European Crafts Alliance

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ohayō

CHARACTERISING THE EUROPEAN CRAFTS SECTOR. 2023

The European Market for Crafts

Gaining in-depth knowledge of the European buyer of crafts.
Profiling the emerging trends shaping consumer behaviour.
Unveiling the specific needs, challenges, characteristics, vulnerabilities and strengths of the European craft sector.

The European Market for Crafts is a study commissioned by the European Crafts Alliance and developed by Ohayō Brand Curation.
May 2023.

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Contents

I
CHALLENGES OF THE EUROPEAN MARKET OF CRAFTS AND OBJECTIVES OF THE STUDY 9

II
EXECUTIVE SUMMARY 13

01
CRAFTS' CONSUMER BEHAVIOUR IN 2023 AND CONSUMPTION TRENDS 23
01 Who is the buyer of crafts 26
02 What and how do they buy 36
03 Why do they buy 47
04 The craft consumer universes of the future 52

02
MARKET CHARACTERISATION AND SIZE IN 2022 78
01 A quick review of the craft sector in European countries 80
02 Average expenditure on crafts 86
03 The size of the European market for crafts 90
04 Competitive environment 92
05 Distribution channels for crafts and internationalisation 97
06 Key driving factors and challenges in the sector 102
07 Key players in European crafts 107
08 Sustainability of crafts 113

03
THE JOBS IN CRAFTS: WORKING CONDITIONS, SKILLS AND FUTURE PROSPECTS 115
01 Current working conditions of craftspeople 117
02 Perception about the future of the crafts jobs 120
03 Identification of the gaps in skills and education of craftspeople 123

04
PERCEPTION ON THE USE OF TECHNOLOGY 126

05
CONCLUSIONS AND RECOMMENDATIONS 130
01 Conclusions 131
02 Recommendations 135

APPENDICES 139
01 Crafts categories 140
02 Methodological details 143
03 Market size calculation 146
04 List of graphs and tables 150
05 Glossary 152

LEONARD KOREN, WABI-SABI: FOR ARTISTS, DESIGNERS, POETS & PHILOSOPHERS

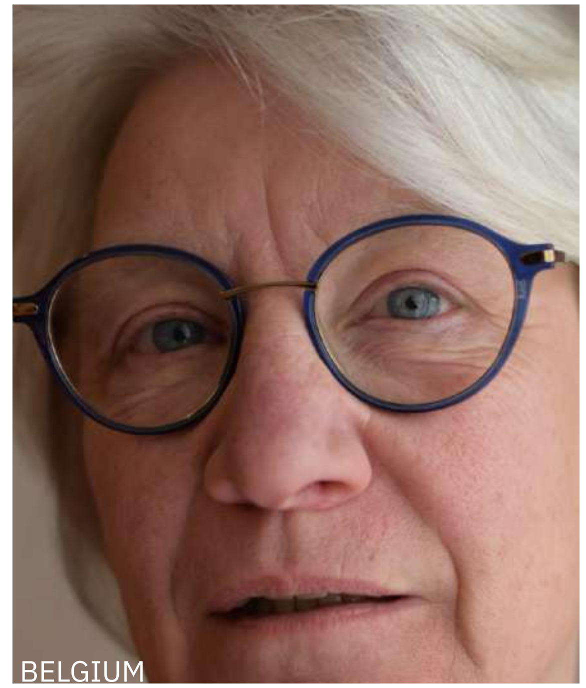
“Pare down to the essence, but don't remove the poetry”

Img.: Warion Taipei © via Unsplash

CRAFTSPEOPLE AND EXPERTS INTERVIEWED


BELGIUM
Dr. Anne-Sophie V. Radermecker
Université libre de Bruxelles, Dept. of History, Arts, Archaeology – Cultural Management A.P. in cultural economics


BELGIUM
Dimitar Stankov
Contemporary jewellery and art objects


BELGIUM
Hélène Martiat
President of BeCraft


DENMARK
Hilda Piazzolla
Ceramicist and project leader of Peach Corner


DENMARK
Iben Høj
Textile Designer and artist


DENMARK
Morten Stenbæk
Cabinet maker


FINLAND
Alma Jantunen
Glass blower and artist


FINLAND
Anna Rikkinen
Contemporary Craft Specialist and Project Manager at Ornamo Art and Design


FINLAND
Chao-Hsien Kuo
Master Goldsmith and contemporary jewellery maker


FINLAND
Katja Kotikoski
Ceramic artist

CRAFTSPEOPLE AND EXPERTS INTERVIEWED


FINLAND
Mari Isopahkala
Contemporary designer of Mari Isopahkala Design and Artistic director of Arkimuoto


FINLAND
Sarita Koivukoski. Okra
Craft shop and ceramic art

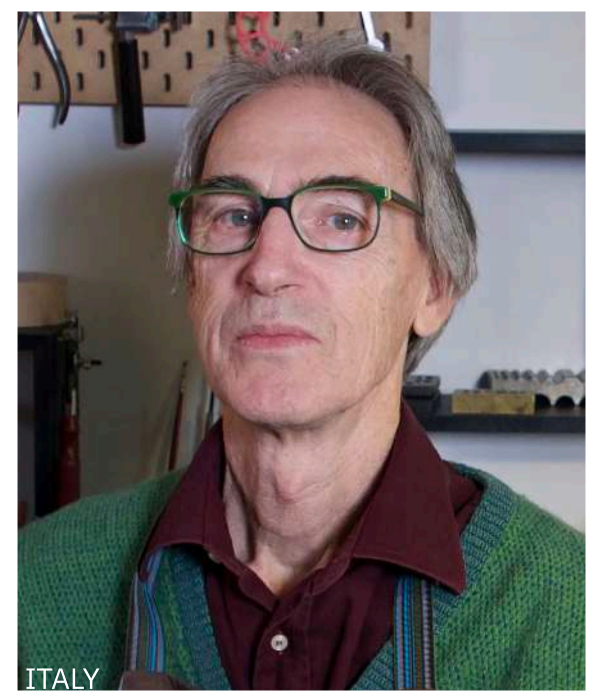

GERMANY
Lyn Riccardo
Ceramicist


GERMANY
Marianne Kassamba
Office manager of the German Crafts Council in Frankfurt


IRELAND
Anneliese Duffy Fallon. Linnen Shirt Company
Crafts textiles. Founder and manager


IRELAND
Emmet Kane
Woodturner/Sculptor


IRELAND
Mary Jo Hoyne
Head of Craft & Education at Design & Crafts Council Ireland


ITALY
Michael Hofmeyer. MHGOLD
Goldsmith, jewellery designer and maker of jewellery
'Australian currently living in Padova'

CRAFTSPEOPLE AND EXPERTS INTERVIEWED


NETHERLANDS
Daan Simons. Tsugi Woodworks
Woodwork|Joinery


NETHERLANDS
Marieke van Heesbeen
Product designer specialised in ceramics


NETHERLANDS
Marion Poortvliet
Contemporary designer of Mari Founder and director of Crafts Council Nederland


POLAND
Olga Milczyńska
Ceramist and president of Nów. New Craft Poland


POLAND
Piotr Jedras. KLOSY Knives
Knife maker


PORTUGAL
Milú & Jorge. Oficina da Formiga - Cerâmica
Ceramic workshop and store


PORTUGAL
Vasco Águas
Weaver/Textile Artist


SLOVAKIA
Jakub Liška. Modranska
Ceramist

CRAFTSPEOPLE AND EXPERTS INTERVIEWED


SLOVAKIA
Daniela Kytková. vPRIESTORe
Gallery and design concept store owner


SPAIN
Henar Iglesias
Feather artist


SPAIN
José Carlos Villarejo
Artist, Guadameci Art


SPAIN
Lala de Dios
Weaver, art historian
President of Oficio y arte, Organización de Artesanos de España (OAE)


SPAIN
Laura Miguel
Curator and consultant specialised on crafts, design and cultural and creative industries.


SPAIN
Silvia Martín
EOI Foundation-Fundesarte manager


SWEDEN
Maj Sandell
CEO Konsthantverkscentrum. The Swedish Crafts Centre


SWEDEN
Matilda Kästel
Glass artist and project manager, The Swedish Crafts Centre

I. Challenges of the European Market of crafts and objectives of the study

The challenges of the European Market of Crafts were already a reality before the COVID-19 crisis and the unfortunate war in Ukraine. In a world where our material connection with the past is in a constant process of erosion, and the skills of craftspeople along with their many trades are disappearing due to competition with cheap industrially manufactured alternative products, the preservation of crafts as a productive part of European heritage is a way of cultivating and thriving for the European cultural identity.

To strengthen the whole European craft sector and to raise awareness and appreciation of them as a key component of our culture, society, economy and well-being it is necessary to gain knowledge on its dynamics and singularities. The craft sector, like many others, has its own needs, strengths, weaknesses, challenges and opportunities.

As true believers in the importance of crafts in our society, the European Crafts Alliance (ECA) is committed to building greater capacity within the European craft sector; to unveiling the power of crafts for building strong communities; to contributing positively to the brand of Europe; and to accelerating the important transformative role of the European craft sector as a driver of sustainability and circular economy.

The endeavour of characterising and assessing the European market for crafts carries within it a series of challenges such as:

1. The importance of probing the quantitative and qualitative value of the European Craft market in order to inform and guide the European policies that support it.
2. The difficulty of how to characterise the craft sector in Europe while embracing all its diversity and complexity.
3. How to find a place for crafts in our new sociocultural and economic context where it can thrive.
4. To unveil new business models for the highly skilled and labour intensive activities linked to European heritage and culture.
5. The need to connect crafts to contemporary lifestyles and to the new profiles of consumers thus expanding the scope, usage and application of the crafted products.
6. To find a way to explore the interrelation between design, art and craft as a virtuous circle of added value for the three parts.

Therefore, with awareness of the singularities of the crafts' sector and its challenges, this study aims to fulfil the following objectives:

KEY OBJECTIVE

Through a characterisation and assessment of the European market for crafts we aim to present compelling evidences on the size, nature and prospects of this sector, supporting the insights with quantitative and qualitative proofs of the volume and value of the market to serve as a call to action for governments and institutions.

Complementary objectives:

- To gain knowledge on the trends of consumer behaviour that may influence the sector and identify the opportunities and challenges posed by these emerging trends.
- To identify prior consumption “universes” and their motivations, needs and lifestyles (crafts’ consumers) in order to classify and develop strategies to match them.
- To assess the size and shape of the EU market for crafts thus gaining perspective and discovering its true impact in Europe.
- To identify the skills gaps in the sector and explore the alternatives of how to narrow those gaps over time.
- To know the characteristics of the working conditions of craftspeople in the EU and their implications for the future prospects and survival of the sector.
- To find the sustainability vectors applicable to the craft sector and identify success cases of good practices.

II. Executive summary

This study has been commissioned by the European Crafts Alliance and conducted by Ohayō. Framed in the project “Crafting”, it is the first in a series of research projects which analyse the state of the sector in Europe.

Img. 1: Mohsen Ameri © via Unsplash

II / 01

Crafts' consumer behaviour in 2022* and consumption trends

Through the analysis of a survey administered to a total of 820 respondents living across 8 European countries, we have depicted the profile of the contemporary consumer of crafts. The survey has been conducted in: Denmark, Finland, Germany, Ireland, Norway, Slovakia, Spain and Sweden using a balanced correspondence among their representation of main European areas and the final number of respondents of each region. Only a sample of the total adult population in every country was interviewed for this study so we cannot be certain that the figures obtained are exactly those we would have found had every adult in Europe been interviewed. However, we can provide a good picture of a broad sample of citizens regarding their profiles and nature.

Insights unveiled from this survey have been combined with research based on complementary information sources, including the cases studies and trends report of Ohayō's trends observatory Otō. Furthermore, there have been conducted a total of 34 in-depth interviews: 19 to craftspeople and 15 to crafts experts across 12 European countries (Belgium, Denmark, Finland, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Slovakia, Spain and Sweden).

*The study has been conducted in 2023 but, as the respondents answered about their experiences during the last 12 months, the year of reference in the titles is 2022.

WHO IS THE BUYER OF CRAFTS

According to the results of the survey to citizens living in Europe, the crafts buyer in Europe is predominantly female (69% of the respondents buyers of crafts), is evenly distributed in the age ranks of: 20 to 35 years old (29% of the total respondents), 36 to 45 years old (22%), 46 to 55 years old (24%) and 56 to 70 years old (26%). Their main occupations are: company employee (43%), followed by freelance or self-employed (25%), retired (13%) and civil servant (12%). Most of them claim to be users of social media. 77% of them use Facebook, 71 % of them use Instagram, and 41% of them use Pinterest. Most of them buy crafts for themselves (79%) and as a present (55%).

Classification according to their intensity and level of investment in crafts:

1. **The investor**, who buys craft for a value higher than 1.001 € a year. They represent 7% of the craft buyers.
2. **The craft lover**, regular buyer, who buys between 301 € and 1.000 € and mainly more than 3-4 times a year (even more than 6 times a year). They represent 22% of the total craft buyers.
3. **The novel buyer**, whose expense in craft is among 101 and 300 € and represent 34 %.
4. **The occasional buyer**, whose expense is between 30 and 100€, mainly they buy 1-2 times or 3-4 times, and represent 36%.

THE NON BUYER OF CRAFTS

There is the potential buyer and the rejector. Only 5% of them affirmed that they agreed or totally agreed on the statement "I wouldn't buy anyway, I am not interested in crafts", so most of them would buy given certain circumstances. The main prohibitive factors mentioned are:

"I would buy crafts if they were available at the stores that I visit regularly" and "If had the occasion".

WHAT AND HOW DO THEY BUY

When asked "What do they buy most often", the most mentioned categories are ceramics, textile crafts, woodworking crafts and jewellery, followed by glass and leather crafts. The prevalence of ceramics appears in every consulted country and there are some differences depending on the country for the second most mentioned craft.

39% of the crafts buyers bought 3-4 times during the last 12 months. 30% of buyers acquired crafts 1 or 2 times during the same period. 17% bought 5-6 times and 15% of them bought more than 6 times.

In terms of expense in crafts, we have studied those that have spent from 30€ to 3.000€ during the last 12 months. 50% of the respondents have spent 200€ or less during that period. The average expense is 355€: 36% spent 100 € or less, 21% between 101€ and 200€, 28% between 201€ and 600€, and only an accumulated 15% had spent more than 600€.

WHERE DO THEY BUY CRAFTS

Depending on the type of craft and also the orientation of the craftsperson’s business, certain distribution channels may have more or less usage. When asking about where did the surveyed people buy crafts, an important percentage answered “at a craft fair” and “at a craft or design shop”, followed by “directly from the craftsperson online” and “at the craftsperson’s workshop”.

The distribution channels for crafts varies depending on the country and region. This is related, among others, to the shopping culture, the development of certain retail models and also the type of the predominantly demanded craft. In Germany the most common answer is “At a department store”, followed close by “At a farmers market”; in Ireland it is “At a craft or design shop”; in the Nordic countries “At a craft fair”, followed close by “At a craft or design shop”, in Slovakia “At a craft fair”. A notable difference is in Spain where the most frequent answer is “Direct from the craftsperson online” followed close by “At a department store”.

When asked about the places where they buy crafts 51% of the respondents answered “at a craft fair” and 45% “at a craft or design shop”.

INFORMATION SOURCES OF THE CRAFTS BUYER

When asked about where do they look for information when they want to buy crafts, most of the respondents (56%) answered “Through the craftspeoples’ online channels (Web, Instagram, Facebook ...)”, followed relatively far behind (38%) by “At online craft marketplaces where I see the products of many makers”, and (37%) “By word of mouth and personal recommendations” .

According to the responses of the craftspeople and experts, the main information that consumers request when making a purchase decision for crafts includes details on the materials, the production process, and the origin of the product. The price is also a crucial factor for most buyers, and some may be interested in personalization options and guidance in choosing materials. The story behind the product and the maker is also important, especially for art-based pieces. Consumers may also inquire about sustainability, ethical production practices, and the longevity of the product.

MOTIVATIONS TO BUY

The most mentioned motivations for buying were “I am aware of the importance of keeping traditional craft techniques” and “They are one of a kind objects”. 34% of the buyers of craft answered that these were reasons to buy. The third motivation is “I feel a special connection with craft objects” (33%), followed by “I value the natural and authentic materials” (29 %), “I like to support the local economy” (23%), “They are higher quality than industrial products” (20%), and finally “They are an investment” (6%).

Motivations vary depending on the country/region and these differences have been studied in section 01/03.

THE CRAFT CONSUMER “UNIVERSES” OF THE FUTURE

Following the insights of Otō, the Trends Observatory of Ohayō, there have been identified five different emerging consumption universes. The use of “consumer universes” is a resource coming from the trends research field.

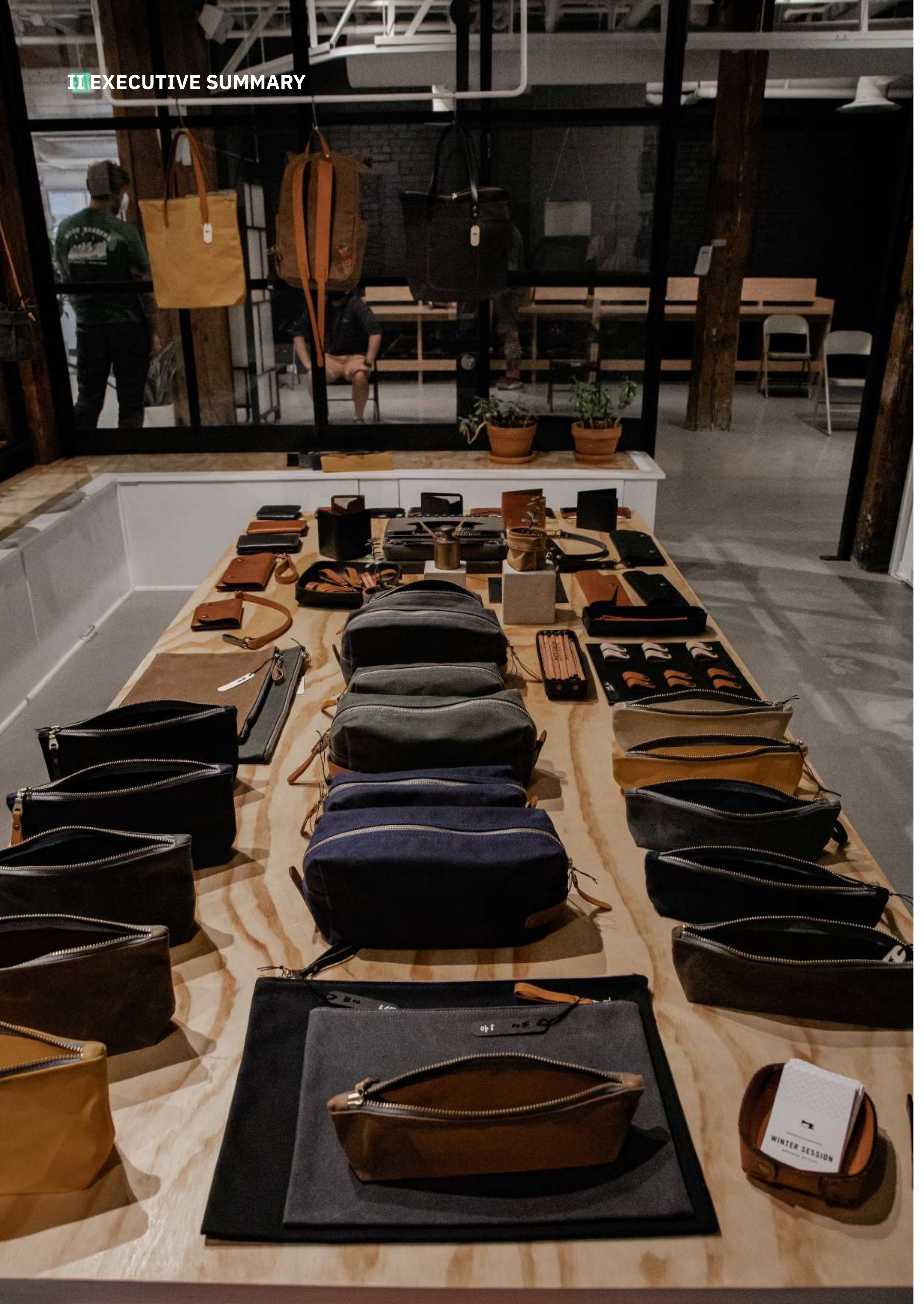
These sketch the profiles of a future citizen-buyer that has already incorporated the new social, cultural and political paradigms of their time.

This methodology allows for the depiction of the buyer of the future. They are the embodiment of a trend. A consumption universe profiles a cast of future buyers each according to their values and motivations. How do they live? How do they eat, dress, buy or spend their time? How do they relate to the crafted product?.

These profiles are:

1. **Beautechnologists.** They award importance to health and beauty
2. **Survivors.** One of the most austere, creative and decisive universes
3. **Updaters.** They evoque the past and have renewed interest for their own and other’s traditions
4. **Essentialists.** In search for freedom, happiness and peace of mind through the simplification of their lifestyles
5. **Ecolovers.** Aware of the effect of consumption in their environment

This information is treated more in depth in the additional report “The New Consumer of Crafts for 2025. Exploring future for crafts”



II / 02

Market characterisation and size in 2022

The assessment of the European market for crafts offers evidences on the size, nature and prospects of this sector. The knowledge derived from this analysis can help in decision making for governments and institutions to energise the economy and improve the conditions of the craft sector, the quality of life of European citizens and the projection of the brand Europe to the world through crafts.

AVERAGE EXPENDITURE ON CRAFTS

Average annual expenditure on crafts for the European crafts buyer has been estimated: 346€ in 2022. The amount of the expenditure rises in correspondence with the age of the buyer. We find averages such as 279€ for buyers between 20 and 35 years old, 302€ for buyers between 36 and 45 years old, 367€ for consumers between 46 a 55 years old and 389€ for buyers between 56 and 70 years old. According to the occupation, it seems to be a higher expenditure among freelancers or self-employed buyers with an average annual expenditure of 440 € and retired buyers with an average of 415€, followed by company employees with 318€.

THE SIZE OF THE EUROPEAN MARKET FOR CRAFTS

Through the data obtained in the survey, it has been estimated the size of the European market for crafts, in million of citizens, and the serviceable available market (SAM) in value. Further details on the methodology of calculation can be found in section 02/03. The estimated size of the serviceable available European market for crafts is 153 million people in Europe, and 50 billion euro in value.

COMPETITIVE ENVIRONMENT AND CHALLENGES IN THE SECTOR

There is no consensus on whether competition in the craft business has increased or decreased in the last few years. Some of them believe that there has been an increase in competition due to more young people entering the field, while others think that the competition has remained more or less the same. It is interesting to highlight that some of them mentioned that there is a stronger sense of community within the craft industry.

Based on the responses from the experts and craftspeople, it can be concluded that the European crafts sector's main strengths are in its coexistence of tradition and innovation, the link with the particular territories and its culture, and its individual and experimental attitude towards craft-making. When asked about the weaknesses, the main issue mentioned is the lack of entrepreneurial skills and a proper mindset for business, together with the high costs for producing and shipping, expense taxes, the lack of marketing and distribution networks. Regarding opportunities, the most significant point of agreement between the experts and craftspeople is that there is a growing interest in crafts, and this trend is beneficial for the sector. However there are threats such as the decrease in the purchasing power of the general population and/or the availability and price of materials, together with rigid tax systems represent difficult obstacles for small craft businesses.

KEY DRIVING FACTORS

The experts and craftspeople agree that education and training are key factors to guarantee the future of crafts. Both experts and craftspeople recognize the importance of adapting to market trends and demand, with a focus on sustainability, local materials, and production, as well as social innovation. It is also crucial to pass on the skills to the next generations, and this can be achieved through education and apprenticeship programs which should be a shared responsibility.

Craftspeople also express the need for support from government and local organisations', new types of professional qualifications, and export incentives.

II / 03

The jobs in crafts: working conditions, skills and future prospects

Current working conditions and the perception by the professionals involved will determine the sustainability of a highly skilled intensive labour activity. Through the in-depth interview to 34 experts and craftspeople in 12 countries, we have captured the sentiment of the specialists.

Img. Andrew Ruiz © via Unsplash

CURRENT WORKING CONDITIONS OF CRAFTSPEOPLE

The working conditions of craftspeople have changed over the years, with some facing challenges such as high living costs, ageing skilled workforce, and a lack of younger practitioners in many trades. The general opinion is that working conditions for craftspeople in Europe vary, some of them think they are reasonable but there is room for improvement, some other mention insecure working conditions. Most of the craftspeople interviewed do not live solely on their sales of crafts. The composition of their incomes varies greatly. From the sample of interviewed professionals: 20% of them make a living solely with their crafts sales, 60% of them make 50% or more of their incomes from sales of crafts or crafts related activities, and the last 20% makes less than 50% of their incomes from sales of crafts or crafts related activities. Some of the alternative sources of economy mentioned are: teaching (crafts and other subjects not related to this), collaboration with art galleries or museums and grants.

PERCEPTION ABOUT THE FUTURE OF THE CRAFTS JOBS

The current perceived state of crafts jobs is mixed. On one hand, there is a growing appreciation for handmade and artisanal products, and many customers are willing to pay a premium for them. However, on the other hand, there are concerns that many traditional crafts are being lost as younger generations are not as interested in learning these skills. In addition, many crafts jobs are low-paying and may not offer the same level of stability and benefits as other professions. The sustainability of the jobs at crafts will also depend to a great extent of the tax and legal policies carried by national and local governments.

IDENTIFICATION OF THE GAPS IN SKILLS AND EDUCATION OF CRAFTSPEOPLE

There is a common agreement that gaps exist in the skills of craftspeople, particularly in business and marketing. Additionally, the changing focus within craft practices, teaching methods, and new technologies are also mentioned as contributing factors to a better education. There are some areas of disagreement between the two groups (craftspeople and crafts experts). For example, while the experts emphasise the need for training in branding and storytelling, the craftspeople focus more on the need to find training on how to monetize their creative skills. It is worth mentioning that there is a high level of satisfaction with education on crafts among the interviewed of the Netherlands, Sweden and Germany.

PERCEPTION ON THE USE OF TECHNOLOGY AS A COMMUNICATION AND PRODUCTION TOOL

The opinions of craftspeople and experts on the use of technology in crafts seem to be similar in many ways. Both groups see technology as a valuable tool that can be used for both purposes. Many respondents believe that technology can enhance the craft industry by making it more efficient and allowing for new materials and techniques to be used. However, they also note that traditional craft skills and handmade processes are still essential and should be somehow prevailing.

Introduction

What's the role of the craftsperson in our society? What do we understand by "crafts"? Is the image of crafts positive and contemporary? How do craftspeople feel about the constantly evolving post-pandemic nature of the economy? What are the habits of the buyers of crafts and why do non-buyers not buy? The study that you have in your hands right now tries to answer some of these questions and offers a journey through the crafts's consumer behaviour, the market of crafts in Europe, the jobs in crafts, the new territories of crafts and ends in a sort of conclusions and recommendations that aim to open new avenues for studying and knowing the sector in the future.

01

Crafts' consumer behaviour in 2023 and consumption trends

Img.:Brooke Cagle © via Unsplash

New social concerns among younger generations, global transforming events, shifts in the way of understanding family, work and leisure, along with a long list of technologies ready to change production and consumption patterns, are shaping the behaviour and profiles of citizens-consumers whose needs and drivers are key for producers.

Craftspeople and crafts businesses count on numerous attributes aligned with a more gentle and conscious way of consuming. Despite the digitalisation of the material world, objects are important to people and are acquiring new roles as representatives of memories, care, wellness, nature and heritage.

Through the analysis of a survey administered to a total of 820 respondents living across 8 European countries (in order to balance the analysis a total of 698 of the 820 surveys were used as some regions had an over abundance of surveys), we have depicted the profile of the contemporary consumer of crafts. The survey has been conducted in: Denmark, Finland, Germany, Ireland, Norway, Slovakia, Spain and Sweden using a balanced correspondence among their representation of main European areas and the final number of respondents of each region. We have considered buyer of crafts to those that had bought during the last twelve months. **Only a sample of the total adult population in every country was interviewed for this study so we cannot be certain that the figures obtained are exactly those we would have found had every adult in Europe been interviewed. However, we can provide a good picture of a broad sample of citizens regarding their profiles and nature**.

Insights unveiled from this survey have been combined with a research based on complementary information sources, including the cases studies and trends report of Ohayō's trends observatory Otō. Besides, there have been conducted a total of 34 in-depth interviews: 19 to craftspeople and 15 to crafts experts across 12 European countries (Belgium, Denmark, Finland, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Slovakia, Spain and Sweden). These intensive individual interviews have explored their perspectives on the craft market. Thanks to this combined approach we can provide knowledge about the profiles, habits and motivations of the crafts' consumer in 2023 and glimpse how they will be in the near future. This information enables the European craftspeople to find ways to align their practice and offer to the crafts' consumers of the future, who live and invest their money based on renewed motivations and values. Further detail about Otō's research methodology has been included in the Appendices of this report.

