Profile and Development Strategy for Craft in Canada

A Study Coordinated

by

Conseil des métiers d'art du Québec (CMAQ)

for

The Canadian Crafts Federation / Fédération canadienne des métiers d'art (CCF / FCMA)

by

Peartree Solutions Inc.

October 2003

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La version française de cette recherche est également disponible sous le titre *Portrait et Stratégie de développement des métiers d’art au Canada*.

Acknowledgements

This study was coordinated by Louise Chapados, Conseil des métiers d'art du Québec (CMAQ) who also led a Steering Committee composed of craft council representatives. Government representatives also participated in the initial stages of the project.

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Representatives from provincial craft councils contributed through interviews and by citing studies of craft activity in their areas.

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We acknowledge the financial support from:

- Department of Canadian Heritage(Trade Routes Program) / Ministère du Patrimoine canadien (Programme Routes commerciales)
- Department of Foreign Affairs and International Trade / Ministère des Affaires étrangères et du Commerce international
- Canada Council for the Arts / Conseil des arts du Canada

Canada

Canada Council for the Arts Conseil des Arts du Canada

Foreword

This study represents a first collaborative effort of Canada's craft community to describe and quantify its cultural and economic activity. This work is conducted both to support planning and development of craft activity and markets, as well as to provide a greater appreciation of craft activity to those outside of the craft community itself.

This study focuses on professional craftpersons, their revenues and practices as producers and marketers of their products, and on the economic impact of their activity. Specific attention is paid to markets and marketing efforts, both domestic and international, including some information on distribution agents such as boutiques, galleries and shows. Information about education and support programs is included when related to the scope of the study.

The limits of the study rest on the fact that it is a first attempt at a major endeavor and that it was undertaken with limited resources. For a full evaluation of the economic impact of the craft sector, further research is needed on the economic activity of major craft and gift shows, boutiques and galleries and other market venues both within and outside Canada. A full fledged profile and development strategy will also address relationships with the education community, and the impact of public policy on craft activity.

Another important limit to the study is due to the scarcity of public statistical information on craftpersons and their craft products or services. Economic data on craft activity is included in a variety of categories of employment and industrial products, and are buried in the nation's economic accounts under a wide variety of industrial categories. Additional research on methodologies to identify craft activity in public statistics continues to be needed.

The author wishes to express his sincere appreciation to all members of the craft community in Canada who provided information, insight, and encouragement in support of this study. The work of the steering committee was invaluable in suggesting avenues of research, providing contact names, and in reviewing drafts of instruments and reports. In particular, the tireless efforts of Louise Chapados in coordinating and directing this study were crucial to bringing this project to a successful conclusion. We hope that this work will inspire the craft community to continue to work together to promote all dimensions of craft activity in Canada.

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Executive Summary

The craft sector in Canada is a growing and vibrant collection of individual craftpersons, studios, enterprises, media guilds, public and private galleries, retail and wholesale shows, and organizations. Craft combines elements of old and new, culture and economy, traditional and contemporary, form and functionality. Working with traditional materials of clay, glass, metal, wood, stone, and natural fibres, as well as plastics, resins, and man-made fibres, craftpersons conceive, design, and render objects that are expressive, functional or decorative: vessels, clothing, cutlery, tableware, musical instruments, furniture, jewellery, decorative and art pieces.

This *Profile and Development Strategy for Craft in Canada* seeks to fulfill two major purposes: first, to provide a qualitative and quantitative profile of the craft sector in Canada, and second, to work towards a consensus strategy for craft sector development to be implemented for professional craftpersons by national and provincial craft organizations, and other supporting groups. Though many provinces have surveyed and measured craft communities in their own jurisdictions over the last decade or two, this study marks the first time that a consistent methodology to measure craft activity was applied across Canada. This also marks the first attempt to develop a cohesive domestic and international development strategy for the craft community in Canada.

