



Craft Scotland Sector Report 2023

Prepared by EKOS

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Contents

1	Foreword	3
2	Introduction	5
2.1	Background/Context	5
2.2	Method	6
2.3	Report Structure	6
3	Policy and Strategy Context	7
3.1	National Policy	7
3.2	Sector Strategies	9
4	Economic Performance	11
4.1	Definition and Limitations	11
4.2	Growth Sector Statistics	13
4.3	Businesses	14
4.4	Employment	17
4.5	Economic Output	20
4.6	Earnings	23
4.7	Domestic Markets	23
4.8	Higher and Further Education	25
4.9	Regular Funded Organisations	26
5	Maker Survey 2022	28
5.1	Profile of Respondents	28
5.2	Craft Work of Respondents	29
5.3	Income from Craft Work	31
5.4	Views of the Craft Sector	36
5.5	Net Zero	38
5.6	Fair Work	39
5.7	Impact of Coronavirus (COVID-19)	39
5.8	Impact of External Factors	42
5.9	The Future of the Craft Sector	44
5.10	Support	44
5.11	Role of Craft Scotland	46

6	Stakeholder Feedback	48
6.1	The sector and its contribution to Scotland	48
6.2	Areas of opportunity	50
6.3	Challenges	51
6.4	Future needs and priorities for the sector	52
6.5	Policy Drivers	53
7	Conclusions	54

1 Foreword

As the national development agency for contemporary craft, Craft Scotland is committed to deepening public understanding of the value and benefits of craft through research and advocacy. Alongside research insights, we consult with the sector and identify clear areas of support and investment required.

In 2022, we commissioned EKOS, an independent consultancy specialising in economic and social evidence-based research, to provide a detailed analysis of the craft landscape since 2019. For the first time, we now have the strategic, economic and policy context to support the Scottish craft sector. The Craft Scotland Sector Report 2023 provides an evidence base for understanding the craft sector's context, working models and finances, it contextualises the sector's successes and challenges, weaving together new statistics with insights from previous Craft Scotland research to create a holistic picture of the sector.

It is heartening to see the craft sector in Scotland continue to display positivity, adaptability, and resilience. We know that Scotland's craft sector and talented makers are internationally renowned and craft is enjoyed by an estimated 3.2 million consumers as evidenced in previous joint-research [The Market for Craft](#) by the Crafts Council and eight partners including Craft Scotland. Yet, Scottish craft's future is not guaranteed, as external factors like funding, Brexit, the pandemic, and the cost-of-living crisis have negatively affected the sector's income and confidence.

The report identifies craft as a key growth sector within Scotland's creative industries, contributing a significant £67.3 million to the economy. However, less than 50% of craft makers earned a living solely through their craft, with a staggering 77% reporting earnings under £19,999.

One notable challenge is the lack of consensus on what precisely constitutes 'craft'. Divergent definitions across different national statistical, governmental bodies and funding entities complicate efforts to categorise and measure the craft sector's impact.

Another challenge highlighted in the report is the constraints of data collection methods, particularly the exclusive reliance on VAT-registered companies. This further results in an incomplete representation of the Scottish craft sector's economic contributions, as many craft professionals operate as sole traders with earnings below the VAT threshold.

Alongside macro challenges, the report also shows issues faced by makers are multifaceted. Makers express a pressing need for financial support, with 64% seeking assistance in acquiring craft equipment, undergoing further training, securing suitable workspaces, and expanding their businesses for increased income generation. They also express a strong desire for support in showcasing their work (64%) and marketing (59%) respectively seeking assistance in these areas. Moreover, 56% of makers need business advice to bolster their entrepreneurial efforts. Global opportunities are deemed vital for the future development of craft practices by a substantial portion of makers (75%), underscoring the sector's adaptability and global outlook.

Additionally, the lack of affordable facilities, studios, and infrastructure poses a significant hurdle to craft business development and limits the sector's accessibility and visibility within communities. The report highlights further work must be done in supporting diverse voices to flourish in the craft

sector. Furthermore, the instability of funding for craft organisations and initiatives creates difficulties in planning for long-term support and sustainable growth within the sector.

Despite the sector's challenges, there is an undeniable potential for growth and a path forward in an evolving economic and policy landscape. Makers play a pivotal role in advocating for craft's role in society, interweaving craft with key areas of national policy including community wellbeing and placemaking, innovation and education. Makers contribute significantly to local economies and communities, for example, 39% of makers source their income within their own local authority region.

This survey is not just a reflection on the present; it is a call to action for the future. We must recognise the true worth of this sector, address its challenges, and collectively work towards a brighter future for the Scottish craft sector. Craft Scotland remains dedicated to advocating for investment, providing targeted support, and celebrating the extraordinary craft community that enriches our lives.

Irene Kernan

Director, Craft Scotland

2 Introduction

2.1 Background/Context

This report sets out the findings of research commissioned by Craft Scotland to provide a detailed analysis of the craft sector in Scotland.

Craft Scotland is the national development agency for the craft sector, supporting makers and championing contemporary craft. As the sector emerges from the pandemic, Craft Scotland has identified a need to take stock of the economic contribution of the sector and inform future support needs.

As such, Craft Scotland commissioned EKOS to undertake a study which builds on previous sector surveys including their own research with a focus on economic measures as well as comparative analysis of the economic scale and structure of craft with that of other sectors of the economy. A key objective of the study was to explore issues such as the diversity of the sector, its contribution to local economies and to community wellbeing, and the impacts of the cost of living.

The findings from this research will feed into Craft Scotland's Strategic Plan 2025-28 and upcoming programme of support.

2.2 Method

The methodology comprised a mix of secondary and primary research, as illustrated in **Figure 1.1**, and detailed in **Table 1.1**.

Figure 1.1: Research Method

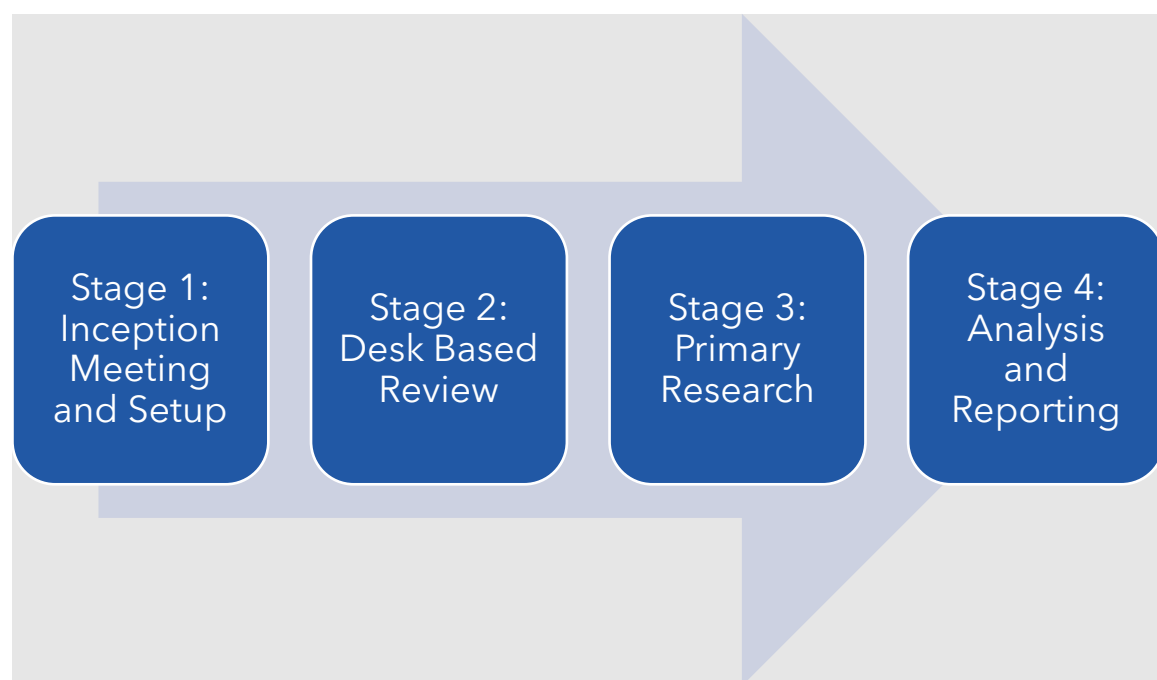


Table 1.1: Secondary and Primary Research

Method	
Secondary Research	<ul style="list-style-type: none">• Review of economic data from a range of sources including Office for National Statistics and Scottish Annual Business Statistics.• Policy and strategy review of the craft sector (e.g., economic and sectoral strategies).
Primary Research	<ul style="list-style-type: none">• An online survey of makers which attracted 158 responses.• Six consultations with key stakeholders.

2.3 Report Structure

The remainder of the report is structured as follows:

- Chapter 2 provides some policy and strategic context for the study and the sector;
- Chapter 3 analyses economic data on the sector;
- Chapter 4 reports the findings of the makers' survey;
- Chapter 5 summarises feedback from the stakeholder consultations; and
- Chapter 6 presents our conclusions.

3 Policy and Strategy Context

This Chapter sets out the strategic and policy context for the research. It should be noted that national policies tend to refer to creative industries as a whole. Where there is specific reference to craft sector, this has been highlighted.

3.1 National Policy

The creative industries have long been recognised as a key growth sector for Scotland. This was reinforced in the Scottish Government's 2019 [Policy Statement on the Creative Industries](#), which set out a series of priorities around business support, innovation, internationalisation, skills and inclusiveness. One of these priorities makes specific reference to the craft sector stating the importance of developing and retaining traditional craft skills as well as “promoting these within a modern and digital context, and internationally”¹.

For example, it is recognised that craft viability varies vastly within Scotland. The Heritage Craft Association's (2021) [Red List of Endangered Crafts](#) highlights that 130 craft are at risk of becoming extinct within the United Kingdom, with 56 of these identified as being critically endangered. These skills and corresponding intangible culture provide the foundation for the practice and work of some contemporary craft makers.

The skills context is also defined by the [Creative Industries Skills Investment Plan](#), published by Skills Development Scotland in 2015, which identifies a range of priority actions to improve diversity in the workforce, develop the talent and skills pipeline and career pathways, and develop business and leadership skills across the sector.

In early 2020, following an extensive consultation, the Scottish Government launched a [Culture Strategy for Scotland](#). Taking a broad view of culture and its role in modern society, the strategy sets out a range of priorities around three themes of strengthening culture, transforming through culture and empowering through culture. There is a strong emphasis on Fair Work and on inclusiveness and diversity in the cultural workforce. The strategy recognises the often difficult working conditions for many in the sector (low paid and insecure work), pledges action to promote and apply Fair Work principles across the arts and cultural industries.

In relation to meeting Scotland's net zero targets, the Culture Strategy highlights the sector's potential to galvanise climate action and influence behaviour change, through supporting communication and engagement with people and communities, noting that much culture and heritage work is already local and place-based.

¹ Scottish Government (2019) [Policy Statement on the Creative Industries](#), pg. 5

Scotland's [National Performance Framework](#) – which is used nationally to inform policy making and to measure progress across all areas of the economy and society – includes culture as one of its 11 national outcomes. The vision presented is for a “a vibrant, modern country with a strong tradition of investment in the arts and creativity. We have world renowned festivals, music and film industries and a rich seam of storytelling and visual art which stretches back hundreds of years. In this Outcome we honour, celebrate and support our creative talent in all its wonderful diversity.”

The specific measures used to assess the progress of this outcome are cultural attendance; cultural participation; creative industries Gross Value Added (GVA); and creative industries employment.

As the Coronavirus (COVID-19) pandemic hit, the policy conversation quickly moved towards resilience and recovery with recognition that the creative industries could have an important role to play. The report of the [Scottish Government's Advisory Group on Economic Recovery](#), recognises both the disproportionate impact on parts of the sector as a result of the pandemic and also the critical role that the creative sector can play in economic recovery. It calls for prioritisation of the sector post-Coronavirus (COVID-19) pandemic and action to support its recovery through investment in areas such as physical infrastructure and skills.

In March 2022, the Scottish Government published a new economic strategy, the [National Strategy for Economic Transformation](#), setting out priorities for Scotland's economy over the next ten years. Creative industries, alongside major events and tourism, is identified as a key sector and the importance of creative skills within a changing employment landscape is also recognised. The strategy highlights that the creative sector is well placed to “reap the benefits of a just transition” to a low/zero carbon economy, particularly through its well-established international reputation and expertise. Making the most of this opportunity will, however, require “a combination of early action and investment”.

This has superseded Scotland's [previous economic strategy](#), published in 2015 which identified six key growth sectors where Scotland has a distinct comparative advantage: food and drink (including agriculture and fisheries); creative industries (including digital); sustainable tourism; energy (including renewables); financial and business services; life sciences.

Data tracking the performance of the six key sectors has been published annually and has been a key measure for the performance of the creative industries² - see **Chapter 3.2** for a summary of this data. However, this publication is set to be reviewed in light of the new economic strategy, which identifies 14 “current and future key industries”: renewables; hydrogen; high value manufacturing; space; circular economy; blue economy; sustainable farming and forestry, nature restoration, eco-tourism; financial services and fintech; industrial biotechnology; photonics and quantum technologies; digital technology; life sciences; food and drink innovation; and creative industries, major events and tourism.

² Scottish Government, [Growth Sector Statistics](#)

Overall, the national policy context remains highly supportive of the wider creative sector, in which craft has an important role to play. In addition to long standing recognition of the growth potential of the sector, policy direction also emphasises the important role of the creative industries in supporting post-Coronavirus (COVID-19) economic and social recovery, particularly in relation to wellbeing, and the journey to net zero which are particular strengths of the craft sector.

3.2 Sector Strategies

In 2017, the [Creative Industries Leadership Group](#) (CIAG) was established to “advise Scottish Ministers on how to support, grow and realise the potential of Scotland’s creative industries”³. CIAG aims to ensure that the creative industries sector can “support our economy, with fair work at its heart, economic growth, net zero targets and wellbeing”. The Scottish Government states that Scotland’s creative industries offer a distinct comparative advantage.

Creative Scotland published their [Annual Plan 2022/23](#), which set out a range of aims, actions and priorities surrounding the creative industries. The priorities of this plan fall into four categories:

- Equalities, Diversity and Inclusion
- Sustainable Development
- Fair Work
- International

Creative Scotland seeks further support for people working within the creative industries, with a focus on the accessibility of art and creative activities for people from all parts of society⁴.

³ The Scottish Government. 2022. [Creative Industries Leadership Group](#).

⁴ Creative Scotland. 2022. [Action Plan 2022/23](#).

In order to achieve their aims, Creative Scotland has developed various actions which align with their priorities. They state that they will commit to:

- Increasing the diversity of who receives and benefits from support;
- Ensuring all support contributes to fair pay, conditions, and employment opportunities;
- Significantly reducing the environmental impact of Creative Scotland's work and those they support;
- Responding to local contexts, promoting artistic development and business sustainability across all parts of Scotland; and
- Building on Creative Scotland's existing support for international collaboration and artistic exchange⁵.

⁵ Creative Scotland. 2022. [Action Plan 2022/23](#).

