

THE CRAFT REPORT 2020

'The times they are a-changing'

Third year of Craft Report

ICHF Events



The Craft Report 2020

'The times they are a-changing'

1. Reality check
2. Mood of time favours craft
3. Audience growth
4. Capitalising on audience change
5. Sustainability implications



Make growth happen!

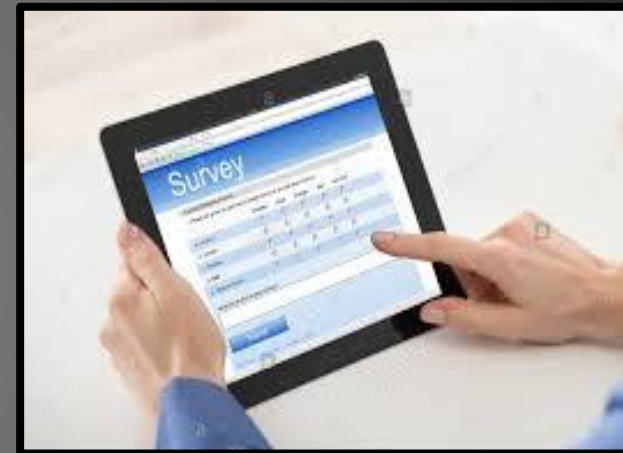
Report approach growing and evolving



70 face to face interviews



6 Industry figures



Over 3,000 keen crafters

10,000 crafters over past 3 years



Wide variety of craft disciplines



Oodles of talent



Poor trading across the board

fastFT UK retail sales

+ Add to myFT

UK retail sales suffer longest contraction since records began

Weak consumer sector adds to pressure on Bank of England to cut rates



High street gloom continues as fears grow over UK economy

Retail sales fail to rise for record fifth month in a row in December,ONS

John Lewis boss quits as chain warns it may ditch bonus

Department store chain and Waitrose owner says dip in key Christmas sales dented profits

- **Decisions facing John Lewis as it tries to halt fall in profits**
- **Nils Pratley: John Lewis is not in a crisis - it has failed to adapt**



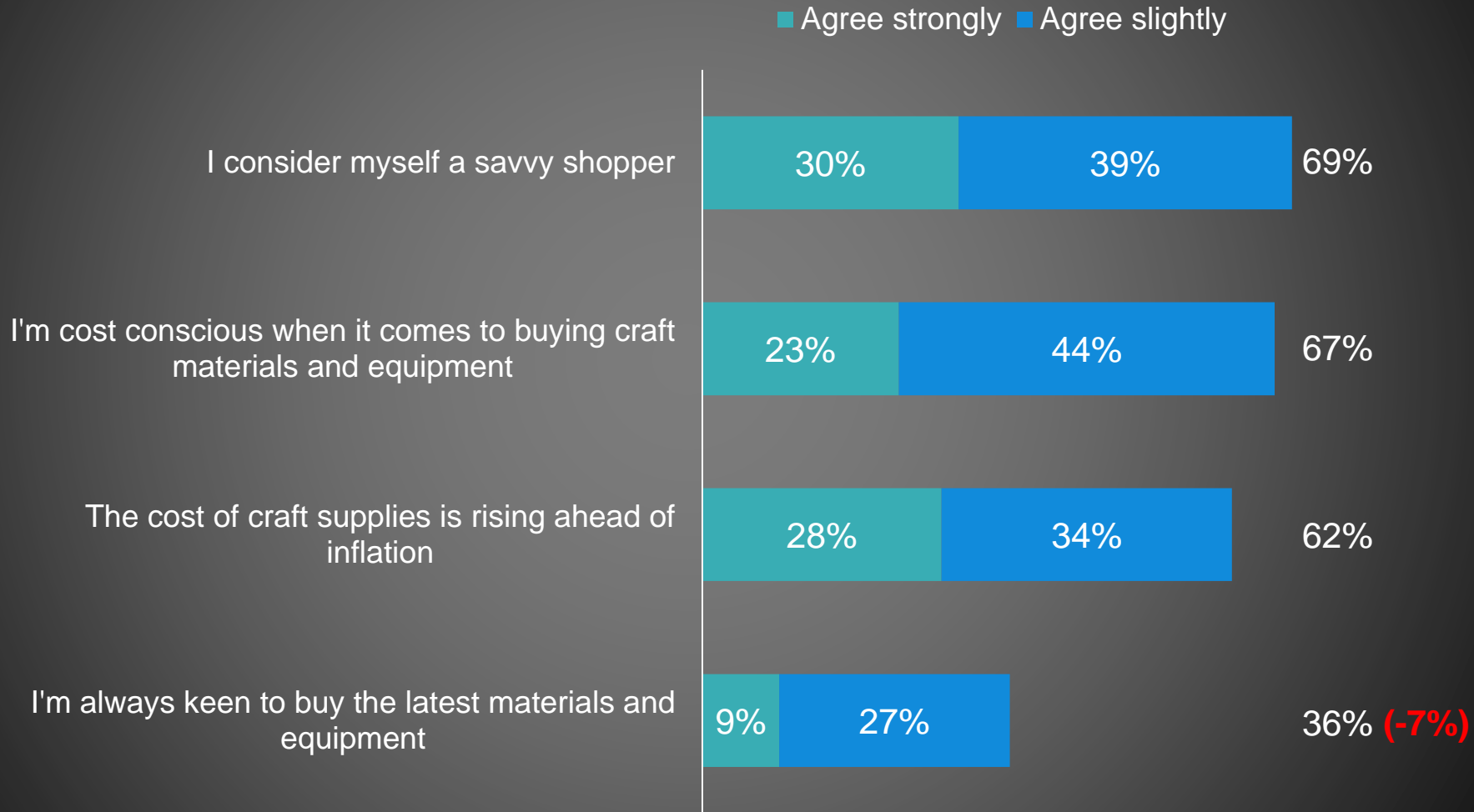
Household income under pressure



2018	2019	2020
£33,800	£35,300	£33,300

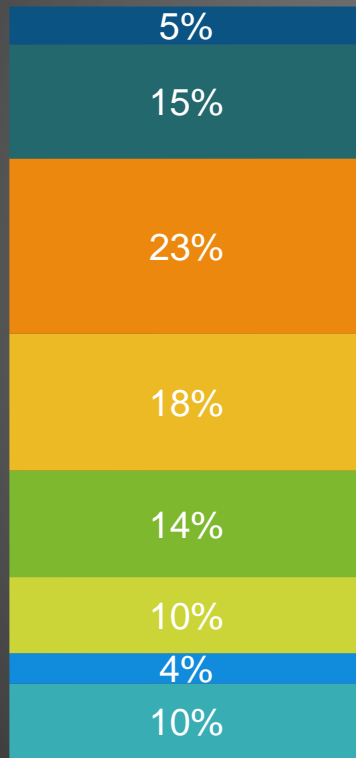
Average household income
lowest for 3 years, 6% down on 2019

Which is having a knock-on effect on craft



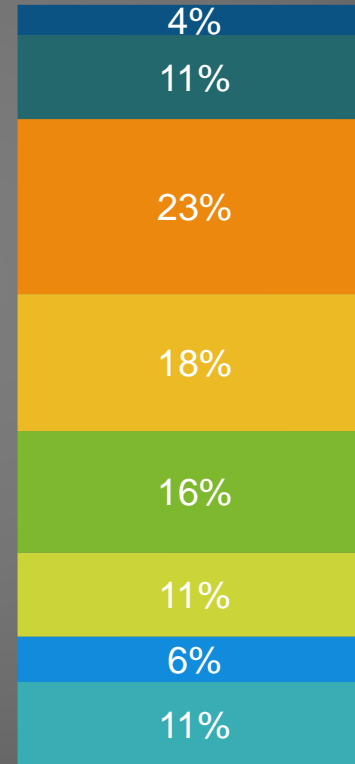
Average monthly spending down

£34.20
Down 9%



2020

£37.70

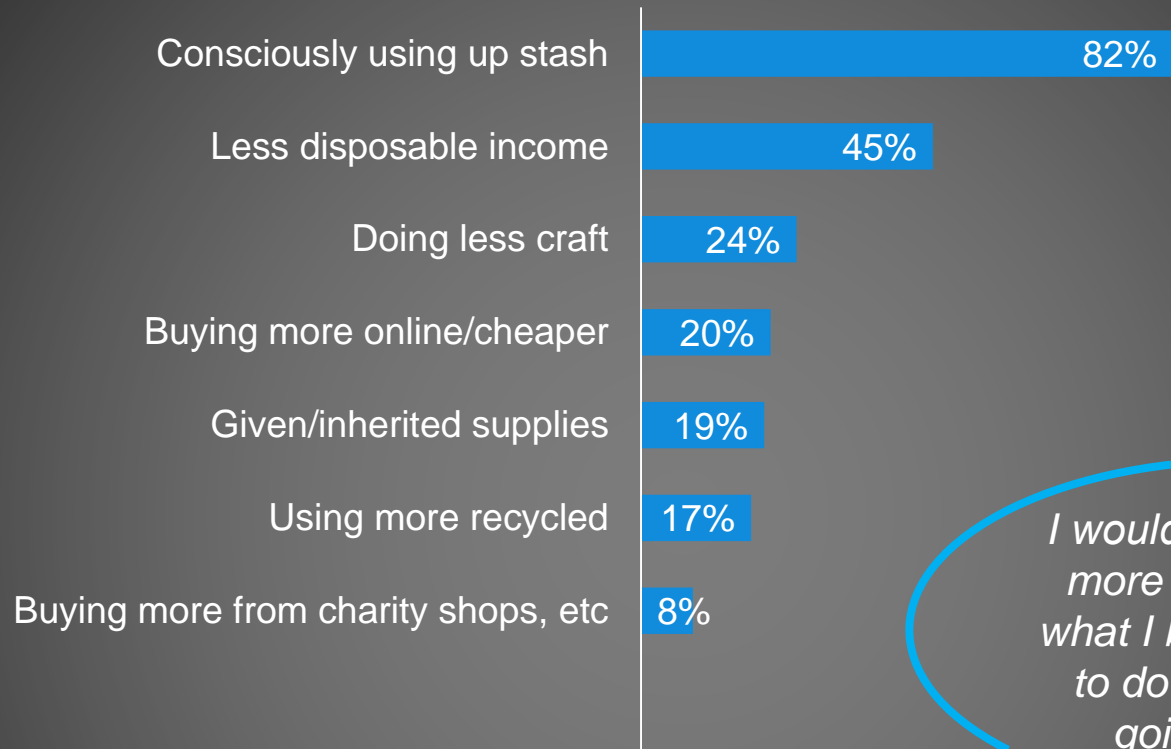


2019

Mean

- Nothing
- <£10
- £11-£20
- £21-£30
- £31-£50
- £51-£100
- £100+
- Don't know

Why spending less?