The profile reveals a sector that is largely populated with skilled craftpersons working in home-based and other small studios producing one of a kind work or production work. By current employment standards the hours worked tend to be long, and the wages and incomes relatively low. At the same time, the sector supports the cultural richness and diversity of Canada that cannot be measured in dollar values. Craft activities are estimated to support some 22,600 individuals, generating total output valued at $727 million, and exports approaching $100 million dollars annually, representing 16 percent of craft revenue of the survey respondents.

Professional craftpersons are supported by craft organizations that are highly effective in a wide variety of support and development activities for craft, both commercial and cultural like fairs, shows, boutiques, shops and galleries, expositions, continuous education, advocacy and in general promote knowledge of craft. Some have been quantified in this study.

A national strategy for the next stage of craft sector development is both necessary and appropriate at this time. The craft sector shows a developing awareness of its potential as both an economic and cultural industry in Canada. Craft organizations as well as public and private key players throughout the value chain are beginning to reach out to each other to coordinate market development efforts. Individuals, studios and organizations are accessing domestic and international markets for craft with promising results. A concerted strategy that builds domestic and international markets has great potential to increase both employment and the average incomes in the variety of creative pursuits that make up craft activity in Canada.

Given the limited resources of craft organizations, however, this potential is unlikely to be realized without additional federal and provincial government support. Such support would be consistent with current cultural and economic development policies in most jurisdictions in Canada, and has been demonstrated to be effective in promoting

other cultural industries. Success also depends on building infrastructure for craft organizations to network with one another and to act cooperatively in major artistic and market development initiatives.

The Need for the Study

The need for the study arose from discussions held in 1999 and 2000 among a number of provincial craft councils (PCCs) under the banner of the newly formed Canadian Crafts Federation / Fédération canadienne des métiers d'art (CCF/FCMA) concerning marketing of craft abroad and accessing federal government support for initiatives such as participating in major craft shows in the United States and craft trade missions abroad. These discussions also concluded that the craft sector was not widely known or understood as a viable cultural industry and a worthy participant on the nation’s cultural scene.

The lack of knowledge and understanding about craft on the part of the public and government was seen a major obstacle to the general development of the sector. Following these inter-council discussions, CCF/FCMA commissioned the “Study of the Crafts Sector in Canada”, published in 2001, to provide an inventory and summary of current literature about craft in Canada, to identify and clarify a number of serious definitional problems that had arisen over the years, and to provide suggestions about how the craft community could work together to further develop the sector in Canada. In many respects the profile study picks up where this initial study left off.

This profile is a first attempt at a major endeavour focusing on professional craftpersons, their practices as producers and marketers of their products, and their revenue. Most importantly, it examines the economic impact of their activity, with a specific attention to markets and marketing, both domestic and international. It also looks at education and various related support programs.

In Canada, there are several social and cultural barriers which, although commonly known, have not become apparent through the survey. Nevertheless, these need to be identified as issues or barriers to the growth of craft in Canada and, as such, will also be issues for strategic action. These barriers have to do with a variety of conventions and perceptions which negatively or inappropriately position craft, particularly in relation to the visual arts.

Defining the Craft Sector

A conceptual definition of craft focuses on the nature of the creative endeavor and seeks to define the boundaries between craft and other forms of cultural expression, on the one hand, and between craft and more industrial modes of production on the other. An operational definition of craft looks at the various actors in the craft “value-chain”, including those engaged in craft production, education and training, marketing and sales, and in craft organizations. This definition provides the basic structure of this profile. The merit of this approach is that it includes craft-related activity so that the full scope of the sector can be understood. Gathering and identifying data can be done in such a way as to allow the inclusion or exclusion of activities as appropriate to the purpose of the analysis.

Given the diversity of perspectives on the most appropriate definition of the craft sector, perhaps the most promising way to proceed to a working definition of the craft sector is to provide the full menu of possible activities related to craft and allow users to pick and choose the segments that are relevant to a particular purpose. Other industries that have similar debates on what is and is not included have chosen to define their industry in concentric, overlapping, or adjacent rings. The core is the part of the industry that everybody clearly recognizes as included as the essence of the industry, adding rings or circles to include related or supporting economic or cultural activity.