4 Economic Performance

This chapter presents a detailed analysis of the current position of the craft sector in Scotland, considering economic performance, key organisations, and higher and further education activity.

4.1 Definition and Limitations

We have adopted the Scottish Government's definition of "Crafts and Antiques", one of the sixteen sub-sectors within the wider creative industries definition (**Appendix A**)⁶. Within our analysis we have also examined other sub-sectors of the creative industries from this definition, including visual arts; fashion and textiles; writing and publishing; music; and design. These sectors were agreed with Craft Scotland as relevant sectors which allows for comparison and analysis of the relative performance of the craft sector.

Adopting a standard definition ensures consistent analysis across the various available data sources, albeit with the following important caveats:

- the majority of the workforce within the sector is known to be self-employed or freelance, and therefore not captured in standard measures of sectoral employment (self-employed individuals whose income falls below the VAT threshold of £85,000 are not included⁷). While more expansive data is held by HMRC, this is not published or available for research; and
- there are significant challenges with categorising the sector using Standard Industrial Classification (SIC) codes. The Scottish Government defines the Crafts and Antiques sector using 10 SIC codes, on a "best fit" basis, with the wider creative industries defined using 16 sub-sectors and around 50 SIC codes – definition of Crafts and Antiques is below in **Table 3.1** while the wider creative industries definition is in **Appendix A**.
- the definition of Crafts and Antiques used in official statistics differs to the standard definition used by Craft Scotland and is broader encompassing a greater proportion of manufacturing.

⁶ The Scottish Government (2019) [Policy Statement for the Creative Industries](#).

⁷ nesta Creative Industries Policy and Evidence Centre (2021) [Plugging the Data Gap: Freelance Workers in the Creative Industries](#)

Table 3.1: Crafts and Antiques Definition by Standard Industrial Classification (SIC) Codes

SIC 2007	Examples of activity
Manufacture of other furniture	Includes finishing of furniture (e.g., upholstery of chairs, spraying, painting, French polishing)
Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting	Includes: manufacture of basket-ware and wickerwork; wooden statuettes and ornaments, wood marquetry, inlaid wood; manufacture of wooden mirror and picture frames; wooden cases for jewellery; wooden spools, cops, bobbins, sewing thread reels and similar articles of turned wood.
Manufacture of jewellery and related articles	Includes: production of worked pearls; production of precious and semi-precious stones in the worked state; working of diamonds; manufacture of jewellery of precious metal or of base metals clad with precious metals; manufacture of goldsmiths' articles of precious metals or of base metals clad with precious metals.
Manufacture of imitation jewellery and related articles	Includes: manufacture of costume or imitation jewellery e.g., rings, bracelets, necklaces, and similar articles of jewellery made from base metals plated with precious metals and jewellery containing imitation stones.
Manufacture of ceramic household and ornamental articles	Includes: manufacture of ceramic tableware and other domestic or toilet articles; manufacture of statuettes and other ornamental ceramic articles.
Manufacture of other ceramic products	Includes: manufacture of ceramic pots, jars and similar articles of a kind used for conveyance or packing of goods; manufacture of ceramic products not elsewhere classified.
Manufacture of hollow glass	Includes: manufacture of bottles and other containers of glass or crystal; manufacture of drinking glasses and other domestic glass or crystal articles
Manufacture and processing of other glass, including technical glassware	Includes: manufacture of glass figurines manufacture of glassware used in imitation jewellery; manufacture of clock or watch glasses, optical glass and optical elements not optically worked.
Retail sale of antiques including antique books, in stores	Includes: retail sale of antiques, antique books, and activities of auctioning houses.
Repair of furniture and home furnishings	Includes: reupholstering, refinishing, repairing and restoring of furniture and home furnishings.

4.2 Growth Sector Statistics

The Scottish Government publishes data each year tracking the performance of the six key sectors identified in Scotland's Economic Strategy (2015), drawn from Office for National Statistics (ONS) data. This provides the main measure of performance of craft and the wider creative industries in Scotland – each of these indicators, as well as their recent trends, are analysed in greater detail throughout this chapter.

The most recent iteration of the Growth Sector Statistics was published in March 2022 and shows the Crafts and Antiques sector contributed **£67.3m** in Gross Value Added (GVA) to the Scottish economy in 2020⁸. The sector also accounted for at least 2,030 jobs in 2021 (2.6% of the creative industries total) and 390 businesses (3.0% of creative industries, **Table 3.2**).

Table 3.2: Craft Sector - Scale and Structure

	Employment (2021)	Business Base (2022)	Total Turnover (2020)	GVA at basic prices (£millions) (2020)	GVA per head (2020)
Crafts and Antiques	2,030	390	£175m	£67.3m	£34,860
Visual Arts	1,010	510	£106.2m	£70.8m	£71,853
Fashion and Textiles	3,020	370	£200.5m	£88.5m	£36,446
Writing and Publishing	6,660	995	£535.7m	£279.8m	£37,335
Music	270	185	£19.3m	£8.2m	£23,215
Design	7,630	1,790	£1,633m	£468.7m	£68,664
Creative Industries – total	78,170	13,120	£7,907.6m	£4,379m	£55,959
Craft and Antiques % of Creative Industries total	2.6%	3.0%	2.2%	1.5%	N/A

Source: [Scottish Growth Sector Statistics](#). Data is for VAT/PAYE registered employers only. Employment and business figures have been rounded. Crafts and Antiques definition is provided in Appendix A1.

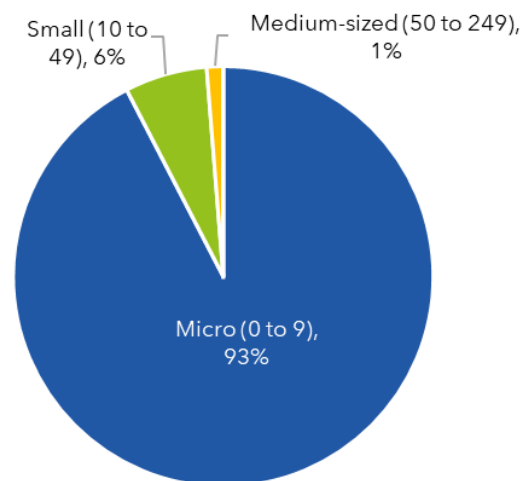
⁸ GVA is the difference between the value of goods and services produced and the cost of raw materials and other inputs, which are used up in production – a further detailed note and analysis is provided in Chapter 3.5.

4.3 Businesses

In 2022, there were **390 businesses** in the Crafts and Antiques sector in Scotland – this represents 3.0% of the total creative industries business base. The true figure is likely to be higher given the challenges with official statistics already noted above in Chapter 3.1.

In line with the wider creative industries, the vast majority of registered businesses in the craft sector are classed as micro-businesses (93%), employing under 10 staff (if any), **Figure 3.1**.

Figure 3.1: Business Base by Size (2022)



Source: UK Business Counts.

Looking at sub-sectoral level, “manufacture of other furniture” (which includes finishing of furniture e.g., upholstery, spraying, painting) is the largest subsector, accounting for 42% of the business base in 2022. This is followed by “manufacture of jewellery and related articles” and “retail sale of antiques” which both comprise under one-fifth of the total businesses in the craft sector (19%), **Appendix B3**.

Half of the registered craft businesses are located within seven local authorities (50%) with the most common in Glasgow City (13%); City of Edinburgh (10%); Fife and Highland (both 8%). The diverse nature of craft is evident as both urban centres and rural areas comprise similar proportions of the business base. It should be noted that this geographical analysis at sub-sectoral level is limited as the official data only captures VAT/PAYE registered businesses and, in some cases, the numbers at local authority level will be too statistically small to report.

Business Base Change

Using 2015 as a base year, the number of businesses in the craft sector was stable and experienced slight growth (+1%) in the pre-Coronavirus (COVID-19) period up to 2019 – this is similar to trends in visual arts and fashion and textiles while the wider creative industries experienced greater growth of 9% due to large increases in software and electronic publishing, **Tables 3.3** and **3.4**.

The annual data shows a 4% drop in the number of craft businesses between 2019 and 2020, equivalent to 15 fewer businesses. This may well be attributable to the pandemic and, apart from writing and publishing, this is a proportionately greater impact on craft than all the other comparator sectors and the creative industries as a whole. This illustrates how certain creative subsectors, particularly design and digital industries, were well-positioned to adapt to remote working and suffered less market disruption (and in some cases, opportunities to grow their market).

However, between 2020 and 2022, the number of businesses in the craft sector has “bounce-back” with growth of 8%, equivalent to 30 additional businesses at a national level. Therefore, craft has outperformed growth compared to all the other comparator sectors with the exception of music.

A few subsectors have contributed to this growth including: “manufacture of other furniture” (+20, +14%); “manufacture of jewellery and related articles” (+10, +15%); “manufacture of other products of wood; manufacture of articles of cork, straw and plaiting” (+5, +50%), **Appendix B3**. Albeit relatively small in absolute numbers, this spread of growth across different subsectors of craft is encouraging.

Geographic areas where craft is traditionally strong e.g., creative cities and rural areas have driven the growth since 2020. For example, the four largest local authorities in terms of craft businesses have experienced an increase over the period 2020 to 2022. These include: Glasgow City (+15, +43%); Fife (+10, +50%), City of Edinburgh (+5, +14%), and Highland (+5, +20%).

Table 3.3: Business Base (2015 – 2022)

	2015	2016	2017	2018	2019	2020	2021	2022	% of CI Total
Crafts and Antiques	370	375	365	365	375	360	375	390	3%
Visual art	485	505	510	490	490	490	490	510	4%
Fashion and textiles	355	365	365	360	370	370	360	370	3%
Design	2,260	2,265	2,190	2,095	2,135	2,145	1,985	1,790	14%
Music	160	165	165	155	155	155	175	185	1%
Writing and Publishing	1,105	1,080	1,070	1,045	1,045	995	990	995	8%
CI – Total	14,405	15,255	15,570	15,340	15,655	15,525	14,315	13,120	100%

Figures rounded to nearest 5. Source: UK Business Counts.

Table 3.4: Business Base Change

	2015-2022		2015-2019		2019-2020		2020-2022	
	Change	% Change	Change	% Change	Change	% Change	Change	% Change
Crafts and Antiques	+20	+5%	+5	+1%	-15	-4%	+30	+8%
Visual art	+25	+5%	+5	+1%	0	0%	+20	+4%
Fashion and textiles	+15	+4%	+15	+4%	0	0%	0	0%
Design	-470	-21%	-125	-6%	+10	+0.5%	-355	-17%
Music	+25	+16%	-5	-3%	0	0%	+30	+19%
Writing and Publishing	-110	-10%	-60	-5%	-50	-5%	0	0%
CI – Total	-1,285	-9%	+1,250	+9%	-130	-1%	-2,405	-15%

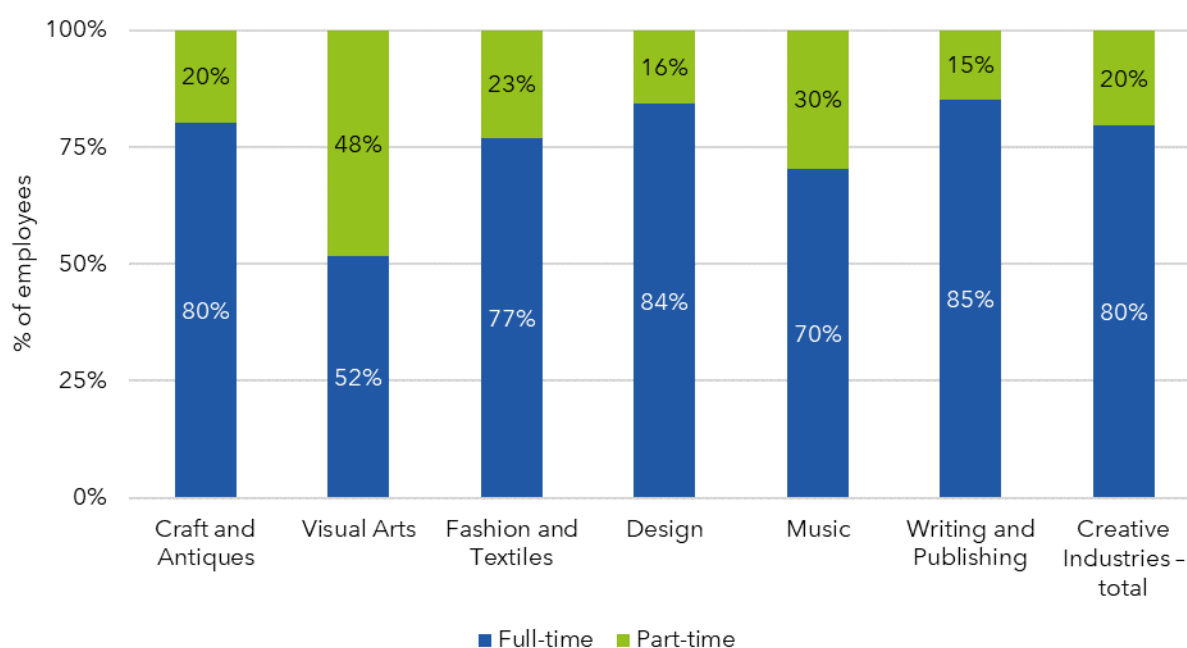
Figures rounded to nearest 5. Source: UK Business Counts.

4.4 Employment

While it is estimated that there are over 3,500 makers within the craft sector⁹, official statistics for 2022 recorded **2,030 people in employment** within the Crafts and Antiques sector in Scotland – this represents 2.6% of the total creative industries base, **Table 3.5**. Almost two-thirds of recorded employment is within manufacture of other furniture (62%) followed by retail sale of antiques (11%) and manufacture of jewellery and related articles (10%).

Although one-fifth of employees work on a part-time basis (20%), this is similar to the creative industries as a whole and much lower than comparator creative sectors such as Visual Arts (48%), **Figure 3.2**. In line with the other comparator creative sectors, the proportion of part-time employees has increased since 2015 (+7% compared to: visual arts +3%; fashion and textiles +7%; design: +4%; music +12%).

Figure 3.2: Employees by FT/PT split (2021)



Source: Business Register and Employment Survey

In slight contrast to the business base, craft employment tends to be more concentrated in urban centres with Glasgow City accounting for almost one-quarter of employment (23%) recorded in official data. This is followed by other Central Belt local authority areas of City of Edinburgh (8%), North Lanarkshire (8%), West Lothian (7%), and Renfrewshire (7%). However, the location profile of respondents to our Makers survey shows a more diverse spread of craft employment across Scotland (see Chapter 4.1).

⁹ Creative Scotland, [Craft Regular Funding 2018-21](#)

Employment Change

Using 2015 as a base year, there was pre-Coronavirus (COVID-19) pandemic growth in employment in craft in line with other creative subsectors albeit on a smaller scale (+3% growth from 2015 to 2019). Initially, the Coronavirus (COVID-19) pandemic, much like other sectors, appears to have been a significant factor in contracting the employment base by 15% in 12 months, equivalent to almost 350 people, **Table 3.6**.