I would say I'm being more considered in what I buy. Am I going to do it, when am I going to do it?

It is just not having the money to do it. Bills go up but the money coming in is the same. There isn't one thing like Brexit that you can blame. It is an accumulation.

But there is audience growth



14.6m

2017



15.1m

2019

TGI – the UK's largest consumer research panel

Hypotheses for audience growth

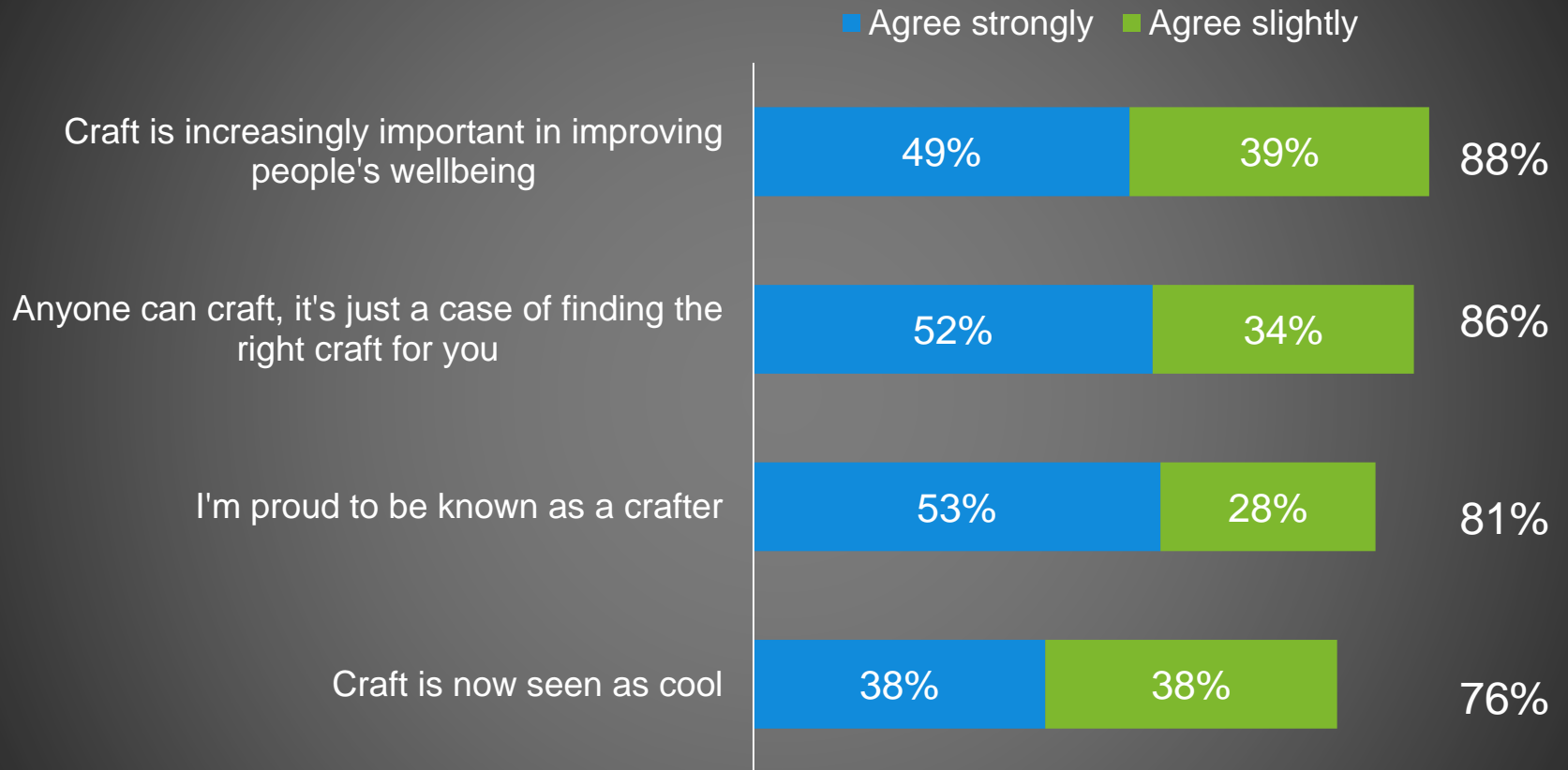


1. 'Normalisation' of craft
2. More community based
3. Medical endorsement
4. Innovation
5. New, younger crafters

'Normalisation' of craft



Socially acceptable



Social currency vs social stigma

It is fashionable now and okay to sit and knit in the pub. It is okay to be crafty. Ten years ago, you were the nutter on the bus knitting!

It's a conversation starter, like when you are on the train. It's surprising how many people craft. You wouldn't think so to look at them!

I am now hooked. If I can't take my knitting I am not going!

I think some people at work are jealous that I have found a hobby that I absolutely love.

Appetite for clubs and groups

60% belong to any group/club
(41% belong to a real life one)



28% would like to join
a real life group/club

39% don't know
where their nearest
group/club is

Benefits of online groups

Online groups:
31% belong
14% like to join

I belong to a group where you can put your things on to be discussed. If something is really awful, then someone will tell you.

Book folding groups I belong to, they post free patterns for you to fold.

A group I belong to we are trying to make our own dyes. Using beetroot and onion skins.. it started as an online chat group, but we were all in the same area, so we started a group up. Our friendship has blossomed through craft.

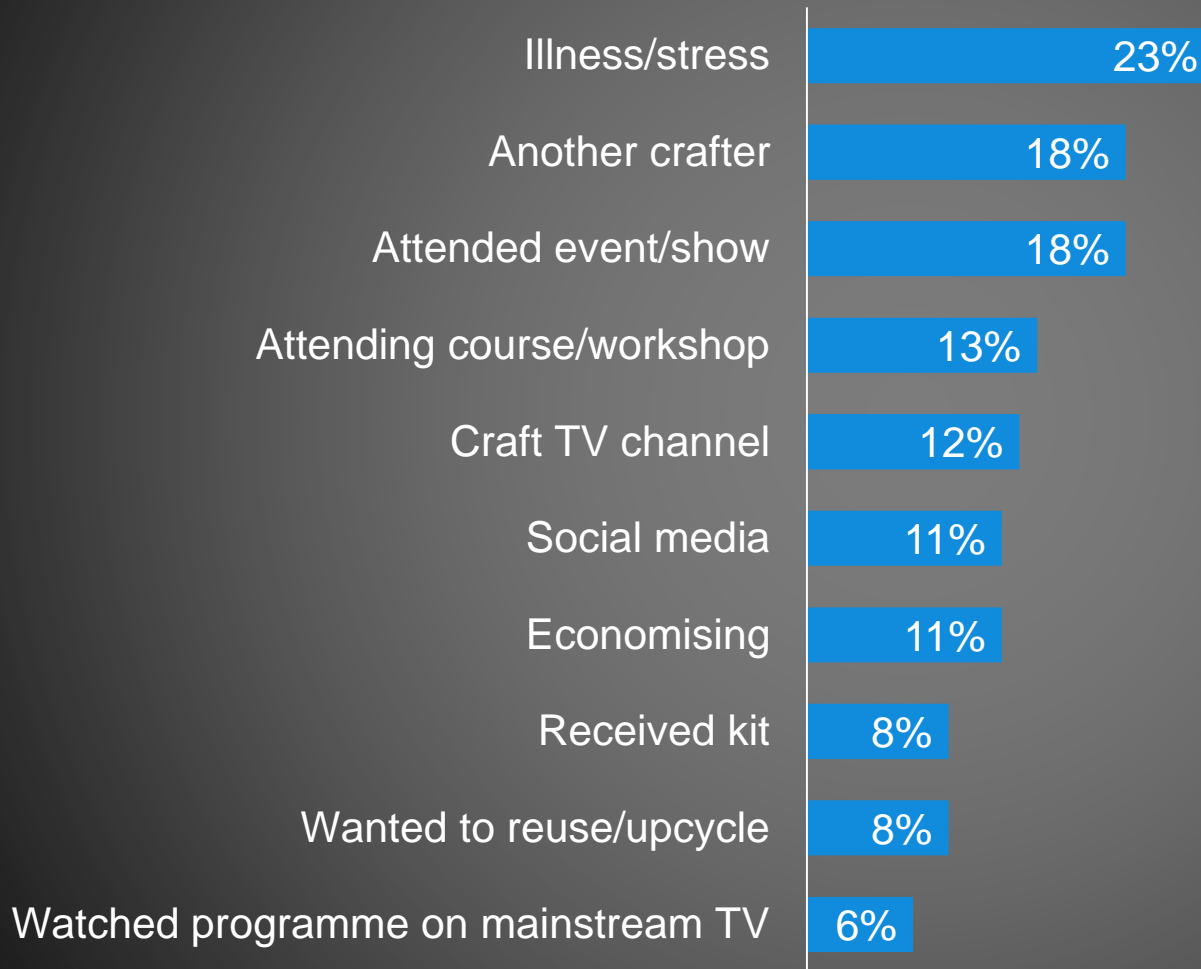
Having an online platform helps us to share news articles, things we might not have come across.

