Craft SCOTLAND

State of the Sector Report

March 2017

State of the Sector Report
prepared by Dr Joanna Bletcher

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Contents

List of Figures

List of Tables

Foreword

As part of our role to provide leadership within the craft sector, Craft Scotland has devised a new *State of the Sector* survey, distributed in February 2017. The last major piece of research examining the craft sector in the UK was *Craft in an Age of Change* (CiAC)(2012) commissioned in 2011 by the Crafts Council, Creative Scotland, Arts Council of Wales and Craft Northern Ireland. Covering all four nations of the UK, CiAC examined the profile of craft businesses, and considered how craft as a sector was changing. Using data referring to business practice across 2010, CiAC included a literature review, focus groups, interviews with experts, a steering group, and a large phone survey of over 2,000 makers, retailers, educators and curators. Five years on from the published report, it is necessary to re-examine the craft sector in Scotland, to investigate what changes, if any, have occurred, and what new needs the sector now has.

The *State of the Sector* survey is a more modest piece of work, consisting of a single survey sent out to approximately 300 makers and craft professionals in the Craft Scotland network (targeting those working in craft-related activities at a professional level rather than hobbyists). It received 109 responses from makers across the country (in comparison to the 361 Scottish makers responding to CiAC). The aim is to develop a small-scale tracking study, rather than a fully comprehensive large-scale survey, which would require significantly greater investment and resourcing. With smaller numbers, it is not wise to make generalisations, however this smaller study can be deployed and developed year on year to begin the vital task of tracking trends across different aspects of the craft sector. Some of the questions involved directly relate to those in CiAC, in order to gauge any significant shifts relating to key indicators such as: income, forms of practice, selling channels and export capacity. Other elements such as makers' engagement with Craft Scotland and opportunities to develop new programmes responding to sector needs are also considered.

This report brings together analysis of the survey results, and where possible compares the results to CiAC. The 2017 survey asks respondents to refer to their financial figures and experience from financial year 2015/16. Part A includes the main survey results. The Executive Summary (Section 1), notes key themes and areas of interest arising from the results of the analysis. The responses from survey questions 1-20 are then explored individually (Section 2), and a brief discussion explores the numbers in more detail. This aims to offer insight into changes in the sector, and to act as a resource for policy organisations, makers, and other craft professionals, that can be built upon with each annual study. Part B of the report explores the findings that relate directly to how makers interact with Craft Scotland, and how they feel they are supported by the organisation. This includes a brief summary (Section 1), and the individual responses from questions 21-25 (Section 2).

Craft Scotland would like to thank Leah Black and Maggie Page at Creative Scotland for their support in compiling the survey. Thanks go to Dr Joanna Bletcher for compiling this report and her analysis of the results and to everyone who participated in the survey. We appreciate you giving their time to support this initiative which we hope will provide new opportunities to support continued development within the craft sector in Scotland.

Fiona Logue, Director, Craft Scotland, April 2017

Part A: Main Survey Results

Section 1: Executive Summary

The overall findings of the research remain quite similar to those reported in *Craft in an Age of Change* (CiAC). Businesses are small-scale, widely distributed across Scotland and reasonably well-established, with few employing other people. Craft businesses often comprise several activities including the making and selling of objects, and profits remain modest. Portfolio working therefore dominates, which may be unsurprising given the challenging economic times in the years since 2010. Export sales remain low and makers require advice and support in how to successfully grow and change their business to respond to uncertainty, particularly in 2017 with the possibility of leaving the European Union imminent. Nevertheless, attitudes remain positive overall, and new makers still appear to be joining the sector. The analysis of the survey data has identified a few areas that may warrant focus in subsequent surveys. These are outlined individually below.

<u>Demographics</u>

The gender balance remains dominated by women, and 54.1% of respondents were also between 35-54 years of age, which is roughly consistent with the figures reported in CiAC. The survey reached makers at all stages of their career, with 48.1% working professionally as a maker for over 10 years. However, 33% of respondents were relative newcomers, working professionally for under 5 years. These are new makers since the CiAC survey, perhaps reflecting some buoyancy in the sector.

<u>Field of practice and social media</u>

Jewellery remains the most common field of practice, with textiles and ceramics also popular areas. The strength of jewellery and textiles is not necessarily surprising, given the quality of educational courses within Scotland in both of these domains, and Scotland's heritage in textiles continuing to make this a popular choice for both independent and industrial working. The popularity of ceramics is less obvious, although the majority of those responding were well-established makers (over 10 years). New businesses (0-5 years) were located mainly in rural areas, and practiced by those aged 35 or over, suggesting a career shift or an activity that perhaps supplements other income. Another possible reason for shifts in the popularity of fields such as ceramics might be a general 'craft revival' (Rawsthorn, 2015) in the past few years, as a result of a reaction to the rise of digital technology, a shift in lifestyle choices and the need to diversify income streams to navigate continued economic challenges.

The interesting paradox of the digital rise is that whilst people turn from the always online nature of digital life, the capacity of social media tools allows exposure to new audiences as never before. This 2017 survey reported 36% of respondents using social media channels for selling craft objects, a steep rise from 5% in CiAC. Due to the limited numbers of this survey it is not wise to make generalisations; however, given the proliferation of various platforms compared to 2010, it is likely that there will be continued growth in the use of these channels. This presents makers with opportunities for new income streams, and presents Craft Scotland with an opportunity to provide support for the many makers in Scotland who may find navigating this digital world challenging.

Income

41.4% of respondents reported turnover of £10,000 or less for financial year 2015/16, compared with 72.5% in 2010 (CiAC). This is most likely due to the sample surveyed rather than a significant rise in turnover. Combined figures for 2015/16 show 83.9% reporting £30,000 or less, which is similar to the overall figure of 87.5% in 2010. Generally speaking, craft remains an activity with modest earning potential.

In this recent survey, there is a higher percentage of non-craft related income reported (62.6% in 2015/16 vs 49.3% in 2010). Informal and other forms of teaching remain popular options for supplementing the making and selling of craft objects, along with other forms of part time work. Portfolio working is still the norm, with many makers reporting up to three or four activities (craft or non-craft related) that make up total income.

In terms of profit, figures remain low overall. Fewer makers report profits under £5,000 in this survey than CiAC (60.5% in 2015/16 vs 70.2% in 2010), but due to the numbers surveyed this cannot be seen as statistically significant. 16.7% report negative or no profit for the 2015/16 financial year, which ranges across businesses of all stages and sizes.

Export sales appear to have risen for the sample surveyed in 2017 (54% up from 27.4% in the 2010 CiAC report). The percentages for export do remain modest however. Craft Scotland have actively developed several international exhibiting and selling opportunities in the past few years (e.g. ACC Baltimore, SOFA Chicago), and these opportunities may well have contributed to this rise in export sales. Anecdotal evidence gathered by Craft Scotland also suggests that export sales via makers' own online channels may have risen in recent years, and so there is clearly further opportunity here to support makers with this aspect of business development. Exporting internationally is therefore still an avenue that could benefit from further focus in the Scottish craft sector.

Positivity in the sector

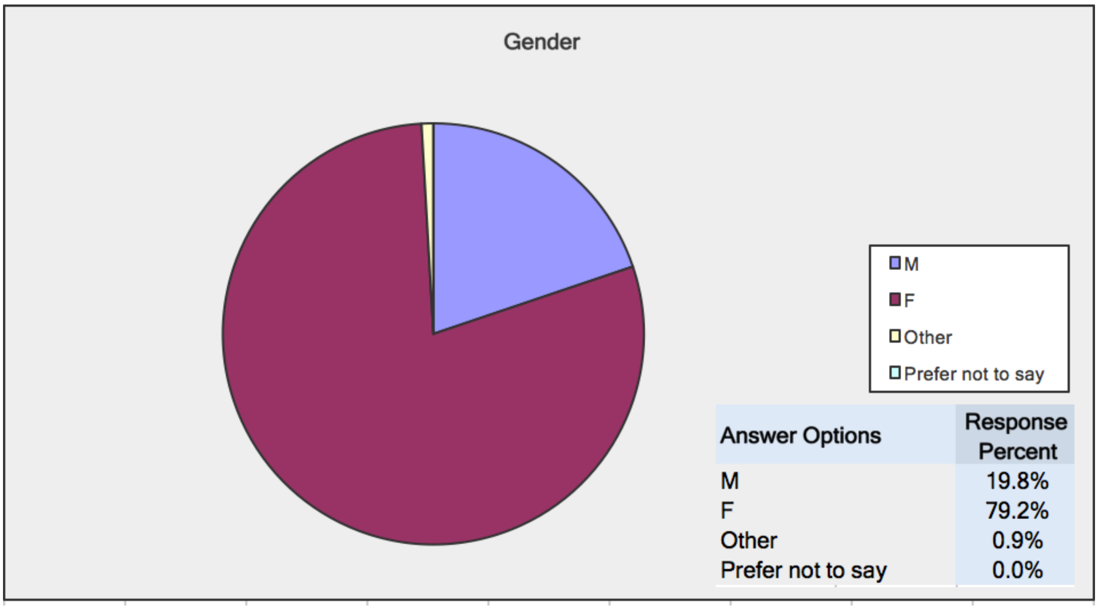
Despite low turnover and minimal profits, there is a generally positive feeling to sustaining business over the next twelve months. This seems to be an attitude rather than connected directly to business success, and perhaps a sense of value in craft as a satisfying career option. Scottish makers were also the most positive in the CiAC report. In future surveys it may be worth digging a bit deeper into the reasons for this positivity, to identify its drivers, and consider what else can be done to capitalise on this for sustaining the sector.

