



**Supporting Makers to
Export: Survey Findings
2017-2019**

(Exports '19)

Crafts Council

October 2019

Leah Kahn

Julia Bennett

Supporting Makers to Export: Survey Findings 2017-19

Contents	Page
Introduction	3
Approach to the survey	4
Key findings	5
Description of respondents	6
Description of makers' export activity	10
Barriers and opportunities	15
Concluding comments	16

Tables

1	Makers' primary discipline	6
2	Makers' region of work	7
3	Comparison of makers' business age	8
4	Comparison of yearly business turnover	9
5	Comparison of makers' first sales abroad by business age	10
6	Comparison of makers' trade activity	11
7	Comparison of makers' overseas selling channels	12
8	Comparison of e-commerce platforms used for exports	13
9	Comparison of export markets by continent	14
10	Comparison of barriers makers perceive to exporting	15

Supporting Makers to Export: Survey Findings 2017-19

Introduction

This is the third year in which the Crafts Council has undertaken a national survey on how UK makers export internationally. This year the survey was conducted during a period of intense negotiations in preparation for Brexit and it is likely that this has impacted on the confidence of makers. The findings of this small-scale survey show a decline in the percentage of makers' turnover from export sales and a reduction in export activities, to which the uncertain political climate may have contributed.

The Crafts Council and eight national partners* have recently commissioned a study of the market for craft. The analysis of both demand and supply sides of the market will be published in summer 2020 and is intended to address some of the need for support in targeting markets identified by respondents to this survey.

*[Arts Council of Wales](#), [Contemporary Visual Arts Network](#), [Craft Northern Ireland](#), [Craft Scotland](#), [Crafts Council](#), [Creative Scotland](#), [Creative United](#), [The Goldsmiths' Company](#), [Great Northern Events/Great Northern Contemporary Craft Fair](#).

This study is one of several ways in which the Crafts Council supports makers to export. Our activities also include:

- Advice sessions, biennial business development conference and workshop programme from our [Talent Development Team](#)
- [Producing an International Exports Toolkit](#)
- [Collect: The International Art Fair for Contemporary Craft](#) that takes place annually in London
- Events during [London Craft Week](#) and one-off events such as an [exclusive panel discussion](#) with the All Parliamentary Group on Design and Innovation on how policy maker can support craft exports hosted by Jack Brereton, Member of Parliament for Stoke-on-Trent.
- One-off programmes such as the 2016-2018 [A Future Made](#) international showcasing programme at major art fairs in key markets; and a professional development programme for craft businesses.
- Working with the Department for Digital, Culture, Media & Sport (DCMS) to ensure that different types of craft export activity are more fully reflected in government codes that track international exports.

[DCMS data](#)¹ indicate that the total value of craft exports grew by 31% in the years 2010 – 2017 from £3,701m in 2010 to £4,848m in 2017 and by 5.3% between 2016 and 2017. At 1.4% of total value of UK exports of creative industries goods in 2017, craft makes the highest level of contribution of any creative industry category to

¹ See DCMS Sectors Economic Estimates 2017: Trade, Tables 33 and 39: Exports of goods by sub-sector and by country <https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2017-trade>

overall UK exports. (Note that the value of craft exports is significantly influenced by the export of gemstones and precious metals through the jewellery trade.) Key European country markets included France, Italy, and Ireland. DCMS data also indicate that key export markets globally include the Gulf², Switzerland and USA.

Approach to the survey

In undertaking this survey annually, we seek to build our understanding of the type and scale of goods and services exports that UK-based makers and designers pursue overseas. We use the data to compile and capture the broadest possible understanding of overseas activities, from product sales and representation at trade events or by galleries, to delivering workshops or training. We analyse the trends to inform our work and advocate for an easier export environment for craft makers.

For *Supporting Makers to Export: Survey Findings 2017-2019* we surveyed makers during June 2019. We invited makers from the [Crafts Council Directory](#), alumni from our [Hothouse](#) programme and through our social media channels and newsletters. This report, *Supporting Makers to Export: Survey Findings 2017-2019*, is referred to throughout as 'Exports '19'. It builds on and compares findings to *Supporting Makers to Export: survey findings 2018* and *2017* - referred to as Exports '18 and Exports '17.

Using our networks in this way allows us to survey UK makers at all stages of their careers. However, the number of respondents (49) means that this cannot be considered a scientific study; rather it can be used to indicate possible trends in makers exporting internationally.

Our thanks to the makers who responded to the survey – we're very grateful for your time.