Img. 1: Keila Hotzel © via Unsplash

01 / 01

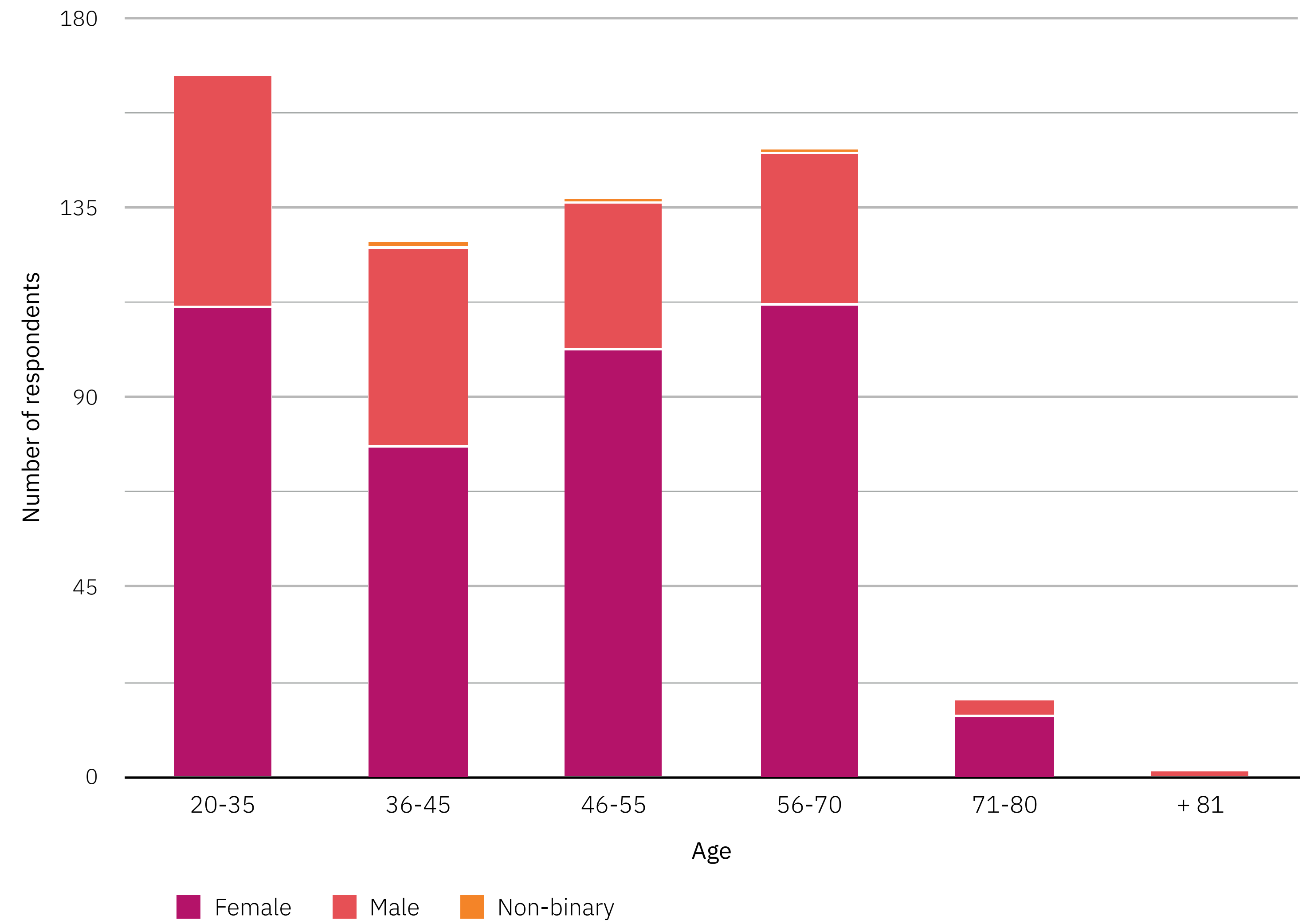
Who is the buyer of crafts

A brief review of the demographic profile of the buyer of crafts is the starting point to depict the consumer crafts in Europe in 2022. It has been possible too to know who is the non-buyer of crafts and what are the main the reasons for their reluctance.   Additionally, craftspeople and experts have provided insights, based on their experience, about the buyer of crafts and how do they perceive changes in their profile during the last years.

Img.: David Dvoracek © via Unsplash

PROFILING THE BUYER OF CRAFTS

According to the results of the survey to citizens living in Europe, the crafts buyer in Europe is predominantly female (69% of the respondents buyers of crafts), evenly distributed in the age ranks of: 20 to 35 years old (29% of the total respondents), 36 to 45 years old (22%), 46 to 55 years old (24%) and 56 to 70 years old (26%). Their main occupations are: company employee (43%), followed by freelance or self-employed (25%), retired (13%) and civil servant (12%). Most of them claim to be users of social media. 77% of them use Facebook, 71 % of them use Instagram, and 41% of them use Pinterest. Just 6% of the surveyed have answered that they don't use any of the social media mentioned in the questionnaire.

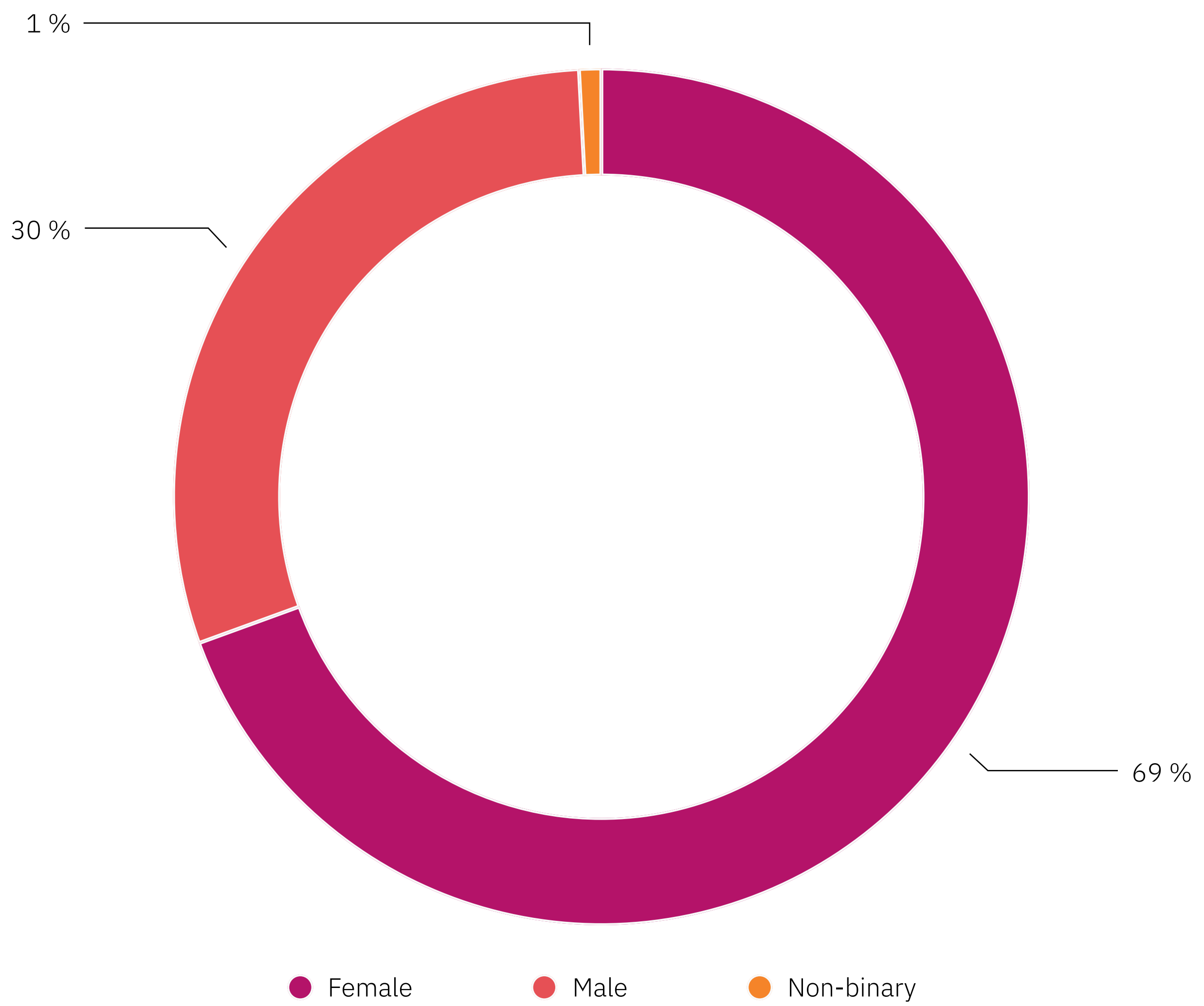


Graph 1. Number of buyer respondents by age of the sample

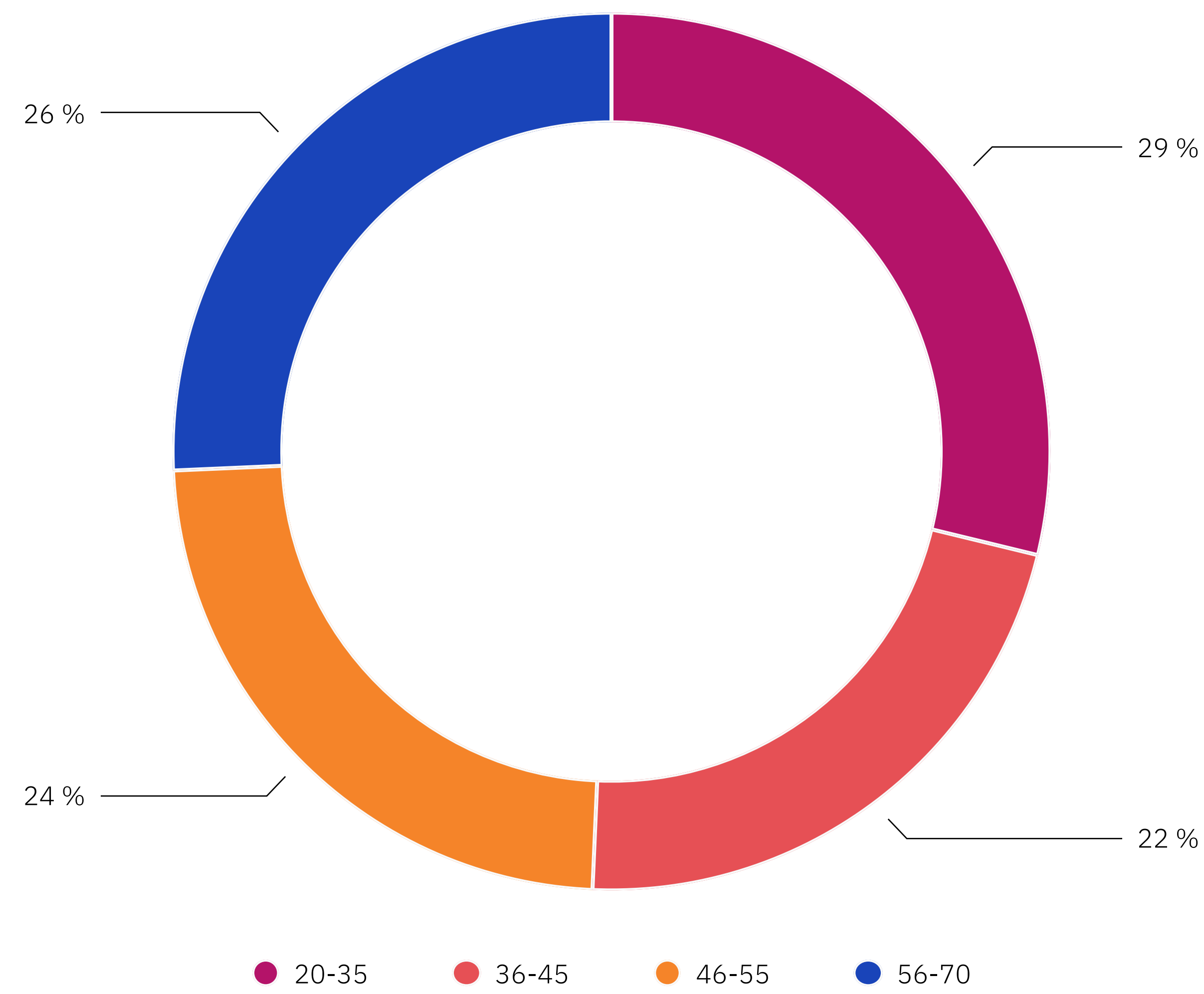
	20-35	36-45	46-55	56-70	71-80	+ 81	TOTALS
Female	111	78	101	112	14	0	416
Male	55	47	35	36	4	1	178
Non-binary	1	2	1	1	0	0	5
TOTALS	**167**	**127**	**137**	**149**	**18**	**1**	**599**

Table 1. Number of buyer respondents by age

PROFILING THE BUYER OF CRAFTS

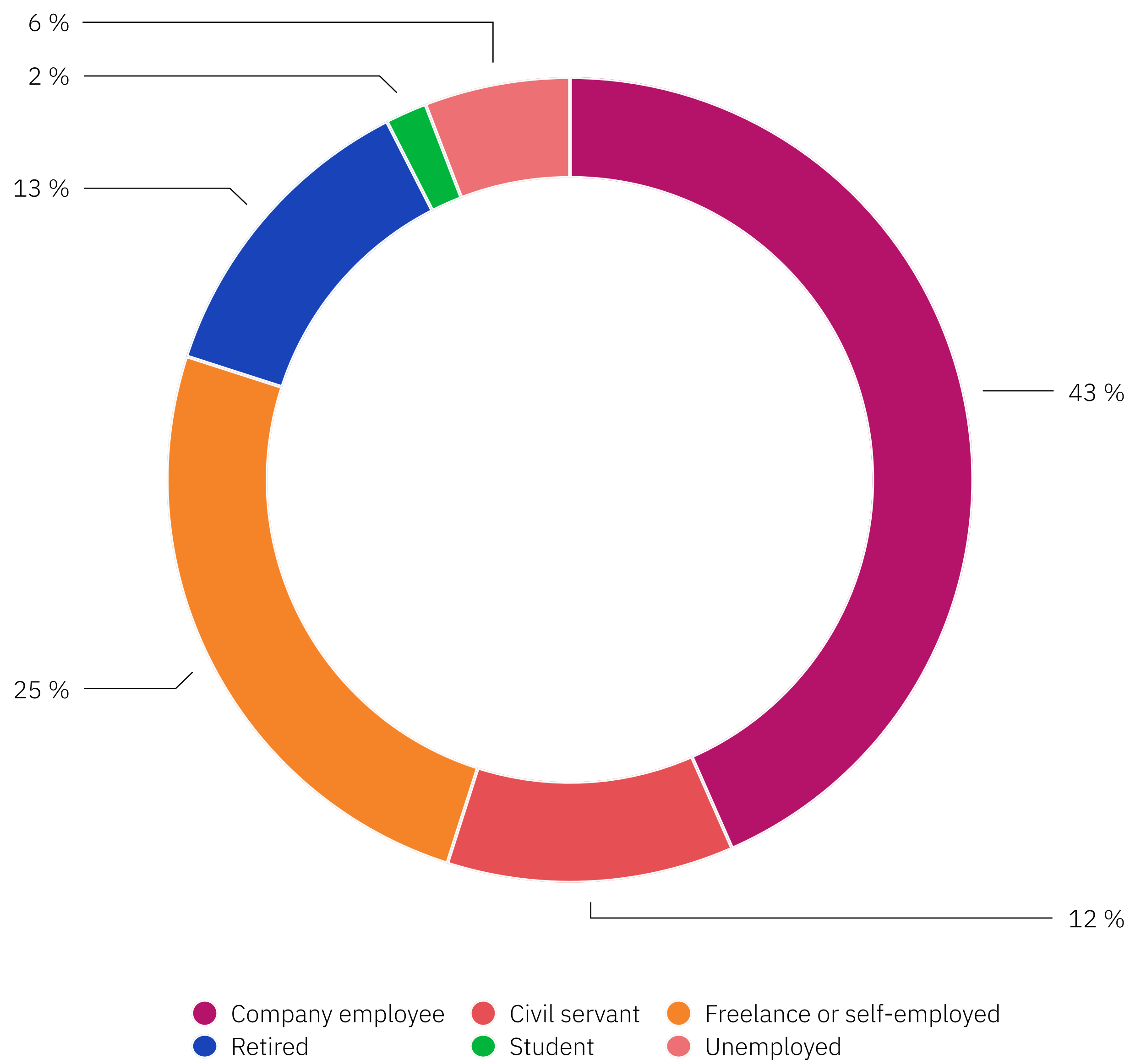


Graph 2. Composition of the sample of the buyer of crafts by gender

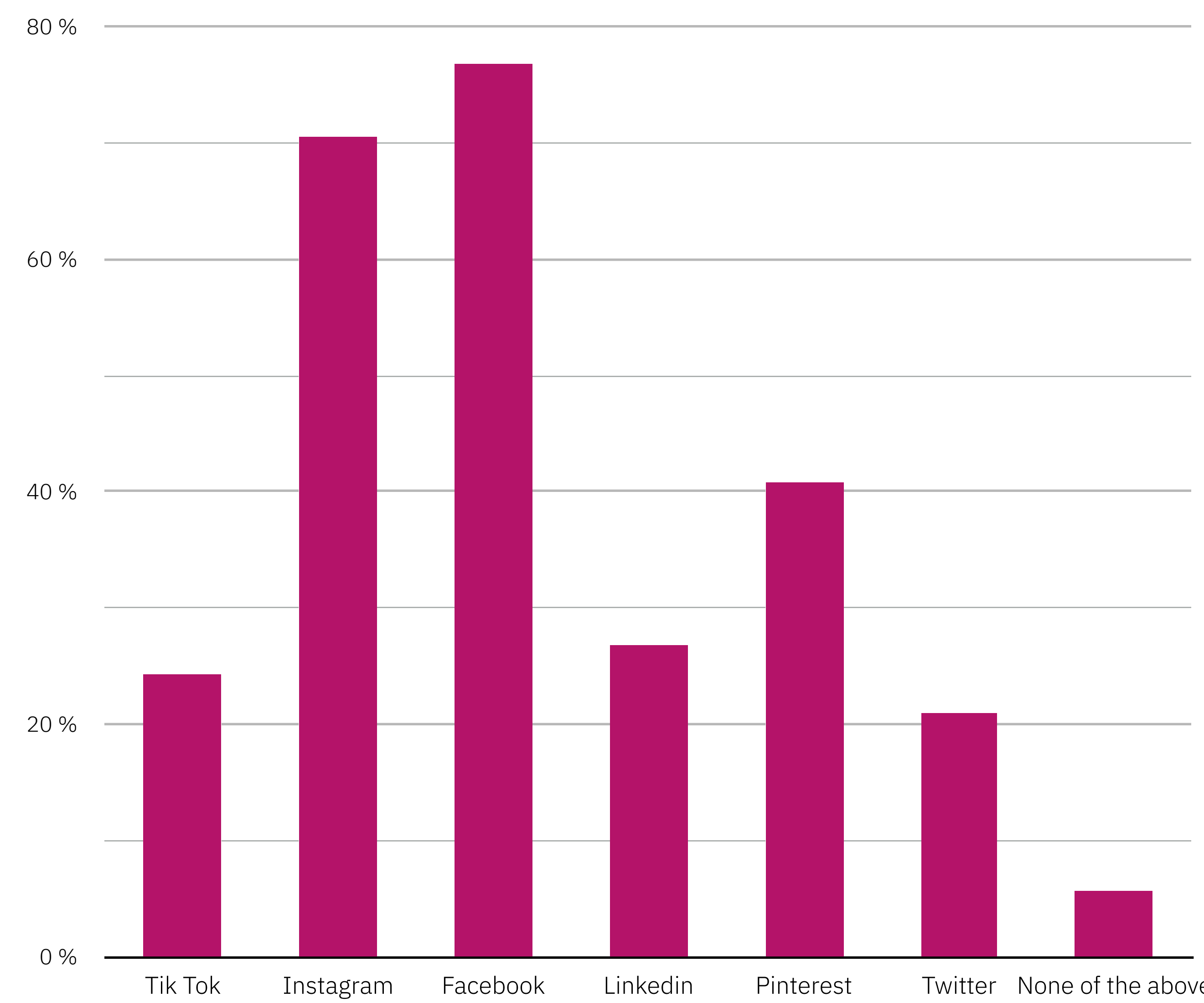


Graph 3. Composition of the sample of the buyer of crafts by age

PROFILING THE BUYER OF CRAFTS



Graph 4. Proportion of buyer respondents by occupation



Graph 5. Use of social media among the buyer of crafts

PROFILING THE BUYER OF CRAFTS

Classifying the buyer depending on their intensity and level of investment in crafts, 4 main categories are identified:

1. **The investor**, who buys craft for a value higher than 1.001 € a year. It represents 7% of the craft buyers.
2. **The craft lover**, regular buyer, who buys between 301 € and 1.000 € and mainly more than 3-4 times a year (even more than 6 times a year). It represents 23% of the total craft buyers.
3. **The novel buyer**, whose expense in craft is among 101 and 300 € and represents 34 %.
4. **The occasional buyer**, whose expense is between 30 and 100 €, mainly they buy 1-2 times or 3-4 times, and represent 36%.

	1-2 TIMES	3-4 TIMES	5-6 TIMES	+ 6 TIMES	TOTALS
30 € - 100 €	17 %	14 %	2 %	2 %	36 %
101 € - 200 €	5 %	10 %	4 %	2 %	21 %
201 € - 300 €	3 %	4 %	4 %	2 %	13 %
301 € - 600 €	1 %	7 %	4 %	3 %	15 %
601 € - 1000 €	1 %	2 %	2 %	3 %	8 %
1001 € - 3000 €	1 %	1 %	1 %	3 %	6 %
3001 € - 5000 €	0 %	0 %	0 %	0 %	0 %
More than 5000 €	1 %	0 %	0 %	0 %	1 %
TOTALS	30 %	39 %	17 %	15 %	100 %

Table 2. Frequency of purchase and expense in relative terms

WHO IS THE NON BUYER OF CRAFTS?

15% of the surveyed individuals claimed not to have bought craft during the last 12 months. Their answers have been used to reach a better understanding of the reasons why they haven't bought and extrapolate from that information new ways of attracting such reluctant buyers to the crafts market.

The non buyers of crafts have been classified into two typologies: the convincible non-buyer and the rejector. In the first case there are reasons to think that we can attract or recover them as craft buyers and craft supporters. In the second typology we may conclude that there is no interest whatsoever from their part to buy craft neither now nor in the future. This second typology corresponds to those who agreed or totally agreed with the statement "I wouldn't buy anyway, I am not interested in crafts".

Only 5% of the non buyers respondents affirmed that they agreed or totally agreed with that statement.

Most of the respondents would buy given certain circumstances. Analysing the conditions under which the consumer would be willing to buy crafts, we find that a change in the price is a lesser significant stimulus for them to change their mind. It is in that statement "they were cheaper" where we find the highest indifference among the respondents (41%).

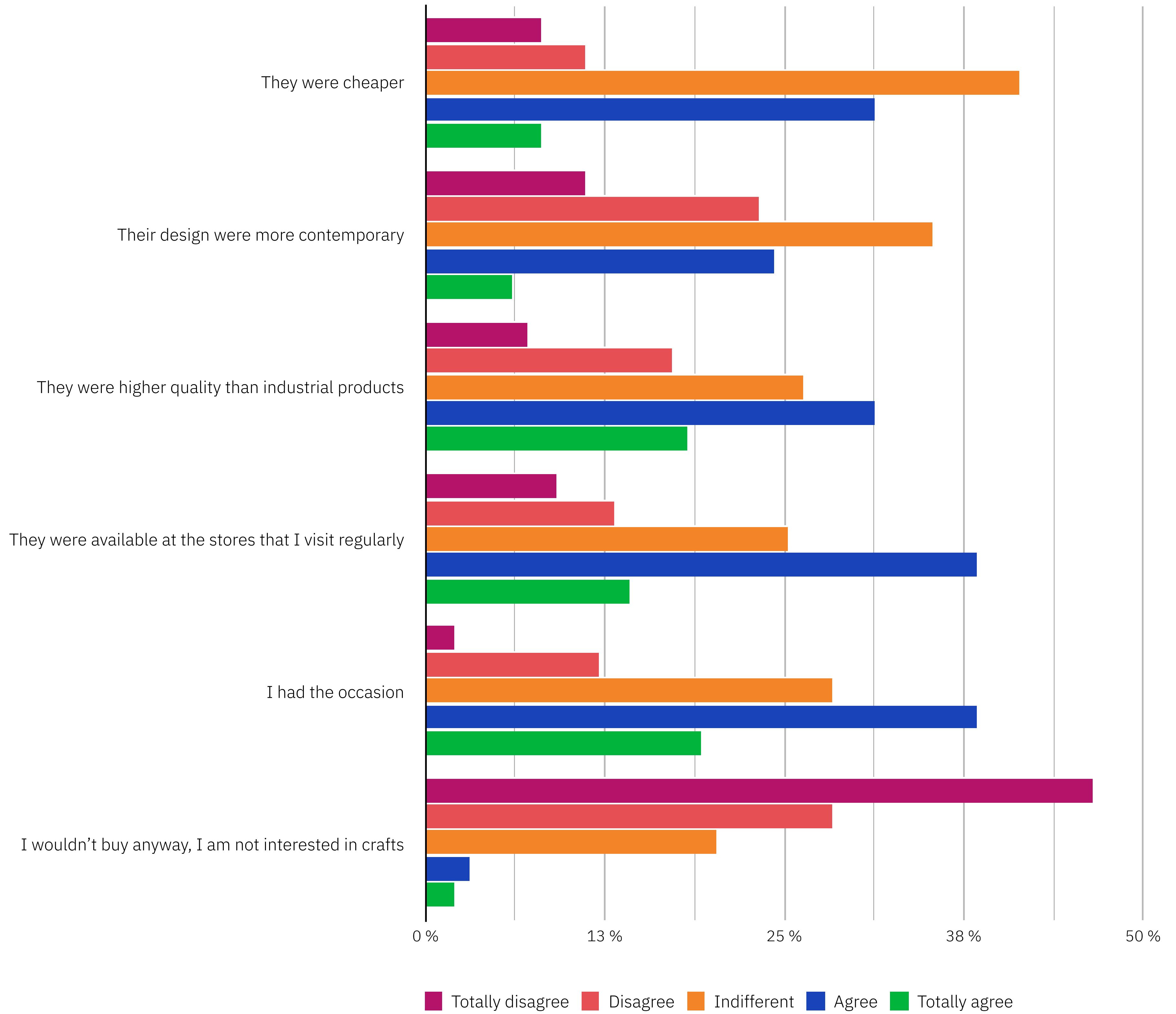
However, 38% of respondents agreed on both of the statements: "I would buy crafts if they were available at the stores that I visit regularly" and "If had the occasion". They were followed by "If they were higher quality than industrial products", together with "If they were cheaper", both with a 31% of respondents agreeing on those statements. If we look at the statements with the higher rates of "Totally agree", we find "If I had the occasion" (19%) and "If they were higher quality than industrial products" (18%), followed by "If they were available at the stores that I visit regularly". Here we find the need for improvement regarding distribution of the product. Communication campaigns could be useful to move the consumer to buy craft on special occasions. Also, to raise awareness on the importance of improving performance of crafted objects may contribute to positively to the perception of the consumer about their quality.

WHO IS THE NON BUYER OF CRAFTS?

	TOTALLY DISAGREE	DISAGREE	INDIFFERENT	AGREE	TOTALLY AGREE
They were cheaper	8 %	11 %	41 %	31 %	8 %
Their design were more contemporary	11 %	23 %	35 %	24 %	6 %
They were higher quality than industrial products	7 %	17 %	26 %	31 %	18 %
They were available at the stores that I visit regularly	9 %	13 %	25 %	38 %	14 %
I had the occasion	2 %	12 %	28 %	38 %	19 %
I wouldn't buy anyway, I am not interested in crafts	46 %	28 %	20 %	3 %	2 %

Table 3. I would buy crafts if ... Relative importance

WHO IS THE NON BUYER OF CRAFTS?



Graph 6. Proportion to the statements I would buy crafts if ... among non buyers of crafts

PERCEPTION OF THE CRAFTSPEOPLE AND CRAFTS EXPERT ABOUT THE BUYER OF CRAFTS

As a complementary view to the results of the survey, craftspeople and crafts experts were consulted about their perception regarding changes in the profile of the crafts buyer. These answers are the fruit of their personal particular experiences, not every consulted craftsperson or retail expert's client is a final consumer. Some of them sell their work to cooperatives, to interior designers, to theatre costume technicians and a wide range of non individual buyers. Here below there is a classification of the crafts buyer according to their nature:

- **High-end collectors**: buyers who view craft pieces as contemporary art. They consider the purchase as an investment that they could resell at a higher price in the future.
- **Professional buyers** such as interior designers, decorators, retailers or intermediaries, producers, artists, performing arts technician, film industry, etc.
- **End-users**, buyers with an utilitarian purpose, who buy crafts to use them in their daily lives. They substitute industrial mass-produced items for handmade or non mass-produced objects.
- **Novel collectors**: buyers with interest in having objects as a collection of items to contemplate and enhance their homes and offices.

Some respondents believe that the age of buyers has remained stable, with the majority being above 40 years old, which coincides with the results of the survey to citizens living in Europe described above (an accumulated 50% were above 46 years old, including those aged above 36 they would reach 72% of the respondents). Others have noted an increase in younger, well-informed buyers who see craft purchases as an investment or who are motivated by ecological lifestyles and sustainability. Some have mentioned that well-off younger people are also interested in one-of-a-kind objects or well-designed functional ware. Additionally, there has been a growing interest in crafts and sustainability, and many fine artists have started using craft techniques in their art pieces.

In terms of the impact of Covid-19, some respondents noted that there was a decline in orders during the pandemic, but others noted that there was an increase in sales after the worst of the lockdowns, as people had more funds to spend.

There was agreement among respondents that consumers are looking for local and transparent production/products, and that there has been an increase in the demand for traditional and durable products. Some have also noted that the younger generation is motivated by identity, sustainability, and durability. Social media has played a significant role in helping craft makers connect with new buyers, particularly among younger generations.

Although there are some differences among respondents, there is an overall agreement that there has been some change in the profile of consumers over the last years, particularly in terms of sustainability and younger buyers. However, some respondents have noted that the change has been gradual and that the majority of buyers still belong to the same age group.

DANIELA KYTKOVÁ, GALLERY AND DESIGN CONCEPT STORE OWNER: VPRIESTORE (SLOVAKIA).

"… Craft products are no longer just for decoration and presentation in a showcase."

DIMITAR STANKOV. CONTEMPORARY JEWELLERY AND ART OBJECTS (BELGIUM).

"(About changes in the buyer's profile) Not for people who collect them as art pieces. For the others, may be yes. The younger are more shy to buy. And they can find nice pieces in design shops which are less frightening. Jewellery is easier to sell because they can use it and show it in a way they are not as common as everybody."

