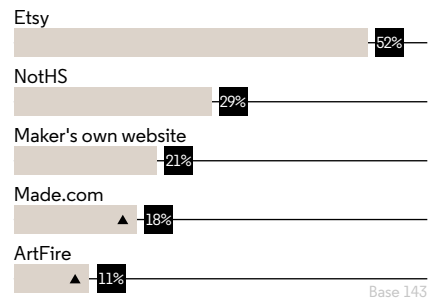
The Proto-collector buyers might have been motivated to buy craft because of its role in making their house a home, but they were significantly more likely than the average buyer to tend to disagree with the idea they'd only buy work that fit their home's space and design (12% versus 8%). They were also significantly more likely to buy something even if they knew people didn't like it (37% versus 24% average buyer). The need for expert advice before buying craft was polarising, with some in this cohort being significantly more likely to say they definitely disagreed with this statement, versus the average (32% versus 26%) and others definitely agreeing (8% versus 3%).

Despite their fairly high spend, many proto-collectors felt they did not buy work with the expectation it would go up in value (26% versus 20%). What was

important to this buyer group were locally-produced (18% versus 13%) and ethically produced items (15%). They were most likely to reject mass-produced items (36% versus 23%).

Maker's own website key channel

Top online buying channels (have bought craft from)



70% of this group said they would buy craft from online retailers in the future; this was comparable to the market average (69%).

ONLINE MEDIA USE

This group over-indexed in many online media types. This included TripAdvisor (42% versus 32%), LinkedIn (26% versus 16%) and iTunes (26% versus 15%).

Proto-collectors were eager to participate in craft experiences

Versus the buyer market average, Proto-collectors had higher interest in craft experiences.

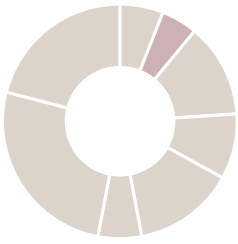
18% ▲ Had been on a craft course or workshop more than 12 months ago

18% ▲ Definitely would pay to go on a craft course or workshop in the future

PROTO-COLLECTORS' CRAFT-RELATED HOBBIES

This group over-indexed in participation of all hobbies tested, including painting, photography, animation and woodworking – with the exception of textile crafts, for which their participation was comparable to the average.

* In the survey 'craft market' was defined as somewhere makers sell their own handmade items



Market buyer group pen portraits

2 . Adventurer group

5% (1.9m) of the buyer market

RISK TAKER bought from living craft maker (most spent £70 to £200)

Demographic profile



Target Expression, Stimulation and Essence

We would recommend focusing on Expression, who are typically the segment most interested in craft and craft activities. Makers should also target Adventurer Essence and Stimulation, as both segments are significantly over-indexed in this group versus the buyer market average.

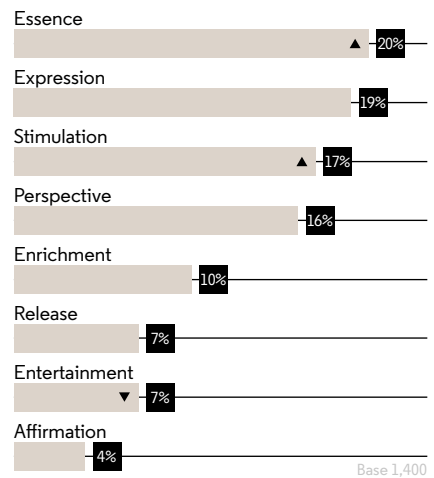
Adventurers had bought, were very interested in buying, a range of craft

With the exception of metalwork, for which their purchasing habits in the past two years were comparable to the average (14% versus 10%), Adventurers were significantly more likely to have bought all other artforms tested in the population survey.

This included jewellery (47% had bought in the past two years in comparison to 36% of average buyers), woodwork (45% had bought, in comparison to 29% of average buyers) ceramics (43%, in comparison to 31% of average buyers), glasswork (36% versus 24%) and textiles (34% versus 24%).

Adventurers were also significantly more likely to say they would consider purchasing craft in every type of artform in the future, versus the average buyer.

Culture Segments profile



Adventurers want to keep skills alive

Here are the craft-buying motivations for which Adventurers over-indexed in versus the average buyer.



Average craft item spend was £113

On average, the Adventurer group had bought nine pieces of handmade craft in the past two years. The average buyer had bought seven pieces in this timeframe.

Thinking about their most recent piece of craft, their average spend was £113; 21% said that they had known the maker's name, significantly higher than the average buyer (15%).

Craft fairs were favoured channel

Top bricks and mortar buying channels (have bought craft from)



When asked to select where they preferred to buy craft from, Adventurers (versus the average buyer) were significantly more likely to pick craft fairs (28% versus 19%), craft or design shop (14% versus 9%), and food and drink market or festival (10% versus 5%).

Adventurers buy what they like and prioritise design over anything else

Adventurers were very keen on locally-produced (19% versus 13% average buyer) and sustainably produced craft items (20% versus 11%).

They felt very strongly that design and the work of designers/ makers was very important to them (61% agreed with this statement versus 45% buyer average), but were less likely than the average buyer to definitely agree that they were more likely to buy craft when they knew the maker or ideas behind a piece (4% versus 8%).

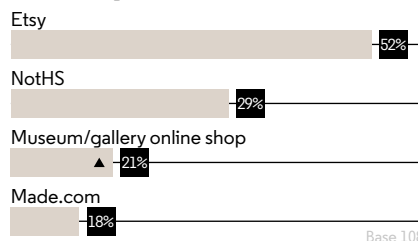
Adventurers did not buy work with the expectation it would increase in value (32% versus 20%) and many were confident to buy craft without seeking expert advice beforehand (45% versus 26%).

Independently-minded, they were happy to buy craft even if people they knew didn't like it (40% versus 24%). And whilst they liked to buy craft that reminded them of places they had visited or love

(17% versus 12%), they were significantly more likely than the average to buy craft on holiday (19% versus 11%).

Online museum shops stood out

Top online buying channels (have bought craft from)



76% of this group said they would buy craft from online retailers in the future; this was comparable to the market average (69%).

ONLINE MEDIA USE

This group over-indexed in a few online media types, these consisted of: YouTube (75% versus 68%), TripAdvisor (43% versus 32%), Pinterest (31% versus 21%) and LinkedIn (23% versus 16%).

Adventurers were interested in taking part in craft experiences

Versus the buyer market average, Adventurers had higher interest in craft experiences.

13% ▲ Had been on a craft course or workshop more than 12 months ago

17% ▲ Definitely would pay to go on a craft course or workshop in the future

ADVENTURERS' CRAFT-RELATED HOBBIES

This group over-indexed in participation of most hobbies tested, including textiles, painting, photography, pottery, and animation, but were comparable to the average when it came to film/video and wood crafts.

* In the survey 'craft market' was defined as somewhere makers sell their own handmade items



Market buyer group pen portraits

3. Early mainstream group

13% (4.8m) of the buyer market

RISK TAKER bought from living craft maker (most spent £70 to £200)

Demographic profile



Significantly
▲ higher/lower
▼ vs market avg

Target Explorer Expression, Stimulation and Essence

Whilst the largest Culture Segment for the Early mainstream group of buyers was Perspective, we would recommend focusing on Expression, who are typically the segment most interested in craft and craft activities. Makers should also target Early mainstream Stimulation and Essence, as both segments are significantly over-indexed in this group versus the buyer market average.

Early mainstream top craft disciplines (had bought in the past two years, would buy in the future)

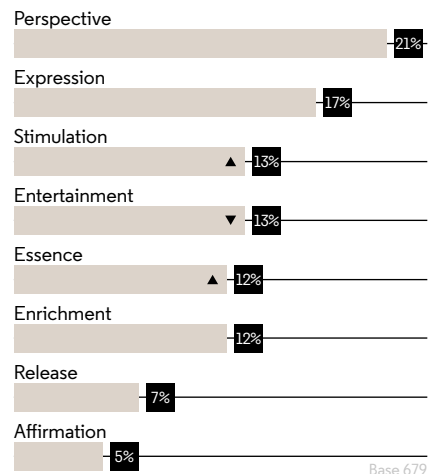
Jewellery— 43% had purchased jewellery in the past two years, significantly higher than the buyer market average of 36%.

91% of Early mainstream would buy jewellery in the future, also significantly higher than the buyer average of 86%.

Woodwork— 31% had bought woodwork in the past two years, comparable to the average. The proportion that would buy this craft type in the future - 92% - was significantly greater than the buyer market average (88%).

Textiles— 27% had bought textiles in the past two years, comparable to the average. The proportion that would buy this craft type in the future - 91% - was significantly greater than the buyer market average (86%).

Culture Segments profile



Base 679

Craft makes a unique gift

Below are Early mainstream’s top motivations for buying handmade craft.



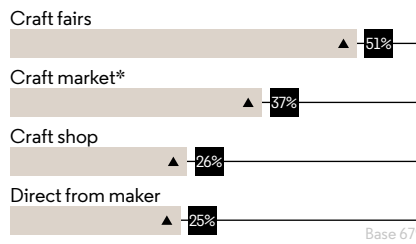
Average craft spend was £24

On average, the Early mainstream group had purchased six pieces of handmade craft in the past two years.

Thinking about their most recent piece of craft, the average spend of this group was £24, and 20% reported that they had known the maker’s name.

Craft fairs were Early mainstream's top pick

Top bricks and mortar buying channels (have bought craft from)



And when asked to select where they most preferred to buy craft from, craft fairs were Early mainstream's first choice, at 23%.

Early mainstreams like to browse and had a relaxed approach to craft buying

Over half of the Early mainstream group (55%) had bought craft online; but of any buying channel, they most preferred to buy craft from brick-and-mortar craft fairs (23%).

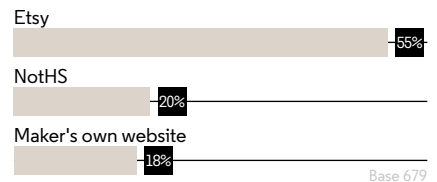
In comparison to the buyer market average, this group were more likely not to know what or whose work they wanted to buy (25% versus 18%), and weren't any more likely to buy craft if they knew about the maker and the ideas behind the work (16% versus 9%). Early mainstream buyers were also more likely to disagree with the idea they would only buy craft they knew was individually made (12% versus the buyer market average of 8%).

Buying locally-sourced work was more important to them than the average buyer (17% versus 13%), but they did not eschew buying mass-produced items for their home (20% versus 17%).

When thinking about buying craft, they typically preferred to browse at a craft fair or exhibition (47% versus 41%) and a significant proportion said were not very likely to seek expert or professional advice before making a purchase (41%, versus the buyer market average of 26%).

Online museum shops stood out

Top online buying channels (have bought craft from)



76% of this group said they would buy craft from online retailers in the future; this was comparable to the market average (69%).

ONLINE MEDIA USE

Early mainstream were most likely to use Instagram (41%), Twitter (39%) and Pinterest (26%).

They did not over-index in use of any print sources.

Early mainstreams wanted craft experiences

Versus the buyer market average, Early mainstream buyers had higher interest in craft experiences.

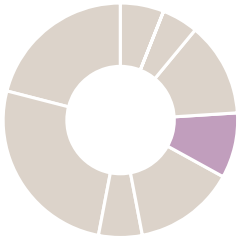
8% ▲ Had been on a craft course or workshop in the past 12 months

10% ▲ Definitely would pay to go on a craft course or workshop in the future

EARLY MAINSTREAM'S CRAFT-RELATED HOBBIES

We asked buyers about their craft-related hobbies. Early mainstream buyers over-indexed in textile crafts (27%), painting and print making (23%); and photography (22%).

* In the survey 'craft market' was defined as somewhere makers sell their own handmade items



Market buyer group pen portraits

4. Mature mainstream group

9% (3.5m) of the buyer market

Would buy from a living maker or has bought from a living maker, but not a risk taker, spent on average <£50

Demographic profile



Target Expression and Enrichment

Whilst the largest Culture Segment for the Mature mainstream group of buyers was Perspective, we would recommend focusing on Expression, who are typically the segment most interested in craft and craft activities. Makers should also target Enrichment, as this segment is significantly over-indexed in the Mature mainstream group versus the buyer market average.

Top craft disciplines (had bought over two years ago*, and would buy in the future)

Ceramics— 42% had purchased ceramics over two years ago, significantly higher than the buyer market average of 36%.

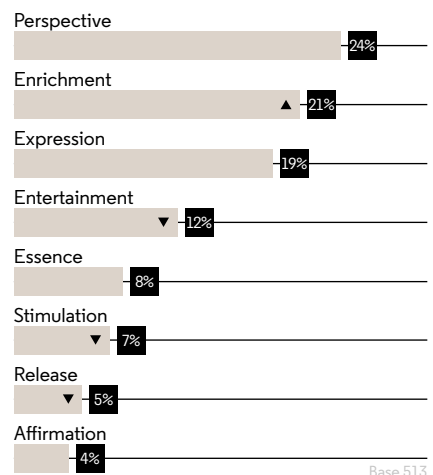
90% of this group would buy jewellery in the future, comparable to the buyer average, also at 90%.

Woodwork— 42% had bought woodwork over two years ago, significantly higher than the buyer market average of 42%.

88% of this group would buy woodwork in the future, comparable to the buyer average, also at 88%.

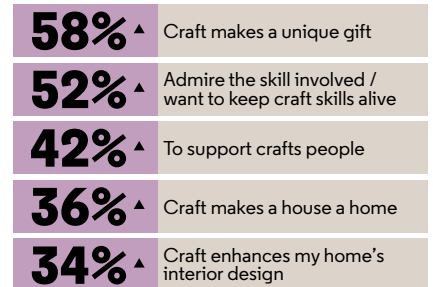
Jewellery— 37% had bought jewellery over two years ago, significantly higher than the buyer market average of 32%.

Culture Segments profile



Craft makes a unique gift

Below are the motivations for buying craft that this group over-indexed in.



Average craft spend was £120

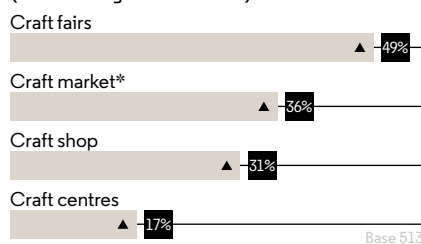
On average, the Mature mainstream group had bought five pieces of handmade craft in the past two years.

Thinking about their most recent piece of craft, their average spend was £120; 19% said that they had known the maker's name.

* This group's profile meant all craft purchases by discipline made within the past two years were comparable to the average

Craft fairs were their top pick

Top bricks and mortar buying channels (have bought craft from)



And when asked to select where they most preferred to buy craft from, craft fairs were Mature mainstream's first choice, at 25%.

They liked to browse and had a relaxed approach to craft buying

In total, 21% of the the Mature mainstream group had bought craft online, a much lower proportion versus the average buyer (32%). Those who had were most likely to have bought from Etsy (37%), but again this was much lower than the average (51%).

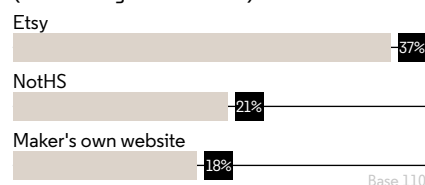
When it came to bricks-and-mortar buying channels, craft fairs came top (49%), and fairs were also their most preferred buying channel (25%).

The Mature mainstream group's attitudes to craft mirrored the market average in many instances, but in some cases they were significantly more likely to have a neutral stance. Neither disagreeing nor agreeing, for example, with the statement that they would seek professional advice before a purchase (34% versus 28%), that they'd buy because they expected a piece to go up in value (41% versus 33%) or only buy from a maker with an established reputation (42% versus 33%).

However, versus the average buyer the Mature mainstream group were more adamant there was a difference between the original and a copy (27% versus 22%), and felt they were more likely to buy if they knew about the maker and/or the ideas behind a piece of craft (41% versus 35%).

Over a third had bought from Etsy

Top online buying channels (have bought craft from)



56% said they would buy craft from online retailers in the future; this was significantly lower than the buyer market average (69%).

MEDIA USE

This group were most likely to use TripAdvisor (40%). They were most likely to read the Daily Mail (36%), regional papers (12%) and the Daily Telegraph (11%).

Low interest in craft experiences

Versus the buyer market average, this group had lower interest in future craft experiences.

5% ▲ Had been on a craft course or workshop in the past 12 months

4% ▼ Definitely would pay to go on a craft course or workshop in the future

CRAFT-RELATED HOBBIES

We asked buyers about their craft-related hobbies. The Mature mainstream group under-indexed for all hobbies. Their most frequently selected hobby was textile crafts (24%).



Market buyer group pen portraits

5. Millennial mainstream group

14% (5.4m) of the buyer market

Would buy from a living maker or has bought from a living maker, but not a risk taker, aged 30 to 49

Demographic profile



Target Expression and Stimulation

We would recommend focusing on Expression, who are typically the segment most interested in craft and craft activities, and who are significantly over-indexed in this group of buyers. Makers should also target Millennial mainstream group Stimulation, as this segment is also significantly over-indexed here, versus the buyer market average.

The Millennial mainstream group were interested in all craft types

It's not possible to pinpoint artforms the Millennial mainstream group were especially interested in, because they were very interested in everything.

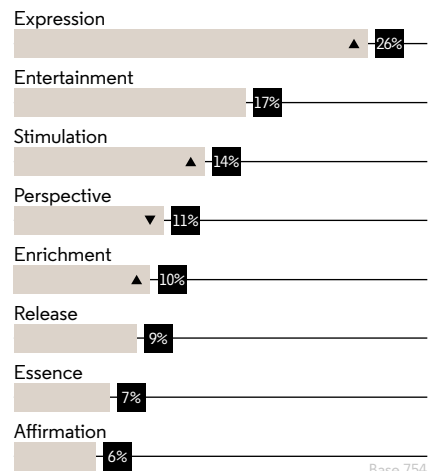
Versus the average buyer, this group was more likely to have purchased craft pieces in every artform in the past two years, including: ceramics (37% versus 24%), jewellery (45% versus 36%), textiles (35% versus 24%), and metalwork (13% versus 10%).

They were also more interested than the average buyer in purchasing all of these types of crafts in the future.

With Expression accounting for the largest proportion of this group, this is unsurprising. Typically, Expression will make purchases based on what resonates with them and what they form an emotional connection with.

The object's story is just as important as the artform, and as Expression loves arts and crafts, and enjoys broadening their horizons, it's unsurprising the Millennial mainstream group have broad and varied tastes.

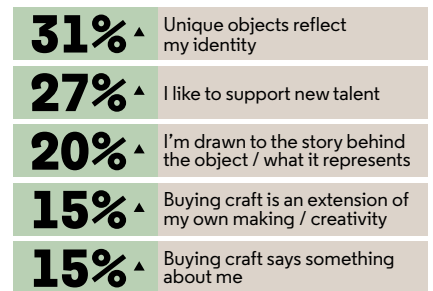
Culture Segments profile



Base 754

Craft makes a unique gift

Here are the motivations the Millennial mainstream group over-indexed in when buying craft.



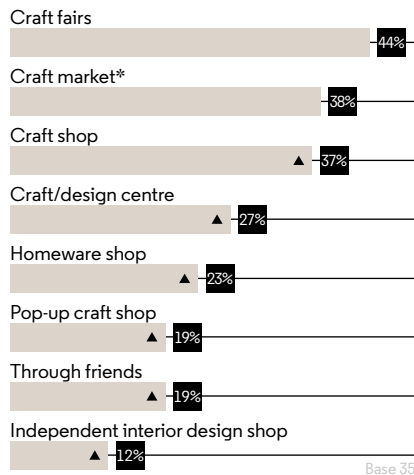
Average craft item spend was £149

On average, the Millennial mainstream group had bought seven pieces of handmade craft in the past two years.

Thinking about their most recent piece of craft, their average spend was £149; 15% said that they had known the maker's name.

Prolific use of face-to-face channels

Top bricks and mortar buying channels (have bought craft from)



When asked to select where they preferred to buy craft from Millennials (versus the average buyer) were significantly more likely to pick Etsy (15% versus 8%), Not on the High Street (5% versus 3%), and the individual maker's website (4% versus 2%).

Confident Millennial group buy craft when they know about its maker

The Millennial mainstream buyers felt they were more likely to buy a craft piece if they knew about the maker and ideas behind the work, versus the average buyer (12% versus 8%).

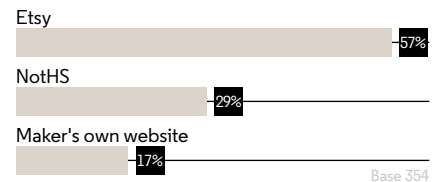
They also tended to be surer about what or whose work they wanted to buy, and to actively look for it (8% definitely agreed, compared to 5% of average buyers).

Versus the average buyer, it was definitely important to Millennials that craft pieces were locally-produced (16% versus 13%), whilst they tended to agree that they sought sustainably-produced objects (41% versus 34%).

Versus the average buyer (9%), and also the other groups profiled in this report, a significantly higher proportion of Mainstream millennials tended to disagree that they would buy something even if people they knew did not like it.

Over a third had bought from Etsy

Top online buying channels (have bought craft from)



79% of this group said they would buy craft from online retailers in the future; this was higher than the buyer market average (69%).

ONLINE MEDIA USE

This group over-indexed in almost all online media types. This included Facebook (78% versus 71%), YouTube (78% versus 68%), WhatsApp (69% versus 58%), Instagram (50% versus 36%) and Twitter (44% versus 34%).

Millennials keen on craft experiences

Versus the buyer market average, Millennials had higher interest in craft experiences.

20% ▲ Had been on a craft course or workshop more than 12 months ago

9% ▲ Definitely would pay to go on a craft course or workshop in the future

MILLENNIALS' CRAFT-RELATED HOBBIES

We asked buyers about their craft-related hobbies. This group over-indexed in participation of all hobbies tested, including painting, photography, textiles, animation and woodworking.



Market buyer group pen portraits

6. Gen Z mainstream group

6% (2.2m) of the buyer market

Would buy from a living maker or has bought from a living maker, but not a risk taker, under 30

Demographic profile



Target Expression, Stimulation and Affirmation

We would recommend focusing on Expression, who are typically the segment most interested in craft and craft activities, and who are significantly over-indexed in the Gen Z group of buyers. Makers should also target Stimulation and Affirmation, as both segments are significantly over-indexed in this group versus the buyer market average.