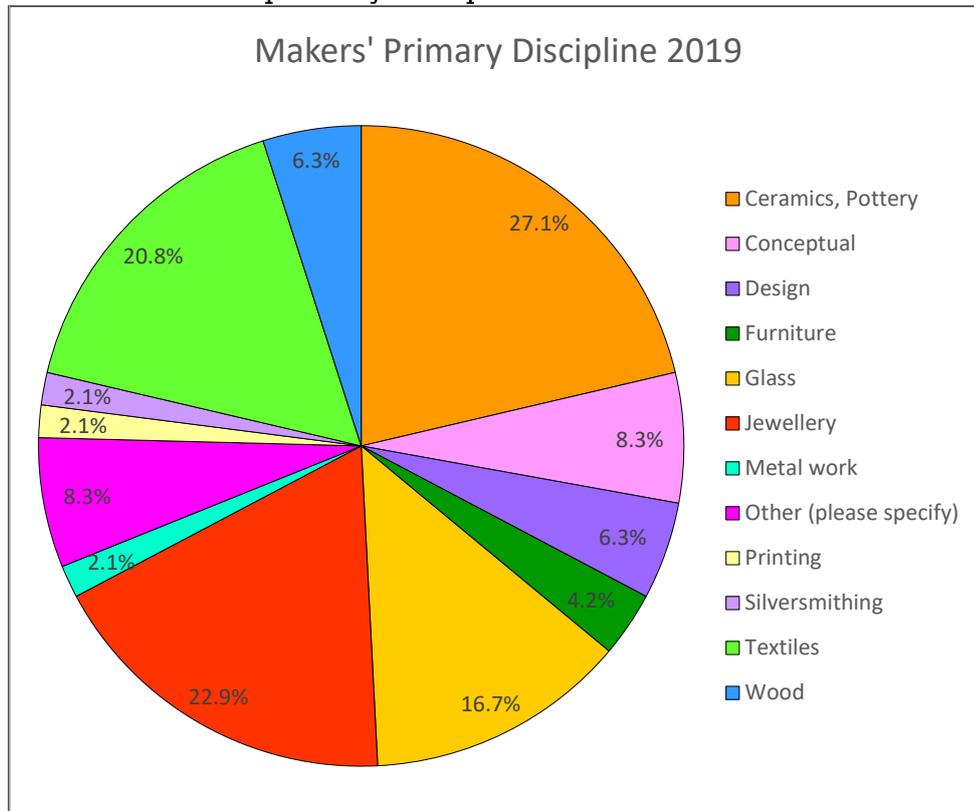
² Includes Bahrain, Iraq, Kuwait, Oman, Qatar, Saudi Arabia and UAE.

Key Findings of Exports '19

- Exports '19 shows a decrease in makers' participating in export activities internationally across all areas of activity.
- The average percentage of respondents' international sales is 20.2% of annual turnover; this is a decrease compared to Exports '18 (32.3%) and Exports '17 (26.1%).
- The most common export activity is participation in an exhibition or trade event abroad led by a UK-based organisation (46.2%; this is significantly lower than in previous years).
- The largest markets by continent are Europe (70.6% of respondents) and North America (64.7%). None of this year's respondents were exporting to Africa.
- Once again, most makers surveyed are sole traders (81.25%); but they make up only 30% of those that are exporting abroad, with 70% not exporting. By contrast, all exporting businesses employ between 1 and 9 people, suggesting that those businesses may have more resources to plan their approach to exporting. Those exporting tend to have been in business for longer (63.6% of established makers).
- Only 6.7% of makers surveyed in Exports '19 had a written exports plan. 'Established makers' form the largest group of maker businesses (59.1%) without a written export plan.
- This year the biggest barrier to exporting was 'general cost' (a new survey option, identified by 47.2% of respondents), followed by logistics and shipping (44.4%), network and contacts (36.1%) and lack of knowledge/ experience (36.1%).
- The number of makers surveyed who are turning to organisations for support remained steady at 55.8 % in Exports '19.