01/ 02

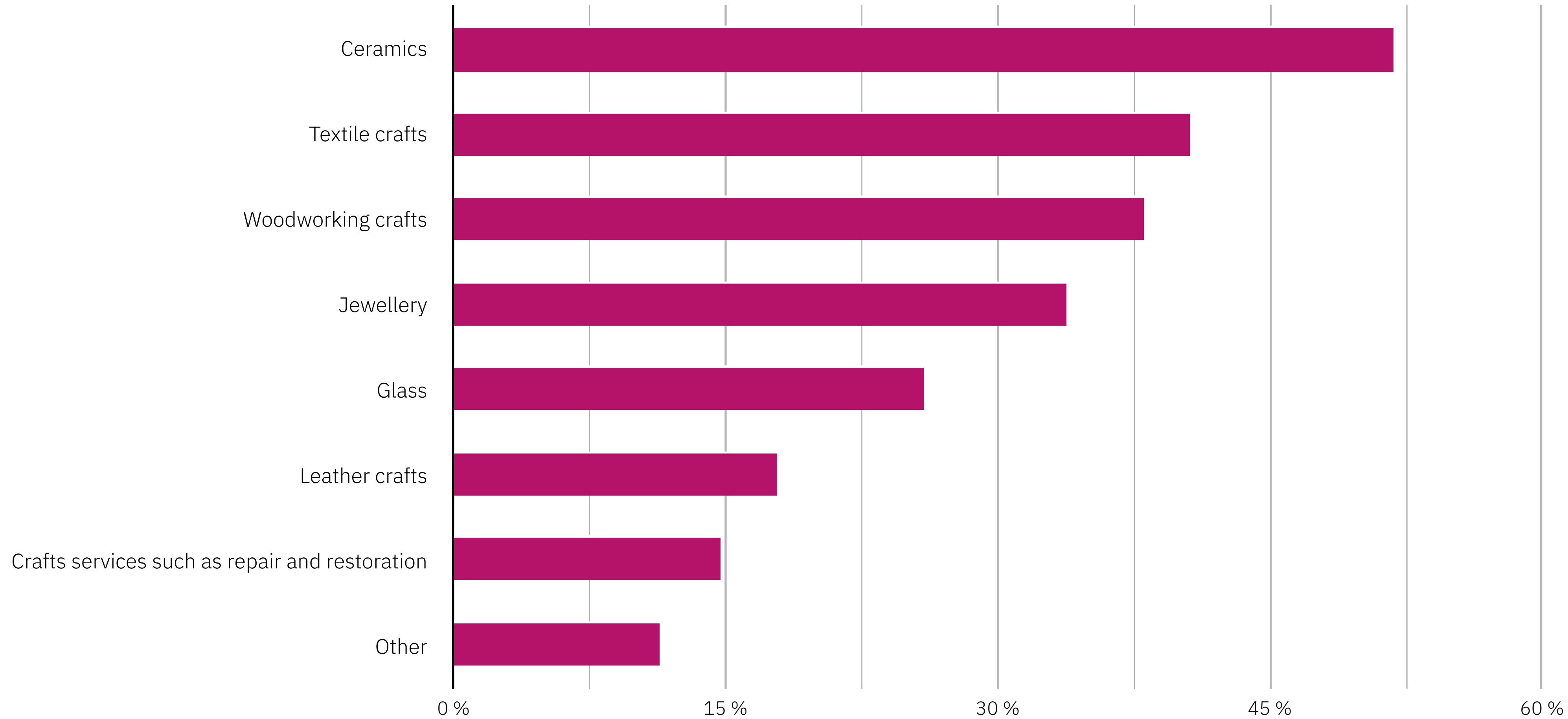
What and how do they buy

To fully understand the dynamics of the purchasing of crafts and craft services it has been analysed what do consumers buy, how often, how much do they spend, where do they buy, on which occasions they buy and where do they look up information before buying. The survey was administered during February and March of 2023. Insights found in the research shed light on the preferences and the habits of crafts consumers. These insights are useful for craftspeople but also for crafts supporting bodies and policy makers as it gives us information on the presence and importance of crafts for the citizens, the expenditure and the growth possibilities, the channels where they best prefer to buy and therefore they can be fostered or supported with policies, and the type of details and media that they consult before buying. Consumer driven support policies for crafts in Europe may find guidance in the next lines for tactical programmes based on evidences.

Img.: Carrie Beth Williams © via Unsplash

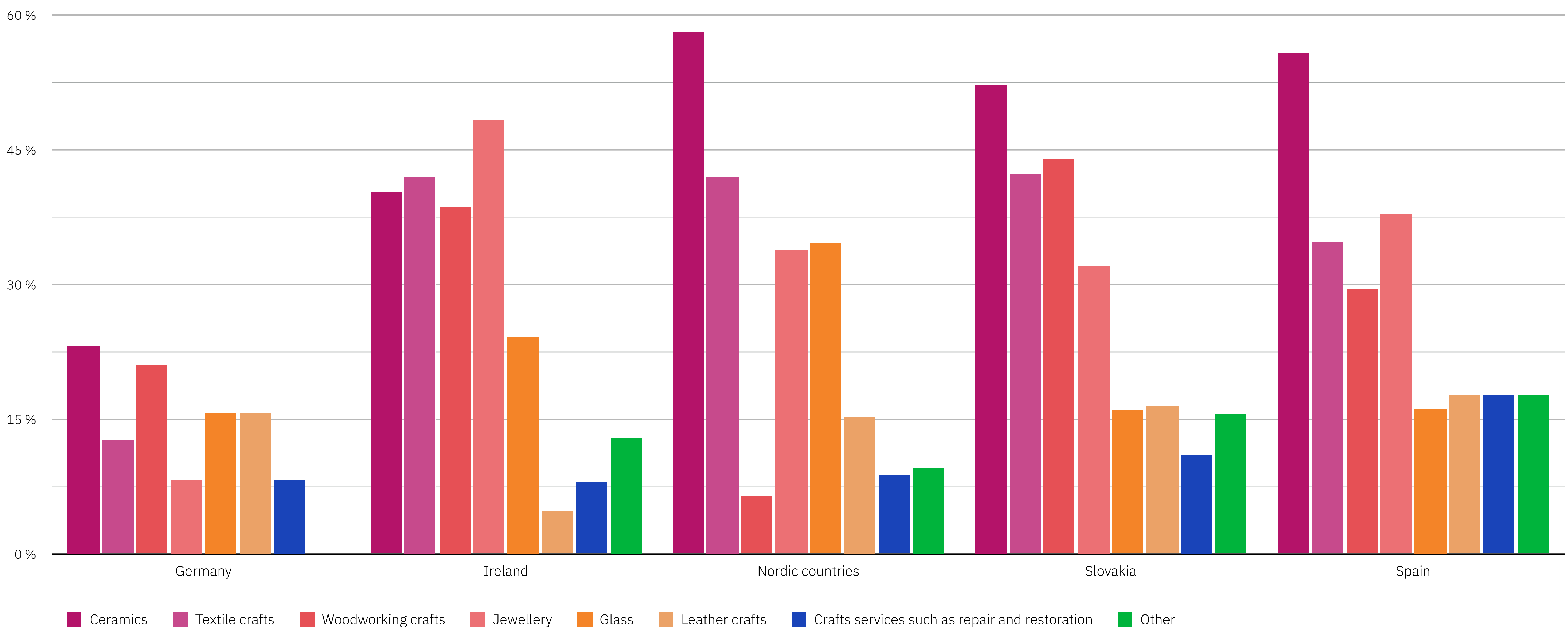
WHAT DO THEY BUY MOST OFTEN?

The categories most mentioned are ceramics, textile crafts, woodworking crafts and jewellery. Among "other", they have been mentioned metalworking, natural fibres items, basketry, candles, natural soaps, lighting, instruments or paper crafts. The predominance of ceramics among the different countries and regions is almost absolute. Only in the case of Ireland is there found a difference where jewellery and textile crafts surpass ceramics as the most mentioned. In Germany woodworking crafts are the second most mentioned. In Nordic countries, 58% of respondents answered ceramics, and 42% textiles crafts. In Slovakia, 52% answered ceramics followed by a 44 % of woodworking crafts, while in Spain 56% answered ceramics and 38% answered jewellery for second place.



Graph 7. Proportion of answers for each type of craft bought within the last 12 months

WHAT DO THEY BUY MOST OFTEN?

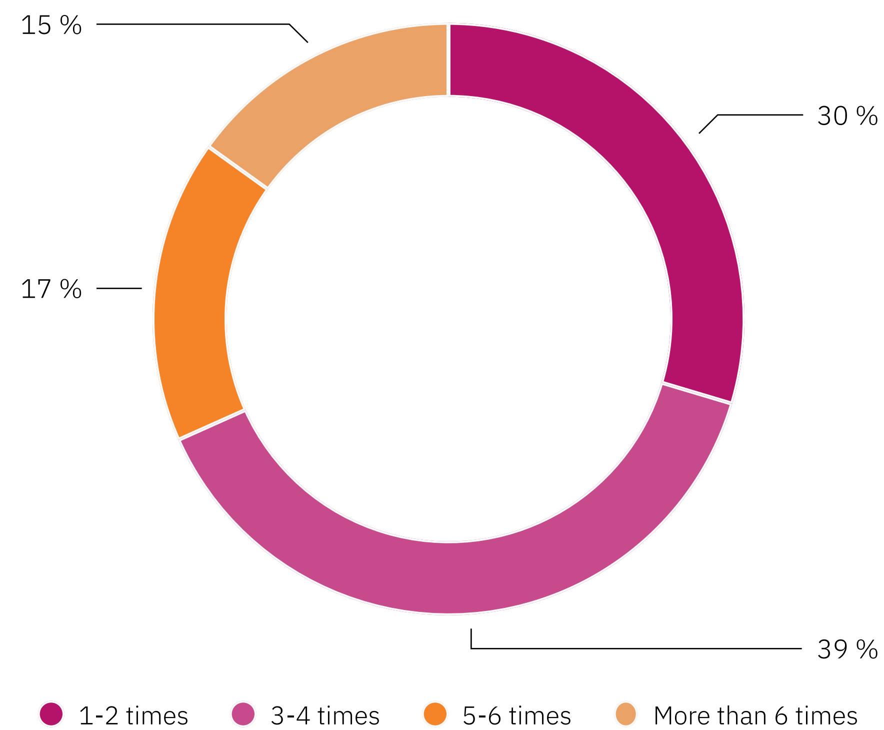


Graph 8. Crafts bought within the last 12 months by country/region

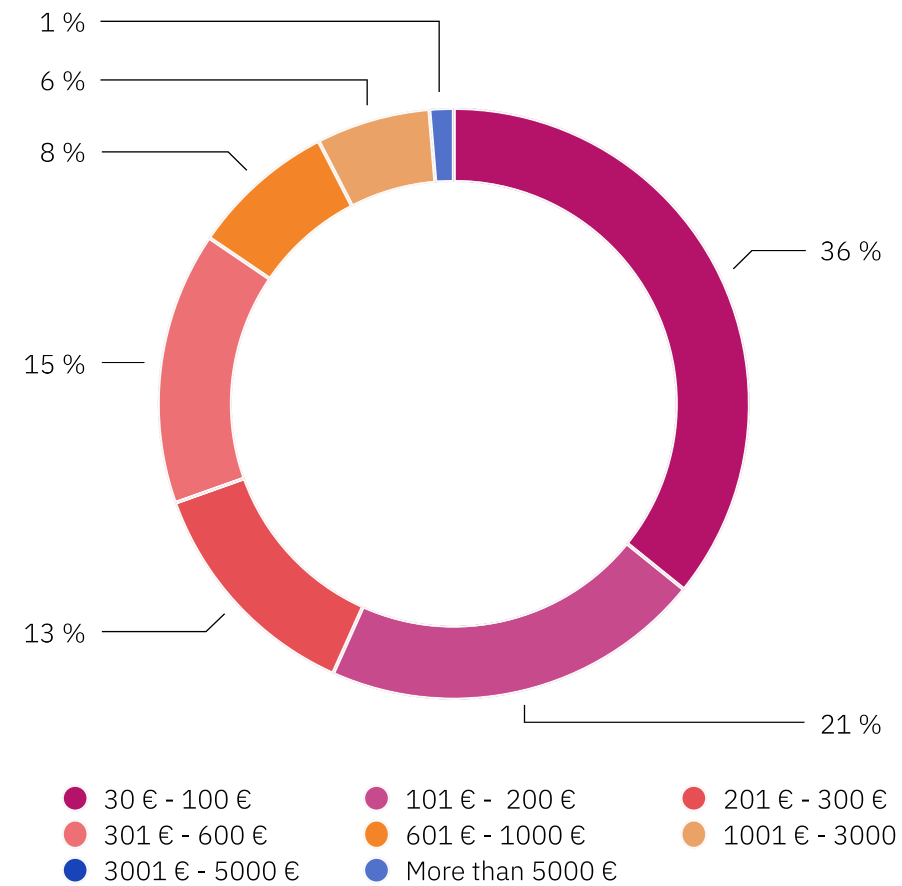
FREQUENCY OF PURCHASE AND EXPENDITURE

Regarding the frequency of purchase, 39% of the crafts buyer bought 3-4 times during the last 12 months, followed by 30% of buyers who acquired crafts 1-2 times during the same period of time. 17% bought 5-6 times and 15% of them bought more than 6 times.

In terms of comparative expense we have studied those that have spent from 30€ to 3.000€ during the last 12 months. Not included in the calculation of the averages, was a set of 4 responses above 30.000€, one response of 5.000€ and one response of 10.000€ with the aim of not introducing overt biases that may unduly skew the figures and hence the conclusions. The most answered amount has been 100 €, followed by 200 €. 50% of the respondents have spent 200€ or less during that 12 month period. The average expense is 346€. 36% spent 100€ or less, 21% among 101€ and 200€, 28% among 201€ and 600€, and only an accumulated 15% had spent more than 600€.



Graph 9. Frequency of purchase in relative terms during the last 12 months



Graph 10. Proportion of crafts buyers according to expense ranges

WHAT DO THEY BUY MOST OFTEN?

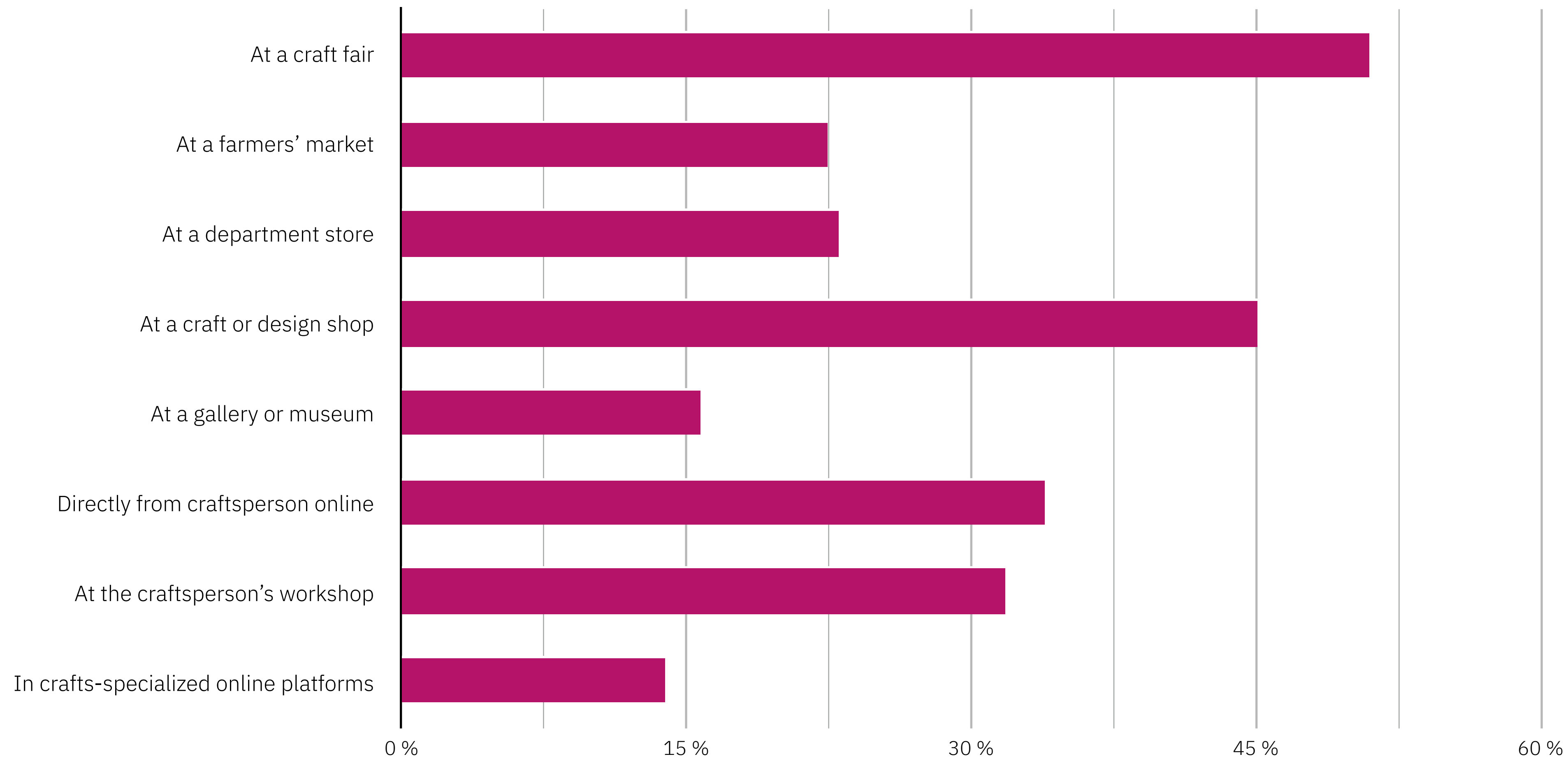
If we cross reference the information of frequency and expenditure, we will realise that the most frequent combination are the groups of buyers who purchased 1-2 times and spent less than 100€, those who purchased 3-4 times and spent less than 100€ and those who bought 3-4 times and spent between 101€ and 200€.

	1-2 TIMES	3-4 TIMES	5-6 TIMES	+ 6 TIMES	TOTALS
30 € - 100 €	17 %	14 %	2 %	2 %	36 %
101 € - 200 €	5 %	10 %	4 %	2 %	21 %
201 € - 300 €	3 %	4 %	4 %	2 %	13 %
301 € - 600 €	1 %	7 %	4 %	3 %	15 %
601 € - 1000 €	1 %	2 %	2 %	3 %	8 %
1001 € - 3000 €	1 %	1 %	1 %	3 %	6 %
3001 € - 5000 €	0 %	0 %	0 %	0 %	0 %
More than 5000 €	1 %	0 %	0 %	0 %	1 %
TOTALS	30 %	39 %	17 %	15 %	100 %

Table 4. Frequency of purchase and expenditure in relative terms during the last 12 months

WHERE DO THEY BUY CRAFTS

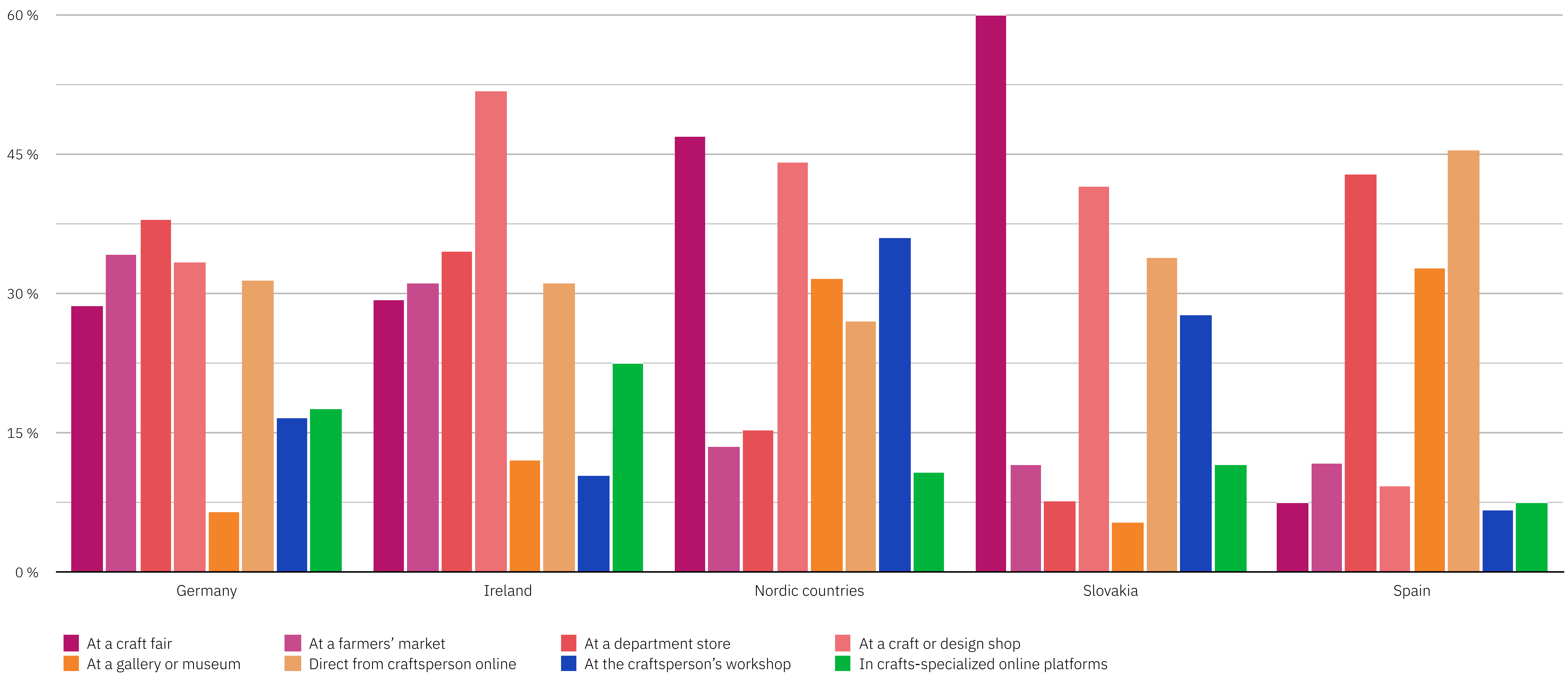
The various types of purchasing channels influence the marketing and communication strategies of craftspeople. Depending on the type of craft and also the orientation of the craftsperson's business, certain distribution channels may have more or less presence. When asking about where the consumer buys crafts, an important percentage answered "at a craft fair" and "at a craft or design shop", followed by "directly from the craftsperson online" and "at the craftsperson workshop".



Graph 11. Percentage of answers to the question "Where did you buy crafts?"

WHERE DO THEY BUY CRAFTS

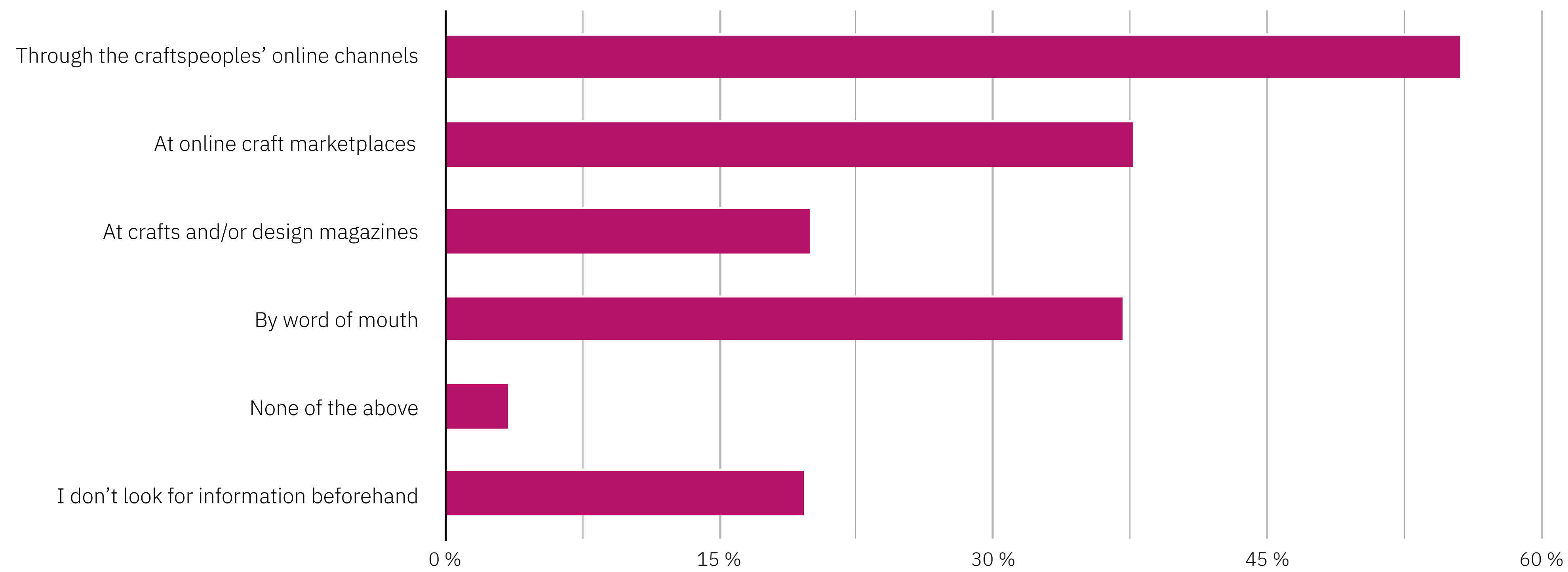
The purchasing channels for crafts varies depending on the country and region. The shopping culture and the development degree of retail in every country also influences the preferred point of purchases. The graph below highlights the most mentioned channels. While in Germany the most common answer is "At a department store", followed close by "At a farmers market"; in Ireland it is "At a craft or design shop"; in the Nordic countries "At a craft fair", followed close by "At a craft or design shop", in Slovakia "At a craft fair". Starkly different is Spain where the most frequent answer is "Direct from the craftsperson online" follow closed by "At a department store".



Graph 12. Percentage of answers to the question "Where did you buy crafts?" per country/region studied

INFORMATION SOURCES OF THE CRAFTS BUYER

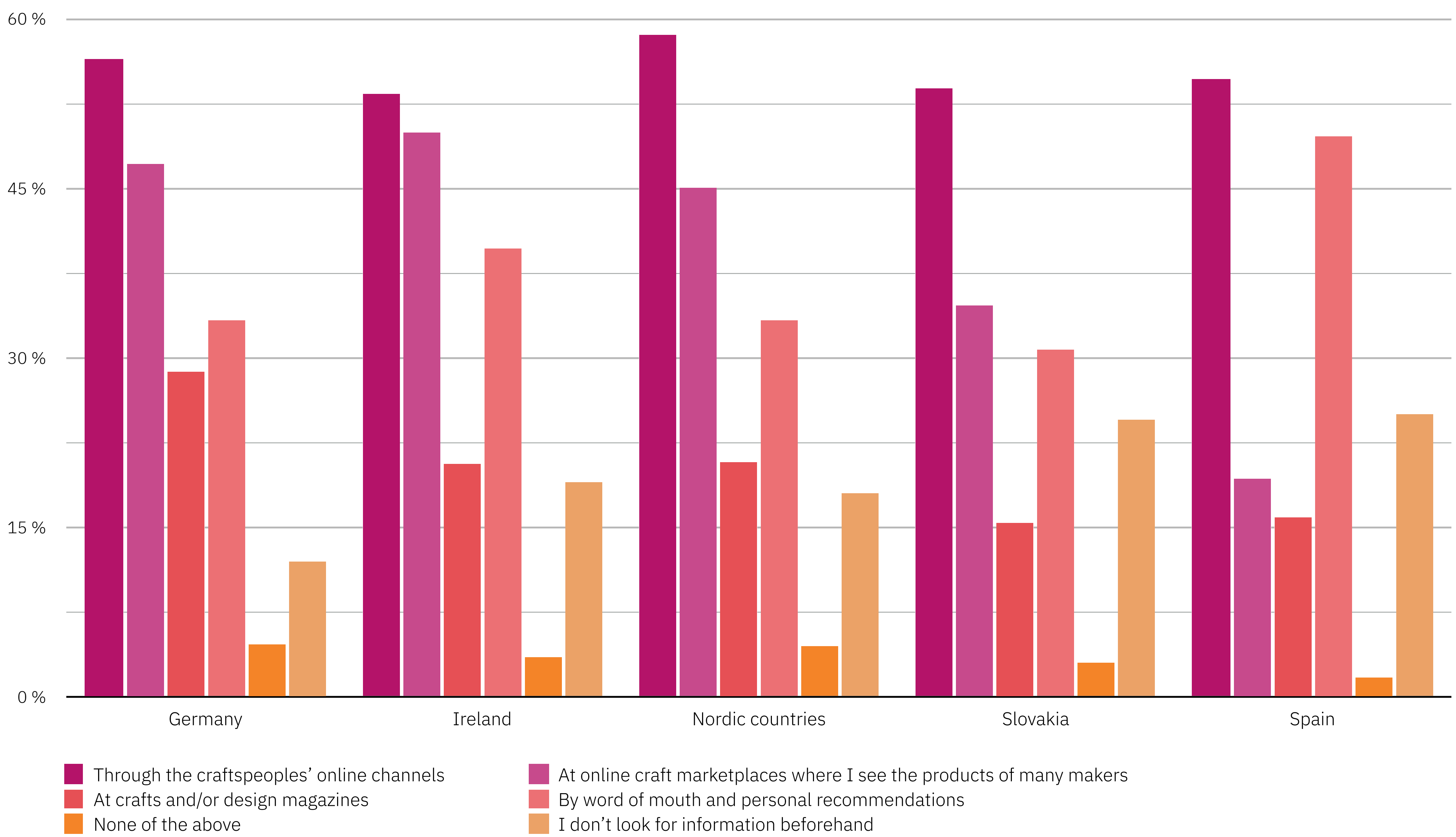
Every person when deciding wether to buy or not to buy, or which item to buy, will be processing information to arrive at a decision. Some buyers look for information consciously, some others prefer to rely just on their intuition, desires and previous experience. If the craftsperson knows the information sources and needs of the buyer, it is possible to develop a strategy to cover the customer expectation on this. When asked about where do they look for information when they want to buy crafts, most of the respondents answered "Through the craftspeoples' online channels (Web, Instagram, Facebook ...)" with 56 % of the buyers selecting that option, followed relatively far behind by "At online craft marketplaces where I see the products of many makers" (38%), and "By word of mouth and personal recommendations" (37%).



