Craft SCOTLAND

Annual Tracking Study 2019

An insight into the creative and business practices of Scotland-based makers

Prepared by Craft Scotland & CG Research
August 2020

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Foreword

As the national development agency for craft, Craft Scotland is interested in examining the working models, finances and routes to market for Scotland-based makers. Thank you to all the makers who gave their time to respond to the survey. This information means that we can target our support for the sector and shape our advocacy and communications with key stakeholders including our partners, funders and government.

We are pleased to see the craft sector in Scotland continues to display positivity, adaptability and resilience. The craft sector supports and attracts a large portion of female entrepreneurs and makers due to its flexible working patterns and potential for diversifying income. Makers display a high level of technical skill, with the majority of makers completing further education and undertaking continuous learning. Additionally, craft is evidently appealing for those embarking on a second career, resulting in an interesting and diverse range of experience within professional networks.

Whilst take home salaries continue to remain modest when compared to the national average, it is still heartening to see a positive sentiment amongst the respondents about continuing their craft career, and new makers still appear to be joining the Scottish craft sector.

From our research, craft businesses can typically be categorised as sole traders based across Scotland, with multiple income generation streams. Additionally, this survey focused on types of financial support, training, education and development a maker may have had over the course of their career. We asked makers to provide information relevant to the previous financial year taken from their completed tax returns (April 2018 to March 2019).

This survey continues Craft Scotland's sector research that includes the State of the Sector (2017) and Annual Tracking Study (2018). Through such research we aim to track trends and gauge any significant shifts in the environment that may impact on makers developing a thriving creative and business practice. Previous surveys focused on makers who had interacted with Craft Scotland through our programme of activity, this Annual Tracking Study (2019) was open to all makers across Scotland. Following completion of this survey, the global pandemic in 2020 has significantly disrupted the industry and we have carried out further investigation to measure its impact (see Craft Journal).

My thanks go to Claire Gilchrist at CG Research for her support in designing and conducting this survey and preparing this report and her analysis of the results. Recommendations in this report are those of CG Research.

Irene Kernan, Director
July 2020

Comparisons across the surveys (2017, 2018, 2019)

Continuing trends in contemporary Scottish craft

- Top 3 disciplines found in Scotland continue to be textiles, ceramics and jewellery
- Craft is a second career for over 2/3 of makers
- Craft continues to be a female-dominated industry (ranging from 79% to 82% across the years)
- Craft as a career continues to appeal to a broad range of ages
- The majority of makers continue to be primarily based in the central belt, however there is a spread of makers across all the geographical regions of Scotland
- Despite modest levels of income, makers continue to have high career satisfaction

Shifting trends

- 16% of respondents in 2019 identified as having a mental health condition compared to 6% in 2018
- Slight shift in the numbers of makers whose annual net income came from craft related activities in the lower category. In 2019, 57% had a net income of £1-£10,000, compared to 41% in 2018, 39% in 2017.

Survey findings

Methodology

The survey was created as an online survey with an invitation sent by Craft Scotland to the makers on its database. The survey was also promoted via partner organisations and on Craft Scotland's social media channels.

The survey ran through July-September 2019. 144 makers responded to the survey.

Craft practice

Textiles (31%) is the largest craft discipline represented, followed by ceramics (22%) and jewellery (17%).

25% of makers responding have been working professionally as a maker for up to 3 years; an equal proportion have been working professionally for more than 20 years (24%). For 69% of respondents their career as a maker was their second or subsequent career.

Demographics

80% of respondents are women. 42% of respondents to the survey are aged under 45. The single largest age group is 45-54 (29%). 30% have caring responsibilities including having dependent children.

16% of respondents identified as having a mental health condition. 8% of respondents identified as having a cognitive or learning disability.

25% of the people who responded live in Glasgow or Edinburgh; respondents from Aberdeen City/Aberdeenshire accounted for 12% and Highlands for 11%.

Education & Training

93% of respondents already have or are currently studying for a qualification. Of all respondents, 69% had an undergraduate degree. Of those with a qualification, slightly more people had studied for a craft related qualification (62%) than a non-craft related qualification (58%).

18 respondents had undertaken some form of apprenticeship; most typically this was informal (e.g. work placement with established maker). Over half of respondents had taken part in weekend and evening workshops as training or professional development.

Financial support

62% received some form of financial assistance to support their education or training. 35% had received a student loan and 27% of respondents a student grant.

Over 40% of respondents received some form of financial assistance for their business or work as a maker including loans. The highest source was bursaries and awards (16%) followed by start-up grants, Creative Scotland funding and local authority funding (all 13%).

Networks

35% of respondents have engaged with Craft Scotland in the past 3 years. Over half were a member of a professional arts/craft network particularly the Craft Potters Association (UK), Scottish Potters Association and Scottish Artists Union.

20% had received professional recognition such as prizes, residences and awards in the past 3 years.

Sales channels

Direct sales to the public from studios etc. (64%) and via craft fairs (59%) were the sales channels with the highest use. 54% sold their work though commissions from the public. 93% of respondents sold their work via direct contact with the public (excluding commissions) and 75% via online/social media platforms.

The majority of respondents generated no sales from exports (60%).

Craft income

90% of respondents made some income from making and selling craft with this being the top source of income (in terms of value) for 68% of respondents. For 12% of respondents their top source of income was teaching to less formal groups and for 7% it was from teaching at FE/HE.
In terms of annual gross turnover from craft related activities, 14% identified that they generated no income; 26% of makers generated between £1 and £5,000.