Between 2019 and 2020, this was widespread, with half of local authority areas in Scotland experiencing a decrease in craft employment with the most severely impacted including: City of Edinburgh (-85, -41%); Perth and Kinross (-65, -45%); South Lanarkshire (-55, -42%); Glasgow City (-55, -11%); and Scottish Borders (-45, -69%). A few local authorities bucked this trend in relatively small absolute terms – these included Dundee City, Renfrewshire and West Dunbartonshire.

Over the last 12 months, the growth in craft employment (9%, 170 jobs) has contrasted with further decline in other subsectors such as music (-29%), writing and publishing (-8%), and visual art (-6%), suggesting a degree of resilience.

At a subsectoral level, the picture is mixed with the growth in employment being largely driven by “manufacture of other furniture”. For example, in the last 12 months, this subsector grew by 250 additional people (+25%) which offset decreases within: repair of furniture and home furnishings (-50,-40%); manufacture of jewellery and related articles (-25, -11%); and manufacture of imitation jewellery and related articles (-10, -22%), **Appendix B2**.

For Coronavirus (COVID-19) recovery, an encouraging aspect is that almost half of Scotland’s local authority areas experienced an annual increase in craft employment in 2021 with largest absolute increases for City of Edinburgh (+40, +33%), West Lothian (+40, +36%), and Renfrewshire (+25, +26%).

In particular, it is worth noting that Renfrewshire has shown consistent employment growth over the whole analysis period even accounting for the impact of Coronavirus (COVID-19). The context of Renfrewshire adopting a central focus on cultural regeneration, particularly around Paisley Museum and Art Gallery, should be considered and may have had a positive effect on the craft sector in the area. Opportunities to further develop and formalise the links between craft and placemaking in other areas throughout Scotland would be valuable (although may require significant resource).

Table 3.5: Employment (2015 – 2021)

	2015	2016	2017	2018	2019	2020	2021	% of CI Total
Crafts and Antiques	2,140	2,830	2,350	2,660	2,200	1,860	2,030	2.3%
Visual art	1,200	1,680	1,160	1,300	1,400	1,080	1,010	1.3%
Fashion and textiles	2,320	3,090	2,590	2,380	2,820	2,330	3,020	3.9%
Design	5,810	7,690	6,690	6,500	7,690	6,690	7,630	9.8%
Music	380	450	510	360	400	380	270	0.3%
Writing and Publishing	9,300	9,500	8,240	9,500	9,400	7,270	6,660	8.5%
CI – Total	72,670	83,680	77,140	86,630	89,640	86,630	78,170	100%

Figures rounded to nearest 10. Source: Business Register and Employment Survey

Table 3.6: Employment Change

	2015-2021		2015-2019		2019-2020		2020-2021	
	Change	% Change	Change	% Change	Change	% Change	Change	% Change
Crafts and Antiques	-110	-5%	+60	+3%	-340	-15%	+170	+9%
Visual art	-190	-16%	+200	+17%	-320	-23%	-70	-6%
Fashion and textiles	+700	+30%	+500	+22%	-490	-17%	+690	+30%
Design	+1,820	+31%	+1,880	+32%	-1,000	-13%	+940	+14%
Music	-110	-29%	+20	+5%	-20	-5%	-110	-29%
Writing and Publishing	-2,640	-28%	+100	+1%	-2,130	-23%	-610	-8%
CI – Total	+5,500	+8%	+16,970	+23%	-3,010	-3%	-8,460	-10%

Figures rounded to nearest 10. Source: Business Register and Employment Survey.

4.5 Economic Output

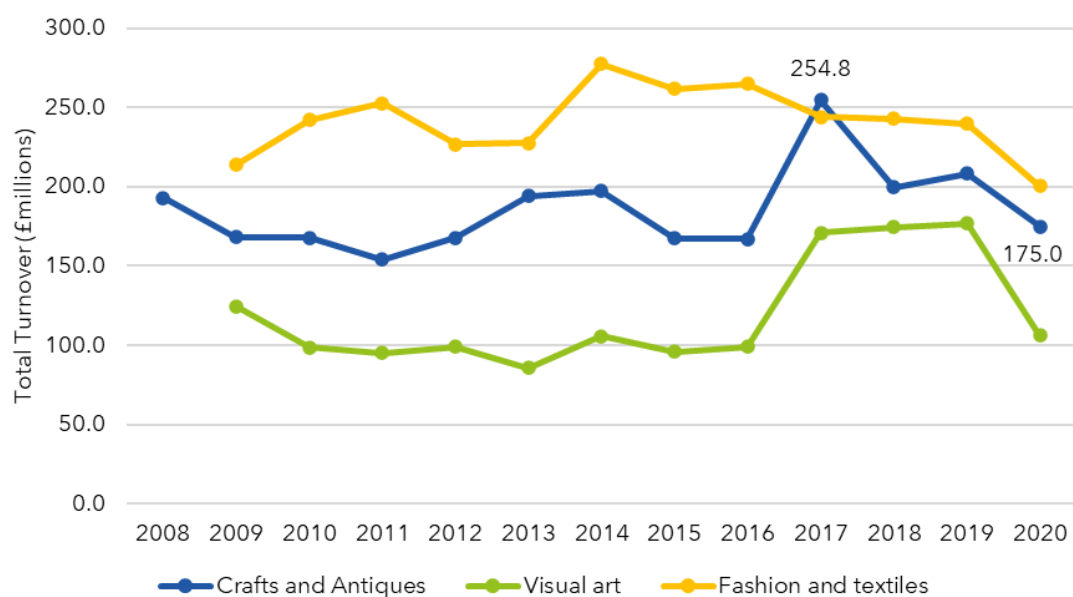
Figure 3.3 highlights the total turnover of the Crafts and Antiques sub-sector from 2008-2020 (available data) with comparison to other similarly sized creative subsectors. In 2020, total turnover in the Crafts and Antiques sector was recorded as £175 million accounting for 2.2% of CI's total turnover. This was greater than turnover in Visual Arts (£106.2m) but less than Fashion and Textiles (£200.5m).

Between 2008 and 2020, the most significant peak in Crafts and Antiques turnover occurred in 2017, with a £87.9 million increase from 2016. However, the peak appears to be the anomaly in the trend data as turnover falls by £55.1 million and returns to a broadly similar level as before 2017– it is unclear what caused this annual spike which occurred across the creative industries.

Unsurprisingly, there was a notable drop in turnover from 2019 to 2020 of £33.5 million (-16%). This was expected due to the Coronavirus (COVID-19) pandemic causing the closure of businesses during the height of Government restrictions and is broadly in line with the declining trends in turnover experienced in comparator sectors (although less severe than -40% reduction in visual art turnover). On the whole, total turnover in creative industries decreased by 7% from 2019 to 2020 – this was lower than the 15% drop across all sectors in Scotland.

It remains to be seen whether the “bounce-back” in craft employment and business bases translates to a return to pre-pandemic (or greater) levels of turnover. Given that some large-scale events (often significant financial contributors for craft makers) are only beginning to return to pre-pandemic scale, it is likely that there will be some turnover growth. However, this may be complicated or limited by various ongoing crises including cost of living and materials.

Figure 3.3: Total Turnover (2008–2020)



Note: 2008 figures unavailable for visual art, and fashion and textiles. Source: Scottish Annual Business Statistics.

Gross Value Added

Gross Value Added (GVA) is a key indicator of the state of the economy and gives a picture of the state of economic activity from the supply side perspective¹⁰. It measures the contribution to the economy of each individual producer, industry or sector in Scotland and is used in the estimation of GDP. GVA is the difference between the value of goods and services produced and the cost of raw materials and other inputs, which are used up in production.

In the context of the Coronavirus (COVID-19) pandemic and restrictions, the Crafts and Antiques sector in Scotland contributed £67.3m of GVA in 2020, **Figure 3.4**. Compared to 2019, this represented a substantial annual drop of over one-third (37%), equivalent to £38.8m. Prior to Coronavirus (COVID-19), GVA of the craft sector was steadily growing from 2012 and had almost doubled from 2012 to 2019 (+87%).

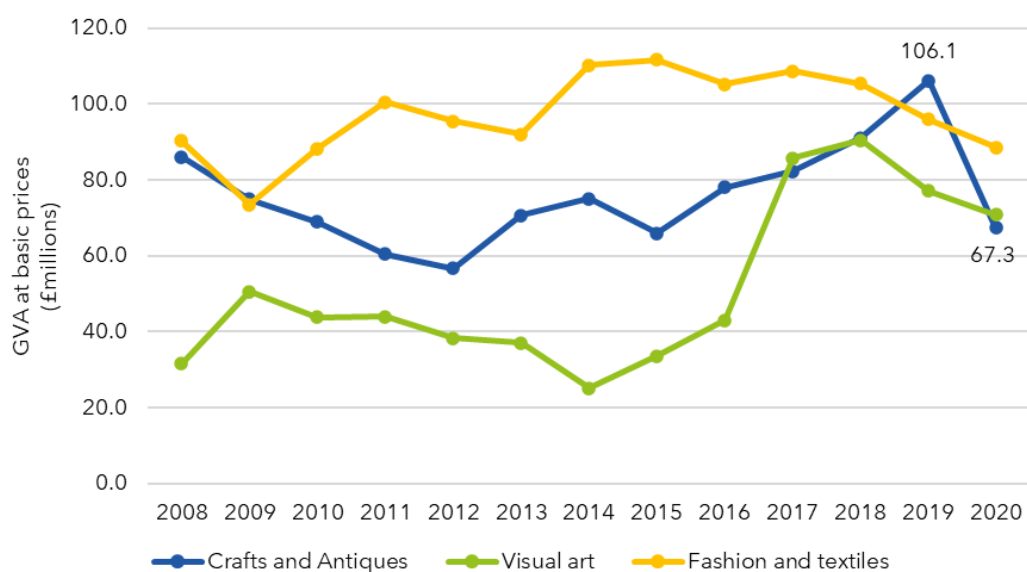
The impact of the Coronavirus (COVID-19) pandemic on economic output is particularly pronounced for the craft sector (-37%) as most of the other comparator creative subsectors experienced much smaller annual decreases (visual art: -8%; fashion and textiles: 8%; design: -12%).

¹⁰ Scottish Parliament, [A Guide to GVA in Scotland](#) (2018)

As other sub-sectors, such as digital industries, adapted well to remote working and suffered less market disruption, the creative industries as a whole experienced a 3% annual rise in GVA for 2020.

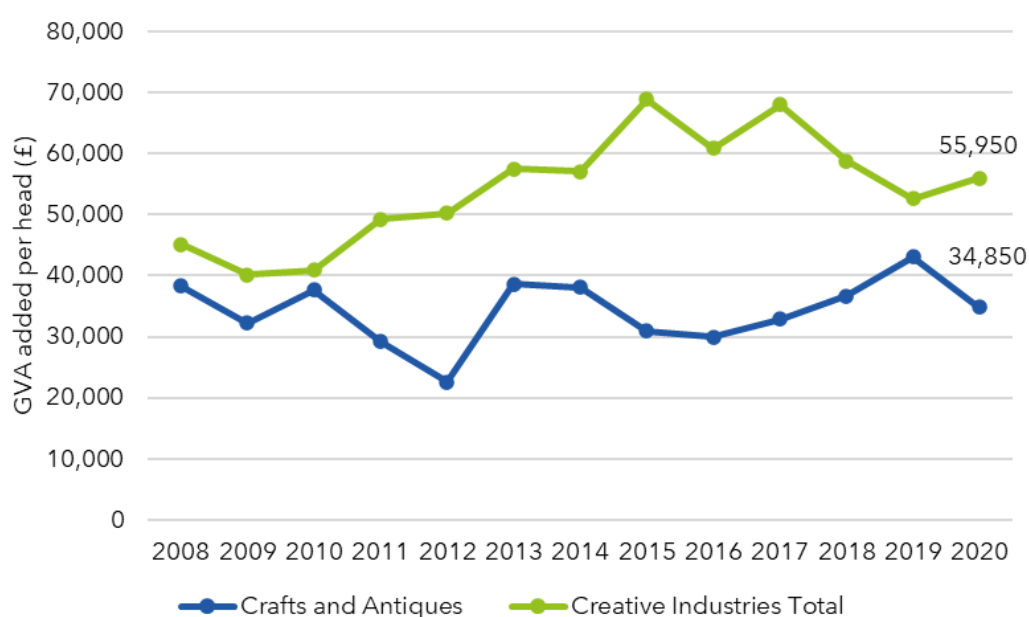
While craft represents 2.6% of all creative sector employment across Scotland and 3.7% of all businesses, it accounts for a lower proportions of turnover (2.2%) and GVA (1.5%). This indicates lower productivity (GVA per head) within the craft sector, particularly in comparison to other creative sectors such as design and the digital industries.

Figure 3.4: GVA (2008–2020)



Source: Scottish Annual Business Statistics

Figure 3.5: GVA per head (2008–2020)



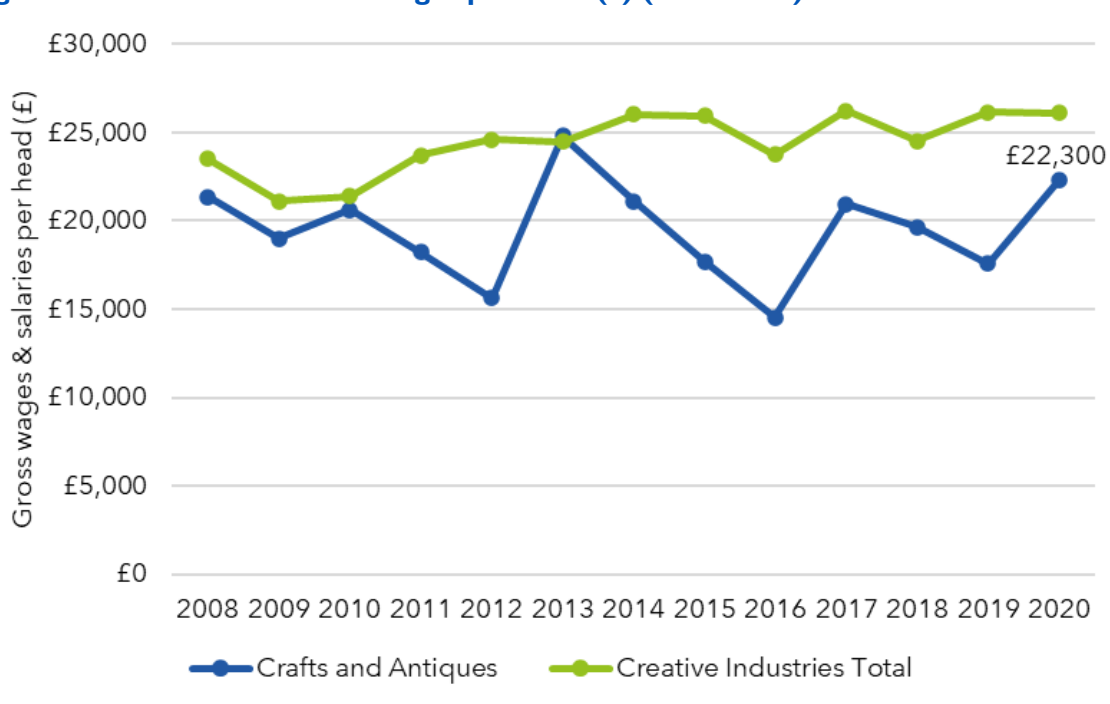
Source: Scottish Annual Business Statistics

4.6 Earnings

In 2020, the gross wage and salary per head of the Crafts and Antiques sector was £22,300 – slightly higher than visual arts (£21,900) and fashion and textiles (£19,800) but lower than £26,100 for creative industries as a whole and £23,200 across all sectors.