Graph 13. Percentages of answers to the question "Where do you look for information when you want to buy crafts?"

INFORMATION SOURCES OF THE CRAFTS BUYER

When comparing the answers from every country/region we observe that there are some slight differences in the preferences of sources of information depending on the country. However, the main one and preferred in all regions is the craftspeoples' online channels. In Ireland the second most mentioned source is "the online craft marketplaces". And in Spain the word of mouth still an important source of information.



Graph 14. Percentages of answers to the question "Where do you look for information when you want to buy crafts?" By country/region

WHAT INFORMATION DO BUYERS' REQUEST IN ORDER TO MAKE A DECISION ACCORDING TO CRAFTSPEOPLE AND EXPERTS

According to the responses of the craftspeople and experts, the main information that consumers request when making a decision includes details on the materials, the production process, and the origin of the product. They also find that the price is also a crucial factor for most buyers, and that some may be interested in personalization options and guidance in choosing materials. The story behind the product and the maker is also important, especially for art-based pieces. They also find that consumers inquire about sustainability, ethical production practices, and the longevity of the product.

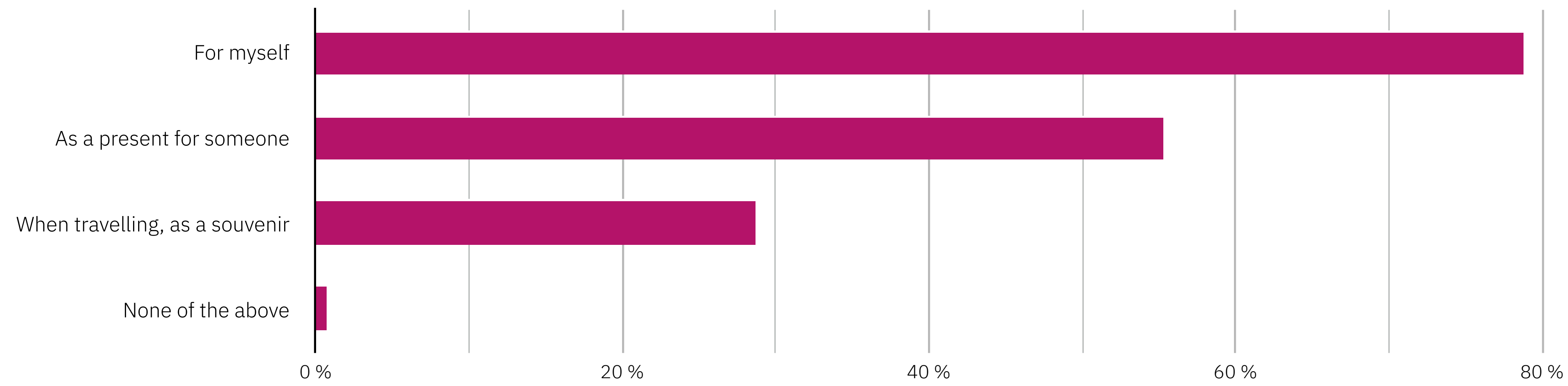
"The consumer is interested in the process involved in making the item - how is it made? But also there are inquiries about the material composition as well as the measurements. The story-telling is still important and adds value to the piece."
Iben Høj, Textile Designer and Artist (Denmark)

"I think they want to know what is the vision and what are the values of the company. They also want to know about what they are buying (how it is made, the materials, the process, etc.). From my point of view, the storytelling behind a product has become very important, so they need to communicate very well what is behind what they are selling."
Silvia Martín, EOI Foundation-Fundesarte manager (Spain)

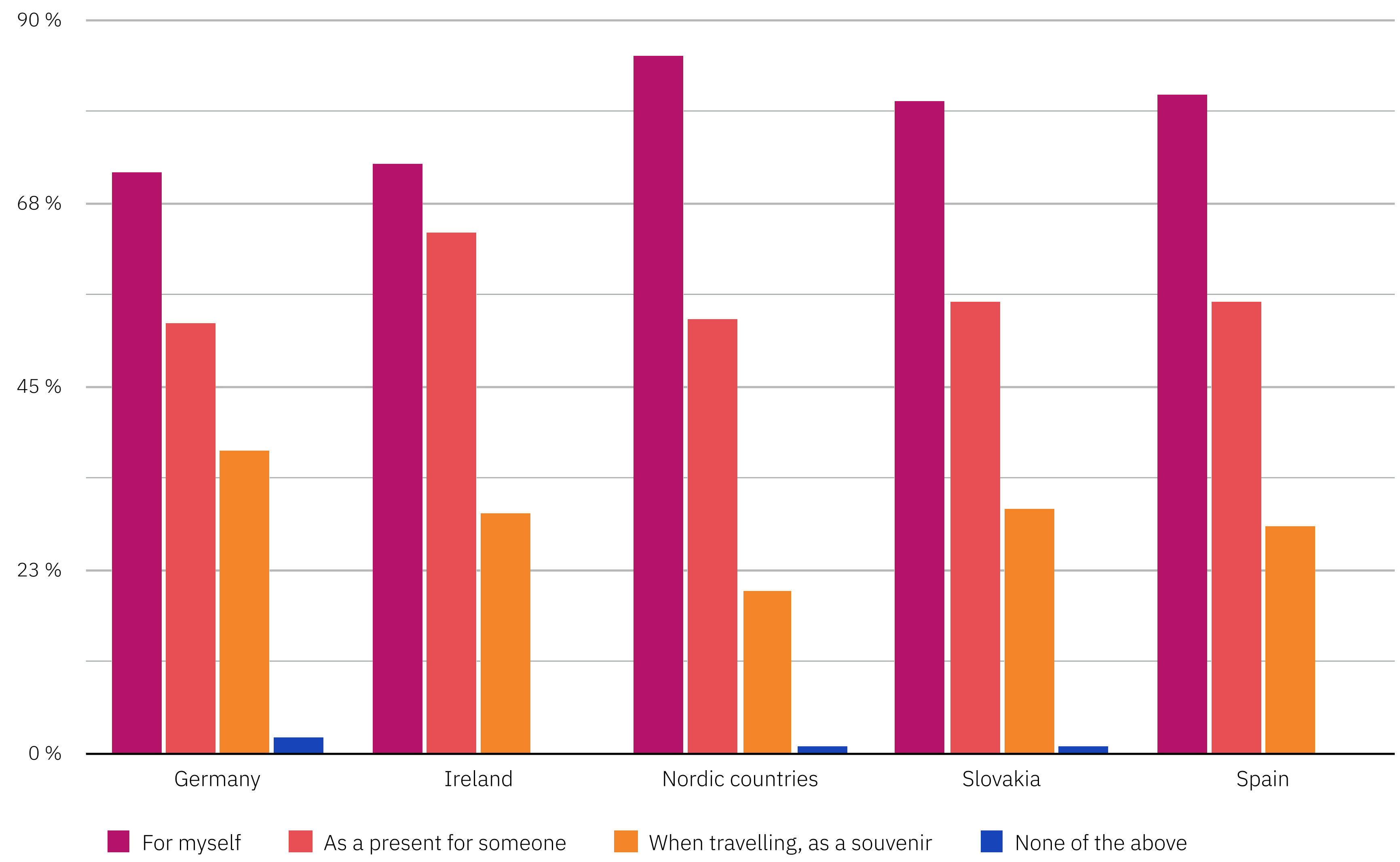
"Confirmation for the quality of materials used, particularly for jewellery with precious components. Otherwise, if the piece is more art based, they are interested in the story behind the formation - the ideas, concepts and techniques used to make the piece."
Michael Hofmeyer, MHGOLD. Goldsmith, jewellery designer and maker of jewellery (Australian living in Italy)

BUYING OCCASIONS FOR CRAFTS

It was also asked in the survey about the occasion of the craft purchase with the aim of finding out the purpose of the buy. 79% of the respondents answered "For myself", 55% "As a present for someone" and 29% "When travelling, to have something from that place (as a souvenir)". The importance of every occasion for the different countries surveyed follow the same pattern without any significant difference.



Graph 15. Percentages of answers to the question "On which occasion did you buy crafts?"



Graph 16. Percentages of answers to the question "On which occasion did you buy crafts?" By country/region

01/ 03

Why do they buy

Knowing the motivations behind consumers' purchases is critical for several reasons:

1. **To improve product development:** Understanding what motivates consumers to buy can help craftspeople develop better products that match their needs and desires.
2. **Targeted marketing:** If businesses know what motivates consumers to buy crafts, they can develop targeted marketing strategies that resonate with those motivations. This can help increase the effectiveness of advertising and promotions and improve sales.
3. **Building customer loyalty:** To build stronger relationships with them by providing products and services that are tailored to their needs and desires.
4. **To develop competitive advantages:** It helps businesses stay ahead of their competitors by developing products and marketing strategies that differentiate them from others.
5. **Improved customer satisfaction:** If craftspeople understand what motivates their customers to buy, they can better meet their expectations, leading to higher levels of customer satisfaction and loyalty.

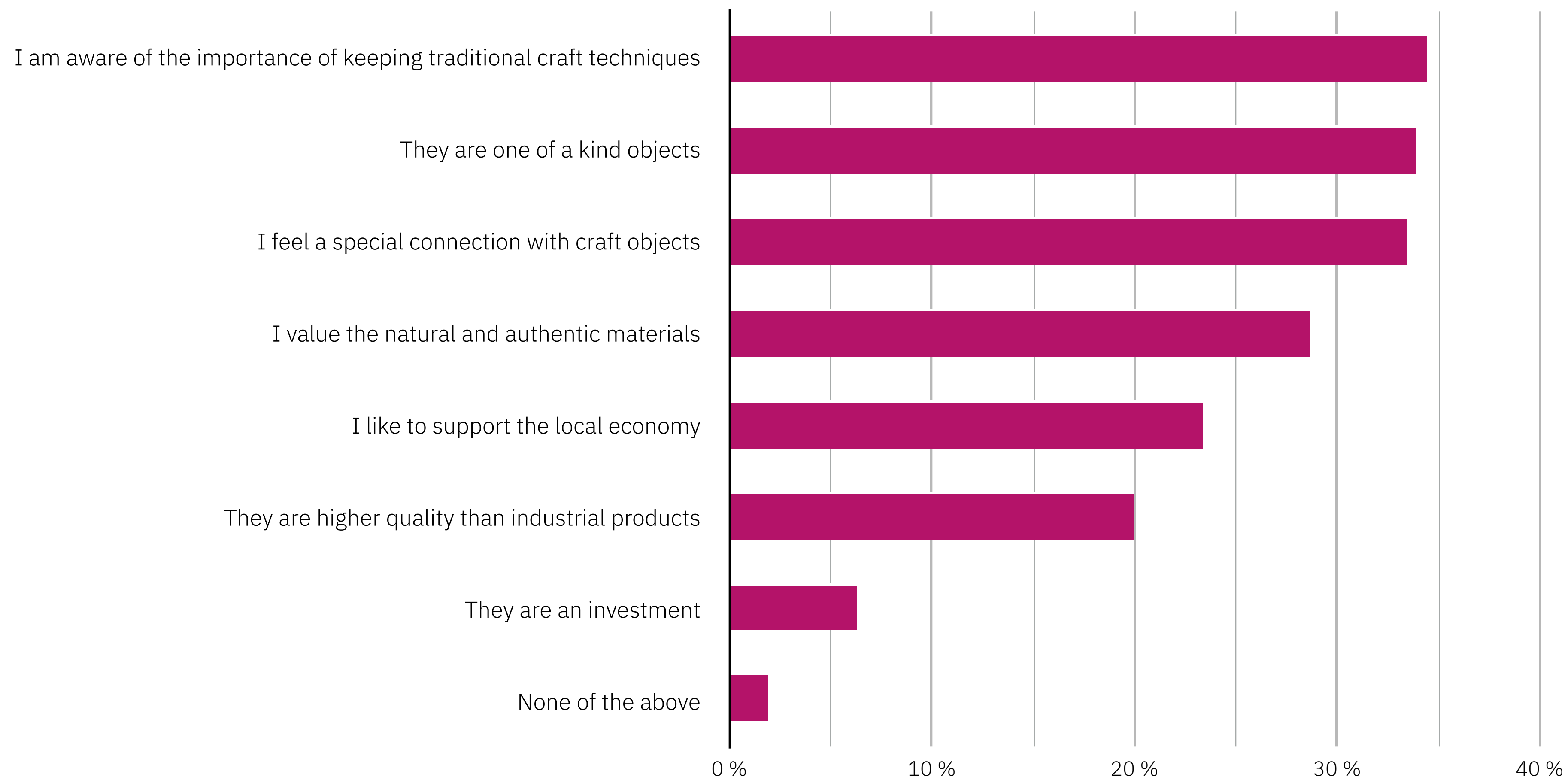
In summary, understanding the motivations behind the purchases is crucial for craft businesses to develop effective product development, marketing, and customer relationship strategies.

Img.: Liana Mika © via Unsplash

The options explored in the survey had different orientations, they were:

1. **I am aware of the importance of keeping traditional craft techniques.** In this case it was oriented to find the weight of tradition and heritage when buying crafts, and the commitment to supporting its survival.
2. **They are one of a kind objects.** The aim was to study the importance of individuality and self expression through unique and non standardised items.
3. **I feel a special connection with craft objects.** A motivation of identification and incorporation of the crafted object to oneself or as an important part of daily life.
4. **I value the natural and authentic materials.** Focusing on the importance and attractiveness of materials.
5. **I like to support the local economy.** To find out how important is for the buyer to contribute to their local communities.
6. **They are higher quality than industrial products.** To assess to which degree a perception of better quality, compared to standardised mass-produced objects, may drive the purchase.
7. **They are an investment.** To measure the motivation of buyers to collect crafts.

The most mentioned motivations for buying were "I am aware of the importance of keeping traditional craft techniques" and "They are one of a kind objects". 34% of the buyers of craft answered that these were reasons to buy. The third motivation is "I feel a special connection with craft objects" (33%), followed by "I value the natural and authentic materials" (29 %), "I like to support the local economy" (23%), "They are higher quality than industrial products" (20%), and finally "They are an investment" (6%).

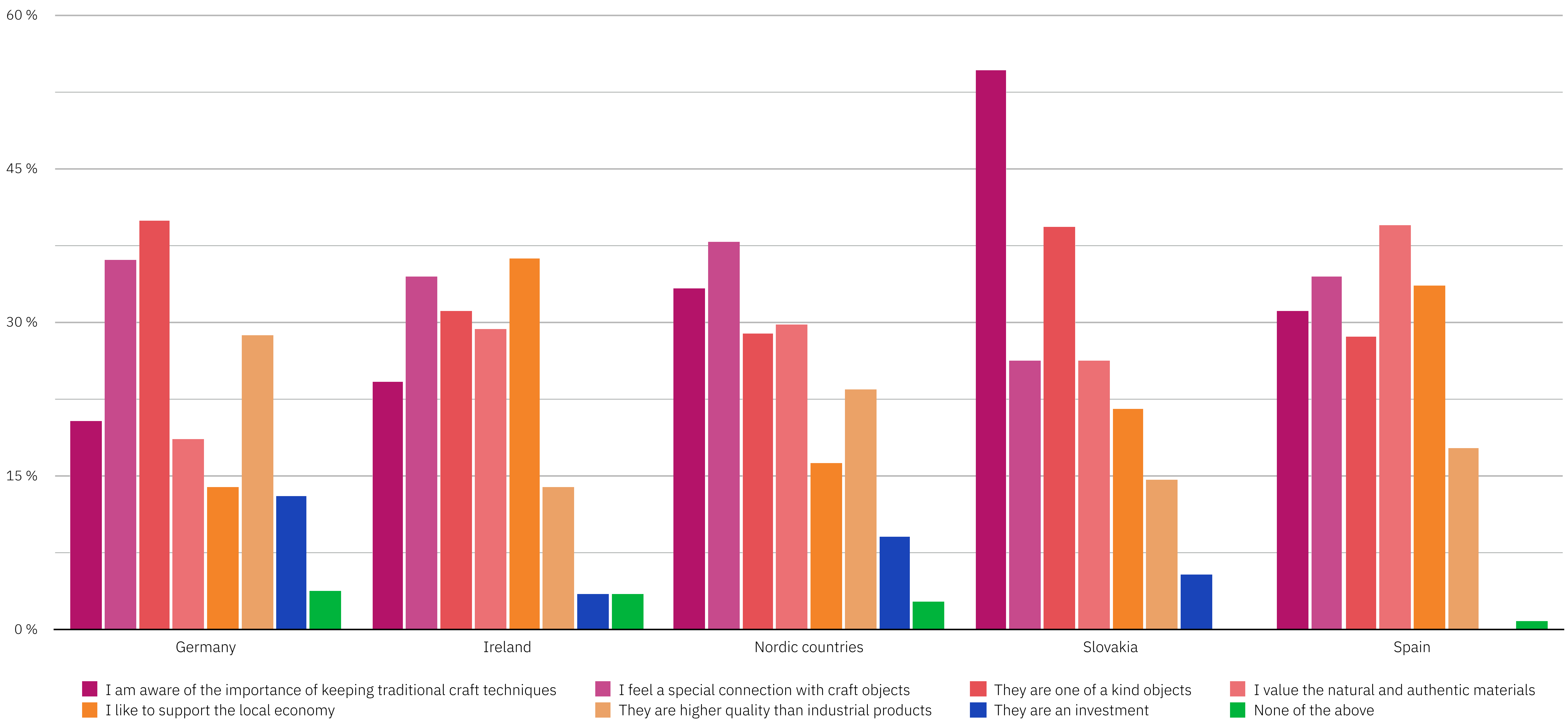


Graph 17. Percentages of answers to the question "I buy crafts because ...".

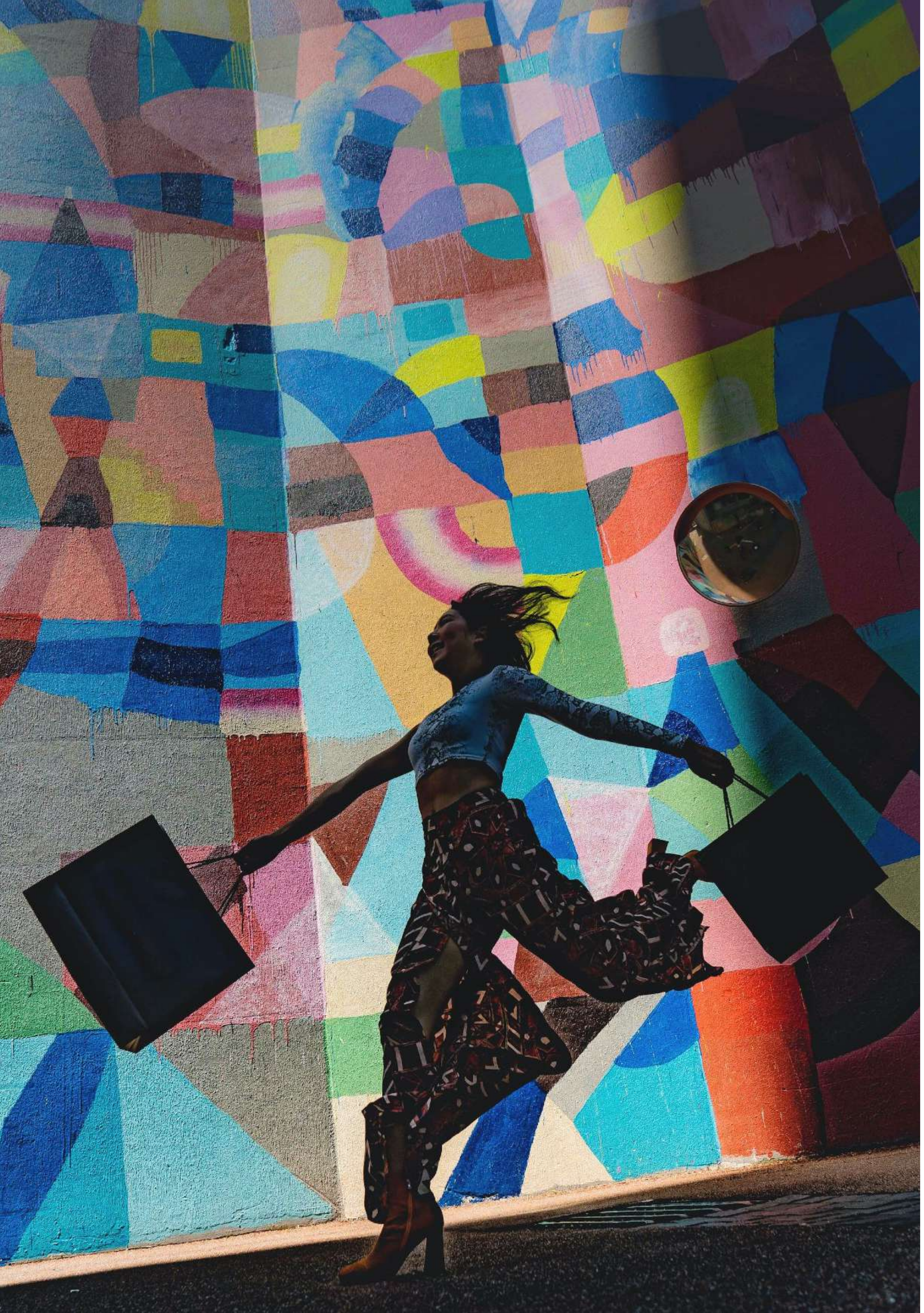
Motivations vary depending on the country/region and it is worth to have a look at these differences when thinking about regions or markets within Europe:

- **In Germany** the most mentioned motivation is "They are one of a kind objects" (40%), followed close by "I feel a special connection with craft objects" (36%).
- **In Ireland** the two most mentioned drivers are the awareness of crafts as a mean for economy in communities: "I like to support the local economy"(36%) and the symbolic identification with the object: "I feel a special connection with craft objects"(34%).
- **In the Nordic countries,** the first answer is "I feel a special connection with craft objects"(38%), followed by "I am aware of the importance of keeping traditional craft techniques" (33%).
- **In Slovakia** the main reason is tradition and the motivation of keeping techniques and help the traditional crafts thrive: "I am aware of the importance of keeping traditional craft techniques" (55%) - a notably strong percentage. The second one is "They are one of a kind objects" (39%).
- **In Spain** the main motivation is "I value the natural and authentic materials" (39%). The next two drivers are at an equal rate, being: "I feel a special connection with craft objects"(34%), followed by "I like to support the local economy" (34%).

Crafts as investments are more present among the respondents in Germany (13%) and the Nordic countries (9%).



Graph 18. Percentages of answers to the question "I buy crafts because ..." By country/region



01/ 04

The craft consumer universes of the future

“Consumer universes”* is a term used in trends research. These sketch the profiles of a future citizen-buyer that has already incorporated the new social, cultural and political paradigms of their time. They are the embodiment of a trend. A consumption universe profiles a cast of future buyers each according to their values and motivations. How do they live? How do they eat, dress, buy or spend their time? How do they relate to the crafted product?

To talk about trends in craft can be controversial as very often is related to tradition. However, craft it is not exempt from the influence of shifts in social and economic structures, lifestyles, etc.

Img.: Harry Cunningham © via Unsplash

The following pages contain five "consumer universes". A description of these worlds and characters favours our understanding and empathy when connecting with them. Does our product fit with those lifestyles? Can our brand credibly offer something new to a particular universe thus representing a credible business opportunity? Bearing them in mind also guides the design process of a new product, the redesign of the existing one and even the communication, since referents are used for each universe. Thanks to these descriptions we can think more clearly how our offer fits into different lifestyles, hence the importance of knowing them in all its facets.

To better understand them, we will illustrate the descriptive arguments of each universe with "lighthouse cases". A "lighthouse case" illustrates a trend and is a probe or its existence. It practically represents a trend, as there is a product, business or business model that responds to the motivations and lifestyles of that particular current and universe.

This information is treated more in depth in the additional report "The New Consumer of Crafts for 2025. Exploring future for crafts", developed **by Otō**, the Trends Observatory of Ohayō, for the European Crafts Alliance. Otō has monitored this and other industries for a decade. The insights presented aim to be a useful tool for craftspeople and crafts related professionals who may need help to navigate changes and find direction in our evolving world. The European Market for Crafts study wouldn't be complete if we don't show how the consumers are changing and what's behind those decisions. Thanks to the continuous monitoring of trends developed by Ohayō through its observatory Otō, we can now present theories and cases that depict new social and cultural movements that affect lifestyles and their relation to crafts.

Img.: Harry Cunningham © via Unsplash

EMERGING CONSUMER UNIVERSES 2025

A consumption universe profiles a cast of future buyers each according to their values and motivations. How do they live? How do they eat, dress, buy or spend their time? How do they relate to the crafted product? They are the embodiment of a trend.

1. Beautechnologists
   They award importance to health and beauty

2. Survivors
   One of the most austere, creative and decisive universes

3. Updaters
   They evoque the past and have renewed interest for their own and other's traditions

4. Essentialists
   In search for freedom, happiness and peace of mind through the simplification of their lifestyles

5. Ecolovers
   Aware of the effect of consumption in their environment

1. Beautechnologists

They conform to a universe that is very aware of the importance of health and beauty. They believe they have the power to win the battle against time and that technology can help them in that mission. They arise from the democratisation of information and, therefore, from access to knowledge about health and well-being, and from awareness about the expansion of life expectancy. Thus they take care of the body as a form of leisure where health is the domain of the individual, extending beyond the doctor's office. In fact, for them health is in many other places: hotels, wellness centres, spas, retreat sites, specialised stores, etc. They assume that health is visible, and that it is linked to appearance and therefore being healthy makes you more beautiful and vice versa. This is how well-being and aesthetics come together, mix and even become confused. Some of its most extreme manifestations are movements such as *Biohacking* or *Transhumanism*.

1. In food

Function first.

2. At home

They don't mind to sacrifice the symbolic side of objects if, in return, they obtain functionalities to take care of their health, improve their wellbeing and their connectivity at home.

3. In fashion

Main precursors of the smart garments and sport wear.

4. In leisure

They will spend their time taking care of themselves.

5. In retail

They expect from brands the maximum integration between online and offline markets.

6. In communication

Use messages or images that evoke sensations as a metaphor for what the product offers. Show the interaction between person and object, user and technology.

BEAUTECHNOLOGIST & CRAFTS

This universe is prone to build interiors at home with furniture made of materials which stand out due to their properties for wellbeing. Also in fashion they can look for clothes and accessories made of specialised functional fabrics (natural or artificial). Crafted products will be especially interesting to them if they can be customised to their needs, if they help to have a healthier life. Due to their relation to technology, they might be the fondest of 3D printed products or application of technology to crafted products.

LIGHTHOUSE CASE

Sybilla for Cerabella

Out of this collaboration of the designer Sybilla with the craft candle producer Cerabella, a set of six candles have been designed. Candle and candleholder become one. Their shapes draw sinuous movements generating a perfect harmony with a soft, smooth texture and a natural tone that conveys a placid warmth.

Candles and scents, so linked to Nordic wellness and happiness concepts such as "Hygge" or "Koselig" are an important item at a Beautechnologists' home. These philosophies have been exported worldwide and with them the taste for candles at home.

Img.: Cerabella ©

2. Survivors

Is one of the most austere universes. Usually, those that have just become independent correspond to this group. They are born bargain hunters and are well aware of the importance of the value they get based on the price they pay. This doesn't mean that they always look for the cheapest, but that they are going to consciously value what they receive for what they give. Survivors are aware of their limitations but not for that reason unhappy. They are creative and decisive, they value resources and take care of them. The Survivors give importance to the objects that surround them and have the ability to find a second use, to give a second chance to what others would discard. Movements such as FIRE (Financial Independence, Retire Early), very popular among Millennials, Do it Yourself (DIY), and everything related to Arts & Crafts belong to this profile. They try to create and personalise their environment, which sometimes emerges from necessity, but in other cases it arises as a life philosophy of financial independence.

1. In food

Their shopping cart is basic and and a large part of their food consumption happens at home.

2. At home

Colourful, functional and effective interior. Lots of plants, repurposed and versatile furniture.

3. In fashion

Fans of basics and customization.

4. In leisure

Creative. The more, the merrier. Low cost travelling and home parties.

5. In retail

Experts in hard discount stores. They don't mind to do part of the job of the retailer if that makes the product cheaper.

6. In communication

Use messages about the savings in money, energy, space and effort.

SURVIVORS & CRAFTS

They value the creativity and versatility of products, which is why they like crafted products aligned with philosophies of reusing, recycling or up-cycling. And they also see crafts as a good way to support the local economy and the small craftspeople. They themselves use crafts as an income source. It is good to remind the Survivor that crafts are a great option for gift giving occasions. Furthermore it is good to highlight to them the beauty of working with the hands with limited resources and without wasting materials for the creation of unique objects.

LIGHTHOUSE CASE

Patio High Back, by Studio Bertjan Pot for Weltevree

Dutch designer Bertjan Pot created the "Patio Set" for Weltevree. Pot enjoys products that are made with only one technique and one material, just like nature does. Wooden slats or slats are a material widely used in outdoor furniture, and in the design of the Patio Set they have been used not only as a seating surface but also for the structure of the furniture, and as an enveloping screen that provides shelter and privacy. The main condition for Weltevree's commission was to create outdoor seats without adding foam. In this way you avoid having to be dragging cushions when setting the furniture in the garden. Only a blanket is enough to provide warmth and softness to the seat. The product is reduced to the basics, the resources used for it are optimised to the maximum. Each of the versions makes it clear that there is no waste and that everything is designed to fulfil its function without further additions.

Img. 1: "Patio High Back". Studio Bertian Pot ©

3. Updaters

This is a universe that evokes the past and presents a renewed interest in one's own traditions and as well as those of others. They look for ways of life, aesthetics and consumption labelled as traditional. They are moved by authenticity and nostalgia. The Updater intends to recover the identity of the territory. There is a desire to make tradition contemporary and return to the local product. For them, the real exclusivity and luxury is the crafted product made by hand, or those where the producer has a high level of personal involvement. Their consumption is evocative and they enjoy reliving experiences linked to their childhood. It is, some how, a reaction against globalisation, and therefore a revaluation of the artisan against the industrial, of the identity against the standardised. Updaters have discovered the value of handmade work and the importance of preserving techniques and trades, and they carry out a mature consumption that takes all of this into account.