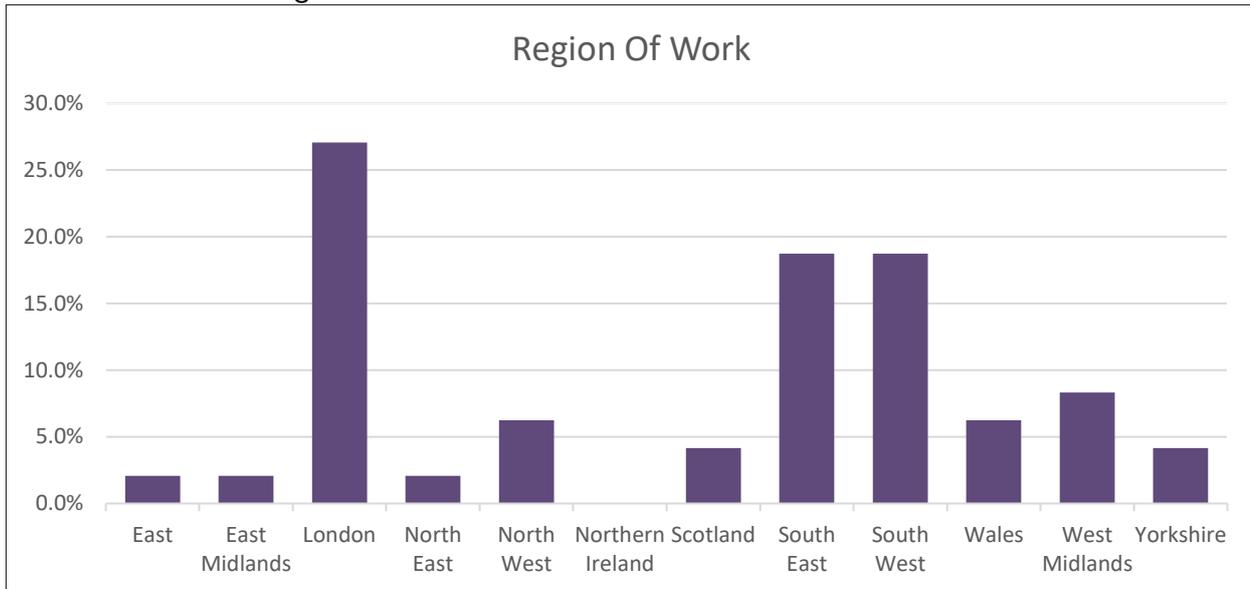
Description of respondents

Table 1: Makers' primary discipline



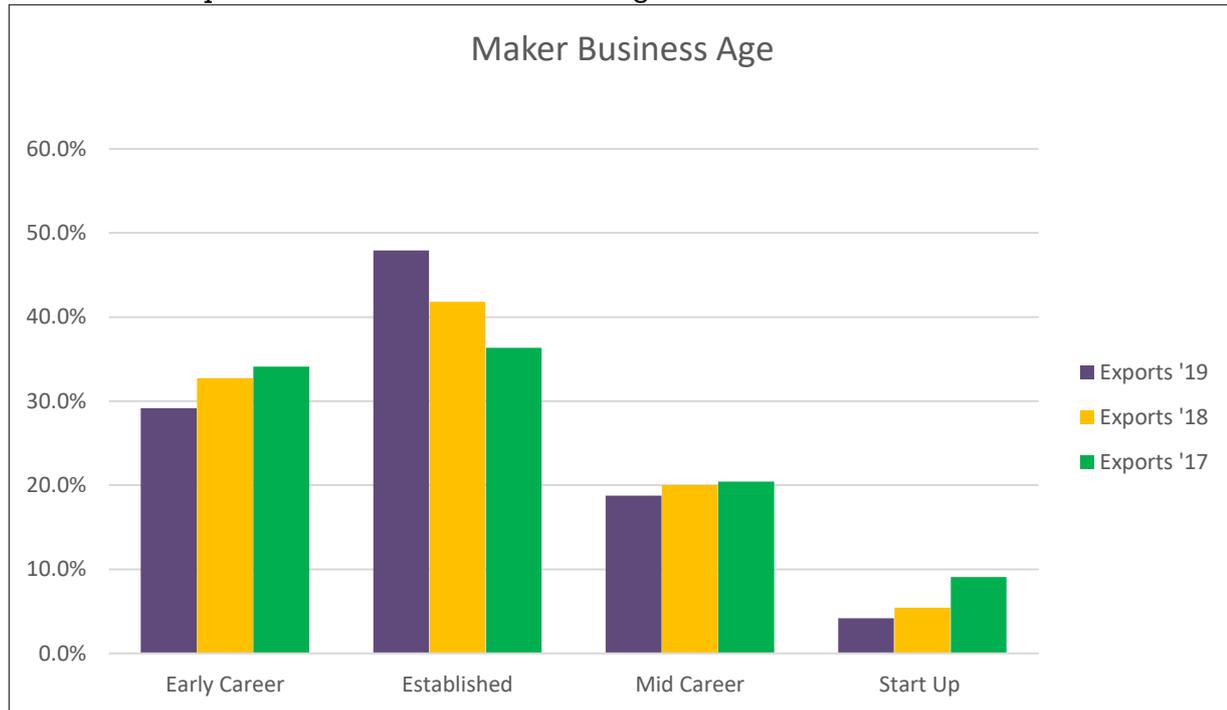
- In each year of the survey the largest groups of makers work in ceramics, jewellery and textiles. There were no respondents in Exports '19 who identified their primary discipline as 'automata', 'books, book binding', 'lettering', 'millinery', 'mosaic', 'shoemaking', 'stone working' or 'toys and instruments'.

Table 2: Makers' region of work



- 27.1% of makers surveyed are London-based (compared to 34.6% in Exports 1). It remains the area with the largest number of respondents.
- There has been an increase in makers responding from South East (18.8%), South West (18.8%), Wales (6.3%) and West Midlands (8.3%).
- No survey respondents were based in Northern Ireland.