Figure 3.6 shows the gross wages and salaries per head within craft from 2008-2020. Earnings within the Crafts and Antiques sub-sector have faced various peaks and troughs over the years which follow a similar trend to the creative industries as a whole only slightly more pronounced.

Figure 3.6: Gross salaries and wages per head (£) (2008-2020)



Source: Scottish Annual Business Statistics

4.7 Domestic Markets

In 2020, the Crafts Council published a UK-wide report into [The Market for Craft](#). Given the relative size of the countries, craft in Scotland accounted for 9% of the UK's volume of sales and 6% of the value of total craft sales in the UK in 2020 which is broadly proportionate, **Table 3.7**. This illustrates the findings from the stakeholder interviews that Scotland is a relatively small domestic market.

At a UK level, textiles in Scotland is the largest proportionate contributor to its subsector total value demonstrating its relative strength and competitive strength of provenance and authenticity.

Table 3.7: Volume and value of Scotland's craft sector by discipline (2020)

	Volume of craft sales	% of UK total	Value of craft sales	% of UK total
Total	2,600,000	9%	£198,000,000	6%
Ceramic	553,000	10%	£37,000,000	7%
Glass	291,000	8%	£14,000,000	3%
Wood	524,000	11%	£42,000,000	6%
Jewellery	630,000	9%	£53,000,000	5%
Textiles	466,000	8%	£42,000,000	11%
Metalwork	142,000	6%	£10,000,000	4%

Figures have been rounded. Source: Table 5 in Crafts Council (2020) [The Market for Craft](#).

The report also found that there were 3.2 million buyers in Scotland in 2020 with a further 734,000 potential buyers giving a total market of 3.9 million in Scotland. For Scottish makers, there is also potential access to almost 38 million buyers at a UK-wide level. Another finding of the report was that 72% of Scotland's adult population have bought craft.

It should be noted that the craft subsectors used within The Market for Craft report are different to the craft subsectors and definitions used within the economic analysis of this report.

4.8 Higher and Further Education

Across higher and further education, there were almost 17,600 students involved in “Arts and Crafts” in 2020/21, **Tables 3.8** and **3.9**. Total growth in higher education is driven by increases at Abertay University and the University of Edinburgh while there was a drop in students at Glasgow School of Art (-9%, equivalent to 130 fewer students).

Table 3.8: Number of Higher Education students in “design, and creative and performing arts”

	2019/20	2020/21	Change	% Change
The University of Edinburgh	1,625	1,800	+175	+11%
The University of Dundee	1,300	1,390	+90	+7%
Glasgow School of Art	1,395	1,265	-130	-9%
Royal Conservatoire of Scotland	1,025	1,110	+85	+8%
The University of Glasgow	1,125	1,095	-30	-3%
University of the Highlands and Islands	950	945	-5	-1%
Edinburgh Napier University	895	920	+25	+3%
Robert Gordon University	715	720	+5	+1%
The University of the West of Scotland	590	675	+85	+14%
Heriot-Watt University	675	665	-10	-1%
Queen Margaret University, Edinburgh	430	510	+80	+19%
Glasgow Caledonian University	380	390	+10	+3%
Abertay University	0	340	+340	*
The University of Aberdeen	245	235	-10	-4%
The Open University	120	175	+55	+46%
The University of Strathclyde	175	150	-25	-14%
The University of Stirling	90	25	-65	-72%
The University of St. Andrews	15	0	-15	-100%
Total	11,750	12,405	+655	+6%

* denotes figure not divisible by zero. Note: Gray’s School of Art is included within Robert Gordon University. Creative arts and design includes: fine art; design studies; music; drama; cinematics; craft; beauty and hairdressing; arts and design other; balanced combinations. Source: HESA

Data for further education allows analysis by course type which shows that the most attended courses are general by nature. It was noted by stakeholders that the City of Glasgow College was recently the only further education institution which offered an art glass course, however this has since closed. A similar lack of courses was reported for ceramics, an area of some concern.

Table 3.9: Number of Further Education Students in “Arts and Crafts” by Individual Superclass (2020/21)

	Number of students	% of total
Art Techniques/Practical Art	1,655	32%
Art Studies	1,465	28%
Design (non-industrial)	970	19%
Fashion/Textiles/Clothing (craft)	745	14%
Decorative Metal Crafts/Jewellery	145	3%
Arts and Crafts Leisure/Combined	110	2%
Glass/Ceramics/Stone Crafts	35	1%
Decorative Crafts	30	1%
Fabric Crafts/Soft Furnishings	25	0.5%
Wood Cane and Furniture Crafts	10	0.2%
Total	5,190	100%

Source: Scottish Funding Council [INFACT Database](#)

4.9 Regular Funded Organisations

Creative Scotland’s Regular Funding provides three-year funding support to a range and breadth of organisations that make a vital contribution to the current health and future development of the arts, screen and creative industries in Scotland. The current funding round (2018-21) consists of 121 organisations, of which 19 were new to the network.

There are four regular funded organisations (RFOs) in the craft sector, presented in **Table 3.10**.

Table 3.10: Craft RFOs

Organisation	Local Authority	Funding 2015-18	Funding 2018-21
Craft Scotland	City of Edinburgh	£975,900	£1,000,000
North Lands Creative Glass	Highland	£550,000	£650,000
Fife Contemporary	Fife	£300,000	£315,000
Panel	Glasgow City	-	£270,584
Total Regular Funding Awarded— 3 years (£)		£1,825,900	£2,235,584

Note: Local authority refers to where the organisation is based, however, activity can be wider e.g. Craft Scotland has a national and international reach. Source: Creative Scotland [Regular Funded Organisations 2018-2021](#)

In the most recent funding cycle, craft RFOs received over £2.2m in funding, with the largest single amount to Craft Scotland. Compared to the previous funding cycle, funding of craft organisations increased by 22%, largely due to the addition of Panel as an RFO (66% of increase) as well as increases to existing RFOs.

It should be noted that there are other RFOs which include “elements of craft in their programming, for example An Lanntair, Cove Park, Dundee Contemporary Arts, Shetland Arts Development Agency, The Barn, Atlas Arts, Peacock Visual Arts and Timespan”¹¹.

A new framework for regular funding is in the process of being implemented, with the 2018-2021 cohort continuing to receive funding to at least March 2024 in the meantime¹².

Summary

The creative industries in Scotland are defined according to 16 sub-sectors, which includes Crafts and Antiques, with statistics on the sector published each year. The definition of Crafts and Antiques subsector used in official statistics varies from typical definitions and includes broader elements of manufacturing. The most recent iteration of the Growth Sector Statistics, drawn from ONS data, was published in March 2022, and shows the Crafts and Antiques sector contributed £67.3m to Scotland’s economy in 2020. The sector accounted for 2,030 jobs in 2021 (2.6% of the creative industries total) and 390 businesses (3.0% of creative industries total).

Although providing a comparable source of data that can be used to track performance across different years and between different regions, it is well understood that this data underestimates the extent of the craft sector, where a large proportion of the workforce are known to be self-employed or freelance (99% of registered businesses in craft are micro-or small), and therefore not captured in standard measures of sectoral employment.

While craft and antiques has been particularly impacted by the Coronavirus (COVID-19) pandemic, particularly in terms of the drop in economic output (37% annual drop in GVA), there are positive signs of growth in craft employment and business bases compared to other creative subsectors.

It remains to be seen whether the “bounce-back” in craft employment and business bases translates to a return to pre-pandemic (or greater) levels of turnover. Given that some large-scale events (often significant financial contributors for craft makers) are only beginning to return to pre-pandemic scale, it is likely that there will be some uptick in turnover. However, this may be complicated or limited by various ongoing crises including cost of living and materials.

¹¹ Creative Scotland, [Craft - Regular Funding 2018-21](#)

¹² Creative Scotland, [Refreshed Strategy and Funding Framework](#) (2022 update)

5 Maker Survey 2022

Craft Scotland typically conduct a three-yearly survey of makers who operate within the sector. In late August 2022, the latest edition of the online survey was distributed by Craft Scotland and partners through mailing lists and social media channels.

The survey ran for three weeks closing on 26th September 2022 and attracted a total of **158 responses**.

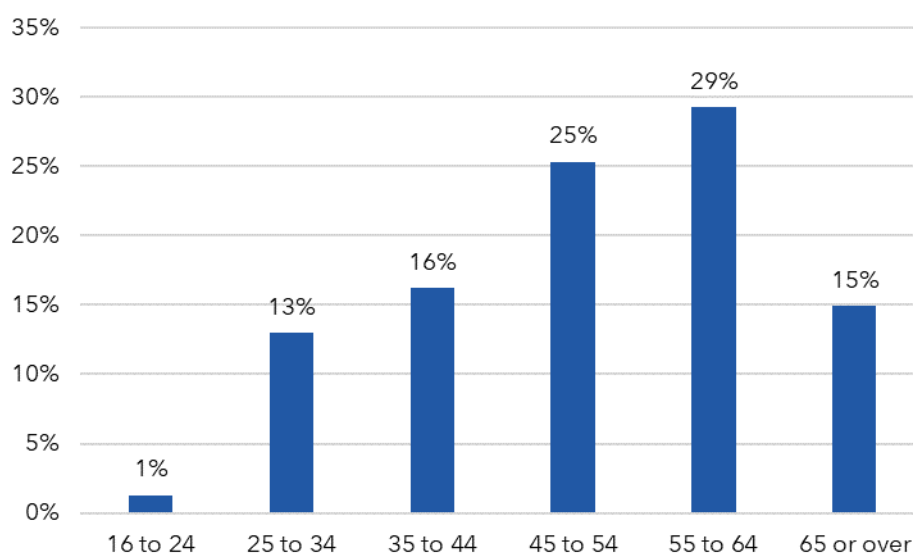
5.1 Profile of Respondents

With respondents located in 26 of the 32 local authority areas, respondents were well spread with the most common locations being City of Edinburgh (10%), Glasgow City (10%) and Highland (9%), **Table C.1**.

The vast majority of respondents to this survey identified as women (81%), with 13% identifying as men, and the final 6% self-identifying or not disclosing their gender.

A range of age groups contributed to this survey although just under half were aged 55 or over (44%), **Figure 4.1**.

Figure 4.1: Respondents by Age



N=154

Further equalities tables are presented in **Appendix C** and show that, in terms of ethnicity, diversity of respondents was relatively low with 93% of respondents being white (either white Scottish/British or white

other) with a few categories not represented, **Table C.2**. In terms of sexual orientation, 92% of respondents identified as straight/heterosexual, **Table C.3**.

5.2 Craft Work of Respondents

Maker respondents work across a diverse spread of disciplines with most common being textiles (32%), followed by jewellery (22%) and ceramics (22%), **Table 4.1**. More than a quarter of makers work in multiple craft disciplines (27%).

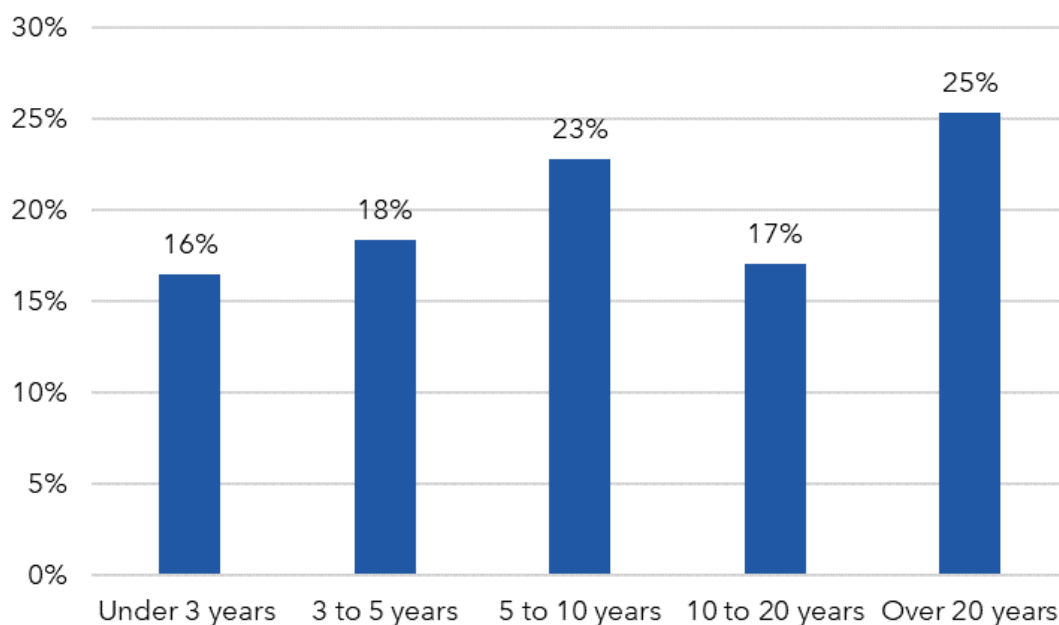
Table 4.1: Respondents by Craft Discipline

	%
Textiles	32%
Ceramics	22%
Jewellery	22%
Glass	14%
Other	14%
Wood Working	9%
Silversmithing and Goldsmithing	8%
Basketry and Willow Weaving	6%
Bookbinding	4%
Leather Working	4%
Furniture Making	3%
Metal Working	3%
Mosaics	3%
Stone Working	3%
Paper Making	2%
Millinery	1%

N=158. Multiple responses were possible. “Other” included: artist/fine art/painting; teacher; multi-form; mixed media; bear making; costume making; wool production and hand dyeing; marbling; enamel on precious metals; recycled materials; casting; and surface design and products.

Most respondents are well-established makers working within the craft industry for more than 10 years (42%) with one-quarter having worked as a professional craft maker for over 20 years – only 16% were established in the last three years, **Figure 4.2**.

Figure 4.2: How long have you been working professionally in the craft sector?



N=158

Reflecting the business base being predominantly comprised of very small businesses, more than half of respondents are sole traders (57%) with almost one-quarter of makers partaking in craft work on a part-time or occasional basis., **Table 4.2.**

Table 4.2: Which of the following best describes your craft work?

	%
Sole Trader (i.e. have your own company, with no other employees)	57%
Part-time/occasional activity (e.g., craft is not your main/ only income)	23%
Private Limited Company	6%
Freelancer (i.e. work on a contract-by-contract basis for others)	4%
Partnership	4%
Charity/ Not-for-profit/ voluntary/ community organisation	3%
Other	3%

N=158. Other included: retired/hobbyist who sells at markets; both sole trader and non-profit owner.

Less than one-fifth of respondents employ other people (18%).

