Consuming Craft: the contemporary craft market in a changing economy

Morris Hargreaves McIntyre

Contents

Cover images
(clockwise from top)

Margo Selby Gallery
and Shop, 2009
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COLLECT 2010
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COLLECT 2009
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1.0 Executive summary

Morris Hargreaves McIntyre was commissioned by the Crafts Council in March 2010 to research the current size, value and characteristics of the contemporary craft market in England.

The resulting research provides evidence of the craft sector's economic impact from a market perspective, and supports craft retailers, galleries and makers in assessing the complex and evolving markets within which they work.

The research has also produced a new and replicable methodology, by which key market value statistics can be effectively updated in future.

1.1 Introduction

Research has shown significant shifts in consumer demand, towards value-centred products, services and experiences which meet emotional – as well as functional – needs. As markets evolve in response to recession and a changing economy, there is a need to understand how these values – and their associated behaviours – may shift and settle into new patterns of consumption relevant to contemporary craft.

This substantial, quantitative research study reports on the characteristics of the craft market in 2010, providing forward-facing market intelligence and a strong basis for advocacy work and future planning as well as essential information for contemporary craft makers and suppliers of craft.

1.2 Research Method

The aims of this research study are to understand:

1. The current size and growth potential of the contemporary craft market in England.
2. Within this market, where the strongest growth potential can be found.
3. How this picture (1 and 2 above) has changed since 2004, when the first study of the craft market in England was undertaken[1].
4. How we might expect the contemporary craft market to evolve during the period 2010 – 2015, in response to broader consumer trends.

Research Method

The research was conducted between April and June 2010. The statistics in this report are based on:

— Data derived from an online population survey, conducted with a representative sample of 7,000 adults aged 16 and over living in the UK between April and May 2010. The results are based on the responses of 4,259 adults[2] and allows us to estimate the current size of the market for craft in England and to accurately describe the characteristics of those who buy, or are potential buyers, of craft (1.3 – 1.4).
— An in-depth, online survey of 416 adults who buy or are predisposed to buying craft. These responses provide us with greater detail about the purchasing behaviour and prevailing attitudes amongst the craft market today (1.5 – 1.8).
— Desk research undertaken to review literature on current consumer trends and to consider how these may influence the development and evolution of the craft market (1.9 – 1.10).

1 Morris Hargreaves McIntyre (2006), *Making it to Market: developing the market for contemporary craft*, Arts Council England. This report presented the findings of a two-year-long research programme by Morris Hargreaves McIntyre into the market for craft, with a specific focus on contemporary fine craft.

2 Market sizes are calculated using the 2008 *Mid-year population estimates* the most up-to-date population estimate available at the time of writing.

In order to create a replicable methodology for the future, the research in this study was conducted using online, self-completion questionnaires. Because the *Making it to Market* study had used telephone interviews, we cannot directly compare changes in market size between 2004 and 2010. The results do however, provide us with indications of growth in the craft market.

1.3 Market size[3]

3 Please see section 2.3 of the main report for definitions of terms including 'contemporary' and 'cutting edge' craft.

The market for craft in England is substantial:

- 40% of adults in England (16.9 million people) have purchased a craft object.
- A further 23% (9.6 million people) would consider buying a craft object, but have not done so yet.
- Combined, these active and potential buyers indicate a total market for craft – comprising heritage, traditional and contemporary craft – of 26.5 million people, or 63% of all adults in England.
- 5.6 million craft pieces are purchased each year, by people living in England.
- A conservative estimate of the total value of these annual sales is £913m.

Market demand is greatest for contemporary and 'cutting edge' craft:

- 97% of currently active craft buyers state that they either currently buy or would consider buying contemporary craft, and 90% state that they either currently buy or would consider buying 'cutting edge' work.
- 7% of currently active buyers 'only or mostly' buy 'cutting edge' contemporary craft.
- 10% of active buyers state they would buy contemporary craft but not 'cutting edge' work.

There is significant latent demand within the marketplace:

- Over a third (36%) of people expressing an interest in buying craft have yet to make a craft purchase.
- Contemporary and 'cutting edge' craft is equally attractive to these potential buyers as it is to currently active buyers. 97% of potential buyers state they would buy contemporary craft, and 93% state they would buy 'cutting edge' work.

1.4 Characteristics of the craft market (craft buyers and potential buyers)

4 Results taken from online population survey conducted in 2010 (see 1.2)

Compared to the rest of the adult population of England who have not bought and would not consider buying craft, those in the craft market[4] display the following characteristics:

- They are more likely to be female (57% compared to 35% of those not in the market), and to be educated to degree level or higher (25% compared to 16% of those not in the market).
- They are twice as likely to be culturally active than the population as a whole, with 18% having attended a cultural event in the past 12 months compared to 9% of those who state they are not in the market.

— They are more likely to have general or specialist knowledge about cultural subjects, and to have some type of professional or academic interest in cultural subjects. For example, 18% state a professional or academic interest in art or art history, compared to 7% of those who are not in the market.
— They appear to have a more open and curious mind set, with 26% strongly agreeing with the statement, 'I like to be surrounded by different people, cultures, ideas and lifestyles,' compared to 10% of those not interested in buying craft.
— They are also more likely to strongly agree that 'the arts and culture improve quality of life for us all' than those not interested in buying craft (16% versus 2% of those not in the market).

Buyers and potential buyers of craft differ in terms of demographic, interests and outlook. Buyers display the following characteristics:

— They are slightly older than potential buyers: 53% are aged 45 or above.
— They are more likely to work in the education, health and charity sectors.
— They are more frequent attendees at a wider range of cultural events.
— They are more likely to be working in craft or related sectors: 1 in 20 state a professional or academic involvement with craft.
— They appear to be more willing to actively pursue their interests. For example, 22% strongly agree with the statement, 'I like to try things that are new to me' compared to 14% of potential buyers.
— They are also more active in seeking out new cultural experiences and more likely to see culture as a high priority: 13% strongly agree with the statement, 'the arts and culture are essential to my life'.
— There is a correlation between participating in craft activities and buying craft: 21% of buyers have taken part in a craft activity six or more times in the past 12 months, compared to 9% of potential buyers.

Potential buyers display the following characteristics:

— They are significantly younger than buyers, and are also younger than those not in the market: 59% are aged 44 or under, compared to 47% of buyers and 54% of those not in the market.
— They are less frequent attendees at cultural events than buyers. They are also less likely to actively participate in cultural activities, and in craft activities in particular.
— They appear to take a more cautious, passive approach to new experiences than buyers, and are more likely to be guided by the opinions of others' with only 18% strongly agreeing with the statement, 'I am happy to do my own thing regardless of what others might think,' compared to 26% of buyers.

1.5 Perceptions of craft[5]

5 Results taken from the detailed survey of 416 buyers and potential buyers.

In the survey of those in the craft market, i.e. buyers and potential buyers, respondents were given a list of 29 words and asked to select the attributes that they would associate with each of four categories – craft, design, luxury brands and art.

The results suggest that whilst the word 'craft' shares some perceived attributes with these related fields, it also has a distinctive set of associations of its own.

The word 'craft' is most closely associated with terms suggesting authenticity and quality, particularly the words 'handmade', 'workmanship' and 'genuine'. It is also the word most likely to be seen as associated with the terms 'personal' and 'for everyone'.

1.6 Considering a craft purchase

- Selected from a list, the reasons for buying or considering buying craft for half or more of the sample are that: ‘Craft makes a unique gift’ (58%), ‘I admire the human skill involved / want to keep craft skills alive’ (55%) and ‘Beautiful objects appeal to me’ (49%).
- The reasons chosen by over a third of the sample are: ‘It means I own something that nobody else does’ (41%), ‘I like to have beautiful objects in my home’ (39%) and ‘To support craft makers’ (35%).
- Most people considering a craft purchase say they do so by browsing at shops, galleries, exhibitions and / or fairs. Browsing online for information is more popular amongst potential buyers than amongst current, active buyers, who are most likely to seek information from Open Studios events.

1.7 Buying craft

- Whilst buyers’ stated preference for ‘real world’ retail environments becomes more pronounced when it comes to actual purchasing, it should be noted that interest in buying online has roughly doubled since 2004.
- Most craft purchases are incidental and unplanned. When asked about the last piece of craft they bought, the majority of buyers agree with the statement, ‘[It was] just something that I came across in passing that caught my eye when I was out and about’.
- The most common triggers to a first craft purchase are a visit to a fair, exhibition or event, and the search for – or opportunity to buy – a unique gift.
- The majority of buyers (63%) say they are willing to take risks with their craft purchases, and specifically to make purchases without the endorsement of others or prior knowledge of a maker’s work. Potential buyers demonstrate a greater aversion to risk in relation to new experiences in general, which influences their attitudes towards craft purchasing.
- Potential buyers are likely to value craft objects for their uniqueness and potential future value. They are less likely than buyers to value the objects’ aesthetic and material qualities, or the creative processes, ideas and stories they embody. Only 10% of potential buyers agree with the statement ‘I am drawn in by the story behind the object or the ideas it represents’, compared to 24% of active buyers.
- The most commonly stated obstacles to craft purchasing are the perceived expense of craft objects (for 29% of potential buyers), and prioritisation of other areas of spending (for 23%). 21% of potential buyers state that they have never purchased craft because they have ‘just never seen a piece of craft they like enough.’

1.8 Consumer trends relevant to the craft market

Whilst consumer trends commentators may not agree on exactly how the current economic circumstances will affect the amount that consumers are spending in the short and long term, sources reviewed for this study are in broad consensus that recent events have had a profound effect on how and why people spend.

This research shows that ‘discretionary’ spend on objects has not fallen uniformly across the craft market: a small proportion of buyers have actually increased their spend over the past five years. Overall, craft spending appears to be holding up better than spending on related categories – design, art and luxury goods.

Analysis of our survey data compared with a review of the consumer trends literature, suggests that the following identified key trends are influencing or likely to have an effect on the evolution of the craft market:

- **Personalisation:** as craft is perceived as more 'personal' and 'individual' than design, art or luxury goods, craft businesses can fulfil consumers' need to demonstrate individualism through their purchasing choices. Craft businesses have the opportunity to extend current market reach by emphasising the uniqueness of craft pieces, their products, and to create new markets by connecting craft to niche lifestyles. Creating opportunities for the buyer to influence and personalise the piece's development could also enable makers to benefit from this trend.
- **Authenticity:** with increasing demand for 'authentic' products and experiences, consumer perceptions of craft as more 'genuine' than design, art or luxury goods is a significant asset. Eliciting the hidden stories, ideas, skills and provenance of craft objects at the point of sale, could become more important as this trend develops.
- **Ethical consumption:** for some consumers, craft represents an opportunity to buy desirable, luxury goods without compromise on ethical issues such as sustainability, human rights and fair trade. For craft businesses consciously employing sustainable or ethical practices and materials, this market niche offers significant future potential.
- **The experience economy:** increasing consumer interest in spending on experiences – and on products which signify or remind the buyer of an experience – are creating new and rich opportunities for craft businesses. Our survey indicates strong potential to grow the market, both by offering integrated buying / leisure making opportunities, and by using leisure making to increase the appreciation of the skills valued by buyers.
- **New ways of signalling connoisseurship:** the 'luxury shame' resulting from economic downturn has led some consumers to look for new ways to signal connoisseurship, beyond engagement with brands and traditional luxury goods. This trend creates new opportunities for craft businesses: 68% of those in the craft market agree that they are 'less likely to buy luxury brands now compared to five years ago', whilst only 43% state that they are now 'less likely to buy craft.'