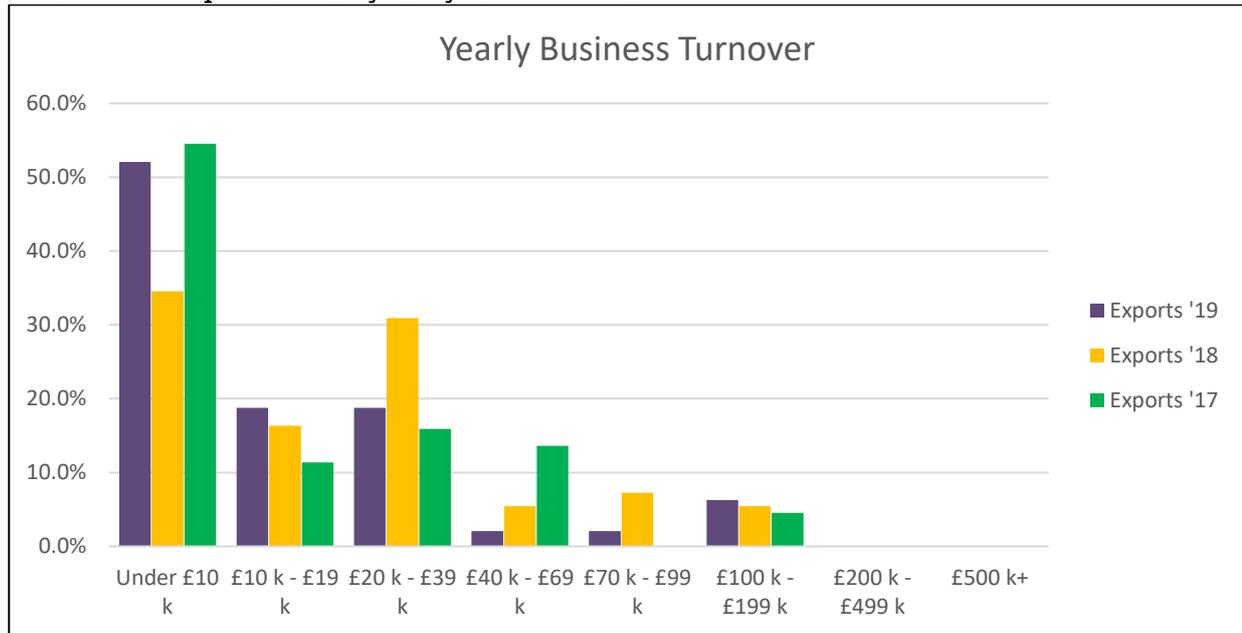
Table 3: Comparison of maker business age



- Makers from all career stages are represented in those surveyed.³
- Respondents who identify as established remain the largest group (47.9%)
- There was a decline in respondents who identify as early career, mid-career and start-ups in Exports '19.

³ Maker career stages defined as: Start Up (established less than 12 months), Early Career (established 12 months to four years), Mid-Career (established 5 years plus), and Established (e.g. established 10 years plus).

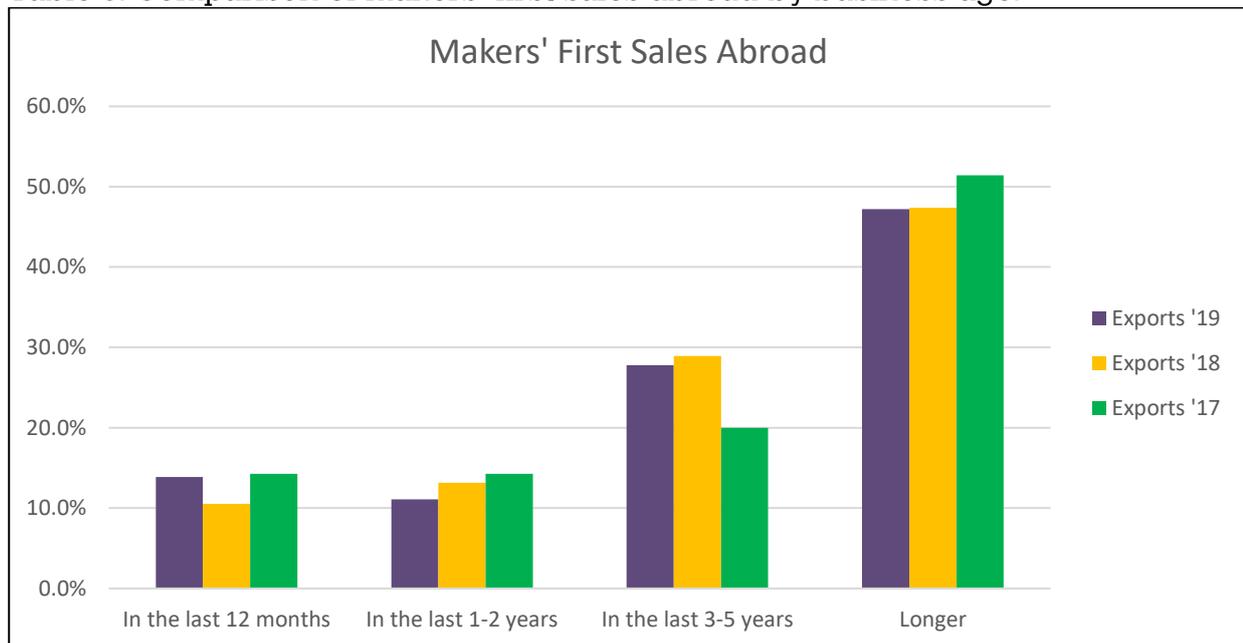
Table 4: Comparison of yearly business turnover