For the craft sector, the core may be full-time professional craftspeople engaged in one-of-a-kind or production work. The rings of craft-related economic activity operate in various ways to support the core activity, and there is a symbiotic relationship to the core that should be recognized and acknowledged in any coherent and cohesive strategy to promote craft activity in Canada. The following can be major rings of craft and craft-related activity, though certain rings receive more attention in the profile than others: large craft-related studios and enterprises, craft organizations providing programs and services, show organizers, private and public galleries and museums, boutiques and cooperatives, suppliers of material or services, educational institutions, curatorial staff, researchers, writers and critics, and art and culture media.

Research Methods and Consultations

The study used a variety of primary and secondary research methods to generate this profile of the craft sector and the strategy proposals:

- A literature review on craft activity and organization in Canada and in other developed countries with strong craft sectors and programs.
- The *Economic Impact Survey of Canadian Craft Producers in 2001 (EISCCP or Economic Impact Survey)* of this research is a survey of producing craft professionals gathering demographic data, information on craft activities, and craft revenues by source. A follow-up telephone survey of 43 practising craftpersons whose studios either already export or could be export-ready was also conducted.
- A survey package was mailed to the collective memberships of 10 provincial craft councils which included 5,254 practicing full and part time craft professionals, amateurs, students, retailers, collectors, and others simply interested in craft. PCCs estimated that this list represented about 40 percent of the professional craftpersons in Canada. A total of 672 responses were received, for an overall response rate of 12.8 percent.[1] Response rates across provinces ranged from 9.5 percent in Ontario to 20.3 percent in Newfoundland. These rates are generally considered good for a mail survey.
- Data gathering with provincial councils for information on their activities as distribution agents, as program providers, and for input into strategy development.

[1] A similar survey in the United States conducted in 2000 (CODA Survey) generated a response rate of 7%.

- The *Economic Impact Survey of Provincial Craft Councils in 2002* conducted in June 2003 gathered data on the direct employment and economic contribution of provincial councils.
- Telephone interviews with 13 craft wholesale and retail agents and five representatives of large craft studios or enterprises that generate significant exports, to seek their views on a craft development strategy.
- A series of 4 regional roundtables, each with 9 to 15 participants in Calgary, Halifax, Toronto, and Montreal, for a total of 51 participants.

The development strategy gathers information and viewpoints from a variety of sources. It draws on material from the profile, interviews and discussions with craft organization executives, large craft producers, show organizers and gallery owners. It also draws on viewpoints put forward at the roundtables.

The notes and observations from these roundtables were consolidated into a set of brief issue descriptions. These issues were then sent back to representatives of provincial craft councils to gather views on their relative importance following which a priority rating was assigned, a technique which allows for an initial sharing of ideas, and a second round of discussions based on a review of all ideas presented in the first round.

The development strategy section is a synthesis of the consultation process. These elements are proposed as a starting point for the craft sector to move forward and implement a broadly supported action plan in the near future.

Summary of the Profile

Observations on the Profile of Craft Producers

- Based on survey results and best estimates of the total population of craft producers, we conservatively estimate that the craft sector generated $727 million in economic activity in 2001, including nearly $100 million in exports. This represents an important first comprehensive effort to measure the economic contribution of craftpersons, craft organizations, and distribution agents in Canada.
- We estimate that there are 14,048 craft studios operating in Canada, employing 22,597 people, including 11,968 full time craft professionals, and 10,629 part time craft professionals.
- The majority (73 percent) of craft producing members of the provincial craft councils operate as individual craftpersons; 10 percent have formed partnerships with others; and the remaining 17 percent have employees, ranging from a single part-time employee to over 30 employees.
- Average gross craft revenues for studios of full time professionals averaged roughly $60,000 in 2001, and median revenues of $30,000. Ten percent of these respondents had craft revenues in excess of $120,000.
- Among the full time craft professionals that provided the necessary data, net craft income (or earnings) averaged $17,300 in 2001, or less than $10 per hour. The

median net income in this sample was $12,000, while the top ten percent earned net income of $49,000 or more.