1.9 Implications for the future of the craft market

Our analysis suggests a number of considerations for makers and other craft sector businesses and organisations seeking to convert those with an interest in craft into active buyers, and to increase spending by current craft buyers:

- Specific opportunities exist to attract new buyers to craft by targeting consumers of luxury goods and brands who are looking to signal connoisseurship in new ways, particularly those with strong or emerging ethical motivations.
- There is rich potential for social media tools to encourage and support a first craft purchase because of their potential to build potential buyers' confidence and overcome risk aversion, through peer endorsement.
- Connecting craft to specific lifestyle interests and market niches, such as vintage fashion or sustainability, could enable potential and lapsed buyers to meet their existing needs through craft.

- Most potential buyers would not consider attending the craft events which tend to trigger an individual's first craft purchase. Introducing craft within bigger events and festivals, for example – or through temporary retail spaces within a larger retail offer – could help to overcome this barrier to entering the craft market.
- Gift buying is the second strongest trigger to making a first craft purchase, and opportunities to promote and facilitate the buying of craft gifts in non-specialist retail settings – could also encourage potential buyers.
- Potential buyers need to be encouraged to see craft as affordable, and to be presented with options under £100. Extending the reach of the Own Art or similar schemes could also help to overcome the price barrier for new buyers.
- Because active buyers display a high degree of curiosity and confidence about engaging in new interests and experiences, the provision of new ways of experiencing and buying craft could increase the frequency of purchases made.
- In particular, because buyers are active participants in a range of cultural activities, they may respond well to buying opportunities which connect craft with their other cultural interests (e.g retailers located in concert venues or at literature festivals).
- In contrast to potential and lapsed buyers, current buyers appreciate the 'hidden stories', ideas and skills behind craft objects. Eliciting these 'hidden stories' – and supporting buyers to discover them for themselves – could encourage purchasing amongst current buyers, and collecting in particular.
- Because current buyers constitute a highly educated market with a strong professional interest in the arts as well as a curious mind set, opportunities to gain a new and unusual perspective on craft – such as visits to makers' studios – could encourage purchasing.
- There is potential to encourage purchasing, and collecting in particular, by exploring new ways in which the interaction between buyer and maker can create a personalised object. Enabling buyers to choose between pre-set options or to discuss the object as it develops, could offer viable alternatives to the existing models of purchase or commission.
- The correlation between buying craft and making craft (as a leisure activity) suggests that encouraging participation in leisure craft activities amongst potential buyers could extend the market for craft objects, in the medium to long term.

2.0 Introduction to the research project

2.1 Aims of this research

The key objectives for this research project are to understand:

1. The current size and growth potential of the contemporary craft market in England
2. Within this market, where the strongest growth potential can be found
3. How this picture (points 1 and 2 above) has changed since 2004
4. How we might expect the contemporary craft market to evolve during the period 2010 – 2015, in response to broader consumer trends.

In order to meet these objectives, the Crafts Council commissioned Morris Hargreaves McIntyre to:

— Update the key features of the contemporary craft market listed in *Making it to Market*[6] (i.e. key points 1–6 and 10–12 from the executive summary)
— Update the market quantification on page 14 of the *Making it to Market* executive summary
— Identify the characteristics of craft buyers and potential buyers
— Draw comparisons between *Making it to Market* and this research project, together with any other relevant sector research
— Interpret the data analysis in relation to identified macro consumer trends.

2.2 Research methodology

Questions about craft buying on a cultural omnibus survey

Six questions about craft buying were included in a nationally-representative UK omnibus survey about cultural engagement, conducted online by Morris Hargreaves McIntyre in April 2010.

The full survey was conducted with 7,000 UK adults. The omnibus data was weighted using cultural participation data from the most recent full year of the DCMS *Taking Part*[7] programme, to make it as robust as possible.

The six craft buying questions were answered by 4,259 adults in England. Given this sample size, we can be confident that the results presented are 'true' to within +/- 1.5 percentage points of the % shown in the report.

The results show the proportion of adults in England who have bought or would consider buying craft. Because the sample is large and nationally-representative, we are able to use these results to estimate the actual size of the market (i.e. the number of people who have bought or would consider buying craft) by using population statistics[8].

The results also provide demographic information about buyers and potential buyers, as well as some insights into their attitudes and cultural habits from other questions on the omnibus survey.

Consumer trends desk research and workshop

We identified major consumer trends from current literature, relevant to the craft market, and refined these in a workshop with commentators from the craft, design, cultural retail and luxury retail sectors[9]. We then developed attitudinal and behavioural statements based on the identified trends, which would enable us to test active and lapsed buyers' responses through our survey of craft buyers and potential buyers (see below). As an example, one of the ways in which we tested buyers' reactions to the 'authenticity' trend

6 Morris Hargreaves McIntyre (2006), *Making it to Market: developing the market for contemporary craft*, Arts Council England.

7 BMRB (2009), *Taking Part 2007/8*, DCMS. Taken from the Taking Part diagnostic tool, NETQuest. Please note: the 2007/8 data used here is the most recent full year data set published for the Taking Part survey at the time of writing.

8 English adult population 2008 mid-year estimate = 42,413,000. Taken from Office of National Statistics (15 May 2010), *Mid-year Population Estimates 2008*. Please note: this is the most up-to-date population estimate available at the time of writing and was conducted in 2004.

9 See appendix 1 for a list of workshop participants

was to ask how strongly they agreed with the statement, 'if an object looks handmade, it's important to me that it really is handmade.'

Survey with people in the market for buying craft

We followed the cultural omnibus survey with an in-depth survey of 416 people in the craft market. To qualify for the survey, respondents had to have either bought craft or express interest in buying it in future.

The results tell us about buyers' and potential buyers':

— perceptions of craft
— attitudes to buying objects and spending in general, which help us explore how consumer trends might manifest themselves in the craft market
— attitudes and motivations for purchasing craft
— conditions and obstacles to purchasing craft
— attitudes and behaviour in relation to pricing and to retail channels for craft.

These results indicate the attitudes, behaviours and motivations of craft buyers and potential buyers but cannot be extrapolated out to the wider UK adult population: given the sample size, we can be confident that the results presented are 'true' of people in the craft market to within +/- 4.8 percentage points[10] of the % shown in the report.

The survey was conducted online in April 2010, and results were weighted according to the market size data from the omnibus survey to make the results compatible.

10 Based on 50%, which gives the maximum confidence interval. On a result of 10%, the confidence interval reduces to +/- 2.88 percentage points.

Analysis with comparator data

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

The research methods used in this study however, are different to those used for *Making it to Market*, and it is therefore not possible to make a like-for-like comparison between the data sets. Key points of difference are:

— This study employs online survey methods, in contrast to *Making it to Market,* which employed a telephone survey. Given the influence of online surveying on interviewees' responses to standard questions[11], it is likely that the change in survey methodology is largely responsible for the apparent scale of growth of the contemporary craft market between 2004 and 2010 (see section 3.3).
— The *Making it to Market* population survey undertook a detailed exploration of craft purchasing, with questions about the individual categories of craft (e.g. furniture, ceramics etc) people had bought. Whilst questions in the 2010 study were kept identical to those asked in 2004 wherever possible, there was some difference in the degree of detail.
— The omnibus results in this study are weighted using data on cultural participation from the most recent full year of the Department for Culture, Media and Sport (DCMS)'s *Taking Part* data, which is based on a larger sample of face-to-face interviews. When the *Making it to Market* survey was carried out in 2004, no such comprehensive national dataset was available.

11 For example, AAPOR Executive Council (March 2010), *AAPOR Report on Online Panels*, and Cooke, M. et al, 'A hybrid online and offline approach to market measurement studies' in *International Journal of Market Research*, Vol. 51, No. 1, 2009, pp.29–48

2.3 Definitions of terms

The terms used within the research process are adopted for consistency with *Making it to Market*: survey respondents are described both by the extent of their activity within the craft marketplace, and by the type of craft which interests them as a consumer.

In describing the extent of their activity as consumers in the craft market, we categorise people as 'potential buyers' (people who have never purchased craft, but state they would consider doing so in future) and 'buyers' (people who have purchased craft at any time). Within the 'buyers' category, we also talk about 'active buyers' (people who have purchased craft within the past two years) and 'lapsed buyers' (people whose last craft purchase took place more than two years ago).

In order to understand the type of craft which these buyers and potential buyers have bought or would consider buying in future, we adopt three key terms:

— **Craft:** We use the definition put to survey respondents: 'By original, handmade craft, we mean any object that has been made by hand by a craft maker, including ceramics, wood, glass, metalwork, furniture and jewellery.'
— **Contemporary craft:** For the purposes of this report, we use the definition put to survey respondents: 'Original handmade craft that was recently made and/or produced by a living craft maker.'
— **'Cutting-edge' contemporary craft:** We asked survey respondents: 'There are some craft makers who are recognised as being at the 'cutting-edge' of contemporary craft and whose work is acclaimed by people in contemporary craft circles. If the cost was within your price range, would you buy work by this kind of craft maker?' For this general survey audience, we chose not to use the full definition of this type of critically acclaimed work described in *Making it to Market* as 'contemporary fine craft', which refers to work which is high in quality, innovative in its use of materials and aesthetic vision, and the result of an individual process of investigation and critical enquiry.

In addition, we use the following general terms:

— Makers: people who define themselves as professional designers and makers of craft, and / or of unique or limited edition, handmade objects.
— Market: all buyers and potential buyers.
— Potential market: all potential buyers.
— Sector: all people, businesses and organisations involved professionally in craft.
— Marketplace: the place of exchange between makers, buyers and suppliers.

3.0 The size of the market for craft in England

This section examines:

— The current size and growth potential of the contemporary craft market in England
— Areas where the strongest growth potential can be found within this market
— How this picture has changed since 2004.

3.1 Key market size points

Our analysis enables us to estimate the size of the current and potential market for all craft, contemporary craft, and 'cutting edge' contemporary craft[12].

12 See section 2.3. for a definition of terms

A full break-down of this analysis is given by the chart diagram overleaf. The main points emerging from the analysis are as follows:

The market for craft in England is substantial:

— 40% of adults in England (16.9 million people) have purchased a craft object.
— A further 23% (9.6 million people) would consider buying a craft object, but have not done so yet.
— Combined, these active and potential buyers indicate a total market for craft – including heritage, traditional and contemporary craft – of 26.5 million people, or 63% of all adults in England.

Market demand is greatest for contemporary and 'cutting edge' work:

— 97% of currently active buyers state that they either buy, or would consider buying contemporary craft, and 90% either buy or would consider buying 'cutting edge' work.
— Most people (90% of the total market) say they currently purchase – or are interested in purchasing – a mixture of contemporary and 'cutting edge' work. Only 7% of the market would only / mostly buy 'cutting edge' work, and a similar proportion (7.2%) say they would buy contemporary craft but not 'cutting edge' work.