- There is an increase in the number of respondents who are earning under £10,000 (52.1%) compared to Exports '18.
- In each year of the survey respondents' turnover remains under £200k per year. The average percentage of respondents' international sales is 20.2% of annual turnover; this is a decrease on Exports '18 (32.2%) and Exports '17 (26.2%).

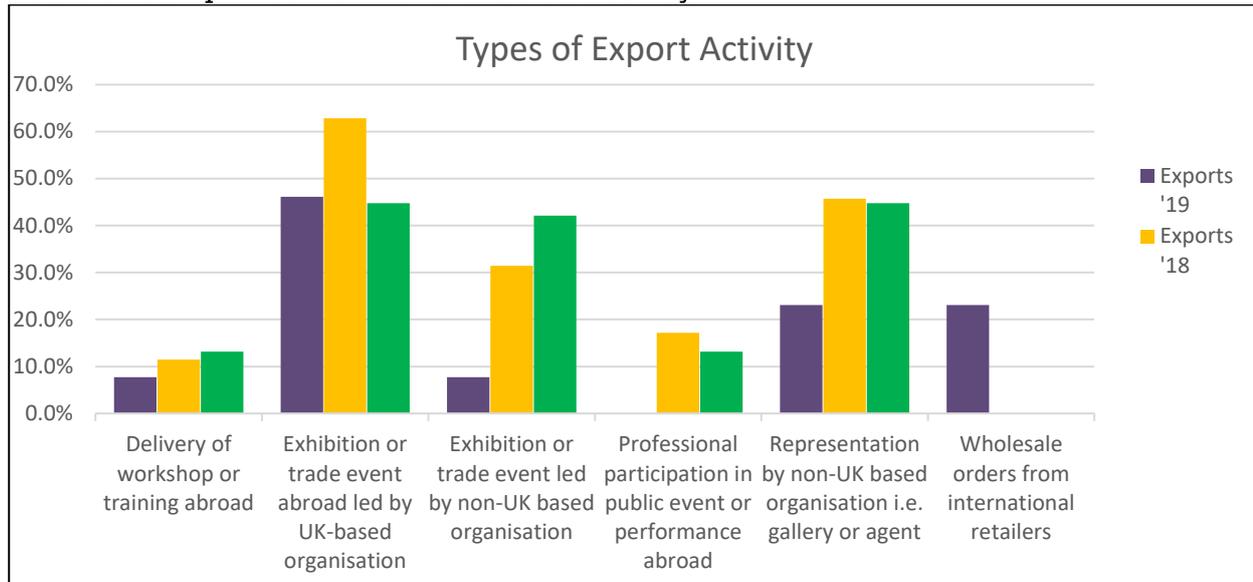
Description of makers' export activity

Table 5: Comparison of makers' first sales abroad by business age.