- One in four craft producers generate at least some revenue directly from foreign markets, with or without the support of existing export programs. Others may sell to foreign markets indirectly through sales to tourists.
- There are some successful large craft or craft-related studios and enterprises that are not directly linked with or served by PCCs.

Observations on Organizations in the Craft Sector

- The ten provincial craft councils (PCCs) provide the major organizational and developmental pivot for the sector, though they vary considerably in size, funding and resources. With very limited resources, most PCCs engage in important support activities for craftpersons and the craft sector including advocacy, promotion of artist rights, training information and activities, marketing opportunities including retail shops and shows, and export development advice and opportunities. All PCCs are engaged in provincial craft development strategies to some extent.
- The Canadian Crafts Federation/Fédération canadienne des métiers d'art (CCF/FCMA) is growing into its role of promoting and advocating for craft at the federal level, and coordinating national and international craft development efforts. It remains under funded relative to the cultural and economic development role it can play for the craft community and the general public in Canada.
- Single craft-media organizations and guilds provide their members with opportunities for national and international exposure and high level training in the practice of their craft.

Observations on Craft Market Development

- All PCCs are engaged in market activities including exhibitions, shows, boutiques, galleries.
- Many PCCs are engaged in domestic market development activities either directly or by supporting their members.
- Key private-sector players are active in the wholesale and retail distribution of craft products ranging from retail boutiques offering craft, to retail craft shows, to craft specific sections in regular gift shows. Some also offer access to retail and wholesale craft shows and galleries in the US.
- There are relatively few intermediaries in the field, and many craft producers sell directly to final consumers.

Observations on Craft Export Activity

- A number of craftpersons enjoy international reputations and sell products in the international craft market. Survey data indicates that an average 16 percent of craft revenue is generated from exports, and some producers generate nearly all their revenues from export sales. This is a surprisingly strong export performance given the dominance of micro-enterprises in the craft sector.

- The United States dominates as the largest export market for craft made in Canada, both in perception and reality.
- Almost all PCCs have engaged in export promotion activity, though some see greater promise in developing export markets by selling to foreign tourists than direct retail opportunities in foreign countries.
- Markets and export opportunities can be classified according to products, media, or functional themes.
- Quebec, through the efforts of the CMAQ, has demonstrated that strategies based on supporting the studios, developing market niches, such as common themes or media, and on quality rather that on volume or low cost, offer better outcomes.
- A development strategy needs to be phased in over time, building on the success of priority actions and initiatives.

Summary of the Development Strategy

There are two simple guiding principles or themes evident in the strategy discussion. The first guiding principle is that **support for professional craftpersons and studios builds the foundation of the craft sector**. Their efforts and activities are essential to the success of craft in Canada and they must be supported.

The second principle is that **concerted actions among all players in the sector** should be supported, financially and otherwise, to ensure the best use of the existing expertise, experience, and available resources. More cohesive action will also help us to secure additional resources that can be devoted to relevant and coordinated action. Acting in concert on a consensus action plan should include collective projects and responsibilities on collective actions.

The remaining issues presented in the strategy also reflect these principles, though somewhat less directly, through discussion of the elements of a **domestic development strategy,** followed by elements of an **international development strategy**. Both domestic and international are organised around two main issues: the *need for different strategies for different markets and audiences, products, and media (niche markets)*, and the *need to develop public and specialised knowledge*.

Conclusion

The proposed strategy for the sector outlined here rests on information and data collected through over a year of effort. It is the synthesis of a consultative and prioritization process. The initial research effort focused on producers of craft and the provincial organizations that support them, but, as importantly, there was also an effort to secure the views of those more exclusively engaged in the distribution and marketing of craft in galleries, boutiques, and craft shows.

The elements of the strategy are meant to start the discussion among the wider craft community. Broadening the discussion will ensure that the priorities have been properly set, will widen the understanding of the elements of the strategy, and will increase the chance of success by facilitating a co-ordinated effort across provincial boundaries and departmental areas of responsibility.