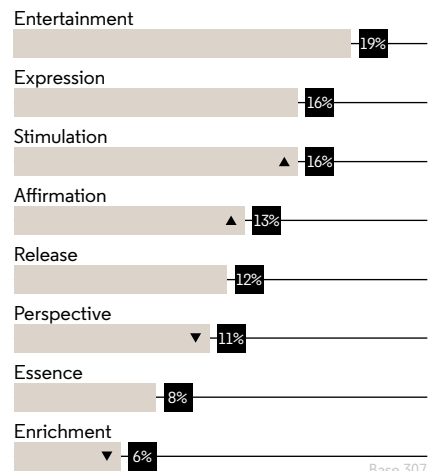
Gen Z: had bought more craft in the past two years than average, but future buying interest was average

In the past two years, Generation Z mainstream buyers had bought every artform tested in the survey at a significantly higher rate than the average buyer. This included ceramics (56% versus 31%), glasswork (40% versus 24%), woodwork (51% versus 29%), jewellery (52% versus 36%), textiles (42% versus 24%) and metalwork (21% versus 10%).

This recent purchasing behaviour was comparable to the Millennial mainstream group, who also over-indexed on recent purchases of all artforms, versus the average buyer. However, Gen Z mainstream buyers differed in that they had a shorter purchasing history. For all artforms, they were significantly less likely to select they had bought a piece over two years ago, versus the average buyer.

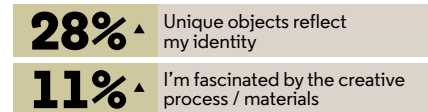
Their interest in buying craft in the future was also comparable to the average buyer – for all artforms. This might suggest Gen Z are open to buying a range of artforms, but have not (yet) developed a taste or preference for any specific type of craft.

Culture Segments profile



Fascinated by the creative process

The Gen Z mainstream group of buyers only over-indexed, versus the average buyer, in two drivers for purchasing craft. All other motives were comparable to the average.



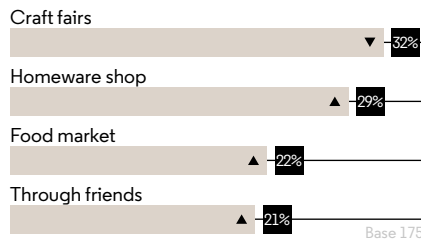
Average craft item spend was £104

On average, the Gen Z mainstream group had bought eight pieces of handmade craft in the past two years.

Thinking about their most recent piece of craft, their average spend was £104; 16% said that they had known the maker's name.

Bought craft from homeware shops

Top bricks and mortar buying channels (have bought craft from)



Versus the average buyer, Gen Z buyers most preferred to buy craft from Etsy (22%), homeware shops e.g. IKEA (12%), through friends (12%) and Not on the High Street (6%).

Gen Z like to browse and had a relaxed approach to craft buying

Over half of the Gen Z mainstream group (57%) had bought craft online. And they most preferred to buy craft from Etsy (22%).

Their used and preferred craft buying channels were less conventional than those opted for by the other groups profiled.

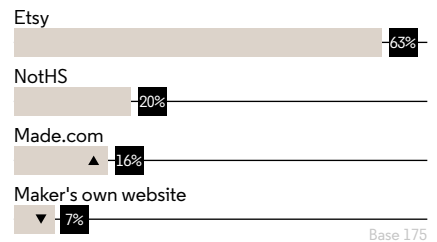
Memory-making was important to this cohort, with 17% buying craft that reminded them of places they had visited or loved (significantly higher than the average, 12%). They were also most likely to agree they sought out sustainably-produced items (18% versus 11%), but did not necessarily feel these had to be locally-produced (7% vs 3%).

Overall, this group felt less strongly about many statements, being significantly more likely to select 'tend to disagree' rather than 'definitely disagree' versus the other buying groups. For example, 14% tended to disagree that they'd buy something even if they knew others didn't like it (14% – significantly higher compared to the buyer average, 9%).

The Gen Z group was also most likely to disagree they'd only buy craft that was individually made (12% versus 8%) and although albeit a small proportion, were most likely to agree that apart from price, there's no difference between copies and originals (6% versus 3%).

Made.com was significant source

Top online buying channels (have bought craft from)



80% of Gen Z buyers said they would buy craft from online retailers in the future; this was higher than the market average (69%).

ONLINE MEDIA USE

This group over-indexed in almost all online media types. This included YouTube (84% versus 68%), WhatsApp (71% versus 58%), Instagram (67% versus 36%), Snapchat (49% versus 18%) and Spotify (46% versus 24%).

Future workshop interest on a par

Versus the average buyer, Gen Z buyers were significantly more likely to have had a craft experience +12 months ago. They were just as likely to 'definitely' be interested in the future as the average buyer, but much more likely to say they 'probably' would (20% versus 13%).

25% ▲ Had been on a craft course or workshop more than 12 months ago

10% Definitely would pay to go on a craft course or workshop in the future

GEN Z'S CRAFT-RELATED HOBBIES

This group over-indexed in participation of all hobbies tested, including painting, photography, animation, and woodworking – with the exception of textiles, for which their participation was comparable to the average.

The buying channels preferred by the Generation Z mainstream buyers – including homeware stores and through friends – and their need for sustainably-made items (but not necessarily original or individually made craft items) suggests there's been a shift in understanding of what the term 'craft' means amongst younger buyers versus the Millennial and Mature mainstream buying groups.



Market buyer group pen portraits

7. New entrant group

26% (10m) of the buyer market

Would buy from a living maker or has bought from a living maker, but not a risk taker, under 30

Demographic profile



Target Expression

Despite under-indexing in Expression, would recommend focusing on Expression, who are typically the segment most interested in craft and craft activities, and who are significantly over-indexed in this group of buyers.

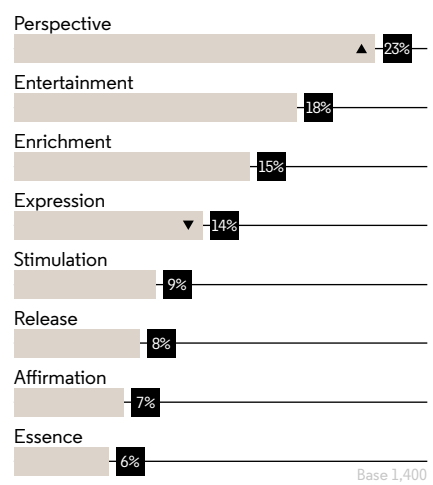
New entrants had bought little craft, versus the market average

The New entrant group of buyers, not unexpectedly, did not over-index in recent craft-buying (bought in the past two years) for any artform. Instead, they were either comparable to the average buyer, or under-indexed against it.

In a few instances, new entrants had been significantly more likely to have purchased an artform over two years ago, versus the average buyer. This was true for ceramics (43% had bought over two years ago, versus 36% buyer average), woodwork (38% versus 34%), and jewellery (37% versus 32%).

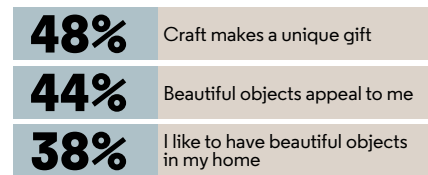
However, New entrants were also significantly more likely to have selected 'no never' when asked if they had bought each of these artforms, versus the buyer market average. And they were significantly more likely, versus the average buyer, to say they would not consider buying each artform, in the future.

Culture Segments profile



Craft makes a unique gift

Here are the most frequently selected craft-buying motivations for New entrants. They did not over-index on any motivation.



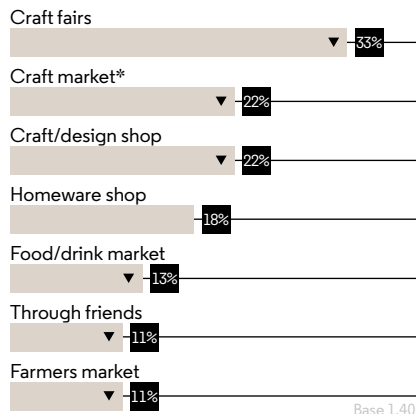
Average craft item spend was £117

On average, the New entrant group had bought four pieces of handmade craft in the past two years. The average buyer had bought seven pieces in this timeframe.

Thinking about their most recent piece of craft, their average spend was £117; 9% said that they had known the maker's name significantly lower than the average buyer (15%).

Lower than average for all channels

Top bricks and mortar buying channels (have bought craft from)



When we asked New entrants where they preferred to buy craft from, they under-indexed versus the average buyer for all online and face-to-face channels tested. They were more likely to say, in comparison to the average buyer, that they had no preference (41% versus 31%).

New entrants did not have strong views on craft making

New entrants' attitudes to craft were, in many instances, close to the buyer market average. However, there were some significant differences.

In comparison to the average buyer, new entrants were significantly more likely to neither agree nor disagree with the idea that they looked for sustainably-produced (44% versus 38%) and locally-produced craft objects (38% versus 34%).

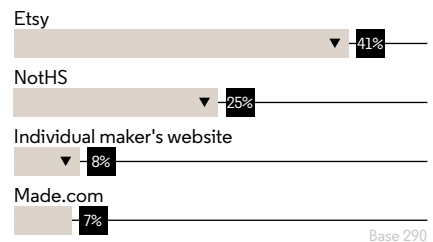
New entrants were most likely to feel neutral about seeking professional advice before making a craft purchase (32% versus 28% average buyers), and tended to disagree that they would buy work with the expectation that it would go up in value (31% versus 28%). Many in this group also did not feel particularly strongly that design and the work of designers/makers was very important to them (42% versus 38%).

* In the survey 'craft market' was defined as somewhere makers sell their own handmade items

As new entrants into the craft market, these findings are not a cause for surprise. This cohort's interest in, and attitudes towards, craft are fairly casual, overall.

New entrants bought from Etsy

Top online buying channels (have bought craft from)



62% of this group said they would buy craft from online retailers in the future; this was significantly lower than the market average (69%).

ONLINE MEDIA USE

This group was comparable to the average, or under-indexed for every type of online media tested. 71% used Facebook (versus 71% average) 68% used YouTube (versus 68% average), and 54% used WhatsApp (lower versus the 58% market average).

New entrants had little interest in craft experiences

Versus the buyer market average, New entrants had little interest in craft experiences.

2% Had been on a craft course or workshop more than 12 months ago

4% Definitely would pay to go on a craft course or workshop in the future

NEW ENTRANTS CRAFT-RELATED HOBBIES

Perhaps unsurprisingly, new entrants under-indexed on every craft-related activity tested, versus the average buyer. Instead, they were most likely to have selected 'none of these' (55% versus 50% buyer market average).

3

Introduction

Aims of this research

The key aims for this research are to provide quantitative and qualitative evidence of the volume, value and characteristics of the UK craft market and an analysis of its potential, which will:

- ① Enable the Crafts Council and Steering Group partners to present robust evidence and data about the size and nature of the craft market to advocate to Government, funders and wider partners.
- ② Inform the Crafts Council and partners in their work to support the market and the professional development of craft businesses.
- ③ Support craft businesses in planning for creative and business development.

The study addresses the following research questions:

1. What is the size, value and growth potential of the UK craft market?
2. What are the characteristics of the UK craft market?
3. How are these characteristics likely to change in the near future?
4. How can the Crafts Council and partners develop policy and practical support for craft businesses?

This report also addresses questions on the size, potential and characteristics of the market for craft in two major US cities – New York and Los Angeles (see Chapter 10). The Crafts Council secured additional funding (following the commissioning of the UK report) for MHM to undertake a small-scale study of this example of the craft export market.

This study is the third in a series of research projects which analyse the state of the craft market, looking

at how it has evolved and how infrastructure and needs have changed since the two previous studies, also conducted by Morris Hargreaves McIntyre. The first in the series *Making it to Market* (Morris Hargreaves McIntyre for Arts Council England) was conducted in 2006, with the second study, *Consuming Craft* (Morris Hargreaves McIntyre for Crafts Council) undertaken four years later in 2010.

This study in 2020 was conducted across the four UK nations, whereas the two previous studies were England only. Historical comparisons in the report therefore relate to England. However, with some exceptions that are highlighted, findings in 2020 can be generalised across the UK and it's therefore reasonable to infer that growth trends are common across the UK (also taking relative populations into account).

Time period of the research

This study was commissioned in August 2019. Primary research for the UK population study took place in October and November 2019. The primary research with makers (survey and follow-up qualitative research) was conducted in January and February 2020, with in-depth interviews with intermediaries also conducted during February 2020. All primary research for this study was completed prior to the UK outbreak of Covid-19.

Research methodology

In order to meet these objectives, Morris Hargreaves McIntyre undertook primary and secondary research with current and potential buyers of craft, makers and intermediaries.

Consumer trends desk research

We identified major consumer trends from current literature, relevant to the craft market and developed attitudinal and behavioural statements based on the identified trends to include in the surveys for consumers and makers, and in the depth interview scripts for intermediaries.

UK population survey

A nationally representative UK-wide online population survey was undertaken in October and November 2019. Respondents for the population survey were sourced from third-party panel providers Panelbase.

The 15-minute survey was conducted with a sample of n=6,068 adults age 16 or over in England, Wales, Scotland and Northern Ireland. This study is the first time that research into the craft market has covered all four nations in the UK; in 2006 and 2010 the sample was England only.

Interlocking quotas on age, gender, educational attainment (as a proxy for social class) and geographic region ensured that the final weighted sample was representative of the resident population in the UK at a national and regional level, and within each of the four home nations.

Screening questions at the start of the survey were used to identify whether or not respondents were in the market for craft, as current or potential future buyers. Those who were not in the market for buying craft (rejectors) were screened out of the survey. 85% of the population surveyed were in the craft market; this resulted in a final sample (n) of n=5,392 respondents completing the full survey.

Reliability of findings

Only a sample of the total adult population in the UK was interviewed for this study so we cannot be certain that the figures obtained are exactly those we would have found had every adult in the UK been interviewed. However, for any percentage given, we can estimate confidence intervals (margin of error) within which the true values are likely to fall.

At a confidence level of 95%, the confidence interval (margin of error) is +/-1.3 at 50%, i.e. where the survey result is 50%, we can be 95% confident that the actual result falls between 48.7% and 51.3%.

Because the sample is large and nationally representative, we are able to use these results to estimate the size of the market overall (the number of people who have bought or would consider buying craft)

by using population statistics. Using the same approach, we are also able to estimate the volume and value of sales across six major craft disciplines: ceramics; glass; woodwork; jewellery; textiles and metalwork (from ironmongery to fine silversmithing). Because the same approach was used in the 2006 study, we can compare this volume and value of sales on a like-for-like basis.

The survey also provides demographic information about buyers and potential buyers, detailed information on the face-to-face and online sources used to buy craft, their attitudes and motivations for buying craft; participation and interest in craft experiences; media consumption and Culture Segments. The survey was available for respondents in English and Welsh.

Makers survey

In consultation with the Crafts Council and Steering Group, we developed a 10-minute online survey for makers. The survey was distributed electronically via the Crafts Council's and Steering Group members' mailing list with links to the survey also posted on partners' social media channels. To extend the breadth of makers consulted, the survey was also distributed by Etsy UK, Folksy and other partners via newsletters and social media. The survey was conducted in January and February 2020 and responses were returned from a final sample of n=1,707 makers from across the UK.

The maker survey included questions to capture:

- Demographic profile of makers
- Types of craft produced
- Primary and subsidiary markets
- Marketing channels
- Distribution channels and intermediaries
- Value of sales and the income mix e.g. from sales, exports, classes, formal teaching

Following on from the makers survey, a semi-structured qualitative questionnaire was sent out to a sub-sample of makers to explore in greater depth:

- Support needed to develop sustainable business models
- Successes and challenges in selling work internationally
- Successes and challenges in diversifying into craft experiences
- Main drivers for, and barriers to buying handmade craft for consumers
- Specific support needed from the Crafts Council

Responses to the qualitative follow-up were received from a final sample of n=28 makers.

Depth interviews with intermediaries

A cross-section of intermediaries, operating in each of the four home nations, was identified in consultation with the Crafts Council and Steering Group. Intermediaries included organisations shaping new routes to market for makers,

organisations focusing on learning and craft experiences, rural and urban organisations and online craft marketplaces. Nine telephone in-depth interviews were conducted with intermediaries in February 2020.

The Steering Group

A core element of the Crafts Council's Research Strategy 2018–22, this study was steered by a partnership between the Crafts Council and the following contributing partners: Arts Council of Wales, Contemporary Visual Arts Network, Craft Northern Ireland, Craft Scotland, Creative Scotland, Creative United, The Goldsmiths' Company, Great Northern Events/ Great Northern Contemporary Craft Fair.

The Crafts Council was the commissioner on behalf of the partners, with whom they formed a steering group to provide advice, support, and guidance at key points in the study. Steering group members assisted in the distribution of maker surveys through their networks and in the identification of key contacts for the depth interviews with intermediaries.

Analysis with comparator data

Where appropriate this report compares the findings from this research project with comparable data from the 2006 report *Making it to Market* and the 2010 study *Consuming Craft*.

The research methods used in this and the 2010 study however, are different to those used for *Making it to Market*. The key points of difference are that this and the 2010 study employed online survey methods, in contrast to *Making it to*

Market, which employed a telephone survey. Given the influence of online surveying on interviewees' responses it is likely that the change in survey methodology is responsible for some differences in the data. However, given that the results of the 2020 study are in line with the changes in the market which might have been expected, based on external trends, comparisons with the 2006 study remain valid for the purpose of analysis.



Neil Wilkin, Ruthin Craft Centre at Collect (2019) © Gregory Parsons

Definitions of terms

The definition of 'craft' used in this study was broader than the definitions used in the 2006 and 2010 studies.

In this study 'craft' was defined as:

Any object that has been made by hand by a craft maker, including basketry, ceramics, furniture, glass, jewellery, metalwork, paper, textiles, wood. Disciplines can range from furniture to jewellery, encompass stand-alone unique pieces of work and may include the use of more unusual materials.

In the 2006 study 'fine craft' was defined as:

Contemporary craft work that is cutting-edge and ensures the highest standard of workmanship; work that must not seek to reproduce or restore, but rather must be innovative in its use of materials and aesthetic vision; and work that not only reflects the signature of the individual maker, but also demonstrates investigation of processes and critical enquiry.

In 2010, 'contemporary craft' was defined as:

Original handmade craft that was recently made and/or produced by a living craft maker.

In addition, we use the following general terms:

Craft business: a maker business.

Craft Fair: takes place annually or at seasonal times throughout the year and has an entry fee. Individual artists or those representing them can take part.

Craft Market: occurs regularly where predominantly individuals hire a stall; it can be outdoors, often requiring no payment to enter.

Intermediaries: organisations which provide craft makers with routes to market – directly to consumers or via commercial opportunities – and who may offer services including website

development, marketing and branding, professional photography, and training opportunities.

Makers: people who define themselves as designers and makers of craft.

Master Craftsperson: established 5+ years and has shown work at international galleries or art fairs.

Established Professional Maker: established 5+ years, hasn't shown internationally, sell through professional channels or earn their living solely through selling work or through craft related activities.

Early Career Professional Maker: established 1–4 years, sell through professional channels or earn their living solely through selling work or through craft related activities.

Emerging Maker: established less than a year, sell through professional channels or earn their living solely through selling work or craft related activities.

Occasional Maker: maker who supplements other income with some craft activities intended to earn money; hasn't sold through professional channels.

Everyday Maker: participants in leisure time craft activities not intending to earn money through selling.

Market: all buyers and potential buyers.

Current market: buyers who have bought original handmade craft.

Potential market: buyers who have yet to buy original handmade craft but would consider doing so.

Marketplace: the place of exchange between makers, buyers and suppliers.

Sector: all people, businesses and organisations involved professionally in craft.

Demo by Alison
Fitzgerald at Craft Fest
2013 © Simon Mills



4

Craft is now essential to our lives

How recent trends are shaping consumer behaviour

This chapter identifies trends driving the UK craft sector in 2020. It looks back at the trends that shaped the last decade and considers their implications for the UK craft sector going forward. It also identifies emerging trends and issues which are likely to shape the UK craft sector in the next ten years.

Craft is no longer a peripheral or isolated area of specialist interest: it is now firmly established in the mainstream. Social trends, that were discerned as impacting on the crafts sector in 2010, continue to wield their influence on public values and behaviour. When combined with the impacts of e-commerce these factors have had a clear effect on the market for craft both in terms of buyers and makers.

Several trends identified in *Consuming Craft*¹ – the Crafts Council-commissioned market study of England’s craft market in 2010 – remain pertinent to the UK craft sector in 2020.

Craft in the UK has never been more visible

To start, various craft disciplines have been repeatedly profiled by the media as a means to achieve or facilitate self-care, mindfulness and digital detoxing; and have been championed as a means for consumers to make sustainable purchases and minimise their environmental footprint.

The proliferation of face-to-face craft selling channels – particularly craft fairs and markets – will also have affected the profile of craft in the UK.

Just as platforms like *Etsy* and *Folksy* have brought craft to a new online audience, so too has the rise in craft fairs and markets brought craft to more people face-to-face; with enterprises such as *Crafty Fox* (London)² and *Great Northern Contemporary Craft Fair* (Sheffield)³ not in existence a decade ago. This evidence is compelling, but somewhat anecdotal – further research to quantify the growth in craft fairs and markets would be beneficial.

1 www.craftscouncil.org.uk/content/files/consuming_craft_full_report.pdf

2 www.craftyfoxmarket.co.uk

3 www.greatnorthernevents.co.uk/homepage-gnccf/2019-exhibitors/gnccf-sheffield.aspx

Digital exposure has pushed craft into the mainstream

Craft has also become a mainstay of entertainment television, pushing it firmly into the general public’s radar. As evidence, look no further than

the viewing figures for craft-based programmes like *The Great British Sewing Bee* and *The Great Pottery Throw Down*.

Table 1

UK craft show viewing figures

Origin	Viewers
<i>The Great British Sewing Bee</i> (BBC2) ⁴	
Series 1 — 2013	2.98m
Series 5 — 2019	3.79m
<i>The Great Pottery Throw Down</i> (Series 1, 2 – BBC; Series 3 – Channel 4) ⁵	
Series 1 — 2015	2.36m
Series 2 — 2017	2.65m

And the appetite for this type of television does not appear be waning. For example, Netflix (6.6m UK subscribers) recently aired a new competitive glassblowing craft series *Blown Away*;⁶ series three of *The Great Pottery Throw Down* launched on Channel 4 in January 2020; and at the end of 2019, Channel 5 launched *The Wonderful World of Making*. Whilst craft’s

presence on mainstream TV isn’t new, the sustained reach of these programmes (see Table 1) across multiple series and spanning multiple years substantiates the view that craft has never been more visible.

Alongside the increased visibility of craft in the entertainment sector over the past few years, changes in the wider economy are reflected in craft, as the following sections make clear.

4 www.barb.co.uk/viewing-data/weekly-top-30/

5 www.barb.co.uk/viewing-data/weekly-top-30/

6 www.businessofapps.com/data/netflix-statistics/

2020 Brexit deal negotiations

The UK government and the EU may have pressed pause on Brexit negotiations whilst navigating the Covid-19 outbreak,⁷ but at the time the makers' survey was conducted, Brexit was a pressing issue for many craft makers. Makers in all four nations (England, Scotland, Wales and Northern Ireland) reported similar levels of impact.