One my mum is into, they trade stencils, things like that, they swap things.

Craft is good for you

There was a study for NHS staff, they made them knit for 20 minutes in their lunch break, they measured their anxiety and stress levels, before and after, for a couple of months. They found that anyone who knitted on their lunch break for 20 minutes was substantially less stressed at the end of their 12-hour shift. They were much calmer and generally had better mental health. It has amazing therapeutic benefits. Very relaxing.

Reasons for starting to craft



Base: New crafters in last 5 years

Medical profession influence

Professional recommenders	% of crafters who have been recommended to start crafting by professional
GP/health specialist	4
Occupational therapist	2
Other	4
Any of these	10 (New crafter 20%)

NHS : 5 steps to mental wellbeing



1. Connect with other people

2. Be physically active



3. Learn new skills

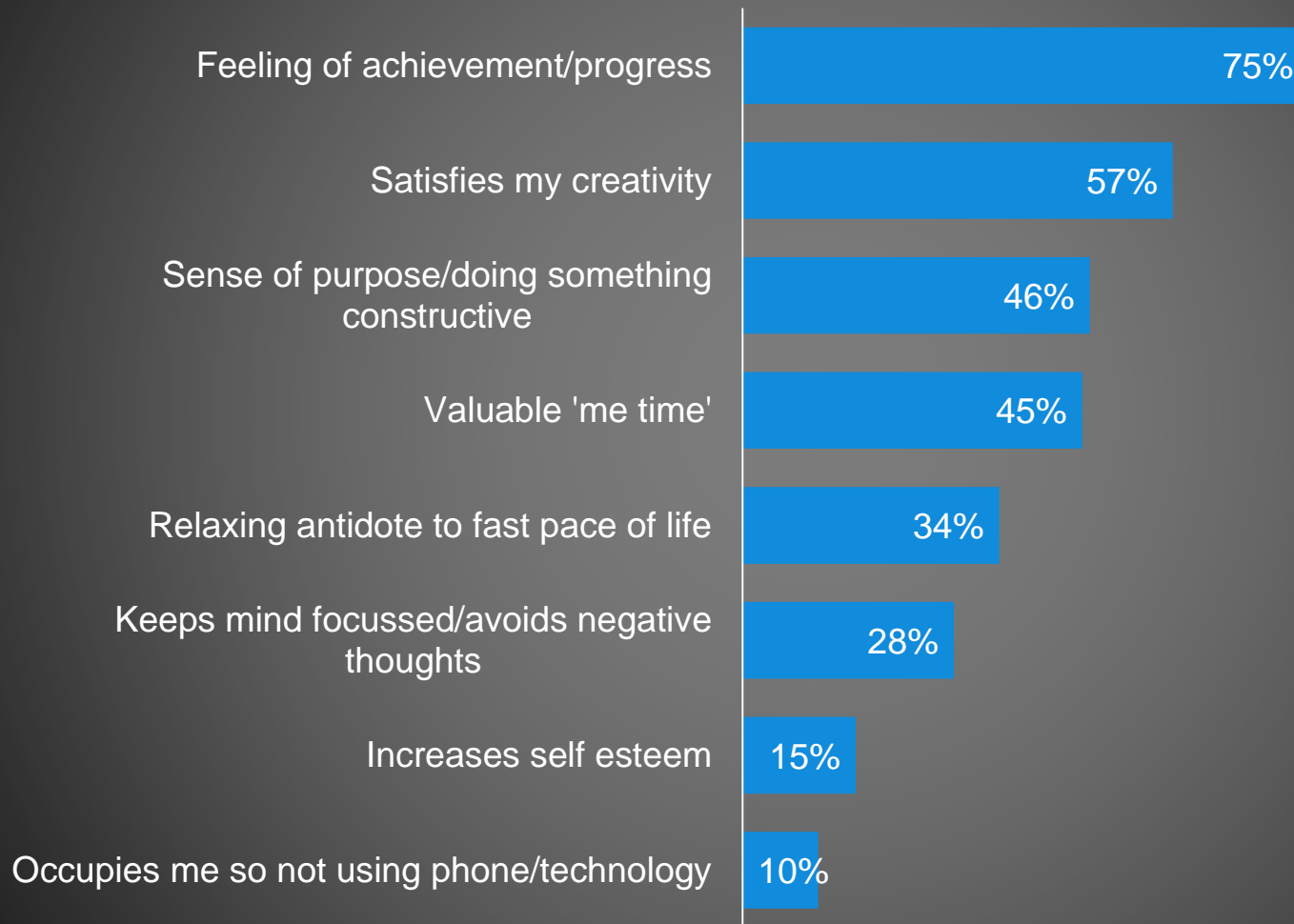


4. Give to others



5. Pay attention to the present moment

Top 3 wellbeing benefits of craft



Wellbeing benefits of craft

During the period I wasn't working, you reach that depression stage where you feel you are not contributing to society or to anything. So, to be able to produce something and see it all the way through to the end product, it gave me the self confidence that I can achieve something. Although it might be small, I had achieved something.

Top 10 crafts consistent with last year

1. Knitting
2. Home sewing
3. Papercraft
4. Cross stitch
5. Embroidery/tapestry/
other needlecraft
6. Crochet
7. Fashion sewing
8. Quilting
9. Jewellery/beadcraft
10. Art
11. Cake decorating
12. Colouring in
13. Upcycling
14. Felting
15. Children's craft
16. Mixed media
17. Flower arranging
18. Calligraphy
19. Modelling
20. Macramé
21. Glasswork
22. Candlemaking
23. Weaving
24. Marbling
25. Pottery/ceramics
26. Mosaic
27. Wood
28. Pyrography
29. Soaps/beauty products
30. Silver clay

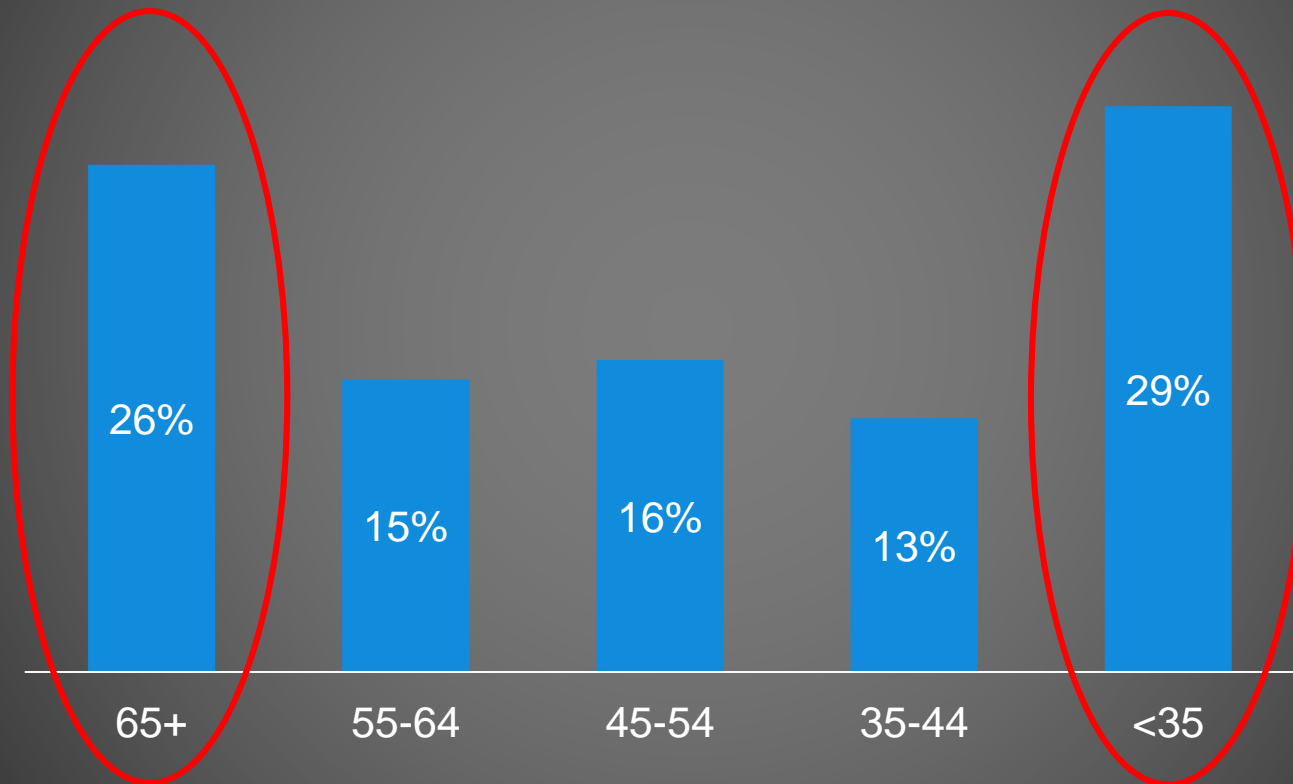
Overall size of opportunity (ever + future)

Over half audience (= c7.5m)	%	Over quarter of audience (= c3.7m)	%	Over 10% of audience (= c1.5m)	%
Knitting	66	Fashion sewing	43	Mixed media	23
Home sewing	60	Quilting	42	Glasswork	23
Papercraft	53	Jewellery/beadcraft	39	Flower arranging	22
Crochet	53	Art (painting/drawing)	36	Children's craft	20
Embroidery/tapestry/ other needlecraft	52	Cake decorating/ sugarcraft	33	Pottery/ceramics	18
Cross stitch	51	Upcycling	33	Candle making	17
		Felting (wet, needle and nuno)	33	Modelling (clay/Fimo)	16
		Colouring in	27	Macramé	15
		Calligraphy	25	Weaving	15
				Mosaic	14
				Working with wood	14
				Marbling	12
				Pyrography	11