There is significant latent demand within the marketplace:

— 36% of people expressing an interest in buying craft have yet to make a craft purchase.
— Contemporary and 'cutting edge' craft is equally attractive to these potential buyers as it is to currently active buyers. 97% of potential buyers state they would buy contemporary craft, and 93% state they would buy 'cutting edge' work.

3.2 Overall size and shape of the craft market in England

The results in this section are drawn from a nationally-representative UK omnibus survey[13]. Population statistics were used to calculate estimates of market size[14]. The chart below summarises the key findings for 2010:

13 Further information on research methods can be found in section 2.2.

14 English adult population 2008 mid-year estimate = 42,413,000. Taken from Office of National Statistics (13/05/10), *Mid Year Population Estimates 2008.* Please note: this is the most up-to-date population estimate available at the time of writing.

Figure 1: Estimated size of the craft market in England 2010

Would buy 'cutting edge' contemporary craft **90%** of market	1,750K (7%)	Bought contemporary craft and would only / mostly buy 'cutting edge' contemporary craft
	3,340K (13%)	Bought contemporary craft and would equally buy 'cutting edge' contemporary craft as any other
	4,162K (16%)	Bought contemporary craft and would sometimes buy 'cutting edge' contemporary craft
	5,964K (22%)	Bought craft and would consider buying 'cutting edge' contemporary craft
	8,721K (33%)	Never bought craft and would consider buying 'cutting edge' contemporary craft
Would buy contemporary craft **7.2%** of market	716K (3%)	Bought contemporary craft, but would not buy 'cutting edge' contemporary craft
	530K (2%)	Bought craft but would not buy 'cutting edge' contemporary craft
	557K (2%)	Never bought craft and would not buy 'cutting edge' contemporary craft
Would buy craft **2.9%** of market	451K (2%)	Bought craft but would not buy 'cutting edge' contemporary craft
	315K (1%)	Never bought craft and would not buy contemporary craft

Market for craft: 26,508K (100%)

63% of adult population of England

3.3 Comparing the craft market in 2010 with 2004 data

In 2006, *Making it to Market* identified the total market for craft – including both current and potential buyers and based on 2004 data – at 11.3 million people, or 29% of the then adult population of England.

Whilst this figure is considerably lower than the 63% we identify in 2010, direct comparisons are precluded by differences in methodology and survey design between the 2006 and 2010 studies[15]. In particular, the transition from telephone to online surveys is likely to have influenced participants' responses. Because they were undertaken unguided by participants, the 2010 online surveys are likely to have encouraged a broad definition of craft encompassing heritage, traditional and contemporary work. In comparison, in the 2006 study participants were encouraged to discuss terms and definitions with the telephone interviewer, and to describe their craft purchasing / non-purchasing in accordance with a centrally held definition of 'contemporary craft'.

Our interpretation, based on the close correlation between consumer attitudes towards craft[16], acknowledging broad consumer trends[17], is that the market for craft has increased since 2006 and continues to grow. Whilst use of online questionnaires has created a cost-effective and comparable methodology for future use, however, it does preclude us from substantiating the apparent scale of growth with statistical data.

15 See section 2.2

16 See section 6

17 See section 9

4.0 Volume and value of the market

4.1 How volume and value are calculated

In order to estimate the current value of the contemporary craft market we asked respondents to our detailed survey of craft buyers:

- How many purchases they had made over the past two years[18]
- The price paid for their latest purchase[18]
- Whether that purchase had been made in England[19]
- Whether it was new or recently made[20]
- Whether it was contemporary in style[20]

We then took the average prices and applied these to the market sizes estimated from the wider omnibus survey, to arrive at a calculation for an annual figure.

18 Asked of active buyers in detailed survey = 178 responses

19 Asked of all buyers in detailed survey = 265 responses

20 Asked of buyers in omnibus survey = 2,188 responses

4.2 Estimated volume and value

An estimated 5.6 million pieces of craft are purchased by people living in England in an average year, and a conservative estimate of the value of these sales is £913 million.

Because the survey questions relating to purchasing were answered by a relatively small number of respondents, this estimate should be seen as indicative, and not for direct comparison with the 2004 data.

5.0 Characteristics of craft buyers and potential buyers

This section looks at the characteristics of craft buyers and potential buyers. All results in this section are taken from the omnibus study (base = 4,259) except where stated. See section 2.2 for details.

5.1 What are the shared characteristics of the market (buyers and potential buyers)?

People who have bought craft – or would consider buying craft – display distinctive characteristics when compared to the rest of the population. They are:

More likely to be female

57% of people in the craft market are female, compared to 35% of respondents not interested in buying craft.

More likely to be educated to degree level

25% of people in the craft market have a first degree or higher, compared to 16% of respondents with no interest in buying craft.

More likely to be culturally active

Overall, people in the craft market are more culturally active than those who are not in the market. They are twice as likely as those not in the market to have attended a cultural event in the past 12 months (18% versus 9%).

They are more likely to be actively participating in cultural activities than those not interested in buying: 77% of respondents in the craft market had participated in a cultural activity at least 6 times in the past 12 months, compared to 54% of those not interested in buying.

They are also more likely to have general or specialist knowledge about cultural subjects than those not in the market. For example, 59% of those in the craft market have general or specialist knowledge of music and opera, compared to 41% of those not interested in buying.

Positive attitudes towards culture are also common: 16% of those in the craft market agree that 'the arts and culture improve quality of life for us all' compared to 2% of those not in the market.

More likely to be culture sector professionals

People with a professional or academic interest in cultural subjects are more likely to be in the craft market than those without. For example, 18% of those in the market have a professional or academic interest in art or art history, compared to 7% of people who have no interest in buying craft.

Outward looking

Those in the market display a more open and curious mindset than those not interested in buying. For example, over a quarter of those in the market strongly agree with the statement that 'I like to be surrounded by different people, cultures, ideas and lifestyles' compared to 10% of those not in the market.

Willingness to try out and learn new things is also pronounced within the craft market: compared to 10% of those not in the market, 17–18% of craft buyers and potential buyers strongly agree that they try unusual or new experiences. In addition, 54% of those in the market agree strongly that it is important to continue learning throughout a lifetime, compared to 35% of those not in the market.

This attraction to the new is particularly marked for those in the craft market, when it comes to the arts: 9% agree that 'in the arts, I like to try new ideas and innovations', compared to 2% of those not in the market.

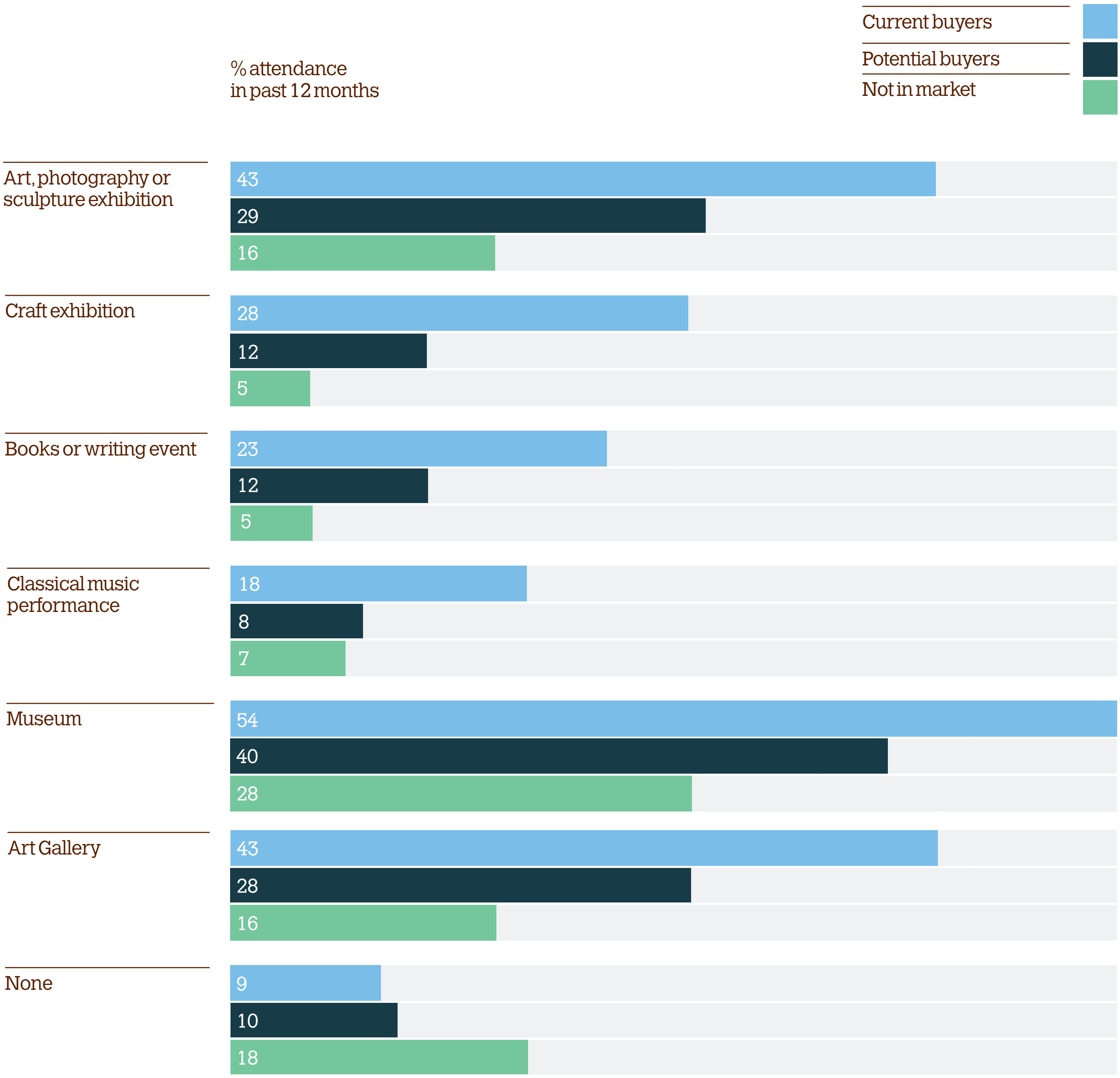
5.2 Who are the craft buyers?

Like the craft market in general, but more so

Buyers are more likely to be female (60%) and highly educated than potential buyers: 29% hold a first degree or higher.

They are more frequent attendees at a wider range of cultural events compared to potential buyers, as shown by the chart below:

Base – 4259



Buyers are also more likely to be actively participating in cultural activities (81% having participated in a cultural activity at least six times in the past six months) than potential buyers.

More mature and / or retired

53% of buyers are aged 45 or over, compared to 41% of potential buyers. Buyers are also more likely to be retired than potential buyers.

More likely to work in education, health and charity sectors

Buyers are more likely to work in the education, health and voluntary sectors than potential buyers and those not interested in buying: 23% of buyers work in these sectors compared to 15% of respondents who had never bought craft.