Just over one quarter (26%) of all craft makers surveyed for this research said that Brexit had already had an adverse impact on their business; a further 22% said it had not currently impacted their business, but they expected it to in the future. The majority of issues makers faced related to rising costs – of materials, of shipping – and a loss of commissions, particularly from international and private clients.

Cost of fuel and steel has gone up noticeably in the last three years. More importantly private clients have become more restrained in their spending and the volume of enquiries for commissioned work has decreased by around 50% over the last three years.

Metalworker

In 2016, I made 76 sales to non-UK European countries in the EU. 2017, 64 sales. 2018, 20 sales. 2019, 3 sales. I expect it will also impact my US clientele and clients in other countries as import and shipping fees are likely to rise.

Jewellery-maker



Craft Scotland Summer Show (2017)
© Susan Castillo

7 www.theguardian.com/politics/2020/mar/30/extend-brexit-transition-by-years-over-coronavirus-uk-told

Digital platforms and the rise of e-commerce

The craft sector has also been strongly impacted by the rise of digital selling platforms in the early to mid 2000s – both craft-specific platforms, such as *Folksy* (founded in 2008), and platforms with a broader product remit, including *Etsy* (founded in 2005) and *Not on the High Street* (founded in 2006).

These types of platforms are themselves borne out of some of the earliest online selling platforms such as *Amazon* (founded in 1994) and *eBay* (founded in 1995). And whilst UK consumers still spend the majority of their money in bricks-and-mortar shops, between 2008 and 2018 online spending increased by 13 percentage points (or threefold) from 4.9% to 17.9%. The proportion of internet users shopping online in 2008 was 49%; in 2018, it had reached 87%.⁸

The existence of online selling platforms has contributed to two main changes in the UK craft sector.

The first is the rise of everyday makers. The USP of platforms, such as *Etsy*, is that the basic framework to sell products is provided for the maker – all they have to do is populate it. This has facilitated the proliferation of craft micro-businesses and Occasional Makers; who might otherwise not have had the resources, funds or know-how to set up a craft business. The global reach of platforms like *Etsy* – which in December 2019 reported a global total of 2.7m active sellers with 66m items for sale, perused by 46.4m active buyers⁹ – is testament to

the rise of e-commerce and global interest in craft and vintage items. Online platforms have supported the ability of individuals to build portfolio careers (see section *Craft making as part of a portfolio career*).

The second is that mainstream online platforms, such as *Amazon*, have influenced consumer expectations of retail experiences. This includes the consumer need for immediacy (with next day or quicker delivery), consumer control (informed as to a transaction's progress; the ability to track their item), seamless spending (payments via contactless and wearables) and the concept that 'ease is the new loyalty'. In other words, consumer loyalty is built on the back of intuitive online shopping experiences that prioritise consumer convenience.¹⁰

Feedback from the depth interviews with intermediaries and the responses from the mini-qualitative makers' survey (please refer to the Introduction chapter for more details) indicate that this is something makers who sell online – and independent intermediaries who enable makers' online sales – may be struggling to compete with.

As craft becomes more visible, and as the rise of everyday makers selling lower-cost items perhaps challenges or blurs the lines as to what craft has conventionally been understood to mean, makers may find themselves competing more and more frequently with these mainstream markets and the retail expectations they create.

8 www.ons.gov.uk/businessindustryandtrade/retailindustry/articles/howourinternetactivityhasinfluencedthewayweshop/october2019

9 www.etsy.com/uk/press

10 www.imrg.org/blog/the-changing-online-shopping-habits-and-how-to-understand-them/

Another change – although one much more difficult to quantify – is the role online platforms have had in developing the relationships between consumers, makers and the stories behind the objects they create. The immediacy and accessibility now afforded to consumers in the 21st Century is unprecedented. Social media, in particular, allows consumers

to access stories and narratives about craft objects, the ideas behind them, and even the makers themselves, simply at the touch of a finger. For the UK craft sector, this has (and will continue to) facilitate opportunities to share stories, build inclusive relationships, and invite collaborations between makers themselves, but also between makers and consumers.¹¹

Craft making as part of a portfolio career

The rapid growth in self-employment has been a pronounced feature of the UK labour market in recent years. The number of self-employed individuals increased from 3.3 million people (12.0% of the labour force) in 2001 to 4.8 million (15.1% of the labour force) in 2017.¹² Alongside this, the ‘gig economy’ has also fuelled growth in online services and sales.

From the research conducted for this 2020 study, we know that a third (35%) of the makers surveyed earn a living solely through their work. 22% supplement their income by teaching craft workshops or courses, and a further 18% do so with other freelance work connected to craft. Over one fifth of all makers (21%) supplement their income via non-craft related employment.

The ability of craft makers to participate in this type of economy, and to build portfolio careers, has been heavily facilitated by the existence of online platforms for selling and advertising craft. As above, the creation of these platforms has facilitated access for a whole cohort of makers – be they Everyday Makers, micro-businesses, or well-established studios – to new markets and audiences that they may not otherwise have had access to.

¹¹ Murray (2018) *Telling stories through craft*, World Crafts Council

¹² ONS

Craft offers opportunities for experiences

The experience economy – based on consumer demand for experiences over objects – is still going strong. This is something which looks set to continue into the 2020s, as more consumers (particularly Millennials) prioritise services and goods that offer opportunities for self-development and memory-making, with the demand for live, hands-on experiences particularly strong.¹³

The UK craft sector is able to offer meaningful products and experiences, and with the rise of online selling platforms in the last decade, can do so to a wider audience than ever.

Tapping into the need for immersive, authentic experiences that promote self-development is the craft experience market, which, supported by the growth in craft's online presence, did not appear to exist on the same scale when the 2010 study was conducted.

The craft experience market offers everything from soap-making to stone-carving, and experiences can be done face-to-face or online. Feedback from depth interviews with craft intermediaries conducted for this 2020 study indicate that the craft experience sector has become a significant revenue stream for many makers. Exactly which groups of makers is explored later in this report.

Authentiseeking drives a market for craft and craft experiences

Another trend reported in *Consuming Craft* was authentiseeking, also referred to as 'authentic-seeking' which can be defined as consumers' 'desire for new experiences [or products, or services] which are truly

authentic and meaningful.¹⁴ This fuels an appetite for handmade items that draw on context and locality for inspiration as well as the opportunity to have craft experiences rather than to buy craft objects.

Demo by Scott Benefield at
Craft Fest 2013 © Simon Mills



13 Eventbrite (2017) *The Experience Movement: How Millennials are bridging cultural and political divides offline*

14 www.hospitalitynet.org/opinion/4037066.html

A number of social trends identified in 2010 continue to impact the craft sector in 2020.

Craft as a route to ethical consumption and sustainable living

Consuming Craft identified ethical consumerism as a trend to watch; and rightly so. The global call to action on climate change in the past decade – and the strong response to it – has firmly cemented the need for ethical consumption in consumers’ consciousness. This has led YouGov, amongst others, to describe ethical living as a ‘megatrend’ – a trend with a profound ability to affect consumer behaviour that’s here to stay for the longer term.¹⁵

Environmental sustainability is a key element of ethical consumerism, and brands and organisations that demonstrate commitment to reducing environmental impact have been particularly valued. Beyond environmental sustainability, consumers’ preference for purpose-driven brands appears to have also been prompted by growing social movements related to the need for sustainable-supply chains, working rights and fair-trade.

Craft as a tool for health and wellbeing

Several trends focused on health and wellbeing have emerged in the past few years, including:

- Wellness culture – in an increasingly fast-paced and switched-on world, wellness culture has emerged as individuals seek to take time out for self-care and self-development, to aid their mental and physical wellbeing.
- Mindfulness – of greatest interest to millennials, mindfulness is typically explored via meditation and simple creative activities such as origami or drawing, as part of a self-care routine aimed at taking time out from a busy schedule to unwind and relax.
- Digital detoxing¹⁶ – in which consumers (again, particularly

Millennials) deliberately switch-off from their electronic devices to facilitate relaxation and mindfulness and to deliberately reject the modern propensity to be constantly connected to the wider world.¹⁷

The Crafts Council and partners are no strangers to the concept that participating in craft can benefit a person’s health and wellbeing (Smith 2019: *Four reasons craft is good for your mental health*; Yair 2011: *Craft and Wellbeing*) and a multitude of crafts, arts, and charitable and media organisations all seem to agree.¹⁸ For instance, many have recently profiled craft hobbies to help support good mental health during the Covid-19 lockdown.¹⁹

15 <https://yougov.co.uk/topics/resources/articles-reports/2019/11/12/focusing-megatrends-ethical-living-can-help-market>

16 www.theguardian.com/technology/2018/jan/13/how-to-quit-your-tech-phone-digital-detox

17 Syvertsen *Digital Detox: the politics of disconnecting* (2020: 73)

18 <https://youngminds.org.uk/blog/looking-after-your-mental-health-while-self-isolating/>

19 www.huffingtonpost.ca/entry/crafts-bored-in-quarantine_ca_5e78fa23c5b6f5b7c548f2f9; www.independent.co.uk/life-style/health-and-families/coronavirus-mental-health-self-isolate-how-to-manage-quarantine-a9404431.html; www.telegraph.co.uk/art/artists/learn-make-art-self-isolation-help-top-artists/; www.theguardian.com/commentisfree/2020/mar/24/self-isolating-kids-tv

2020 Covid-19 outbreak

At the time of writing (April 2020) the Covid-19 outbreak and subsequent UK government mandate to social distance and stay at home was in full swing. All non-essential institutions have been closed until further notice.²⁰

What impact the need to stay at home will have on consumer interest in craft making (and on what artforms) needs further research. Anecdotally, interest appears to have risen, but the upswing seems to lie primarily with consumers wanting to have a go at making, including families seeking free craft resources to occupy their children, not in consumers seeking to purchase new handmade craft pieces.

The outbreak has adversely affected UK craft businesses, regardless of artform or income band. A Covid-19 impact survey conducted by the Crafts Council with 600 of their makers in March 2020 found 63% were currently unable to make craft due to studio closures, material shortages and family commitments, owing, for example, to school closures.

The study revealed that the closure of galleries had had the biggest business impact for 71% of makers, followed by the closure of markets and fairs, at 64%. And 60% had experienced cancellation of teaching, classes and workshops.²¹

Makers who sell primarily online have also reported logistical challenges with shipping and delivery, and anecdotally, some have experienced a fall in sales.²² The economic impact of Covid-19 is particularly likely to be felt by those makers who do not have the means or ability to diversify their revenue streams.

Craft Scotland at Collect (2018)
© Sophie Mutevelian



20 www.gov.uk/coronavirus?gclid=EAlalQobChMI44jjkMfq6AIVU-3tCh1RHwW0EAAYASAAEgLZn_D_BwE

21 www.craftscouncil.org.uk/articles/crafts-council-survey-of-impact-of-covid19-on-makers

22 <https://talk.folksy.com/t/coronavirus-covid-19-advice/19691/17>

Yusuke Yamamoto, Ruthin Craft Centre
at Collect (2019) © Gregory Parsons



#ArtistSupportPledge is an artist-led movement and network to support artists struggling during Covid-19 using the social media platform Instagram. The Artist Support Pledge asks artists to post images using #artistsupportpledge giving details of their works and price, to a maximum of £200. Every time an artist reaches £1,000 of sales, they pledge to buy £200 of work from other artist(s).²³ This spirit of mutual support and generosity is enabling some artists to maintain a vital income stream at a time when most sales channels have disappeared overnight.

With the outbreak and measures to mitigate it still unfolding, Covid-19's full impact on consumer spending cannot yet be documented. It's already clear, however, that income spend on household essentials has rocketed. In March 2020 UK consumers collectively spent an additional £1.9bn on groceries versus the same period in February 2020. On average, this was an additional £63 per UK household.²⁴

The growth in spending on essentials has led some UK makers to predict consumers will tighten their belts when it comes to 'non-essential' purchases.²⁵ In the Crafts Council's impact survey, 60% of makers expected a loss of income of over £5,000 in the next six months.²⁶

23 www.instagram.com/artistsupportpledge/

24 www.ft.com/content/cf153651-09f3-4cf5-a012-e4f823b648be

25 <https://talk.folksy.com/t/coronavirus-covid-19-advice/19691/17>

26 www.craftscouncil.org.uk/articles/crafts-council-survey-of-impact-of-covid19-on-makers

5

The size and shape of the market in 2020

This chapter looks at the data gathered in the UK population survey. Data from survey respondents' reported buying behaviour has been used to estimate the volume and value of the craft market in 2020. This market data is compared to like-for-like volume and value estimates from the 2006 study. Changes in the volume and value of craft sales have been analysed in the context of the external factors which have been influencing changes in the sector since 2006.

The analysis also identifies the cohorts within the population who have entered the market in the period between the studies, and are responsible for driving the changes observed in the volume and value of craft sales.

There has been a dramatic growth in the number of people buying craft and a corresponding increase in the total value of purchases. With 73% of the UK population buying craft by 2020, the sector has now entered the mainstream market.

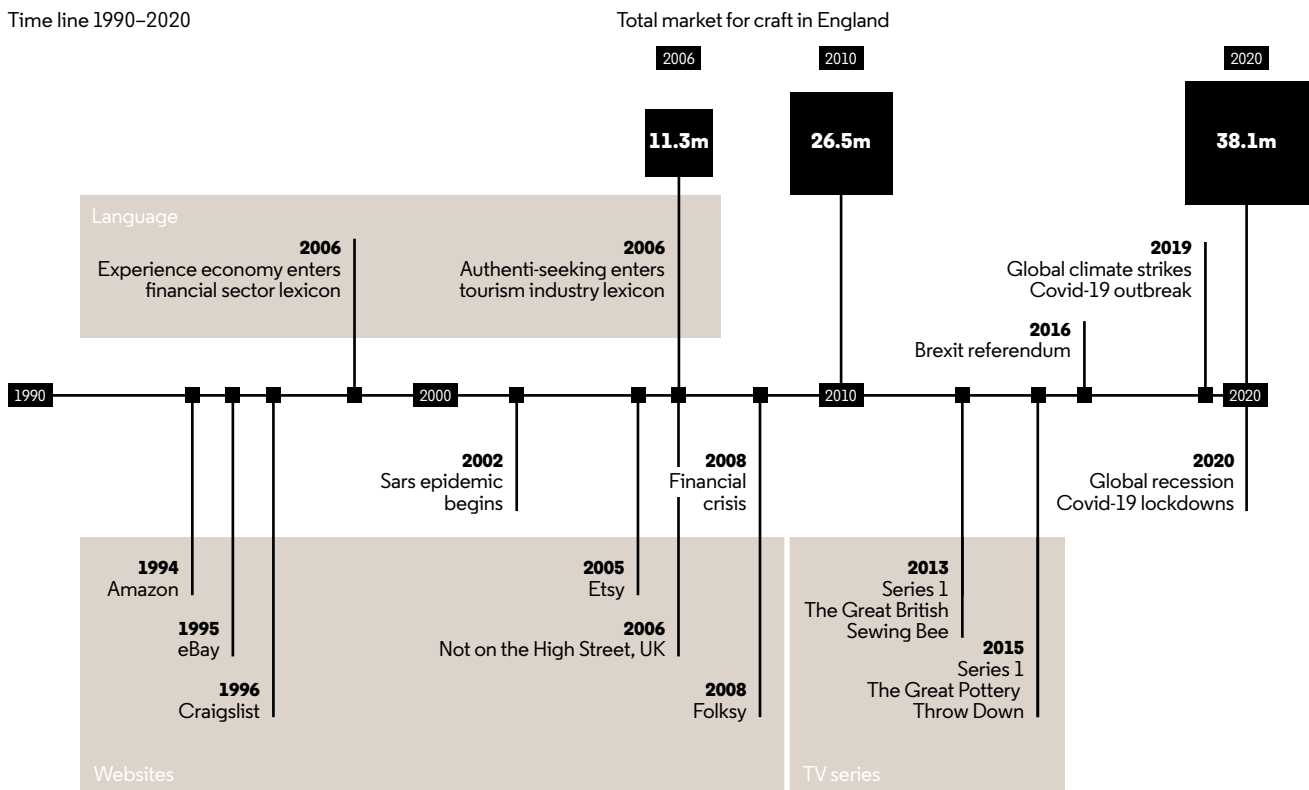
Since the original study on the craft market in 2006, the external context has changed significantly. These changes have affected routes to

market and selling platforms, driven an increase in the popularity of craft as a leisure activity, and forced shifts in consumer demand, towards value-centred products, services and experiences which meet emotional as well as functional needs. These factors have served as catalysts which have fuelled a growth in the volume and value of craft bought and sold in the UK between 2006 and 2020.

Table 2
Crafts Council market studies – England

	2006	2010	2020
Number of buyers	6.9m	16.9m	31.6m
Number of potential buyers	4.3m	9.6m	6.6m
Total market for craft in England	11.3m	26.5m	38.1m

Time line 1990–2020



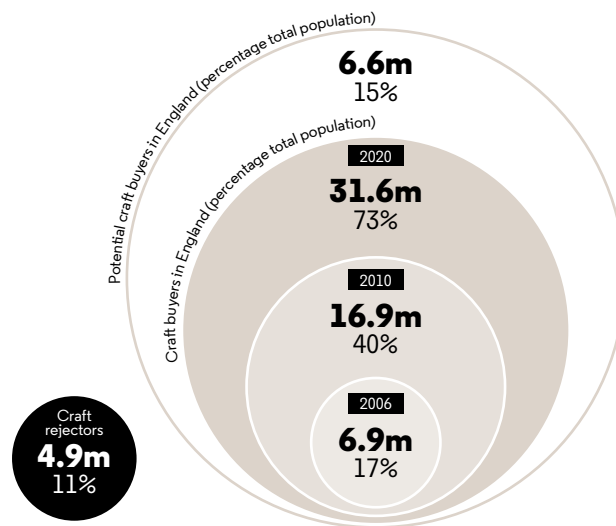
Total market for craft in England has more than trebled since 2006

There has been an increase from 6.9m to 16.9m people buying craft between 2006 and 2010, when external factors such as the introduction of online craft marketplaces such as Etsy in 2005 and Folksy in 2008 started to come into play. Between 2010 and 2020, the number of people buying craft has increased further to 31.6m people, as craft has moved into

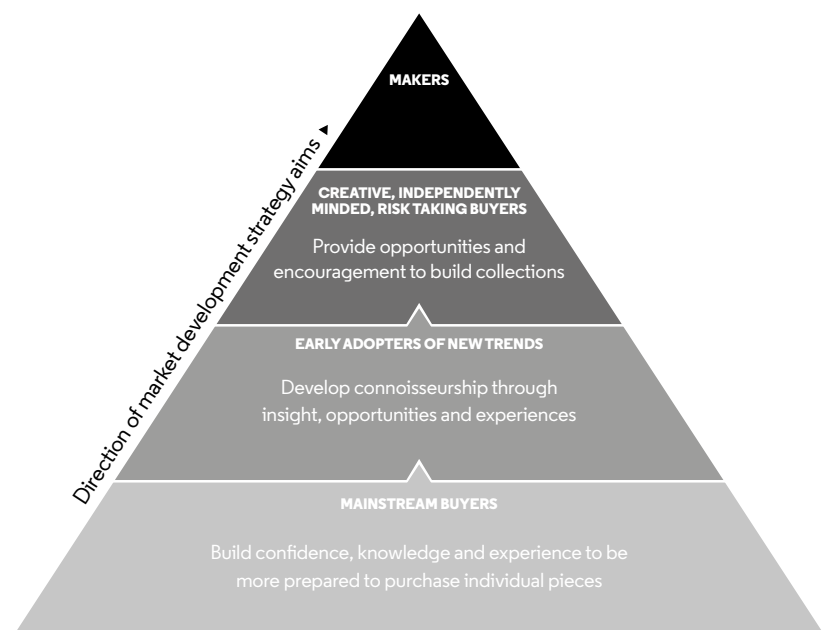
the mainstream. Over the same periods, the overall market (buyers and potential buyers) in England has increased from 11.3m in 2006 to 26.5m in 2010 to 38.1m in 2020.

The historic growth in the market in England and a summary of how the future market for craft can be developed in all four countries of the UK is summarised below.

Historic growth in the craft market in England



Strategies for developing the market for craft



Technological, economic, social and environmental trends drive growth in craft buyers

The trends described in Chapter 3 have each contributed to moving craft into the mainstream market. These trends have influenced both consumers' buying behaviours and their motivations for buying.

In the 2006 study for example, just 5% of buyers (332k people) had bought craft online. By 2010, when the percentage of households in the UK with internet access had increased from 57% to 73%,²⁷ and *Etsy* and *Folksy* had been established for a few years, 19% of buyers (3.2m people) had bought craft online. By 2020, with 99% of adults aged 16–44 in the UK online in 2019,²⁸ smart phone penetration in the UK at 76%,²⁹ *Etsy* and *Folksy* established for over a decade and joined by a proliferation of online craft marketplaces, 10.3m people (33%) of buyers have bought craft online.

There is evidence that the financial crisis in 2008 brought career changes with workers moving from single full-time professions to portfolio careers. At the same time, the concept of 'work-life balance' was emerging, with employers responding by offering part-time and flexible working, affording the opportunity for more second-career makers to take up craft. The ease of joining online marketplaces had removed barriers to entry for makers – at the end of 2018 for example, there were more than 220,000 active *Etsy* sellers³⁰ in the UK.

As a result of these and other factors there are now more people than ever buying and selling craft in the UK and craft is established as a mainstream market.

Four-fold increase in the total volume of craft sales between 2006 and 2020

As the number of buyers of craft in England has increased from 6.9m in 2006 to 16.9m in 2010 and then to 31.6m in 2020, there has been an associated four-fold uplift between 2006 and 2020 in the volume of craft objects bought annually from a living maker.

Whilst the volume of craft sales has increased across all disciplines since 2006, the rate of growth hasn't been uniform. Jewellery for example had the highest volume of sales in 2006 and 2020 and the highest volume uplift (+4.1m) whilst the rate of growth in volume of sales was highest for glass and metalwork. Looking at the two disciplines with the highest volume increases (jewellery and textiles), these are arguably the media where 'new' makers who have entered the marketplace since 2006 have focused their products.

27 www.statista.com/statistics/275999/household-internet-penetration-in-great-britain/

28 www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/bulletins/internetusers/2019

29 www.statista.com/statistics/539395/smartphone-penetration-worldwide-by-country/

30 Celebrating Creative Entrepreneurship Around the Globe, *Etsy*, 2019

Three-fold uplift in the total value of craft sales between 2006 and 2020

The uplift in the volume of sales has of course been accompanied by an increase in the total value of craft sales, increasing from £883m in 2006 to over £3bn in 2019. If the average price of craft sold had remained the same, then the percentage uplift in the volume of sales would have been matched by a similar uplift in the value of sales. However, this is not the case as the average price per object has decreased from £157 in 2006 to £124 in 2020.

More egalitarian market conditions and fewer barriers to entry for makers mean that whilst more people are now buying craft, they are buying the now more widely available lower value craft. As a result, the uplift in sales volume hasn't been matched by a commensurate uplift in value.