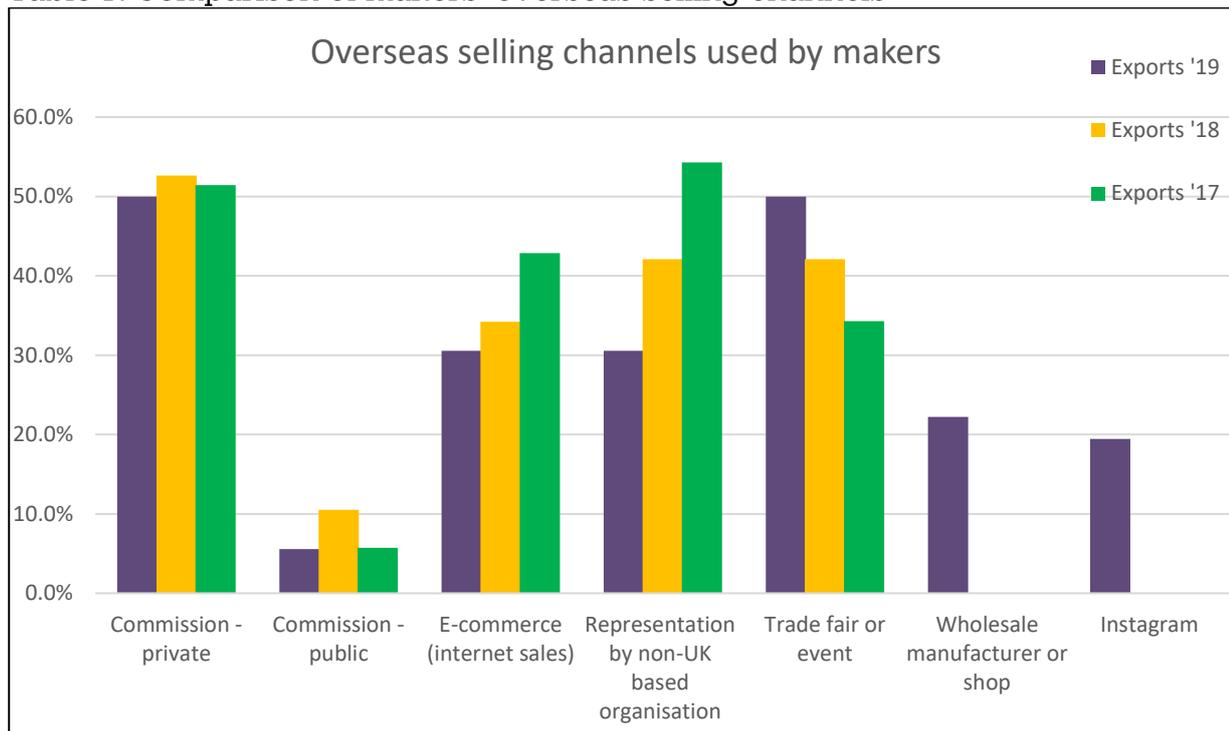
- There has been a small increase in the number of respondents selling abroad in the first 12 months of business (13.9% in Exports '19 compared with 10.5% in Exports '18).
- Once again, around half of the makers we surveyed have been exporting internationally for over 5 years.

Table 6: Comparison of makers' trade activity



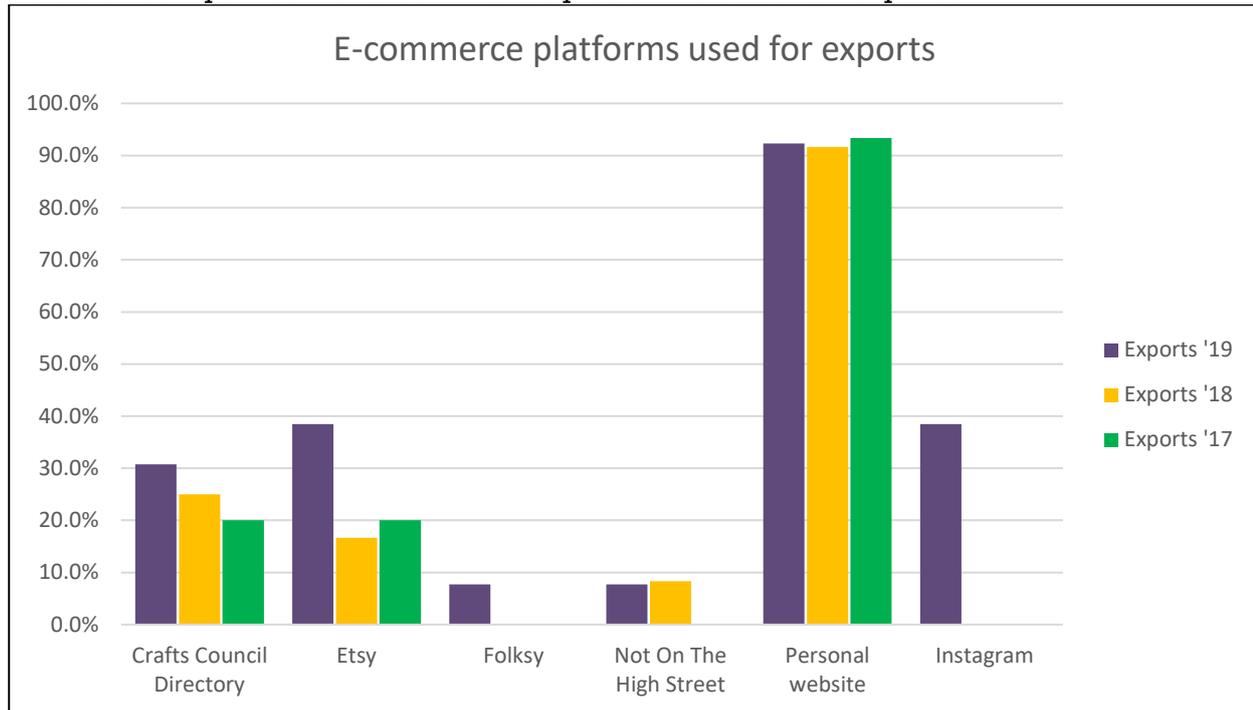
- We asked makers who export to indicate all the activities they are involved in. There has been a decrease in the number of makers exporting internationally in all activities. The most common activity is participation in an exhibition or trade event abroad led by a UK-based organisation.
- In Exports '19 we introduced a new category, 'wholesale orders from international retailers', as this was a commonly cited export activity in open text comments in Exports '18 and Exports '17. 23% of makers are doing this.
- Other types of exports activity cited in Exports '19 included using the online platform Etsy and direct sales from international clients.
- Participation in exhibitions or trade events led by non-UK-based organisations has declined by 81% (42.1% to 7.7% of respondents) and by non-UK-based galleries or agents by 48% (44.7% to 23.1%) in the last 3 years.
- No respondents to Exports '19 had exported through professional participation in a public event or performance abroad.