1. In food

Old flavours, recipes and ingredients with often an innovative twist.

2. At home

Warm, natural and never standard. Furniture and objects have a high symbolic value.

3. In fashion

Tradition revisited. Reinterpretations of prints, finishes, fabrics or designs of traditional clothing merged into current designs. The process and the material is specifically important.

4. In leisure

The Updater is not the type of traveller who looks for a hotel chain to stay in. They want to feel a sense of belonging wherever they travel to.

5. In retail

The physical store is the place to learn about the product and the production process.

6. In communication

It is best to use images and messages that unveil the essence of the product or service. Display the value of the purchase as a long term investment.

UPDATERS & CRAFTS

It is the closest universe to the most traditional culture of crafts, or at least to the most widespread idea of what crafts are. As lovers of everything made by hands, they will be willing to invest in objects that embody the heritage and knowledge of the craftsperson. The crafted product is looked for everywhere: old staple recipes, artisan packaging, natural materials, furniture that reinterprets classics or redesigns traditional pieces adapted to contemporary uses, fashion that incorporates elements of traditional manufacturing, regional costumes, ... They will enjoy buying, using or experiencing products and services that connect them with the territory, the local customs and traditions. The opportunities are widely spread and can be found in all facets of a person's life and consumption. Why not a concept store specialised in well-curated crafted products?

LIGHTHOUSE CASE



Le Zucche di Terracota by Antonio Aricò

Terracota pumpkins are an ode to his connection to traditions and craft. Aricò has added certain elements to pumpkins turning them into *Magna Graecia's* amphoras. A ring, two handles and a base provide character and relevance to this humble fruit. Halloween's icon dresses up as a classic Italian-Greek object. Antonio Aricò is an artist, designer and creative director from Calabria who combines art, craft and design together with contemporary culture, creating an interdisciplinary practice. He is well known for equating craft and self production with industrial design.

Img. 1 - 3: Le Zucche di Terracotta. Aricó for Elle Decor Italia. A. Muscatello ©

4. Essentialists

It is a universe in search of freedom, happiness and peace by simplifying its lifestyle. Derived from the post-global financial crisis sentiment and aware of its effects, together with environmental concern and high levels of personal indebtedness, among others, the Essentialist universe develops a refined lifestyle based on the essentials. They work intensely to get rid of useless or unnecessary stuff. They buy less and better, and for them each object has a great symbolic value, since they have made an effort to choose what they want to live with. They are motivated by leading a socially responsible and sustainable lifestyle. They connect particularly well with the philosophy of craft, where the object has a deep and multilayered dimension of meanings beyond the functional or the aesthetic.

1. In food

Good basic, practical and high-quality products, often organic.

2. At home

At their highest extreme, they are fans of tiny houses, modular houses and even portable homes. The light and simple home full of meaning. The haiku house.

3. In fashion

Prone to uniform style.

4. In leisure

Rest and contemplation. Looking for simple plans that allow them to enjoy peace of mind and reconnect with themselves.

5. In retail

They prefer stores that sell quality, durable, well-designed products without unnecessary additions.

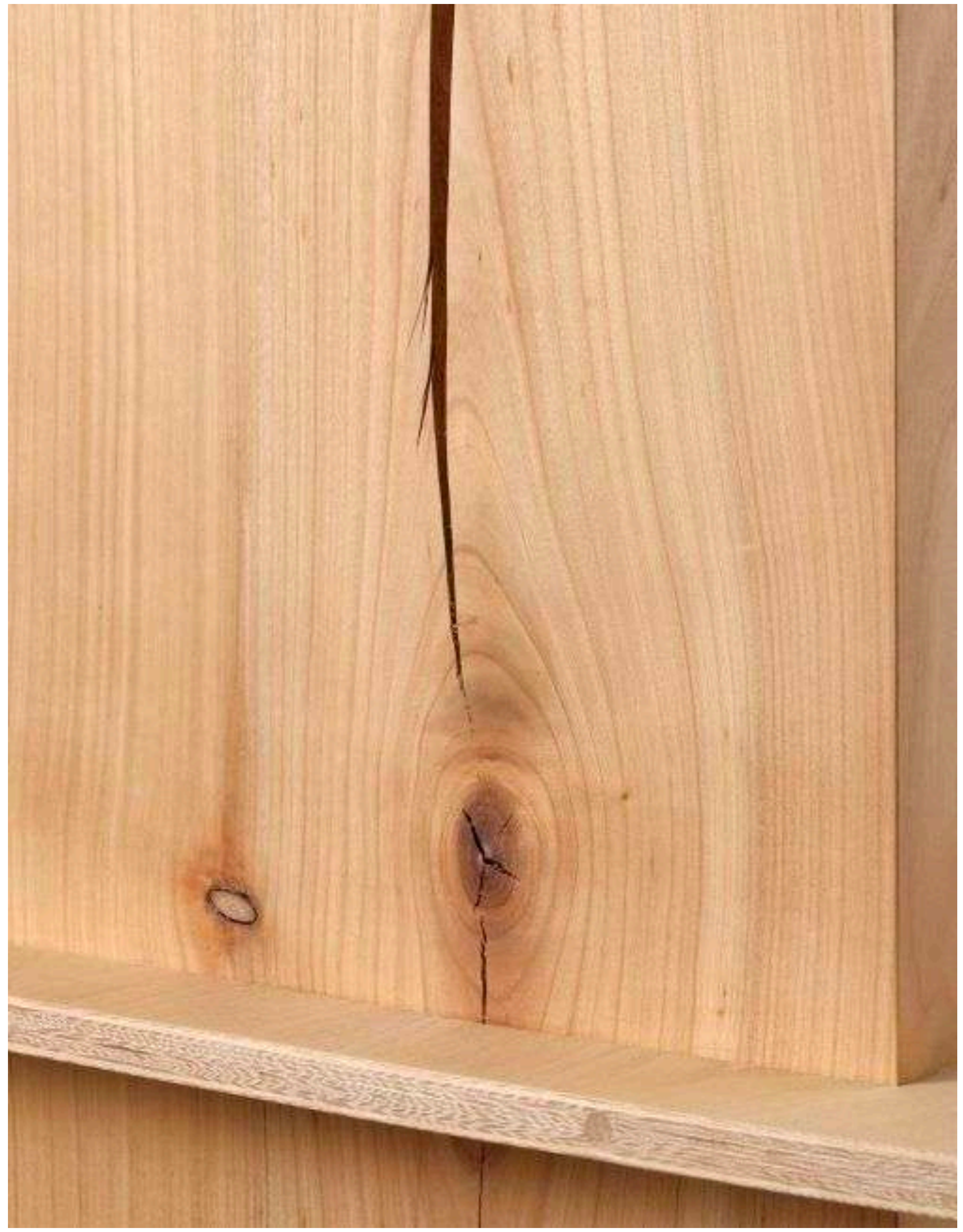
6. In communication

Back to basics. The store itself as a communication channel. Specialised design and lifestyle magazines. Direct visual messages.

ESSENTIALISTS & CRAFTS

They value simplicity and durability. Discreetly designed crafted products for the home and good quality fashion garments with good finishes will match this universe. Objects that facilitate order, that have a refined and clean aesthetic, with personality but without being too invasive in the home environment fit in with this lifestyle. You can think of them for kitchenware, home textiles, storage furniture, well-made chairs or tables with durable materials, clothing in practical fabrics that are easy to combine and clean or simple fashion accessories with character.

LIGHTHOUSE CASE



Anne Brandhøj. Bend to Caress Me chair

Bend to Caress Me is a piece by Danish designer Anne Brandhøj that puts the spotlight on the duality between raw wood and the finished, polished wood used in fine furniture. The result is an object with function but with a sculpted soul. Here we have the hybrid moment of art, design and craftsmanship that defies being labelled.

Img. 1-3: Bend to Caress. Anders Sune Berg ©

5. Ecolovers

It is the universe more aware of the effect of consumption on its environment. They see sustainable choices as a way to take care of their health and the planet's. This universe has many variations and different motivations for consuming in an eco-friendly and responsible manner. They seek authenticity, not necessarily in traditional methods, but in products made without synthetic additives. Sustainability is one of their driving forces, but not the only one. Health and community are also very important to them. They value local products as a factor of trust. They like to feel they are part of the solution to environmental problems.

1. In food

The origin of the ingredients, their nutritional characteristics and the impact of their production process are especially important.

2. At home

Large investors in energy efficiency systems and clean environments.

3. In fashion

Reusing, the search for natural fibres (linen, hemp, wool, organic cotton) and materials that come from waste are the key.

4. In leisure

Great organisers of home parties, outdoor picnics, meetings to do community works.

5. In retail

Charities and second hand stores. Organic supermarkets and activist retailers and brands fans.

6. In communication

Transparence and commitment. Purpose driven. To focus on the transforming power of responsible consumption.

ECOLOVERS & CRAFTS

For them, crafts are a form of sustainability. Thus, they will value the craft processes that improve the passive conditions of homes (roofs, walls, fabrics, finishes,...), products made with recovered materials, crafts that promote areas of ecological value or that help maintain sustainable and endangered lifestyles. Consumption is not such a bad thing for them if they feel they are supporting craftspeople. The Ecolover emphasises the power of crafts to maintain trades, to support population in rural areas and to help develop more sustainable ways of producing objects.

LIGHTHOUSE CASE

Sastres Paperers

In the Molí de la Farga, an old public mill with more than 330 years of history, Sastres Paperers make paper. They have manufactured plantable paper for the ecological merchandising company Sheedo Studio, and for events and campaigns for brands such as Hendricks Gin, Inditex-Massimo Dutti, Warner Bros. etc. Sastres Paperers is a project with a social and cultural vocation that combines the production of quality hand made paper under the AQUARI PAPER brand (for artists, creators and graphic communication) with the dissemination of the trade through school workshops, workshops, etc. AQUARI PAPER is sold in the main fine art stores in Europe and its papers fly around the most unexpected corners of the world.

Img. 1: Plantable paper for Hendricks. SastresPaperers ©

Img. 2: Plantable paper for Maximo Dutti. SastresPaperers ©

LIGHTHOUSE CASE

Sastres Paperers

Img.: Molí de la Farga. Sastres Paperers ©

Img.:"Primates" Vases Collection. Madrillus. Elena Salmistraro ©

Value proposition of crafts for the emerging consumption universes

The motivations for consuming handicrafts can be very different depending on the beliefs, desires and lifestyles of the individual. Thus, we present a set of propositions that link the craft, the brand story and some of the driving forces of behaviour for each emerging consumption universe. To think of the future user of the product can be a revolutionary gesture for many workshops that over time have been trapped by inertia. These concepts and action lines are just a sample of what trends insights can offer to update or find new ways to improve the craft business.

	BEUTECHNOLOGISTS	SURVIVORS	UPDATERS	ESENCIALISTAS	ECOLOVERS
Global challenges. To be part of the solution, not part of the problem		Brands help you to follow your conscious, frugal but fun lifestyle			Craft brand with a cause
Supporting sustainable economies		Craft for recycling, saving and reducing the use of resources			
Source of inspiration: helping to fulfill the challenges	To gain quality of life and health through the craft product			Brands select the essential basic items. They look for the greatest minimum feasible version of the product	To help to carry out a more responsible use of resources and consumption
Wellbeing and health orientation	Benefits of craft's materials for health			Simplification to improve life. Brands find the joy in silence. They promulgue the absence of superfluous features	
No remorse luxury			Luxury as a long term vision based on heritage and wisdom of the craftsperson, the value of the materials and the 'slow' and careful production process.		
Reinvention of traditions		To have fun as in the old times. Traditions are a way of leisure	Origin is a source of happiness	Updating and revisiting to improve the design of crafts	

02

Market characterisation and size in 2022

The analysis and description of the European market for crafts offers an image of the dynamics of a complex sector. Crafts are intertwined with many other key industries of the European economy such as tourism, leisure, hospitality as well as with design driven industries such as interior design, product design, fashion and luxury.

The analysis has been started with a quick review of the sector in a sampling of European countries. Some of the countries have been defined by organisations based on the knowledge of their associates. The different national approaches to crafts are a probe of the difficulty to characterise the whole sector at a transnational level.

Through a characterisation and assessment of the European market for crafts we hereby present compelling evidences on the size, nature and prospects of this sector to serve as a call to action to governments and institutions in charge of energising the economy and taking advantage of the market trends as a medium to improve the quality of life of its citizens and the projection of the brand Europe to the world.

02/ 01

A quick review of the craft sector in European countries

The European market for crafts is fragmented and non-uniform. The content of "crafts" and the availability of data in every country varies hugely. History and the economic structure of the countries have influenced the development of their craft sector. Through a quick review of the situation in 5 different countries it is possible to feel how urgent is to come to a minimum agreement on what is considered to be craft, and start harmonising the collection of information in Europe.

Img.: Denys Striyeshyn © via Unsplash

IRELAND

In August 2021 the Design & Crafts Council Ireland published Grant Thornton's report into the "Economic Impact Assessment of the Design and Crafts Sector of Ireland", identifying "a series of key findings which show the sector to be vibrant, productive and delivering wider economic and social impacts across Ireland." The Irish Craft and Design-Intensive sectors generated € 2.9 billion in Gross Value Added (GVA) in 2019. The last time that this indicator was measured, in 2012, its value was €1.4 billion, which means a growth of 111% in 7 years.

Between 2012 and 2019 the number of enterprises engaged in Design-Intensive and Craft activities rose 6.6% to over 18,000. And 105,000 people was employed in this sector, a number equivalent to the information and communication sector in the same country (107,256). In this report it was highlighted how Craft and Design support a wide foodprint of other businesses in Ireland. It was estimated that the total economic contribution of the sector increased to €3.6 billion in 2021 from €2.3 billion in 2020. The study identified that craftspeople and designers are highly qualified in the country, with 22% of craft employees and 42% of design-intensive enterprise employees having received at least a degree classification. It reflects how those engaged are remaining in formal education for longer, the interest in education related to these sectors corresponds to increased opportunities and a growing expectation amongst employers for employees to be educated to this level.

Img. Quentin Rey © via Unsplash

FINLAND

In the absence of any governmental statistical data on the crafts economy in Finland, in order to gain some insight into the region we count on the information provided by the Finnish Association of Designers Ornamo. They number 523 crafts makers and artists in their organisation. The presence of family tradition in the business is mostly relevant in Sámi* traditional crafts. Some of the crafts present in this country are: Ceramics, glass, textiles, metal (including jewellery and iron works), woodworking crafts, paper crafts and recycled materials crafts. Most of the businesses are micro companies, from 1 to 2 people maximum employed.

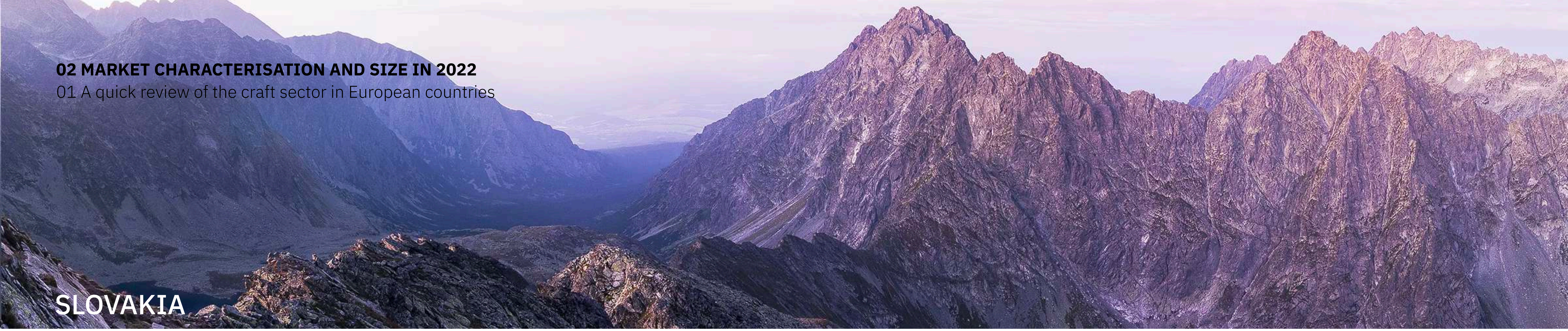
*Indigenous people who live in Norway, Sweden, Finland and Russia.

Img. Vincent Guth © via Unsplash

NORWAY

For a glimpse into Norway, which also has no clear statistical data, we count on the vision of Norske Kunsthåndverkere (NK) – Norwegian Association for Arts and Crafts. NK is an artist organisation. A requirement for being admitted is to be a professional artist with a higher education in visual arts (or an artistic level equivalent to this). This particular approach started with some crucial strategic choices made during the artists protests in the mid-seventies in Norway. The craft artists decided to define themselves as visual artists, not artisans, and they created the NK, thus gaining access to a whole ecosystem of artists’ grants, public art commissions, remuneration schemes, etc., which were developed from the mid-seventies onwards. The consequence is that NK currently does not represent nor have knowledge of the crafts sector in Norway as a whole. They count on records and information about the professional material-based artists within ceramics, glass, textile, wood, metal/jewellery and some other fields. Nevertheless, as they consist of 925 ordinary members (student members not included), they have knowledge on an important part of the professional craftspeople of their country. The overwhelming majority of them are a single person company. The exception are the glass artists who run a hot glass kiln, who may have between 1 to 3 employees. The largest categories that Norwegian craft artists belong to (in this order): Textile art, Ceramic, art, Metal/jewellery, Glass art and Wood sculpture. Many choose to work with several materials or disciplines interchangeably, and some experiment with non-traditional materials.

Img. Michael Fousert © via Unsplash



SLOVAKIA

The review of Slovakia has been provided by the Centre for Folk Art Production ÚĽUV, an organisation whose mission is to safeguard and develop traditional crafts and home-made production in Slovakia. In this country, there are no statistics about crafts at a national level. The recognition of traditional craftspeople as cultural professionals only just happened in 2021. Currently, as of 2023, a new law is being drafted by the Ministry of Culture.

The historical collapse of the communist regime in 1989 is directly related to a lack of information. Until 1989, almost all traditional craftspeople were covered as employees in the planned economy by the ÚĽUV. Traditional craftsmanship was sidelined between 1948 and 1989, people were unable to make a living from traditional crafts, they were employed in state-owned enterprises, and for those that persisted, craftsmanship remained only as a secondary source of living. The craftspeople produced products commissioned and distributed by the state. In fact, between 1948 and 1989, self-employment was banned, and as a result, most craft businesses and all trades disappeared. The country's crafts sector is still struggling to recover from this historical decimation of the private sector. The repercussions are still felt today. After 1989, they were able to start their own business. However, as the planned economy ceased, the system collapsed and it became very difficult to make a living solely from craftsmanship. Even after the collapse of the regime, many of the domestically planned craft enterprises were not revived. People did not return to craft and there was a generational loss. At the time most of the products were priced according to the purchase power of average consumer and design products made up only a small part of the production. In recent years, there has been a more clear interest by the state (probably as a result of European developments in this sector) in formalising activities in the cultural and creative industries. For the third year, the Slovak Business Agency, a state organisation, is running a national project in which prospective entrepreneurs, as well as established entrepreneurs, can receive training in economics, taxes and marketing. Nevertheless, there is still quite a lot of work to do to ensure the feasibility of craft as a way to make a living for young people, as well as making the sector attractive. In the last two years ÚĽUV has been trying to dialogue with actors in the Slovak regions and also with partners abroad so that the promotion of crafts in Slovakia become systematic. Due to this history, craft enterprises in Slovakia are young, as they only started to emerge after the regime change in 1989. ÚĽUV's estimation of the average age of craft enterprises is 5-6 years.

Img. Štefan Štefančík © via Unsplash

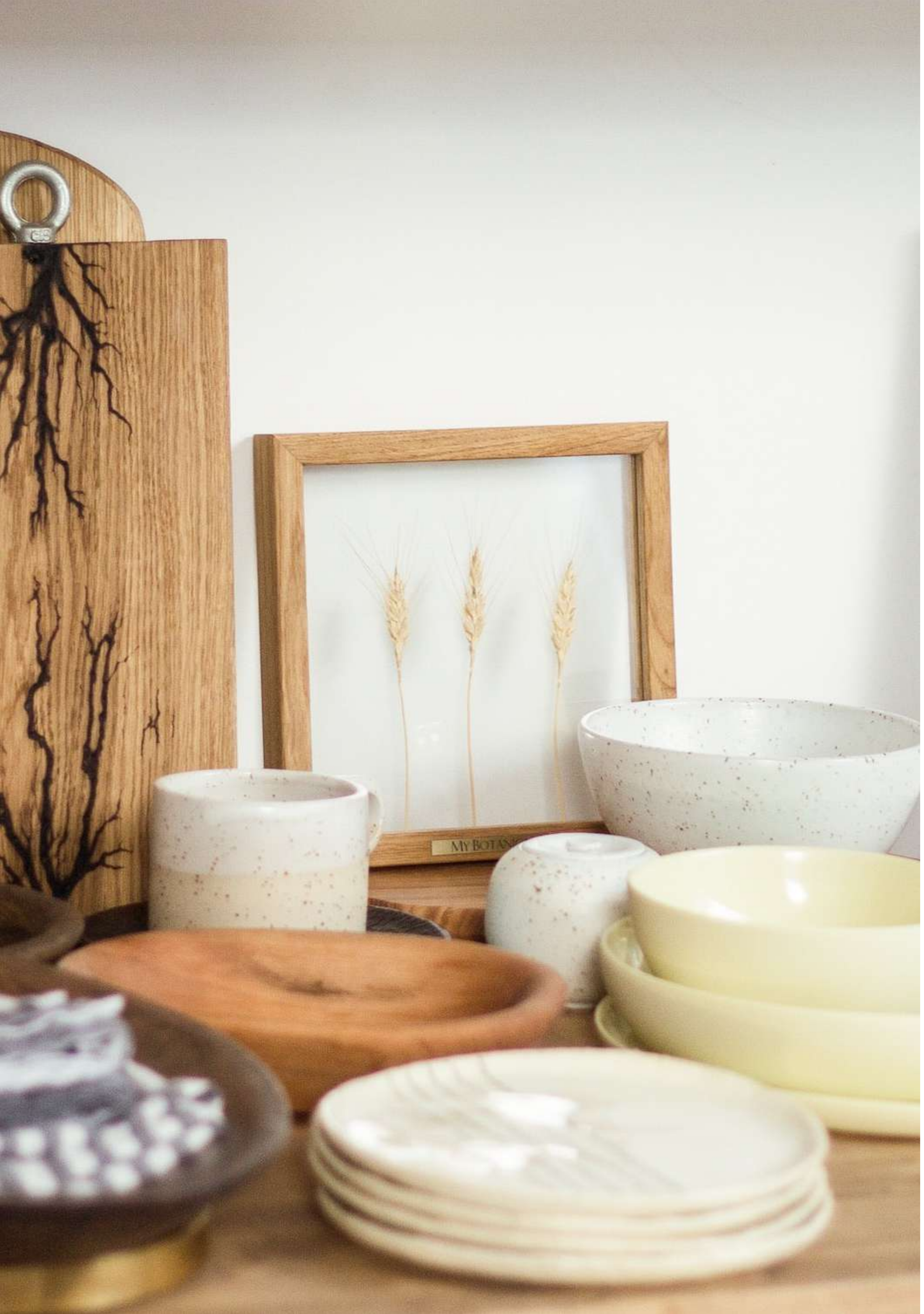
SPAIN

Two studies provide insight into the crafts in Spain. In 2015 EOI Foundation-Fundesarte (Spain's government body for the promotion of craft) published the study "Situation of Crafts in Spain. Report on Competitiveness and main economic indicators", a research carried out by Abay Analistas Económicos. More recently, in Septembre 2022 Círculo Fortuny (a non-profit Spanish association created to promote cultural and creative luxury brands in Spain) released the research commissioned to KPMG titled "Craftsmanship in Spain. Hallmark of high-end products", focused on luxury crafts.

In the first source it is said that the Spanish crafts sector identified in 2014 some 38,577 enterprises. 70% of them were a one-person business and 30% consisted of limited enterprises, cooperative organisations and non profit organisations. Regarding the number of employees, 97.4% of the enterprises were microbusinesses with less than 10 people employed. It is estimated that crafts businesses employment was 124,979 people at that time, making up about 4,3% of the industrial employment. The Gross National Product for crafts in 2014 reached €4 billion. The main subsectors were wood furniture crafts, textiles and jewellery.

In the second more recent study, the numbers include the food & beverage industry, which may distort the findings. KPMG estimates that crafts in Spain in 2019 reached €6 billion, 46% belonged to the food & beverage industry, 13% to non metallic mineral (ceramics, glass ...), a 11% to wood, cork crafts and natural fibres crafts, a 9 % to furniture manufacturing, and a 7% to textiles crafts. They count 64,000 crafts enterprises and 213,000 people employed in the sector.

Img. Francisco Moreno © via Unsplash



02/ 02

Average expenditure on crafts

In a previous section it was studied through interviews of people during the last 12 months the frequency of purchase and the expenditure in crafts. In that analysis we have included the buyers that have spent from 30€ to 3.000€ in that period. Based on that information, the resulting annual average expense per buyer is 346€. Moreover, 36% spent 100€ or less, 21% among 101€ and 200€, 28% among 301€ and 600€, and only an accumulated 15% had spent more than 600€. As it is described in the methodology section, the profile of our respondents is composed of individuals that purchase for personal reasons. The survey does not include professional buyers of crafts or contractors.

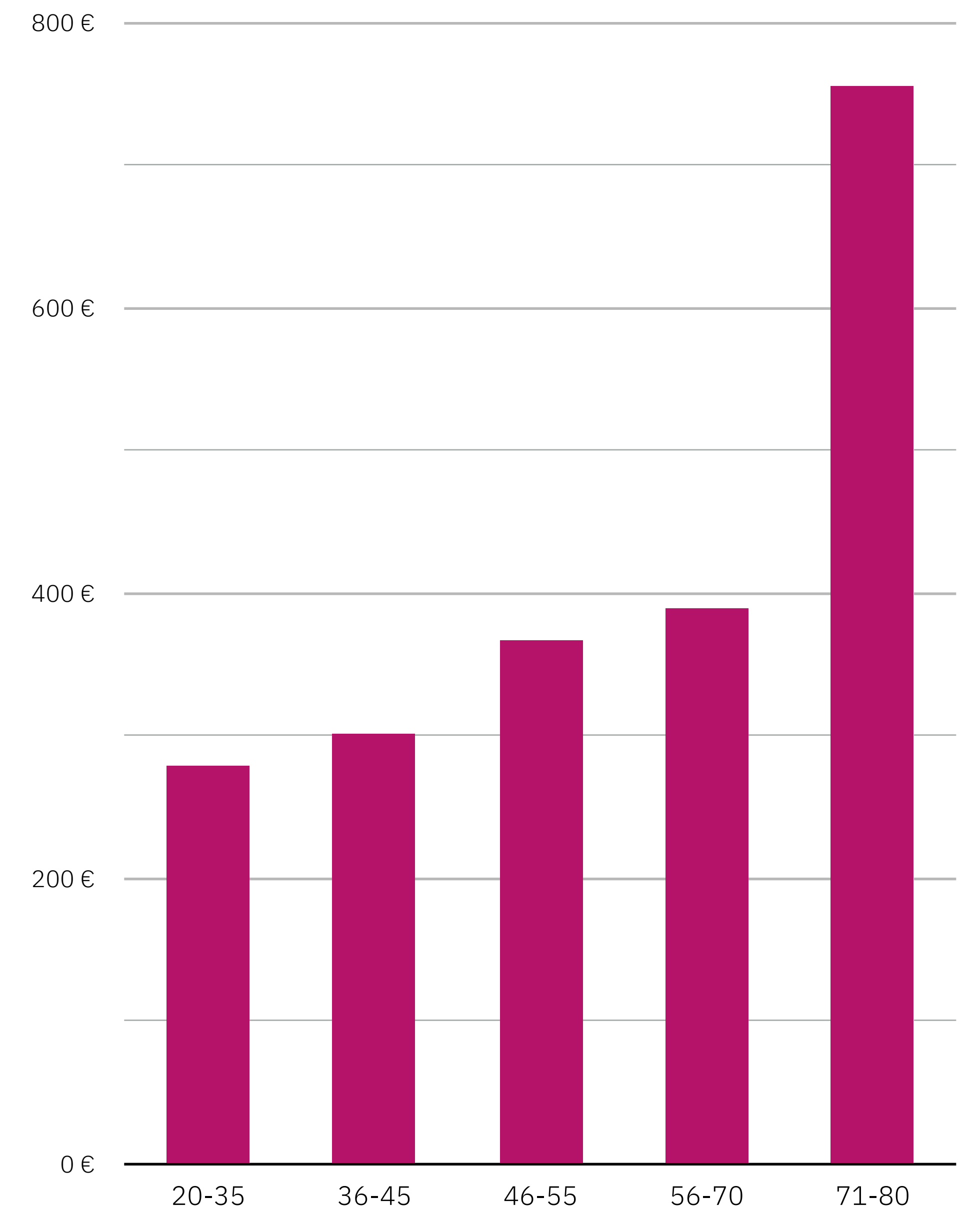
Now we will study the average expenditure in more detail, diving into the nature of that expense and the difference among regions and profiles. This analysis will help us to learn more about the expenditure on crafts of European citizens. It also serves as a basis to estimate the size of the crafts market in Europe.

Img.: Vladimir Gladkov © via Unsplash

If we analyse the annual average expenditure by age, we find averages such as 279€ for buyers between 20-35 years old, 302€ for buyers between 36-45 years old, 367€ for consumers between 46-55 years old and 389€ for buyers between 56 -70 years old.