More likely to be sector specialists

Buyers are more likely to be working in the craft or related sectors than other respondents. 1 in 5 (21%) say they have a professional or academic interest in art or art history, and 1 in 20 (5%[21]) say they have a professional or academic involvement with craft. Partly as a result, 7% of buyers say they have specialist knowledge of craft, compared to 5% of potential buyers[22].

21 Taken from detailed survey with craft market, 416 responses

22 Asked of buyers in omnibus survey = 2,188 responses

More likely to be actively participating in craft activities

There is a particular correlation between participation in craft activities (such as embroidery, knitting, furniture making, calligraphy, ceramics and jewellery) and buying craft: 21% of buyers have taken part in craft activities at least six times in the past 12 months, compared to 9% of potential buyers and 5% of those not in the market.

Proactive attitude to arts and culture

Consistent with their high levels of cultural attendance and participation, buyers tend to be much more active in seeking out new cultural experiences than both potential buyers and those not interested in buying. Culture is a high priority for them. In our survey:

- 12% of buyers strongly agree with the statement ‘in the arts I like to try new ideas and innovations’ (compared to 5% who have never bought).
- 13% strongly agree with the statement ‘the arts and culture are essential to my life’ (compared to 5% who have never bought).
- 11% strongly agree with the statement ‘I actively seek out information on what’s on in cultural venues’ (compared to 5% who have never bought).
- 12% strongly agree with the statement ‘I would describe my tastes in the arts as eclectic’ (compared to 4% who have never bought).

Exploratory, independent mindset

Buyers appear to be more open and more willing to actively pursue their interests, than those in the potential market:

- 21% strongly agree with the statement 'I will try things that are unusual' (compared to 13% of potential buyers).
- 22% strongly agree with the statement 'I like to try things that are new to me' (compared to 14% of potential buyers).
- 58% strongly agree with the statement 'It is important to continue to learn new things throughout your life' (compared to 49% of potential buyers, 35% not in the market)
- 40% strongly agree with the statement 'It is important to be well informed about. things' (compared to 28% of potential buyers and 26% of those not in the market).

Significantly, buyers appear to be willing to make independent decisions regardless of peer opinion: 26% strongly agree with the statement that 'I am happy to do my own thing regardless of what others might think' compared to 18% of potential buyers.

Key differences between active and lapsed buyers

Active buyers (those who have bought in the past two years) are even more likely than lapsed buyers (those who made their most recent purchase over two years ago) to:

- Be educated to degree level or higher (31% versus 26% of lapsed buyers)
- Have been to a wide range of cultural events in the past 12 months: just 4% have not been to any cultural event in 12 months, compared to 13% of lapsed buyers
- Have actively participated in a craft activity at least six times in the past 12 months (29% of active buyers versus 16% of lapsed buyers)
- Have a very outward-looking, active and curious mindset: 31% strongly agree with the statement that 'I like to pursue a life of challenge, novelty and change', compared to 13% of lapsed buyers. Active buyers also have a highly exploratory attitude to arts and culture

5.3 Who are the potential buyers?

Similar to the craft market in general, but slightly less so

Compared to buyers, potential buyers are less likely to be female (53%) and less likely to be highly educated (21% hold a first degree or higher). They are also less likely to be cultural professionals or to have specialist knowledge of the craft sector.

Potential buyers are less frequent attendees at a narrower range of cultural events compared to buyers, as shown in figure 3 above. They are also less likely than buyers to be actively participating in cultural activities. 70% have participated in a cultural activity at least six times in the past six months, compared to 81% of buyers.

Less likely to be actively participating in craft activities

9% of potential buyers have actively participated in craft activities six or more times in the past 12 months compared to 21% of buyers.

Younger

Potential buyers are significantly younger than both buyers and those not in the market: 59% are aged 44 or under, compared to 47% of buyers and 54% of those not in the market.

A more cautious approach to new experiences and culture

Potential buyers are less likely than buyers to agree positively with attitudinal statements about seeking out new cultural experiences. This suggests that although potential buyers are far more curious about culture than those not in the market, they take a more cautious, or passive approach to their interests than buyers.

Potential buyers are more likely to be guided by the opinions of others than buyers or even those not in the market: only 18% strongly agree with the statement that 'I am happy to do my own thing regardless of what others might think' compared to 26% of buyers.

6.0 Perceptions of craft

23 The craft market includes buyers (people who have bought craft) and potential buyers (people who have never bought craft, but would consider doing so in future).

This section explores how craft is seen by those in the market for buying craft[23], in comparison with other related categories of objects or goods.

All results in this section are taken from our detailed survey of 416 people in the craft market (see section 2.2 for more detail).

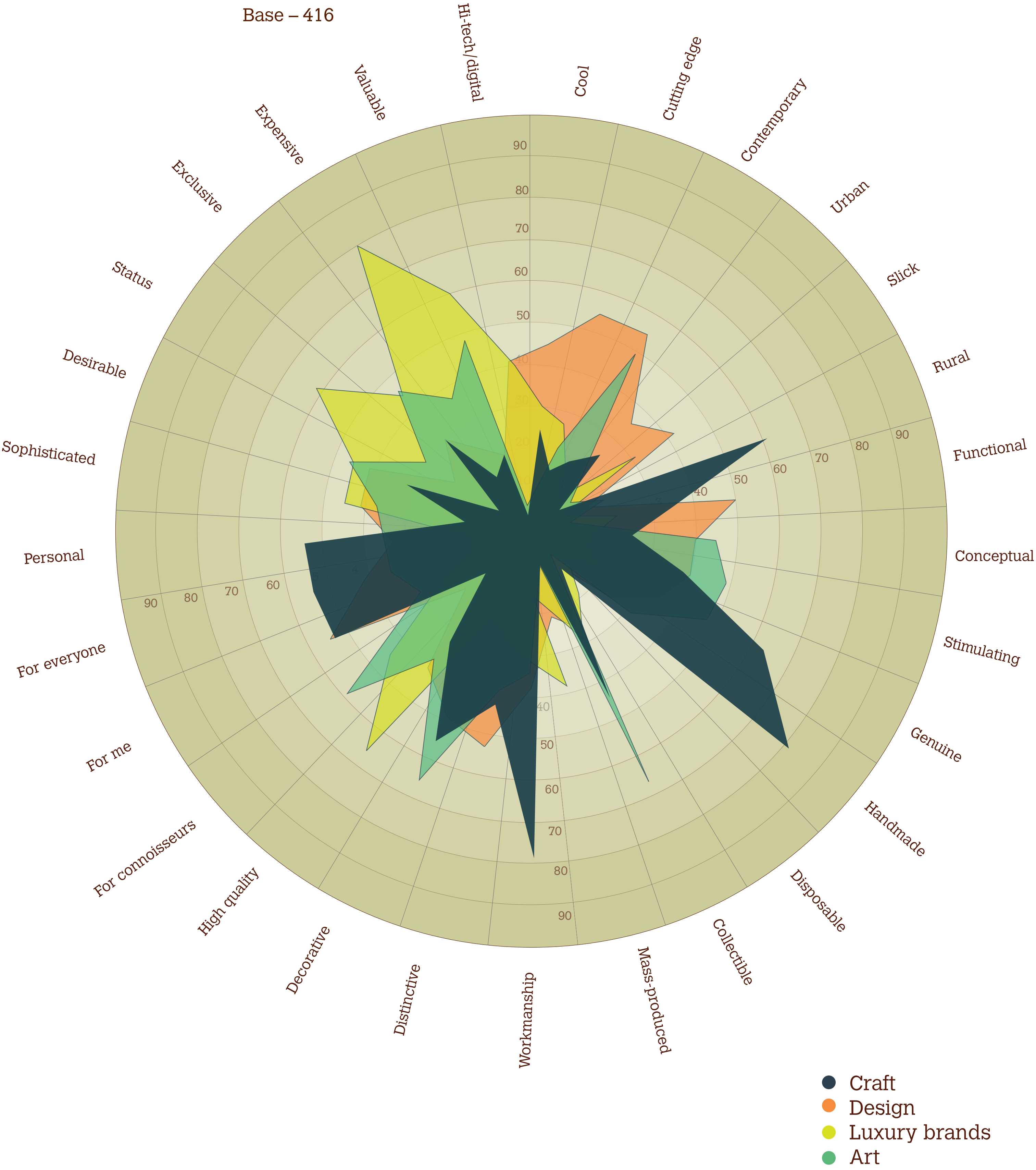
Respondents were asked to consider four categories of objects or goods – craft, design, luxury brands and art – and to select the attributes that they associate with each from a list of 29 words.

The chart below (Figure 3) shows the qualities that people in the craft market associate with craft, design, luxury brands and art.

Whilst craft shares some perceived attributes with related categories, it also has a distinctive set of associations of its own. The results suggest craft is most closely associated with terms which imply authenticity and quality: 'handmade', 'workmanship' and 'genuine', for example. It is also seen as being the most 'personal' of the categories, and is the category thought of as most likely to be 'for everyone'.

Figure 3: Which of these words do you associate with craft/design/luxury brands/art?

Base – 416



The table below shows the six terms most commonly associated with craft, and compares the results to design, luxury brands and art.

Most frequently-selected attributes for craft %

Base	416			
Attribute	**Craft**	**Design**	**Luxury brands**	**Art**
Handmade	82	25	12	31
Workmanship	79	38	16	34
Genuine	63	36	19	48
Rural	61	14	8	19
For everyone	54	41	16	36
Personal	54	33	16	35

Craft was the category least likely to be associated by people in the craft market with the term 'hi-tech/ digital', or with terms that suggest rarefied appeal, such as 'status', 'expensive' and 'for connoisseurs'. Craft was also the least likely category to be described as 'mass produced'.

The table below shows the six least popular terms associated with craft, and compares the results to design, luxury brands and art.

Least frequently-selected attributes for craft

Base	416			
Attribute	**Craft**	**Design**	**Luxury brands**	**Art**
Hi-tech / digital	3%	41%	40%	6%
Status	8%	22%	62%	30%
Slick	8%	42%	31%	12%
Mass produced	8%	21%	38%	9%
For connoisseurs	15%	21%	45%	59%
Expensive	16%	23%	80%	37%

As the chart shows, design is most likely to be described as being 'cutting-edge', 'contemporary', 'functional', 'for me' and 'distinctive'.

Luxury brands are most likely to be associated with the terms ‘expensive’, ‘status’, ‘high quality’ and ‘sophisticated’, but are not seen as vastly more desirable than other categories.

Art is most likely to be described as being ‘collectible’, ‘decorative’, ‘for connoisseurs’, ‘contemporary’, ‘valuable’ and ‘stimulating’.

Clearly, the selected attributes reflect general perceptions of the current market for contemporary craft amongst craft buyers. As craft production diversifies and new types of work (employing digital technologies, for example) becomes more visible in the marketplace, consumer perceptions may be expected to evolve.