This means that the challenges faced by Master Craftspeople and Established Makers at the higher end of the sector remain similar to those identified in 2006 – they still need to be able to communicate the differentiation in their skill to help justify their higher prices. This issue is likely to be even more acute in 2020, with many of the 'new' buyers in the market being used to paying less for original, handmade objects.

An analysis of the average price by discipline shows how the market is becoming more fluid as the distinction between professional and everyday making becomes less visible. It's also likely to reflect the higher investment in infrastructure and set up costs in some disciplines and, in others, how making may now be taking place more in shared studios. Some makers may also intentionally cultivate buyers at lower price points.

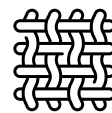


Jo Taylor © Russel Sach

Table 3

icons courtesy of flaticon

Volume, value and average price per object
of craft sales by discipline in England:
2006 vs 2020



	England	Ceramic	Glass	Wood	Jewellery	Textiles	Metalwork	
Volume	2020	24.7m	4.8m	3.0m	3.9m	6.0m	4.9m	2.2m
	2006	5.6m	1.5m	0.5m	0.7m	1.9m	0.8m	0.3m
	difference	19.1m	3.3m	2.5m	3.3m	4.1m	4.0m	1.9m
	% change	+340%	+226%	+538%	+475%	+219%	+498%	+589%
Value	2020	£3.057b	£428m	£473m	£662m	£931m	£310m	£252m
	2006	£883m	£323m	£73m	£58m	£316m	£88m	£25m
	difference	£2.174b	£105m	£401m	£604m	£615m	£223m	£228m
	% change	+246%	+33%	+548%	+1,041%	+195%	+252%	+908%
Average price per object	2020		£90.17	£158.94	£168.17	£155.39	£63.78	£114.92
	2006		£222.06	£155.39	£85.22	£168.27	£107.88	£77.86
	difference		-£131.88	+£3.55	+£82.95	-£12.70	-£44.11	+£37.06
	% change		-59%	+2%	+97%	-8%	-41%	+48%

Almost 38m craft buyers in the UK in 2020



Table 4

	Total	England	Wales	Scotland	N. Ireland
Buyers	37.7m	31.6m	1.9m	3.2m	1.1m
Potential buyers	8.0m	6.6m	421k	734k	208k
Total market	45.6m	38.1m	2.3m	3.9m	1.3m

In addition to the 31.6m craft buyers resident in England in 2020, there are a further 6.1m buyers across Wales (1.9m), Scotland (3.2m) and Northern Ireland (1.1m), with a total of 37.7m buyers of craft in the UK as a whole.

Although this study in 2020 was conducted across the four UK nations, the previous studies were England only. Historical comparisons in the report therefore relate to England, but in this section, we break down 2020 data across the four nations. Whilst there is no comparable data on the growth of the craft markets in Wales, Scotland and Northern Ireland, it is reasonable to assume that the trends observed in England have been replicated in the other countries of the UK too.

The volume of sales is clearly a reflection of the relative population of each nation but the *proportion* of the population who have bought craft is consistent across all four countries, ranging from 72% in Scotland to 75% in Northern Ireland, with 73% of the UK adult population having bought craft.

A comparison of the average number of pieces bought by buyers in each country shows that buyers in England are buying more objects across every discipline with the exception of jewellery.







The average value of work bought by discipline is also higher in England for glass, wood and jewellery with greatest parity in the average price of ceramics.

Across the four nations, the total value of the market for craft produced by living makers in the UK was **£3.38b** in 2019.

Table 5

icons courtesy of flaticon

Volume, value, average price and average number of objects bought by discipline in the UK: 2020

								
		Total	Ceramic	Glass	Wood	Jewellery	Textiles	Metalwork
England	Volume of craft sales	24.7m	4.8m	3.0m	3.9m	6.0m ▲	4.9m	2.2m ▼
	Avg no. of objects bought	—	2.81	2.13	2.19	2.77	3.27	2.98
	Avg price of object bought	—	£72.98	£108.54	£141.35	£120.08	£55.80	£111.73
	Value of craft sales	£3.057b	£428m	£473m	£662m	£931m	£310m	£252m
Wales	Volume of craft sales	1.5m	272k	195k	293k	458k ▲	232k	69k ▼
	Avg no. of objects bought	—	2.11	1.78	1.73	2.80	2.30	1.83
	Avg price of object bought	—	£78.73	£45.21	£66.77	£49.72	£47.65	£122.96
	Value of craft sales	£92m	£21m	£9m	£20m	£23m	£11m	£8.5m
Scotland	Volume of craft sales	2.6m	553k	291k	524k	630k ▲	466k	142k ▼
	Avg no. of objects bought	—	2.37	1.74	1.96	2.31	2.28	1.56
	Avg price of object bought	—	£67.75	£48.83	£79.66	£83.81	£90.60	£68.42
	Value of craft sales	£198m	£37m	£14m	£42m	£53m	£42m	£10m
Northern Ireland	Volume of craft sales	854k	179k	72k	155k	289k ▲	100k	59k ▼
	Avg no. of objects bought	—	2.25	1.89	1.68	2.82	1.77	1.90
	Avg price of object bought	—	£38.29	£51.07	£54.59	£36.94	£18.57	£32.65
	Value of craft sales	£33m	£7m	£4m	£8m	£11m	£2m	£2m
UK	Volume of craft sales	29.7m	5.8m	3.5m	4.9m	7.4m	5.7m	2.5m
	Value of craft sales	£3.381b	£494m	£500m	£732m	£1,017m	£366m	£273m

Laundry
Open
11am - 4pm



6

Craft consumers in 2020

In the previous chapter, we identified that the growth in the market for craft over the period of these three market studies (2006 to 2020) had been driven by an almost critical mass of social, economic and technological trends which have removed barriers to entry for both consumers and makers. This has facilitated growth by bringing into the market a swathe of buyers who are cautious in their craft buying habits, actively buying from living makers and buying at lower price points – the psychographic profile of the craft market has changed.

This chapter explores how this opening up of the craft market and its transition into a mainstream activity has been reflected in the profile of craft buyers. The mainstream market has acquired a taste for craft whilst at the same time the craft sector is maturing and scaling such that it can sell to a more mainstream consumer base.

The analysis identifies which types of buyers and potential buyers have increased the size of the market in England from 11.3m in 2006 to 38.3m in 2020; with the same trends likely to have influenced similar growth in Wales, Scotland and Northern Ireland.

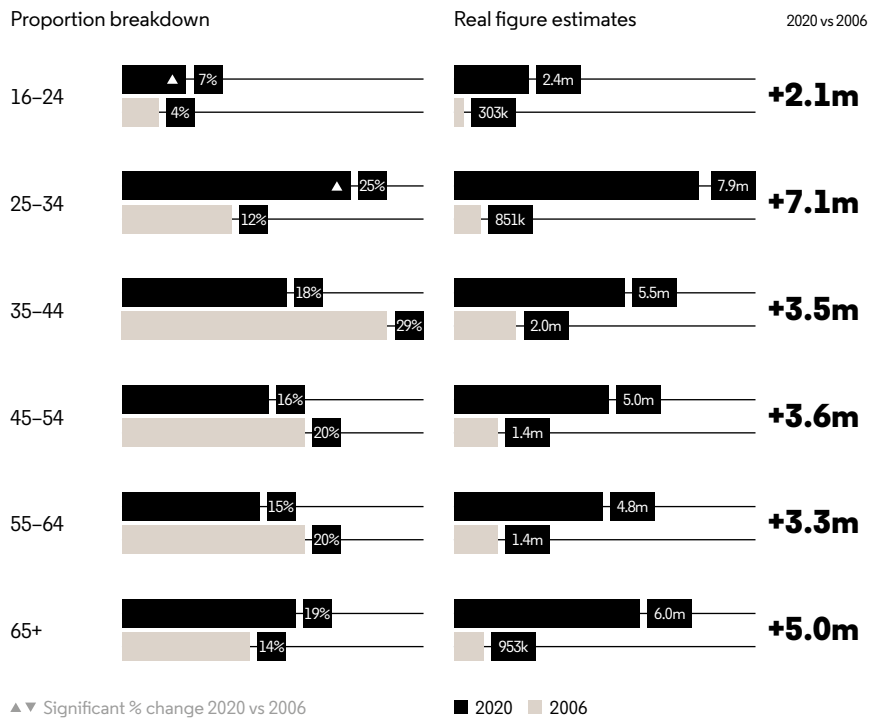
As the craft market now embraces the majority of people, it takes on a new character dominated by cautious and cost-conscious buyers.

Trends have democratised the market for craft

Demographically, compared to 2006, the craft consumer market in 2020 is younger, more ethnically diverse, less dominated by graduates and with more generalists. With the move into the mainstream, the profile of the craft market is now much more representative of the population than in 2006 – trends have democratised the market for craft.

The most statistically significant change in the demographic profile of craft buyers between 2006 and 2020 has been the increase in the younger age groups. In 2006, only 17% of buyers (1.1m people) were under 35. By 2020, this proportion has almost doubled, which in real terms has brought an additional 9.1m buyers under the age of 35 into the market for craft.

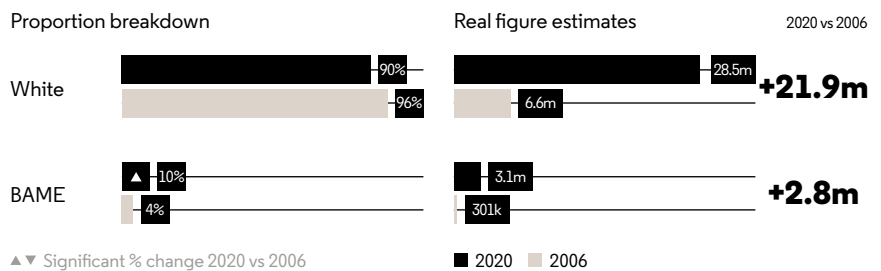
Age profile of craft buyers in England



This shift to a younger buyer profile has also driven the market for craft buyers to become more ethnically

diverse, and brought in an additional 2.8m buyers from BAME groups into the market for craft.

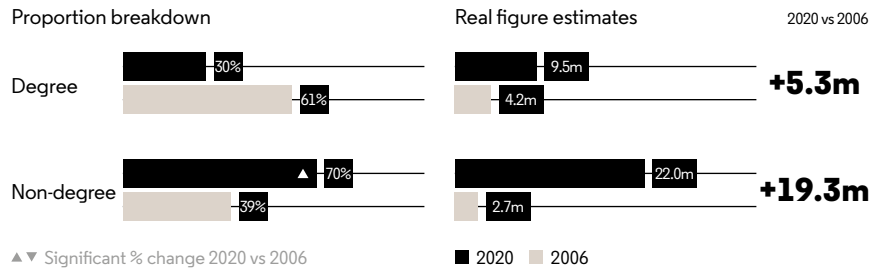
Ethnic profile of craft buyers in England



The democratisation of the market has also shifted the profile of buyers from being dominated by graduates in 2006 to non-graduates now being in the majority. This trend is set against the increase in the number of

university places on offer in England and the wider UK. For example, the number of graduates in England increased from 7.1m to 11.8m in the decade between the 2001³¹ and 2011³² Censuses.

Educational attainment of craft buyers



Younger, more cautious buyers have driven the growth in the craft market

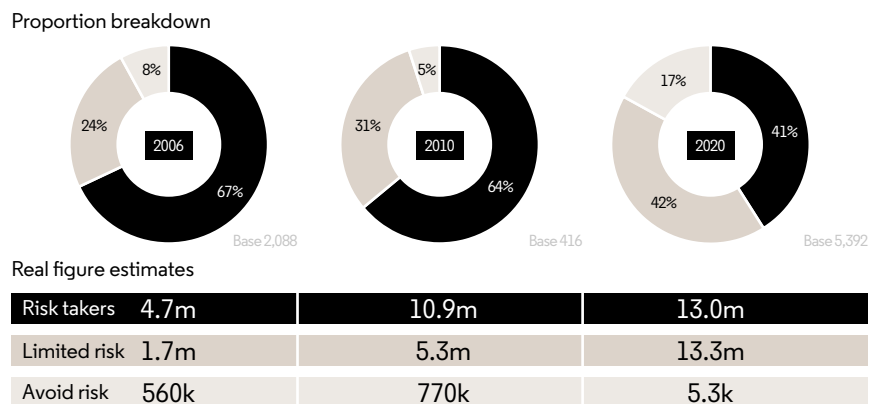
In 2006, the market of buyers was dominated by ‘risk takers’ – with 67% of buyers in this cohort. These are people, much like makers themselves, with creative, independent tastes who need little popular endorsement for their purchases.

By 2020, the proportion of risk takers in the market has decreased by a third to 41%, with the market of buyers now much more balanced with 42% of buyers being more cautious in their attitude to buying

craft. These are people who are fashion-followers, rather than fashion-leaders, who prefer to know that their purchases will conform to popular tastes and be admired by others.

As craft has entered the mainstream, the majority of the market is dominated by more of these cautious and risk averse, cost conscious buyers. This needs to be recognised in the strategies adopted to promote craft and in the marketing approaches of makers.

Risk profile of craft buyers in England



31 KS013 – Qualifications and students, 2001 Census, Office for National Statistics

32 KS501EW – Qualifications and students, 2011 Census, Office for National Statistics

Craft consumers in 2020

By looking at the type of craft which people have bought, their propensity to buy contemporary work from living makers, and their willingness to take risks, it is possible to establish which sub-groups of buyers have contributed to the growth in the market between 2006 and 2020.

Like-for-like comparisons can only be made with 2006 and 2010 at an aggregated level of three market sub-groups. However, in order to better understand the make-up of the market for craft in 2020, we have divided the market into nine sub-groups.

Profile of market sub-groups in England

Low level traditional	Nascent buyer	New entrant	Gen Z mainstream	Millennial mainstream	Mature mainstream	Early mainstream	Adventurer	Proto-collector
	Cautious	Cautious	Cautious	Cautious	Cautious	Risk takers	Risk takers	Risk takers
WOULD... buy craft but not from a living maker	WOULD... buy from a living maker	WOULD... buy from a living maker	WOULD... buy from a living maker	WOULD... buy from a living maker	WOULD... buy from a living maker	HAVE... bought craft from a living maker	HAVE... bought craft from a living maker	HAVE... bought craft from a living maker
Have never bought craft	Have bought craft	AGED <30	AGED 30-49	AGED 50+	MOST SPENT £70-£200	MOST SPENT £70-£200	MOST SPENT £200+	

Changes in the craft market in England:
number of buyers and potential buyers in
2006, 2010 and 2020

Low level traditional	Nascent buyer	New entrant	Gen Z mainstream	Millennial mainstream	Mature mainstream	Early mainstream	Adventurer	Proto-collector
2020 vs 2006 +0.3m	2020 vs 2006 +21.5m					2020 vs 2006 +5.1m		
2020 1.4m	2020 27.7m					2020 9.1m		
2010 0.8m	2010 16.4m					2010 9.3m		
2006 1.1m	2006 6.2m					2006 4.0m		

Between 2006 and 2010 there was a growth in the sub-group who indicated they'd buy cutting edge craft from 4.0m to 9.3m – in both of these studies this market represented a third of the overall market for craft. Between 2010 and 2020, this market segment has remained relatively static and whilst direct like-for-like comparisons aren't possible, it's estimated that this cohort now represents about 9.1m people. Because of the growth elsewhere in the market, this group now represents less than a quarter of the overall market for craft.

The area of the market that has grown the most between 2006 and 2020 is in the group of people who would buy work from a living maker but were more cautious in their buying. Since 2006, 21.5m people have entered the market. The market for traditional craft has remained relatively static across all three studies.

Amongst the cautious group which has driven the growth in the market, craft might once have been considered old fashioned; but for this group it is now acceptable and desirable to buy craft.

From the demographic changes in the profile of buyers it is evident that younger people have been getting into craft over the past 15 years. They have a general or often little knowledge but don't mind if they don't know about it, if they're not connoisseurs. Through mainstream TV programmes such as *The Great Pottery Throw Down*, having craft-based creative hobbies, going to craft workshops and classes and being able to readily view and buy craft online and at craft markets and farmers markets, craft is familiar and everyday to this new group of buyers.

Given that the market of buyers at the top of the craft market has remained relatively static over the past ten years, there is significant potential for encouraging this new emerging market cohort who are already buying from living makers to purchase more often, develop discernment, take bigger risks and spend more.

In order to better to understand the profiles and behaviour of these two broad market cohorts – those who are risk takers and the larger, more cautious cohort, these groups can be further divided into nine sub-groups. The risk-taking group can be sub-divided by the extent of risk which they are willing to take in their craft buying, using the value of their spend as a proxy.

Amongst the cautious group, there are clear life-stage differences in their behaviours and they can broadly be sub-divided into Gen Z, Millennials and Mature (Generation X) sub-groups. There are significant differences between these three sub-groups in terms of their Culture Segment profile; demographics; sources for buying craft and propensity to buy online; media consumption and engagement with social media (see [Chapter 2](#) and [Appendices](#)).

These three sub groups who have already bought from a living maker, present the greatest potential in developing the market – they are actively buying from living makers but need support mechanisms to persuade them take risks in their craft purchases (and cost of purchase is linked to this).


Craft consumers in 2020

Table 6
Market sub-group definitions

Sub-group	Definition
Proto-collector	Take risks in buying work – bought from a living maker – spent >£200 on highest purchase
Adventurous	Take risks in buying work – bought from a living maker – spent £70–200 on highest purchase
Early mainstream	Take risks in buying work – bought from a living maker – spent <£70 on highest purchase
Mature mainstream	Cautious in buying – bought from living maker – aged 50 or over
Millennial mainstream	Cautious in buying – bought from living maker – aged 30–49
Gen Z mainstream	Cautious in buying – bought from living maker – aged under 30
New entrant	Bought craft but not from a living maker
Nascent	Would consider buying from a living maker but not yet bought craft
Low level traditional	Wouldn't buy from a living maker

The relative sizes of these market sub-groups in the UK and in each of the four home nations individually are shown in the table below.

Table 7
Sub-group market breakdown for UK and home nations, 2020



Sub-group	Total		England		Wales		Scotland		N. Ireland	
	%	n	%	n	%	n	%	n	%	n
Proto-collector	6%	2.9m	6%	2.4m	7%	163k	6%	229k	3%	39k
Adventurer	5%	2.3m	5%	1.9m	6%	133k	5%	199k	7%	85k
Early Mainstream	13%	5.7m	13%	4.8m	10%	230k	14%	549k	13%	168k
Mature Mainstream	10%	4.3m	9%	3.5m	10%	223k	10%	404k	13%	170k
Millennial Mainstream	14%	6.4m	14%	5.4m	12%	276k	14%	558k	11%	147k
Gen Z mainstream	6%	2.6m	6%	2.2m	5%	108k	5%	199k	6%	83k
New entrant	26%	11.8m	26%	10.1m	27%	610k	21%	824k	26%	335k
Nascent buyer	17%	7.8m	17%	6.4m	18%	415k	19%	726k	16%	208k
Low level traditional	4%	1.8m	4%	1.4m	5%	117k	5%	198k	4%	51k

The distribution of market sub-groups is relatively consistent across the four nations of the UK, with no statistically significant differences in the proportions across England, Wales, Scotland and Northern Ireland.

The key characteristics of each of these sub-groups is summarised below:

Table 8
Sub-group personae: Part 1

	Demographics	Top 3 disciplines	Top 3 routes (F2F)
Proto-collector	▲ 30% household income >£50k	▲ 57% ceramics	46% craft fairs
	▲ 58% male	▲ 52% jewellery	▲ 40% craft / design shop
	▲ 46% graduates	▲ 43% woodwork	▲ 36% direct from maker
Adventurer	25% household income >£50k	▲ 47% jewellery	▲ 56% craft fairs
	▲ 52% female	▲ 45% woodwork	▲ 41% craft market
	▲ 39% graduates	▲ 36% glasswork	▲ 37% craft / design shop
Early Mainstream	15% household income >£50k	▲ 43% jewellery	▲ 51% craft fairs
	▲ 64% female	32% ceramics	▲ 37% craft market
		31% woodwork	26% craft / design shop
Mature Mainstream	16% household income >£50k	▲ 34% jewellery	▲ 49% craft fairs
	▲ 58% female	32% ceramics	▲ 36% craft market
	▼ 2% BAME	26% woodwork	▲ 31% craft / design shop
Millennial Mainstream	▲ 30% household income >£50k	▲ 45% jewellery	44% craft fairs
	55% female	▲ 44% woodwork	▲ 28% craft market
	▲ 11% BAME	▲ 43% ceramics	▲ 27% craft / design shop
Gen Z Mainstream	16% household income >£50k	▲ 45% ceramics	▼ 32% craft fairs
	▲ 42% children at home	▲ 44% jewellery	28% craft / design shop
	▲ 16% BAME	43% woodwork	▲ 29% homeware store
New entrant	53% female	▼ 22% jewellery	33% craft fairs
	▼ 25% graduate	▼ 13% woodwork	▼ 22% craft market
		▼ 13% ceramics	▼ 22% craft / design shop
Nascent buyer	▼ 25% graduate		
	▼ 23% children in the household		
	▼ 25% live in London / South East		
Low level traditional	▲ 39% household income <20k	▼ 11% jewellery	17% craft fairs
	▲ 45% aged 65+	▼ 2% jewellery	▼ 10% craft market
	15% graduates	▼ 2% jewellery	▼ 14% craft / design shop

▲ ▼ Where the percentage is significantly different from the market overall

Craft consumers in 2020

Table 9

Sub-group personae: Part 2

	Top 3 routes (online)		Participation (12 months)	Top 3 motivations
Proto-collector	▲ 42% bought craft online	52% Etsy	▲ 66% creative hobbies	▲ 53% beautiful objects appeal
	29% NotHS	21% maker's website	▲ 18% craft workshops 28% residentials	▲ 51% beautiful objects in home 47% unique gift
Adventurer	▲ 40% bought craft online	53% Etsy	▲ 66% creative hobbies	▲ 62% admire human skill
	32% NotHS	19% maker's website	▲ 13% craft workshops 18% residentials	▲ 60% unique gift ▲ 59% beautiful objects appeal
Early Mainstream	35% bought craft online	56% Etsy	▲ 66% creative hobbies	▲ 55% unique gift
	20% NotHS	15% maker's website	▲ 08% craft workshops 19% residentials	▲ 37% beautiful objects ▲ 38% support craft
Mature Mainstream	▼ 21% bought craft online	▼ 37% Etsy	48% creative hobbies	▲ 58% unique gift
	▲ 40% other online	21% NotHS	5% craft workshops ▼ 19% residentials	▲ 52% admire human skill 48% beautiful objects appeal
Millennial Mainstream	▲ 47% bought craft online	56% Etsy	▲ 65% creative hobbies	50% unique gift
	27% NotHS	17% maker's website	7% craft workshops 15% residentials	48% support craft 47% beautiful objects
Gen Z Mainstream	▲ 57% bought craft online	▲ 63% Etsy	▲ 73% creative hobbies	47% unique gift
	20% NotHS	16% Made.com	9% craft workshops ▲ 28% residentials	40% beautiful objects 33% support craft
New entrant	▲ 21% bought craft online	▼ 41% Etsy	▼ 45% creative hobbies	48% unique gift
	25% NotHS	8% maker's website	▼ 2% craft workshops ▼ 5% residentials	44% beautiful objects 43% admire human skill
Nascent buyer			▼ 29% creative hobbies	▼ 45% unique gift
			▼ 1% craft workshops ▲ 7% residentials	42% beautiful objects 39% admire human skill
Low level traditional			▼ 28% creative hobbies	▼ 24% unique gift
	▼ 10% bought craft online		▼ 2% craft workshops 9% residentials	▼ 23% beautiful objects ▼ 21% admire human skill

▲ ▼ Where the percentage is significantly different from the market overall

The sub-groups are described here by their demographics, behaviours and drivers for buying. In order to target and communicate with the market of buyers and potential buyers, it is vital to understand people's cultural values, attitudes and motivations. These cultural values define the person and frame

their attitudes, lifestyle choices and behaviour. Morris Hargreaves McIntyre has developed a sector-specific segmentation system (Culture Segments) for the cultural sector. Culture Segments is designed to be more subtle, granular and sophisticated than other non-sector specific segmentation systems.