Table 7: Comparison of makers' overseas selling channels



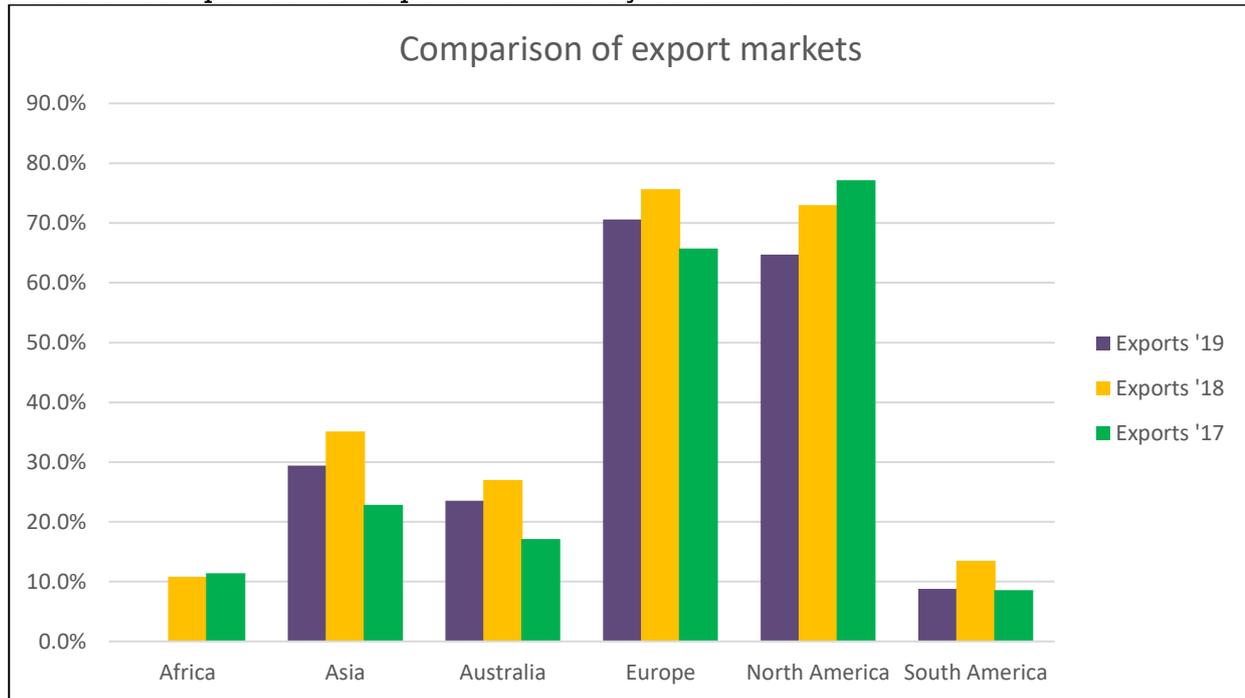
- Makers surveyed continue to sell through a number of different channels.
- In Exports '19 we included two new options: 'Instagram' and 'wholesale manufacturer or shop' as these were commonly cited export activities in open text "other" comments in earlier reports.
- The introduction of these two options in Exports '19 may explain why the selection of other options has decreased, although this was a multiple-choice question.
- The most commonly used channels were commission – private (50%), trade fair or event (50%), e-commerce (30.6%) and representation by a non-UK-based organisation (30.6%).