The profile study has been primarily focused on economic and market development. The ideas and proposals presented in the development strategy are intended as a springboard from which discussions, exchanges and collaborative actions can evolve. A cohesive sector-wide development strategy, concerned with domestic and international issues, is needed to identify the most important and effective actions to be undertaken. These actions will, in turn, require gathering resources from internal craft structures as well as from other partners including government ministries and agencies with mandates to support the cultural industries.

The craft sector in Canada has been building capacity and organizational strength by pooling efforts and pulling together. Through CCF/FCMA, provincial councils have been able to strengthen the understanding of craft within provincial and federal governments, and are beginning to convey a sense of the potential of craft as both cultural expression and a viable means to earn a living. Collective efforts must continue to strive for continued investment in craft producers, craft organizations, and in domestic and international market development.

1. Introduction

1.1 Overview

The craft sector in Canada is a growing and vibrant collection of individual craftpersons, studios, enterprises, media guilds, public and private galleries, retail and wholesale shows, and organizations. Craft combines elements of old and new, culture and economy, traditional and contemporary form and functionality. Working with traditional materials of clay, glass, metal, wood, stone, and natural fibres, as well as plastics, resins, and man-made fibres, craftpersons conceive, design, and render objects that are expressive, functional or decorative: vessels, clothing, cutlery, tableware, musical instruments, furniture, jewellery, decorative and art pieces.

This study seeks to fulfill two major purposes: first, to provide a qualitative and quantitative profile of the craft sector in Canada, and second, to work towards a consensus strategy for craft sector development to be implemented for professional craftpersons by national and provincial craft organizations, and other supporting groups. The profile includes documentation of the demographics of active craft producers, educational background, media used, craft products produced, and revenues generated. Though many provinces have surveyed and measured craft communities in their own jurisdictions over the last decade or two, this study marks the first time that a consistent methodology to measure craft activity was applied across Canada.

The profile reveals a sector that is largely populated with skilled craftpersons working in home-based and other small studios producing one of a kind works or production work. By current employment standards the hours worked tend to be long, and the wages and incomes relatively low. At the same time, the sector supports the cultural richness and diversity of Canada that cannot be measured in dollar values. As detailed later in this report, craft activities are estimated to support some 22,600 individuals, generating total output valued at $727 million, and exports approaching $100 million dollars annually.[2]

A national strategy for the next stage of craft sector development is both necessary and appropriate at this time. The craft sector shows a developing awareness of its potential as both an economic and cultural industry in Canada. Craft organizations as well as public and private key players throughout the "value chain"[3] are beginning to reach out to each other to coordinate market development efforts. Individuals, studios and organizations are accessing domestic and international markets for craft with promising results. A concerted strategy that builds domestic and international markets has great potential to increase both employment and the average incomes in the variety of creative pursuits that make up craft activity in Canada. Such a strategy would also contribute to national agendas promoting Canadian culture internationally through growth in cultural exports.

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[2] This estimate is derived from the *Economic Impact Survey of Canadian Craft Producers in 2001*, conducted in support of this study. Details on the methodology supporting this estimate appear in Section 2 of this study.

[3] For an explanation of the term "value-chain" see definition on page 4, footnote 5.

Given the limited resources of craft organizations, however, this potential is unlikely to be realized without additional federal and provincial government support. Such support would be consistent with current cultural and economic development policies in most jurisdictions in Canada, and has been demonstrated to be effective in promoting other cultural industries. Success also depends on building infrastructure for craft organizations to network with one another and to act cooperatively in major artistic and market development initiatives.

1.2 A Word on Culture and Markets

Economic studies in the cultural sector have long been controversial. This study proceeds with caution, recognizing that price and value are not always equal, and worthwhile human activity is not always recognized in high prices and substantial incomes.

Market-oriented attitudes about craft tend to be based on the idea of "craft as a product or commodity".[4] Marketers, shop owners, agents, economic planners and others tend to talk more about moving product, generating volume sales, profit margins, sales and transactions costs, and the like. In contrast, cultural attitudes include or emphasize the ideas of "craft as creative process" and "craft as cultural object". Craft artists, instructors, curators, gallery owners and collectors will talk about work being original, distinctive, innovative, rare, and so on.