In terms of the annual net income from craft related activities, 57% had a net income of up to £10,000.

Craft related income increased for 45% of makers (for the financial year 2018/19). Where there has been growth, the biggest change was increased activity and new sales channels. The proportion of respondents whose income decreased was 19% with this being related to reduced activity, loss of sales channels and increased costs. 48% of respondents identified that they had non-craft income in 2018/19.

Overall income

The income for 35% of respondents provided the primary household income. For 17% it is the sole household income.

Business

The business structure for the majority of respondents is a sole trader (80%). 13% of respondents employed other people.
Over 70% had used professional services with over half using a photographer (54%) and 36% web design/web support, 24% social media planning/support and 21% accountancy services.

Of the respondents who used none of the services, they did the activity in-house with some citing cost as the reason for doing this.

Business aspirations

75% of respondents have an ambition to grow their turnover with 61% of these having a target of more than 50% growth.

Business support services

The areas where support is required to meet financial targets are principally related to sales and marketing with the highest being promoting the business (68%), developing new sales channels/relationships (55%) and selling on social media/online (48%).

There is a preference for training/mentoring to be provided so that makers can deliver the services themselves once trained. Generally there is equal interest in online training and face to face training. The one service where respondents would prefer to pay someone to deliver is developing/improving a website.

Cost is the biggest barrier to accessing support (63%). There are also barriers relating to information about what's available (48%) and provision of local services (40%). 36% of respondents say they are too busy to access support.

Career satisfaction

15% rated their career satisfaction as 10/10 and 54% as at least 8/10. The top 5 factors for career satisfaction revolved around making rather than more practical motivations with being creative (91%), doing what I love (83%) and working with my hands (80%) the highest. For a single choice about which of these was most important, this was being creative (47%), doing what I love (19%) and working from home (9%).

Creative aspirations

The biggest creative ambition was to develop more opportunities to exhibit (66%). 60% of the makers had an ambition to be more ambitious conceptually and 58% to develop their technical skills.

Creative support services

The support that over half of respondents identify is introductions to curators/gallery owners (56%) which links to the desire to develop more exhibiting opportunities. Half of respondents are interested in peer mentoring/support and 48% in critical feedback. 42% are interested in a maker network.

The barriers to accessing support to realise creative ambitions are the same as accessing business support – cost, availability (or awareness of availability) and being too busy.

Relationship with Craft Scotland

Unlike previous research studies, this survey reached out beyond the Craft Scotland immediate network. As a result the survey reached a number of makers who had not engaged with Craft Scotland and who were more likely to have engaged with a guild or network. Craft Scotland could work more closely with other networks/guilds to forge new relationships with makers and extend our reach.

Relationship brokering

The makers in the survey were looking for access to increased exhibition opportunities, to make contact with exhibitors and to gain feedback on their work. Craft Scotland could take a lead on this and set up sessions where makers can meet curators and exhibitors with individual feedback provided as a part of this. This would also address the interest in meeting other makers. These sessions could be offered on a regional basis or in association with a network/guild.

Sales channels

75% of makers in the survey used online channels to sell their work, however these channels were only the top source of income for 20%. Online sales as a proportion of maker's UK retail sales has grown from 3% (2006) to 22% (2019) showing the importance of these channels. The effective use of online channels requires regular knowledge and skills updates to ensure that the seller is legally compliant and prominent and effective within the marketplace. It also demands regular content updates including aspects such as product photography. A suite of resources could be sourced and collated to support makers in this activity.

Business development

Both cost and lack of time are barriers to the development of skills that makers identify as important for their business development. Makers identify a need for increased promotion but are more interested in developing skills themselves than paying a professional. Despite this the elements of their work that provide the most satisfaction are very strongly the creative aspects not those related to business skills. There is a catch-22 in that there is the potential for increased income from investment in sales channels and promotion but net income is low which restricts investment potential.

Training and professional development

Cost is a barrier for training. In addition to the direct cost of the training, taking time out of standard business hours to attend has a knock-on effect in terms of lost income especially when travelling time is factored in for rural based makers. Craft Scotland should consider how best to deploy training and professional development opportunities to make them efficient for makers. This might mean that webinars or digital resources are developed that makers can work though at their convenience or that more targeted and specific opportunities are used such as mentoring or 1:1 clinics. Piggy backing short training or development sessions onto other activities (such as network/guild meetings) could be time efficient for makers.

Health within the sector

The snapshot identifies that 1 in 6 of makers have a mental health condition and 8% a cognitive or learning disability. Craft Scotland should consider how best to support wellbeing in the sector and how to support makers who may experience additional barriers for example in completing application forms or participating in group sessions and networking.

Craft Scotland

Supporting Makers, Promoting Craft

Craft Scotland is the national development agency for craft.

We put makers at the heart of all we do, championing diverse and high-quality contemporary craft.

We help people learn about, appreciate and buy craft, promoting the contribution of craft to Scotland's cultural, economic and social well-being.

Through our exhibitions and events programmes, digital platforms and strategic partnerships, we provide leadership for the sector.

We create opportunities for makers to develop their creative and business practice, and to exhibit and sell work in Scotland and beyond.

We are a registered charity supported by Creative Scotland.

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