Section 2 below outlines the responses to the survey for each question posed and offers some discussion of these results.

Section 2: Survey results and discussion (Q1-20)

Q1: Gender

The survey confirms the larger female percentage that was established in the CiAC report in 2011, although for the sample in this survey this has increased, with 79.2% identifying as female (previously 68.4%), 19.8% as male (previously 31%) and 0.9% identifying as Other (Figure 1). This could be due to the nature of this particular sample of respondents and so perhaps should not be seen as a significant increase, although tracking this further in the next few years will reveal any changes. Nevertheless, the gender balance in the craft sector remains dominated by women.

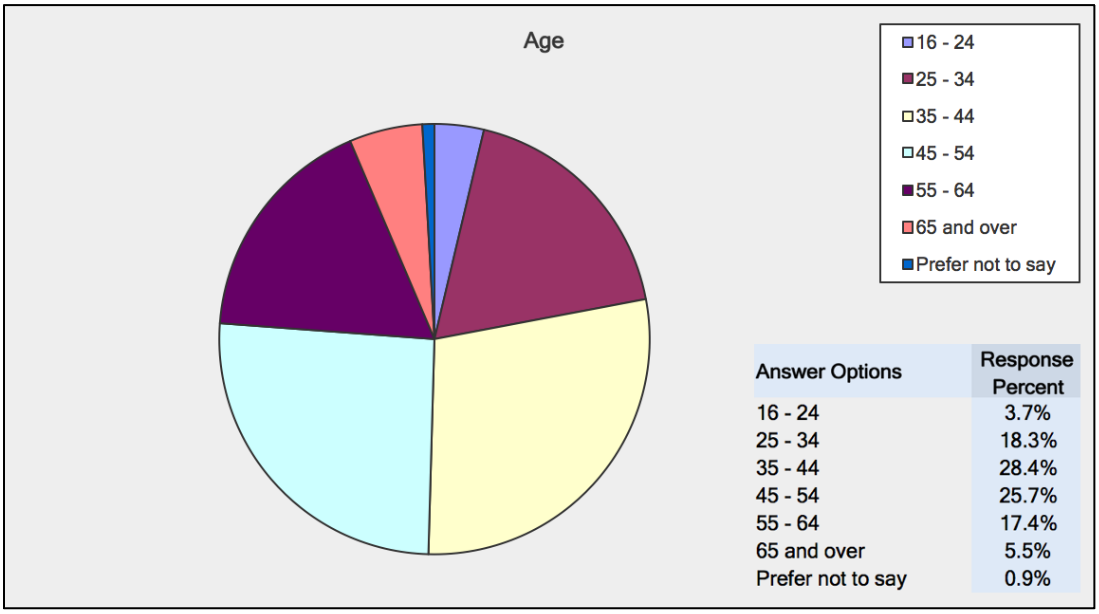


Answer Options	Response Percent
M	19.8%
F	79.2%
Other	0.9%
Prefer not to say	0.0%

Figure 1: Collated gender chart (106 respondents)

Q2: Age

The majority (54.1%) of respondents to the survey were aged in the combined range of 35-54. This is roughly consistent with the CiAC average (for Scotland) of 45.4 years. There were also healthy responses from those aged 25-34 (18.3%) and 55-64 (17.4%).



Answer Options	Response Percent
16 - 24	3.7%
25 - 34	18.3%
35 - 44	28.4%
45 - 54	25.7%
55 - 64	17.4%
65 and over	5.5%
Prefer not to say	0.9%

Figure 2: Collated age chart (109 respondents)

Q3: Location

The study reached 109 craft makers and business from almost all local authority areas, with the highest concentration of respondents from Edinburgh (17), Glasgow (15), Fife (11), the Highlands (10), and Dumfries and Galloway (9) (See Figure 3 and Table 1 below for the breakdown of locations). The concentration in the central belt areas is perhaps to be expected, but the proliferation across the country speaks to the capacity of small craft businesses to operate in almost any location, particularly those more rural areas where self-employment might be seen as a particularly viable option. The rise of online distribution and sales may be one factor supporting the rural business, and the CiAC report did note makers in Scotland to be more likely than their UK counterparts to be using internet selling channels. However, the survey relies on a self-selection of response and so does not necessarily cover all locations of makers across Scotland accurately.

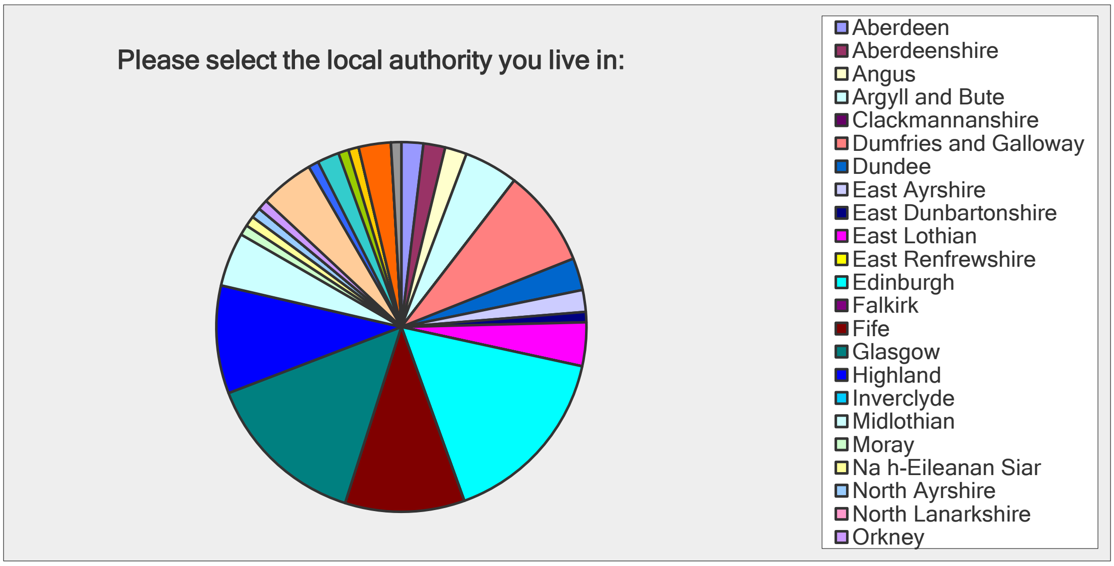


Figure 3: Location of respondents based on local authority (106 respondents)

Answer Options	Response Percent
Aberdeen	1.9%
Aberdeenshire	1.9%
Angus	1.9%
Argyll and Bute	4.7%
Clackmannanshire	0.0%
Dumfries and Galloway	8.5%
Dundee	2.8%
East Ayrshire	1.9%
East Dunbartonshire	0.9%
East Lothian	3.8%
East Renfrewshire	0.0%
Edinburgh	16.0%
Falkirk	0.0%
Fife	10.4%
Glasgow	14.2%
Highland	9.4%
Inverclyde	0.0%
Midlothian	4.7%

Moray	0.9%
Na h-Eileanan Siar	0.9%
North Ayrshire	0.9%
North Lanarkshire	0.0%
Orkney	0.9%
Perth and Kinross	4.7%
Renfrewshire	0.9%
Scottish Borders	1.9%
Shetland	0.9%
South Ayrshire	0.9%
South Lanarkshire	0.0%
Stirling	2.8%
West Dunbartonshire	0.0%
West Lothian	0.9%

Table 1: Location of respondents based on local authority (106 respondents)

Q4: Field of Practice

The five most common fields of practice were (multiple responses allowed) (See Table 2 below for all fields available):

Jewellery	32.4%
Textiles - various (excl. weaving)	28.6%
Ceramics	24.8%
Silver	14.3%
Other metal (excl. jewellery & silver)	11.4%

Answer Options	Response Percent
Jewellery	32.4%
Silver	14.3%
Other metal (excluding jewellery and silver)	11.4%
Ceramics	24.8%
Textiles: knitting	6.7%
Textiles: sewing and embroidery	12.4%
Textiles: weaving	5.7%
Textiles: print	9.5%
Leather	1.9%
Wood (excluding furniture)	6.7%
Furniture	5.7%
Stone	0.0%
Glass	6.7%
Graphic craft (including calligraphy, sign writing and bookbinding)	1.9%
Paper (excluding graphic craft)	4.8%
Synthetic materials (including plastics)	1.9%
Digital	1.0%
Mixed media	6.7%
Millinery	1.9%
Fashion	7.6%
Mosaic	1.9%

Table 2: Field of practice (multiple responses allowed) (105 respondents)

The highest result of jewellery as a field of practice mirrors the results in CiAC, although in 2017 the percentage of respondents naming jewellery is higher – a rise from 23% to 32.4%. An increased strength in the sector and the perceived lack of support beyond Higher Education led to the development of initiatives such as Vanilla Ink in 2012 and Scottish Jewellery Week in 2014, which in turn may have had some impact on this growth. The annual Elements gold and silver festival in Edinburgh, established by the Incorporation of Goldsmiths and held at Lyon and Turnbull Auctioneers, also speaks of the high-quality of Scottish jewellery and silver practice, and may be a contributing factor in this rise of numbers. However, with the closure of established Further Education (FE) courses (Glasgow Clyde College in particular) and the merging of FE institutions within the last few years, it remains to be seen if this growth will continue.