7.0 Buying craft

This section examines the following from the perspective of the craft market and then in more detail for buyers:

— Attitudes and motivations to purchasing craft
— Conditions and obstacles to purchasing craft
— Preferences, attitudes and behaviour in relation to pricing and retail channels

Results in this section are taken from the detailed survey with 416 people in the craft market. Due to the relatively small sample size, these results should be read as indicators of attitudes and behaviours, rather than as robust measures[24].

24 For more information on research methods, see section 2.2.

7.1 Why are people interested in buying craft?

In order to understand what motivates craft purchases, it is useful to explore the needs that buyers and potential buyers are seeking to fulfil through their craft purchasing.

Selecting from a list of options, respondents were asked to select their reasons (single or multiple) to consider buying craft.

As shown below, the four most significant motivations for buying craft are:

1. For a gift
2. Because the buyer admires the skill involved in making the object
3. To fulfil a need for aesthetic beauty
4. To own a unique object.

Differences between buyers and potential buyers, in terms of motivations for buying, are explored in the sections below.

Base	416
Which of the following are reasons why you would consider buying craft?	% of craft market
Craft makes a unique gift	58%
I admire the human skill involved / want to keep craft skills alive	55%
Beautiful objects appeal to me	49%
It means I own something that nobody else does	41%
I like to have beautiful objects in my home	39%
To support craft people / makers	35%
I'm fascinated by the creative process / materials	27%
Unique objects reflect my identity	22%
I like to support new talent	22%
It's an investment / an heirloom of the future	20%
I am drawn in by the story behind the object or the ideas it represents	19%
Buying craft says something about me	16%
Buying craft is an extension of my own making / creativity	16%
A reaction to mass production	12%
Buying craft fulfils my need to collect	12%

7.2 Where would people look for information about craft to buy?

The table below shows that browsing craft objects in shops, galleries, fairs, exhibitions or open studios is the most popular source of information for people interested in buying a craft object, but that online/web sources are also popular.

Base	416
Which of the following information sources would you use when thinking about buying craft?	% of craft market
Browse a shop or gallery	49%
Browse a fair or exhibition	47%
Look on websites that show or sell craft	32%
General web search	30%
Recommendation from a friend	27%
Visit open studios	26%
Search online marketplaces	24%
None of the above / just spontaneous purchase	15%
Reviews and articles in magazines	14%
Recommendation via social network (e.g. Facebook)	7%
Go to library	7%
Read specialist blogs or newspapers	7%
Look in Yellow Pages	4%
Phone a gallery	4%

Differences between buyers and potential buyers in terms of information sources are explored in the sections below.

7.3 Where would people prefer to buy craft from?

Respondents – both buyers and potential buyers – were asked to select all the places where they would consider buying craft.

The table below shows that craft fairs, shops and markets are the preferred suppliers for craft, as in 2004.

Online channels have grown in popularity since 2004 (when 'internet' was selected by just 17% of respondents).

Differences between buyers and potential buyers, in terms of preferred suppliers, are explored in the sections below.

Base – 416	
Where would you consider buying craft from?	% of craft market
Craft fair	69%
Craft / design shop	61%
Craft market / stall	59%
Direct from maker	39%
Art fair	37%
Design fair	37%
Museum / art gallery shop	33%
Individual makers' website	30%
Open studios	26%
Specialist online shop / marketplace	26%
Art exhibition – not in a gallery	25%
Auctions	25%
Through friends / people I know	24%
Department store or other non-specialist shop	19%
Publicly-funded gallery	16%
New graduate exhibitions	14%
Commercial gallery	13%
Mail order – not online	9%
Degree show	7%
Agency	2%

7.4 Buying craft: the buyer's perspective

This section looks at craft buyers' motivations and behaviours.

A wider range of motivations than potential buyers

Buyers are significantly more likely than potential buyers to be motivated by the aesthetic qualities of a piece or the ideas or processes it embodies, agreeing with the statements that:

— 'I am drawn in by the story behind the object or the ideas it represents': 24% versus 10% of potential buyers
— 'Beautiful objects appeal to me': 53% versus 42% of potential buyers
— 'I'm fascinated by the creative process / materials': 31% versus 19% of potential buyers.

In comparison with potential buyers, buyers appear to have developed a wide range of positive associations with craft.

When asked to identify the primary driver to their most recent craft purchases, the following five main motivations emerged as key:

— 17% 'Beautiful objects appeal to me'.
— 15% 'Craft makes a unique gift'.
— 14% 'I admire the human skill involved / want to keep craft skill alive'.
— 9% 'I like to have beautiful objects in my home'.
— 7% 'It means I own something nobody else has'.

Need relatively little endorsement: tend to trust their own judgement

Buyers were asked to select what level of endorsement they would need before deciding to buy a piece of craft. We used the three categories defined in *Making it to Market*: and results are as follows:

— 63% = Risk taker: I would be prepared to take a risk without necessarily knowing the maker, if their work had been recommended
— 31% = Cautious gambler: I would take a limited risk without necessarily knowing the maker, if their work had been recommended
— 4% = Safety first: I would avoid taking risks by only buying work by well-known names which have been recommended.

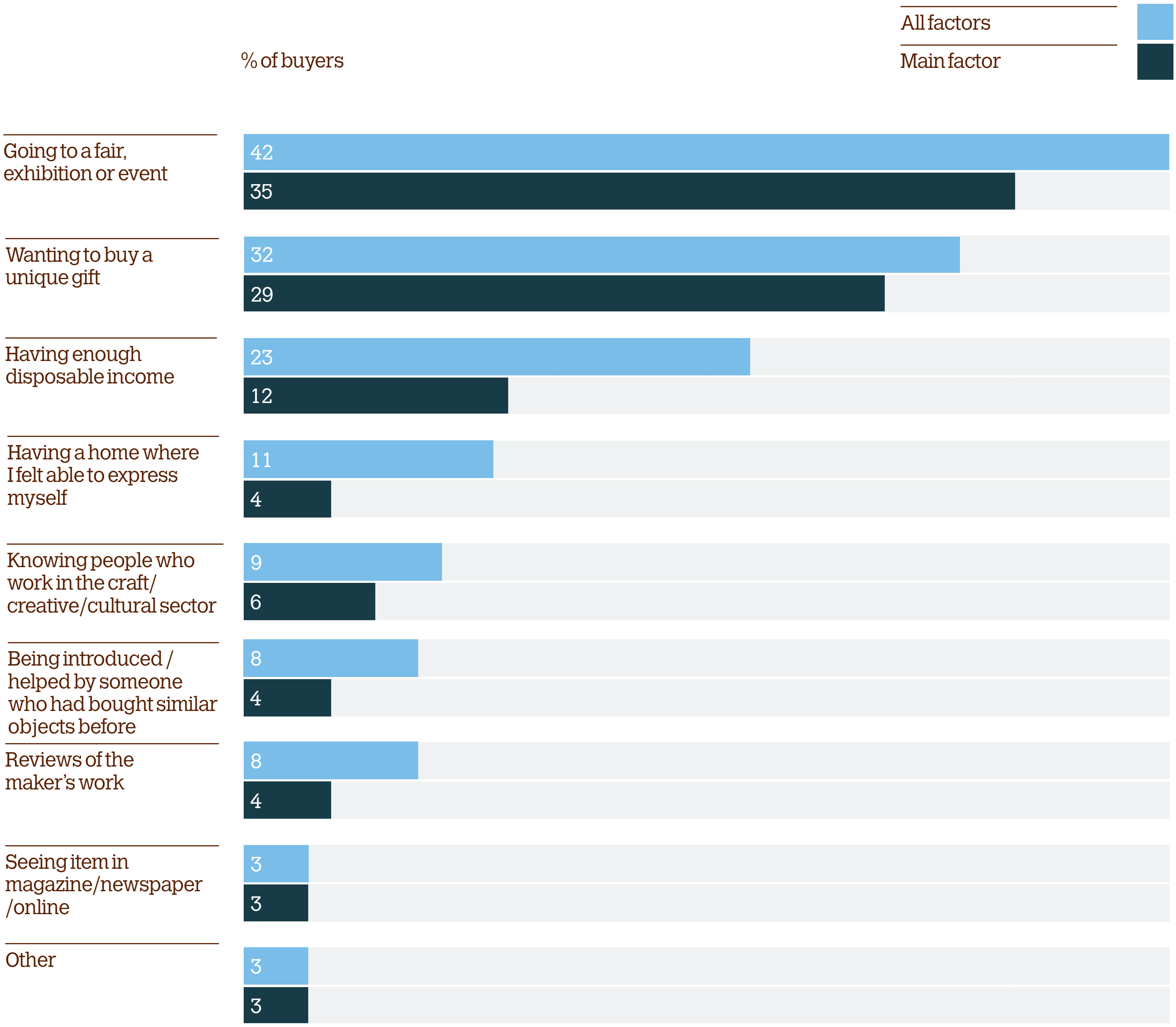
As shown above, the majority of buyers define themselves as Risk Takers: independently-minded individuals who are willing to take risks on purchases without the endorsement of others. This finding is consistent with buyers' responses to attitudinal statements explored at 5.2 above, and is also broadly consistent with those from 2004.

Seeing objects at fairs or exhibitions is the most significant factor in making the first purchase

The chart below shows that going to a fair, exhibition or event is the most significant impetus for individuals making their first craft purchase, followed by the desire to buy a unique gift.

Figure 4: Thinking about buying your FIRST piece of craft, which of these factors influenced you? And which was the most important factor?

Base – 258



Tend to find out about objects for sale by browsing in real life

Compared to potential buyers, buyers are more likely to look for information by visiting Open Studios (29% compared to 21% of potential buyers). They are less likely to consider using online information sources about buying craft (e.g. 27% of buyers would look on websites that sell or show craft, compared to 41% of potential buyers).

When asked about their most recent purchase, over half of buyers (54%) named browsing craft at a shop, gallery, fair or exhibition as the main source of information. Online sources were the main source for 17% of purchases.

Tend not to plan purchases in advance

The results show that most craft purchases are made incidentally.

When asked to consider the circumstances of their last purchase from a list of options, 65% of buyers[25] selected 'it was just something I came across in passing when I was out and about'. In comparison, just 8% were targeting a specific piece ('selecting something I deliberately went searching for – I knew exactly what I wanted in advance'), whilst 7% selected 'I had a type of object in mind but not this one specifically'.

25 Base=265

Despite this finding, at least a quarter of buyers do seek out opportunities to buy craft, if not a particular object: 28% of buyers have travelled to a specific place to look for craft objects to buy.

Consider buying from a wide range of retail channels

Buyers would consider buying from a wider range of places than potential buyers. Whilst craft fairs, shops, exhibitions and markets are the most commonly-named retail channels, buyers are more likely to select a broader range of sources, including art exhibitions, art fairs and direct from makers, as places to buy craft.

Buy five objects or less in a two year period

Active buyers (those who have bought in the past two years) were asked how many pieces they had bought in this time period: the mean average was 3.4 pieces[26].

26 For more information on research methods, see section 2.2.

The vast majority of active buyers (85%) have bought five objects or less in two years, with a further 11% having bought 6 to 10 objects in two years.

Usually spend less than £50

The average amount that buyers had spent on their most recent craft purchase was £296. The table below shows that the most common spend range is much lower: £25 to £50, with the majority (61%) of purchases made being under £50.