AGE RANGE	AVERAGE EXPENDITURE	% OF THE SAMPLE
20-35	279 €	27 %
36-45	302 €	21 %
46-55	367 €	23 %
56-70	389 €	26 %
71-80	756 €	3 %
+ 81	390 €	0 %

Table 5. Average annual expenditure in crafts by age and composition of the sample

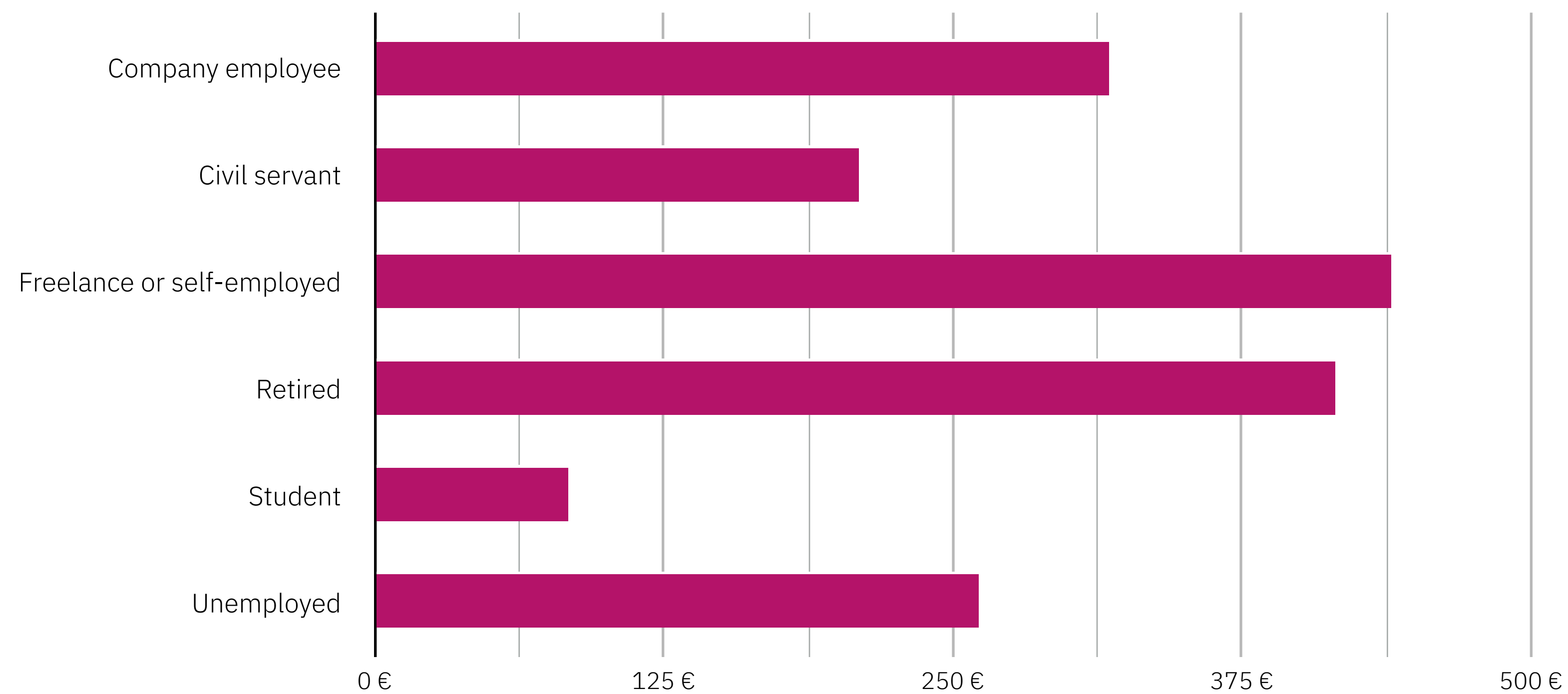


Graph 19. Average annual expenditure in crafts by age

According to the occupation, there is a higher expenditure among freelancers or self-employed buyers, with an average annual expenditure of 440€. Retired buyers come in with an average of 415€, followed by company employees. The sample size for the categories of "students and unemployed" was so small, 1% and 4 %, that the data gathered should be taken lightly as both were under represented as a group.

OCCUPATION	AVERAGE EXPENDITURE	% OF THE SAMPLE
Company employee	318 €	44 %
Civil servant	209 €	11 %
Freelance or self-employed	440 €	27 %
Retired	415 €	13 %
Student	84 €	1 %
Unemployed	261 €	4 %

Table 6. Average annual expenditure in crafts by age and % of the sample

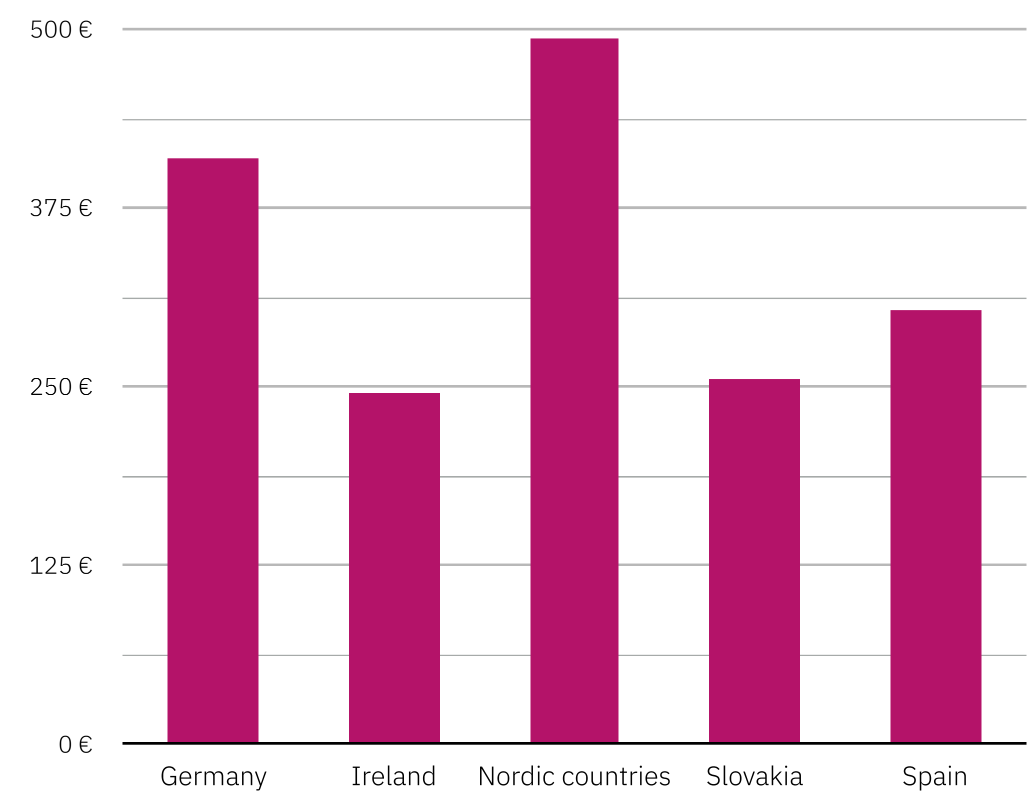


Graph 20. Average annual expenditure in crafts by occupation

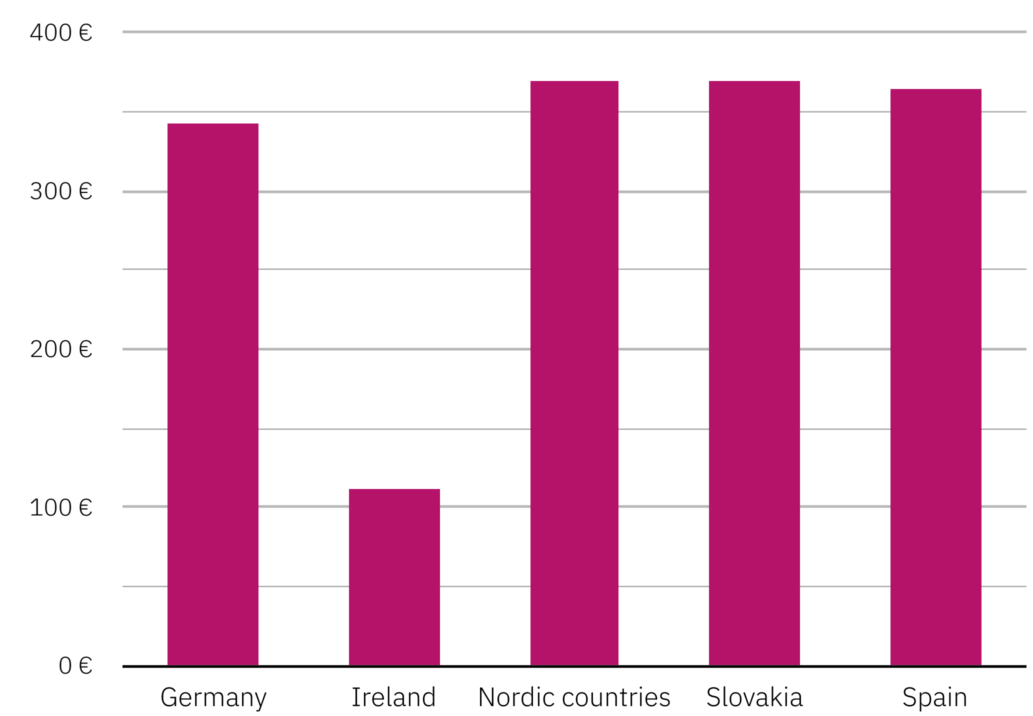
It has been also studied to find if there are substantial differences among the surveyed countries. In absolute terms we find the averages in the table and graph below. If we leverage the per capita income of every country by applying the Eurostat 2021 GDP per capita index*, we will be able to compare the annual average expenditure in the different countries disregarding the differences in their income per capita.

COUNTRY/REGION	AVERAGE EXPENDITURE	GDP PER CAPITA INDEXES (EU=100)*	ADJUSTED AVERAGE EXPENDITURE
Germany	410 €	120	342 €
Ireland	245 €	219	112 €
Nordic countries	493 €	134	369 €
Slovakia	255 €	69	370 €
Spain	303 €	83	365 €

Table 7. Average annual expenditure in crafts by occupation in relation to the GDP per capita index



Graph 21. Average annual expenditure by country/region in absolute terms



Graph 22. Adjusted annual average expenditure in relation to the GDP per capita index

02/ 03
The size of the European market for crafts

Thanks to the survey conducted valuable information has been obtained in order to estimate the size of the European market for crafts and then to calculate the serviceable available market (SAM) in value. To do such calculation:

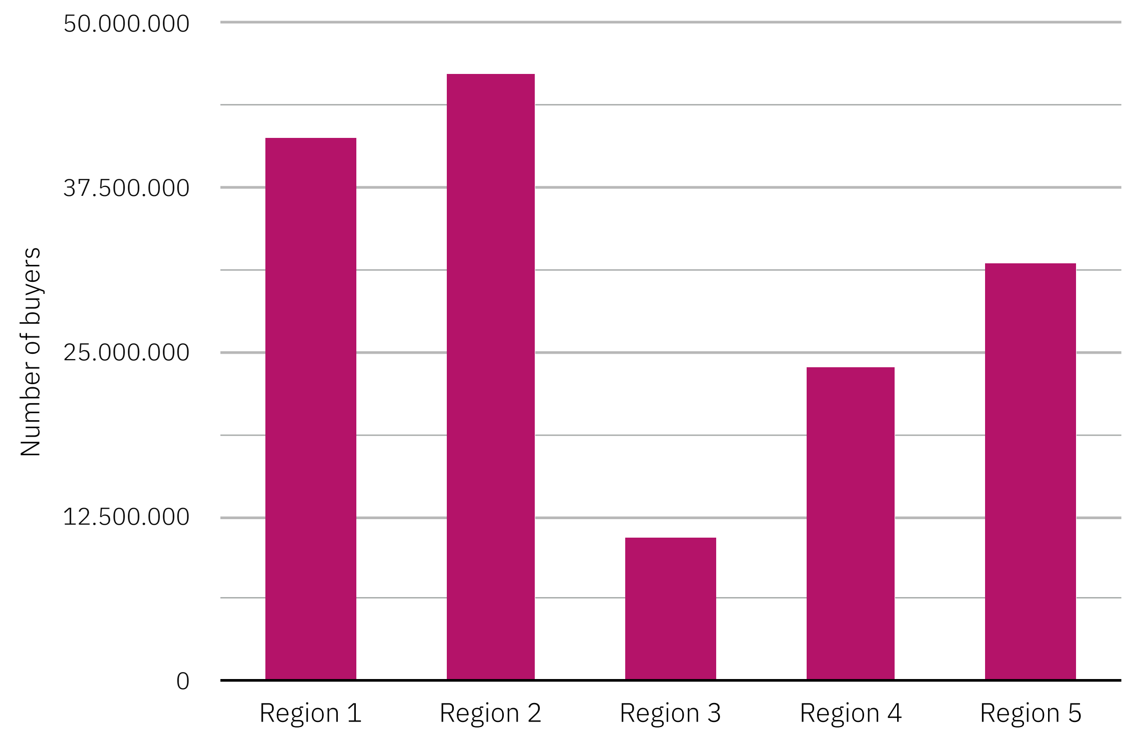
1. **A set of 5 European countries** has been surveyed and that information has then been extrapolated to represent 5 European areas. R1: Central and northern European countries, R2: South European countries, R3: Upper north Europe countries, R4: Europe islands' countries (excluding Iceland), R5: East European countries. For this purpose it has been consider the EU-27 plus Norway, Iceland and the United Kingdom as addressable markets.
2. **It has been defined a potential penetration index** (as a part of the total potential market). Using this index it has been determined the total addressable market for European crafts.
3. **The value of the European market for crafts** has been estimated using the the average expenditure on crafts as discovered by the surveyed individuals.

For every surveyed country the population (as per Eurostat) of the number of citizens aged 20-70 has been extrapolated to represent the "population" of the same age demographic of the regions at large.

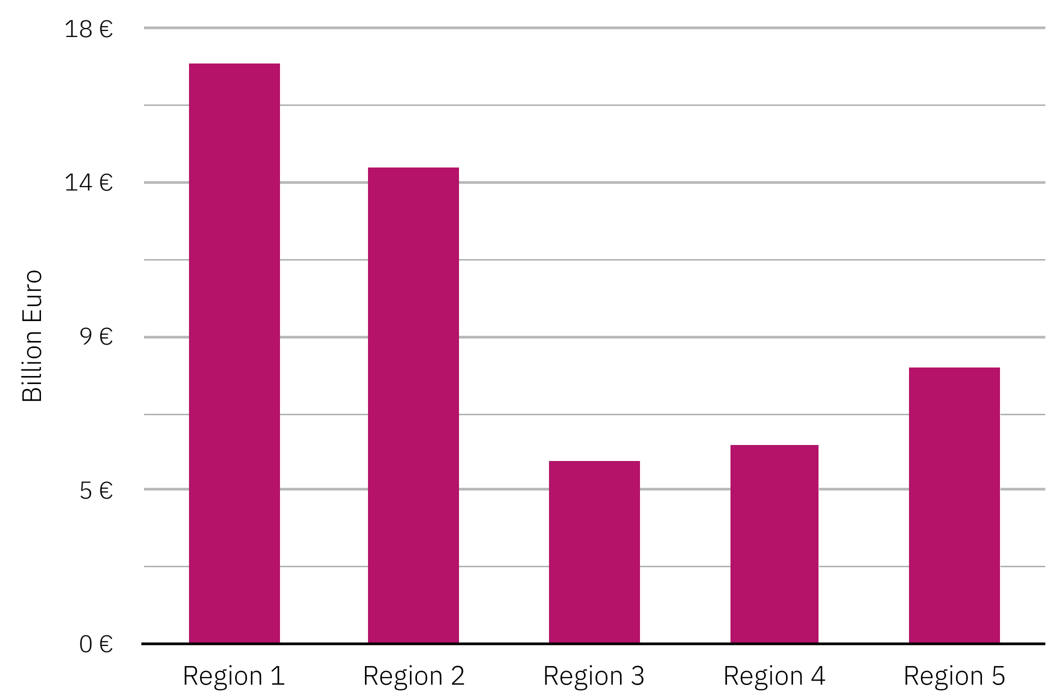
Img.: Janco Ferliic © via Unsplash

According to the results of this study approximately 85% of this demographic were buyers of craft goods. This percentage extrapolated out to represent the regions in their entirety give us the potential size of the market in number of buyers across Europe (Total Addressable Market: TAM), which would be 256 million buyers. Applying the annual average expenditure per person found in the survey for each region, the estimation of the total value of the market is 83,6 billion euros.

Taking a cautious approach, and leveraging the data to include factors such as the fact that not all the potential market in Europe will be served by European craftsmakers, the modest size of the sample for each country and the error in the extrapolation, it has been calculated the serviceable available market size (SMA) as a portion of the total addressable market mentioned above. The serviceable available market size would be 153 million buyers and would have a value of 50 billion euros, if we consider it a 60% of the TAM (hypothesis 1). If we consider the SMA a 75% of the TAM (hypothesis 2), it would result in 192 million buyers and a value of 62,7 billion euros.



Graph 23. Estimated serviceable available market size in number of buyers by region



Graph 24. Estimated serviceable available market value (billion of €) by region

Region 1: France, Germany, Austria, Belgium, Luxembourg, Netherlands
Region 2: Spain, Portugal, Italy, Greece, Malta, Cyprus, Croatia, Slovenia
Region 3: Denmark, Sweden, Norway, Finland, Iceland, Lithuania, Latvia, Estonia
Region 4: Ireland, United Kingdom
Region 5: Slovakia, Czechia, Poland, Hungary, Bulgaria, Romania

02/ 04

Competitive environment

Competitive environment involves elements such as the competitive rivalry or competition intensity, the threat of having new entrants in the business, the power of buyers, the power of suppliers, and the influence of substitute products. In the craft sector in particular there are issues such as the entrance of new non-professional craftspeople to the market, who are using crafts as an alternative source of income. There is also the competition of handmade products from markets where the rules and regulations are far laxer than in Europe. Rising costs in materials and energy also effect the competitive environment.

Img.: Markus Winkler © via Unsplash

STRENGTHS OF THE EUROPEAN CRAFTS

Threats are tackled by activating strengths. Based on the responses from the experts and craftspeople, it can be concluded that the European crafts sector's main strengths are its coexisting tradition and innovation, the historical link with the particular territories and its culture, and its individual and experimental attitude towards craft-making. European crafts are also highly valued for their long-standing savoir-faire, cultural identity, beauty, and quality. The sector is highly diverse, with a rich tradition of techniques, access to high quality raw materials, and a remarkable offer or exquisitely crafted products. It has made significant progress in incorporating design and new trends and integrating into other sectors such as tourism and culture. Craft has also shown significant adaptability to change due to its agile business structure, production flexibility, and success selling internationally. European crafts are exclusive and highly individualised, making them unique and expressive. Despite differences among the interviewed from different countries, the preservation of traditions, skillfulness, and design are highly valued as an identity signature of European crafts.

WEAKNESSES OF THE EUROPEAN CRAFTS

When asked about the weaknesses of European crats, both experts and craftspeople identify a series of them. One of the main issues is the lack of entrepreneurial skills and a proper business mindset among craftspeople, who often juggle producing and marketing without professional knowledge of the latter. Another concern is the limited capacity of makers to produce due to the small size of their business. Moreover, craftspeople struggle with the high costs for producing and shipping, expensive taxes and the lack of specialised marketing and distribution networks, making it hard for them to compete globally. In addition, craftspeople and crafts experts from some countries have stated that there are inadequate training programs resulting in low visibility of the sector as well as insufficient government investment. There is also a lack of recognition of crafts makers as artists thus exempting them from funding that would seem to go with a prevailing bias towards fine arts in art education. Furthermore, the sector faces challenges such as incorporating the digitalization of their businesses as well as design savvy in their online representation. Lastly, there are concerns about fragmentation, disappearing crafts, lack of business skills, and insufficient differentiation of craft products, which compete with lower quality industrial products. Some craftspeople do not see any weaknesses. Others feel there is a need to step up and communicate the value of craft better.

WEAKNESSES OF THE EUROPEAN CRAFTS

STRENGTHS	WEAKNESSES
Well known tradition and long-standing savoir-faire	Lack of entrepreneurial skills
The existence of highly experienced and skilled crafts masters together with a very creative young generation of makers.	Gap in the training of craftspeople to market their products
Technical excellence	Lack of a settled and specialised distribution network and craft agents
The link to the territory and culture	Limited production capacity
Future looking approach present in many countries, which connects with bold and daring buyers	Fragmentation and atomization, small size of businesses (which makes them vulnerable)
Individual and experimental attitude of craftspeople towards their work	High shipping costs
Diversity	High production costs within Europe
Expressiveness and design	Undervalued image of the crafts maker works in relation to art makers'
Ethical making process	Lack of government involvement and commitment
The overall high quality of materials used in the production of crafts	Rigid tax systems and non appropriate treatment in the VAT system
	Lack of incorporation of design
	Non guaranteed continuation by younger generations of craftspeople

Table 8. Strengths and weaknesses of the crafts sector

LALA DE DIOS, WEAVER, ART HISTORIAN, PRESIDENT OF OFICIO Y ARTE, ORGANIZACIÓN DE ARTESANOS DE ESPAÑA (OAE) (SPAIN).

“I believe European crafts main strengths are tradition (the link with the past, the history) and innovation (meaning creativity and authorship, not necessarily new technologies). What makes European craft special is the same that makes Asian, African, American crafts special: the link with a particular territory and its culture. But I believe that the main strength of European craft is that it is absolutely looking onwards to the future.”

PIOTR JEDRAS, KNIFE MAKER. KLOSY KNIVES (POLAND).

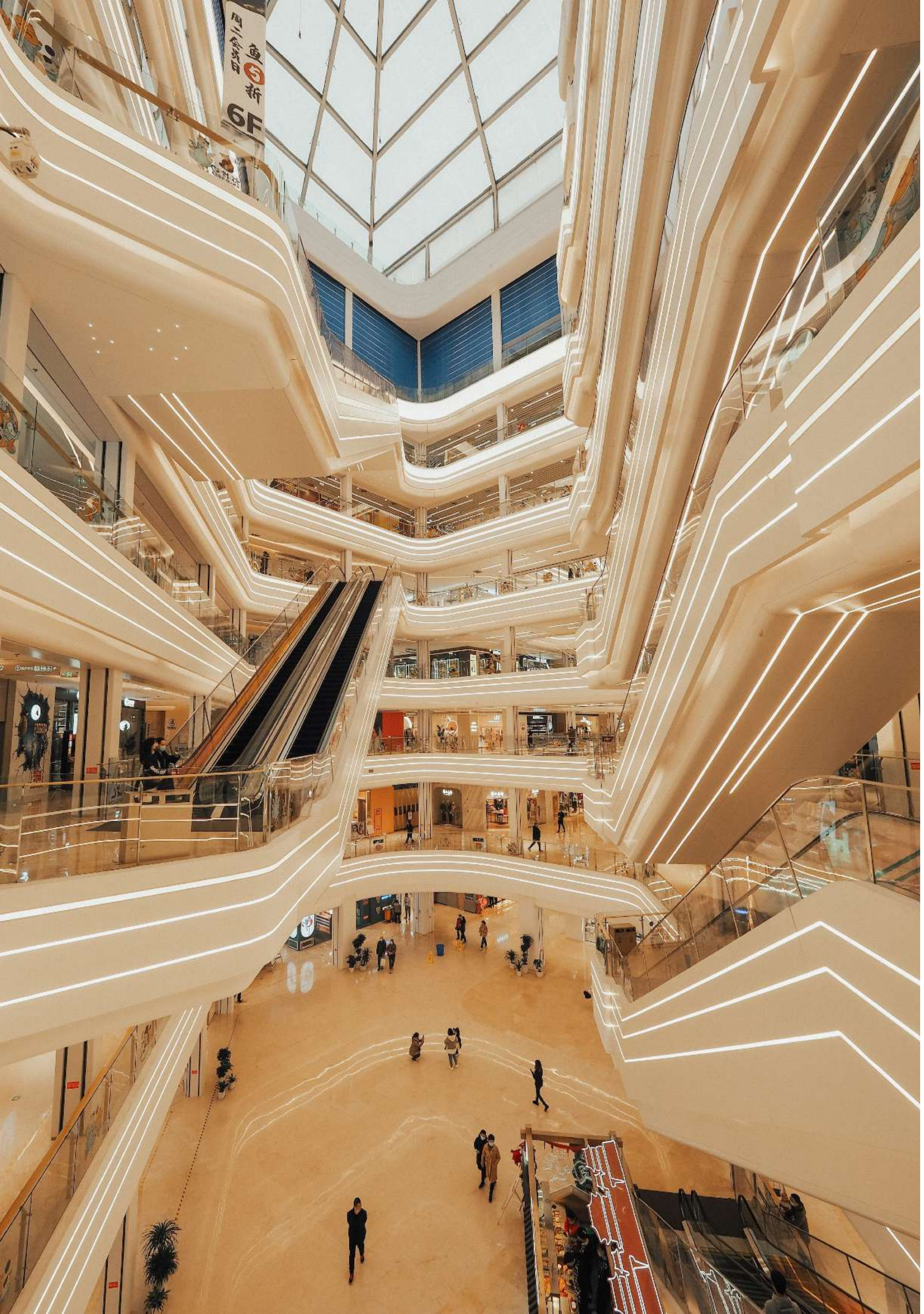
“It's only my view but I think we have an aesthetic cultural base which is very different to the rest of the world, we're 'free' from design approaches built by generations which constrict many makers and make their works less creative. We have an individualistic social philosophy which allows us to look for disruption and novelty in our field.”

PERCEPTION OF CRAFTSPEOPLE AND CRAFTS EXPERTS ABOUT COMPETITIVENESS IN THE SECTOR

There is no clear consensus on whether competition in the craft business has increased or decreased in the last few years. Some of them believe that there has been an increase in competition due to more young people entering the field, while others think that the competition has remained more or less the same. Some of them mentioned that there is a stronger sense of community within the craft industry.

The main disagreement among them is related to the effects of the pandemic on competition, with some suggesting that it has increased due to the rise of amateur start-up workshops and e-commerce, while others suggest that competition has decreased due to fewer opportunities and a lack of education among buyers of the value of well designed, handmade objects. Additionally, there are concerns raised about "dark" competition, such as stealing ideas and designs and selling them as one's own. The diversity of profiles, disciplines, countries and situations here manifest the difficulty to generalise on competitiveness at a European level.

The general agreement with regards to competition is that the craft industry is constantly evolving, and according to the interviewed people, there has been a generational change that has resulted in new young artisans seeking different markets. Some think that competition is healthy for the industry, while others view it as a threat to their business. The impact of global markets and social media was also noted as both an opportunity and a challenge for craft businesses.



02/ 05

Distribution channels for crafts and internationalisation

The nature and orientation of every craft business may lead to very different types of distribution systems and points of purchases. The variety of models is part of the richness of this sector, and also an open gate for craftspeople to find new ways to market their work.

Img.: Jimmy Chang © via Unsplash

From the answers provided by the craftspeople, we can draw the following conclusions regarding how the work reaches the consumer:

1. Specialised shops, galleries, museum shops, and craft centre shops are popular places for selling crafts.
2. Markets, fairs, and special events are also popular channels for marketing crafts.
3. Clients who view craft-based works as contemporary art tend to buy them through contemporary art galleries, emphasising the importance of branding and storytelling.
4. Online shops and social media platforms like Instagram and Facebook are becoming increasingly popular distribution channels for craftspeople to market and sell their work.
5. Personal contact, word of mouth, and physical meetings are crucial for craftspeople selling their work locally.
6. Some craftspeople mainly sell to collectors, while others sell to final consumers, retailers, or through their own online shops.
7. Craftspeople primarily market their work through social media platforms and participate in exhibitions and fairs.
8. Some craftspeople express discomfort in marketing their work and prefer to rely on word of mouth or personal connections.

When asking experts about their perception on changes in the distribution channels, they seem to agree that there has been a shift towards online sales for crafts in the last five years. Many of them mention Instagram and Facebook as increasingly important tools for selling and advertising their work. Some also note the development of apps and online marketplaces as significant changes in the distribution channels for crafts. However, there are some differences in opinion among the experts. Some suggest that there are now more international galleries selling crafts, while others believe that there are fewer specialist shops. Some suggest that there are now more smaller sales formats, while others mention the rise of design concept stores where skilled craftspeople sell their works alongside designers and artists. Generally, while there are some differences in opinion, there is a general consensus that online sales channels have become more important for crafts in the last five years, with social media platforms being particularly significant.

Internationalisation of crafts businesses is also one of the challenges for many craftspeople. Based on their responses, it is clear that many of them do sell abroad, with some experiencing more success in international markets than others. The most common markets cited include European countries, the United States and Japan.

The main barriers and difficulties mentioned for selling abroad include high shipping costs and customs fees, difficulties in finding the right gallery or platform to represent their work, and the challenge of building an international network of buyers. Brexit was also mentioned as a barrier for selling into the UK. Some mentioned that they sell directly to clients without the support of a gallery, while others rely on online sales through their own e-commerce platform or through third-party marketplaces. In some cases, due to the geographic location of their businesses, it becomes truly difficult to sell abroad and do the due tasks involved such as attending to exhibitions, visit tentative galleries or buyers etc. In conclusion, while there are some challenges to selling abroad, many craftspeople are actively seeking out new international markets and investing time and resources into building their brand and network overseas.

MAIN MARKETS MENTIONED	MAIN BARRIERS OR DIFFICULTIES
European countries: United Kingdom, Germany and France United States Japan	High shipping costs Customs fees Need of a gallery or platform to represent the work Making the brand or themselves known Building an international network Brexit (sales to the United Kingdom)

Table 9. Exporting: markets and barriers

MARIEKE VAN HEESBEEN, PRODUCT DESIGNER SPECIALISED IN CERAMICS (NETHERLANDS)

“I do sell abroad. The difficult part is finding the right spot where your design in combination with the price fits. It takes good research, not only internet research but also getting your products there. To learn what is interesting (for the buyer) and not.”