Ceramics and textiles also see an increase since the 2011 CiAC survey. Again, this may be related to the particularity of respondents. For ceramics, given the lack of established training courses and educational programmes, it is interesting that there appears to be a rise. Of the 26 respondents using ceramics, the majority of businesses have been established for over 10 years (17), however five businesses have been running for less than five years, with a further four running for between five and 10 years, which may not have been captured during the previous survey. All respondents in the 0-5 year category are aged 35 or over, and all are based in rural areas (Highland, 2; Argyll and Bute, 3; Fife, 1) suggesting this may be a shift in career that currently supplements or is supplemented by other activity.

However, perhaps the popularity of ceramics is also indicative of a wider crafts revival, with the popularity of programmes such as the Great Pottery Throwdown (BBC) being notable additions to the wider interest in handcrafted skills. As design critic Alice Rawsthorn commented in 2015:

> The craft revival, which is also manifested commercially in the appearance of "craft beer" and "craft bakeries," is partly a reaction to the ubiquity of digital technology. As the American sociologist Richard Sennett argued in his 2008 book "The Craftsman," spending so much time staring at screens has made spontaneity and authenticity seem more desirable, fuelling the popularity of live collective events like festivals, talks and debates, as well as creative activities such as baking, knitting, gardening and pottery. These trends have accelerated since the book's publication (Rawsthorn, 2015).

Writer Tim McKeough (2015) also notes:

> We want to know where our free-range eggs come from, and where our coffee beans are grown and roasted. We also want the vessels we use to consume those things to embody a deeper story about craftsmanship and creativity (McKeough, 2015).

The general decline of crafts courses across the UK and the rise of DIY and the maker movement has perhaps also induced a desire to keep craft practice alive on an individual level. It will be interesting to see if this is a trend that continues, supported by more grassroots development and informal education options beyond Further and Higher Education.

Q5: How long have you been working professionally as a maker?

Almost half of those surveyed have been working professionally as a maker for 10 or more years (48.1%), but there are also a healthy number of newer makers who have been working professionally for under five years so far (33%, see Figure 4). This reflects a sense of optimism in the sector that is also noted in the survey, both for those who continue to build their business, and for those who are still within the early years of development.

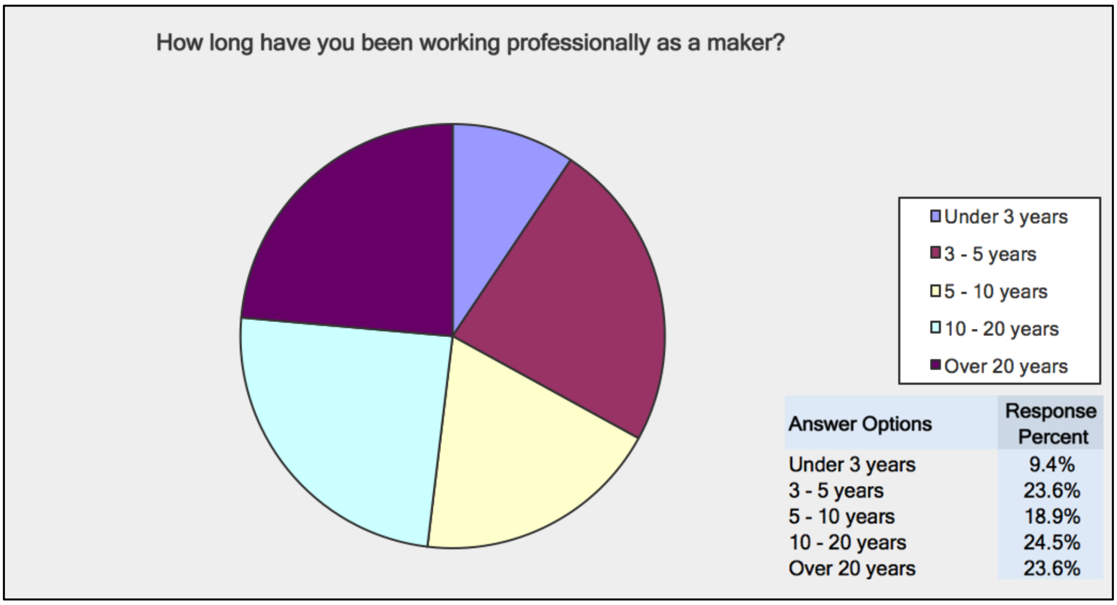


Figure 4: Length of time working professionally as a maker (106 respondents)

Q6: Are you registered for VAT?

Overwhelmingly craft makers in Scotland are not registered for VAT (94.9%). The lower level of earnings means that the thresholds for VAT are too high, and it is not worth the time, effort and cost for small-scale businesses to be registered.

(99 respondents)

Q7: Do you employ other people?

The majority (86.9% of 99 respondents) of makers do not employ others as a part of their business. This is a reasonably higher percentage than the CiAC survey which notes 68.4% as not employing others. The reasons for this rise are unclear: perhaps down to economic challenges, or perhaps the particular survey sampled. The high figure in general may be due to the majority of businesses being sole traders, with any additional work by others carried out on a freelance basis. In the CiAC survey, 85.6% of makers in Scotland were registered as sole traders. The scope of CiAC did include many amateur makers, and the 2017 survey was more targeted to established professional businesses, so it is perhaps surprising that the figure not employing others appears to have grown.

(99 respondents)

Q8: If you answered 'yes' to Q7 please specify the contractual status of your employees. (Tick all that apply)

Only 13 respondents answered this question. Of those, the contractual status of employees was mainly on a freelance basis (76.9% or 10 respondents). There appears to be a very low rate of craft businesses employing people on permanent contracts (15.4% or two of 13 respondents, see Table 3). Freelance working is very common across the arts in general, and this is no different within the craft sector. With so many sole trader businesses operating, and the often seasonal nature of sales (e.g. for jewellers the Christmas period is often the busiest time) it is not surprising that few can afford to employ others on permanent contracts, but bring in freelance workers to support the business at key times.

Answer Options	Response Percent
Permanent employees	15.4%
Fixed term employees	15.4%
Contracted (no fixed hours)	15.4%
Freelancers	76.9%

Table 3: Contractual status of employees (13 respondents)

Q9: If you answered 'yes' to Q7 please specify how many full-time equivalent people work for your business excluding yourself?

(Full-time is 35-40 hours per week, so two people each working 20 hours would be one full-time equivalent)

Of the 11 respondents answering this question, only eight recorded any percentage of full-time equivalent workers – ranging from 0.2 to 5 people (see Table 4 below). This highest number of full-time equivalent workers was only within one business. This would suggest that it remains unprofitable for the vast majority of the sector to offer sustained employment within their current business models. The CiAC results reflect a similar picture, with only 17 responses from 357 recording any full-time equivalent workers.

Respondent	Number of FTE workers
1	0
2	3
3	0.2
4	0.25
5	0
6	5
7	3
8	0.4
9	0
10	1
11	3

Table 4: Number of businesses employing full time equivalent workers (11 respondents)

Q10: Did you use any of these services during the financial year 2015/16?

(Options: Outworkers/freelance makers; web design/support; accountant; press/PR/marketing; general admin; intern (paid); intern (unpaid); apprentice/s (paid); apprentice/s (unpaid))

Answer Options	Occasionally	Regularly	Never
Outworkers/freelance makers	26	10	54
Web design/support	36	8	45
Accountant	21	27	46
Press/PR/marketing	28	1	55
General admin	9	0	72
Intern (paid)	8	4	70
Intern (unpaid)	4	2	76
Apprentice/s (paid)	0	0	80
Apprentice/s (unpaid)	3	1	79

Table 5: Services used by makers (98 respondents – multiple responses allowed)

The results in Table 5 show that in general, of those surveyed, additional services do not tend to be used. Of those used occasionally, the most popular are web design/support, press, PR and marketing, freelance workers, and accounting support. Of regular services, accounting is most popular, followed by freelance work and Web Design. Some paid intern work is evident too, perhaps boosted by schemes such as Adopt an Intern, which allows creative businesses to utilise graduate skills in a number of areas within their business (http://www.aai-talent.co.uk/about_us).

Q11: During the financial year 2015/16 did your business turnover: increase, decrease, stay much the same?

Over half of those surveyed (56.7%) reported increased turnover during financial year 2015/16, and over a quarter (27.8%) reported a similar turnover from the previous year (see Figure 5). This only leaves 15.5% with a decreased turnover, which suggests there is some buoyancy in the sector overall.