Base	199
What was the cost of your most recent purchase of original handmade craft?	% of buyers
£0.01 to £10	13%
£10.01 to £25	19%
£25.01 to £50	29%
£50.01 to £100	9%
£100.01 to £500	25%
£500.01 to £1,000	3%
£1,000.01 to £5,000	3%
£5,000.01 to £10,000	1%
£10,000.01 to £20,000	1%

Buyers were also asked about the greatest amount they had ever spent on craft. On average, the most that buyers have ever spent on a craft item is £1,172. However, the most common maximum for buying is much lower. The table below shows that half (50%) of current buyers have not paid more than £100 for craft and that only 9% have paid more than £1,000.

Base	199
What's the most you have ever spent on one piece of craft?	% of buyers
£0.01 to £10	6%
£10.01 to £25	14%
£25.01 to £50	17%
£50.01 to £100	13%
£100.01 to £500	33%
£500.01 to £1,000	8%
£1,000.01 to £5,000	5%
£5,000.01 to £10,000	2%
£10,000.01 to £20,000	1%
Greater than £20,000	1%

Collecting[27]

Buyers were asked ‘would you describe yourself as a collector?’: 29% agreed. Those who have spent over £100 on craft were more likely to see themselves as collectors than other buyers.

These self-defined collectors[28] were then asked to select the reasons why they collect from a list of options (they could choose more than one option):

— Over half (53%) said it was because ‘I have always bought / collected’.
— A third (33%) that ‘I just like to buy craft’.
— A fifth (22%) said ‘I like to follow a maker, type of work, material or object’.
— A fifth (20%) that ‘I want to build up an investment portfolio’.

27 Note: ‘collecting’ is an imprecise term: we asked respondents to self-define, but there may well be frequent buyers who do not call themselves collectors.

28 Base = 76 responses: results should be treated as indicative only.

7.5 Active versus lapsed buyers: differences in buying attitudes and behaviour

There are some key differences between active buyers (buyers who have bought craft in the past two years) and lapsed buyers (buyers who made their most recent purchase over two years ago)[29].

29 Please note: this means that lapsed buyers are recalling purchases made over two years ago.

Active buyers have a wider range of motivations for buying craft

Active buyers are more likely to be motivated to buy through an appreciation of craft skills, a desire to support makers and motivations around self-expression (‘reflecting my identity’, ‘extension of my own creativity’), than lapsed buyers:

— ‘I admire the human skill involved / want to keep craft skills alive’: 60% versus 52% of lapsed buyers.
— ‘To support craft people / makers’: 42% versus 31% of lapsed buyers.
— ‘I like to support new talent’: 30% versus 22% of lapsed buyers.
— ‘Unique objects reflect my identity’: 26% versus 14% of lapsed buyers.
— ‘Buying craft is an extension of my own making / creativity’: 22% versus 11% of lapsed buyers.
— ‘Buying craft fulfils my need to collect’: 16% versus 7% of lapsed buyers.

Lapsed buyers are more likely to have made incidental purchases

76% of lapsed buyers describe their last purchase as ‘just something I came across in passing that caught my eye when I was out and about’ compared to 65% of active buyers. Lapsed buyers are also less likely to have travelled to a specific place to look for craft objects to buy than active buyers (20% versus 32%).

When looking for information about craft to buy, lapsed buyers are more likely to browse a shop or gallery than active buyers.

Lapsed buyers need more endorsement to make a purchase

When thinking about buying craft, 10% of lapsed buyers define themselves as being in the ‘Safety first’ category (‘I would avoid taking risks by only buying work by well-known names which have been recommended’) compared to 2% of active buyers.

Lapsed buyers are more likely to purchase from less specialised outlets

Active buyers are more likely than lapsed buyers to have made their last craft purchase from a craft or design shop (21% of active buyers versus 11% of lapsed buyers).

Lapsed buyers are more likely to have made their last purchase from a craft stall or market (26% of lapsed buyers versus 15% of active buyers) or a non-specialist shop or department store (8% of lapsed buyers versus 1% of active buyers).

Active buyers buy more expensive craft items

Active buyers also have a much higher range for purchasing: on average, the most they have ever spent on one piece of craft is £1,445 compared to £335 for lapsed buyers. On average, an active buyer's most recent craft purchase cost around double that of a lapsed buyer: £334, compared to £168.

Active buyers are more likely to buy 'contemporary fine craft'[30]

30 For more information on definitions, see section 2.3.

17% of active buyers would only or mostly buy 'cutting-edge' work compared to 8% of lapsed buyers.

2% of active buyers have bought 11 or more pieces in the past two years. These people are also buyers of art, design and luxury brands, and would all only or mostly buy 'cutting-edge' craft.

8.0 Potential buyers' views on buying craft

This section outlines the main characteristics of potential buyers (i.e people who have never bought craft but would consider doing so in future) in terms of:

— Attitudes and motivations to purchasing craft
— Conditions and obstacles to purchase
— Preferences and attitudes in relation to pricing and retail channels.

This provides a picture of what may be preventing potential buyers from purchasing and points towards how they might be encouraged to buy craft.

8.1 Demonstrate a narrower range of motivations than buyers

Potential buyers are as likely as buyers to identify with motivations to purchase craft in terms of uniqueness and potential future value:

— 'It means I own something nobody else has'
— 'It's an investment / heirloom of the future'.

Potential buyers however, are less likely to identify with other craft-buying motivations popular amongst buyers, such as:

— 'I am drawn in by the story behind the object or the ideas it represents'
— 'Beautiful objects appeal to me'
— 'I'm fascinated by the creative process / materials'
— 'To support craft people / makers'
— 'I like to support new talent'.

8.2 More likely to look online for information about buying craft

Potential buyers are more likely than buyers to consider using online sources of information about craft to buy than buyers:

— 41% would look on websites that sell or show craft (versus 27% of buyers)
— 37% would do a general web search if they were thinking about buying a craft object (versus 26% of buyers)
— 31% would search online marketplaces (versus 20% of buyers).

Potential buyers are also more likely to consult reviews and articles than buyers, and are less likely than buyers to look for information by visiting Open Studios.

8.3 Need more endorsement when thinking about a purchase

Potential buyers were asked to select what level of endorsement they would need before deciding to buy a piece of craft. We used the three categories defined in *Making it to Market*: and results are as follows:

- 45% = Risk taker: I would be prepared to take a risk without necessarily knowing the maker, if their work had been recommended
- 42% = Cautious gambler: I would take a limited risk without necessarily knowing the maker, if their work had been recommended
- 14% = Safety first: I would avoid taking risks by only buying work by well-known names which have been recommended.

Potential buyers have a more risk-averse profile than buyers, with lower proportions of Risk Takers (compared to 63% of buyers), and higher proportions of Cautious Gamblers (compared to 31% of buyers) and Safety Firsts (compared to 4% of buyers). This finding is consistent with potential buyers' responses to attitudinal statements explored at 5.3 above.

8.4 Most would spend no more than £100 on a craft item

On average, potential buyers state that they would be willing to spend up to £513 on their first craft purchase. However, the table below shows that the majority (70%) would limit their spending to £100.

Base	89
If you were to buy your first piece of craft, what is the most you would spend?	% of potential buyers
£0.01 to £10	6%
£10.01 to £25	7%
£25.01 to £50	35%
£50.01 to £100	20%
£100.01 to £500	22%
£500.01 to £1,000	3%
£1,000.01 to £5,000	2%
£5,000.01 to £10,000	3%

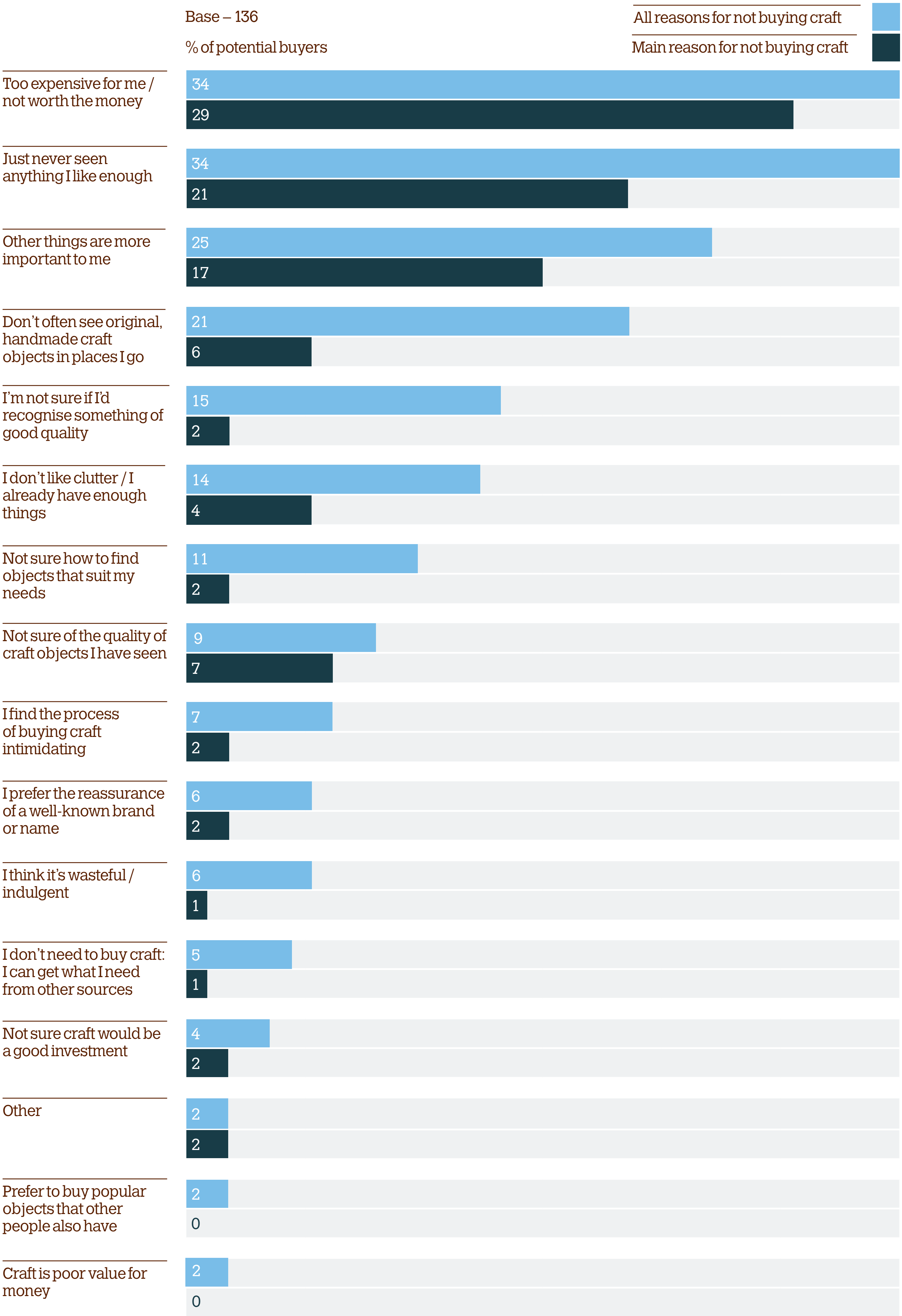
8.5 Reasons not to buy

As the chart below shows, when given a list of possible reasons why they had not yet bought craft, the perception of expense is the most commonly-named main reason for not buying craft amongst potential buyers (29%).