The majority of respondents (82%) do not employ any staff members and work on their own, or with friends, family or partners. When asked why not, respondents mainly stated that this was because they could not afford it (35%), while some said they were a micro or sole trader business (26%), and others felt that having staff was unnecessary (18%).

5.3 Income from Craft Work

5.3.1 Proportion of Total Income from Craft

Of those surveyed, just over half responded that craft is their main source of income (53%). Makers in ceramics (63%), jewellery (59%), and silversmithing and goldsmithing (69%) were more likely to report that craft was their main source of income compared to textiles (55%) and glass (41%)

Of the makers who stated craft is not their main source of income, most respondents have another form of employment as their main source of income (55%), followed by pensions (15%).

Respondents were asked to select all activities which make up their craft-related income, **Table C.4**. The main income-related activities are:

- Making and selling contemporary objects (90%).
- Teaching craft in less formal groups (e.g., evening classes, workshops, etc.) (45%).
- Grants from trusts or public bodies (18%).
- Teaching or lecturing in art/craft/design at a further education or higher education institution (15%).
- Running/owning a craft initiative/venue/workspace (14%).

Over one-third of makers state that 80% to 100% of their total income came from craft-related income (38%) – jewellery and silversmithing and goldsmithing are above average in this regard, **Table 4.3**. The part-time and occasional activity within craft is evident with almost a third reporting that craft accounted for under one-fifth of their total income.

Table 4.3: What proportion of your total income is accounted for by your craft-related income?

	0% - 20%	20% - 40%	40% - 50%	50% - 60%	60% - 80%	80% - 100%
Total (n=156)	32%	10%	4%	4%	12%	38%
Ceramics (n=35)	31%	11%	6%	6%	11%	34%
Glass (n=22)	36%	9%	5%	5%	5%	41%
Jewellery (n=34)	24%	9%	3%	0%	9%	56%
Silversmithing and Goldsmithing (n=12)	25%	8%	0%	0%	8%	58%
Textiles (n=51)	27%	16%	2%	2%	12%	41%
Wood Working (n=14)	36%	7%	0%	7%	14%	36%

N refers to the base number of survey respondents. Note: Craft disciplines with 10 or above respondents are included.

Asked if this had changed when compared to prior to the pandemic, there was mixed feedback from makers with almost equal proportions stating that craft income now either accounted for an increased, similar or decreased proportion of their total income, **Table 4.4**. As silversmithing and goldsmithing started at a

relatively higher base (64% of total income was from craft activity), this likely explains why 85% of these respondents stated that it accounted for the same/similar proportion.

Table 4.4: Compared to 2019/20 (full year before Coronavirus (COVID-19) pandemic), does your current income from craft comprise a greater proportion of your total income?

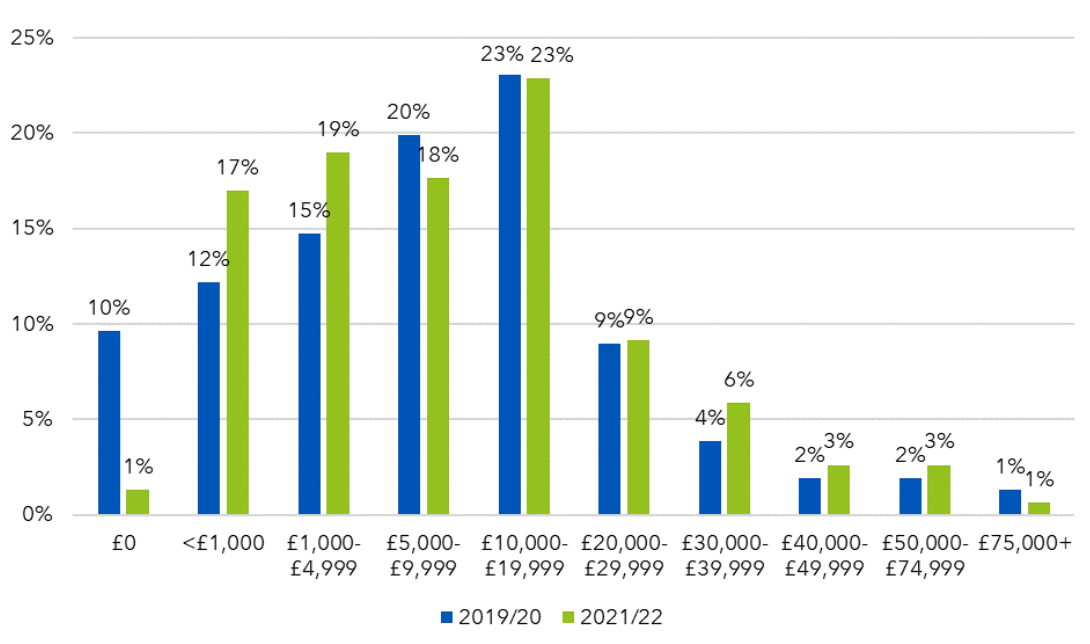
	Greater proportion of my total income is from craft compared to 2019/20	Craft income accounts for the same/similar proportion of total income as 2019/20	Craft income accounts for smaller proportion of total income as 2019/20	Not sure / don't know
Total (n=157)	30%	38%	22%	10%
Ceramics (n=35)	34%	37%	20%	9%
Glass (n=22)	27%	41%	14%	18%
Jewellery (n=34)	21%	53%	18%	9%
Silversmithing and Goldsmithing (n=13)	8%	85%	8%	0%
Textiles (n=51)	31%	39%	20%	10%
Wood Working (n=14)	36%	36%	21%	7%

5.3.2 Annual Income from Craft

Respondents were asked their approximate annual income for 2019/20 and 2021/22, **Figure 4.3**.

The proportion of makers reporting income in each income band remained largely similar with slight increases for the most recent year (18% reported a craft income of £20,000 or above in 2019/20 and 21% for 2021/22).

Figure 4.3: Annual Income from Craft 2019/20 and 2021/22



In terms of change at a makers level, over half of respondents reported no change in annual income from craft between 2019/20 and 2021/22 (53%) while almost one-third of makers income from craft had increased (30%). Less than one-fifth reported a decrease (17%). This could be due to some respondents beginning their craft business during the Coronavirus (COVID-19) pandemic, or the shift to online sales during government restrictions, allowing many makers to reach and sell to a wider audience.

5.3.3 Income over time

When asked about their expectations of their craft-related income over the short-medium term, half of makers (50%) anticipate that their income will grow over the next three years, **Table 4.5**.

Respondents were asked why they felt they felt their income would see these changes. Various reasons were identified for each of the income categories.

Table 4.5: Expected Change in Income Over Next Three Years

Expected change in income	%	Main reasons
Grow strongly	7%	<ul style="list-style-type: none"> Several respondents will be able to spend more time on their craft work including taking their business full-time Several respondents noted plans to expand their business. These makers anticipated that they would reach more customers. Recent growth in income and opportunities for further growth of own work and wider market Coronavirus (COVID-19) recovery so some anticipate more opportunities with relaxation of restrictions and reopening (6) Some will become more established as freelancers and sole traders within the region’s creative sector over the next few years (5)
Grow	43%	
Stay the same	17%	<ul style="list-style-type: none"> Expect to undertake the same amount of work – some respondents stated that they were already working at capacity and happy with this balance Continued unpredictability of cost of living crisis, particularly on creative sector which is more vulnerable, so expected income to roughly stay the same
Decline	15%	<ul style="list-style-type: none"> Many of these respondents referred to the (potential) impact of the cost of living crisis impacting their work Several respondents are reducing their business hours/size Challenge of Brexit has limited access to opportunities in EU markets and made it more expensive
Decline significantly	3%	
Don’t know	15%	<ul style="list-style-type: none"> Several factors make anticipating income unpredictable: creative sector in general (“not much financial security”); crises such as cost of living crisis.

N=157

Overall, the cost of living crisis is mentioned most frequently – appearing as the top factor in the decline, stay the same and don’t know categories. This shows that the main issue for Scottish makers currently surrounds the cost of living crisis and how this will impact business. This ranges from a rise in cost of materials to depressing demand in buyers who will have less disposable income to spend.

On average across respondents, 39% of craft makers income is generated within their local authority area, **Table 4.6.** On average, almost one-third of craft income for Scotland’s makers is generated outside of Scotland, in other parts of the UK (20%) and internationally (10%). This indicates the importance of accessing opportunities outside of Scotland for makers particularly at the higher-end professional level.

Table 4.6: Average source of income from craft work by location

	% of respondents
Local authority area	39%
Other parts of Scotland	32%
Other parts of the UK	20%
Outside of the UK	10%
Total	100%

N=142

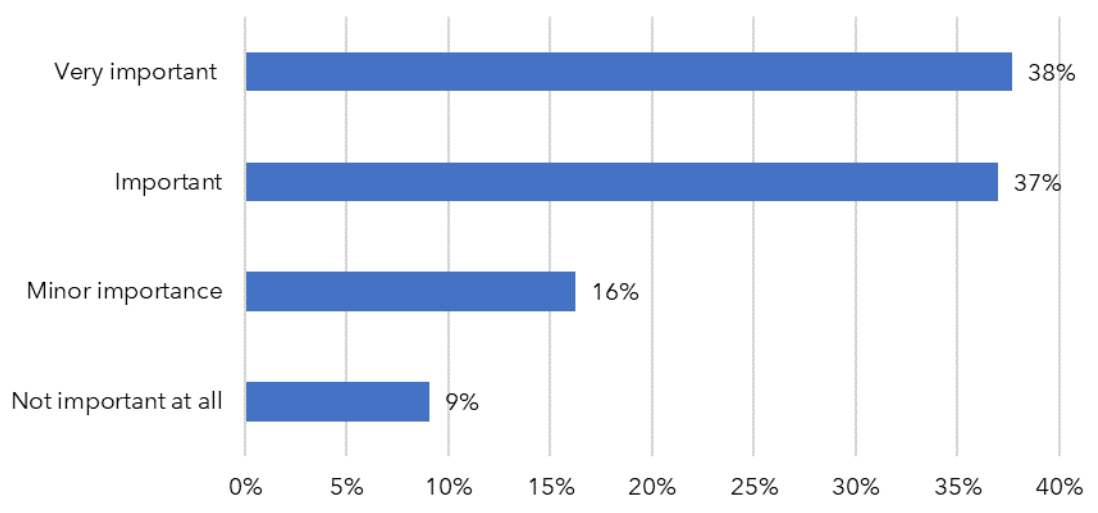
5.3.4 Opportunities beyond Scotland

Respondents were asked how important they felt it was to access opportunities beyond Scotland. Overall, three-quarters of makers felt that this important or very important for the future development of their work/practice (75%), **Figure 4.4**.

Despite this recognition of the importance of opportunities beyond Scotland, only 38% state that they have a plan to access these opportunities (41% no plan; and 21% don't know). Textiles were less likely to report having a plan for these opportunities.

The survey asked what support was necessary to allow makers to access opportunities beyond Scotland. The key issues identified were: financial support (21%); training/support (20%); identifying opportunities (17%); and support with international sales (15%).

Figure 4.4: Importance of Accessing Opportunities Beyond



N=155

5.4 Views of the Craft Sector

5.4.1 Challenges within the Craft Sector

Makers were asked what they felt were the three biggest challenges they face whilst working in the craft sector. Various issues were raised with the most common and significant issues being:

- Cost of living crisis
- Marketing
- Lack of time
- Income
- Finding buyers
- Brexit

Of these key issues, the cost of living crisis was mentioned the most frequently (73 times), reiterating that the cost of living crisis is the main issue impacting craft makers currently.

“Keeping the cost of services affordable while paying a fair wage and meeting increasing costs such as energy and materials.”

“Generating sales opportunities. So far, the pandemic has prevented me from taking part in local craft markets. Sales so far have been through word of mouth and social media.”

5.4.2 Contribution of the Craft Sector

The survey asked makers how important they felt the craft sector is to Scotland as a contributor to the regional economy. Over half of respondents felt the craft sector is a very important contributor to Scotland's regional economy (58%), with 98% feeling it is important to some extent.

When asked why they felt that that the craft sector is an important contributor to Scotland's regional economy, a range of factors were identified. This included: bringing in money to local areas; generating tourism; contributing to the economy; and creating employment.

“Makers tend to be quite embedded in the communities in which they work - they might provide employment, they will be customers of other local businesses, they are keen to organise and participate in local events such as design fairs or open studios.”

“Making people feel that their creations are of value and also to highlight to visitors that there are quality handmade alternatives to mass produced tourist tat.”

“Sales of craft objects generate income for makers, events like craft and design markets and exhibitions encourage visitors to the area, craft workshops and classes generator income for makers and organisations who run them.”

“The craft sector is an important part of the overall tourist/visitor economic sector. It helps make Scotland a more desirable place for people to visit if they can access good quality, locally produced art and craft products.”

Makers were also asked how important the craft sector is to Scotland as a benefit to local communities. The majority of respondents stated that the craft sector is very important (71%), with 98% stating it was important to some extent.

When asked why they said this, respondents felt that the craft sector benefits Scotland’s local communities as:

- It supports mental health and wellbeing
- It promotes community
- It keeps money in the local area
- It keeps Scotland’s culture alive
- It employs local people

“Local people can see, learn and experience making/ crafting directly and buy from local sources and suppliers.”

“Introducing a valued craft to many people; help with mental health issues, recreational activity for many, hopefully a new career for some.”

“It enriches the environment, both domestic and public space and adds to the cultural narrative of the community.”

5.5 Net Zero

Respondents were asked what opportunities the Scottish Government's 2045 Net Zero target creates for the craft sector. Makers suggested that there were a number of opportunities, these included:

- Using more sustainable materials
- Recycling and upcycling within craft
- Creating greener products
- Shopping locally – both for supplies and for craft
- Promoting high-quality items and slow craft

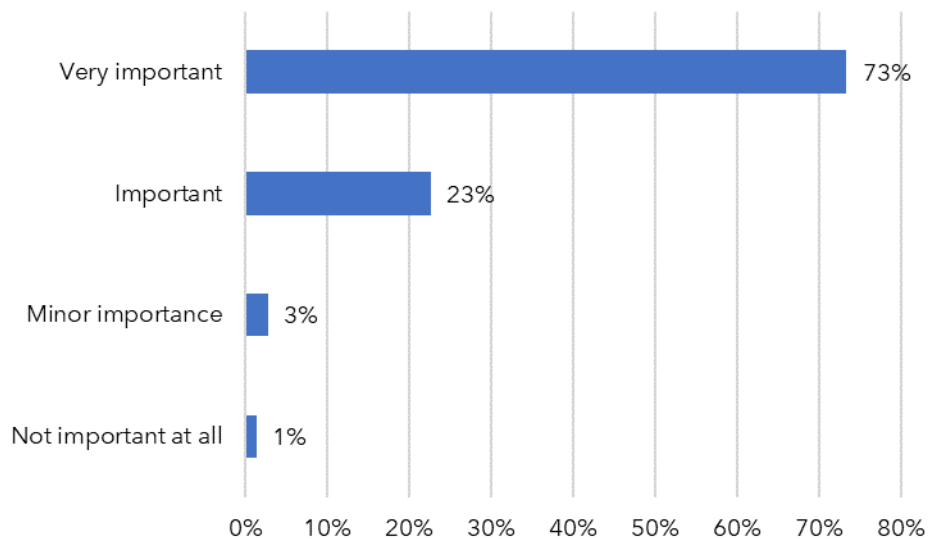
The survey also asked makers to identify any challenges that the shift to Net Zero would create. Again, a range of challenges were identified, including:

- Costs to becoming sustainable/net zero
- Switching to sustainable energy
- Sourcing sustainable materials
- The economy and cost of living crisis
- Importing supplies

5.6 Fair Work

When asked about the importance of Fair Work principles as a priority within the craft sector, the vast majority of makers state that they were important or very important (96%), **Figure 4.5**.