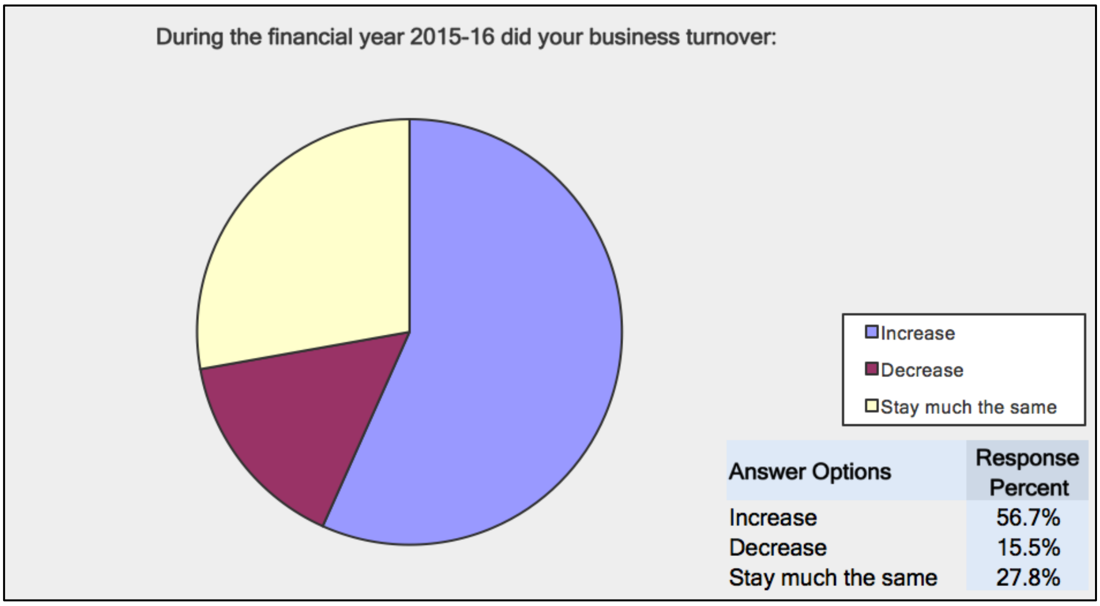
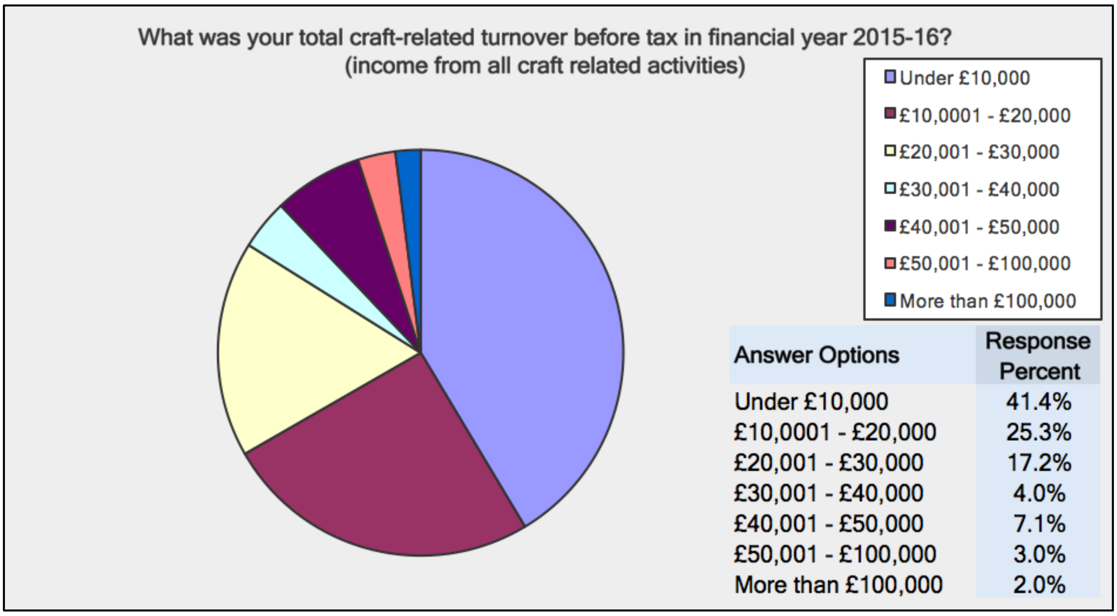


Figure 5: Turnover (97 respondents)

Q12: What was your total craft-related turnover before tax in financial year 2015/16? (Income from all craft related activities)?

Of 99 respondents, the majority reported a turnover of less than £30,000 (83.9%) (see Figure 6). A significant percentage of 41.4% reported turnover of under £10,000. In 2010, 87.2% recorded an estimated craft-related turnover of up to £30,000, with 72.5% of this under £10,000. There is thus a reasonable difference between the two surveys, with an increase apparently evident in 2015/16. There is likely to be some discrepancy in the figures due to the smaller sample of the more recent survey, and so there is insufficient evidence to suggest a real statistical increase. However, the number of makers reporting turnover of £30,000 remains reasonably consistent, which suggests that craft remains an activity with modest earning potential. The average turnover in 2010 was recorded at £20,920 for 360 respondents, although the median was reported at £10,000, which is perhaps a more realistic figure.[1] There are a small number of businesses that have a much higher turnover (2% reporting over £100,000) however this does not necessarily translate to high profit (which is dealt with below Q17).



Answer Options	Response Percent
Under £10,000	41.4%
£10,0001 - £20,000	25.3%
£20,001 - £30,000	17.2%
£30,001 - £40,000	4.0%
£40,001 - £50,000	7.1%
£50,001 - £100,000	3.0%
More than £100,000	2.0%

Figure 6: Total craft-related turnover before tax 2015/16 (99 respondents)

Q13: Did you have any non-craft-related income in financial year 2015/16?

The majority of respondents (62.6%) also reported having non-craft related income, which is unsurprising given the figures for turnover. This is a higher figure than reported in CiAC, where 49.3% of respondents reported having some non-craft related income.

(99 respondents)

[1] The nature of the questions and data collected for the 2017 survey does not allow for exact turnover figures to be reported.

Q14: What proportion of your income comes from non-craft-related activity?

Proportion	0	1-9	10-19	20-29	30-39	40-49	50-100
No. of responses	18	5	12	12	6	1	31
% of respondents	21.2%	5.9%	14.1%	14.1%	7.1%	1.2%	36.5%

Table 6: Proportion of income from non-craft-related activity (85 respondents)

85 people responded to this question. 67 people had some form of non-craft-related income, with 31 people reporting 50% or more of their income coming from non-craft-related income (see Table 4). It appears to be necessary to 'top-up' craft-related income in the majority of cases, which corresponds to the low levels of turnover reported from craft activity.

Q15: Please tick any of the following activities that made up your total income in financial year 2015/16. Tick all that apply.

100 respondents answered this question (see Table 7 for responses). The CiAC report separated the activities below in terms of craft and non-craft-related income. Here, they are dealt with together as total income.

The majority (80%) note the sale of craft objects to be a part of their total income, although due to the nature of the questions asked within this survey, it not clear exactly what percentage of income this might be. For future surveys this data may sought and taken into account to offer more depth to the figures.

Teaching, both formal (FE/HE/School) and informal, and craft and non-craft-related, are also popular ways for makers to supplement their income. The popularity of informal teaching is particularly noted on both the CiAC (24.1%) and this survey (53%). Other part-time work is common (21%), and it is also interesting to note that makers are using their craft and design skills in other sectors (14%).

Answer Options	Response Percent	Response Count
Making and selling contemporary craft objects	80.0%	80
Teaching craft to less formal groups, e.g. evening classes, workshops etc.	53.0%	53
Grants from trusts or public bodies	28.0%	28
Other part-time job	21.0%	21
Teaching or lecturing in art/craft/design at an FE/HE institution	20.0%	20
Support from partner or family	15.0%	15
Other private income	14.0%	14
Work for other business sectors using craft and design skills and knowledge	14.0%	14
Owning, running or working in a commercial gallery or craft shop	13.0%	13
Being a craft maker in residence	12.0%	12
Benefits	12.0%	12
Retirement income (e.g. pension)	9.0%	9
Running or organising craft events such as exhibitions or fairs	7.0%	7
Teaching art/craft/design in a primary/secondary school	6.0%	6

Other craft-related activity (please specify)	5.0%	5
Writing professionally about craft	4.0%	4
Other full-time job	3.0%	3
Curating exhibitions	3.0%	3
Private investment including sponsorship	2.0%	2
Working in a public museum or gallery (including in the museum shop)	2.0%	2
Teaching or lecturing at an FE/HE institution (but not craft or design related)	2.0%	2
Teaching in a primary/secondary school (but not craft or design related)	1.0%	1
Crowdfunding	0.0%	0

Table 7: Activities that make up total income 2015/16 (100 respondents)

68 of the 100 respondents reported three or more activities that made up total income, with eight as the highest number of activities recorded for one individual maker (see Table 8 below for details). Three or four activities seem to be a common number (25 and 23 responses respectively). The overall picture is one of a varied portfolio career, with the majority of makers finding it necessary to engage in more than one activity for sufficient income.