The second most commonly-named main reason is 'just never seen anything I like enough' (21%), with a further 6% saying 'don't often see craft in places I go'. Prioritising other areas of spending is also identified as a barrier to buying for potential buyers.

There also appears to be an issue of priorities: the third most commonly-named main reason is 'other things are more important to me' (17%), with a further 4% saying 'I already have enough things', 1% that 'it's wasteful / indulgent' and 1% that 'I can get what I need from other sources'. This amounts to 23% of respondents with a main reason not to buy connected to craft being a non-essential purchase; a find which correlates trend findings discussed in section 9 below.

Figure 5: Which of these describe the reasons you haven't yet brought craft



9.0 Consumer trends relevant to the craft market

This section considers:

— Macro consumer trends relevant to the craft sector.
— Interpretation of the data from this study in relation to identified consumer trends.

To inform this research project, we have looked at a range of consumer trends sources – details can be found in the bibliography.

As context for the sections below, we define 'consumer trends' as follows:

— Patterns of behaviour, or a way of labelling a pattern and trying to identify the causes or factors that are driving it.
— The link between demographic, economic, political and technological change and individuals' choices.

We note that for every identified pattern, there will be behaviours or whole anti-trends that defy it and that both trends and anti-trends can last for decades. The key consumer trends identified ten years ago as the basis for predictions for 2010 in *The Arts Landscape in 2010*[31] have evolved rather than disappeared, and the underlying needs that consumers are trying to fulfil remain fairly constant.

31 The Henley Centre (2000), *The Arts Landscape in 2010*, Arts Council England.

9.1 Not necessarily spending more or less: responding to economic change – but spending differently

As shown in the table below, 76% of people in the craft market have already modified what and how they buy to some extent in response to the economic downturn, with 1 in 10 saying 'it has changed what and how I buy forever.'

Market for craft Base – 416	
Has the economic downturn affected your spending decisions?	
No	21%
Yes – I have modified what and how I buy somewhat	35%
Yes – I have modified what and how I buy significantly	31%
Yes – it has changed what and how I buy forever	10%

9.2 New consumer cultures

The influence of economic, social and political change on consumer attitudes and behaviour is a subject of current debate amongst consumer trends commentators. Many argue for recognition of profound shifts in the way that people value objects and engage with the marketplace, based on social and economic factors compounded by demographic and technological change. Whilst the longevity and actual impact of these shifts is indeterminable, their current influence is strong.

"The recession was a massive economic and social event. And it did not just change the weather for a while. It altered the climate." (nVision, 2010)

A Darwinian Gale[32] argues that the recession and wider climate of uncertainty has introduced a new 'Era of Consequences' where consumers will increasingly find value in responsibility rather than in credit-fuelled trading up. The report identifies five main behavioural cornerstones for the marketplace ahead, summarised below:

1. **Responsibility:** consumers will be more mindful and realistic about decisions, taking greater personal responsibility for the consequences of their spending on themselves, others and the wider environment. The equations used by consumers to weigh up value will therefore be more complex, require more information and greater brand transparency.
2. **Vigilance:** consumers will be more vigilant about their exposure to risk, leading to increased determination to be smart about shopping and buying. There will be an ongoing weakening of brand loyalty and trust in large institutions: brand values will be examined far more carefully than in the past.
3. **Resourcefulness:** consumers will take a more self-sufficient approach as it can no longer be assumed that macro systems can be relied upon. The benefits of thrifty living experienced during the recession will become seen as desirable. Skills – some acquired during the recession – will be seen as increasingly desirable, with consumers wanting to be inventive, ingenious, handy. Craft and manual skills will be highly valued, both for saving money and the personal rewards they provide. Self-sufficiency will be an increasing lifestyle focus, and entrepreneurialism will grow.
4. **Prioritisation:** consumers will no longer expect to have it all – putting priority on what's most important will become the focus. This will mean not just looking for the best value in a particular category, but also prioritising between categories. Long-lasting fulfilment will be increasingly valued over immediate gratification and meaningful, and lasting experiences over perfect moments – 'real' happiness will be the focus.
5. **Networking:** consumers will increasingly take responsibility for risk mitigation, joining up with others to provide back up, support and resources. People will turn to others like themselves and join up with niche sources of expertise, as their primary sources of information.

32 The Futures Company (2010), *A Darwinian Gale: The Recovery Consumer Marketplace in the Era of Consequences.*

9.3 Key consumer trends and how they relate to the craft market

As explained in section 2.2, our desk research, workshop and craft buyer survey allowed us to identify consumer trends with particular relevance to the craft market, and to gauge reactions to these identified trends amongst buyers, lapsed buyers and potential buyers.

This process elicited five key trends currently shaping consumer behaviour in the craft marketplace, outlined below. Strong and consistent endorsement of these trends by craft buyers (when compared with lapsed and potential buyers) gives us confidence in their direct and current relevance.

Increasingly niche, personalised identities

Rather than looking to align themselves with established brands through their buying decisions, consumers are looking for objects that reflect their unique personalities and cater for their increasingly niche, complex and diverse interests. Trendwatching describes this shift from brand endorsement to the development of a sophisticated personal identity described as 'Brand Me' (Trendwatching 2010).

With craft seen as the most 'personal' category compared to design, art and luxury goods[33], there is a clear indication that craft could be benefiting from this trend. Social media tools play a significant part in the shaping and communication of individual identity, and may therefore become a more influential driver in craft consumption and retailing.

33 See section 6 for more information

Authenticity

Authenticity is a long-term identified consumer trend, but one that is becoming increasingly important in the current climate and is particularly relevant to the craft market. With craft shown to be the most 'genuine' of related categories[34], associated strongly with 'workmanship' and the 'handmade', craft is well placed to benefit from consumers' increasing identification with the authentic: 22% of buyers agree that they are motivated to buy craft because 'unique objects reflect my identity' (See section 7.1).

34 For more information about the research methods used, see section 2.2

It is now no longer enough for something to merely *appear* authentic. With consumers' increasing vigilance about the consequences of their decisions, individuals are increasingly interrogating the authenticity of their goods. The results from our study below show that for the craft market, provenance is a significant consumer influence:

— 68% agree, 30% agree strongly, with the statement that 'if an object looks handmade, it's important to me that it really is made by hand', compared to 10% strongly agreeing that 'how an object looks is more important than how it was made'.
— 51% agree with the statement that 'it's important to know where the objects I buy come from'.
— 51% agree that 'I like to know who made an object and how [it is made].'

Ethical added value

The behaviours described in *A Darwinian Gale* are indicative of a trend endorsed by many consumer commentators, towards a renewed interest in the influence of ethical considerations on consumer choice[35]. Consumers may not be re-orienting their buying around ethical issues, but they are seeing added value in desirable products and brands which also minimise environmental impact or promote fair trade, for example. As Henley Centre *HeadlightVision* explains:[36]

'Brands need to marry sound ethical values with products that are inherently desirable, if they are to last.'

Craft buyers' interest in the provenance of craft objects (see above) and – to a lesser degree – in 'reacting to mass production' (see section 7.1), together with their perception of craft as 'genuine' and 'handmade' suggest that the added ethical value of craft objects is an area of specific marketing opportunity for the craft sector.

35 The Futures Company (2010), *A Darwinian Gale: The Recovery Consumer Marketplace in the Era of Consequences.*

36 The Henley Centre HeadlightVision (12 May 2010), 'The limits to ethical business', email update.

Appreciation of craft skills – through learning

The skill behind the craft object is the second most significant purchasing driver for people in the market for craft (see section 7.1): 55% of people agreed that they were motivated to purchase craft by the statement, 'I admire the human skill involved / want to keep craft skills alive.'

The high proportion of craft buyers participating in activities themselves (see section 5.2) suggests that for many buyers, appreciation of the skill behind the craft object is developed by making craft themselves.

This finding suggests opportunities for craft retailing in terms of eliciting the skill behind the craft object at point of sale. It also helps to explain the success of makers developing integrated business offers which offer leisure courses, craft kits and materials to buyers, alongside opportunities to purchase craft objects[37].

37 See Schwarz M. and Yair, K. (2010), *Making Value: Craft & the Economic and Social Contribution of Makers*, Crafts Council.

In this sense, the craft market can be considered part of the experience economy, in which consumers prioritise spending on experiences such as holidays, days out and courses, and on products / brands which either remind the buyer of this experience or offer distinctive buying experiences in themselves. Craft consumers are already part of this trend: 27% state that they would 'rather have an experience than an object' (See section 9.5)

New ways of signalling connoisseurship

Perceptions of luxury, status and connoisseurship have shifted and diversified in recent years, as ethical considerations have exerted increased influence on consumer spending and conspicuous consumption has become associated with an unsustainable economy and individual lifestyle. Our survey shows that whilst 68% of craft buyers said they were less likely to buy luxury goods now compared to five years ago, only 43% were less likely to buy craft.

This shift creates new opportunities for craft retailing. First, traditional consumers of luxury goods – high worth individuals whose financial status may be less affected by economic downturn than others – retain their need to signal connoisseurship through purchasing, and are perhaps looking for opportunities to do so in new ways. In this context, attributes associated with craft become key marketing features: craft is almost synonymous with the term 'workmanship' (selected as a craft attribute by 79% of our buyer survey respondents) and therefore brings quality and ethics together in an affordable product (only 16% of respondents considered craft to be 'expensive').

Second, the richness of the stories behind craft objects assume new importance. 45% of craft buyers agree that 'I like my possessions to be talking points, to be able to tell others the stories behind the objects I have.' In parallel, Trendwatching[38] has identified a trend it calls 'Status Stories', which describes consumers' increasing desire for objects which act as talking points: it is the stories behind objects which are acting as signifiers of connoisseurship and status, rather than the object's brand.

38 Trendwatching.com 2010

9.4 Attitudes to spending amongst the craft market

Spend on non-essential items has not fallen overall

Respondents were asked how the amount they would spend on non-essential items has changed since the economic downturn.

The results show that over half (61%) of people in the craft market say they feel less inclined to spend on discretionary items since the recession.

However, the rest of the market appears to have already restored – or even increased – its discretionary spending, with 26% of respondents saying the amount they would spend on non-essential items has stayed the same and 7% stating it has increased since the economic downturn.

This trend appears to be particularly pronounced for active craft buyers: 1 in 10 active buyers (people who have bought craft in the past two years) have increased the amount they are willing to spend on non-essential items. This is broadly consistent with findings from the evaluation of *Collect: the International Art Fair for Contemporary Objects* in 2009[39], which showed that only 9% of those who had bought an object at the event (and who are therefore in the top tier of current active buyers) felt that economic downturn had affected their spending habits.

39 Morris Hargreaves McIntyre (2009), *Collect 2009: Evaluation of visitor and exhibitor experiences and the potential market*, Crafts Council, (unpublished).