Fairs and exhibitions can be a way to sell and also to gain recognition nationally and internationally. Craftspeople talked about their experiences and preferences and, considering their responses, it seems that the best exhibitions and fairs for crafts are those that are targeted to specific markets, either by material or by style, and those that only sell high-quality crafts. Some of the mentioned exhibitions and fairs include:

1. **Révélations.** The International Biennial of Crafts and Creation held every 2 years in Paris. Révélations brings together the creation market's professionals and fine crafts aficionados around unprecedented works and exceptional expertise. This fair is more targeted towards high-end crafts and has a more contemporary feel.
2. **Collect London.** Considered a leading international fair for contemporary craft and design. Collect showcases exceptional work made in the last five years by living artists and designers allowing each gallery to curate their own display and commission new pieces or bodies of work, especially for the fair.
3. **London Craft Week:** London Craft Week takes up residence in the capital early each May. This annual event showcases the very best international and British creativity and craftsmanship through a 'beyond luxury' journey-of-discovery. It is focused on a curated selection based not on price or fame, but on the "underlying substance". They claim to celebrate outstanding British and international creativity. London Craft Week brings together over 750 established and emerging makers, designers, brands and galleries from around the world.
4. **Maison & Objet.** It is a major French trade fair for interior design. Held bi-annually in Paris Nord Villepinte Exhibition Center, it has been described as "among the 3 most important European events for interior design. This fair has been mentioned positively and negatively.
5. **Homo Faber Event in Venice.** Although it is not an open or commercial fair, this exhibition was mentioned positively by one of the craftspeople as a really good experience. Organised by the Michelangelo Foundation, it features contemporary craft from around the world.

From the experiences of craftspeople we can conclude that the best exhibitions and fairs for crafts are those that are well-organised, well-funded, and targeted towards specific markets. It is also important to consider the relevancy of the work of every particular craftsperson to the orientation and style of the fair or exhibition.

02/ 06

Key driving factors and challenges in the sector

Crafts are in the air. They are definitely have become a topic that has increased its presence in the last years. From the perspective of public opinion it enjoys quite good image among citizenship. This relevance should spill to other strata of society, spreading its influence to policy makers, social agents, industry leaders, retailers, etc. In this section of the study we aim to identify which are the key factors that influence crafts in Europe, the opportunities that craftspeople and experts identify as well as the threats that could menace the sector.

Img.: Susan Wilkinson © via Unsplash

OPPORTUNITIES FOR EUROPEAN CRAFTS

Craftspeople and experts identify new opportunities for the crafts sector. The most significant point of agreement between them is that there is a growing interest in crafts and that is a huge benefit. The rise of consumer concerns on sustainability has opened up an opportunity related to the image and tradition of many crafts because they are often produced locally and are perceived to contribute to local economy. They agree that there is a need for more collaborations in the crafts sector, especially with designers and art schools. The experts also suggest that the crafts sector should collaborate more with adjacent sectors such as tourism, culture, and hospitality. The experts emphasise the opportunity of an efficient re-branding of crafts, showing the relevance and utility of crafted objects compared to mass-produced commodities. Among the craftspeople it is mentioned the possibilities for innovation allowed by new technologies and easier access to modern machinery and programming. The general sentiment is that there are new opportunities for growth, consolidation and the raising of awareness.

THREATS FOR EUROPEAN CRAFTS

The economic crisis resulting from the effects of COVID-19 pandemic and the war in Ukraine has led to a decrease in the purchasing power of the general population, affecting negatively the crafts sector. Furthermore, the increasing prices and lack of availability of certain materials and the weakening skillset of traditional craftsmanship are other significant challenges for the craft sector. High taxes, rising shipping costs, expensive rental spaces, as well as the lack of financial support from public administrations, are also a cause of concern. Some experts mentioned additional threats such as the ageing of professionals in the sector, lack of generational succession, the disappearance of small retailers, the return to the consumption of low-end products, and the perception of the craft sector as in decline by those responsible for public policies who then abandon the sector. They also pointed out the possible long-term effects of the COVID-19 pandemic, contraction of demand, significant increase in raw material prices, and notable increase in the prices of energy. Finally, the technological gap in the use of virtual tools, and the high weight of contributions to social security systems and rigid tax systems are other important threats identified by experts. Craftspeople also mentioned the difficulty of achieving visibility and recognition for their work.

Despite these threats, most craftspeople have seen a growing appreciation for handmade quality commodities and potential clients who appreciate their work. The need for more education and craft courses and workshops to raise awareness and appreciation for the difficulty of handwork among the general public was also mentioned. Some experts call for a unified tax system at the European level, while some craftspeople see the need for lower taxes for craft pieces, in particular if we consider that the VAT applied to crafts and mass produced products or some other luxury products is the same.

OPPORTUNITIES & THREATS

OPPORTUNITIES	THREATS
Renewed interest in crafts and increased media exposure	Decrease in the power of purchase due to economic shocks and inflation
Re-branding of crafts for showing relevance	Weakening of skillsets of traditional craftspeople
Alignment with sustainability concerns	Ageing of crafts professionals
Collaboration with designers, art schools and adjacent sectors (tourism, culture, hospitality, industry)	Reduction of consumption as a trend: reduction of material purchases, increase of service and non material purchases
Easier access to global markets	Raw materials availability
Demand of experiences related to crafts	Disappearance of distribution channels traditionally linked to crafts (local small retailers in cities)
Entry of new profiles in the business: architects, designers, artists … who may help to update the craft sector	Non unified tax system in Europe
Renewal of image favoured by younger craftspeople	Rigid tax systems
Social media access and online sales for SMEs	New technical regulations for certain products
Increase of interest by the luxury industry	
Rise of new forums such as Homo Faber or the Loewe Foundation Craft Prize	
Access to new technologies and machinery for innovation and competitiveness	
Greater interest for the storytelling and knowledge of craft	
The rise of new high quality crafts fairs	

Table 10. Opportunities and threats of the crafts sector

KEY FACTORS TO GUARANTEE THE FUTURE OF CRAFTS, AND THE FUTURE OF BUSINESSES FOCUSED ON CRAFTS

The experts and craftspeople agree that education and training are key factors to guarantee the future of crafts. It is necessary to have a better recognition of the crafts makers. Public authorities must develop awareness by giving special status and particular rights in accordance to their singular nature. It is important to ensure that the skillsets and trades will be maintained, and more people will be trained to become craftspeople. There is the view among the interviewed that legislation and taxation should favour craftsmanship over mass production.

In addition, craftspeople emphasise the need for better communication with their target audience and for educating people to appreciate and value hand-made work. They suggest that initiatives for the establishment of more national and inter-regional networks, whether they be governmental or private, would help communicate the strengths and values of the craft sector. Politically the status of the craft sector could be lifted for example by easing tax requirements in some occasions.

Furthermore, both experts and craftspeople recognize the importance of adapting to market trends and demand, with a focus on sustainability, local materials and production, as well as social innovation. It is also crucial to pass on the skills to the next generations, and this can be achieved through education and apprenticeship programs which should be a shared responsibility, not just something that relies completely on the craftsperson who has the knowledge. Craftspeople also express the need for government and local organisations' support, professional qualification recognition, and export incentives.

Finally, some have suggested that if there would be an universal income similar to the grants awarded to farming in Europe, there would be better chances to make a living in the craft industry.

“There must be a better recognition of the crafts makers... Public authorities must involve themself to develop crafts by giving special status, rights and recognition. Art & Crafts are everywhere around us...”
Hélène Martiat, President of BeCraft (Belgium)

“There must be an updated craftsman database. Craft presentations should be carefully organised in schools. The non-profit sector must be supported so that it can educate people and organise various events where craftsmen can sell their products.”
Daniela Kytková, Gallery and design concept store owner, vPRIESTORe (Slovakia)

“ ...Craft products and services need to meet the demand. There will be always a demand for personalised products. People want to differentiate themselves from their peers by having something special and different. Craftspeople need to understand the demand, the market trends and adapt to it. The positive thing is that craft enterprises are very flexible and adaptable and resilient. So there is a future for them.”
Laura Miguel, Curator and consultant specialised on crafts and creative industries (Spain)

MARION POORTVLIET, FOUNDER AND DIRECTOR OF CRAFTS COUNCIL NEDERLAND (THE NETHERLANDS)

"To guarantee the future of crafts we have to innovate and to connect to current issues like sustainability, local material, local production and social innovation."

ALMA JANTUNEN, GLASS BLOWER AND ARTIST (FINLAND)

" ... Small, one persons business can't take the responsibility of saving the knowledge and teaching it to the next generation..."

CHAO-HSIEN KUO, JEWELLERY ARTIST AND JEWELLERY DESIGNER (FINLAND)

"There need to be more people who appreciate the crafts and understand the value of the works. We need more opportunities to show the works. I am confident that if there would be more people who knew my works, I will sell much better."

02/ 07

Key players in European crafts

Organisations in charge of clustering, organising, supporting and managing businesses and individuals under the umbrella of crafts are highly fragmented. There are local, regional and national government support agencies, non-profit organisations and associations which represent the interests of the sector at higher levels and connect craftspeople and craft businesses to each other.

Img.: Mia Baker © via Unsplash

Some organisations and projects in charge of promoting and supporting crafts at a national level are:

- Meisterstrasse HandmadeAssociation (Austria).
- BeCraft (Belgium). - member
- Mad'in Europe (Belgium).- ECA member
- Crafts Bulgaria (Bulgaria).
- Meshtra – Traditional Knowledge and Crafts (Bulgaria).
- The Croatian Chamber of Trades and Crafts (Croatia).
- Cyprus Handicraft Service (Cyprus).- ECA member
- AczCC - The Czech Association of Cities of Ceramics (Czech Republic).*
- Arts and Theatre Institute (Czech Republic).
- ACAB / Arts & Craft Association Bornholm (Denmark).- ECA member
  Danish Crafts & Design Association (Denmark).- ECA member
- Eesti Rahvakunsti ja Käsitöö Liit. Estonian Folk Art and Craft Union (Estonia).
- The Finnish Association of Designers Ornamo (Finland).- ECA member
- Taito. The Finnish Craft Organisation (Finland).- ECA member
- AfCC - Association française des Cités de la Céramique (France)*
- Ateliers d’Art de France (France).- ECA member
- Institut National des Métiers d’Art (INMA) (France).- ECA member
- Georgian Heritage Craft Association (Georgia).- ECA member
- Georgian Arts and Culture Center (Georgia).- ECA member
- AgCC - Association of German Cities of Ceramics (Germany)*
- Bundesverband Kunsthandwerk Deutschland (BK) (Germany).- ECA member
- Greek Association of Traditional Art & Craft Producers (Greece).
- Association of Hungarian Folk Artists (Hungary).
- Design & Crafts Council of Ireland (Ireland).- ECA member
- AiCC – Italian Association of Ceramic Cities (Italy)*.- ECA member
- Artex- Centre for Artistic & Traditional Handicrafts in Tuscany (Italy).- ECA member
- Fondo Plastico (Italy).- ECA member

*They belong to AEuCC (Agrupación Europea de Cooperación Territorial Ciudades de la Cerámica / European Grouping of Territorial Cooperation Cities of Ceramics), a European Grouping of Territorial Cooperation that groups together the Associations of Cities of Ceramics in Europe. Each association represents municipalities with “ancient ceramic tradition” (Italy, 45 cities; France, 3 cities; Spain, 25 cities; Romania, 12 cities, Portugal 18 cities, Czech Republic 3 cities, Germany 9 cities, . In total, the area of the AEuCC EGTC includes 115 European cities.

Some organisations and projects in charge of promoting and supporting crafts at a national level are:

- OMA – Osservatorio dei Mestieri d’Arte, Fondazione CR Firenze. Observatory for Arts and Crafts, (Italy).
- The Association "Latvian Folk Art Union" (Latvia).
- The Lithuanian Council for Culture (LCC) (Lithuania).
- The Fine Crafts Association of Vilnius (Lithuania).
- De Mains De Maîtres Luxembourg (Luxemburg).- ECA member
- Malta Crafts Foundation (Malta)- ECA member
- Crafts Council Netherlands (Netherlands).- ECA member
- Norske Kunsthåndverkere (Norway).- ECA member
- Norwegian Craft (Norway).- ECA member
- Nów. New Craft Poland (Poland).
- AptCVC - The Portuguese Association of Cities and Villages of Ceramics (Portugal)*
- Associação de Artesãos Serra da Estrela (Portugal).- ECA member
- ADXTUR- Agência Desenvolvimento Turístico das Aldeias do Xisto (Portugal).- ECA member
- CEARTE - Centro de Formaçao Profissional para o Artesanato e Património (Portugal).- ECA member
- ArCC - The Association of Romanian Cities of Ceramics (Romania)*
- Centre for Folk Art Production – ÚĽUV (Slovakia).- ECA member
- Chamber of Craft and Small Business of Slovenia (Slovenia).
- AeCC - Asociación Española de Ciudades de la Cerámica (Spain)*
- Consorci de Comerç, Artesania i Moda (Spain).- ECA member
- EOI Foundation - Fundesarte (Spain).- ECA member
- Oficio y arte, Organización de Artesanos de España (OAE) (Spain).- ECA member
- The Swedish Crafts Centre (Sweden).- ECA member
- Handicraft Chamber of Ukraine (Ukraine).- ECA member
- Crafts Council (United Kingdom).- ECA member
- Crafts Scotland (United Kingdom).- ECA member

*They belong to AEuCC (Agrupación Europea de Cooperación Territorial Ciudades de la Cerámica / European Grouping of Territorial Cooperation Cities of Ceramics), a European Grouping of Territorial Cooperation that groups together the Associations of Cities of Ceramics in Europe. Each association represents municipalities with “ancient ceramic tradition” (Italy, 45 cities; France, 3 cities; Spain, 25 cities; Romania, 12 cities, Portugal 18 cities, Czech Republic 3 cities, Germany 9 cities, . In total, the area of the AEuCC EGTC includes 115 European cities.

The European Union is supporting crafts in several ways, including through the Creative Europe programme which puts a major emphasis on transnational creation, innovation, mobility schemes for artists and professionals, as well as actions that target the needs of specific creative sectors (such as music, architecture, and cultural heritage). The Creative Europe programme 2021-2027 has a budget of €2.44 billion which it will invest in actions that reinforce cultural diversity and that will respond to the needs and challenges of the cultural and creative sectors. This programme is managed by the Education, Youth, Sport and Culture Department of the European Commission. The particular strand devoted to crafts is "Traditional crafts for the future: a new approach" HORIZON-CL2-2022-HERITAGE-01-04. Three projects have been funded within this strand and The European Crafts Alliance is partner in one of them.

In addition, the EU's Horizon Europe Framework Programme (HORIZON) funds research projects which support and foster traditional craft techniques and reinforce vocational training in these domains as a means to foster job creation and revive enterprises (See Call: Research and innovation on cultural heritage and CCIs - 2022 (HORIZON-CL2-2022-HERITAGE-01). Horizon Europe is the EU's key funding programme for research and innovation with a budget of EUR 95.5 billion.

As a transnational and European representative organisation, the European Crafts Alliance is the unique body that groups interests across the territory. It consists of 36 members among which are national, regional, and professional craft organisations in 22 European Countries (15 of them in EU-27). Thanks to the project CRAFTING, the European Crafts Alliance is:

- Enhancing its role as THE representative organisation and voice for crafts in Europe.
- Generating a structuring and clustering effect on the European Crafts sector.
- Reinforcing the capacity of the sector to influence and be heard as a collective in European and international institutions.
- Promoting the generation of knowledge about crafts in Europe, its nature, impact, specific needs, vulnerabilities and strengths.
- Promoting training opportunities in entrepreneurial, digital, financial and management skills.
- Unveiling and accelerating the transformative role of the European crafts sector as a driver of sustainability and circular economy.
- Envisioning the untapped capacity of crafts to transform economic models and to generate thriving communities.

During the last years transnational and national governmental agencies as well as private associations, have given rise to a series of foundations and private organisations promoted in many cases by fashion conglomerates or luxury brands. These organisations are gaining an established presence in the crafts sectors thanks to the visibility that they provide for craftspeople often times coming in the form of competitions with coveted prizes. Some of these associations and foundations have been mentioned by the craftspeople and experts interviewed in this study. Among them it is worth to mention the Loewe Foundation, the Michelangelo Foundation For Creativity & Craftsmanship and their Homo Faber Guide and Event, and LVMH Métiers d'Art and their Institute of Métiers d'Excellence.

Loewe Foundation, through Loewe Foundation Craft Prize, has become one of the most renowned competitions worldwide. A jury composed of 13 leading figures from the world of design, architecture, journalism, criticism and museum curatorship, together with the winner of the previous edition, select every year the winner of the Craft Prize. The prize awarded to the winner is 50.000 Euros in cash, an international exhibition of their work as well as a series of activities that result in a high degree of exposure for them.

The LOEWE FOUNDATION Craft Prize seeks to acknowledge and support international artisans of any age (over 18) or gender who demonstrate an exceptional ability to create objects of superior aesthetic value. By identifying work that reinterprets existing knowledge to make it relevant today while reflecting its maker's personal language and distinct hand, the LOEWE FOUNDATION aims to highlight the continuing contribution of craft to the culture of our time.

Homo Faber Guide is a digital platform that showcases contemporary crafts. It is a signature project of the Michelangelo Foundation. The guide features talented artisans, ateliers, manufacturers, museums, experiences and shops. It connects its audience with crafting excellence through organised events where one can meet artisans, participate in masterclasses, enjoy a guided tours of workshops and in general be inspired by the creativity of craftspeople. The Foundation is very active in organising exhibitions and it has an important agenda to become a relevant player in crafts in Europe.

LVMH Métiers d'Art is a division created by the luxury giant "to protect and develop the access of its fashion houses to raw materials and excellence know-how." The group thus advises and supports its best suppliers to ultimately establish a unique craft industry in the world. Luxury groups need skilled professionals to guarantee the level of their creations and the development of a support network is key for this purpose. It was created by the LVMH Group in 2015 and it spans a variety of manufacturing facilities and highly skilled craftspeople.

The Institute of Métiers d'Excellence LVMH (ME Institute: masters of excellence) claims to be the first training program in the luxury industry with a work-study format. The ME Institute offers training in Creative, Craft and Client Experience métiers. Thanks to this initiative the conglomerate contributes to raise the Métiers of the future.

"The ME Institute has met the challenge it took on when the program was launched in 2014, namely to develop the employability of apprentices, regardless of their initial qualifications, while at the same time preserving the unique savoir-faire that is emblematic of LVMH Maisons."

Private philanthropic initiatives together with the real needs of luxury conglomerates to guarantee exquisiteness in techniques and materials in the future, are shaping new models of promotion for the sector. In many occasions, they are covering needs that are not met by government or associative initiatives. Both models are needed to readjust and cooperate in order to fully respond to the challenges that crafts are facing nowadays and in the near future.

02/ 08

Sustainability of crafts

The role of crafts for the environment and social wellbeing is viewed as important by both experts and craftspeople. Experts note that crafts can be sustainable when kept on a small scale, use local materials, and support changing production chains. Additionally, there have been mentioned the therapeutic qualities of craft and how it supports social innovation. They also note that durable, high-quality products can reduce waste and promote sustainable consumption. Similarly, craftspeople say that crafts can bring people and communities together and perpetuate ancient knowledge. Crafts can improve mental health and reduce stress. Craftspeople highlight the importance of creating quality items that people will take care of, which indirectly benefits the environment. Overall, both groups see crafts as having the potential to support sustainable consumption, social cohesion, and individual well-being.

"I believe that in the context of social evolution in which the ceiling has been reached in many areas of production, the only way to move forward is to go back in the mode of production. In this sense, resuming crafts as a productive means is sustainable both at an environmental and human level."
Henar Iglesias, Feather artist (Spain)

Img.: Chandra Oh © via Unsplash

PIOTR JEDRAS, KNIFE MAKER, KLOSY KNIVES (POLAND)

“I don't think we make any direct positive impact on the environment. But I think that we may be a prodigy of the way of approaching consumerism ... We want to bring back the respect for objects in daily life. And maybe this is an indirect way of making things better for the environment. We also make daily tools beautiful and pleasant to use, which I believe bring some joy to people’s life.”

IBEN HØJ, TEXTILE DESIGNER AND ARTIST (DENMARK)

“Materials with meaning, that tell a story of generations, skills passed on and time and effort spent learning, refining and growing, mean so much. I think most people can feel or sense the difference. When we surround ourselves with objects that carry this meaning within, we also experience a closer connection to our environment. I think there is a warmth to embracing the qualities of a product that is wellmade, using the best materials, and crafted by hand - it does improve well being. We feel connected to something larger than ourselves.”

03

The jobs in crafts: working conditions, skills and future prospects

Knowledge of the singularities and challenges of the crafts labour market are key to efficiently support European craftsmanship. Our heritage , our "made in", is one of our main strengths to competes with many other countries. How professionals currently perceive working conditions and their prospects for the future will determine the sustainability of this highly skilled labour activity. Through the in-depth interviews we have captured the sentiment of those involved.

"Working in crafts is life changing, expresses experience and connects the maker to the consumer"

Michael Hofmeyer, Goldsmith, jewellery designer and maker of jewellery, MHGOLD (Australian currently living in Padova, Italy).

03/ 01

Current working conditions of craftspeople

They may work just by themselves, or in integrated larger workshops, or even in factory-like positions in medium-large companies that produce hand-made objects. Some of them have a more artistic approach and some of them are specialised and perform repetitive tasks. Craftspeople have been a significant part of European culture for centuries, producing unique and often high-quality handmade items. They have articulated the structure of historical cities and now they are part of a new urban movement that gives appeal to previously drab or rundown neighbourhoods. The working conditions of craftspeople have changed over the years, with some facing challenges such as high living costs, ageing skilled workforce, and a lack of younger practitioners. Despite the difficulty to assess such diverse situations, to understand the current state of the working conditions of craftspeople in Europe, experts and craftspeople were asked about their views on the subject.

Img.: Grinko Y. © via Unsplash

The following list compiles their responses that often express different points of view:

1. Craftspeople have tended to set up their businesses in the countryside, but now many are forced to do so because housing has become so expensive in most cities.
2. The working conditions for craftspeople are safe and reasonably good, but there are very big differences from those who have the appropriate place to produce and receive customers and those who don't.
3. Craftspeople in Denmark and other Scandinavian countries have been particularly affected by the closure of factories that had employed craftspeople.
4. Craftspeople are mostly self-employed, with a majority working part-time as craft artists and part-time in other employments.
5. There is room for improvement in terms of support from governments, to guarantee reasonable working conditions.
6. Craftspeople work longer hours a day than the average and receive less pay than the average salary in their country.
7. Craftspeople have mostly insecure working conditions, but on the upside, they enjoy some sort of freedom in their work and life balance.
8. Working conditions are specially hard for beginners and better for those who follow a family tradition or already know the business.
9. Most of the makers work alone. There is a need to connect and learn from each other.

When asked wether working conditions have improved or worsened in the last decade, there is no consensus about it - some mentioned that conditions have improved, while others stated that they have worsened. Experts generally agree that access to a good workspace has become more difficult, but there are more government helps now for young entrepreneurs. The use of new technologies has made hard work easier, but rising business costs and the difficulty of finding new people to hire sometimes makes the work more difficult to carry out. The opinions are divided, with no clear agreement.

We also asked them if they lived solely on their sales of crafts. Based on the responses of the craftspeople, it can be concluded that most of them do not live solely on their sales. They have other sources of income such as teaching crafts, being assistant professors, consulting, working out of grants for artistic projects, etc. The composition of their incomes varies greatly, with some earning the majority of their income from selling their crafts while others earn more from teaching or other related activities. Some also have diversified their income streams by offering workshops, creating a shop with ceramics, or working on commissions. 20% of the interviewed make a living solely with their crafts sales, 60% of them make 50% or more of their incomes from sales of crafts or crafts related activities, and the last 20% makes less than 50% of their incomes from sales or crafts related activities. Although there are many exceptions, nowadays craftspeople are usually in a portfolio work, rather than in a full-time job. For most of them, earning a living solely from selling their crafts is challenging. Usually another source of income is required. Some of these sources are: teaching (crafts and other subjects not related to this), collaboration with art galleries or museums and grants.

03/ 02

Perception about the future of crafts jobs

There are concerns that many traditional crafts are being lost as younger generations are not as interested in learning these skills. In addition, many crafts jobs are low-paying and may not offer the same level of stability and benefits as other professions. In this environment some craftspeople are embracing digital tools and online platforms to reach a wider audience and streamline their operations. Others are focusing on preserving traditional techniques and promoting the value of handmade goods.

Img.: Deepmind © via Unsplash

Definitely, the future picture for crafts jobs and careers is shaped by a new set of circumstances and issues that will alter the traditional image of the master craftsperson creating in solitude. Cooperation has been mentioned as one of the main drivers of change and prosperity. It is a must for reducing operating costs but also a new way of broadening the income sources. In the future, craftspeople will need to cooperate to cover their training gaps. Value will be found in collaboration with new profiles such as designers, architects, engineers or artists. Cooperative production hubs generate centres for networking, a breeding ground for collaborative projects and peer training models. From these collaborations will emerge hybrid profiles which will be difficult to categorise only as "craftspeople, designers or artists". Hybridation will likely be a characteristics of the crafts job in the future.

Many of the jobs of craftspeople will require higher competences in the use of new tools such as artificial intelligence, 3D printing or Computerised Numerical Control (C.N.C.). Despite being a tentative threat to the hand driven skills of the craftsperson, the use of these technologies may bring higher productivity rates, freeing them from low added value tasks in the creation process. The demanding training required to gain the skills of the craftsperson in any field will be, very probably, complemented with these new abilities.

The term "craft thinking" is being used to express a type of mind frame, just like the already established concept of "design thinking". When consultancy professionals and academics realised the benefits of applying the methods and processes followed by designers for solving problems by employing the iterative, hands-on approach to creating innovative solutions of designers, design thinking was developed as a methodology. The concreteness of the craftsperson and the instinctual knowledge of the materials' possibilities can be beneficial for example to artists or product designers when projecting a new object. The practical approach of craftspeople and their ability to quickly prototype materials before starting fabrication can be studied in order to develop new lean manufacturing methodologies. Provided this theory is elaborated on, in the future craftspeople may work as thinkers, planners and makers with many other conceptual professions.

In a different vein, the sustainability of crafts jobs of the future will also depend to a great extent on the tax and legal policies carried by national and local governments. So far the particular nature of the crafts sector hasn't been fully valued for its contribution to the national cultural and creative industries, or to some other industries such as tourism, hospitality or fashion. Its role as a component of the European heritage and identity (that preserves community values and supports intergenerational dialogue) is not yet fully understood among policy makers.

INTERVIEW OF AMERICAN CRAFT COUNCIL EXECUTIVE DIRECTOR SARAH SCHULTZ TO BUILDER AND DESIGNER YVONNE MOUSER

... I do think of them as separate (design and crafts), but overlapping or interlocking. Craft is more about "the how" of an object. And design is more about "the what" or the idea of an object.

....

You could be a designer, drawing up a piece of furniture, and realise there's no way that the piece can be made. So maybe one way craft thinking could be applied is in understanding the nature of the material which can inform design decisions.

03/ 03

Identification of the gaps in skills and education of craftspeople

During the in-depth interview craftspeople and experts were asked if they thought there were gaps in the skills of craftspeople. In summary, the responses indicated that there are gaps in various areas such as business management, marketing, design, and self-promotion. Some of them also mentioned a lack of interest in traditional crafts among younger generations There is a general consensus that there is a need for collaboration and education in various areas to address this issue. Additionally, changing the focus within craft practices, teaching methods, and new technologies were also mentioned as necessary factors for a good education.

On the other hand, some experts disagreed on the severity of the issue. One expert indicated that in Sweden there are no gaps due to the presence of universities educating crafts at BA and MA levels. Another person mentioned the high level of crafts education in the Netherlands. There was also satisfaction with education in crafts in Germany although it could be expanded. In contrast Slovakia was mentioned as lacking education around the crafts.

There is broad agreement that education and training in crafts is important and necessary, especially in terms of early education, and that it plays a critical role in human development and in the development of individual creativity.

Img.: Marisa Grootes © via Unsplash

Common points that can be drawn from the opinions collected are:

1. The need for business skills is emphasised, as most craftspeople lack the necessary knowledge to create a successful business, in both: official education and life-long learning available offer.
2. There is a shortage of formal education in certain crafts and in some countries, which needs to be addressed.
3. The lack of training positions in creative professions is a problem in some countries.
4. There is a need for training on techniques that are in the process of extinction.
5. The cost of mentoring and the lack of funding to support this important educational method poses a problem when craftspeople need to incorporate new people.
6. The lack of certificates and formal qualifications for many crafts is also a concern.
7. Experts emphasise the need for training in branding and storytelling.
8. Craftspeople focus more on how to monetize their creative skills.

LIST OF SKILLS THAT NEED ENHANCING FOR CRAFTSPEOPLE IN EUROPE

1. Business and marketing skills
2. Ability to connect with evolving sales channels
3. Self-branding and entrepreneurship
4. Pricing skills
5. Effective promotion of the craft work
6. Skills in new technologies
7. How to develop of collaboration models
8. How to broaden perspective to find new applications to their skills

Based on the opinions of the craftspeople and experts we can make a list of potential skills' gaps of the craftspeople in Europe.

IMPRESSIONS ON THE FORMAL EDUCATION AND LIFE-LONG TRAINING IN CRAFTS

1. It is perceived that there is a need of traditional crafts education
2. Access to education has become easier thanks to new technologies and online programmes
3. Training in crafts have become expensive
4. Formal education is more general now
5. There is a risk of running out of teachers
6. Formal education has worsened due to bureaucracy
7. Crafts should be part of the official education at all levels, even in non crafts studies, to take advantage of practising “the art of making”
8. Communication should become an important part of the education and training on crafts
9. Education in design and creativity should be included in craft education programmes

04

Perception on the use of technology

Img.: Jean-Philippe Delberghe © via Unsplash

The opinions of craftspeople and experts on the use of technology in crafts seem to be similar in many ways. Both groups see technology as a valuable tool that can be used for both purposes (production and communication). Many respondents believe that technology can enhance the craft industry by making it more efficient and allowing for new materials and techniques to be used.