Crafter image



Bi-polar age profile



Younger audience characteristics



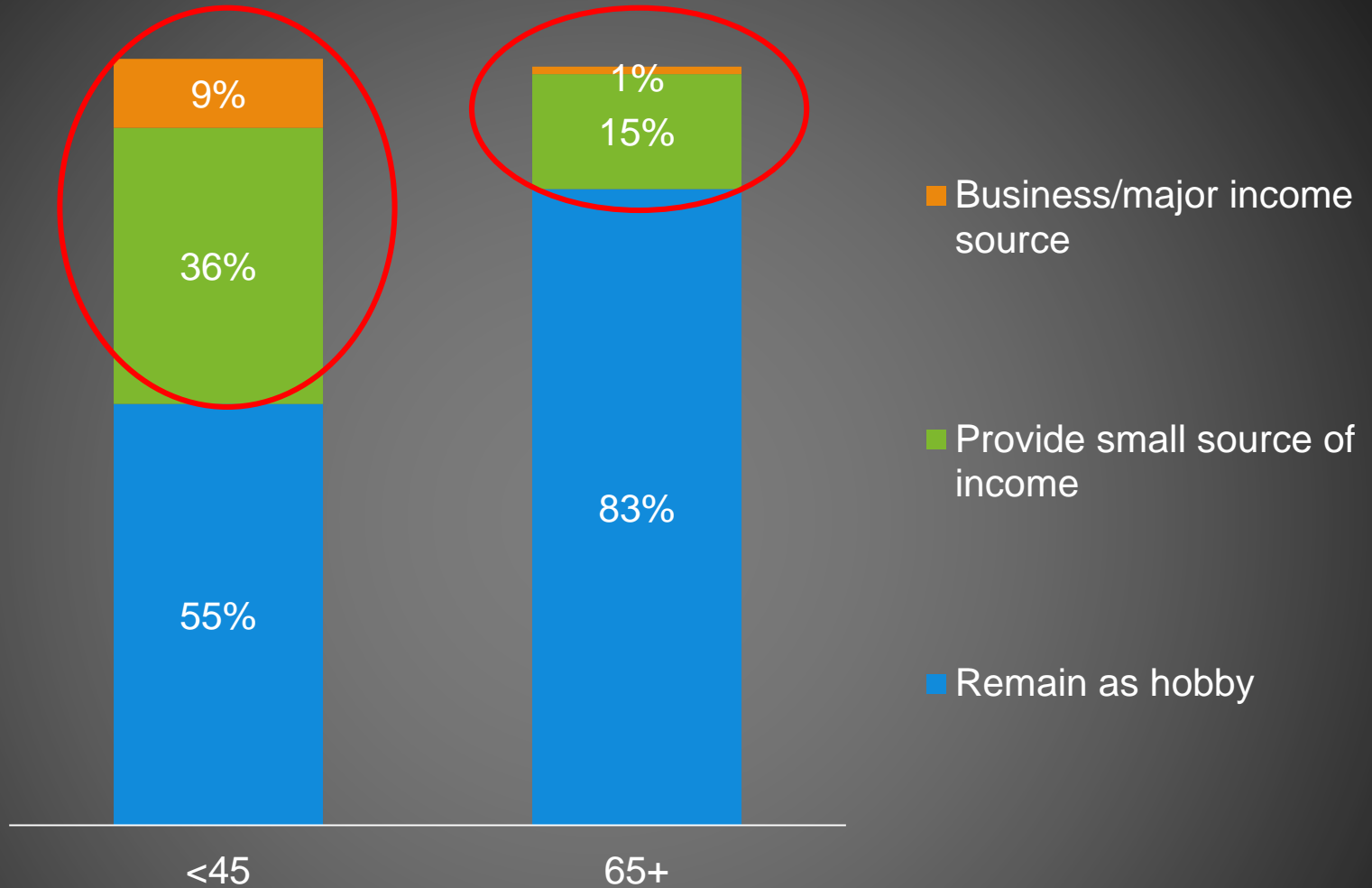
- Working
- Over 40% better off
- 1 in 3 started due to illness/stress
- More experimental (number of crafts tried/on list)
- More commercial
- Twice as engaged with social media
- Follow significantly more influencers (5 x as many)
- More into online groups
- Buy twice as many craft kits
- Been shopping online longer

Attracting a younger audience



1. Website
2. Social media
3. Styling
4. Wellbeing

Business potential



**Average monthly spend
on supplies = £73**

Not yet reached full potential



Growing the market



1. Innovation
2. Shopping/routes to market
3. Connections
4. Sustainability

Increasing appetite for experimentation

	2020	2018	<45's	65+
Average number crafts ever participate in	6.8	6.6	7.5	6.5
Average number crafts on wish list	2.6	2.3	3.3	2.3
Total	9.4	8.9	10.8	8.8