No. of activities	1	2	3	4	5	6	7	8
Reponses	18	14	25	23	11	7	1	1

Table 8: Number of activities undertaken

Although some makers only report selling and making as their sole income, several list many more than one activity. An Edinburgh-based ceramicist, glassmaker, and metalworker, for example, who has been running their business for between 10-20 years, also lists working in FE/HE and securing grants from trusts or public bodies alongside making and selling objects. A furniture maker from Midlothian, in business for over 20 years notes six activities making up income for this financial year: making and selling objects; grants from public bodies; informal teaching; writing professionally about craft; being a craft maker in residence; and working for other sectors using their craft and design skills. A Glasgow-based textile maker and knitter in business for 3-5 years notes securing grants, residencies, running craft events/fairs, private investment, and other part-time work as the various activities that make up total income. Thus both those with more established businesses, and those newer to the field, report the need for portfolio working. This is not necessarily negative, but does highlight the arguably minimal capacity of craft making and selling, as a sole revenue stream, to be a sustainable option for business development.

<u>Q16: What percentage of your sales of contemporary craft objects in 2015-16 came from work exported outside the UK?</u>
(this includes work sold on your own website to people overseas.)

Only 79 makers responded to this question, and perhaps this suggests it was not relevant or applicable for the additional 30 makers who took part in the survey. Of those that responded, the majority report less than 5% of their sales as exported outside of the UK (this includes 21 zero figures). An additional 30 makers report less than 20%, with only 2 reporting over 50% of sales as exports (see Table 9 below for full numbers). Overall this points to a lack of capacity in the business, and perhaps a lack of knowledge in the processes needed to establish or access international markets.

Percentage of sales as export	Number of respondents	% of respondents
0	21	26.5%
1-4	14	17.7%
5-9	14	17.7%
10-19	16	20.3%
20-29	6	7.6%
30-39	3	3.8%
40-49	3	3.8%
50-59	1	1.3%
60-69	1	1.3%
70+	0	0%

Table 9: Percentage of export sales (79 respondents)

However, the CiAC report noted that 27.4% of respondents exported work in 2010, and the results for 2015/16 show an increase to 54% (of the 109 surveyed overall). This increase may reflect the particular sample surveyed, and Craft Scotland have developed several international exhibiting and selling opportunities in the past few years (e.g. ACC Baltimore, SOFA Chicago), which several respondents were involved in. These opportunities may well have contributed to a rise in export sales, although exporting internationally is still an avenue that could still benefit from further focus in the Scottish craft sector (see also Q24 & Q25 in Part 2 for respondent comments on support with exporting and working internationally). Anecdotal evidence gathered by Craft Scotland also suggests that export sales via makers' own online channels may have risen in recent years, and so there is clearly further opportunity here to support makers with this aspect of business development. Tracking this will therefore be key for future surveys.

Q17: What was your approximate net profit (after tax) for your craft-related work in financial year 2015/16?

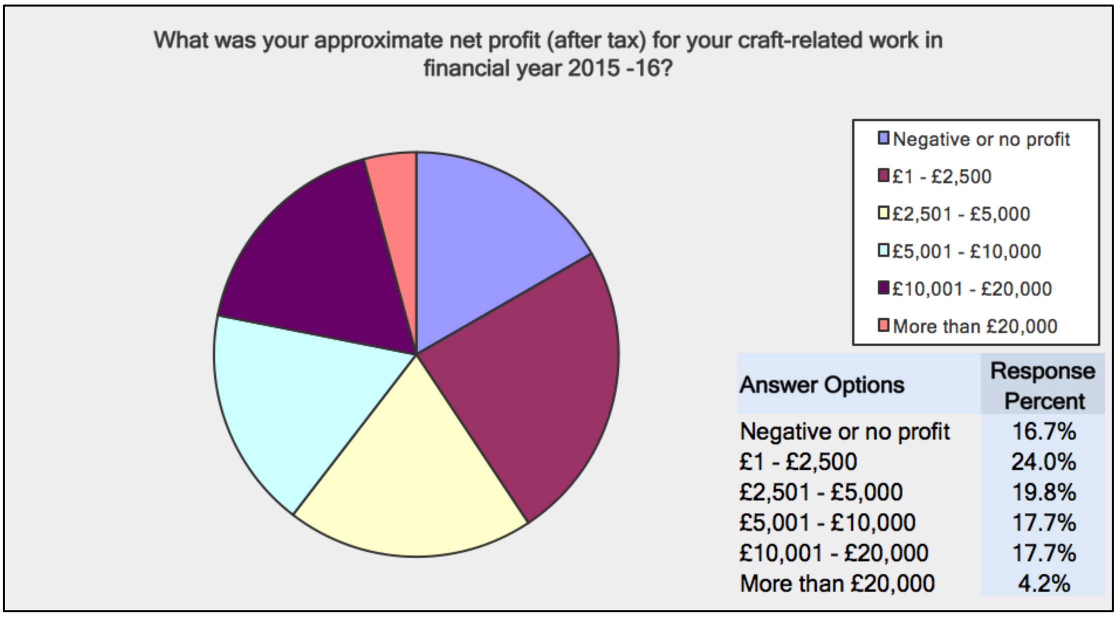


Figure 7: Approximate net profit after tax 2015/16 (96 respondents)

Profit for craft activity remains low, with 60.5% reporting profit of £5,000 or under in the year 2015/16 (see Figure 7 above). Of this amount, 16.7% report no profit or a negative figure. The CiAC report reported 75.3% of makers earning £5,000 or under, with the average calculated at £6,595, and median at £2,750.[2] Although the percentage of makers in 2010 recording less than £5,000 profit appears higher than that in 2015/16, the sample surveyed is also higher and so more diversity in responses is to be expected, and the numbers here cannot be taken as fully indicative. Nevertheless, both surveys indicate a large number of businesses operating on low profit earnings.

In this 2015/16 survey only 17.7% reported profit of over £10,000 (8.9% CiAC) with a further 4.2% reporting profit of over £20,000 (8.7% CiAC). Again, the figures cannot be taken as indicating a healthier sector due to the smaller numbers responding to the survey, but it underlines that craft generally cannot be seen as a particularly lucrative career when done in isolation, with other intrinsic motivations, and the capacity for portfolio working, perhaps reasons for continued engagement in the activity.

Q18: Which ways do you sell your work? Tick all that apply.

Sales options	Percentage	Number of respondents	CiAC percentage
Commissions from general public	81.00%	81	44%
Direct to the public from studio, workshop, home	73.00%	73	36.8%
Through a commercial gallery or exhibition	68.00%	68	49.3%

[2] The nature of the questions and data collected for the 2017 survey does not allow for exact profit figures to be reported.

Through a craft shop (including gallery and museum shops)	64.00%	64	18.6%
Word of mouth	62.00%	62	2.5%
Through craft fairs	53.00%	53	35.7%
Your business website	52.00%	52	36%
Social media (Facebook etc.)	36.00%	36	5%
Direct to retailers (other than galleries)	35.00%	35	17.5%
Pop-up shops	30.00%	30	N/A
A third-party website	27.00%	27	14.7%
Commissions from businesses (e.g. architects, designers)	26.00%	26	17.5%
Trade fairs	25.00%	25	N/A
Commissions from institutions (e.g. museums)	18.00%	18	12.2%
Through street markets	4.00%	4	6.1%

Table 10: Sales avenues for 2017 survey with corresponding figures for Craft in an Age of Change Report 2010 (100 respondents)

There are some major differences between the sales avenues reported in CiAC and this survey (see Table 10). Again, much of this will be down to the smaller sample of respondents and the slight differences in the options given. However, some interesting differences are worth mentioning. Commissions from the general public are an extremely popular sales avenue, with 81% choosing this option (compare this with 44% in CiAC). Direct sales from the studio or home are also high in the 2017 survey – at 73%, when this was noted at 36.8% through CiAC. These may indicate a desire for the public and other customers to go direct to makers to see their work, experience their studio environment, and engage in the experience of buying craft directly, as is confirmed in the comments cited in Q4 above from Rawsthorn (2015) and McKeough (2015).

Another interesting difference is the amount of people citing social media as a key sales avenue. In 2017 this is at 36%, up from only 5% in CiAC. This may relate to the types of makers that responded to this survey, and yet given the rise in social media usage and platforms across society, and indeed for business practice overall in the intervening years, it indicates that this is an avenue for many makers to direct more focussed attention (with the necessity to provide training and support for those makers without a strong digital literacy). Direct sales from a business website (52% in 2017 survey vs 36% in CiAC 2010), and from third party websites (27% vs 14.7% CiAC) also shows an increase in the success of online sales channels. Although these still appear to lag some way behind direct sales and commissions, there is some evidence to suggest this is growing and may continue to grow further with the right development.

Sales via commercial galleries and exhibitions show slight growth (68% vs 49.3% CiAC) craft fairs remain a significant contribution (53% vs 35.7% CiAC), and direct to retail sales seem to be gaining in popularity (35% vs 17.5% CiAC), based on the available figures. An anomaly appears to be the 'word of mouth' figure which is very high for the 2017 survey. Perhaps there is some growth in this channel, although it is more likely that respondents interpret this in different ways, for example duplicating or relating to direct sales. This option may be seen as more of an overview of how inquiries come in to the maker, rather than a way in which sales are made, thus people may place more or less importance on this depending on the other choices they have made in the survey.