Figure 4.5: Importance of Fair Work Principles



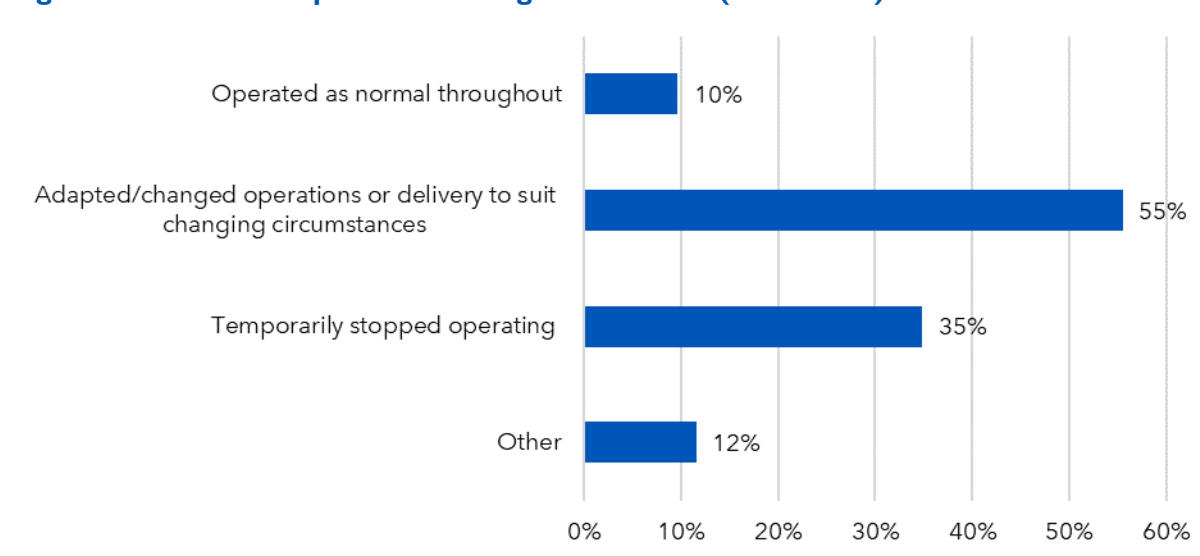
N=146

5.7 Impact of Coronavirus (COVID-19)

Respondents were asked about the Coronavirus (COVID-19) pandemic and how this impacted their craft work, **Figure 4.6**. Over half (55%) adapted and changed their operations whilst 35% temporarily stopped operating. Only 10% of respondents stated that their business was able to continue to operate as normal during the pandemic. *

When asked how they adapted to the Coronavirus (COVID-19) pandemic, most makers said that they shifted their focus to online sales – with some offering online sales for the first time during the pandemic. Many offered online services, such as teaching craft classes and/or workshops via Zoom and other online video platforms. Additionally, some had work delayed by the pandemic – particularly surrounding events and showcases – as restrictions delayed/postponed/cancelled these.

Figure 4.6: Business Operation During Coronavirus (COVID-19)



N=155. Other included makers who had started their business during the pandemic.

Respondents were asked the impact of the Coronavirus (COVID-19) pandemic on various aspects of their craft work, **Figure 4.7**. The issues which have had the largest impact on craft work appear to be planned project activity – with 44% stating it impacted their work a great deal – and income generating opportunities, with 42% feeling that this impacted their craft work a great deal. Half of respondents felt that the Coronavirus (COVID-19) pandemic did not impact their access to workspace or workforce, 50% and 51% respectively.

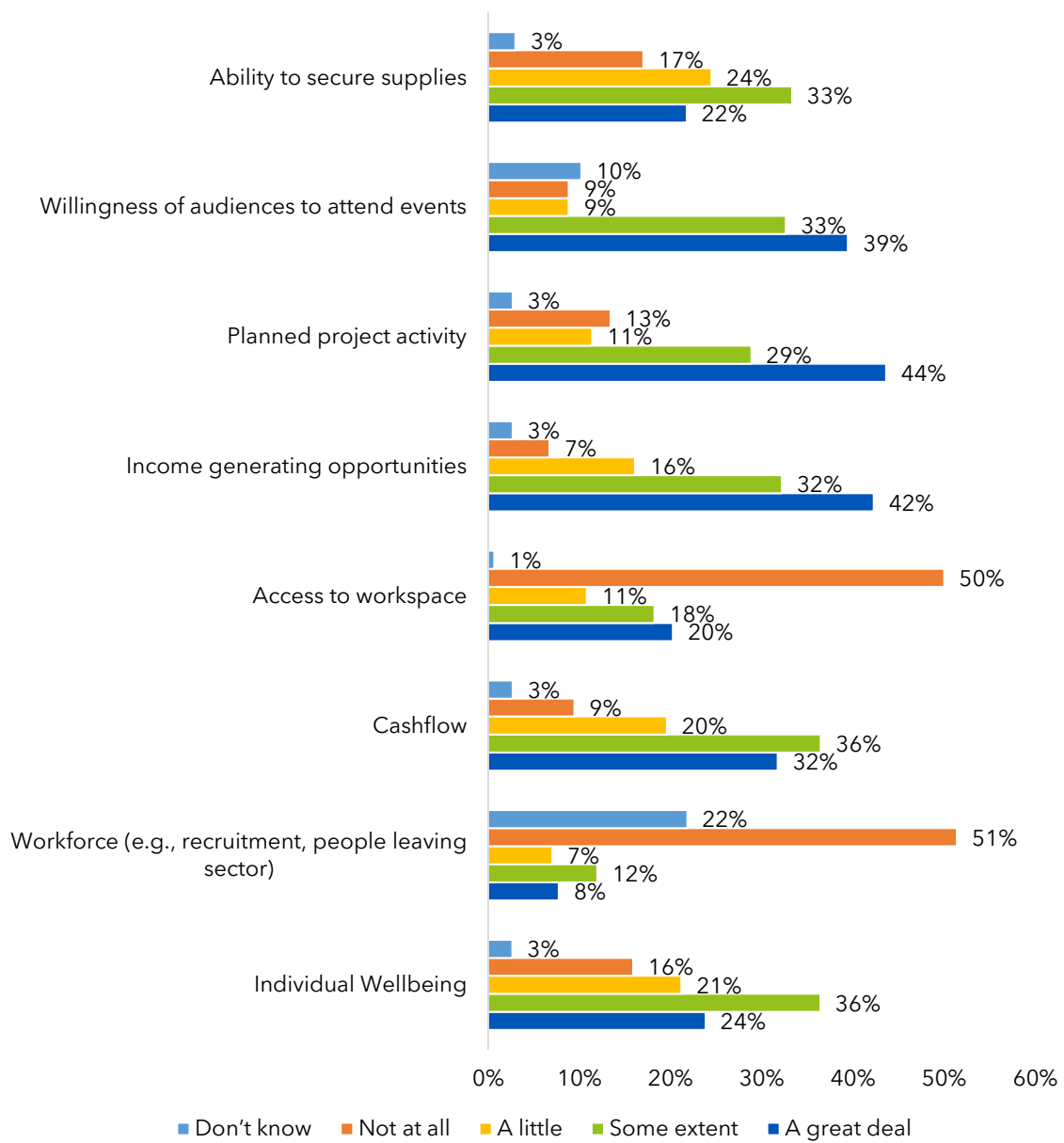
The survey asked makers whether they considered leaving the craft sector during/due to the Coronavirus (COVID-19) pandemic, **Table 4.7**. A strong majority of respondents stated that they never considered stopping their craft work (81%). A further 5% considered leaving the sector but ultimately decided not to.

Table 4.7: Did you consider leaving the craft sector as a result of the Coronavirus (COVID-19) pandemic?

	%
Yes – I have permanently left the sector	1%
Yes – I temporarily left the sector but have now returned	2%
Yes – I considered leaving but did not	5%
No – I never considered stopping my craft work	81%
Other	9%

N=151

Figure 4.7: Impact of Coronavirus (COVID-19) on Aspects of Craft Work

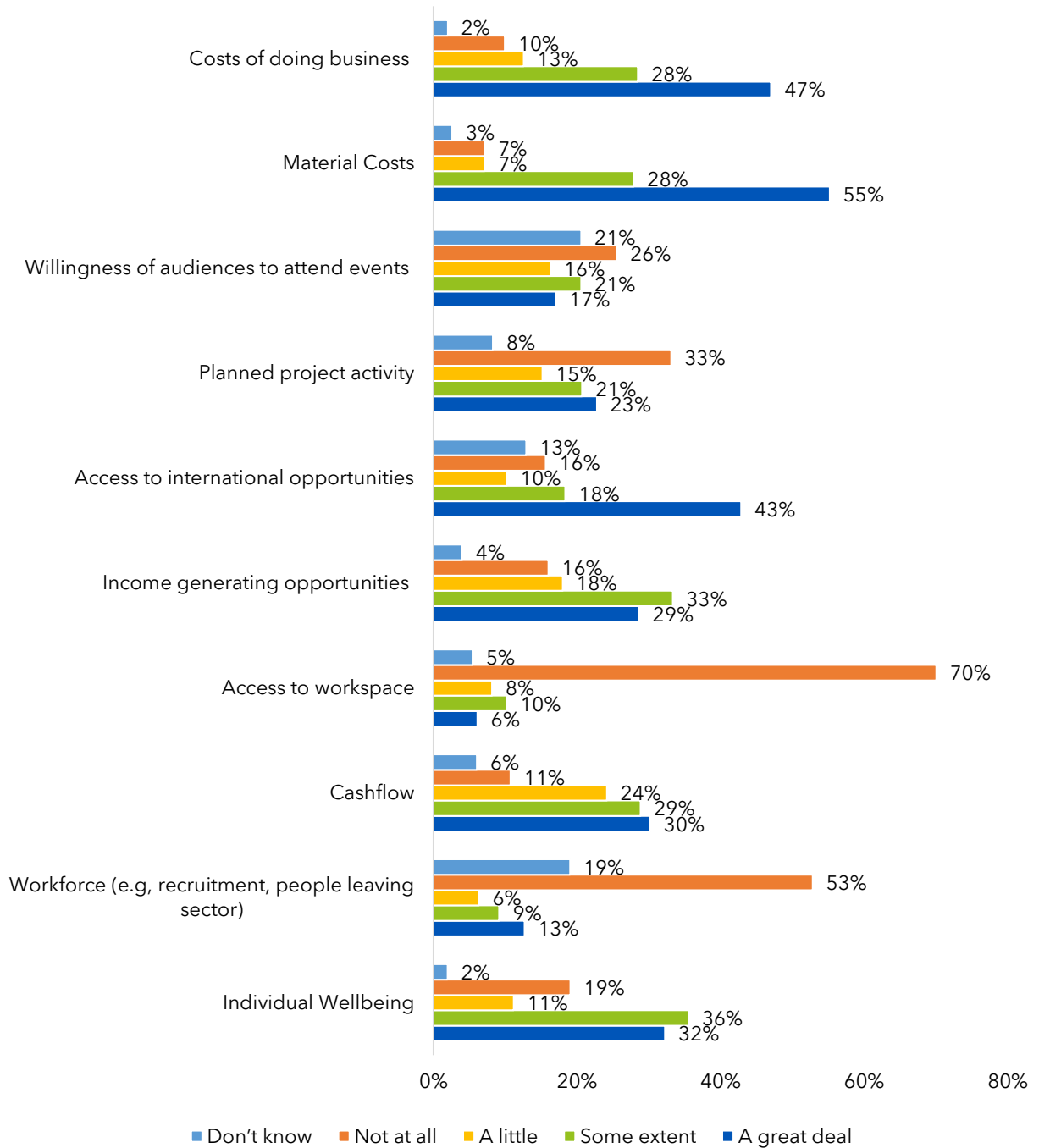


5.8 Impact of External Factors

The survey asked how respondents felt external factors (such as Brexit and rising costs) had impacted various aspects of their craft work, **Figure 4.8**. Material costs were seen to be most affected by these external factors – with 55% stating that external factors had affected the cost of materials a great deal. Following this, 47% of respondents felt that external factors had impacted the costs of doing business a great deal. Moreover, 43% felt external factors had affected makers access to international opportunities a great deal.

Contrastingly, 70% of respondents felt that external factors had no impact on their access to workspaces. Additionally, over half of respondents (53%) reported that external factors had not impacted their experience with the craft workforce (e.g., recruitment, people leaving the sector).

Figure 4.8: Impact of External Factors – e.g., Brexit and Rising Costs



5.9 The Future of the Craft Sector

Respondents were asked how they saw the future of their craft work/business in the medium to long term.

Over half of makers (52%) felt that their craft work/business will either have future growth (38%) or return to pre-pandemic levels (14%). However, 23% being unsure whether they would be able to sustain their business in the medium-long term, **Table 4.8**.

Table 4.8: Thinking about the medium/long term, how do you see the future for your craft work/business?

	%
Future growth	38%
Back to normal	14%
Reduced activity – but viable	24%
Can continue to work in the sector in the short-term, but uncertainty about medium term	23%
Don't think it can continue	1%

N=151

5.9.1 Scotland's Craft Sector

When asked about their confidence in the future of Scotland's craft sector, over half of respondents said they felt confident, 56%. More than one-fifth (22%) were neither confident nor unconfident, and 14% did not feel confident in the future of Scotland's craft sector.

5.10 Support

The survey asked makers about their support needs, whether they felt they would need support and what support would be needed.

Almost two-thirds (65%) reported a need for support followed by a quarter who were unsure (25%). Only 8% of respondents feel that they will not require support over the next three to five years or that it is very unlikely.

Respondents were then asked to identify the type of support they feel they will need to access, **Table 4.9**. The majority of those who feel they will need support in the next three to five years state that they will need financial support (64%) and support with showcasing (64%). Over half of respondents also feel that they will need marketing support (59%) and businesses advice (56%) during this time. However, only 10% of respondents felt that they would need support with Coronavirus (COVID-19) recovery during this time.

Those who felt they would need financial support were asked to identify what they would need this support for – this led to a variety of answers. Common themes emerged including:

- Purchasing craft equipment.
- Further training (for themselves or staff members).
- To find a suitable workspace – or upgrade existing workspace.
- Expanding their business.
- To aid with income.