These two views of craft --"craft as culture" and "craft as commodity" -- represents a rather fundamental difference of attitude and it appears throughout the craft sector, though it is changing. For instance, until recently the Canada Council for the Arts in general assisted the creative and artistic aspect of cultural activity, while avoiding support of commercial activity, at least in visual arts and crafts. Commercial activity is encouraged, however, in other cultural sectors such as theatre, music, and dance through ticket sales for public performances.

Craft objects made in Canada are indeed marketable and exportable. But the commodity approach to marketing puts "producers" in Canada in direct competition with high-volume products that are (nominally) hand-made, but produced in developing countries where monthly wages rarely compete with North American hourly wages. For example, numerous glass factories in Mexico employ basically skilled workers to produce glasses, goblets, vases, etc. that can sell through "big box" retailers or small-town drug stores throughout Canada and the US. Hot glass workers in Canada are capable of the same production work, but don't do it. Instead, using essentially the same materials and facilities, Canadian craftpersons design and make functional and sculptural objects that sell through art galleries and boutiques, along with high end craft production from the United States, Great Britain, France, Italy, Australia, and other industrialised countries.

[4] Material in this section draws heavily from a paper by Tom McFall, director of the Alberta Craft Council, *Fine Craft Profile*, written for DFAIT to assist in briefing cultural attachés on Canadian craft.

Seemingly contradictory ideas of commodity and culture do exist in the craft sector. For example, the most sophisticated clay workers in Canada do a wide range of work (from tea pots to sculpture) using different materials, firing processes or visual references. And they may call themselves potters, ceramists, clay artists, artists working in clay, clay sculptors or sculptors, according to the work that they are doing at the time. Furthermore, their work, which is always in some state of creative change, might fit into several market settings that are also in constant flux. All clay workers can have a variety of distinctly different markets and distribution channels. They might sell work from their studio, through gift shops or art galleries, from craft retail sales or wholesale shows, through an agent (although this is rare), by internet, through mail-order catalogues, to private collectors or even directly to public institutions and official collections. They might also have a reputation that leads to speaking and teaching trips, participation in public commissions, and book writing in Canada or internationally. This diversity will emerge again, notably in the discussion on defining craft practices.

This profile seeks to recognize both the cultural and economic contribution of the craft sector in Canada; the development strategy is intended to broaden and deepen the audience for craft made in Canada, and support craftpersons through increased exposure and improved incomes from craft-related activity.

1.3 Background and Objectives

This study originated in the work of the Program for Export Market Development - Trade Associations (PEMD–TA) working group composed of the Provincial Craft Council (PCC) and the Canadian Craft Federation / Fédération canadienne des métiers d'art CCF/FCMA representatives. This work concluded that the craft sector is not widely known or understood as a vibrant and viable cultural industry. The lack of knowledge on the part of the public and government has hindered development of the sector. Additional support for craft in the educational sector and cultural sectors is required to augment the skills of craftpersons and the quality of products, increase the Canadian audience for craft, and take advantage of domestic and international markets for craft made in Canada.

The study aims to achieve three complementary objectives:

- To improve the knowledge of the sector, both for those within the craft industry and for relevant government departments and agencies
- To identify elements of an economic development strategy that foster both domestic and export markets for quality craft made in Canada
- To advocate for appropriate financial support and for measures supporting cultural trade development for craft similar to those available to other cultural industries.

Meeting these objectives is expected to:

- contribute to an increased knowledge of the craft sector in Canada
- contribute to a better understanding of its strengths, challenges, and potential

- facilitate ongoing development of appropriate organizations, networks, and structures
- create expanded opportunities for craftpersons in Canada

The profile describes craft activity on a national and provincial basis, including:

- numbers of craftpersons, overall and by medium
- conditions of practice and economic situation
- the range of products produced
- sales and income
- current domestic and international markets for craft made in Canada

The development strategy seeks to:

- identify the main issues, challenges and opportunities for development facing the craft sector including consideration of organizational structures
- support professional craftpersons in studios and enterprises
- assess resources available and needed in terms of programs and funding
- coordinate strategies for domestic development at the national level
- identify and realize opportunities in international markets, including specific markets

1.4 Definitions

Although craft is acquiring an established position within contemporary Canadian culture, general knowledge is still lacking on what constitutes the practice of craft. Craft is a broad and diverse field and attempting to define it is a task no less demanding than attempting to define music or dance.