Arts they are keen to try



Acrylic pouring 24%

Printing 22%

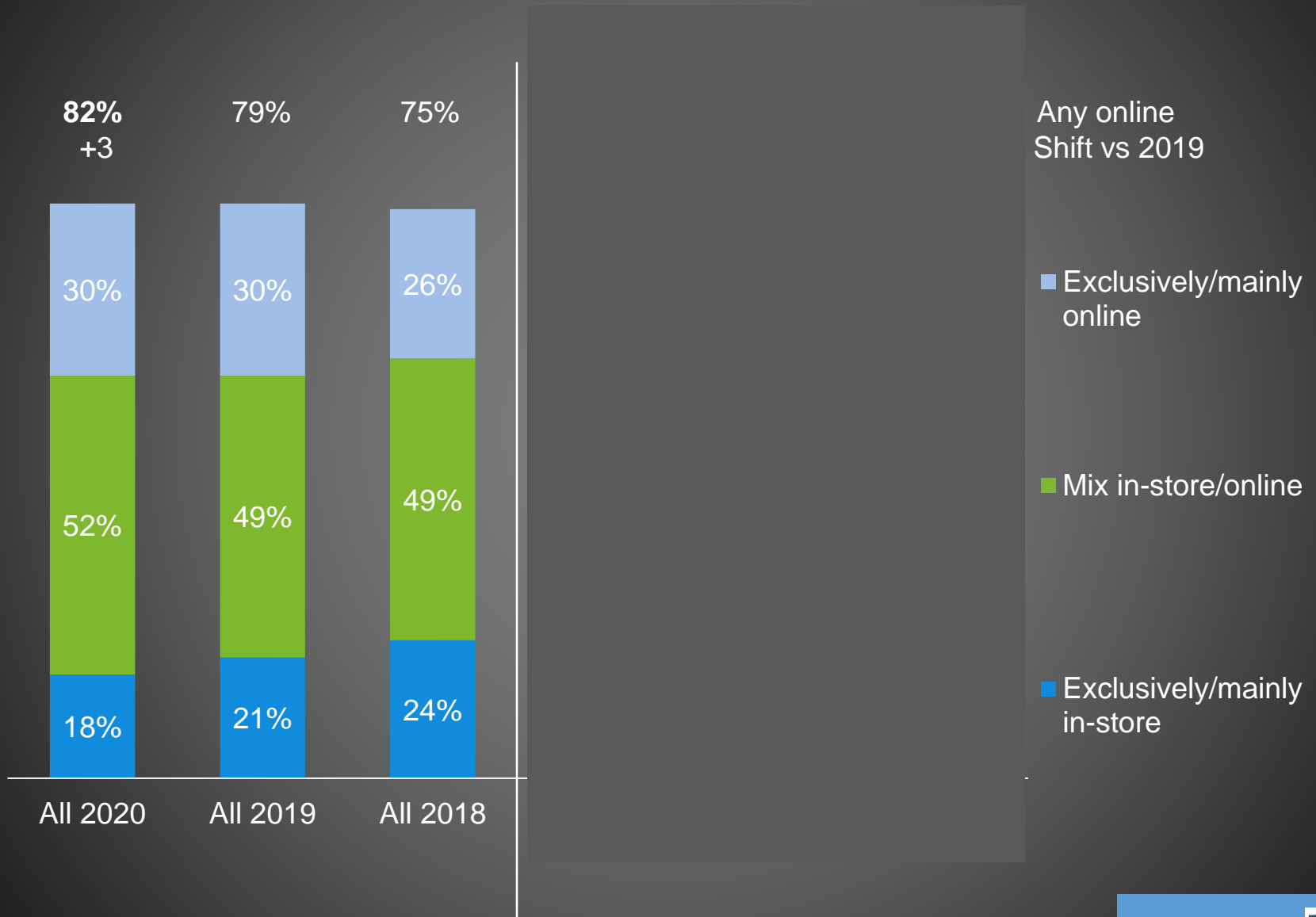
Mixed media 19%



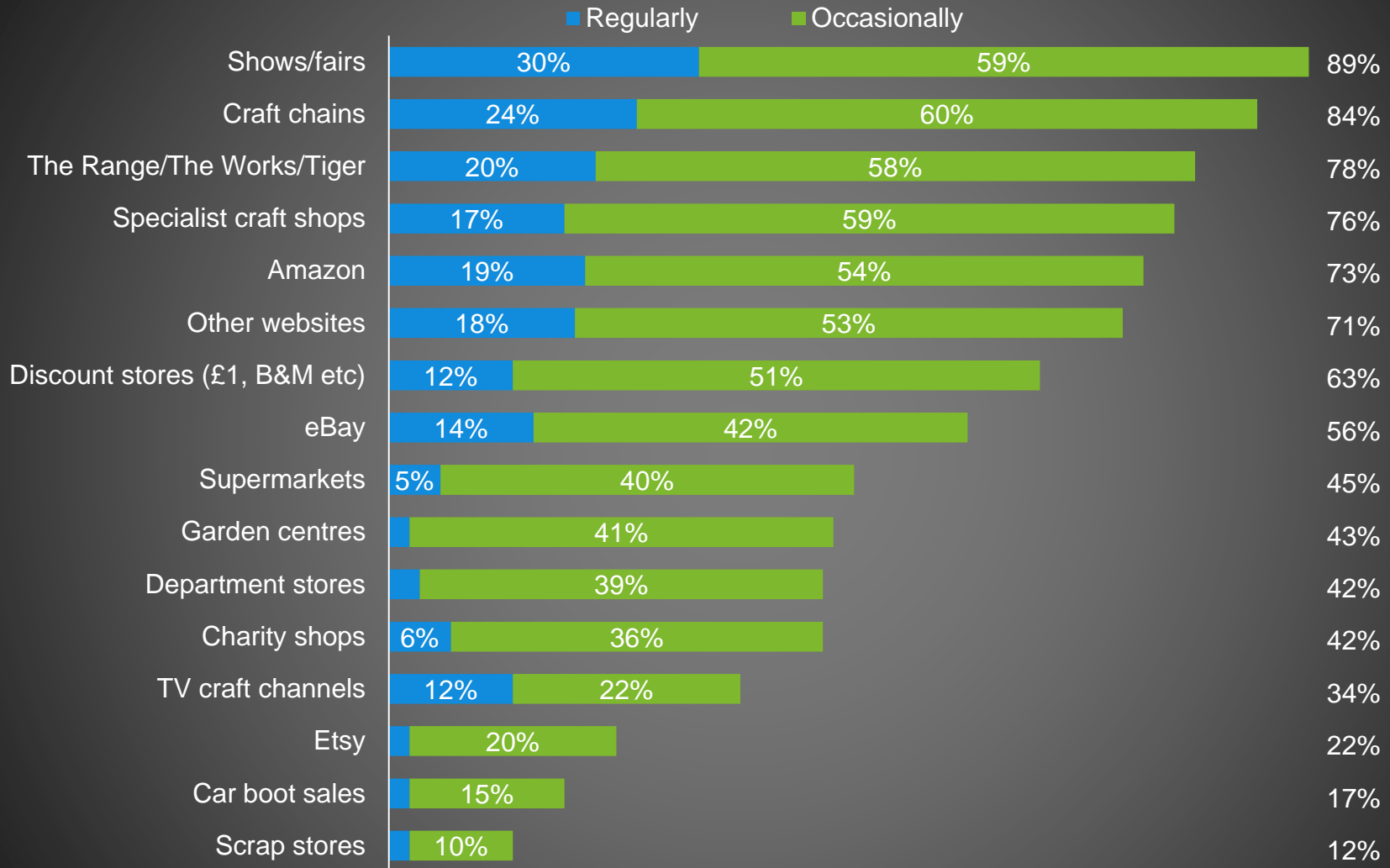
Painting 17%

Drawing 16%

Move to shopping online continues



Purchase frequency by source



Putting bricks and mortar into perspective

70% still shopping in-store

Craft stores ranked 3rd in sources of inspiration

Craft retailers top the list of influencers on buying supplies

Average monthly spend £22.80

Average monthly spend

Those shopping
mainly/exclusively
online

£47.70

Those shopping
equally in both

£30.40

Those shopping
mainly/exclusively
in store

£22.80

Becoming a destination outlet

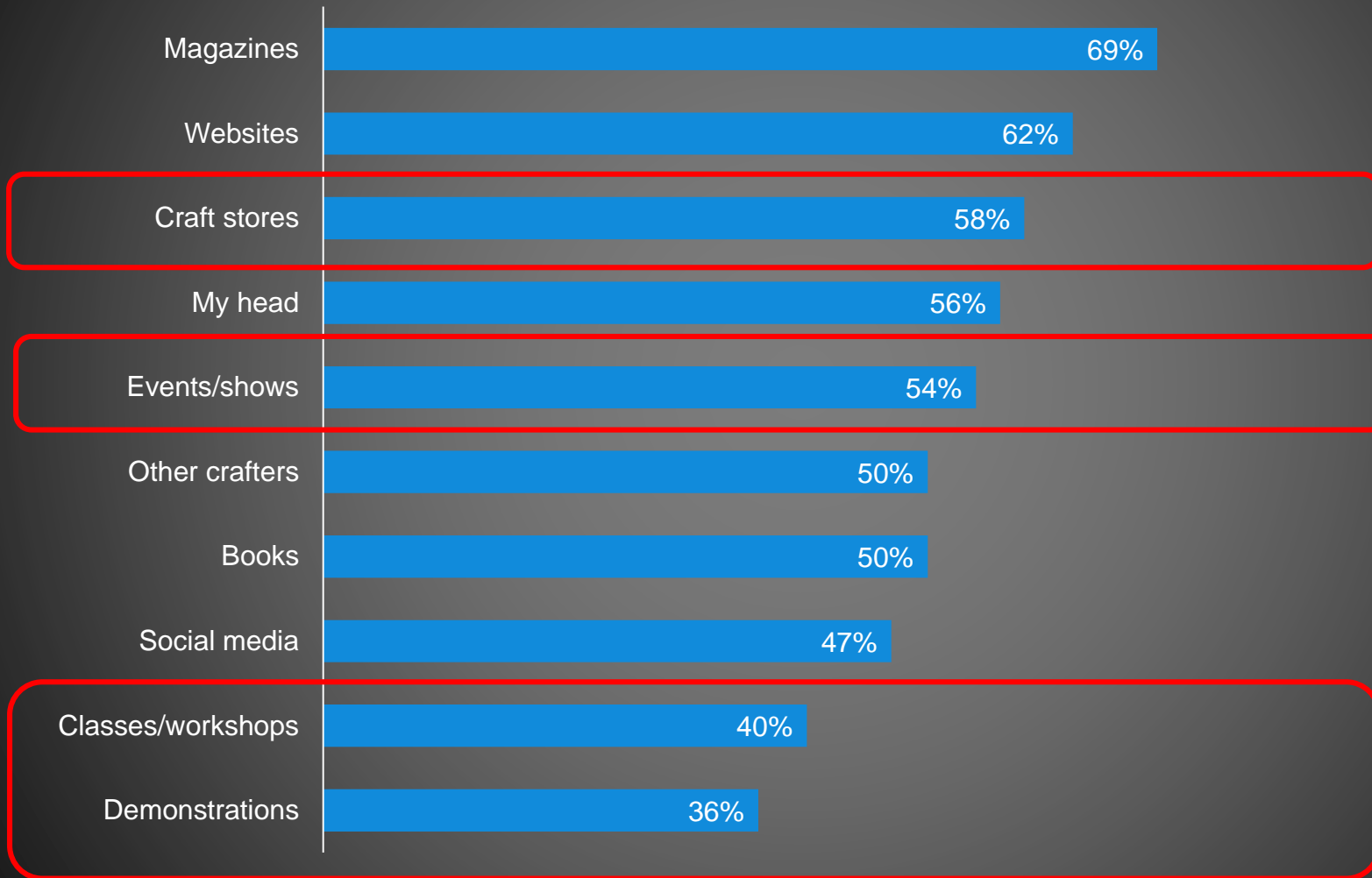
1. The experience
2. You!
3. Reasons to visit
4. Workshops/classes
5. Groups



Awareness is key

*Crafting is two
separate hobbies.
One is buying and
one is making!*

Top 10 sources of inspiration

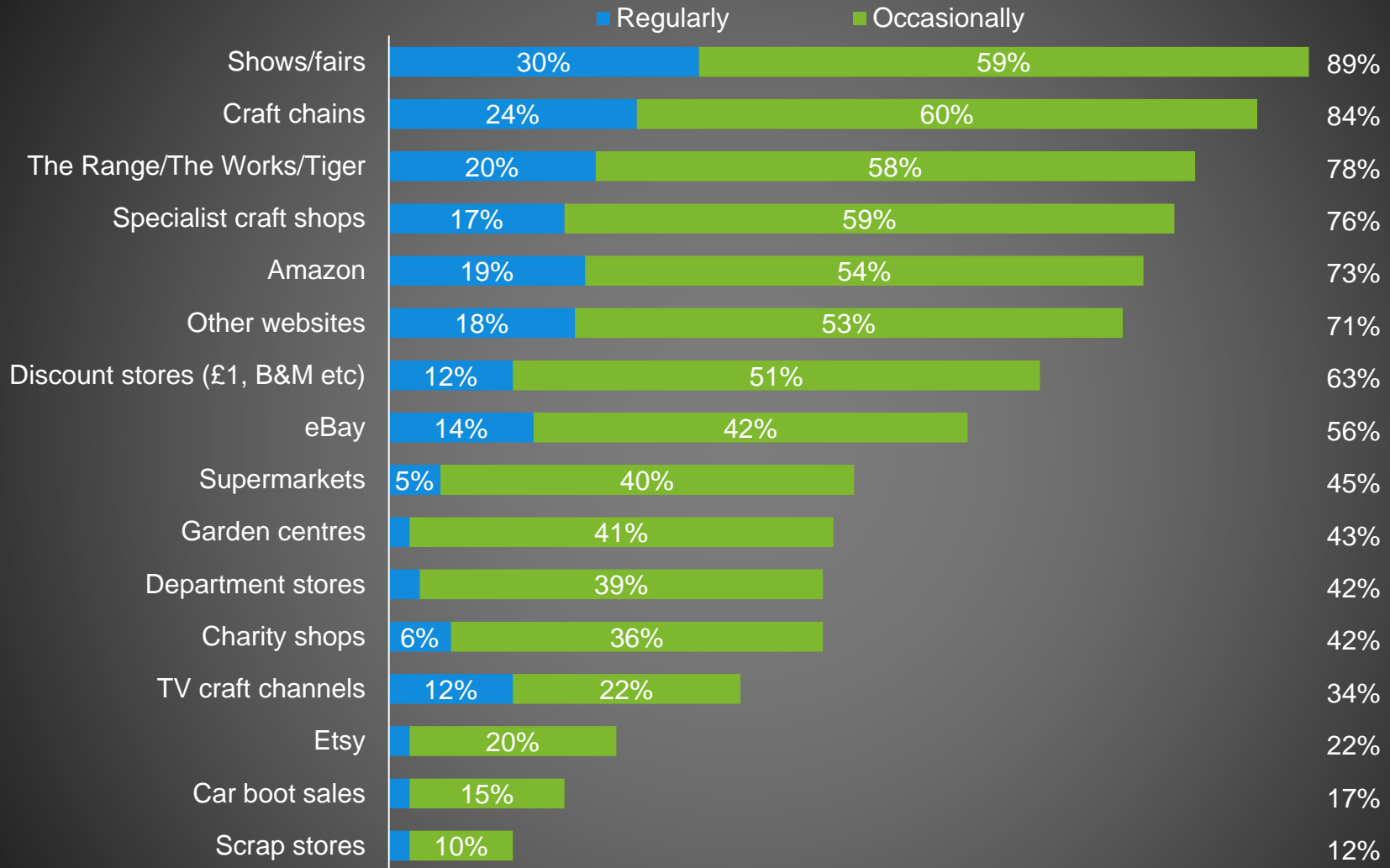


cont....