Table 4.9: Type of Support Needed

	%
Financial support	64%
Showcasing	64%
Marketing support	59%
Business advice	56%
Networking	49%
Mentoring support	39%
For sustainable/ ethical making	38%
Crits (i.e. feedback on creative practice)	29%
Exporting	26%
Wellbeing and resilience	26%
CPD for makers working in community / learning settings	24%
Access to workspace	19%
For equalities, diversity and inclusion (including fair work)	14%
Coronavirus (COVID-19) recovery	10%

N=140. Multiple responses were possible.

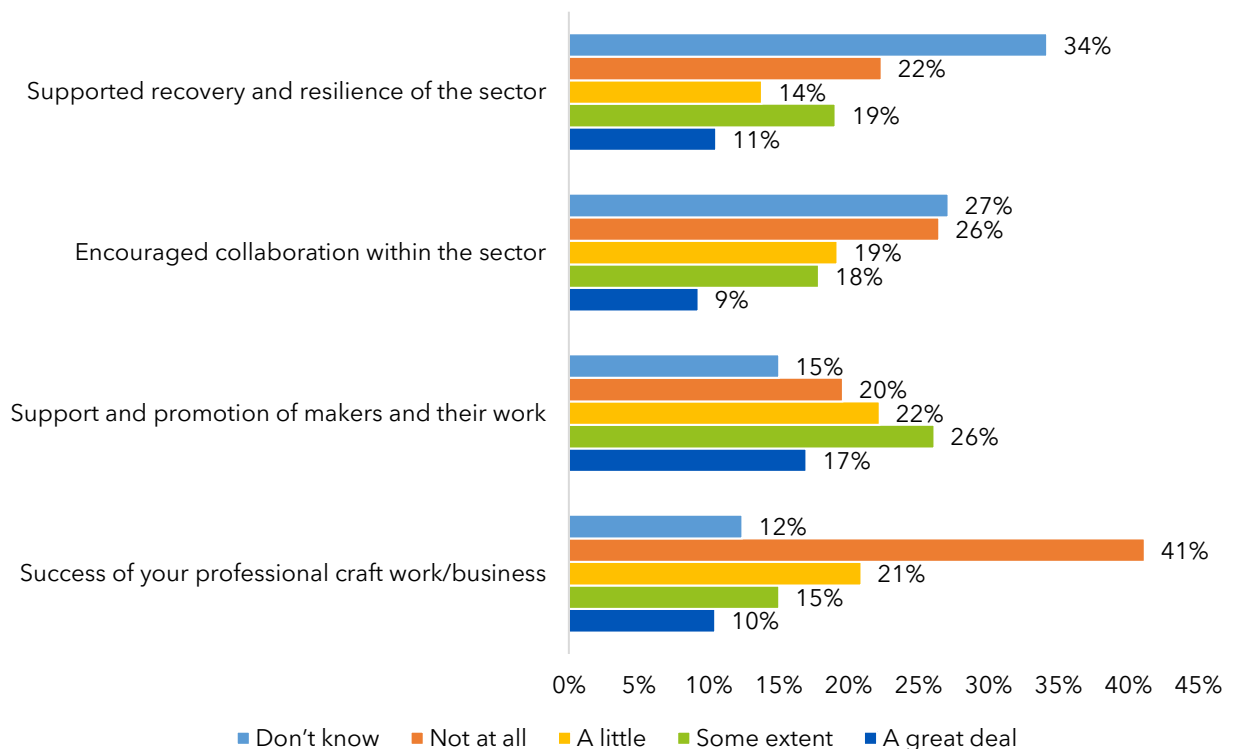
5.1 | Role of Craft Scotland

Respondents were asked to what extent Craft Scotland contributed to a range of factors relating to their craft work, **Figure 4.9**. Feedback from makers on the contribution of Craft Scotland vary significantly across different aspects.

Most notably, over two-fifths of respondents (41%), feel that Craft Scotland did not contribute to the success of their professional craft work or business, while 46% feel that they contributed at some level. However, only 10% feel that they contributed a great deal. It should be noted that there a range of factors that influence the success of a business.

Many respondents are also unsure of the extent to which Craft Scotland have contributed to certain areas. 34% reported that they do not know to what extent Craft Scotland have supported recovery and resilience in the craft sector. Similarly, 27% of respondents stated that they are unsure surrounding the extent to which Craft Scotland have encouraged collaboration within the sector.

Figure 4.9: Contribution of Craft Scotland



5.1.1.1 Recovery and Resilience

Makers were asked an open question about what they felt could be done, including by Craft Scotland, to support recovery and resilience in the craft sector. Responses varied; however common themes were identified:

- Providing grants, funding and/or financial support to makers/craft businesses.
- Identifying and advertising opportunities for makers.
- Promoting and aiding with the marketing of makers and craft businesses.
- Providing advice and support to makers.
- Supporting those in rural areas.

6 Stakeholder Feedback

In addition to the main primary research with craft makers, the study also gathered views from a range of stakeholders at regional and national levels who are concerned with supporting the development of the craft sector. This section provides a summary of the findings from these six discussions (a list of the consultees can be found in **Appendix D**).

6.1 The sector and its contribution to Scotland

Stakeholders consider craft to be a distinct sector within the creative industries which makes an important social, cultural and economic contribution to makers, communities, and audiences/customers.

Key aspects of the sector and its contribution that were highlighted included:

Nature of the craft sector

- Most stakeholders highlighted that there are a high number of makers, both amateur/hobbyists as well as more established and professional makers, based throughout Scotland, across a range of artforms including jewellery, textiles, metal and woodwork. The nature and character of these artforms can vary considerably as well as how organisations work within these subsectors.
- Most stakeholders feel that the sector is resilient in that craft work is often self-sustaining for makers (i.e. can make lots of smaller items to sustain them while going for larger items/ projects/ commissions).
- Most stakeholders noted that craft is a very innovative and experimental sector as traditional crafting skills, materials and practices can be interpreted and applied in a contemporary way across various settings (e.g., industrial settings). PANEL is a key organisation in this regard.
- Some stakeholders report that both contemporary and heritage craft have significant roles to play and come with their own challenges (e.g., public perception of craft not being contemporary, and some heritage craft being endangered). However, the distinction between these is often blurred, and contemporary craft often interprets and adopts traditional heritage craft skills in new ways.
- Few stakeholders highlight that craft assets tend to be softer i.e. its makers and organisations such as internationally renowned assets and businesses (Northlands Creative Glass, Harris Tweed) rather than physical assets of studios and workspaces which were reported as lacking.

Economic performance of the craft sector

- Most stakeholders consider that the economic contribution of the craft sector is generally considered to be underestimated. This is felt to be largely due to craft being a difficult sector to track and map (e.g., “might only be selling something on Etsy on the side”).

- Few stakeholders noted that Scotland is a relatively small domestic market therefore accessing opportunities outside of Scotland, particularly London and internationally, is considered important to makers. While the context of Coronavirus (COVID-19) and Brexit has brought obvious challenges in this regard, consultees were encouraged to see access to international trade fairs beginning to return to pre-pandemic levels for Scotland’s makers. Access (and support to access these opportunities) will continue to be important as makers try and navigate Brexit to develop new or existing relationships. For example, some noted that Scottish jewellery makers, particularly specialising in high end products, had strong relationships with EU markets which has been complicated and made more expensive by Brexit.

Diversity and geography of the craft sector

- Although traditions of craft are widespread throughout Scotland, all stakeholders identified clear clusters of activity around the main cities, particularly Glasgow, Edinburgh and increasingly Dundee, as well as semi-rural areas such as the Highland and Islands, Fife, and South of Scotland. It was noted that semi-rural areas tend to attract more established makers who choose to locate there for both quality of life and their craft practice. The natural environment and strong visitor economies in these areas, which are considered conducive to the (often) slow, methodical process of craft practice, are often significant factors for relocating there.
- In terms of equalities and diversity, most stakeholders highlighted that many makers and people within the sector are predominantly white and middle class, particularly at more established and professional levels. The privilege and financial backing of these groups gives greater opportunity to commit to a career in craft, which is often perceived as a luxury rather than as a viable career option when first starting out.
- Most stakeholders report that pay is generally below Living Wage and craft is rarely the sole income for makers so their earnings are supplemented through other jobs either related to craft (e.g., teaching, which would have been impacted by the Coronavirus (COVID-19) pandemic) or outwith the sector. This is particularly said to be the case in rural communities where rural makers will likely have a host of different jobs.
- Most stakeholders highlighted that craft has a low barrier to entry and involvement, so a lot of people can get involved in craft (e.g., teaching workshops, YouTube tutorials, low cost of equipment) but it is incredibly hard to become professional and make a living from craft – which tends to privilege those from white and middle-class backgrounds.

Collaboration and lobbying of the craft sector

- There were slightly mixed views on the extent of collaboration within the sector. Overall there is a good sense of community however it appears to be informal networks of makers - “hubs of collective support but tend to be more networks than studio groups”.
- Few stakeholders noted that craft can sometimes be seen as the “poor relation” of other creative subsectors, particularly compared to performing (audience focused) arts/more visual arts-focused

who typically have a stronger physical presence; and are said to be more effective at lobbying. This can sometimes translate at gallery level where there is typically a hierarchy of subsectors in terms of exhibitions of and displays (“visual arts then craft”).

6.2 Areas of opportunity

Reflecting the diverse nature of the craft sector, a wide range of different opportunities were identified to help the craft sector to grow in Scotland. These included:

- Opportunity identified by all stakeholders is the shift to a “sustainable economy” in which consumers have greater interest in and preference for longer-lasting, sustainable and handmade items rather than mass-produced, standardised and “fast” products.
- All stakeholders also noted the shift to the “experience” economy with a strong appetite for hobbyist workshops and open studio events (such as Spring Fling). which has gained interest in recent years. For example, the increasing demographic of younger audiences/customers interested in craft “might not buy product but might buy an experience” – the sector is well-placed in this regard given that craft makers have extensive experience in facilitating these experiences through workshops and learning lessons. This can also feed into the visitor economy.
- All stakeholders report that Scotland’s craft makers have a competitive advantage at an international level with internationally renowned provenance and authenticity. For example, the Outer Hebrides was designated the World Crafts Council Europe’s second Craft City in 2018 with its rich craft heritage relating to Harris Tweed¹³.
- The health and wellbeing agenda is a key national priority, not least as we emerge from the pandemic. Most stakeholders feel that makers can play an important role in facilitating activities that have relatively few barriers to engagement (workshops), encouraging participation in and from the wider community and with positive mental and physical health outcomes. This also represents an opportunity to diversify funding for craft organisations and generate income for makers;
- In the context of net zero targets, most stakeholders noted that crafting skills will be in demand with a focus on consuming less, as well as making and mending items themselves (circular economy).
- Few stakeholders highlight that the American market is important for clay, ceramics, and jewellery with potential for further growth.
- There is interest from a few stakeholders in how craft can contribute and collaborate with other sectors in a functional sense which goes beyond the decorative perception of craft (e.g., redesigning hospital wards, using material from concrete factories in an industrial setting etc.).

¹³ [World Crafts Council Europe - Harris Tweed](#)

6.3 Challenges

The craft sector faces many of the challenges that affect the economy generally. However, consultees also identified issues more specific to the craft sector:

- The main challenge raised by all stakeholders related to the rising cost of living – it remains uncertain the potential scale of the impact, but stakeholders note that it is likely to depress demand from customers and audiences (particularly casual and younger buyers) who will have less disposable income to spend. This combined with the increased cost of materials and energy costs associated with making may affect the supply side (and its price point). For example, the increased energy cost to operate a kiln was raised as a common example for the impact on the craft sector. Therefore, stakeholders felt that craft products could be reframed in terms of what their value is rather than their cost – this again links into move towards handmade, sustainable and long-lasting economy which craft is well-placed to contribute to and lead on.
- Most stakeholders highlighted that the Coronavirus (COVID-19) exacerbated the lack of craft provision within the education system which was already facing pressures of limited resources. It was also noted that there is demand from teachers to teach, but resources are limited with teachers sometimes having to cover the costs themselves.
- There will be limited opportunities to develop a pipeline of diverse makers if education does not include craft – this is worrying for stakeholders in the longer term, particularly for subsectors such as ceramics and glass where departments within higher and further education institutions have closed. Over the long-term, the lack of education offering in these craft may “endanger” their practices. Therefore, almost all stakeholders highlight the value and success of the [MAKE Learn](#) project - which reviews the provision and development of craft education within Scotland’s primary and secondary schools and beyond - as it offers real potential in terms of getting craft back into education and school sector to encourage young people to make which may lead to them considering craft as a viable career option. MAKE Learn is a project coordinated by [Panel](#) and Craft Scotland.
- Feedback from some respondents suggests that Brexit has limited access and made it more expensive for makers to access existing EU markets – some jewellery businesses have particularly strong relationships with EU markets and this has become complicated and more expensive.
- Most stakeholders reported a relative lack of (affordable) facilities and infrastructure to support craft business development which limits the physical presence and visibility of craft within communities.
- In terms of equalities and inclusion, all stakeholders felt there should be greater diversity of makers as the sector (both makers and people in support organisations) are predominantly white and middle class, particularly at more established and professional levels.
- Few stakeholders reported that the insecurity of funding for support organisations of craft sector makes it difficult to plan longer-term programmes of support – Craft Scotland is valued in terms of providing this strategic direction.

- Few stakeholders highlighted that some heritage craft skills are endangered and risk being lost in communities and the sector.

6.4 Future needs and priorities for the sector

When asked about the future needs of the sector, there was a consistent view that the contribution that the sector makes is under recognised, therefore it is essential that there is a stronger collective voice for the sector with a lobbying and advocacy role to politicians as is effective in other creative sectors. A leadership role for Craft Scotland with support and input from other key organisations (e.g., Applied Art Scotland, Fife Contemporary) was suggested.

Other comments by some stakeholders included:

- The Craft Development Network is considered a valuable tool and this could be further developed to encourage and facilitate greater collaboration both between organisations and to connect with makers. It was said that this could be helped by adopting a project-driven approach.
- Investment to develop more physical assets/presence for craft. It was said this would increase visibility and help to strengthen informal networks of makers.
- More selling/showcasing opportunities for makers and support to help a wide and diverse range of makers to access these.
- Greater engagement and opportunities for craft within heritage and tourist sectors (e.g., whisky distilleries, national museums as has happened with Dundee VandA, craft biennale etc).
- Support for pathways to access international and export markets, particularly in context of Brexit and Coronavirus (COVID-19) recovery.
- As there is a lack of (affordable) facilities and infrastructure to support craft business development, greater studio and workspace facilities, particularly in cities, would be welcomed. In turn, this would increase the physical presence and visibility of craft within communities, particularly as a contemporary artform.
- Protect endangered heritage craft.
- Greater diversity of funding models as grant funders tend to give more for delivery of work and supporting public benefit. As craft is dominated by very small businesses, they tend to just want to buy a piece of equipment (e.g., sewing machine, kiln) which can be harder to access through currently available funding schemes.
- A brokering role to support commissions to connect makers to opportunities (Dovecot Studios was said to do this well and other examples including facilitating high-end commissions from Bank of Scotland or Theatre Royal).