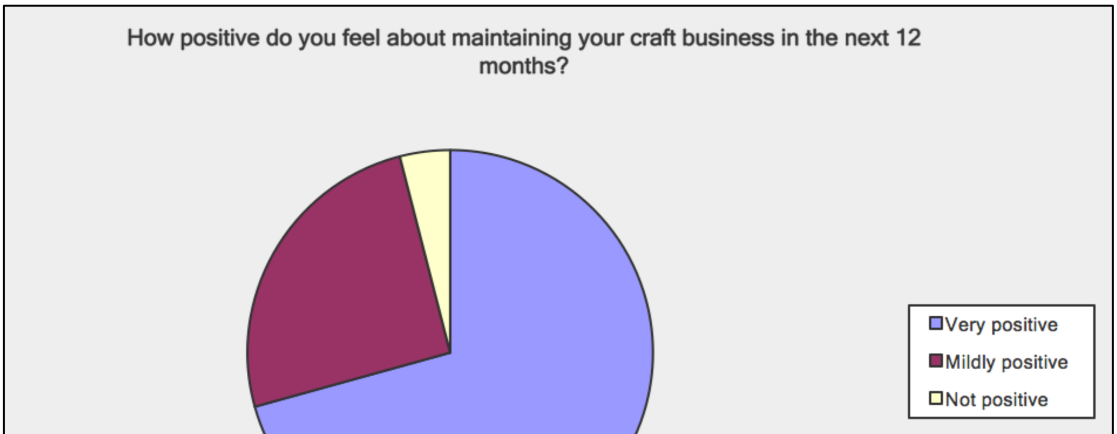
<u>Q19: Please list the top three ways in which you sell your work in terms of sales value (with 1 being the highest)</u>

Option	Response Count	No. 1 choice
Direct to the public from studio, workshop, home	53	14
Commissions from general public	49	14
Through a commercial gallery or exhibition	44	18
Through a craft shop	38	7
Through craft fairs	36	10
Your business website	25	6
Word of mouth	20	1
Commissions from businesses (e.g. architects, designers)	18	6
Direct to retailers (other than galleries)	18	8
Pop-up shops	16	3
Trade fairs	15	3
A third-party website	14	3
Social media (Facebook etc.)	13	0
Commissions from institutions (e.g. museums)	11	3
Through street markets	5	0

Table 11: Popularity of sales avenues in terms of sales value (99 respondents)

The three most popular sales avenues for this survey were: direct from studio, workshop or home; commissions from the general public; and through commercial galleries or exhibitions (see Table 11). This compares with CiAC as: through a commercial gallery or exhibition; direct from studio, workshop or home; and through craft fairs (although the question was phrased as the ‘single most important option’ rather than top three). These figures connect to the responses in the previous question. Word of mouth here comes in much higher as an overall figure here than the CiAC survey (when listed as top 3), although in both surveys only one person mentioned this as a top selling method. This may be an anomaly with the samples surveyed, although perhaps the popularity of word of mouth may also be connected to the rising importance of social media (although no respondents noted this as a top sales channel in CiAC), as this may now be a central source for customers to find new makers that have been recommended or showcased via friends’ online networks.

Q20: How positive do you feel about maintaining your craft business in the next 12 months?



Answer Options	Response Percent
Very positive	70.7%
Mildly positive	25.3%
Not positive	4.0%

Figure 8: Positivity about maintaining craft business in next 12 months (99 respondents)

The picture painted is a positive outlook for the next 12 months (see Figure 8). There does not seem to be a direct correlation between a positive outlook and significant financial success within the craft sector. Although 56.7% of makers reported increased turnover during financial year 2015/16, many businesses report low or no profits, yet appear to be very or mildly positive in their outlook. Some businesses might not rely on the profits from their craft business within their portfolio approach, and so this may not be as strong a factor in the desire to maintain a craft business. In 2010 the CiAC report noted that Scottish makers were more optimistic about sustaining their business over the next three years than makers in the rest of the UK. Perhaps life in Scotland promotes a more optimistic attitude in general!

Of those four respondents that were not positive about maintaining their business, three were new businesses within 3-5 years of starting, and one was more established, running for between 5-10 years. All were operating with low profit levels (£2,500-5,000), or negative profits. Only two respondents offered any suggestions as to why there might be a lack of positivity, citing declining sales and the proliferation of ‘copycat’ products being made and sold by ‘hobbyists’ at lower price points.

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Part B: The role of Craft Scotland

Section 1: Executive Summary

The survey posed questions relating to the role of Craft Scotland, and asked how the organisation might be able to provide opportunities for further development in the sector. The results confirm that Craft Scotland is seen to support makers, and is recognised for the value of the services offered. There are however a few recurring challenges and issues raised that might warrant further consideration in terms of the support Craft Scotland can offer makers and craft professionals in Scotland.

- **Training:** makers are keen for targeted training in the right areas. Business development and financial advice are welcomed, and bringing various options to those people working and living beyond the central belt is acknowledged as a challenge. The development of distance learning options was raised as one approach that could be considered for mentoring and targeted skills development.
- **Exhibition and selling opportunities:** respondents note their interest in the development of further exhibiting opportunities, both for high-end work and for more varied, diverse, and large-scale events across Scotland and the UK. The lack of export capacity in the Scottish sector is also noted, and a role for Craft Scotland is seen in brokering opportunities with key partners and retailers both within the UK and internationally. The existing opportunities (such as London Design Festival, SOFA Chicago, ACC Baltimore) are welcomed, but seen as limited to select makers.
- **Peer support networks:** Craft can be an isolating career, and makers welcome the events and workshops that are already provided by Craft Scotland. However, perhaps there is also a role for the organisation in facilitating less formal networking opportunities, and calling on motivated makers in the sector to take forward peer-led opportunities for informal mentoring and support.
- **Diversity:** Several makers commented on an apparent lack of diversity in those chosen to exhibit at key events. As Craft Scotland is a champion for high-quality, professional craft in Scotland, it can be challenging to ensure this quality is represented equitably for high-profile events. There may be an opportunity therefore for both developing different types of events that are open to more makers, and also building a shared understanding of quality across the sector. Time made available to provide constructive feedback and advice to unsuccessful applicants, through mediatory and mentoring services, may also be another way to support the sector to continue creating high-quality work.
- **Awareness raising:** this relates to both the development of shared professional standards across the sector as well as with public audiences. There is a perceived need to continue to raise awareness and educate the public on the value and quality of craft in Scotland, so that the cost of making can be fairly added to the price of goods sold. How this is to be done successfully is not suggested, yet Craft Scotland are seen as the voice for this campaign within Scotland. Perhaps there is the possibility to leverage this desire for change that exists within the community to co-create and lead new initiatives to raise the profile and demonstrate the value of craft more widely.

Section 2: Survey results and discussion (Q21-25)

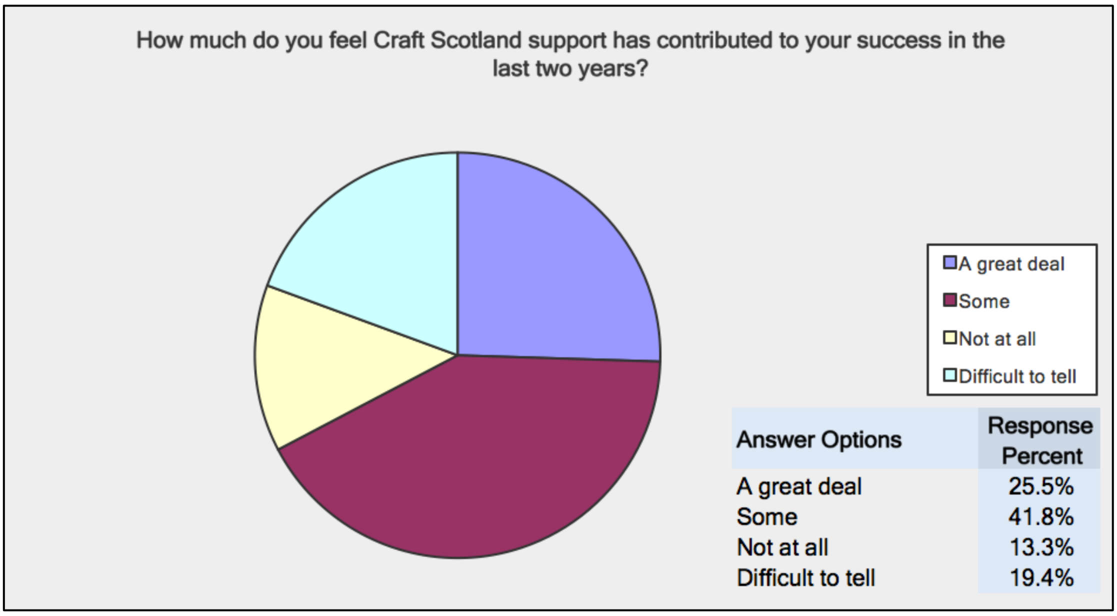
Q21: Please select which Craft Scotland events you have been involved in during the past two years. Tick all that apply