Essence, Expression and Stimulation key segments amongst craft buyers

An analysis of the profile of the market sub-groups that are taking risks in their buying and already actively buying from living makers reveals three standout Culture Segments – Essence, Expression and Stimulation which are over-indexing (i.e. appearing higher than average) relative to the market (highlighted in the table). Detailed pen portraits of these segments are appended.

Table 10
Sub-group Culture Segments Index

	Essence	Expression	Affirmation	Enrichment	Stimulation	Release	Perspective	Entertainment
Proto-collector	171 ▲	167 ▲	130	63	104	79	94	40
Adventurer	245 ▲	113	78	78	163 ▲	89	80	39
Early Mainstream	151 ▲	104	93	88	130	90	104	68
Mature Mainstream	96	18	79	156	70	65	119	63
Millennial Mainstream	89	158 ▲	101	77	135	110	56	94
Gen Z Mainstream	96	98	230 ▲	46	152 ▲	148	53	105
New entrant	81	83	118	114	87	106	114	98
Nascent buyer	56	49	62	107	66	100	154	163
Low level traditional	11	51	0	131	24	118	104	220



Daniel Reynolds, Collect 2020
© Iona Wolff

7

The size and shape of the sector in 2020

This chapter draws from the data gathered in the makers' survey and looks at the sector from their perspective in terms of the values of their sales and channels.

This reveals a very different landscape from that found in 2006 and 2010, with many new makers facilitated by the development of e-commerce and an increase in the number of selling opportunities. Makers no longer need to rely on a third party, studio or physical presence to be able to sell in the UK and abroad.

More makers and more diverse makers in 2020

At the time of the 2006 study, there were an estimated 32,000 professional makers in England and Wales, generating a turnover of £826m, which at that time was greater than the fishing, forestry and logging sectors, or the manufacturing of bicycles or motorcycles and sports goods.

In the interim, social, technological and economic factors in particular have changed the 'universe' of makers in the UK. Whilst it is not possible to make a direct like-for-like comparison on the number of makers who are earning their living through craft in the UK in 2020, it is likely that this figure far exceeds 32,000, with the total volume and value of craft sales having increased three to four-fold over the same period. Online platforms have fuelled much of this growth, both in the number of makers and the volume and value of sales. In December 2018, *Etsy* reported that there were 220,000 active sellers in the UK with a further 9,000 makers on *Folksy*.

It is likely that in 2020, the universe of makers is less homogenous than in 2006. In 2006, 85% of makers were in one segment. These were makers

who were primarily concerned with production and with selling to a local market. They were the majority of professional makers – people who were driven to live by their creativity. Most held modest aspirations, their main criteria for success was selling their work to people who liked it and being able to live as far as possible by doing what they loved. There were many very successful entrepreneurs in this group who managed to make a good living from sales and commissions.

The wide-ranging changes in the sector and in the characteristics of makers mean that the segmentation developed in 2006 is no longer fit-for-purpose in the second decade of the 21st Century. To reflect the changes in the sector, the makers study in 2020 included representation from across a broader base of makers. A new makers segmentation model has been developed in order to better understand the needs of different makers, although as will become evident in the analysis, many makers needs are shared, common needs, independent of their career stage or their level of practice.

The size and shape of the sector in 2020

Table 11

Definition of maker groups

Maker group	Definition
Master Craftsperson	Established 5+ years and shown at international galleries or art fairs
Established Professional Maker	Established 5+ years, not shown at international galleries or art fairs, sold through professional channels or earn their living solely through selling work or through craft related activities
Early Career Professional Maker	Established 1–4 years, sold through professional channels or earn their living solely through selling work or through craft related activities
Emerging Maker	Established less than a year, sold through professional channels or earn their living solely through selling work or through craft related activities
Occasional Maker	Not sold through professional channels; don't earn a living solely through selling



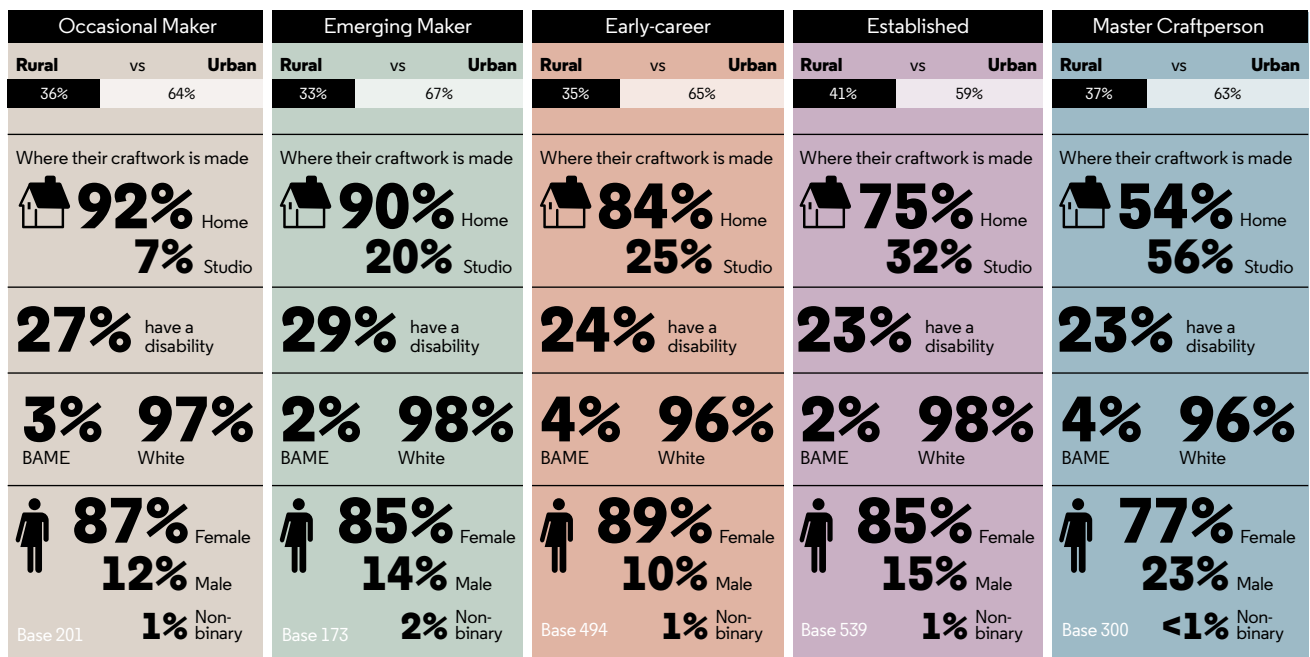
Great Northern Contemporary Craft Fair 2019 © Jess Boulton

Sector is becoming more inclusive but BAME representation is still low

In 2020, the majority of makers across all groups are female. The gender imbalance in the sector has been amplified since 2006; as 77–89% of makers across maker types were female in 2020 compared with 66% in 2006.

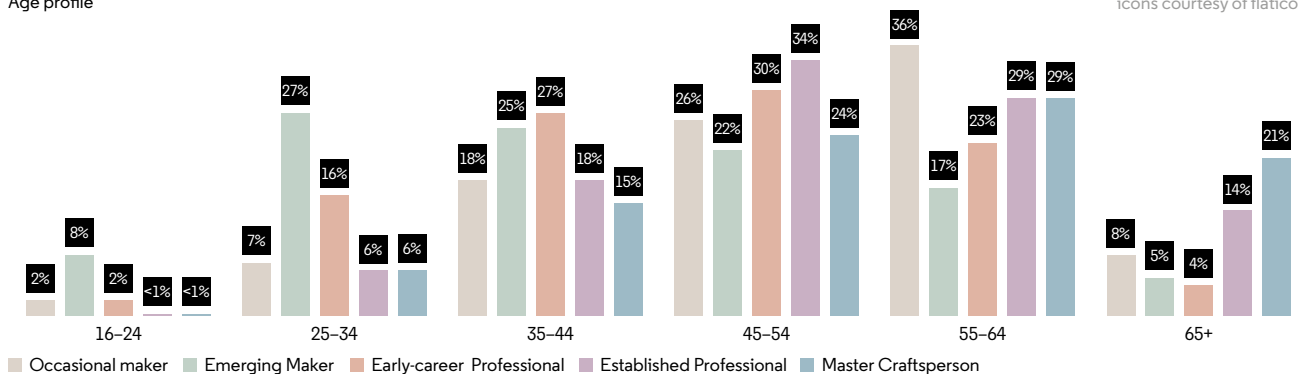
Across all maker groups, the proportion of disabled makers has more than doubled since 2006, with around a quarter of makers now having a disability compared to only 9% of makers in 2006. Craft in 2020 is succeeding in offering an income stream and creative fulfilment for a high proportion of makers with disabilities, but the sector has to go further to ensure craft is an inclusive space for all ethnicities and genders, with the proportion of BAME makers remaining unchanged compared to 2006 at 2–4% across maker types.

UK maker groups



Age profile

icons courtesy of flaticon



Portfolio careers are common for makers in 2020

Table 12

Employment profile by maker group

In 2020, less than half of Master Craftspeople (45%) and Established Professional Makers (49%) earn their living solely through selling their work. In the 2006 study, 89% of makers worked in craft either full-time (59%) or part-time (30%), with only 11% of makers just making work occasionally for sales.

Earn living through selling	MC	EPM	ECPM	Emerg.	Occas.
Yes	45% ▲	49% ▲	32%	23% ▼	—
No	55% ▼	51% ▼	68%	77% ▲	100% ▲

▲ Significantly higher than maker average ▼ Significantly lower than maker average

Table 13

Activities for supplementary income by maker group

Teaching at craft workshops or courses is the most common source of supplementary income for Master Craftspeople and Established Professional Makers, whilst Early Career Professional Makers and Emerging Makers, who are less likely to earn their living through selling are mainly supplementing their income through non-craft related activity.

Supplementary income activity	MC	EPM	CPM	Emerg.	Occas.
Teaching in formal education	23% ▲	13%	10%	10%	—
Teaching at craft workshops or courses	45% ▲	30% ▲	22%	10% ▼	—
Teaching at residential workshops or courses	15% ▲	3%	2%	—	—
Freelance work connected to craft	38% ▲	23%	16%	14%	—
Through other work connected to craft	4%	5%	7%	8%	—
Through other (non-craft) freelance work	16%	14%	22%	17%	17%
Through other (non-craft) work	10% ▼	30%	36%	36%	41% ▲
Through sponsorship/benefactor(s)	2%	—	1%	1%	—
Through grants	13% ▲	0% ▼	2%	1%	—
Other	20%	21%	15%	17%	19%
No supplementary income	7%	8%	9%	13%	24% ▲

▲ Significantly higher than maker average ▼ Significantly lower than maker average

Makers are more likely to be self-taught in 2020

In 2006, 65% of makers had a formal craft qualification. Amongst makers in 2020, only Master Craftspeople are more likely to have a formal education or vocational qualification related to craft.

Whilst there is no specific data in the 2020 survey on the proportion

of makers for whom craft is a first career, it might be reasonable to assume that a number of makers without a craft qualification are second-career makers. However, this is not a new phenomenon, less than half (46%) of makers in 2006 were first career makers.

Table 14

Formal or vocational qualifications by maker group

Craft qualification	MC	EPM	ECPM	Emerg.	Occas.
Yes	79% ▲	51%	48%	53%	9% ▼
No	21% ▼	49%	52%	47%	91% ▲

▲ Significantly higher than maker average ▼ Significantly lower than maker average

Income levels for makers remain low

The median annual salary for full-time employees in the UK in 2019 was £30,350,³³ whilst the median salary for the self-employed in the UK in 2016 was just over £18,000.³⁴ Across all maker groups, the majority

reported a profit of less than £30,000 from selling their work in the latest financial year. Even amongst Masters Craftspeople, only 16% reported profits from selling in excess of £30,000.

Overseas sales have increased since 2006 but further support is needed

The emergence of online platforms since the original makers' study in 2006 have clearly facilitated international sales of UK craft, albeit the development of online platforms is only one aspect in increasing export sales. Whilst there is no like-for-like data available from the two makers' studies undertaken in 2006 and 2020 on the volume and value of international sales, there is some data to support the assertion that exports of UK craft have increased.

In the 2006 study, the sample was focused on professional makers in England and Wales and therefore wouldn't have included the breadth of makers consulted in the 2020 study. In 2006, 18%

of professional makers had ever sold internationally – specifically to international collections. Taking Master Craftspeople, Established Professional Makers and Early Career Professionals as the most closely aligned with the 2006 makers' sample, around half (49–53%) of these makers have sold work internationally in the previous 12 months – almost three times the proportion in 2006. Whilst a lower proportion of Emerging and Occasional Makers have sold internationally, a third of both of these segments (29–34%) have sold their work overseas in the past 12 months.

In terms of the key markets for international sales, the US is by some

³³ www.statista.com/statistics/1002964/average-full-time-annual-earnings-in-the-uk/

³⁴ Trends in self-employment in the UK, Office for National Statistics, 2018

The size and shape of the sector in 2020

margin the largest single market where makers had sold their work. This supports the latest export sales data for craft published by the Department for Culture, Media and Sport, where sales of craft to the US accounted for £517m (11%) of the £4.6b of craft export sales.

Whilst most makers are generating some income from overseas sales, the proportion of total sales which overseas markets accounts for is low. Only 11% of Master Craftspeople generated more than half of their value of sales by selling overseas, whilst for other makers, this ranged from between 6–8%.

However, whilst technology has opened up the market for international sales, makers are still in need of additional support to help them increase their export sales. Qualitative responses to the makers' survey suggest that some makers are reliant on online marketplaces for international sales and need support and guidance in finding alternative routes to market, particularly for the US market.

If I move away from Etsy to a standalone website, I'm not sure whether I would reach those American buyers.

I'd like to be able to have my own e-commerce website instead of relying on Etsy.

Several makers felt that having access to an advisor or mentor who could facilitate introduction to international intermediaries; identify the optimum showcases or craft fairs to attend; share knowledge on cultural preferences e.g. where different products sell best; provide business support and advice on how to access grants and bursaries to attend international fairs would help them sell more work overseas.

A very useful role for the Crafts Council would be to have an advisor who could supply information to help with customs declarations, availability of funding for makers etc. and generally be well informed in this area.

Some makers are looking to international sales as an alternative rather than a supplement to UK sales because they feel their local markets in the UK are now challenging to sell in.

An [international] business advisor that could help me that knows about craft shows like Schmuck in Munich to enable me to move out of the saturated Brighton market.



Collect 2020 © Iona Wolff

Ethical making and sustainability important to makers as well as consumers

The social trends driving ethical consumerism and the heightened consciousness and commitment to environmental sustainability, is directly reflected in consumers attitudes to buying craft.

Across the current and potential market for craft, almost half (45%) look for ethical or sustainably produced objects; this is significantly more important for Gen Z Mainstream (55%), Adventurers (52%) and Proto-collectors (52%). Concerns about the impact of air freight and the associated carbon footprint alongside the 'localism' movement also mean that consumers are more likely than not, to have a preference for buying locally-produced objects. More than half (55%) of the market indicated that they prefer to buy objects that they know are locally made.

The concerns and values-focused attitudes of consumers in buying craft are reflected in the approach of makers. Makers were asked about the importance of a number of factors related to ethical making including:

- Use of sustainable raw materials
- Sourcing raw materials locally
- Use of ethical supply chains
- Use of recycled materials
- Use of Fairtrade materials

Across all of these factors and across all types of maker, the use of sustainable raw materials and ethical supply chains were the most important considerations.

While there is no direct evidence from the population survey on consumers' wider perceptions on the relationship between craft and ethical consumerism, it might be reasonable to assume that the artisanal associations of craft might mean that the use of responsibly sourced, sustainable materials is even more important or an expectation amongst consumers when buying craft than it might be for other products and services. Given that ethical making is as much of a concern to makers as it is to consumers, it is vital that makers communicate this to their prospective buyers.

Some makers felt that there is a role for the Crafts Council in enhancing consumers' understanding of the ethical, as well as the monetary, value of craft.

[The Crafts Council] should champion sustainability within the craft sector and familiarise the populace about the (often) intrinsic closed loop sustainability within the crafts.

Makers are harnessing technology to promote their work but need support in optimising their approach

The development of e-commerce has catalysed an increase in the number of makers able to reach the growing consumer market. Makers no longer need to rely on a third party, studio or physical presence to be able to sell in the UK and abroad. The access to new, more democratic online platforms, as well as craft markets, has helped fuel the growth in the market.

There is clear evidence in comparing the two makers' studies in 2006 and 2020, that makers at all levels are now using online channels extensively to promote and sell their work.

In 2006, 42% of professional designer-makers had their own website. By 2020, 68% of all makers have a website, with Master Craftspeople (84%) and Established

Professional Makers (77%) the most likely to promote and sell their work through this channel. Whilst the proportion of makers who have sold work through their own website is not necessarily a measure of the efficacy of this channel, particularly in the context of buyers still preferring to buy face-to-face, for Master Craftspeople, their individual website (51%) is the most common digital channel through which they've sold their work. This proportion compares against 14% of professional makers who had sold work through their own website in 2006.

Whilst the use of technology is common across all makers surveyed, advice and support in optimising the use of technology were the training needs identified by the highest proportions of makers, specifically advice or training on social media and promotion (44%) and how to use online platforms to sell work (46%).

Across the different type of makers, Emerging Makers were the more likely to need this type of training, and while more established makers were less likely to feel they wanted training of any kind, around 40% of Master Craftspeople and Established Professional Makers identified the need for training in social media promotion and in the use of online platforms.

For some makers, maintaining an online and social media presence is also challenging in terms of the time needed to keep these channels 'up-to-date', particularly in the context of the higher expectations of consumers based on their browsing and buying experiences with other online retailers.

My website is devoid of images as I predominantly make one off unique objects.

Master Craftspeople are the most connected maker group

Master Craftspeople are the most likely group to be directly connected to other makers and potential buyers through collectives, membership of associations mailing lists.

It will be even more vital to maintain and develop these networks in a post-pandemic, post Brexit world.

Make as many contacts as possible and forge relationships wherever you go.

Table 15

Networks and connections by maker group

Connections	MC	EPM	ECPM	Emerg.	Occas.
Belong to collective	48% ▲	45%	40%	33%	29% ▼
Member of association	62% ▲	35%	26% ▼	24% ▼	12% ▼
Mailing list or e-list	55% ▲	34%	27%	13% ▼	7% ▼

▲ Significantly higher than maker average ▼ Significantly lower than maker average

Support for a Crafts Council kitemark but would need to be underpinned by a campaign to educate and inform

The increased numbers of makers selling craft and the increased volume of often lower price objects now available to consumers has made the need to be able to explain to consumers the higher value and price of their work even more acute in 2020 than it was in 2006. Alongside this, whilst consumers have the technology to search for craft at their fingertips, there is a feeling amongst makers and consumers to a similar extent that buyers have difficulty in locating makers if their searches have to be focused on named makers.

46% of makers supported the introduction of a Crafts Council kitemark to help buyers identify objects of recognised quality, collectability and originality. Support was stronger amongst Early Career and Emerging Makers. However, some feel that this would need to be supported by a broader marketing campaign to raise the general public's awareness of the Crafts Council, in order for endorsement to

mean something to consumers; and focus the campaign on educating and informing the UK public on the value of craft.

Make it [Crafts Council] more visible nationwide. Arts Council England is familiar to most people; Crafts Council is not. The vast majority of people who walk in my studio have no idea the UK has a Crafts Council. If the Crafts Council's activities mean something to the great British public, by association with the Crafts Council, perhaps more people would have confidence to buy.

I think a campaign on the time that goes into real craft, what constitutes high quality work, what doesn't, whether something will last or not, that a long life span is a beneficial thing, especially given our current environmental situation and that we shouldn't be living in such a throw-away society, would all be worthwhile .

Searchable databases welcomed but need to have extended search functions

Almost two-thirds (64%) of makers feel that an easily accessible, centralised, sign-posted searchable database would help buyers and potential buyers find craft objects to buy. Whilst the Crafts Council's Directory currently has search functions based on maker's name, disciplines, materials, price range and location, the search function could be extended to include visual tags, where potential buyers could look for objects based on colour or pattern or style without needing to know a maker's name for example.

If the kitemark were introduced, this could be another search category.

Consumers are also now used to the algorithms used by Amazon and other major online retailers which point them in the direction of similar musicians, films or authors – 'Customers who viewed this item also viewed ...'. A similar function would expose potential buyers to a wider range of makers beyond those they are already familiar with and buying from.

Makers training needs are unchanged from 2006

This section looks at the training needs of makers. The purpose was to find out makers’ levels of awareness of training opportunities, what topics they had had training in, what topics they sought training in, as well as their preferred training formats.

As might be expected, Occasional and Emerging Makers were less likely to know where to look for training versus their professional, established counterparts. As might also be expected, the training needs of Early Career Professional Makers and Emerging makers were the most substantial, whilst – for different

reasons – Occasional and Master Craftspeople felt training was less of a priority. The following pages unpick these findings in greater detail.

But first of all, what do we mean by ‘training?’ We tested participation in free and paid training courses and queried a range of topics covering the skills required to successfully develop and manage a craft business in the UK in 2020. This included business development and management skills, marketing and branding, networking and communication, working with intermediaries and technical skills development.

Emerging and Everyday Makers were unsure of where to look for training

Querying makers’ awareness of where to seek training revealed the answer we might expect. Makers who identified as a Master Craftsperson are significantly more likely than any other type of maker to say they knew where to go to seek training for their craft business (69%). Meanwhile, Emerging makers (34%) and

Occasional (31%) are significantly less likely to know where to go to find out about training, despite being the maker groups that could most benefit from it.