6.5 Policy Drivers

As well as considering how to better support the craft sector, consultees also commented on ways in which the sector might better contribute to the delivery of wider policy priorities, in particular to health and wellbeing.

The notion of the wellbeing economy is one that is gathering momentum and the craft sector could have an important role to play. The contribution that cultural participation can play to individual and community health is now well established, even if the funding models are still evolving. Examples of effective contribution by the craft sector included: [Flourish Jewellery CIC](#) who work with hard-to-reach communities to access high quality jewellery training taught by professional makers.

Stakeholders recognised that the craft sector is strongly committed to Fair Work principles. However, the challenge of craft as a generally low paid sector largely reliant on self-employment means that support and resources are required to aid the sector's contribution to Fair Work.

In this regard, stakeholders noted the value of the useful guidance that is already available including the pay rates guidance outlined by Scottish Artists Union and Creative Scotland's Fair Work Guidance.

Finally, as noted above, the craft sector in Scotland already has strong community roots particularly in certain regions, and organisations such as Fife Contemporary¹⁴ are seeking to develop this further through the creative placemaking work. This is again an area in which many thought there was further potential to expand the role and contribution of the craft sector.

¹⁴ Fife Contemporary [Making Spaces](#)

7 Conclusions

This chapter brings together the main findings of the report and sets out some issues and opportunities that may be worth further consideration by Craft Scotland and its regional and national partners.

- With 2,030 jobs, almost 400 businesses and a £67.3m contribution to Scotland's economy, the craft sector makes an important contribution to economies and communities throughout Scotland.
- Across the various strands of this research, the disproportionate impact of Coronavirus (COVID-19) on the craft sector is evident – e.g., 37% annual drop in economic output, only 10% of makers continue to operating as normal, craft largely being left out of the education system;
- However, there are emerging positive signs that there appears to be a degree of a bounce-back with growth in the business and employment bases and the fact that the very small and innovative nature of businesses allowed them to be flexible and adapt during the pandemic.
- As turnover and productivity data is only available for 2020, it remains to be seen whether the extent of the recovery which has been seen in the regrowth of the employment and business bases will translate into a bounce-back in economic output. Anecdotal evidence from stakeholders suggest that the return of large events and fairs (e.g., Spring Fling) which are significant financial contributors to makers, regional economies and the sector at a national level will help to aid this recovery. Feedback from the makers survey suggests that annual incomes has remained relatively stable with only some changes.
- Craft is well-placed and already has a competitive advantage to meet the changing consumer patterns which have been accelerated by the Coronavirus (COVID-19) pandemic such as handmade economy and focus on buying experiences which will attract a younger demographic. In this way, the sector could reframe items in terms of their value to the buyer rather than the cost as well as raise awareness and understanding of the value and process of making.
- Many examples of craft sector already contributing to main policy drivers such as mental health and wellbeing objectives including hobbyist and learning workshops with hard-to-reach communities. Whilst there is a strong commitment across the sector that Fair Work principles are important, it is recognised that this may be challenging given the sector is largely comprised of very small businesses reliant on self-employment and further signposting to guidance (e.g., Scottish Artists Union pay rates) may be required.

- One of the main challenges facing the sector is to support makers through the cost of living crisis, which to some businesses, is as fundamental a threat as Coronavirus (COVID-19). This will be seen through less disposable income from buyers and increased production and overhead costs for makers (e.g., increased cost of running a kiln) – this was raised during makers survey and stakeholder findings. For example, only 10% of makers report a need for Coronavirus (COVID-19) recovery suggesting that the focus has now moved to the impact of the cost of living crisis which reiterated throughout the makers survey and the stakeholder consultations.
- Stakeholders note that financial support during Coronavirus (COVID-19) was extremely valuable and that similar levels of support may be required to meet the ongoing crisis of the rising cost of living. The cost of living crisis was considered the main challenge for makers, particularly those who suggest their income may decrease in next three years, as there will likely be less disposable income from buyers and increased production and overhead costs for makers (e.g., increased cost of running a kiln).
- Reinstating craft back into the education system is considered a priority for stakeholders to develop a future people of creative talent and skills retention;
- In the context of Coronavirus (COVID-19) and Brexit, accessing showcasing and selling opportunities outside of Scotland and the UK remains important to creative makers – some of whom may require targeted support.
- While there are lots of examples of craft makers and organisations making important and innovative economic, social and cultural contributions, there is a sense that this should be more joined up which would raise awareness and improve visibility of craft makers. It was stated that Craft Scotland could take a leadership role in this regard utilising the existing Craft Development Network to adopt a project-driven approach of collaboration.
- A lobbying and advocacy role to secure further investment and visibility should be led by Craft Scotland and supported by regional and national partners – this could help the sector to have a stronger collective voice as seen in other creative sectors and address the perception of craft as the “poor relation” in terms of creative subsectors.

Appendix A: Creative Industries Growth Sector Definition

Table A1: Scottish Government Creative Industries Growth Sector Definition

Sub-Sector	SIC 2007
1. Advertising	SIC 73.11: Advertising agencies
	SIC 73.12: Media representation
2. Architecture	SIC 71.11: Architectural activities
3. Visual art	SIC 90.03: Artistic creation (70%)
	SIC 47.78/1: Retail sale in commercial art galleries
4. Crafts and Antiques	SIC 31.09: Manufacture of other furniture
	SIC 16.29: Manufacture of other wood products (30%)
	SIC 32.12: Manufacture of jewellery and related products
	SIC 32.13: Manufacture of imitation jewellery and related articles
	SIC 23.41: Manufacture of ceramic household and ornamental articles (35%)
	SIC 23.49: Manufacture of other ceramic products (35%)
	SIC 23.13: Manufacture of hollow glass (15%)
	SIC 23.19: Manufacture of other glass (15%)
	SIC 47.79/1: Retail sale of antiques and antique books
	SIC 95.24: Repair of furniture and home furnishings
5. Fashion and textiles	SIC 13: Manufacture of textiles (25%)
	SIC 14: Manufacture of wearing apparel (20%)
	SIC 15: Manufacture of leather and related products (20%)
	SIC 74.1: Specialised design activities (25%)
6. Design	SIC 71.12/1: Engineering design activities for industrial process and production
	SIC 74.1: Specialised design activities (75%)
7. Performing arts	SIC 90.01: Performing arts
	SIC 90.02: Support activities to performing arts
	SIC 90.04: Operation of arts facilities
	SIC 78.10/1: Motion picture, television and other theatrical casting
8. Music	SIC 59.2: Sound recording and music publishing activities
	SIC 18.20/1: Reproduction of sound recording
	SIC 32.2: Manufacture of musical instruments

9. Photography	SIC 74.20/1: Portrait photographic activities
	SIC 74.20/2: Other specialist photography (not including portrait photography)
	SIC 74.20/9: Other photographic activities (not including portrait and other specialist photography and film processing) n.e.c.
10. Film and video	SIC 18.20/2: Reproduction of video recording
	SIC 59.11/1: Motion picture production activities
	SIC 59.11/2: Video production activities
	SIC 59.12: Motion picture, video and television programme post-production activities (25%)
	SIC 59.13/1: Motion picture distribution activities
	SIC 59.13/2: Video distribution activities
	SIC 59.14: Motion picture projection activities
11. Computer Games	SIC 58.21: Publishing of computer games
	SIC 62.01/1: Ready-made interactive leisure and entertainment software development
12. Radio and TV	SIC 59.11/3: Television programme production activities
	SIC 59.13/3: Television programme distribution activities
	SIC 59.12: Motion picture, video and television programme post-production activities (75%)
	SIC 60.1: Radio broadcasting
	SIC 60.2: Television programming and broadcasting activities
13. Writing and Publishing	SIC 90.03: Artistic creation (30%)
	SIC 58.11: Book publishing
	SIC 58.13: Publishing of newspapers
	SIC 58.14: Publishing of journals and periodicals
	SIC 58.19: Other publishing activities
	SIC 18.11: Printing of newspapers
	SIC 18.129: Other printing (not labels)
	SIC 18.13: Pre press and media services
	SIC 63.91: News agency activities
14. Libraries and archives	SIC 91.01: Libraries and archive activities
15. Software/electronic publishing	SIC 58.29: Other software publishing
	SIC 62.01/2: Business and domestic software development
	SIC 62.02: Computer consultancy activities
16. Cultural education	SIC 85.52: Cultural Education

Note: Numbers in red represent the proportion allocations for what can be allocated to each SIC code within sub-sector (e.g. 70% of artistic creation is in Visual Arts and 30% is in Writing and Publishing).

Appendix B: Economic Performance – Additional Tables and Figures

Table B.1: Employment and Businesses by Local Authority

	% of Employment (2022)	% of Businesses (2022)
Glasgow City	23%	13%
City of Edinburgh	8%	10%
North Lanarkshire	8%	3%
West Lothian	7%	1%
Renfrewshire	6%	4%
Clackmannanshire	4%	0%
Fife	4%	8%
South Lanarkshire	4%	4%
Perth and Kinross	3%	4%
Orkney Islands	3%	1%
Highland	3%	8%
Midlothian	3%	1%
North Ayrshire	3%	1%
Falkirk	2%	3%
Aberdeen City	2%	3%
Aberdeenshire	1%	3%
Scottish Borders	1%	3%
Stirling	1%	3%
East Lothian	1%	1%
East Renfrewshire	1%	1%
Argyll and Bute	1%	1%
Dundee City	1%	0%
West Dunbartonshire	1%	1%
Na h-Eileanan Siar	1%	0%
South Ayrshire	1%	0%
Angus	1%	1%
Dumfries and Galloway	0.5%	3%
East Ayrshire	0.5%	0%
Shetland Islands	0.5%	0%
Inverclyde	0.2%	0%
East Dunbartonshire	0%	0%
Moray	0%	0%
Total	2,030	390

Source: Business Register and Employment Survey; and UK Business Counts. Note: Figures may be too small at local authority level to be captured in business data.

Table B.2: Employment by Craft Subsectors (2015 – 2021)

	2015	2016	2017	2018	2019	2020	2021	% of Craft Total
Manufacture of other furniture	1,250	1,750	1,250	1,750	1,000	1,000	1,250	62%
Retail sale of antiques including antique books, in stores	250	225	300	250	400	225	225	11%
Manufacture of jewellery and related articles	250	300	350	250	300	225	200	10%
Manufacture of hollow glass	120	120	135	120	120	135	135	7%
Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting	55	70	45	60	45	75	75	4%
Repair of furniture and home furnishings	125	250	125	150	250	125	75	4%
Manufacture of imitation jewellery and related articles	50	75	50	40	45	45	35	2%
Manufacture of ceramic household and ornamental articles	25	25	70	25	25	10	20	1%
Manufacture and processing of other glass, including technical glassware	15	15	25	15	15	15	15	1%
Manufacture of other ceramic products	5	0	5	0	0	0	0	0%
Crafts and Antiques	2,145	2,830	2,355	2,660	2,200	1,855	2,030	100%

Figures rounded to nearest 10. Source: Business Register and Employment Survey

Table B.3: Business Base by Craft Subsectors (2015 – 2022)

	2015	2016	2017	2018	2019	2020	2021	2022	% of Craft Total
Manufacture of other furniture	150	145	145	145	160	145	165	165	42%
Manufacture of jewellery and related articles	60	70	65	65	60	65	65	75	19%
Retail sale of antiques including antique books, in stores	75	75	70	75	70	70	70	75	19%
Repair of furniture and home furnishings	50	50	55	50	55	50	50	50	13%
Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting	15	15	15	15	15	10	10	15	4%
Manufacture of imitation jewellery and related articles	10	10	10	10	10	10	5	5	1%
Manufacture of ceramic household and ornamental articles	5	5	5	5	5	5	5	5	1%
Manufacture of other ceramic products	0	0	0	0	0	0	0	0	0%
Manufacture of hollow glass	0	0	0	0	0	0	0	0	0%
Manufacture and processing of other glass, including technical glassware	0	5	5	0	0	0	0	0	0%
Crafts and Antiques	365	375	370	365	375	355	370	390	100%

Figures rounded to nearest 5. Source: UK Business Counts

Appendix C: Makers Survey 2022 - Additional Tables and Figures

Table C.1: Respondents by Local Authority Area (Descending Order)

	%
City of Edinburgh	10%
Glasgow City	10%
Highland	9%
Perth and Kinross	8%
Aberdeenshire	7%
East Lothian	7%
Orkney Islands	6%
Aberdeen City	5%
Fife	5%
Shetland Islands	5%
Dumfries and Galloway	4%
Argyll and Bute	3%
Midlothian	3%
Angus	3%
Dundee City	2%
North Ayrshire	2%
South Lanarkshire	2%
Stirling	2%
East Renfrewshire	1%
Inverclyde	1%
Na h-Eileanan Siar	1%
North Lanarkshire	1%
Renfrewshire	1%
Scottish Borders	1%
South Ayrshire	1%
West Lothian	1%
Clackmannanshire	0%
East Ayrshire	0%
East Dunbartonshire	0%
Falkirk	0%
Moray	0%
West Dunbartonshire	0%

N=116

Table C.2: Respondents by Ethnicity (Descending Order)

	%
White Scottish/ White British	82%
White Other	11%
Mixed or Multiple Ethnic	3%
Irish	2%
Caribbean/ Caribbean Scottish/ Caribbean British	1%
Polish	1%
Arab/ Arab Scottish/ Arab British	0%
African/ African Scottish/ African British	0%
Asian/ Asian Scottish/ Asian British	0%
Black/ Black Scottish/ Black British	0%
Chinese/ Chinese Scottish/ Chinese British	0%
Gypsy Traveller	0%

N=155

Table C.3: Respondents by Sexual Orientation (Descending Order)

	%
Straight/ Heterosexual	92%
Bisexual	5%
Gay/ Lesbian	1%
Prefer to self-describe	1%

N=134

Table C.4: Which of the following activities make up your craft related income?

	%
Making and selling contemporary craft objects	90%
Teaching craft to less formal groups, e.g., evening classes, workshops etc.	45%
Grants from trusts or public bodies	18%
Teaching or lecturing in art/craft/design at a Further Education or Higher Education institution (craft or design related)	15%
Running/owning a craft initiative/venue/workspace	14%
Other craft-related activity	13%
Owning a commercial gallery or craft shop	11%
Work for other business sectors using craft and design skills and knowledge	10%
Being a craft-maker in residence	8%
Running or organising craft events such as exhibitions or fairs	7%
Curating exhibitions	6%
Teaching art/craft/design in a school	5%
Managing or working in a commercial gallery or craft shop	5%
Writing professionally about craft	3%
Working in a public museum or gallery (including in the museum shop)	3%
Crowdfunding	3%
Private investment including sponsorship	1%

N=158. Multiple responses were possible.

Appendix D: Consultees

The authors would like to thank the following for their helpful contributions to the research:

Table D.1: Stakeholder Consultees

Name	Organisation
Jessica Bonehill	Creative Scotland
Ebba Goring	Scottish Goldsmiths Trust
Kate Grenyer	Fife Contemporary
Catherine Lowe	Scottish Glass Society
Amy Marletta	Upland
Helena Ward	Creative Scotland

Craft

SCOTLAND

About

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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