Learning sources

	2020 %	2018 %
Watch online video	85	83
One-off workshop	65	65
Course	44	46

Purchase frequency by source



Shopping at craft fairs

You go to one demonstration and think I will have one of those, then you go to another and another and before you know it £100 has gone.

You have to pay to go in. So, having paid, I am damn well going to buy something.

Craft fairs are quite big now too. Someone sits there showing you what you can make with their products which encourages you to buy.

A demonstration is like a live shopping channel in ten minutes you are convinced you have to have one.

I will save my craft money to spend at a big craft fair. Because there will be new things there. You can touch and feel it.

But..... innovation and display are key

Kirsty's Christmas show had so many different crafts. Things I had not seen before. I was very inspired by her show. I don't come here and see that.

This should be the window of craft, but it is not.

Feels like it was the same old things. Nothing grabbed my attention as new and exciting.

There are not many demonstrations going on either

We wanted to do a make and take but we couldn't get near a stall. We didn't get a chance to have a go

A week ago I couldn't get booked onto any. Today I have asked around and it is still no.

New routes to market

	Total (3148) %	<45 (202) %	65+ (1326) %
Going on a crafting mini-break	59	62	53
Attending a craft festival	52	72	44
Attending a craft party	38	54	31
Hiring craft equipment to try out prior to buying	26	40	18
Setting up a local craft group	19	25	15
Taking out a subscription for craft kits	13	33	8
Encouraging workplace to set up regular craft activities	8	24	2

The power of social media



47% quote social media as a main source of inspiration
(69% <45)

Pinterest most widely used across age groups

Instagram has strong bias to <45's

Social media



It's better to do one thing well
than 5 things badly!

Do your research and analyse



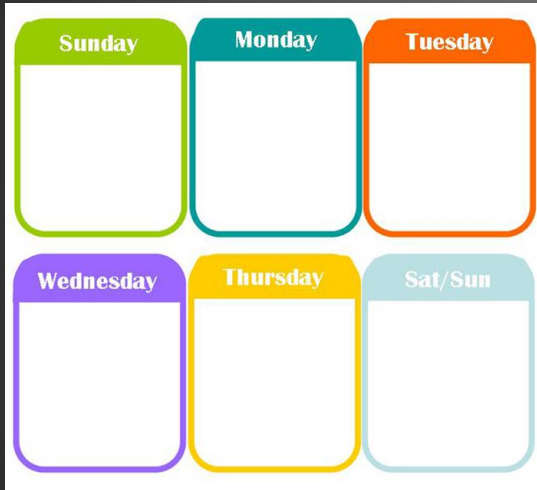
Why do I like it?

What do I get out of it?

How does it make me feel?

How can I use it to help my output?

Plan your content.....e.g.



Monday: Introduce a new material/craft

Wednesday: Q&A/Problem solving

Friday: New project/Step by step

Influencers



Benefits of following influencers

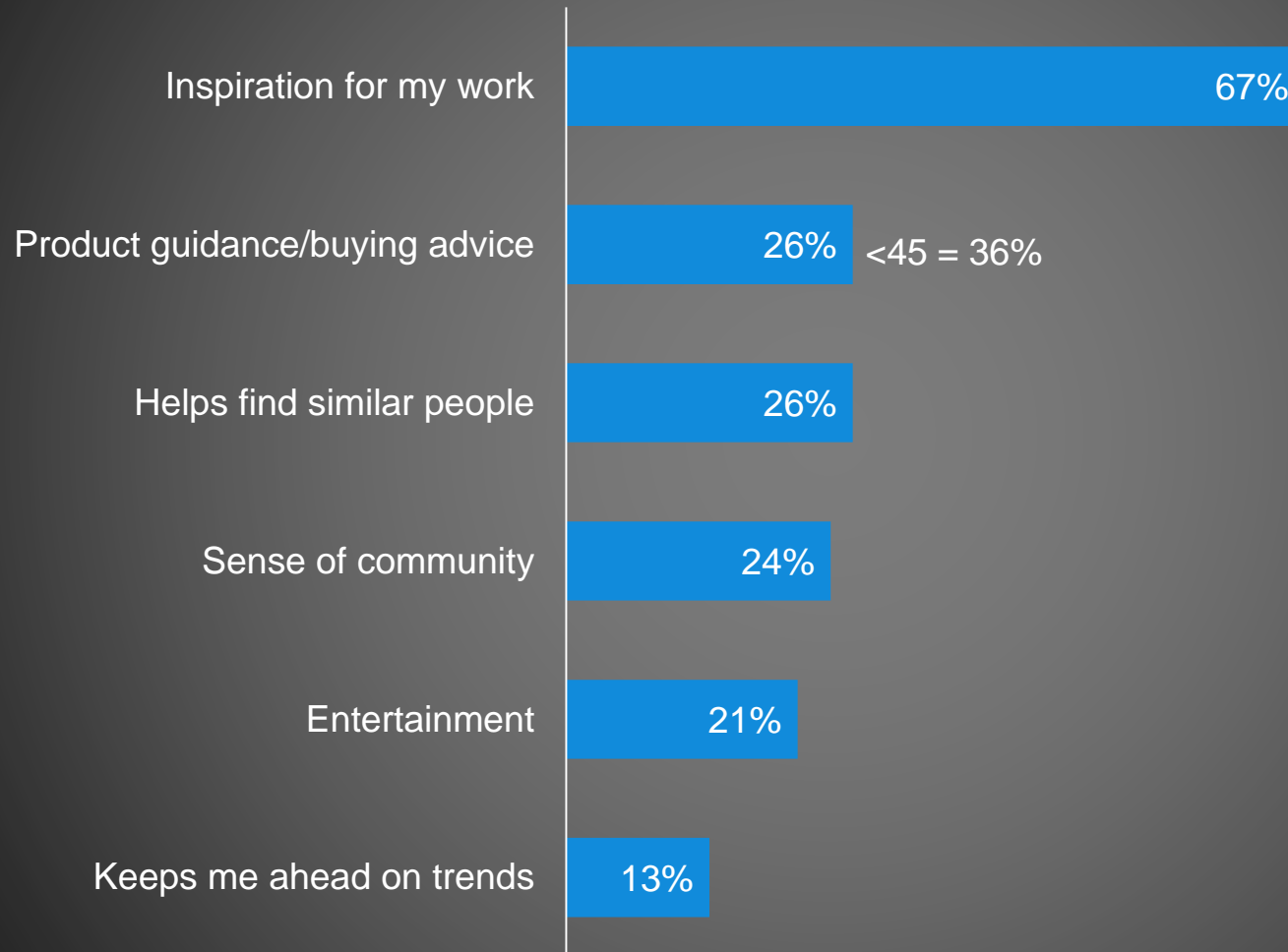
It is an important element to see part of that person. Seeing how they came to do a specific project. It is nice to have a human story behind it.

I like being recommended stuff but not being told to buy stuff.

For me it is more individual people showing their work. They might say what products they have used. I bought pens after seeing what they used.

By seeing their personal lives, makes them more trustworthy. You see things similar to your own taste.

Benefits of following influencers on social media



Sustainability



Frequency of conducting upcycling projects



27%
into upcycling

4 in 5 of upcyclers
doing more
upcycling

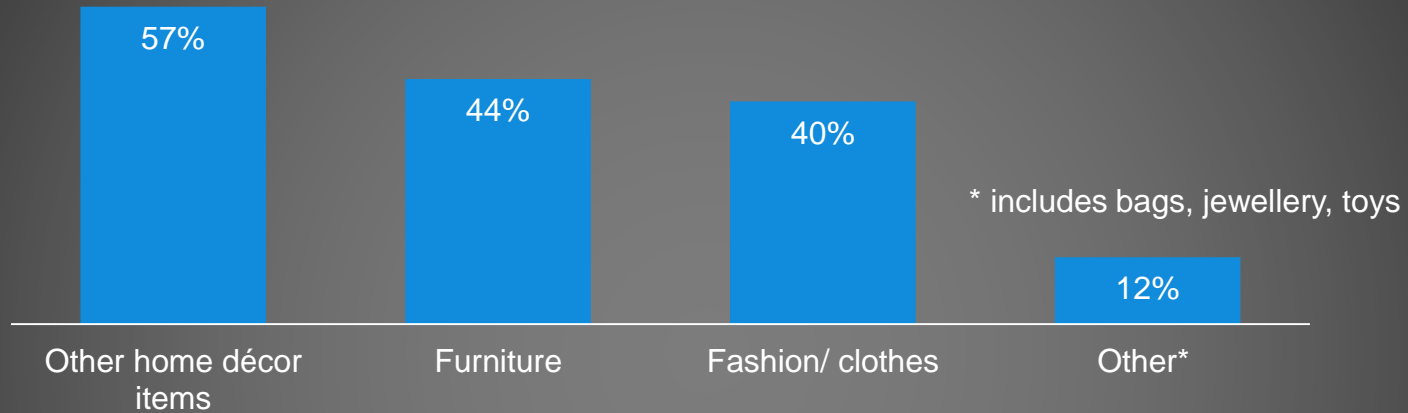


There has been a television programme. Upcycling has come from certain programmes. It feeds itself and becomes a trend



There is a lot about reusing stuff around you. Encouraging you to re-use and upcycle. The throwaway disposable culture is being highlighted more

Upcycling projects



**Average spend on buying new craft materials
to complete last upcycled project
£21**

Upcycling – in their own words

I bought a chest of drawers online last night to paint. I am going to Pinterest it all. It will be my first project. I will buy paint and new handles.