This highlights a knowledge deficit that the Crafts Council and partners could perhaps seek to address.

Table 16

Proportion of makers that knew where to find out about craft-related training

Criteria	MC	EPM	ECPM	Emerg.	Occas.
Yes	69% ▲	54%	46%	44% ▼	31% ▼
No	31% ▼	46%	54%	68% ▲	69% ▲

▲ Significantly higher than maker average ▼ Significantly lower than maker average

Two ends of the same scale: Everyday Makers and Master Craftspeople do not desire training

A significant proportion of Occasional Makers (42%), Established Professional Makers (42%) and Master Craftspeople (43%) all said they had not undertaken training in the past 12 months – and didn't intend to do so in the future either. It seems reasonable to infer that Master Craftspeople did not feel they required training, whilst Occasional Makers, perhaps, did not feel their craft-making is at a level or intensity for it to be relevant to them.

I built my business up gradually without any grants or loans. I believe this is the best way to start. And

these days anyone can take his own photographs and set up his own website. If you can't, then setting up a business probably isn't for you. Also, there is plenty of advice online about marketing etc.

Those who have been on a training course in the past 12 months were Early Career Professional Makers. One quarter (25%) of this cohort have been on a paid training course, significantly higher than any other type of maker. A further 16% had been on a free training course (and this was comparable to the average maker).

Half of Emerging Makers intended to attend a training course in future – despite not being very likely to know where to look for it

Half (50%) of Emerging Makers have not been on a training course in the past 12 months, although they intended to in the future, and this is a much higher proportion than any other group of makers. But, as we know from Table 16, they were unsure where to find it.

I have learnt my skill set through a number of part time adult ed classes, not through a qualification course. Ideally, I would like to attend several more specific targeted courses on aspects of jewellery making which have not been covered in previous courses, but it is difficult to find these courses and to afford them. As a sole trader I sometimes feel like I'm floundering with no-one to turn to for support and mentoring.

Makers' qualitative responses to the main makers' survey and the qualitative add-on survey indicated that funding for training is a need in its own right – and that makers are not sure what funding opportunities are open to them, or how to apply.

I am trying to develop my Metal Etching business. I really need a business advisor that could help me that knows about craft shows

to enable me to move out of the saturated Brighton market. I could also do with advice on grants or funding for this.

Help with marketing, promotion and photography, for me personally. I wouldn't know where to get financial support for this other than self-funding.

The maker cohort that is most likely to have paid for craft-related training undertaken in the past with a grant are Master Craftspeople (19%; the next highest cohort is Established Professional Makers, at 7%).

Nevertheless, there appears to be a gap in support for Early Career Professional Makers, 55% of whom have paid for their training personally – significantly higher than the proportion who had received a grant to do so (4%).

[I need] assistance to travel to London to attend training sessions [relevant to me].

As might be expected, the majority of Emerging Makers (57%) and Occasional Makers (58%) have never been on a paid training course.

Makers most frequently sought training/advice on social media and marketing

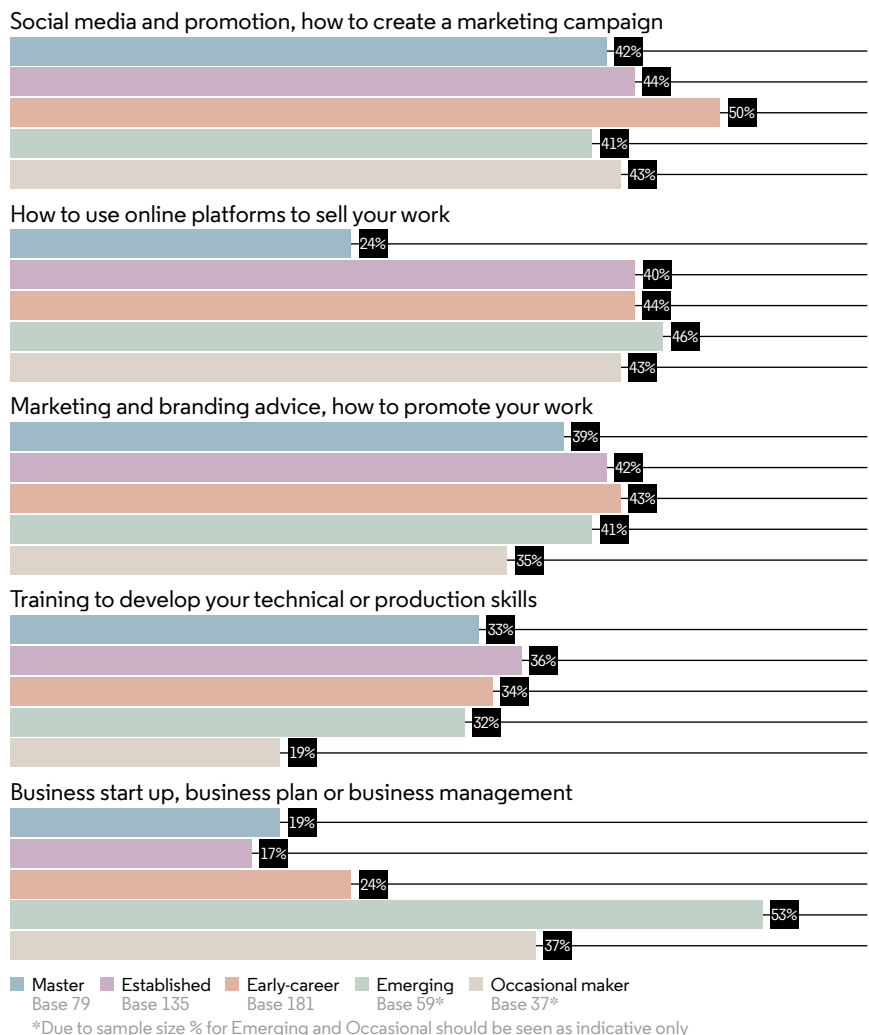
Makers across the board are united in the topics they had sought training or advice on. This indicates that they may operate at different levels of the market and via different selling channels, but that their concerns and needs are broadly comparable.

An average of 45% of all makers surveyed have sought advice or training on social media and promotion, how to create a marketing campaign, in the past 12 months. Similarly, 41% have sought marketing and branding advice, how to promote their work.

Across all cohorts, the topics makers have received training or advice on in the past 12 months were fairly similar, as indicated in the model below.

The two notable exceptions are Master Craftspeople, who were significantly less likely to have sought training or advice on how to use online platforms to sell their work (24%), versus all other maker types; and Emerging Makers, who are significantly more likely (versus all other maker types) to have sought advice/training on business start-up, business planning or business management (53%).

In which of the following areas have you received training or sought advice in the past 12 months? (Top five)



Early Career Professional Makers had most future training needs

Looking at the maker groups and the topics they wanted training or advice on in the future to develop their craft business revealed no surprises. Early Career Professional Makers over-indexed in (i.e. appearing higher than average) nearly everything versus the average maker, including:

- Marketing and branding advice (53% versus 45%)
- How to apply for grants/bursaries/ financial support (47% versus 36%)
- How to photograph your work (43% versus 37%)
- Funding and financial support for your business (43% versus 30%)
- How to work with galleries and commissioners (42% versus 32%)

Emerging Makers are also significantly more interested in receiving training or advice in future on a number of topics, such as how to use social media to sell your work (55% versus 46%) media and promotion (54% versus 44%) and how to apply for grants/bursaries/ financial support (48% versus 36%).

The need of Early Career Professional Makers and Emerging Makers for training and advice on funding and how to apply for it ties in with the findings of the makers' qualitative add-on survey, as detailed above. The top two future needs of Emerging Makers are also notable for the fact they are primarily digital needs; evidence of the impact of e-commerce on the direction makers envisage taking their craft business in.

[I'd like training in] social media marketing; updated financial admin skills; mentoring about the quality and development of my work.

These two maker groups – Early Career Professional Makers (41%) and Emerging Makers (49%) – are also the cohorts most likely to say they 'definitely agreed' with the view that there is a need for more courses and support for makers. This was significantly higher versus the proportion of the other three groups (Master Craftspeople, Established Professional Makers, and Occasional Makers) who 'definitely agreed' with this statement.

Historically, the Crafts Council have offered training courses in many of the topics tested in the makers' survey, and have experienced makers' reporting a need for this training, but then not necessarily taking advantage of it when it was available. We suggest this points to the need for additional research into this issue and the lack of take-up of Crafts Council training by makers. Potentially, those that most need training may not be aware of its existence.



No strong preferences on training duration and format

In the survey we asked makers to select their preferred training format, with options including half and full day workshops, conferences, mentoring and networking, long term face-to-face courses, online forums or seminars, and online courses. On average, across all makers, a full day workshop is most frequently selected (35%), followed second by online training courses (21%). By maker group, there are no significant changes as to the type of training wanted – suggesting there is scope to offer a range of training formats.

It is a slightly different picture when it came to asking when makers preferred to undertake training. Whilst Master Craftspeople are significantly more likely than any other group – or the maker average – to simply select ‘don’t have a preference’ (56%, versus the average of 48%), Established Professional Makers have the strongest preference for weekday training sessions (36% versus 31% maker average). In contrast, Early Career Professional Makers are significantly more likely to have selected evenings (21% versus 14% maker average). Again, this indicates there is scope to offer a variety of sessions across a range of day-types, in order to cater to the broadest possible proportion of makers.



Demo by Gail Mahon at Craft Fest 2013
© Simon Mills

8

Market models, intermediaries and the experience economy are shaping the market

The new intermediaries in the craft sector are deploying retail and merchandising principles to selling craft. The focus is not only on positioning craft as a high-quality competitor to art, design and fashion (for example through the use of showrooms), but also on building brands through providing makers with support on concept development, market focus and making work more collectable at the right price. The sustainability of the new craft intermediary models will be important for the future of the market for craft.

Face-to-face buying is still preferred over online purchasing

Informality and choice are factors that fuel the success of popular sales channels and new models for selling craft. By far the most popular places to make purchases of craft at all price levels continue to be craft fairs and craft markets. When asked to identify their preferred places to buy craft, craft fairs (19%) were the most commonly cited, followed by craft markets where makers often sell their own craft objects (14%) and direct from the maker (19%). All the online sources listed combined were preferred by (18%) of buyers. Mainstream Millennials show the strongest preference for buying online (35%), with Etsy (22%) being the dominant channel within this. Nevertheless, even amongst this digitally native sub-group, face-to-face buying is still preferred over online purchasing.

There has been a reported growth in the number of craft markets and craft fairs in recent years, from an expansion of stalls in farmers, Christmas and street food markets to an increase in more high-level events.

A strong and easily understood brand characterises the success of new craft events such as *London Craft Week*, *Great Northern Contemporary Craft Fair* and *Crafty Fox*, each pitched at different segments of the market, but each able to communicate clearly the quality and variety of work available, that helps build year on year growth and following.

Whereas a decade ago the approach to selling craft was to elevate it to that of art, to rarefy it and set it apart, now the approach of sales models is based on a confidence in craft's value amongst a new age of craft intermediaries. This approach is far more cognisant of the needs of both buyers and makers.

It was either two extremes, you either had the village craft fairs where work wasn't necessarily understood or celebrated and certainly not their value ... and on the other extreme you had quite stark white cubes for galleries.

You had to say, 'Applied art galleries,' you weren't allowed to say, 'Craft galleries,' I feel that that definitely changed.

The role of the intermediary is evolving

New models of selling craft have embraced market-focused principles used by the commercial retail sector such as the power of brand and the science of merchandising to position, present and sell craft in a way that makes it easier for people to understand, engage with and purchase.

The maker-focused approach means that new intermediaries are recognising that makers are often constrained from making a success of their business because they are makers rather than natural entrepreneurs. So, the new intermediaries fill in the gaps: providing a strong brand; marketing; photography; advice on creating collections, the colour to match the zeitgeist and pricing to maximise sales; access to trade buyers and commissioners and sometimes studio space, covering raw materials costs or enabling diversification through facilitating craft classes and courses.

For example, *The Designerie* at Bushmills in Northern Ireland is a shop, a showroom, workshop space and incubator for makers. Run as a social enterprise they identify makers and artists whose work they sell in their retail spaces. Work is displayed in home settings, alongside furniture, wall art and soft furnishings to help customers imagine it in their own homes. They provide some makers with studio space and with advice on how to make their collections saleable and collectible, using fashionable colours, covering a wider price range and complementing their work in domestic displays to make it more accessible and attractive.

The Designerie actively build and cultivate a local market and offer a pleasurable aesthetic, rather than a purely retail, experience. They also help customers get in touch with their own creativity, and understand that of others, by offering a programme of adult and kids' workshops. *The Designerie* can see that they are building a loyal buying audience and they are oversubscribed for makers who



aspire to be represented by them, but the business model is still fragile: they are not yet making a surplus; they are running out of space and need to raise funds for expansion; they should devote resources to their website and online platform but are struggling to prioritise this and money is always tight. They access grant support from Enterprise Causeway to provide mentoring and training courses for makers to increase their professionalism.

Another model is of an 'agent' for makers, where an organisation represents and nurtures a maker, supplementing makers' creative skills with the professional skills they so often lack or have little time for. They also provide a physical space for buyers to interact with the work; high quality photography; support with material and start-up costs; studio space, and match-making them not just with collectors and private buyers but also with interior designers and architects who seek to commission bespoke work. This model helps makers build up collections of their work, advise on the creation of iconic collectibles that can generate regular income streams, and facilitate the commissioning and sale of bespoke works.

Integrating the collections of a cross section of makers, working in all disciplines across art, craft and design, enables trade clients to take a holistic approach to their projects and commission or purchase multiple objects. The agent will manage any commissions on behalf of the maker. They also create collaborations between makers and luxury brands – asserting the role of individual skill and craftsmanship into popular commercial brands where this might not be overt to many customers.

An interior designer – they'll be spec'ing various aspects of the project at any one time. Usually there's the architectural aspects which are considered first, so, floors, walls, cladding. Then they'll start thinking about the placing of plugs, so that's when lighting comes in. Then it's furniture, because they're the biggest investment pieces. Then it's textiles, then usually décor and artworks. So, there is a pretty standard way in which an interior design project works, and we are always attempting to engage with the designer at different times... Then we can very confidently, and in a very tailored fashion, be suggesting and pitching work, or makers, or materials, or techniques that we think would really work and blend with that particular scheme.

The *Craft Design House* in Edinburgh works in a similar way – driven by a passion for design and craftsmanship, their aim is to promote makers in a new way: showcasing their skills and supplementing them with professional skills – acting as creative directors to bring makers to larger, more diverse and more lucrative markets, in this case corporate clients or those in the heritage or leisure sectors that commission collections for merchandising.

These new models have high expectations of their makers: consistent quality is paramount, productivity, self-discipline, entrepreneurial spirit and flexibility are vital.

Our ambition is that we marry creativity together with business.

These models recognise the importance of having an online presence but don't invest a great deal of confidence in making sales

through online channels. They feel that buyers want to see and interact with the objects and materials, imagine living with them and hear the stories associated with them and their makers.

Craft can't be seen necessarily always on a plinth, kind of, isolated. It needs to be seen where it was meant to be seen.

The emphasis on the physical interaction between customer, object, maker and intermediary is seen as a vital aspect of their business model with the purpose, not of elevating the craft in order to justify its cost, but of helping the client imagine living with it, using it and appreciating what has gone into the making of it.

Online platforms have clearly generated new sales models, particularly since the 2010 craft study. *Folksy* was established in 2008 and set out originally to provide an online sales channel for professional UK makers with the expectation that their clients would mainly be younger graduates who spent the majority of their time making. *Folksy* have strict criteria for makers, which is that work should be handmade in the UK, made or designed by the seller.

In the event, the people who wanted to sell through *Folksy* didn't reflect the assumed profile, instead they were mainly part time makers, largely older women, with second professions, making as a part-time activity, or in retirement, looking to make secondary or casual income from their work.

Folksy see plenty of scope for expanding their services into training for makers, craft markets and events. They do a limited amount of this mainly through partnerships as they

are very limited for resources (a team of three) and finance.

The popularity of craft experiences is the driver behind *Yodomo*, a relatively new player which had two founding aims: to address needs arising from the wellbeing movement and to help build sustainable crafts businesses by offering an opportunity for diversification. They provide online craft courses, kits and experiences both for people wanting to learn new skills and for people who just want to 'have a go'. Initially, as with *Folksy*, the expectation was to provide the service through established Professional Makers and Master Craftspeople, but this isn't the constituency who responded to this new opportunity.

(Three years ago) participation was not really very high on the agenda of people, and it felt a little bit like ... it devalued the value of the master craftsmen. But, now there's been a real shift and actually, suddenly participation has become a really important thing.

In recent years, the online or physical creative workshop has become an important income stream for many makers and *Yodomo* works to fill the gap in the market by providing a selection of workshops, through their website, which they produce. They curate the list of makers offering courses, specifically finding highly skilled craftspeople with unusual practice e.g. a Senegalese basket-maker; a shoemaker; a Polish maker inspired by folk art. They have to select makers rigorously to ensure that they have excellent presentation skills. Intermediaries also support makers to develop their skills to deliver training, to ensure a high quality experience as well as a high quality craft process.

Experience economy fuels interest in craft experiences

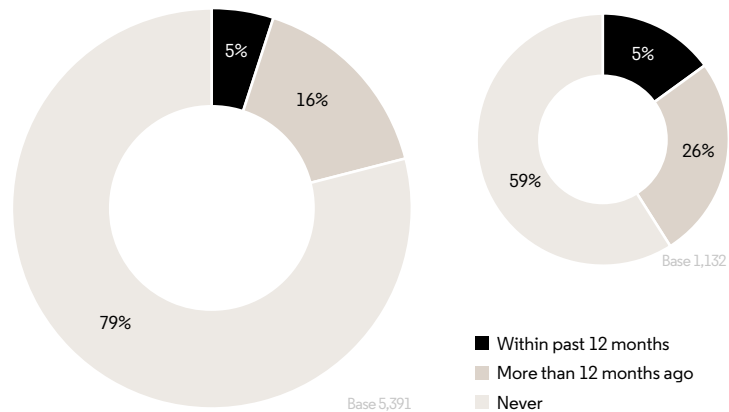
As identified by *Yodomo* and others, there is a high level of interest now in active participation in craft, either as an everyday pastime or through participation in workshops or classes.

In the population survey, one in five (21%) of the overall market for craft (buyers and potential buyers) has paid to take part in a craft class, workshop or course, with 5% (2.5m) having done so in the past 12 months with a further 16% (7.1m) having done so at some point in the past. Market sub-groups most likely to have attended a paid for class or workshop in the past 12 months were Mainstream Millennials (9%), Adventurers (13%) and Proto-collectors (18%).

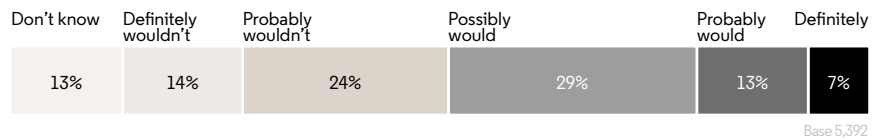
Of the 2.5m people who had attended a paid craft course in the past 12 months, an estimated 15% (367k people) had attended a residential course with Mainstream Millennials (28%) and Proto-collectors (28%) being significantly more likely to have done so.

There is an ongoing appetite for paid for craft experiences, with 20% of the overall market for craft (7% definitely and 13% probably) indicating that they'd pay to attend a craft workshop in the future.

Have paid to attend a craft class, workshop or course (left); spending one or more nights from home (right)



Propensity to pay to attend a craft class, workshop or course in the future



Market models, intermediaries and the experience economy are shaping the market

Makers have diversified into offering craft training and experiences and for some this has resulted in a change in the balance of their portfolio as well as providing an alternative source of income.

I teach one to one throwing lessons which are usually one-off classes. They are very successful and have proved to be a great present. I have up to three people visit me at a time so it's a social occasion as well as learning something new ... I find these an excellent source of income and I find them inspiring for my own work.

Workshops are a better income generator than product. I took the decision to concentrate on this and kit sales rather than production.

However, offering experiences to meet this demand often has logistical and philosophical challenges for makers.

As well as offering 'active' participation, some makers, due to the time commitment required for workshops, have diversified to providing potential buyers with behind the scenes tours to provide insight into the making process without being 'hands-on.'

We taught when we first set up, now we are too busy to offer this, we can't afford the time. We do offer workshop tours to every visitor which is key to converting customers into fans.

External trends and new retail models have opened up the market for makers

Whilst the earlier focus was on elevating craft in order to compete in the art market, the combination of recent trends, the internet and new retail have helped to open up the craft market.

These new models are shaped in response to an understanding of the needs of the market and of the needs of makers. It is important for these principles to take priority in all market development initiatives that help those new to the market engage more deeply with craft and develop a deeper interest in and appreciation of the work of makers. There is a need to build confidence and discernment and to encourage more risky, higher value purchases and commissions.

Makers report very similar training needs to that described in the 2006 and 2010 reports. They continue to need help with marketing, business development, international sales, social media, e-commerce and photography. From the feedback of the new intermediaries, makers also need help in honing their flexibility in new market environments and presentation skills.



9

Export potential: the market for UK craft in New York and Los Angeles

An important element of the market for craft is the potential for UK makers to export craft goods to other countries. The report explores one example of the potential export market in two major US cities – New York City and Los Angeles.

Data from the Department for Digital, Culture, Media and Sport (DCMS) on the export of goods from DCMS sub-sectors in 2016 showed that the value of craft exports worldwide was £4.6b – representing 17% of the total value of DCMS export of goods.

The key markets for UK craft by value in 2016 are shown in the table below:

Table 17
Export of Crafts by geography, DCMS 2016

Market	Value (£m)	% Total
Europe	2,110	46%
European Union	1,120	24%
France	656	14%
Switzerland	971	21%
US	517	11%
Gulf	768	17%

In 2016, the US was the third largest market for UK craft at an individual country level, accounting for £517m or 11% of total exports of UK craft, with only France and Switzerland recording higher sales. Based on the level of existing craft exports from the UK to the US and the potential for growth which its significantly higher population affords for developing the export market for UK craft, this part of the study focused on New York City and Los Angeles. The two

Metropolitan Statistical Areas (MSA) in New York and Los Angeles were selected to afford the opportunity to explore any potential differences in the levels of interest in buying UK craft between these two major East and West Coast cities.

Existing market of over 4m people for UK craft in New York and Los Angeles

The market for craft in New York and Los Angeles is significant – 84% of the adult population of New York (12.8m people) and 86% of the population of Los Angeles (8.8m people) have either bought craft in the past or would consider doing so.

As is the case in the UK in 2020, the market for craft in both cities is dominated by people who have already entered the market and bought craft – 10.7m (70%) in New York and 7.5m (73%) in Los Angeles. This market of buyers is also *actively* buying, with 7.4m people in New York (49%) and 5.1m (50%) in Los Angeles having bought craft from a living maker in the past two years.