They also note that traditional craft skills and handmade processes are still essential and should be somehow prevailing. It has been noted that technology can be a helpful tool as long as it doesn't replace manual labour in key tasks. Both groups agree that the use of technology should make sense and not be a mere gimmick. Some of the benefits of technology in crafts that have been mentioned are:

- To simplify work routes without compromising the idea and the result
- To push forward the boundaries of materials
- To gain in efficiency
- To simplify processes
- As an experimental source for crafts
- To devise designs and preview results
- To prototype easily, cheaper and faster before bringing the product to market

“Technology shouldn't be seen as an enemy for the crafts sector. It's an ally that can be used in some processes of the business (management, production, preparation of the material, communication, etc.). The importance here is to know the available technology, learn how to use it and choose the best ones for their needs.”
Laura Miguel, Curator and consultant specialised on crafts and creative industries (Spain).

“I think technology is a part of our current society. Therefore all industries have been affected by technology. As a tool for communicating and marketing, it has been great for craft SMEs that otherwise wouldn't have had visibility. And as a tool for the production process it has been also a great opportunity, since they can reduce repetitive tasks and focus on other more important activities . They can prototype easily, cheaper and faster, before they put something into the market. Technology also offers new ways of thinking that they didn't have before, so that will bring innovation into their products and new ideas.”
Silvia Martín, EOI Foundation-Fundesarte manager (Spain)

“I think technologies can be a very interesting way to combine with crafts in an experimental way. For me the most valuable craft objects are still the ones made by the artist itself.“
Dimitar Stankov, Contemporary jewellery and art objects (Belgium).

“If the technology allows for the design which is not possible to make by hand or could save much time and make the job easier, why not? As long as the design and craftsmanship are kept in a good standard.”
Chao-Hsien Kuo, Jewellery artist and jewellery designer (Finland)

Img. Anfal Shamsudeen © via Unsplash

The experts specifically note that technology can be used by small businesses to increase their communication power. The possibilities opened by relatively cheap access to communication technologies make it easier for crafts businesses to gain visibility and improve their relation to customers and media. Also craftspeople think that the digital channels and digital communication will continue to grow. They were asked if they use online channels to broadcast their business or sell their works, and also what is their opinion about them. There are several common points regarding the use of online channels in promoting and selling their works such as:

- Instagram is a popular online channel among craftspeople and experts, followed by Facebook and personal websites.
- Online channels provide wider exposure and accessibility to potential customers, which is particularly useful for those living in smaller cities or areas with limited physical access to potential customers.
- Using online channels requires time and effort to maintain, but it can be a cost-effective way to promote and sell their works.
- There is a general consensus that the effectiveness of online channels depends on the type of product and the price.

However, there are also some concerns about this new way of communicating:

- It can mean an extraordinary effort and be not very effective, as well as time consuming, distracting attention from the real crafts work.
- Algorithms have become extremely difficult to understand. There is a high degree of uncertainty and very limited control over success on the platforms.
- The audiences in social media very often are predominantly endogamic; it is very common that the followers are other craftspeople, not customers.
- Chat messaging features, although they guarantee direct communication to customers, can also become a distraction.

05

Conclusions and recommendations

Img.: Jean-Philippe Delberghe © via Unsplash

05/ 01
Conclusions

The following conclusions are based on the insights discovered through the research. This list is a diagnosis of the European Market for Crafts which covers demand, offer, jobs and prospects of the market.

1. **As we have identified the profile of the current buyer of crafts and the nonbuyer, it is possible to develop strategies that resound with their habits, interests and beliefs.**
2. **Communication and branding strategies should focus on the main motivations to buy revealed in the survey.** They are: the commitment of the buyer with supporting the traditional craft techniques, the search of individuality and self expression through unique and non standardised items, the identification of the crafted object to oneself and the importance of materials.
3. **Most of the non-buyers of crafts state that they would buy if certain conditions were met**, so there is room to convert some of them into new customers.

Img.: R. Muñoz

4. **Trends influence the way people live, think and buy and this is applicable to crafts too.** Understanding the main concepts behind trends is useful to navigate through uncertain and changeable environments.
5. **Lighthouse cases identified by trends research sources can show craftspeople how they can align to new dynamics**, imagining the future without compromising neither their art nor their identity. New paths for innovating their businesses are possible.
6. **Craftspeople's online channels are the main source of information for buyers**, hence the importance to take care of the content, story and functionality of these sources.
7. **The market is fragmented and non-uniform.** It requires a huge effort to come to an agreement about the content of crafts at a European level for the sake of the sector itself, beyond particular, regional or national interests.
8. **The estimated size of the serviceable available European market for crafts is 153 million people in Europe, and 50 billion euro in value.**
9. **Average annual expenditure on crafts for the European crafts buyer has been estimated at 346€ in 2022.** Expenditure raises in correspondence with the age of the buyer.
10. **European crafts sector's main strengths** are a really good basis to communicate the value of crafts applied to other sectors. For example the coexistence of tradition and innovation, the link with the particular territories and its culture, and its individual and experimental attitude towards craft-making.
11. **Main weaknesses of the sector are related to the lack of proper mindset for business among craftspeople**, which often juggle producing and marketing their work without professional knowledge of the latter. Craftspeople don't need to be experts on marketing or communication but they need to have reasonable access to professionals to help them cover that part of the business, which necessarily means in most of the cases, to find out creative ways to share with other colleagues the expenses of the services of agencies or consultants.

12. **Tax systems all over Europe are not adapted to help the craftsperson cope with the particularities of their economic activity.** Time consuming production, long periods of time to reach the skills to become a master, seasonality, high degree of portfolio careers in crafts, etc., are factors that make difficult the competition with other sectors. VAT percentages of crafts are the same as those for luxury items or non-basic industrial items.
13. **There has been a shift towards online sales channels for crafts in the last five years.** However, taking into account the responses of the buyers and non-buyers, the brick and mortar stores still are important.
14. **Internationalisation for craftspeople is not easy** due to the expensive shipping costs, the difficulty to find a representative or gallery, and the demanding customs regulations.
15. **The mounting interest in crafts needs to be capitalised on by authentic craft businesses.** Craftsmanship is being celebrated in media, used as a marketing strategy by internationally renowned massive brands in fashion or interior design, etc. This momentum is an opportunity to unveil the value of crafts and craft thinking in our society, along with the joy of using crafted objects in our everyday life.
16. **Crafts survival is important not only for craftspeople.** Crafts are the content of many other economic and non-economic activities. Tourism, leisure, culture, arts, industry - all of them need crafts for their spaces, for their shows, for their pieces of art, for their prototypes, for their communication, etc. Therefore, the responsibility to take care of crafts and its survival shouldn’t fall on the craftspeople shoulders exclusively.
17. **Reduction on the disposable income of European citizens** is a threat for the economy and also for crafts businesses. The exploration of new markets where the influence of inflation is lower or the recovery is faster than in Europe, could be a key to diversify sales and risk.
18. **Education and training are key factors to guarantee the future of crafts.** For better recognition of the crafts makers, public authorities must develop crafts awareness by giving special status and particular rights according to its singular nature. It is important to ensure that the skillset and trades will be maintained and more people will be trained to become makers.

19. **Public and private cooperation is essential for the key players of European crafts.** Resources can have a greater impact if redundancy in programmes is reduced and strategies complement each other.
20. **Craft supports social innovation** and individual well-being, can reduce waste in production and help raise awareness on sustainable consumption.
21. **Working conditions among craftspeople are very diverse.** Makers may work just by themselves, in larger workshops or even in factory-like positions in medium-large companies that produce hand-made objects. Some of them have a more artistic approach and some of them are specialised and perform repetitive tasks. The fragmentation of the market and the lack of agreement in the different regions and countries about the definition of what a job in craft is, does not help to address the needs of the workers. Therefore the importance to agree on a definition.
22. **Craftspeople have historically articulated the structure of historical cities and now they are part of a new urban movement** that gives appeal to previously drab or rundown neighbourhoods.
23. **The future of the crafts jobs is influenced by a brand new set of circumstances.** Cooperation will be one of the main drivers of change and prosperity. It will reduce operating costs and broaden income sources. From these collaborations will emerge hybrid profiles, which will be difficult to categorise and the jobs will require higher competences in the use of new tools such as the A.I., 3D printing or C.N.C.
24. **Although there is not a consensus, the main gaps in skills and education of craftspeople are:** business management, marketing, design, and self-promotion. The way to compensate or develop those skills in the future can be academic but could be also found in peer-to-peer cooperation, in intensive education programmes for professionals or in the exchange of experiences among craftspeople of different fields.
25. **Technology, as it has always been, will be an ally for crafts as long as it is not applied as a mere gimmick.** To simplify work routes without compromising the craftspersons' work, to push forward the boundaries of materials, to gain efficiency and competitiveness, to devise designs and preview results or to prototype cheaper and faster before creating the final product.

05/ 02 Recommendations

It is urgent to come to a minimum agreement on what is considered to be craft.

Even if it is a titanic task, to come to an agreement on minimum standards among the European countries on what belongs to craft it is the basic and most urgent task to start building a strong sector. It would require to make concessions from every party involved, but the upsides of this agreement are far more important than the particular views. An agreement is utterly advisable for fostering effective European and national policies.

Img.: Hari Av © via Unsplash

The concept and the image need to be re-conceptualised.

The meaning of crafts for craftspeople, citizens and policy makers is one of the main concerns and barriers to establish a dialogue in our society about how to preserve, update and support crafts. The usage of words to define new approaches to crafts is just a symptom of the urgent need to redefine and broaden the concept. Also to solidify that traditional crafts disciplines have a place in our contemporary lives. What are the common grounds and particularities of the master craftsperson, the crafter, the maker? How do we revise the image of crafts and craftspeople work in order to project a contemporary image of it? There are already many profiles that do not define themselves as craftspeople or craft oriented businesses but they are leading the crafted economy: designers that self edit limited editions of crafted products, fashion ateliers, custom made tiny houses builders, 3D models printing workshops, etc. Broadening the concept could be the key to the recognition of the importance of crafts in economy, culture and society.

To develop new ideas within the education and learning system

As the practice and skills development of the crafts apprentice need to happen in a workshop, and the knowledge is in the hands of master craftspeople, new models for learning and keeping records of the crafts techniques need to be implemented. The responsibility to preserve the trades doesn’t lie exclusively on craftspeople. Trades, techniques and knowledge are a valuable part of the culture of territories. Moreover, the training of apprentices is usually a slow and costly process that can compromise the sustainability of the craft business. Compensation should be rendered to those that document, preserve and transmit all the knowledge and skill behind the craft. Cooperation of active professionals as mentors in formal education would help to raise the quality of the learning experiences of young professionals. Governments must support hybrid education processes and assume that preserving crafts, as a profitable career is in the interest of a society that takes care of its identity and heritage.

Leading by example from the European institutions

The contribution of institutions as exemplary bodies and important buyers can be significant for crafts if they are included in public tenders, especially when it comes to equipping and decorating official facilities. A share of product crafted in Europe as a valuable criteria to be selected in public tenders could be a good policy for contributing economically to the sector. As an example from a different industry, in 2020 the French government passed a law that requires that the material used in all new public buildings is at least 50% timber or other natural materials. The law affects all public buildings financed by the French government and went into effect in 2022. We can learn and implement creative measures to foster crafts and improve its visibility.

Campaigning for rebranding cities through crafts as an alternative for territories to gain visibility

It can’t be denied that during the last decade many cities of the globalised Western countries have experienced a new wave of “material businesses” and “productive jobs” that contradicts the apparent triumph of information based enterprises. There is a new generation of professionals that have revisited the traditional retail businesses and rescued crafts and repairs works energising neighbourhoods and cities. The rise of a creative class and creative industry, the love for local products, the will to reintroduce production to European cities, the rise of awareness to change consumption of low-quality and non durable products for truly long lasting and high-quality goods have supported the development of these new crafts based economy. In addition, the spread of endogenous models of economic growth in the 21st century stimulated an interest in local resources, including heritage as a product (Musialik and Malik, 2020:174). These advantages were perceived in the context of place marketing, sustainable urban development, urban regeneration, tourism economics and creative industries (Musialik and Malik, 2020; Lillevold and Haarstad, 2019; Papadam, 2017; Lyon and Wells, 2012).

Cities can find arguments to attract visitors and inhabitants in a defined structure of their craftspeople network. A research on similar models could be done to identify success cases, developing a good practice guide for cities willing to work on their craft sector as a key for economic development and as a city branding strategy.

The study of crafts needs a dynamic approach

The characterisation of the sector done through this study gives light to patterns unknown until this moment. Now it is time to plan when it will be the next time that a similar study will be carried out in order to have information on the evolution of the market. Only with studies performed on a regular basis of every 3 to 5 years, is it possible to understand how the sector is changing. Finding the necessary resources so the study can gain on representativeness and amplify the scope is vital for developing useful knowledge for policy makers and craftspeople.

Helping to find the balance between producing and marketing

There is a difficult balance in the craft workshops between managing, producing and training. Cooperation agreements to brand the products, manage sales or finding new business opportunities could be explored so the effort is shared with complementary partners who have similar needs and channels for their products.

Fostering the symbiotic relationship between crafts and high added value industries

Crafts support highly developed, thriving and consolidated industries such as tourism, leisure or luxury. They are an expression of heritage, culture of territories and the identity of many cities. The businesses operating in the industries mentioned can offer their services to some extent thanks to the work of craftspeople who:

- Keep alive techniques.
- Restore heritage sites.
- Produce appealing objects to decorate interiors.
- Produce desirable objects for the visitors and locals to buy and collect.
- Have a workshop to visit and experience authentic and memorable moments.

To create a forum of discussion among a group of craftspeople; tourism, leisure, luxury and retail managers; designers, architects and artists; with a defined agenda around certain top to discuss, they can find cooperation opportunities that result in unexpected and profitable relations.

Appendices

A/ 01
Crafts categories

Meaning to include the different types of crafts, and aware that there could be more not listed here below, we would like to name those that we detect as established and emergent crafts categories. Some of them could even share territories. This is more a warming up exercise than a selective definition, the pursuit is to visualise the richness of an activity that connects materials objects with the user, embeds the identity of territories and their heritage and has a profound role in the wellbeing of the citizens/people.

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TYPES OF CRAFTS BY CONCEPTS

FOLK CRAFTS. Inspired in the traditions of communities, they convey the cultural identity of a territory or group. They are linked to utilitarian and decorative objects of those communities, and they often are part of rituals and customs of social or ethnic groups.

ARTISTIC CRAFTS. Unique or numbered pieces made with a pure aesthetic and/or sculptural purpose and very often or a high value. They don’t have utilitarian functions and may work on a conceptual and abstract realm. These pieces are made by craftspeople and artists highly skilled and sometimes with artistic qualification.

CONTEMPORARY CRAFTS. Hand-made production of objects that fuses the skills of craftspeople with design thinking applied to their processes, with the aim of reinterpreting and updating the aesthetics and uses of traditional objects.

ARCHITECTURAL CRAFTS. Disciplines involved in the preservation and restoration of heritage considering the historical and environmental point of view of building and spaces. They require knowledge of craft techniques and aesthetics framed in different contemporary and non contemporary art styles. These crafts may include the incorporation of new bodies to existing buildings considering their architecture and spirit.

LUXURY CRAFTS. Defined by the value and exclusiveness of their objects, this type of crafts is usually related to the figure of an “Author” or linked to a luxury brand. Here is appreciated the material, the process and the time (the time spent making an object but also to the process of perfecting necessary skills). Luxury craftspeople are particularly inspired by materials and how they can be manipulated, they are not so much concerned with practical solutions but with the extraordinary, non-essential and exclusive. It is also connected to the idea of collecting and long-term investment.

TECHNOCRAFTS. unifying the know-how of the craftspeople with the latest technology to produce non standardise objects, mechanising some parts of the production using modern machinery, robotics, and/or software, lowering the manufacturing costs, optimising the manufacturing and eventually adding new aesthetics.

RECYCLING-REUSING CRAFTS. Encompasses a range of techniques defined by the type of materials used (by-products, discarded objects, recycled materials) and the re-purpose of objects, which find a new usage and design thanks to the intervention of craftspeople.

TYPES OF CRAFTS BY MATERIALS AND PRACTICES

CERAMIC	GLASS	LEATHER	METAL	NATURAL FIBRES	PAPER/CARDBOARD
Ceramics Pottery Mosaics Tiling Brick making	Enamelling Engraving Blown glass making Fusing Casting	Shoes Saddlery Glove making Luthier (instrument making) Leather goods (complements) Fur trade Leather carving Millinery (hat making)	Fire armoury making Brass and copper Instrument making Knives and swords Forge Crafts foundry/smelting Blacksmith Tin plate crafts Metal carving Miniature making	Basket making Cordage, rope making Rope sole shoe making (espadrille making) Cork crafts Fibres plaiting and roping Weaver Furniture crafts Hat making	Cardboard making Bookbinding Paper making Puppet making

PRECIOUS/SEMI PRE. STONE & METALS, BONES, SHELLS	STONE / MINERAL	TEXTILES	VEGETAL / FLOWERS	WAX	WOOD
Jet jewellery making Custom jewellery Ivory working Fine jewellery Goldsmithing Silversmithing	Stone cutting Funerary stone working Sculpture	Rugs Embroidery Lace-making Prints Spinning mill Patchwork Knitting Crochet Glove making Feather mosaic Hat making Tapestry Weaving Dyeing	Flower arrangement Bonsai art Ikebana Dried flowers	Wax making Sculpture	Woodworking Vessel making Cabinet making Marquetry Imagery (religious sculptures) Luthier Toy making Modelling Polychroming Altarpiece making Chair making Carving Barrel making Lathing Puppets making

A/ 02

Methodological details

This study has been commissioned by the European Crafts Alliance and developed by the consultancy company ohayō during the months from January to April 2023. A group of two experts has validated, controlled and revised the approach, diagnosis, results and conclusions of the research.

The baseline of the research has been a definition of the sector and an attempt to establish its limits. Having a common and agreed reference, the framework is clear and also it is possible to start building a corpus collection that has started with this report on the European Market for Crafts and will be completed with the studies below:

- Analysis of the Resilience of the Crafts Sector.
- Research on business and production opportunities.
- Analysis of the integration of digital design and fabrication technologies on the crafts sector.
- EU Craft sector and the Creative. Europe cross-cutting priorities.

Img. Guilherme Stecanella © via Unsplash

The methodology applied to this study has employed quantitative and qualitative data collection methods to gain knowledge in the areas established in the objectives. Primary information (gathered ad hoc for this project) and secondary information (existing reports and other sources of information) have been considered. The geographic coverage of the the study for characterising the sector has been the European Union, establishing some reference markets in particular for the surveys. While the territorial scope to define the crafts' consumer of the future has been worldwide.

MARKETS OF REFERENCE FOR THE STUDY

To build a comprehensive profile of the European Crafts two groups of countries have been considered. The first group is composed of: Denmark, Ireland, Finland, Germany, Norway, Slovakia, Spain and Sweden. Every country/region selected represents a geographical and cultural area of Europe. Germany is representing the Central and North European countries, Spain is representing South European Countries, Ireland is representing the island's countries (excluding Iceland), Slovakia is representing Eastern Europe countries and the Nordic Countries (Denmark, Finland, Norway, Sweden) are representing the upper North European countries. The sample size has been distributed among the countries according to the size of the population that every country/region is representing. Craftspeople and crafts' related professional from these countries have been interviewed with the aim of deepening in the realities and situation of the sector. Statistics about the crafts' sector in every country, when available, have been also compiled.

The second group of countries is composed of: Belgium, Italy, Netherlands, Poland and Portugal. Surveys to crafts' consumer haven't been administered in these countries. However, craftspeople and crafts' related professional from these countries have been interviewed.

COMPOSITION OF THE SAMPLE AND PROFILE OF THE SURVEYS RESPONDENTS

Size of the sample: 820 respondents.

Composition: divided proportionally to the size in population represented by every country/region.

Profiles of the respondents:

- People aged 20-80.
- Residing in the targeted European countries mentioned above.

SAMPLING METHOD FOR THE SURVEY

As for the type of research and its scope it has been applied a convenience quota sampling, where the quotas have set a similar proportion to every main age segments.

The sample has been obtained with the help of crafts centres in the country and randomly with ohayō's means to guarantee the necessary diversity of opinions required.

IN-DEPTH INTERVIEWS: PROFILES OF THE INTERVIEWED

A total of 19 in-depth interviews to craftspeople working in Europe.

A total of 14 in-depth interviews to crafts related professionals living in Europe.

The complete list of profiles can be seen at the initial part of this report.

Profiles of the professionals related to crafts that have been interviewed:

- Government support officials: heads of crafts, representatives of associations and foundations
- Gallery owners
- Marketers
- Trainers and teachers of arts and crafts
- Consultants

CONSUMER TRENDS RESEARCH

It has been presented major consumer trends and consumption universes applying the methodology of Otō, the trends observatory of ohayō. Based on the "Trends Report on Crafts 2023: Materia et manus" and the study of lighthouse* cases identified by Otō, there have been depicted the profiles of emerging consumer universes including the attitudes, drivers and lifestyles associated to them.

Otō's methodology is continuous and circular and it is based in the signals of change detected in different sources. Its main aim is to detect the elements that trigger changes in attitudes and motivations. The lexical and semantic field of the new products and services is studied. It is analysed how designs rebuild people's environments considering new concerns. The process starts with an assessment of information gathered by the observatory. Then, every selected case is decomposed in attributes and they are linked to trends concepts. The reasons behind the appearing of these new products and services are explained. The studied cases are catalogued and organised according to industries, concepts, mega trends and countries. This material is used to settle the initial hypothesis and a list of questions to check. Besides, worldwide hub and hotspots cities are explored. Creative and professional circles of different industries are contacted to open discussion over the hypothesis and questions settled. These contacts feed the system with new cases that may confirm the hypotheses, pose new possibilities or point trends that are merging. The analysis above is complemented with the observation and analysis of urban movements in a series of cities where the trend effect is particularly interesting, such as Tokyo, New York, London, Paris, Milan, Johannesburg, Sydney, Bogota, Shanghai, Seoul, etc.

Further information about Otō can be found at: ohayotrends.com

A/ 03

Market size calculation

To calculate the size of the market a series of premises have been followed based on the sample of the survey to citizens living in Europe. These are:

Aged 20-70 years old.

Composition of buyers and non buyers:

Buyers: 85%

Non buyers: 15 % (Tentative future buyers: 95%/ Crafts rejectors: 5%)

*As a judgemental criteria of caution haven't been included in the calculation of the market size the tentative future buyers, keeping the proportion 85/15 buyers/

Img. Zhouxing Lu Lj © via Unsplash

Total population by regions represented by each country/group of countries:

Germany, representing Region 1: Central and northern European countries (approx. 122 million citizens).

Spain, representing Region 2: South European countries (approx. 134 million citizens).

Nordic Countries (Denmark, Finland, Norway and Sweden), representing Region 3: Upper north Europe countries (approx. 33 million citizens).

Ireland, representing Region 4: Europe's island countries (approx. 73 million citizens).

Slovakia, representing Region 5: East European countries (approx. 90 million citizens).

For this purpose it has been considered the EU-27 plus Norway, Iceland and the United Kingdom as addressable markets (453 million citizens).

PROCEDURE

Once it has been calculated the proportion of the total population of those that can be considered craft buyers in every surveyed country, it has been applied that same ratio to the total population represented by each of them. There it has applied a ratio of 60% and 75% to select the serviceable available market (SAM) out ot the total addressable market (TAM). Then it has been applied the average annual expenditure to every region to calculate the value of the SAM. (See table 7)

GERMANY

Represents Central and Northern European Countries: Region 1

France	Germany	Austria	Belgium	Luxembourg	Netherlands	**Total region 1**
67.842.582	83.237.124	8.978.929	11.631.136	645.397	17.590.672	**122.083.258**

SPAIN

Represents South European Countries: Region 2

Spain	Portugal	Italy	Greece	Malta	Cyprus	Croatia	Slovenia	**Total region 2**
47.432.805	10.352.042	58.983.122	10.603.810	520.971	904.705	3.879.074	2.107.180	**134.783.709**

NORDIC COUNTRIES

Represent the upper North Europe region: Region 3

Denmark	Sweden	Norway	Finland	Iceland	Lithuania	Latvia	Estonia	**Total region 3**
5.873.420	10.452.326	5.425.270	5.548.241	341.243	2.722.289	1.886.198	1.331.796	**33.580.783**

IRELAND

Represents the north Europe islands' countries (excluding Iceland): Region 4

Rep. of Ireland	United Kingdom	**Total region 4**
5.060.005	67.886.011	**72.946.016**

SLOVAKIA

Represents the East European Countries: Region 5

Slovakia	Czechia	Poland	Hungary	Bulgaria	Romania	**Total region 5**
5.434.712	10.708.981	37.846.611	9.660.351	6.948.445	19.237.691	**89.836.791**

REGIONS	**Total region 1**	**Total region 2**	**Total region 3**	**Total region 4**	**Total region 5**	**TOTAL**
POPULATION	122.083.258	134.783.709	33.580.783	72.946.016	89.836.791	**453.230.557**

ESTIMATION OF THE SIZE OF THE MARKET IN VALUE (EU-27 + 3)

	Total population of every country-region	Population aged 20-70 per country	Estimation of the potential size of the market in number of buyers (per country): 85%	% of the total population of the country or reference	Total population of the regions (R1 to R5)	Estimation of the potential size of the market in number of buyers (per region). Total Addressable Market	Applicable annual average expenditure per person. Total Addressable Market in value- €	Hypothesis 1: Estimation of the Serviceable Available market in number of buyers (per region) (60%)	Applicable annual average expenditure per person	Hypothesis 1: Estimation of the the Serviceable Available market in value per region (Euros)
Germany - R1	83.237.124	55.247.686	46.960.533	56 %	122.083.258	68.876.657	28.239.429.561	41.325.994	410 €	16.943.657.737 €
Spain - R2	47.432.805	31.799.446	27.029.529	57 %	134.783.709	76.806.341	23.272.321.254	46.083.804	303 €	13.963.392.752 €
Nordic countries - R3	27.299.257	17.391.892	14.783.108	54 %	33.580.783	18.184.684	8.965.048.969	10.910.810	493 €	5.379.029.381 €
Ireland - R4	5.060.005	3.247.263	2.760.174	55 %	72.946.016	39.791.199	9.748.843.660	23.874.719	245 €	5.849.306.196 €
Slovakia - R5	5.434.712	3.756.081	3.192.669	59 %	89.836.791	52.775.405	13.457.728.151	31.665.243	255 €	8.074.636.890 €
TOTALS	**168.463.903**	**111.442.368**	**94.726.013**		**453.230.557**	**256.434.285**	**83.683.371.596**	**153.860.571**		**50.210.022.957 €**

A/ 04

List of graphs and tables

GRAPHS

Graph 1: Number of buyer respondents by age of the sample
Graph 2: Composition of the sample of the buyer of crafts by gender
Graph 3: Composition of the sample of the buyer of crafts by age
Graph 4: Proportion of buyer respondents by occupation
Graph 5: Use of social media among the buyer of crafts
Graph 6: Proportion to the statements I would buy crafts if ... among non buyers of crafts
Graph 7: Proportion of answers for each type of craft bought within the last 12 months
Graph 8: Crafts bought within the last 12 months by country/region
Graph 9: Frequency of purchase in relative terms during the last 12 months
Graph 10: Proportion of crafts buyers according to expense ranges
Graph 11: Percentage of answers to the question "Where did you buy crafts?"
Graph 12: Percentage of answers to the question "Where did you buy crafts?" per country/region studied
Graph 13: Percentages of answers to the question "Where do you look for information when you want to buy crafts?"
Graph 14: Percentages of answers to the question "Where do you look for information when you want to buy crafts?" By country/region
Graph 15: Percentages of answers to the question "On which occasion did you buy crafts?"
Graph 16: Percentages of answers to the question "On which occasion did you buy crafts?" By country/region
Graph 17: Percentages of answers to the question "I buy crafts because..."
Graph 18: Percentages of answers to the question "I buy crafts because..." By country/region
Graph 19: Average annual expenditure in crafts by age
Graph 20: Average annual expenditure in crafts by occupation
Graph 21: Average annual expenditure by country/region in absolute terms
Graph 22: Adjusted annual average expenditure in relation to the GDP per capita index
Graph 23: Estimated addressable market size in number of buyers by region
Graph 24: Estimated addressable market value (billion of €) by region

TABLES

Table 1: Number of respondents by age
Table 2: Frequency of purchase and expense in relative terms
Table 3: I would buy crafts if ... Relative importance
Table 4: Frequency of purchase and expenditure in relative terms during the last 12 months
Table 5: Average annual expenditure in crafts by age and composition of the sample
Table 6: Average annual expenditure in crafts by occupation and composition of the sample
Table 7: Average annual expenditure in crafts by occupation in relation to the GDP per capita index
Table 8: Strengths and weaknesses of crafts sector
Table 9: Exporting: markets and barriers
Table 10: Opportunities and threats of the crafts sector

A/ 05

Glossary

Here below it can be found an explanation of some unusual terms used in the report and also the specific meaning of some common words that may have different meanings.

Consumption universe

The concept “consumer universes” comes from the trends research field. These sketch the profiles of a future citizen-buyer that has already incorporated the new social, cultural and political paradigms of their time. This methodology allows for the depiction of the buyer of the future. They are the embodiment of a trend. A consumption universe profiles a cast of future buyers each according to their values and motivations. How do they live? How do they eat, dress, buy or spend their time? How do they relate to the crafted product?

Craftsperson

Professional artisan, highly skilled in a discipline that involves mastery in the techniques and treatment of materials such as wood, ceramics, glass, metal, textiles, leather, etc. where there is usually a high degree of hand-made work or and personal involvement in the design and production process.

Craft experts

Professionals who develop their careers as:
Government support officials: heads of crafts, representatives of associations and foundations

- Gallery owners.
- Marketers.
- Trainers and teachers of arts and crafts.
- Consultants.

Lighthouse case

Study case (product, service, business model, citizens initiative, project, etc.) that explains clearly the concept behind a certain trend and/or consumption universe particularity.

Portfolio career

To make a living by dividing your time between several, often unrelated, tasks, jobs or projects.

Serviceable available market (SAM)

Portion of the market that it is possible to acquire based on a specific business model (target). It is part of the total addressable market.

Total addressable market (TAM)

Total market for the product of a sector.

Value proposition

Promised proposed by businesses and organisations that connect to the beliefs, desires and lifestyles of the individual customer. Used here for the concepts proposed to link crafts with the driving forces of behaviour for each emerging consumption universe.

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