There has been a television programme. Upcycling has come from certain programmes. It feeds itself and becomes a trend.

My friend took apart her old bed and made trellises for the garden, spray painted them purple.

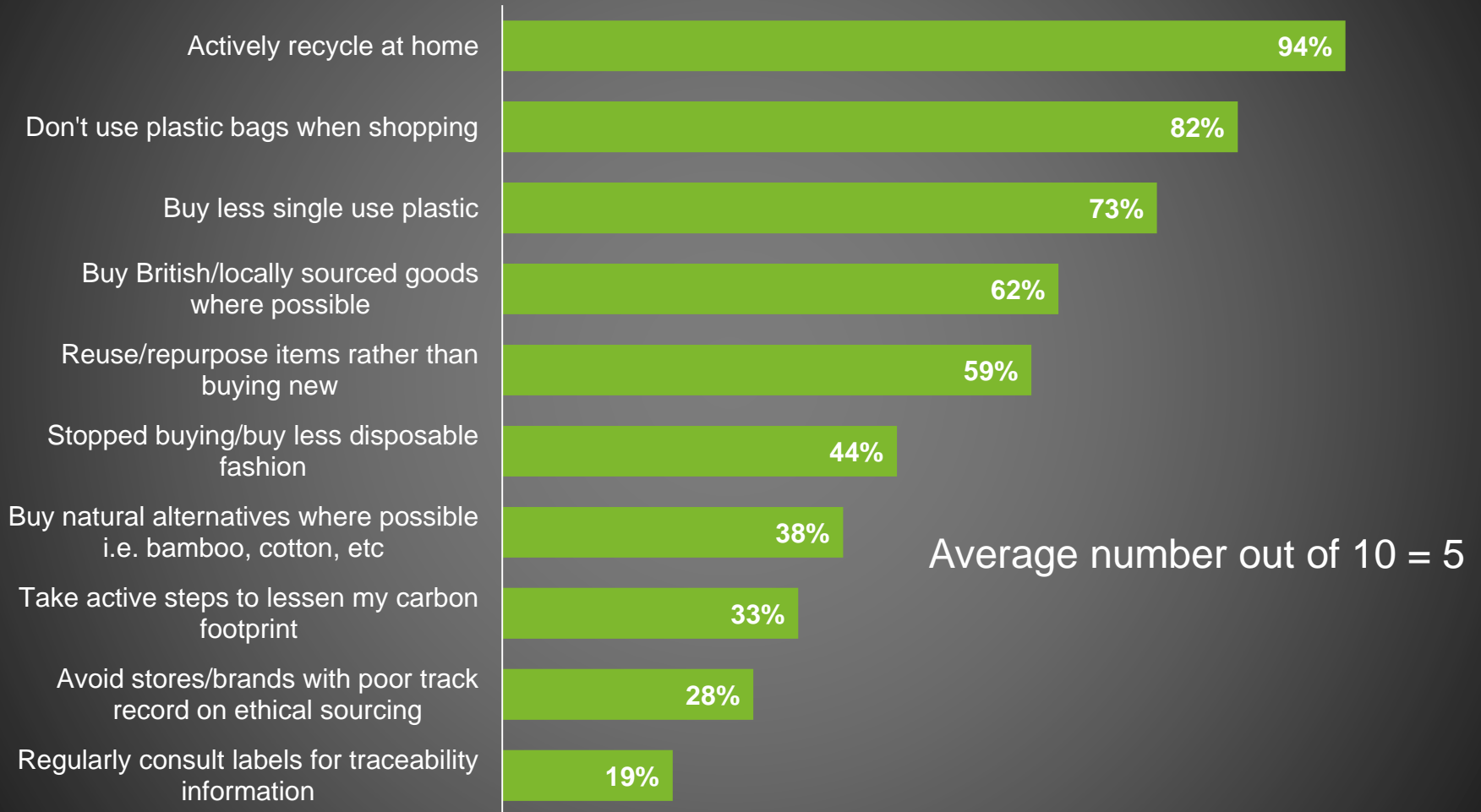
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Sustainability