Craft spending appears more resilient than other categories

The table below indicates that interest in buying craft has withstood economic downturn slightly better than related categories, and particulary when compared to luxury brands.

Market for craft

Base – 416

Compared to five years ago, are you …	Craft	Art	Design	Luxury brands
More likely to buy	7%	5%	4%	3%
Equally likely to buy	38%	30%	33%	24%
Less likely to buy	43%	54%	52%	65%

Whilst active craft buyers are increasing their non-essential purchasing, lapsed and potential buyers are more likely to be cutting back spending. Lapsed buyers (those who made their most recent craft purchase over two years ago) are the group most likely to strongly agree with the statement that ‘I try to only consume what I need’.

In addition section 8 indicates that many potential buyers are choosing not to buy craft because they are prioritising spending elsewhere or deem craft to be a non-essential purchase.

This indicates that whilst spending on craft may remain stable overall, the wider trend of trying to live within one’s means and reducing needless consumption could constrict further market growth and the entry of new buyers into the marketplace.

9.5 Increasing priorities for consumers in the market for craft

Respondents to the detailed survey of craft buyers and potential / lapsed buyers were asked to select which attitudinal statements were increasing in importance for them. They could pick as many as they liked. Full results are shown on the chart below.

Reducing wasteful consumption

The top increasing priority for the market is ‘to try to only consume what I need’: 46% picked this option, reflecting increasing interest in limiting overall consumption.

Looking for more personal, unique and ethical routes for consuming objects

The results below substantiate the suggestion made in section 6.3, that people in the market for craft are increasingly rejecting big brand names: only 6% of respondents agree that ‘buying from well-known / luxury brands is increasingly important for my image’. Instead, these consumers are increasingly interested in meeting needs that our findings[40] show can be fulfilled by craft objects.

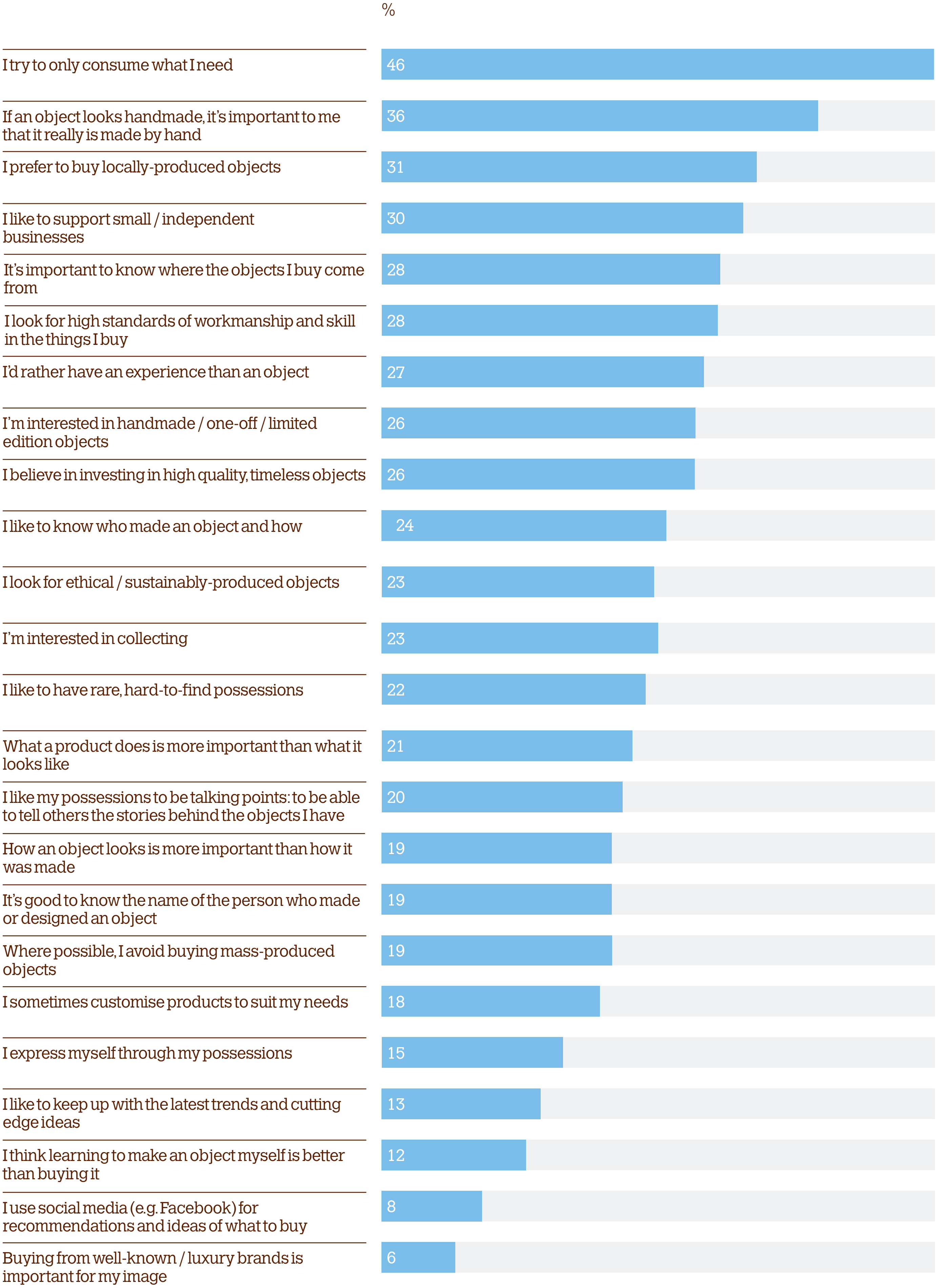
40 See section 6

Increasing need for more meaningful consumption supports craft purchasing

The results also suggest that perceptions of ‘need’ are no longer limited to essential commodities: the need to collect, to acquire rare possessions and to display objects as talking points in the home are also all growing concerns for over 1 in 5 respondents.

Figure 6: Of these, which are increasing in importance for you?

Base – 416



Different priorities for different sections of the market

The following appear to be broad trends that are growing equally in importance for all sections of the craft market (i.e. active buyers, lapsed buyers and potential buyers are equally likely to select):

- 'I'd rather have an experience than an object'
- 'Where possible I avoid buying mass produced objects'
- 'I sometimes customise products to suit my needs'
- 'I think learning to make an object myself is better than buying it'
- 'Buying from well-known / luxury brands is important for my image' was the lowest-ranking answer for all groups.

Buyers are more likely than potential buyers to identify many of the craft-related attitudes as growing concerns. For example:

'I like to have rare, hard to find possessions'
'I believe in high quality, timeless objects'
'I like my possessions to be talking points'

People who have not bought craft in the past two years (lapsed buyers and potential buyers) are more likely than active buyers (have bought craft in the past two years) to name 'I try to only consume what I need' as a growing concern, again indicating that this mindset could be a possible constricting factor in growing the market.

10.0 Implications for the future of the craft market

This section draws conclusions about how we might expect the contemporary craft market to evolve during the period 2010 – 2015, in response to broader consumer trends and based on the primary research carried out for this study.

Given the findings from this study, we have identified the following areas that may increase in prominence in the market over the next five years.

The Crafts Council has also produced a response to the research findings, available at www.craftscouncil.org.uk, which expands on implications for craft retailers, galleries, makers and organisations working to develop the market for contemporary craft.

10.1 The market could grow further

It is difficult for us to predict whether the current willingness to consider craft purchases will be sustained in the long term. However, given the strong correlation between wider consumer trends and craft values, it seems reasonable to suggest that there is genuine potential for the craft market to attract even greater numbers of buyers in the next five years.

10.2 Scope to encourage more sales from buyers

The findings show that buyers – and particularly those who have purchased in the past two years (active buyers) – are increasingly prioritising areas of interest that could be met by buying more craft.

This suggests that there is significant scope to engage buyers more fully in the craft sector, increasing their appreciation of the sector and encouraging them to buy more craft.

10.3 Scope to encourage potential buyers to buy

The market size data shows a large potential market for buying craft (9.6 million people; 23% of the adult population). As described elsewhere in this report, potential buyers (people who have never bought, but would consider buying in future) are:

1. Young – younger than both buyers and those not interested in buying.
2. Culturally active, but not necessarily actively seeking out new cultural experiences.
3. Not actively participating in craft activities to anything like the extent of buyers.
4. Already appreciating craft objects for their uniqueness, but less aware of other aspects of craft buying including the beauty, skill and broader value of craft traditions.
5. More concerned with the opinions of others, and need higher levels of endorsement to buy craft.
6. More likely than buyers to use online resources when thinking about buying craft.
7. More concerned about consuming only what they need than buyers.

These characteristics, together with the wider trends described above, suggest that there may be opportunities to engage potential buyers through:

— Recommendation and introduction to craft buying through 'people like me', either in person or online.
— Clear online resources that offer an introduction.
— Encouraging them to take part in craft activities, which help to educate them on the benefits of craft objects.
— Providing opportunities to see craft objects in their everyday lives, including other cultural settings, and to attend craft fairs and exhibitions (which are shown as a key route to first purchase).
— Helping potential buyers to discover a broader range of benefits to buying craft, including the unique gifting benefits of craft that are appreciated by the buyers.

However, results suggest that this will be in the context of the wider trend to restrict wasteful consumption: the craft sector will have to work hard to demonstrate to these potential buyers that craft is an effective way to fulfil their needs.

10.4 Appeal of objects connected to place

As part of the wider authenticity trend, craft items with a particularly local provenance would seem set to become increasingly sought after. At a time when anything is available anywhere through globalised distribution systems, exclusive-to-location objects with a genuine local connection are increasingly valued for their rarity.

10.5 Increasing interest in the stories and personal connections behind objects

There is clearly a growing concern that objects should be what they appear – if the object looks handmade, it matters that it really is. Consumers are also increasingly interested in knowing more about the origin of an object: where it comes from, who made it and how it was made.

Whilst the feeling of having a relationship with a maker – of being privy to their creativity – has long been acknowledged as a major motivation for buying, this interest in the personal provenance of craft appears to be an ascendant trend.

10.6 Commissioning craft – especially lower-value objects

Given the overall consumer trends for customisation, niche interests and objects that reflect an individual's uniqueness, there seems to be an opportunity to introduce relatively new buyers – or even those who have never bought craft before – to commissioning through new models of customisation.

10.7 Learning about craft by doing craft

With practical skills giving consumers a sense of control, achievement and resourcefulness, the trend for participating in craft looks set to grow. This can already be seen in the market, with the popularity of craft activities at festivals, workshops and make-your-own kits developed by makers[41].

41 Explored in Schwarz M. and Yair, K. (2010), *Making Value: Craft & the Economic and Social Contribution of Makers*, Crafts Council.

10.8 Sourcing craft through recommendation and networks

Previous studies have shown that potential buyers struggle to find information about how and where to choose or buy craft. With potential buyers more likely than buyers to look online for information about buying craft and the increased reliance on 'people like me' and experts as trusted sources, there seems to be opportunity to broaden the market for craft through networks, potentially online.

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