Answer Options	Response Percent	Response Count
UK exhibition e.g. Summer Show/London Design Fair/Craft Gallery at Scotland's Trade Fair	45.4%	44
Meet Your Maker	42.3%	41
None	17.5%	17
Training event e.g. Hothouse/Injection/Mentoring/Tourism/	16.5%	16
Conference	14.4%	14
International exhibition e.g. SOFA Chicago/ACC Baltimore	11.3%	11
Other (please specify)	10.3%	10

Table 12: Craft Scotland events attended in past two years (97 respondents)

The survey was sent out to makers in the Craft Scotland network, most of whom were known to have taken part in some type of activity organized by Craft Scotland in the previous two years. Almost half of the 97 respondents to this question have taken part in a UK exhibition with Craft Scotland (see Table 12). The Meet Your Maker scheme also has high engagement. Only 16.5% of makers have attended training events. Some individual responses from more rural areas of Scotland report the desire to see more local events beyond Edinburgh and the central belt, and inevitably the cost and time required to travel to events will minimise the numbers from across the full breadth of the country. However, the high numbers having work exhibited both nationally and internationally does suggest that Craft Scotland is providing opportunities for makers to showcase and sell their work, even if their training needs seem to not be met as successfully. Other events mentioned include: Craft Scotland and VAS Celebrate Ceramics; Come and See event at Scotland's Trade Fair; National Museum of Scotland collaboration; National Trust Scotland collaboration; Growing in Confidence; Craft Tourism workshop.

Q22: How much do you feel Craft Scotland support has contributed to your success in the last two years?

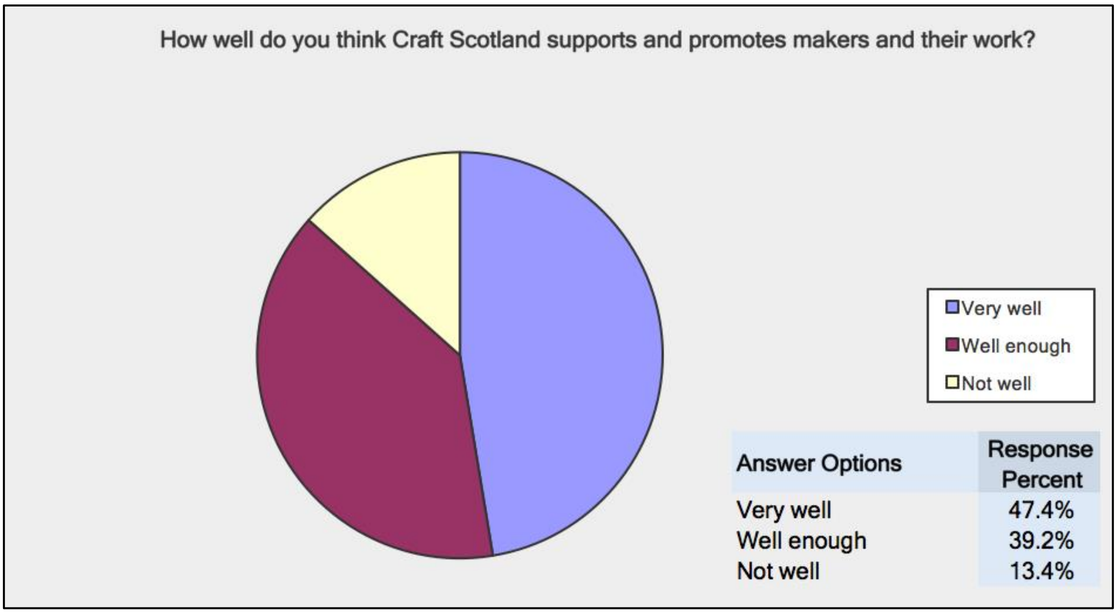


Answer Options	Response Percent
A great deal	25.5%
Some	41.8%
Not at all	13.3%
Difficult to tell	19.4%

Figure 9: Craft Scotland's contribution to business success over two years (98 respondents)

Overall 67.3% of 98 respondents felt that Craft Scotland support had contributed in some measure to their success in the last two years (see Figure 9).

Q23: How well do you think Craft Scotland supports and promotes makers and their work?



Answer Options	Response Percent
Very well	47.4%
Well enough	39.2%
Not well	13.4%

Figure 10: How well Craft Scotland supports and promotes makers and their work (97 respondents)

86.6% of makers feel supported in some measure by Craft Scotland, suggesting the positive influence of the organisation overall (see Figure 10). However, despite 47.4% of makers feeling very well supported, it is clear there is still some work to be done. 'Well enough' may not be a strong enough endorsement from 39.2%, and 13.4% of makers do not feel supported at all. Comments within Q24 and Q25 below give some background to the positive influence of the organisation, and also offer some contextual background for this more negative experience.

Q24: What do you feel Craft Scotland could do better to help you?

Q25: If you would like to take the opportunity to make any other observations or comments about anything in this survey, please do so here.

Q24 and Q25 have been combined below into seven themed sections, bringing together various comments and suggestions provided by respondents. These sections include: the development of more selling and exhibition opportunities in the UK and abroad; specific actions that could be taken with regard to support and training; comments on alternative foci for support; general suggestions or critique relating to Craft Scotland as an organisation; comments on a perceived lack of diversity in those supported by Craft Scotland; comments relating to the need for network building and raising awareness; and positive comments and affirmation of the role of Craft Scotland in supporting makers in Scotland. Some discussion is provided after each set of comments, to bring out recurring insights and areas for future development.

(Q24: 59 respondents. Q25: 14 respondents.)

1) Development of more exhibition/selling opportunities: both at home and abroad:

- "I would like to see more exhibition opportunities available through Craft Scotland to present high-end/exhibition/museum quality work"
- "Instigate and promote more high-end opportunities to show and sell work
- "Crucially I'd like to see them continue to offer varied and exciting opportunities for makers creating high-end works, as this can be difficult to make and sell during uncertain financial climates. Championing the makers they represent sets a standard for Craft in Scotland."
- "Additional selling events possibly at Christmas"
- "Organise more craft fairs exclusively for Scottish makers inside Scotland"
- "Provide financial support to local events such as craft fairs and open studios."
- "I would be interested in seeing Craft Scotland working directly with department stores overseas…to open a temporary/pop up concession…even look into hosting buying agents/distributors to showcases."
- "If I were to suggest anything, I would propose the development of an annual Craft showcase in conjunction with the conference modelled on America's NCECA conference… A similar event on a relativity large scale in Scotland could promote craft at a fine art level to collectors the general public and educational organisations and could have a massive impact on the appreciation of craft in "mainstream" Scottish society."
- "A better event/presence during Edinburgh Festival i.e. an 'indoor market' type of experience but one that is of very high-quality and looks different to anything that's been done before. Using 'the marketplace' as a basis for a new way of shopping like an alternative department store…location has to be a

top priority. A great, well-organised annual event could account for a good percentage of a makers' annual income from craft."

- "I think there is much scope for looking into English cities outside of London… There is also scope to run rural programmes which address the smaller footfall and perhaps coincide with other events, especially seasonal, which happen throughout the year."
- "Opening up [Meet Your Maker scheme] a bit would be beneficial perhaps linking it with pop-up exhibitions to allow potential customers to meet and see the craft workers in their area as well as see their work."
- "…arrange pop-up exhibitions in areas around the country to show the local population what is available on their doorstep at the moment too much is highly selective and Edinburgh-based and there is a lot more of Scotland who want to buy well-made and well-designed work in their own area."
- "Some kind of project facilitating a group of interested makers selling to or through an interested export retailer or group - maybe a pop-up section in a suitable retail environment in somewhere like New York. Individual makers will often find the shipping, duty, insurance and paperwork involved makes exporting too difficult."

The craft community in Scotland see value in the work Craft Scotland do and the opportunities they offer, but feel that more or slightly different types of event might further support them in sustaining their businesses. This could be, for example, extending exhibitions or selling opportunities beyond the main hubs of Edinburgh and London, and bringing more attention to other cities and more rural locations (where there may already be local events that might benefit from Craft Scotland support as the national organisation). Although in some comments below, makers feel that there is not enough focus beyond the high-end craft market; here there is a sense that high-quality craft still needs additional outlets for promoting and underlining the value of this activity within Scotland.

2) <u>Specific actions on support, training and mentoring:</u>

- "More promotion on Social Media"
- "More mentoring"
- "Provide an index of recommended shops and galleries in different regions so craft workers could see where their work might be sold to make sure it would be appropriately displayed before approaching proprietors."
- "Advice on finances, cash flow and funding is always beneficial… advice specifically tailored to [craft businesses] is definitely more beneficial".
- "How to move from a maker to a manufacturer, how to get finance to do that"
- "I am not good or confident in representing myself to galleries. I would like support with that."
- "Identify the specific needs of the craft worker to ensure courses are relevant with more information to show exactly what is to be covered."
- "More support could be given to makers in north east Scotland"
- "Offer support to those who are not considered a 'start-up' company, offering mentoring and advice on ways to expand and grow a business."