Table 8: Comparison of e-commerce platforms used for exports



- Personal websites are still the main e-commerce channel through which makers sell, at over 90%.
- In Exports '19 we introduced a new option ('Instagram'), as this was a commonly cited export activity in open text "other" comments in Exports '18 and Exports '17 reports.
- There was an increase of 35% in respondents using the Crafts Council Directory (to 10.8%) and an increase of 48% using Etsy (to 18.5%) over the last 3 years. 7.7% of respondents are now using Folksy for the first time.

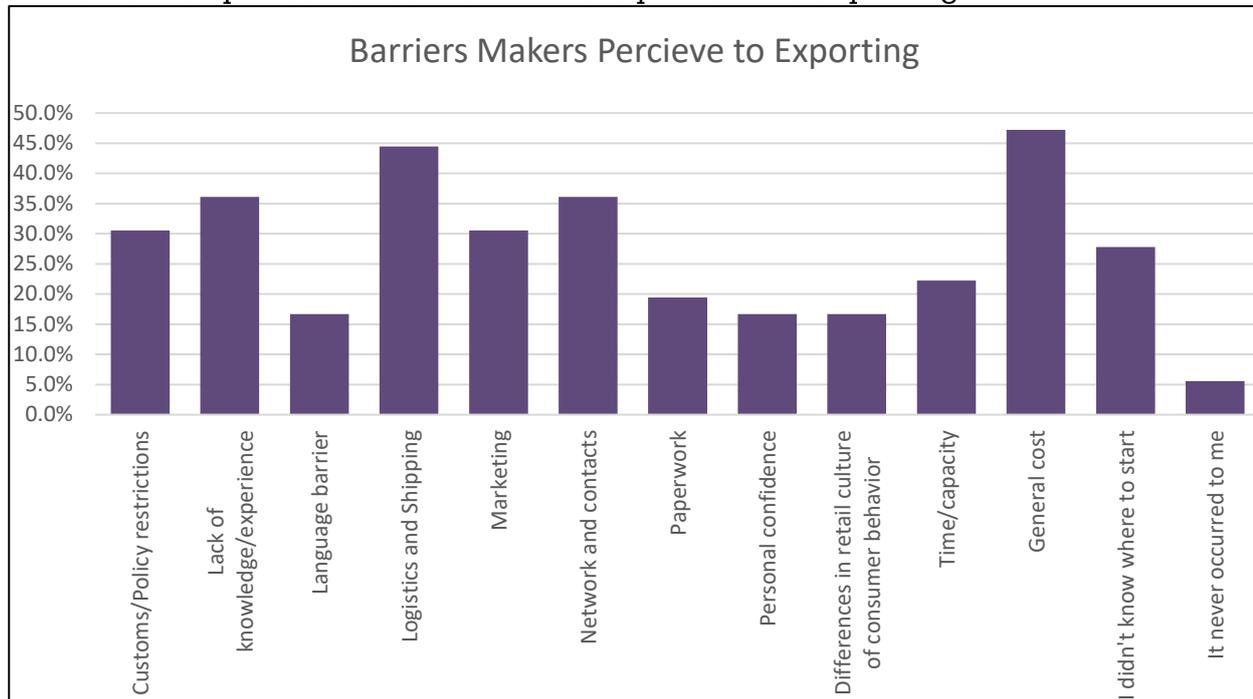
Table 9: Comparison of export markets by continent.



- Makers who responded are exporting to all continents except Africa.
- Europe (70.6%) and North America (64.7%) continue to be the most common destinations for UK makers.
- The percentage of businesses exporting has decreased to all continents in Exports '19 compared to Exports '18.

Barriers to Exporting

Table 10: Comparison of barriers makers perceive to exporting



- In Exports '19 we included four new options: 'general cost', 'time/capacity', 'I didn't know where to start' and 'It never occurred to me' as these were commonly cited barriers in open text "other" comments in the Exports '18 and Exports '17 reports.
- The most common perceived barriers to exporting in Exports '19 were general cost (47.2%), followed by logistics and shipping (44.4%), network and contacts (36.1%) and lack of knowledge/ experience (36.1%).
- Respondents' comments included the need for support in finding 'the right audience and place for my products' and 'how to approach companies and what red tape is there with different parts of the world'.
- Exports'19 shows that makers are still turning to organisations for support and advice about exporting internationally (for example Crafts Council, Department of International Trade). The number of respondents not turning to any organisation for support is 44.4% in Exports '19 (compared to 43.6% in Exports '18 and 57.1% in Exports '17).

Concluding comments

It is disappointing to see a decline in the percentage of makers' sales from exports since we first conducted this survey.

The Crafts Council continues to address this lack of confidence, including the finding that a large majority of craft businesses surveyed still do not have a written plan of their goals for exporting.

We hope that a more certain path towards Brexit may increase maker confidence. We will use the forthcoming findings from our study of the market for craft to inform both makers' ambitions and our talent development programmes, as we continue to provide support and analysis to boost international sales of craft.