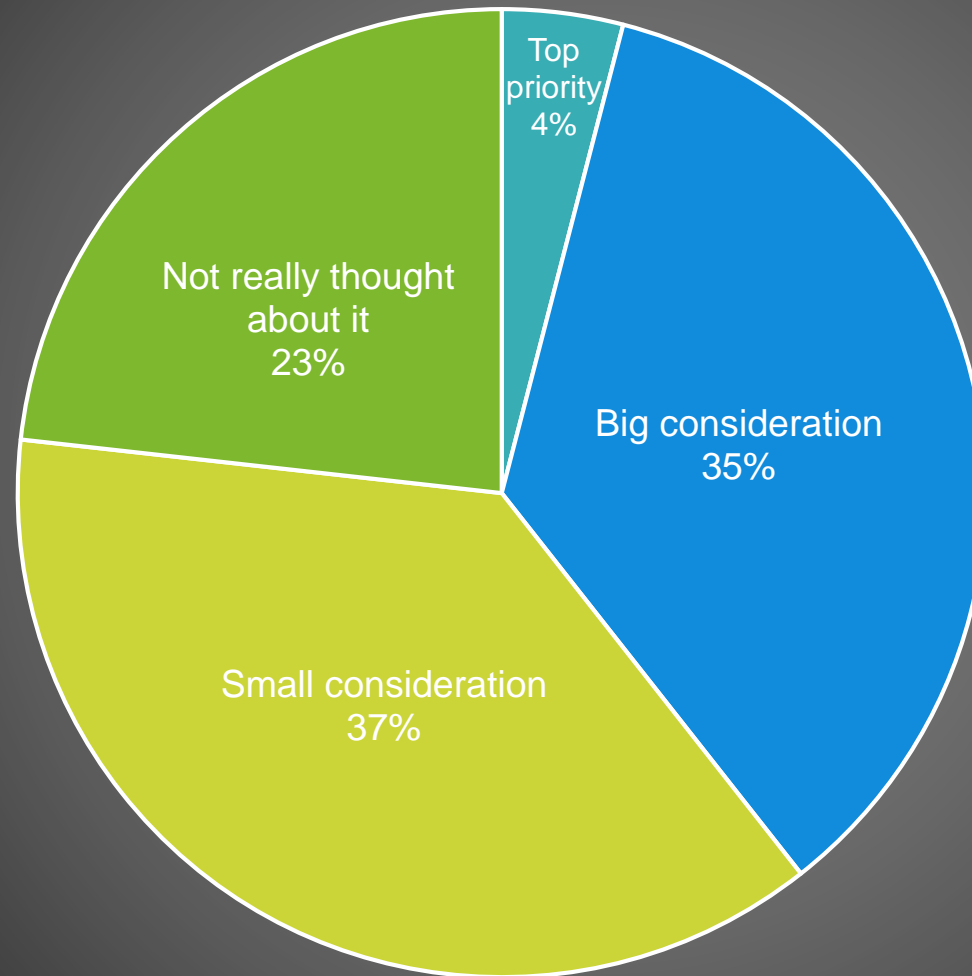


..... there is no away

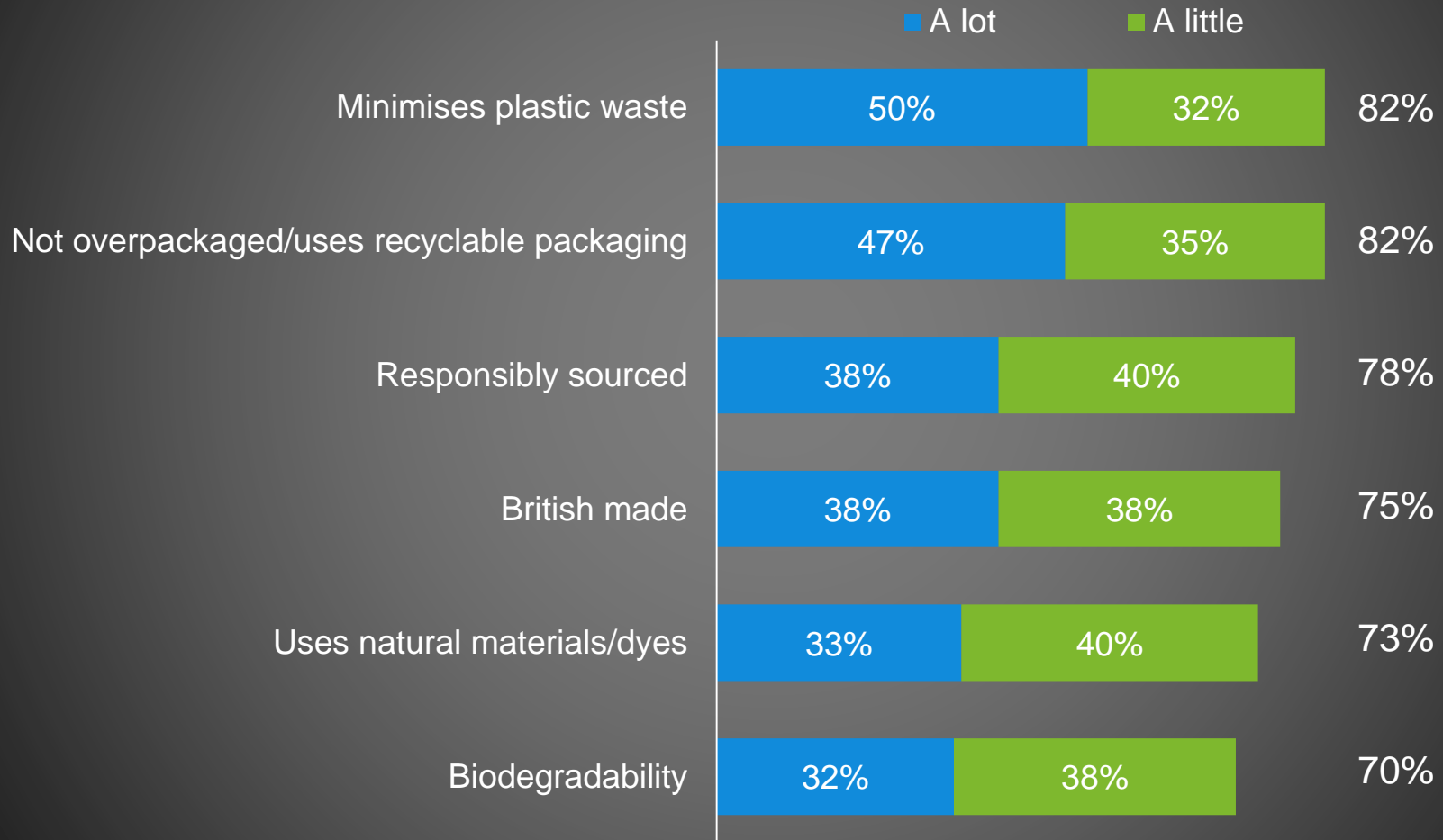
Environmental steps taken



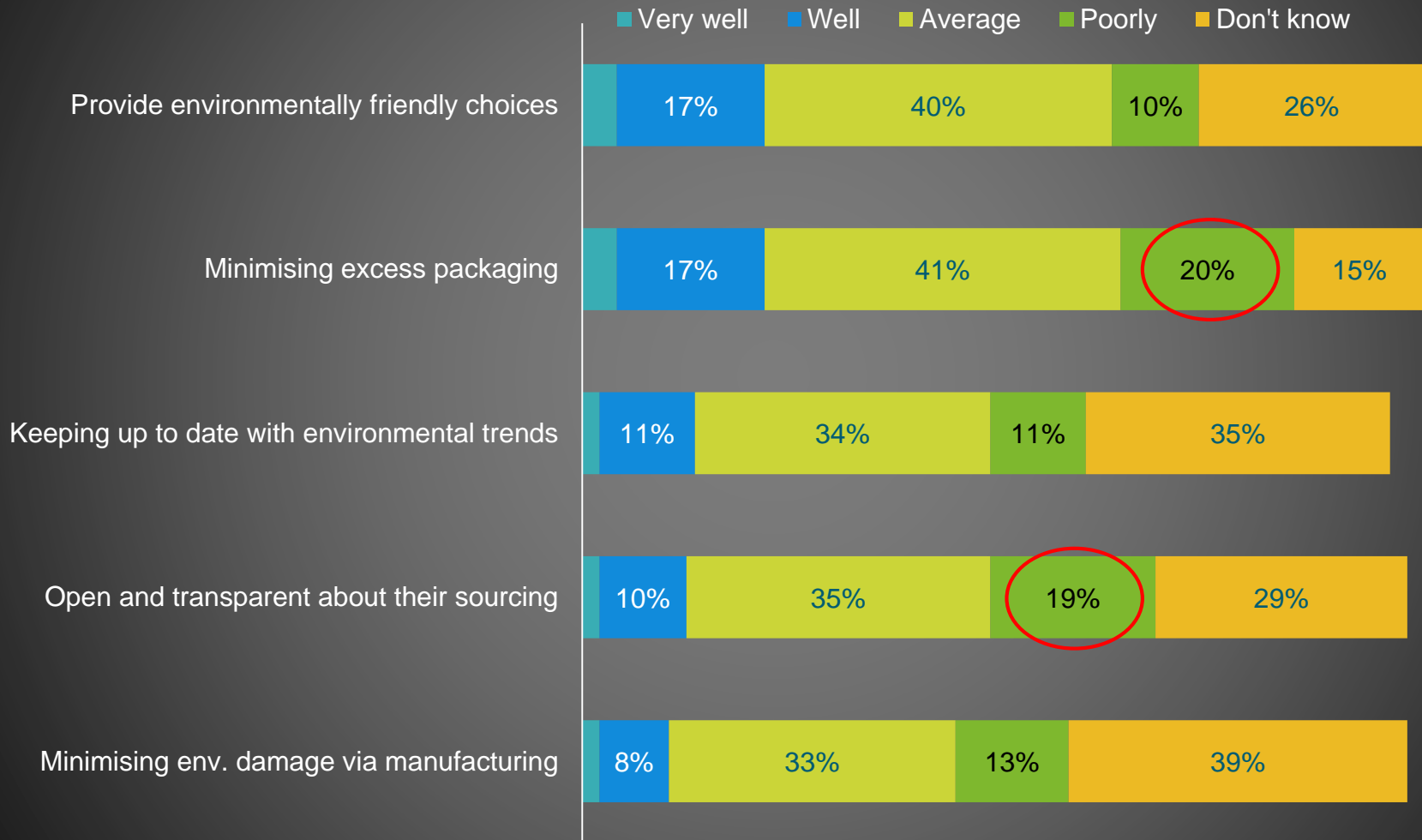
Impact on buying craft supplies



Influence of eco claims



Craft industry's environmental rating



N.B. No contextual data for other industries

Craft industry's environmental rating

I don't think there is enough pressure on the ones who are making all this stuff. That we are trying not to buy.

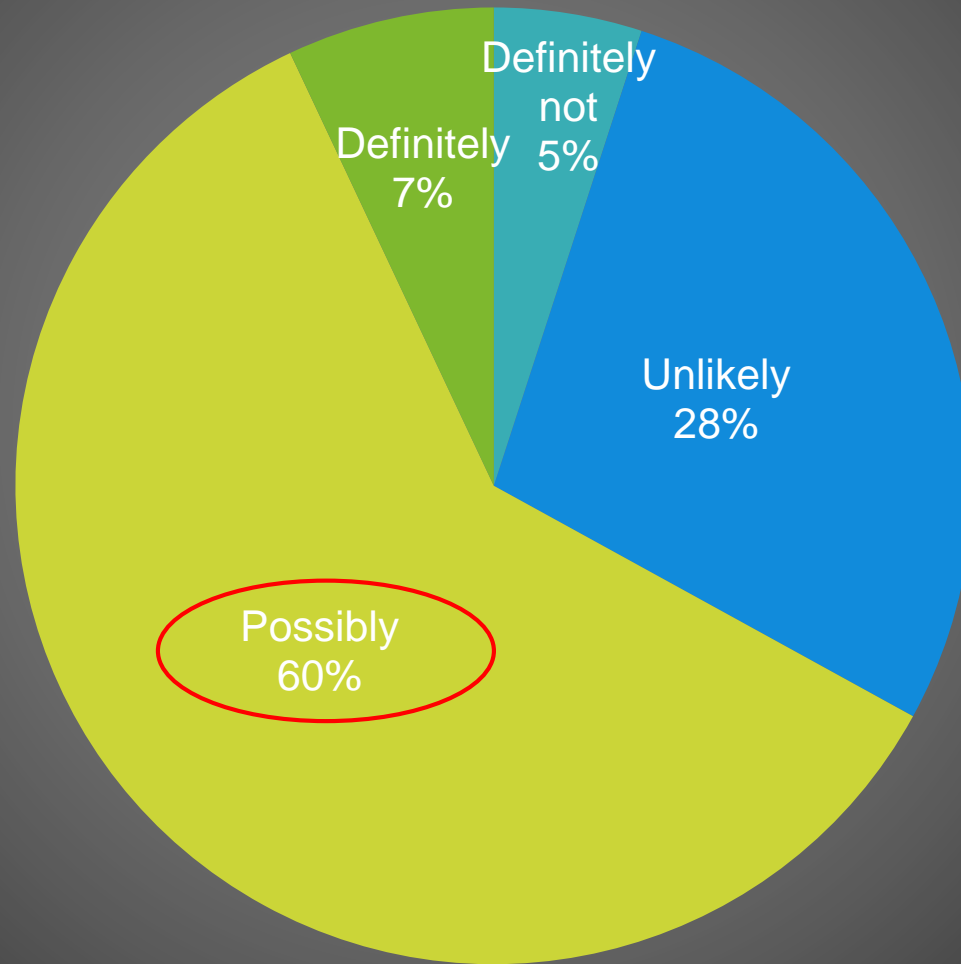
I know artists and crafters that will use recycled paper. From what I have seen there isn't much of a push from within the industry to use less plastic etc. There doesn't seem to be much happening.

Environmentally it would be a good marketing opportunity for some of these craft manufacturers. To advertise that they are leading the way. Trying to be sustainable and traceable. Not have so much plastic packaging. Make it part of their ethos.

It is changing but the changes are slow

Some stores get it from China then double the price. Some things you think you are ethically buying but you don't know where they have actually come from. It is not like fruit in Tesco, it doesn't give you the source.

Paying more for sustainable supplies



The Craft Report 2020

1. Be innovative
2. Capitalise on the audience
3. Be proactive/transparent on sustainability

THE CRAFT REPORT 2020

'The times they are a-changing'

*"... the future's so bright I gotta
wear shades..."*

THE CRAFT REPORT 2020

'The times they are a-changing'