- “More open access training events rather than selective schemes or those targeted at new grads.”
- “Arrange better courses locally or based on a distance learning structure… perhaps appointing a distance learning tutor who can begin to guide you through some basic principles [of social media] and help you start to make real progress which would build confidence and help you to become independent.”
- “I would like to offer work experience to an aspiring artist/craft worker but would need help to find the right person.”

Business development avenues are seen to be crucial for many craft makers, specifically for targeted training for small-scale craft businesses. It is interesting that a distance learning model is suggested, as this ties in with the suggestions for more support in rural locations that may not currently be financially feasible for Craft Scotland to implement. Distance learning tutors, or peer networks may be one way to consider addressing this imbalance. The suggestion from an established maker that they wish to offer their services to aspiring makers, but may not know how to do this most effectively, points to a brokerage role for Craft Scotland in developing peer to peer opportunities that may not require large amounts of financial support.

3) <u>Comments on alternative foci for support and advice:</u>

- “If there could be more attention focused on makers who only produce one off pieces of work in any craft medium, it would be advantageous to me and others who, like me, produce art within a craft discipline.”
- “I would like to see more support for traditional forms of craft as well as the cutting edge”
- “I have very little time to get to know you, too busy working. I would like to see an award for artists to spend TIME on developing new work.”
- “It would be helpful for attention to be drawn to copying within craft industries… our sales and turnover have dropped dramatically in the last 18 months as numerous people have started copying and selling our product ideas. Often they are doing it as a hobby and charge unrealistically low prices, leaving no room in the market for quality full-time makers… It would be good for awareness to be raised that if you copy the work of a maker, you are taking away from their income.”

It is inevitable that in such a diverse area as craft, in a rural economy such as Scotland, with many individual businesses with unique concerns, that there will be unique issues that arise. That said, issues of copying within craft and design sectors can be a wide concern and perhaps there might be a role for Craft Scotland in championing professional integrity, alongside the need for wider promotion and awareness raising of the value of craft (which is noted below). Time to think and develop new work is also an issue raised within craft circles, and there is not often designated funding available for this when it does not relate directly to a clear ‘outcome’. As an advocate for professional development, Craft Scotland can continue to pursue opportunities and make the case for financial support less dependent on the work, and more on the growth and wellbeing of the maker.

4) <u>General suggestions or critique:</u>

- “I would like to see greater understanding of the processes of making in the staff at Craft Scotland.”
- “I hardly ever hear from Craft Scotland asking how I am doing, what I am doing and offering any support at all. I would love to hear from you more often with encouragement. It's a lonely life being a sole worker.”
- “Get to know us better, make an effort to have a conversation with us at events, be more approachable, be more interested”
- “I'd like to see some kind of social get-together type event where makers from all over Scotland can come together for a day of workshops, talks and meeting one another. I'd be happy to pay to attend this kind of event and would value the opportunity to connect with other makers.”
- “More peer group activities. Opportunities in which artists and makers can meet and support each other, not necessarily through having a conference but in small groups. Although this can happen naturally sometimes, it would be useful for Craft Scotland to facilitate such events.”

Craft can be a lonely career option, and social events may be one way in which Craft Scotland can help facilitate and build stronger community networks. It would require more investigation into a suitable model for generating interest, and the capacity for makers to come together given the dispersed nature of makers across the country. Two avenues for exploration might be an informal ‘association’ with members connected by a professional body – such as the Association for Contemporary Jewellery offer for jewellery designers across the UK (http://www.acj.org.uk/). This relies on local members organising events, with small levels of support available to run workshops etc. Another very informal event developed within certain parts of the museum industry is #drinkingaboutmuseums. Organised via Twitter, social gatherings for like-minded people with an interest in museums and museum practice are suggested during conferences and festivals, in particular cities, or based around specific institutions. Again, this requires individuals (who are engaged with social media) to organise events locally, but can be a useful way of meeting others with shared interests and concerns, and building both informal and professional networks. This type of event with a craft focus could be supported and promoted by Craft Scotland, particularly around their existing events.

5) Comments on the lack of diversity in those supported:

- “There seem to be the same faces appearing at lots of different events and I feel opportunities could be more evenly distributed”
- “Try not to select the same small group of makers to support.”
- “It sometimes feels like there are some makers who are selected for lots of shows and some who are never selected - it would be good to really vary the makers taking part from year to year so that help is given to the most makers possible if the work is of a high enough quality.”
- “I feel small makers tend to be overlooked by Craft Scotland. I feel it tends to promote the same 'trendy' businesses year on year and focuses on very high-end and already high-profile businesses.”
- “[Craft Scotland] has become too selective and misses a huge area of the local market who love to buy and support craft.”

- "Opportunities initiated by Craft Scotland sound inspiring but seem limited to a very few practitioners. Perhaps there are other ways in which the funding could be spread more equitably or could support more of our makers."
- "The level of support given over to [certain projects] was unfairly proportioned"
- "Craft Scotland concentrates more on highbrow/high-end makers…there is a middle ground that merits attention"

Maintaining a focus on high-quality craft and championing this nationally and internationally can be challenging, and it is clear that not all makers in Scotland will have the opportunity each year to be involved with high-profile events (due to limitations in funding and capacity). Inevitably high-profile events garner more public attention, and particularly when showcasing Scottish craft abroad it is vital to be promoting the highest quality possible. However, there is clearly a perception that there could be more diversity, both in those makers being supported, and in the types of craft being showcased at events. Perhaps better mechanisms for providing constructive feedback to unsuccessful applications might support the community in adding value to their business in different ways. It might also be welcome, as is noted above, to develop or support events that include larger numbers of makers, or perhaps there is scope to offer other forms or support to self-organised events that could make use of the Craft Scotland brand. This might be something that requires further consultation with the sector, to see how further diversity can be incorporated.

6) <u>Comments on network-building and raising awareness:</u>

- "Support the development of curatorial activity. Network building with commissioners, curators, craft writers and journalists, collectors, gallerists and dealers. Network building with architects, interior designers and luxury manufacturers."
- "Liaise better with other agencies and conference organisers, fair organisers etc. - to become involved in their events too, not just CS organised events."
- "I still think the general public is largely unaware of Craft Scotland. There needs to be more awareness raising."
- "More events and workshops to educate and get the public involved with crafts"
- "We need to do more to build a market at home, increase awareness and appreciation of high-quality craft here in Scotland."
- "Perhaps more promotion of Craft Scotland to markets outside Scotland - rest of UK and World - through other agencies promoting UK made products."

As noted above the building of networks is crucial, both informal and professional. There is also a perceived need to continue building awareness in public audiences, of the value and appreciation of craft. Building public awareness is likely connected to creating strong connections with other similar organisations, and perhaps there is some work to be done for Craft Scotland to continue to be a champion alongside other organisations, at shared events and public programmes.

7) <u>Positive comments and praise of Craft Scotland:</u>

- “Am very happy with Craft Scotland. The aspect I use most is the monthly opportunities etc. email.”
- “…Craft Scotland is doing a fantastic job and have an excellent team working with and for Scottish makers generally and whilst I may have the odd gripe now and again I know that Craft Scotland is doing the best it possibly can under restrictions that we as makers may not be fully aware of from time tabling, budget restrictions etc. ... keep up the good work”
- “I…don't make functional items or multiple items of one design…I don't see many opportunities to take advantage of on Craft Scotland newsletters, however having a presence on your website is very helpful and I have been contacted by those who have found me through Craft Scotland, so thank you!”
- “I probably need to engage with Craft Scotland more”
- “I think I need to get better at what I do and then can participate in what CS offer.”
- “I think Craft Scotland is a highly progressive organisation. I would love to be involved with them more often and participate in more international, and national exhibitions.”
- “I have always found the staff at Craft Scotland very helpful and I believe they provide an unfussy, valuable service.”
- “For a business based in a remote location, where exhibition/trade events are logistically extremely difficult, Craft Scotland has made exhibiting at LDF really very accessible.”
- “Keep doing what you're doing - supporting makers and offering opportunities to exhibit at UK and international exhibitions.”
- “Nothing more to add. Craft Scotland is a great organisation to have supporting the field! Thanks.”
- “I think Craft Scotland is on the right track, I'd like to see them continue to seek feedback from makers, partners, funding bodies, gallery/shop owners, and other parties involved in the industry.”
- “The newsletters are very good and it is great to know what is going on out there and what opportunities there are to aim for.”
- “No further comments - thank you for the good work that you do! It is sorely needed and a lifeline for so many designer/makers.”

All of the constructive comments in the sections above are vital in developing understanding of the craft sector, their needs, desires and challenges. It will be important to continue gathering feedback year-on-year to see whether new initiatives can tackle some of the issues that the sector has shared here. Yet it is clear that Craft Scotland is seen to already be providing a valuable service. This is through their voice for championing craft nationally and internationally; the central online presence provided to direct interest to makers (which is in the process of re-development); the ‘helpful’ and ‘unfussy’ service that is provided by staff; and the opportunities provided across various platforms and events. This is a strong base from which to continue to grow and develop further avenues for exhibiting, selling, training and support across the craft sector in Scotland.