There is also already a market for UK craft in both cities, with 2.5m people in New York and 1.7m in Los Angeles having bought craft in the past from a UK based maker. However, given the high numbers of craft buyers in both cities, these figures currently only represent a 23% penetration rate into the overall market of existing buyers of craft – leaving significant room for growth.

Nevertheless, this existing market for UK craft is an ‘active’ market, 1.7m people in New York and 1.1m in Los Angeles had bought craft from a UK based maker in the past two years.

This existing market for UK craft is also likely to be a *retained* market, with 2.2m people in New York and 1.4m people in Los Angeles who have bought UK craft in the past indicating that they’d definitely or probably buy craft from a UK based maker in the future. These figures represent retention rates of buyers of UK craft of 87% in New York and 81% in Los Angeles.

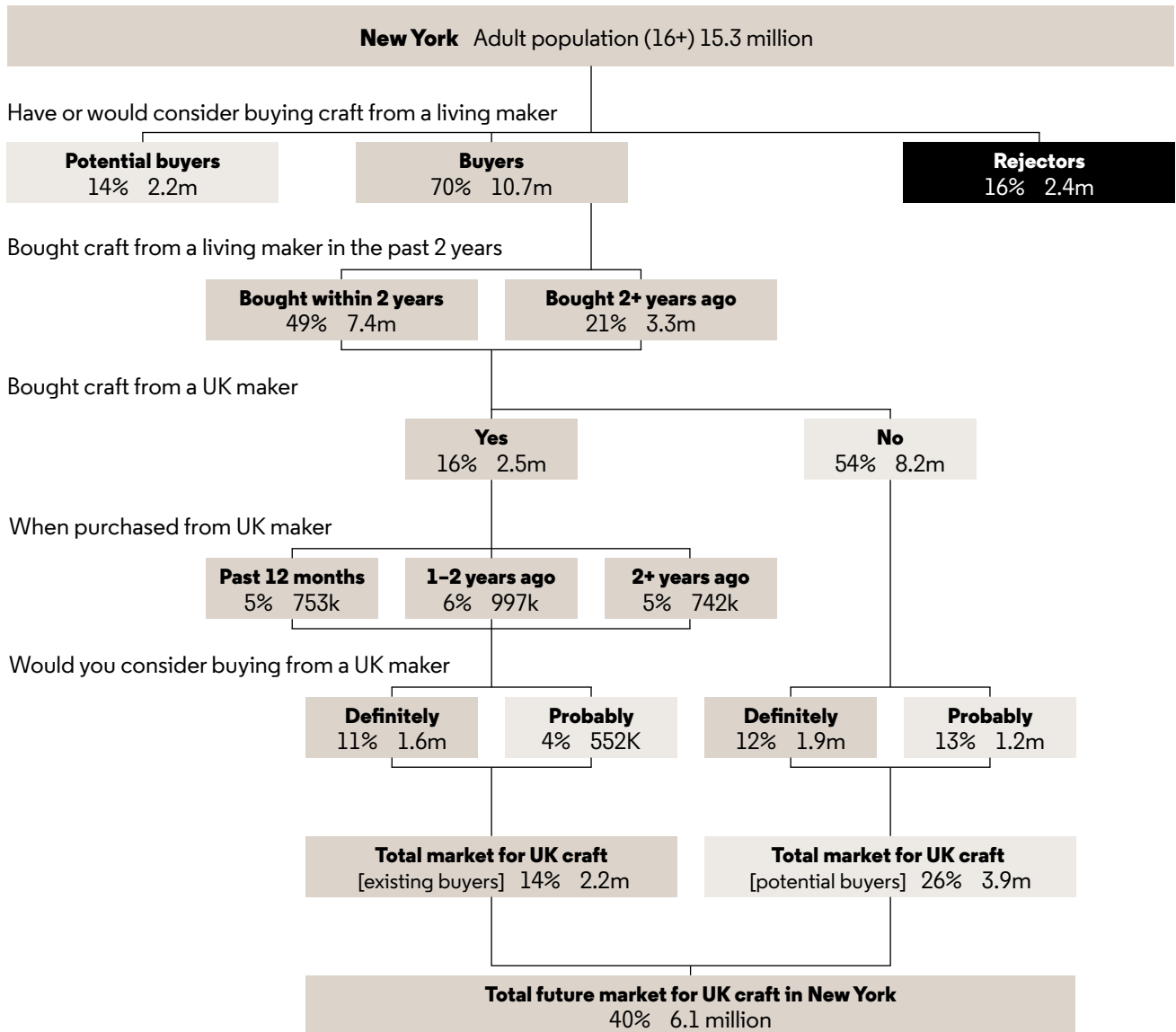
Potential future market of 10m people for UK craft in New York and Los Angeles

In addition to the existing market for UK craft, there is also currently an *untapped* market of 3.9m people in New York and 3.0m in Los Angeles who have bought craft from a living maker, are yet to buy from a UK based maker but would ‘definitely’ or ‘probably’ consider doing so in future.

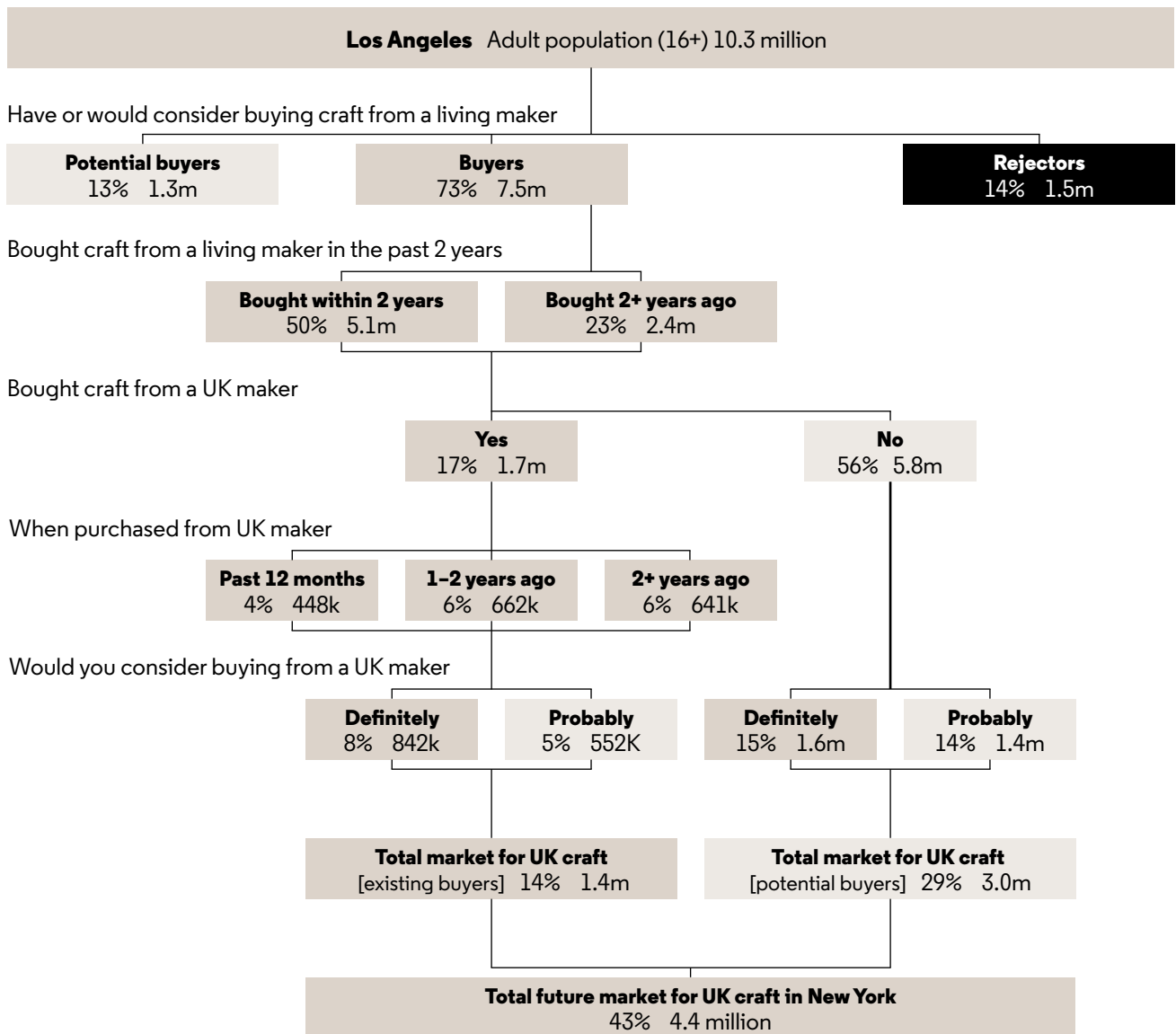
Combined, these *retained* and *untapped* markets for UK craft account for 9.6m people in the New York and Los Angeles Metropolitan Statistical Areas. The breakdown of the market for UK craft in the New York and Los Angeles populations, based on survey data, is shown in the following models.

Export potential: the market for UK craft in New York and Los Angeles

Market for UK craft in New York
(based on survey results)

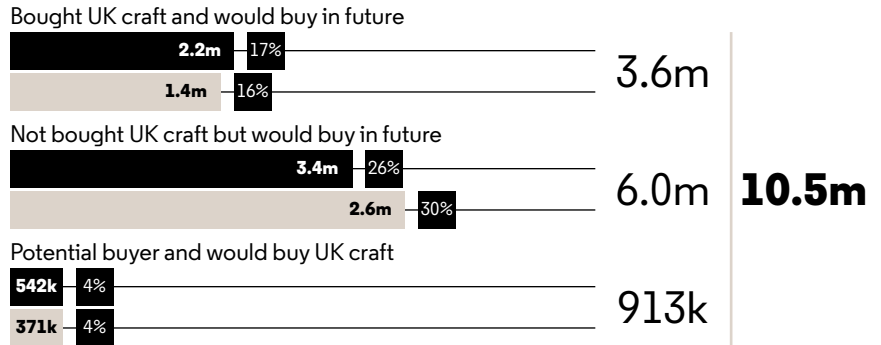


Market for UK craft in Los Angeles
(based on survey results)

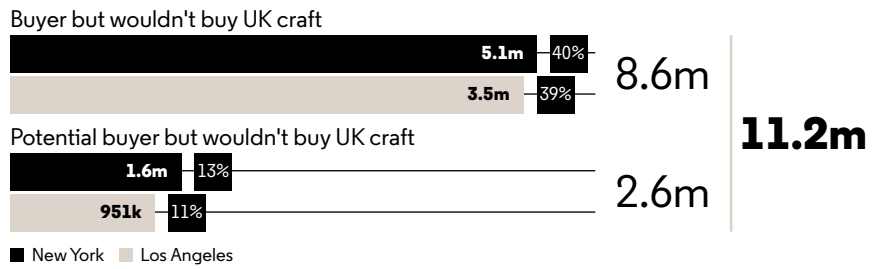


Export potential: the market for UK craft in New York and Los Angeles

Market for UK craft – as a proportion of the NY / LA metropolitan statistical area and real figure estimates



Resistant



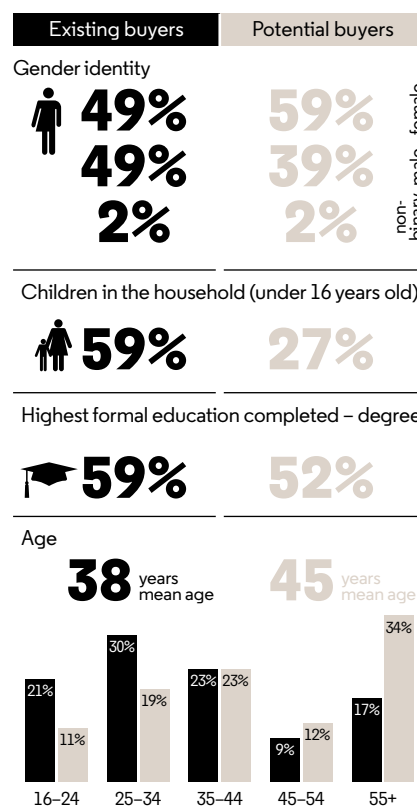
For those who have already bought UK craft, it is reasonable to assume that this cohort would be the most likely to buy UK craft in the future and thus represent the 'hottest' prospects for the UK craft market.

Existing market for UK craft is young, gender-balanced, ethnically diverse and highly educated

Market for UK craft – NY and LA profile

The existing market for UK craft in New York and Los Angeles is young – half (51%) are in the Millennial/ Gen Z (16 to 34 year old) age groups, with the existing market having an average age of 38. The potential market, whilst not as young (average age 45) still has more than half (53%) of people under the age of 45.

In contrast to the overall market for craft in the UK, where females are in the majority (55%), the existing market for UK craft in both New York and Los Angeles is more gender balanced in these highly cosmopolitan, urban locations. The potential market's gender profile is more in line with the UK, with females in the majority (58%).



Whilst the existing (37% non-white) and potential (29% non-white) markets for UK craft in New York and Los Angeles are more diverse than the market for craft in the UK, this is a reflection of the more diverse ethnic profile of the overall population in these cities, rather than a higher propensity amongst the non-white population to consider buying UK craft. The same impact is observed in the UK, where the market of craft buyers in London (28% BAME) is more diverse than elsewhere in the UK due to the high proportion of non-white ethnic groups in the London population.

The existing market for UK craft is highly educated (58% graduates) with both this and the potential market (52% graduates) being significantly more likely to be educated to degree level or above than those buyers who wouldn't buy UK craft (39% graduates).

Expression is the predominant Culture Segment in the existing buyer market

The majority (58%) of the existing market for UK craft in the US is in the Expression Culture Segment. Expression have a wide range of interests and hobbies, which often feature learning, community and creative pastimes. Expression enjoy activities that help them connect with and share experiences with others. They appreciate artistic or creative expression, so when they see an artist

at their craft, they really value that and also seek out activities which allow them to express their own creativity.

Expression also represent a third (32%) of the potential market for UK craft, though this cohort has a more diverse Culture Segment profile, with Stimulation (12%) and Essence (12%) being the most prevalent of the other segments.

Demo by Shannon McShane at
Craft Fest 2015 © Rory Moore



Existing and potential market for UK craft are active creative hobbyists

Those in the existing market for UK craft are creative – 91% have participated in a creative activity during their spare time in the past 12 months with a third (34%) doing textile crafts, a third (31%) doing wood crafts and one in five (22%) having done other craft activities such as calligraphy, pottery or jewellery making (see Appendices for UK comparisons). Almost half (45%) of this existing market have a declared hobby interest in craft. Whilst the potential market for UK craft is less likely to be actively engaged in creative hobbies, two

thirds (65%) of this market have still done some creative activity in their spare time in the past 12 months.

The existing market are also actively seeking to further develop their craft skills through participation in craft courses, classes and workshops with more than half (53%) having attended a class in the past 12 months. This active engagement and training are likely to impart to this group an insight and understanding of the making process – they recognise the time and skill required in making craft objects.

Existing and potential markets are willing to take risks when buying craft

The majority (58%) of the existing market for UK craft is prepared to take risks when buying craft and willing to invest in the work of less-known makers with a further 35% willing to take some limited risk in their craft buying. The potential market for UK craft, whilst wanting more reassurance has an equal split of risk takers (45%) and more cautious buyers (47%) – the latter limiting their perceived risk through buying work from makers whose work has been recommended to them.

The confidence in buying craft, evident in the existing market is in part due to the higher proportion of craft ‘vocationals’ in this market – one in eight (12%) has an academic or professional connection to craft. This cohort’s confidence in their buying is also backed up by their level of knowledge of craft with a quarter (26%) declaring a specialist knowledge of the discipline.

The existing market for UK craft is actively buying across a range of craft disciplines

The majority (86%) of the existing market for UK craft had bought at least one piece from a living maker in the past two years.

The existing market for UK craft buying is also wide-ranging in terms of the type of craft they buy. On average, this group has bought crafts from four of the seven different craft disciplines (listed in the survey) in the past two years.

The objects most commonly bought in the past two years by this existing market for UK craft were jewellery (75%), ceramics (74%), woodwork (68%) and glasswork (66%). 'Other craft' such as basketry or paper craft were the least commonly bought, but 45% of the existing market for UK craft had bought one or more 'Other craft' object in the past two years.

Whilst the potential market for UK craft was not as active in its buying habits as the existing market, nevertheless two thirds (67%) of this market had also bought craft from a living maker over a two-year period. For this potential market, the most commonly bought craft was similar to the existing market albeit with lower levels of purchasing. For this cohort, compared to the existing market, there was a more evident distinction between the most commonly bought (jewellery at 47%) and least commonly bought (metalwork at 14%) – their buying habits are more focused on one or two disciplines.

Existing and potential market for UK craft are highest spending cohorts

Across the overall market for craft (of any origin) in New York and Los Angeles, the existing and potential market for UK craft have spent more on average (\$180–285) on their most recent purchase and more on their highest ever craft purchase

(\$311–464) than buyers who said they wouldn't buy UK craft. This compares against a spend of £214 (approx. \$266)³⁵ for the most recent purchase of craft, and £280 (\$348) for the highest spend on craft by buyers in London.

Table 18

Average recent and highest spend on craft

Market	Recent spend	Highest spend
Existing buyers of UK craft	\$180	\$464
Potential buyers of UK craft	\$285	\$311
Rejector of UK craft	\$131	\$300

³⁵ www.xe.com/currencyconverter/convert/?Amount=280&From=GBP&To=USD

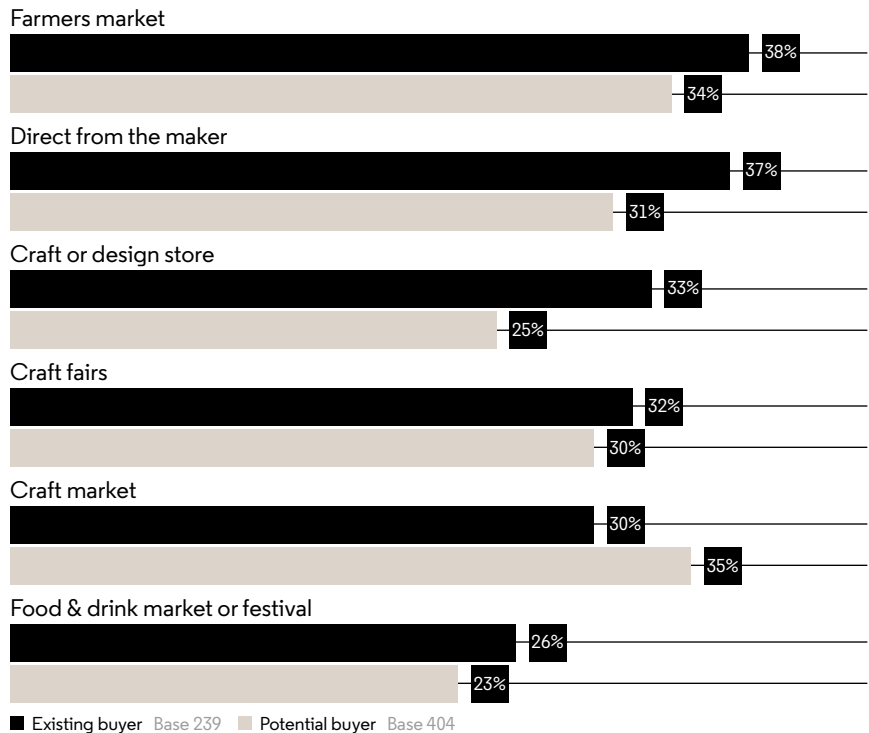
Farmers markets and craft markets are key face-to-face routes to buying but sources differ between New York and Los Angeles

Across New York and Los Angeles, farmers markets (38%) are the most commonly used face-to-face routes to buying amongst the existing market for UK craft. However, there are clear distinctions in buying behaviours amongst this cohort between New York and Los Angeles. In New York, craft and design stores are the most common face-to-face way of buying craft, with almost half (43%) of the existing market having bought crafts at these retail outlets. Craft fairs such as Renegade (36%), craft markets (32%) and pop-up craft or design stores (31%) were also common routes for face-to-face buying in New York.

In Los Angeles, farmers markets (51%) and craft or design stores (50%) were the most common face-to-face way of buying craft for existing buyers. Common across New York and Los Angeles is the propensity of this existing market to buy craft direct from the maker – 47% in Los Angeles and 35% in New York had bought craft direct from a maker.

Farmers markets and craft markets are also a key route to buying for potential buyers of UK craft in Los Angeles and New York, with more than half of the potential market in both cities having bought craft objects from farmers markets.

Top places where craft objects have been purchased in the past – by market group

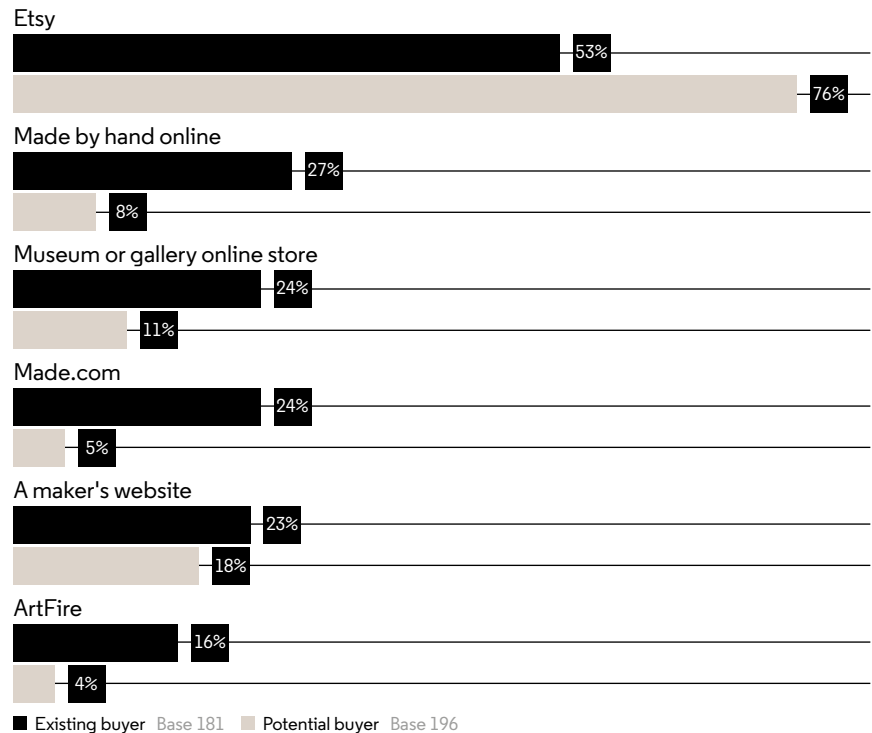


Etsy is the primary online marketplace for existing and potential buyers of UK craft

Existing buyers of UK craft are significantly more likely to have bought craft online (76%) than the potential market (48%), although there are no significant differences in their propensity to buy online in the future (91% and 87% respectively). Whilst *Etsy* is the most commonly used online marketplace for both existing (53%) and potential (76%) markets for UK craft, the existing market has bought craft from a much wider range of online sources than *Etsy*, with *Made by Hand* (27%) and *Made.com* (24%) being used by a quarter of this cohort alongside museum or gallery online shops (24%) and individual maker's websites (23%). One in ten of this existing market for UK craft who had bought craft online in the past had bought on *Folksy*.

Etsy (76%) dominates the potential market's buying channels with the second most commonly used online channel for this group being individual makers' websites' (18%).

Top online sites where craft objects have been purchased in the past – by market group



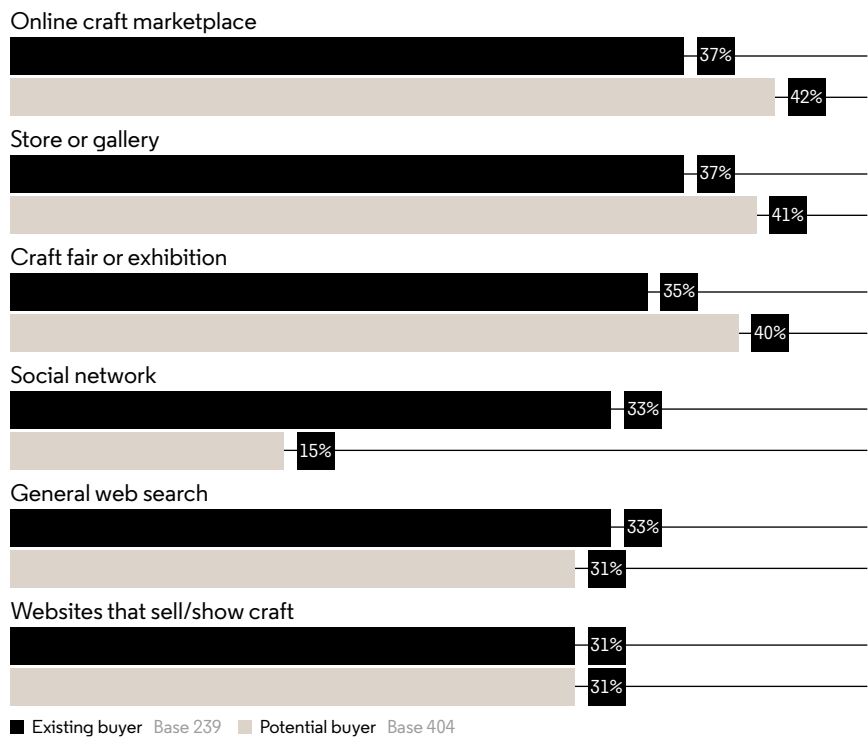
Online marketplaces are key sources when searching for crafts to buy but face-to-face browsing is as common

When thinking about or looking for craft objects to buy, both the existing and potential markets for UK craft are most likely to search online craft marketplaces (37% of existing buyers and 42% of potential buyers). Whilst behaviours for these two markets are common, in that around a third will also use general web searches or browse websites, the existing market (33%) is twice as likely to look to social media for recommendations on craft to buy.

In terms of browsing behaviours, there is a relatively equal balance for both existing and potential buyers between face-to-face and online browsing. Despite the ubiquity of digital sources and the ease of accessing craft to browse through these media, face-to-face browsing remains a common behaviour with around four in ten existing and potential buyers browsing crafts fairs, stores or galleries for craft to buy.

The behaviours for existing and potential buyers of UK craft in New York and Los Angeles are in contrast with buyers in the UK. Browsing face to face, at a craft fair (41%) or at a gallery shop or craft centre (38%) is much more common browsing behaviour than looking at online marketplaces (24%) or websites selling craft (21%).

Top ways of searching for handmade craft – by market group



Current and potential markets are active Instagrammers

The whole market for craft in the US is active on one or more social media platforms. However, there are significant differences in social media behaviours amongst the existing and potential buyers for UK craft. Six in ten of respondents in both these cohorts had been on *Instagram* in the past month, with seven in ten using *Facebook* and *YouTube*. Although similar in their social media behaviours, the existing market is much more likely

to use these channels to look for craft to buy. Given the increasing use of Instagram amongst makers to showcase their work, this channel in particular affords an opportunity for UK makers to engage buyers in the US. Existing and potential buyers of UK craft in New York and Los Angeles are significantly more likely to be on Instagram than UK buyers (38%); only the Gen Z Mainstream group in the UK (67%) are as active on Instagram.

Ethical consumerism to the fore for existing and potential buyers of UK craft

As was the case for both UK buyers and UK makers, existing and potential buyers of UK craft look to buy ethical or sustainably produced objects. Two thirds (65%) of the existing market and half (50%) of the potential market are mindful that the objects they

buy are sustainably produced. For existing buyers in particular, buying sustainably produced craft is even more important in New York and Los Angeles than in the UK, where 46% of buyers looked to buy ethical craft.



Demo by John Piekaar at Craft Fest
2015 © Rory Moore

Assurance over provenance is really important for current and potential buyers of UK craft

The majority (57%) of existing buyers and 39% of potential buyers would only buy craft if they are sure that the object was individually made. For existing buyers, this is significantly higher than for buyers in the UK (35%). The introduction of a 'kitemark' or similar is therefore potentially even more important when bringing UK craft objects to the US market. Alongside this, whilst

existing buyers are confident and happy to take risks in buying craft, almost half (45%) would want to take up professional or expert advice in buying. For two thirds (65%) of the existing market and half (48%) of the potential market, knowing about the maker and the ideas behind the work would make them more likely to buy. This compares against 44% for buyers in the UK.

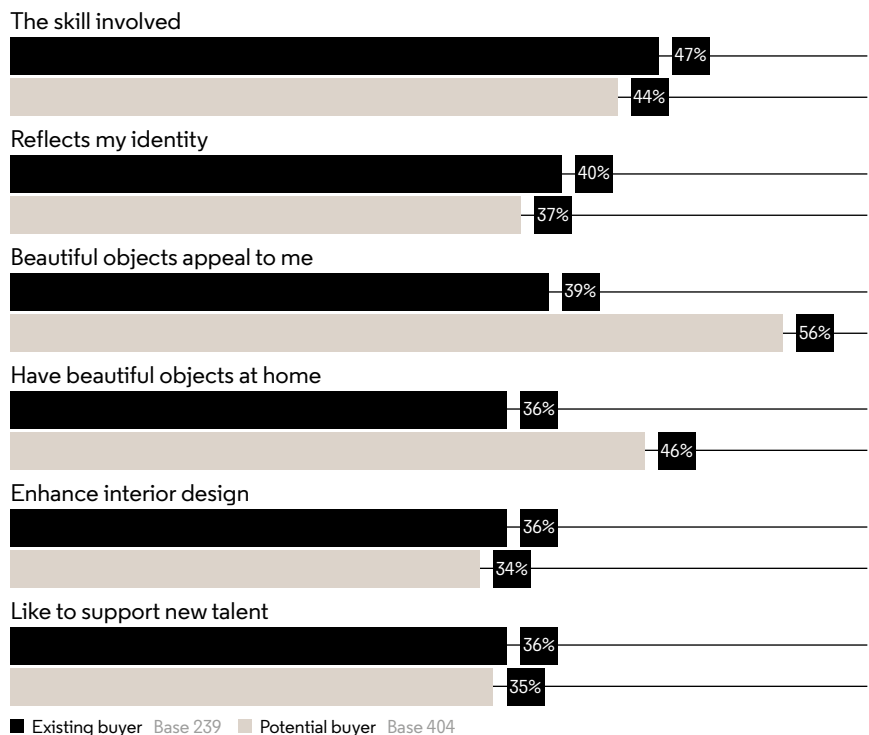
Motivations for buying are more maker-focused than in the UK

The existing and potential markets for UK craft in New York and Los Angeles are more likely to be maker-focused in their motivations for buying than their UK counterparts, although aesthetic motivations are also key drivers and in both territories the most frequently selected motivations were broadly the same, and ranked similarly.

The most commonly cited motivation for buying for the existing market for UK craft is the desire to keep craft

skills alive and the admiration of the human skill involved in making (47%). Given that this cohort are highly creative themselves, with many having also done craft classes and workshops, it is perhaps unsurprising that they are as focused on the skills and ideas behind the objects as they are in the objects themselves. They are also altruistic in their focus, more likely to buy craft in order to support new talent (36%) and to support makers (32%) than as a financial investment (19%).

Top reasons for buying handmade craft – by market group

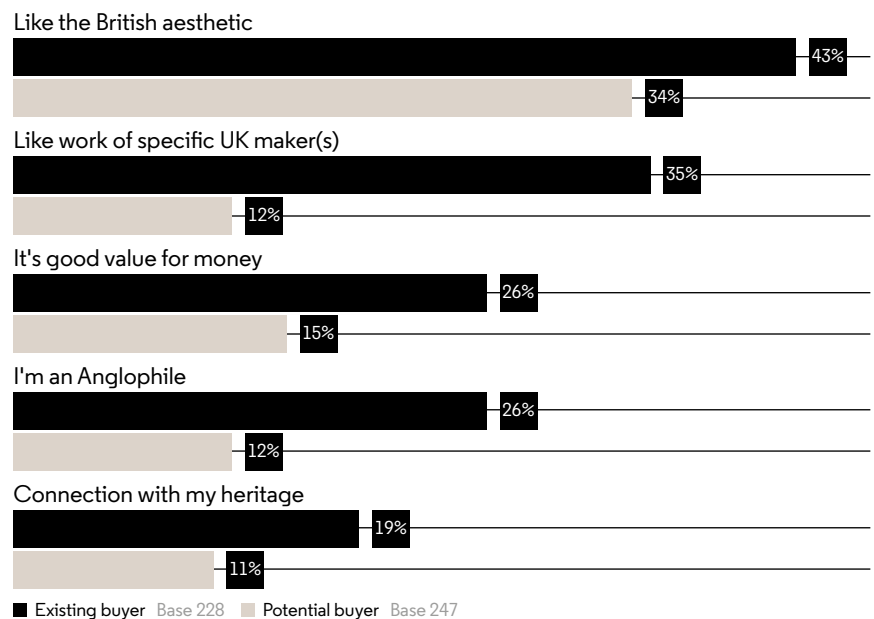


A British aesthetic or look is a key driver for buying UK craft

A British 'look' or aesthetic is the most commonly cited reason for buying UK craft for both existing (43%) and potential (34%) buyers. For those who have already bought UK craft, a third (35%) are already familiar with some UK makers and actively seeking their work. As many in the existing

market (particularly in New York) have a personal connection to the UK, having either been born here or have relatives or ancestors from the UK, a quarter (26%) buy craft from UK makers because it provides a sense of connection with their heritage.

Top reasons for buying handmade craft from a UK-based maker –by market group



Existing buyers are active and recent buyers, spent an average of \$260 on their most recent purchase from a UK maker

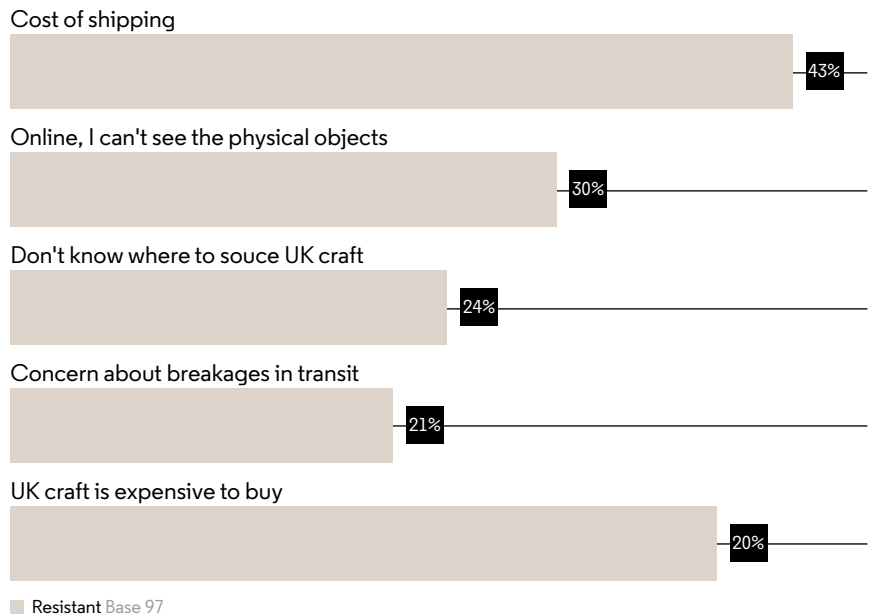
Three quarters (72%) of those who have bought UK craft have done so in the past two years. These existing buyers have bought an average of four craft objects from UK makers. In terms of the value of the craft bought from UK makers, the average spent on the most recent item of UK craft bought is \$260, compared with an overall average spend on all craft of \$180. The average highest spend on UK craft is almost \$400 (\$387).

Cost of shipping is the main barrier to buying UK craft

The additional cost which shipping adds to the purchase price of UK craft is the most commonly cited barrier for buyers in New York and Los Angeles. As face-to-face browsing is still important to buyers, a third (30%) wouldn't buy UK craft if it were only available for them to view online. There is also evidence that buyers in the US, as in the UK, need guidance

or signposting on where to source makers (UK based makers in the US context). As only a third of the most active existing buyers of UK craft are looking at work from a specific maker, the signposting resource for UK makers' work needs to be searchable on the look or aesthetic of the work, as well as 'named' makers.

Top reasons for not buying handmade craft from a UK-based maker – 'resistant' group only





10

Conclusions and Recommendations

Conclusions

The findings demonstrate how significantly the market for craft has grown, powered by favourable social trends and e-commerce. The groups fuelling that growth tend to be younger, less specialist interest, less affluent, mass market buyers consuming many more products but at a more modest level. Consumer preferences are in part prompted by growing interest in sustainability, provenance and supply chain integrity.

The market for high-end specialist work by Master Craftpersons and Established Makers has shrunk slightly. These high-end makers therefore remain concerned with issues identified in earlier research: how to help potential buyers understand the value and skill in their work in order to justify their price; and how to be found in a crowded market.

Meanwhile makers selling to a more mainstream audience are concerned with the impression of a saturated market and the problems of competing with high street stores and the instant gratification, ease and speed of fulfilment that customers get from the likes of Amazon.

There is, therefore, a need for the sector to focus efforts on the middle market of new consumer entrants and help them engage more deeply in craft, participate further, develop new knowledge of making and build their confidence in terms of what they like, purchase and collect.

The potential market for craft in two US cities points to a need for a co-ordinated UK-wide effort. This would ensure that resources are maximised to support export growth, and that the craft sector shares best practice and celebrates success in order to build on US demand for UK craft.

There are plenty of buying opportunities both physical and online. Whilst the public still prefers buying direct from makers and at craft fairs and craft markets, online channels are also widely used and are particularly important for attracting international sales and interest in makers and intermediaries. Digital platforms and social media are also driving an increase in participation and introducing craft to a wider audience seeking more craft experiences.

Differentiation within the market is therefore of importance to all makers: differentiating types of craft, individual makers and the work of individual makers should be a core element of initiatives to continue to grow the market for craft.

Recommendations

The report's findings confirm the significant growth in appreciation and consumption of UK craft in recent years. They point to the need for further interventions to help grow the market and to encourage existing buyers to engage more deeply, developing their knowledge, confidence and connoisseurship. Our recommendations therefore fall into two distinct areas which are intended to inform strategies for craft businesses and sector support to rebuild and develop the sector following Covid-19.

Sector support organisations

Develop coordinated strategies to grow the market, including to:

- ① Explore the feasibility of a kitemark to assure the quality of craft products, focusing on the differentiation and positioning of craft, to encourage deeper engagement from buyers.
- ② Invest in digital platforms and audience growth in order to continue to promote makers and their work to new audiences.
- ③ With the shifting profile of craft buyers to a far younger demographic, explore the benefit of expanding credit mechanisms such as Own Art to a greater number of craft galleries and retailers.
- ④ Review sector training offer, focusing on digital marketing and e-commerce expertise for makers to help professionalise and boost marketing capabilities and to bring more product to market.
- ⑤ Research models and pricing within the experience economy and its growth potential for craft makers as a sustainable revenue stream.

Governments and
sector support
organisations

- ⑥ Develop research and initiatives to support the sector in making craft an inclusive space for all participants.
- ⑦ Undertake further research on the needs and challenges facing craft intermediaries (retailers, galleries, markets, fairs) in order to make policy recommendations on how to ensure their sustainability and growth.
- ⑧ Create a UK-wide export programme, building on the potential in the US market.
- ⑨ Ensure that any creative industries business support packages accommodate the specific needs of the craft sector and include a study of innovative success factors, new approaches, best practice and innovation in adjacent markets.



Demo by Sandra Robinson at
Craft Fest 2013 © Simon Mills

11

Appendices: Culture Segment Pen Portraits

Expression

RECEPTIVE, COMMUNITY, NURTURING, GENEROUS, COMMITTED

Expression are 'yes' people. They're full of enthusiasm with varied and eclectic cultural tastes. They're in tune with their creative side, are fun-loving and see arts and crafts as a way of broadening horizons.

They enjoy activities that help them connect with and share experiences with others. They are community-minded, and, as such, put a high price on inclusivity. They like to be sure that everyone is welcome to enjoy the benefits of engaging.

Capturing their attention

Expression don't like being 'marketed to': they want to be inside, and part of, the conversation. They don't want to be advertised to, it feels impersonal.

Help them create an emotional, personal connection with makers – more like a friend. Marketing needs to actively demonstrate a desire to welcome the widest possible audience to participate in craft and events.

Where to find them

Often don't feel they receive enough information about what's going on.

They tend to take note of things they see advertised when out and about. Expression will engage with local area Facebook groups. Radio is particularly popular – especially local stations.

Their newspaper readership (including print editions) is higher than average, and they have above average readership of magazines, including TV listings and Home magazines.

Building relationships

Expression have a very strong sense of civic responsibility, with natural built in pre-dispositions to support non-profit organisations. Craft organisations who are doing something that promotes egalitarianism, access and democracy command more of their support.

Expression is the segment most likely to say nice things about you, to join, to donate, to volunteer. There may be a

personal motivation, but it's also their duty; they're people who put their hands up for things. They feed off the social nature of such interactions, meeting other volunteers and the people they're helping. They're network people and want to be part of something bigger.

CRAFT ATTITUDES AND PRIORITIES

Personal/local connection to maker
Collecting
Trustworthy & authentic
Intimate experience

TOPTIP

Expression are often visually driven. Makers should ensure marketing has beautiful, natural images. Being people people, they also like to see close up faces of makers and artists.

Messaging should focus on...

- Debates and discussion
- Building networks that appeal to their community spirit
- Highlighting the opportunities for participation

It is nice to support the local craft-making community. A lot of love and care go into their beautiful objects.

Stimulation

ACTIVE, EXPERIMENTAL, IDEAS, SOCIAL, NEW

Stimulation are an active group who love adventure. They are all about big ideas and are looking for craft and craft experiences that are 'out of the ordinary'. But they will also attend events, such as craft fairs and markets, for the social experience.

Stimulation are independently-minded. They are happy to stand out from the crowd if it shows them to be ahead of the curve. They aren't drawn to the very mainstream as they like to be the ones making the discoveries.

Capturing their attention

Stimulation enjoy marketing as an artform in its own right. If it's clever, or beautiful, or visual, they'll viral it to everyone. But if it's lame, they'll also viral it to everyone. Marketing needs to highlight the thing that makes it incredible and different. But no spoilers please – don't give too much away. Intrigue them and spark their interest, but the "reveal" should happen during their craft interaction or experience.

Where to find them

Have high digital engagement, making them easy to engage online. Stimulation are typically very active on all social media.

They will pick up free print publications and listings magazines.

Their radio listening is average, but they take note of coverage relating to what's on.

Stimulation tend to pay attention to outdoor advertising, particularly posters and billboards on transport networks.

Building relationships

This segment typically has a slightly lower attention threshold and can be distracted by something newer or shinier on the horizon. However, brands they identify as keeping things interesting can develop relationships with this segment. Membership that doubles as a pass into new and extraordinary experiences may increase the loyalty of an otherwise promiscuous segment. Makers that regularly produce new, exciting or alternative designs and pieces will keep their attention.

Stimulation like to meet the maker and know the story behind the object and the design process, facilitate this to keep them engaged. They more likely than most of the other Culture Segments to identify as having specialist knowledge of craft, although they are most likely to have a social or leisure-related connection to craft.

CRAFT ATTITUDES AND PRIORITIES

Craft attitudes and priorities

Unique, beautiful pieces

Appreciate skill & quality

Supporting makers/ a chance to meet the designer

TOPTIP

Stimulation will associate with brands and activities that align with their own self-image. Well aware of how they're perceived by others, craft experiences can be great conversation starters and reflect well on them. their early adopter nature also means they make good brand ambassadors.

I love sellers who are so passionate about their crafts that they turn it into a business. Buying from craft fairs and Etsy makes me confident I'm buying a quality item from a passionate seller.

Essence

DISCERNING, CONFIDENT, INDEPENDENT, ARTS-ESSENTIAL

Essence consider the arts and culture essential to their very being. Culture is a way of exploring the world and reflecting on meaning, as well as providing deeply emotional connections.

High-quality workmanship is their primary concern. They're therefore confident and knowledgeable and don't see popularity as a signifier of quality, so they can be dismissive of craft and design they see to be too mainstream or unsophisticated.

Capturing their attention

Essence view marketing as for other people who need it more than they do. They are far less likely than the other segments to read marketing copy, so extended prose for their benefit could be a wasted effort.

They're fiercely independent; they almost make a virtue out of not being influenced.

Where to find them

Essence proactively keep up to date with what's going on in the craft world. Typically, they report the highest use of venues' websites, and they also listen to the radio and read newspapers - they like to feel informed.

They favour 'infotainment' over pure entertainment - they're less likely to read tabloids.

Building relationships

Essence are not acquiescent or natural joiners. If they do join a scheme it will often be to overcome a paygate between them and what they need e.g. early access to collections or booking craft experiences. Essence have a singular agenda.

That's not to say they can't develop affinity and connection. They are also believers in the important societal role craft and makers play. They think it's important to allow access to many different kinds of artistic expressions and to all its citizens and this will include involving the community in creative

CRAFT ATTITUDES AND PRIORITIES

Quality & provenance

Authenticity

Interacting with makers

Sense of personal connection

TOPTIP

They have a low tolerance for amateur arts for their own consumption, favouring quality of process and substantial content and rigour. The principal way they would bond with makers is via access to the artist, privileged access to information, and to booking.

Messaging should focus on...

- Highlighting quality and sophistication
- Acknowledging their discerning knowledge and interest
- Presenting opportunities for taste development and challenge

I like to meet the maker. I can request custom orders, and I know the item will be authentic, trustworthy and high quality.

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