Many definitions of craft are possible, and their usefulness depends on the purpose of the exercise. For purposes of national *economic* accounts which focus on measuring the economic value of activity according to the nature of the outputs, craft generally falls into the category of manufactured goods and is classified to various industries according to the materials used and/or the function of the objects produced.

A more *operational* definition of craft looks at the various actors in the craft "value-chain", including those engaged in craft production, education and training, marketing and sales, and craft organizations.[5] This is the definition that provides the basic structure of this profile of the craft sector.

A *conceptual* definition of craft focuses on the nature of the creative endeavour and seeks to define the boundaries between craft and other forms of cultural expression, on the one hand, and between craft and more industrial modes of production on the other. This type of definition has received the most attention within the craft community itself, and is the subject of a healthy and vigorous discussion. Some flavour of this debate is presented in the following section, providing some insight into the variations of the meaning of the term *craft* within the craft community.

[5] More generally, the term "value chain" refers to the range of economic activities that transform a set of raw materials -- through the application of labour, skill, capital, and technology -- into products and services delivered to the final consumer.

1.4.1 Defining Craft Practice

To understand what constitutes professional craft practice it is helpful to look at craft from a number of perspectives. One perspective focuses on the materiality of various craft disciplines or media, such as clay, fibre, glass, metal, and wood, and the craftsperson’s detailed knowledge of and expert skill in working with these media. Another perspective focuses on utilitarian functionality where the maker's primary purpose is in making objects that can be used. Most such functional work is created in limited production. Another perspective defines craft in terms of intent, such as decorative work, expressive work, or work that interfaces with interior design and architecture. This latter includes, for the most part, unique works that are produced on a one-of-a-kind basis.

Many craftpersons have adopted the term “fine craft” to identify a level of professional practice that distinguishes the work of makers who have strong backgrounds in craft, who have exhibited widely and whose work is held in high regard by their peers and colleagues in the field. The producers of fine craft include the teachers and artistic leaders in each media field. Their outstanding work, sought after by collectors in many countries, is the benchmark of fine craft in Canada today. Yet another perspective focuses on reviving or interpreting traditions. Each of these perspectives requires a different context in which craftwork is understood, evaluated and discussed.[6]

1.4.2 Defining the Craft Sector

Given the diversity of perspectives on the most appropriate definition of the craft sector, perhaps the most promising way to proceed to a working definition of the craft sector is to provide the full menu of possible activities related to craft and allow users to pick and choose the segments that are relevant to a particular purpose. Other industries that have similar debates on what is and is not included, have chosen to define their industry in concentric, overlapping, or adjacent rings. The core is the part of the industry that everybody clearly recognizes as included as the essence of the industry, adding rings or circles to include related or supporting economic or cultural activity.

For the craft sector, the core may be full-time professional craftspeople engaged in one-of-a-kind or production work. A related ring could consist of those who produce in large workshops and large quantities, and another ring could include those who manage craft galleries or outlets, or engage in other forms of craft sales, marketing or distribution. Another ring may consist of part-time practitioners, and still another would include amateur or hobby producers. The idea is to include all possible craft-related activity so the full scope of the industry is understood, but gather and identify data in such a way as to allow one to include or exclude activities as appropriate to the

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[6] Québec defined craft in legislation under Law S32.01 – *Loi sur le statut professionnel des artistes des arts visuels, des métiers d’art et de la littérature, et sur leurs contrats avec les diffuseur*. Saskatchewan also has status of the artist legislation. Various organizations, including provincial craft councils, struggle with defining the craft community. Most have adopted definitions that reflect and encompass the accepted provincial craft community, and there are broad similarities in these definitions, though they are not identical across provinces.

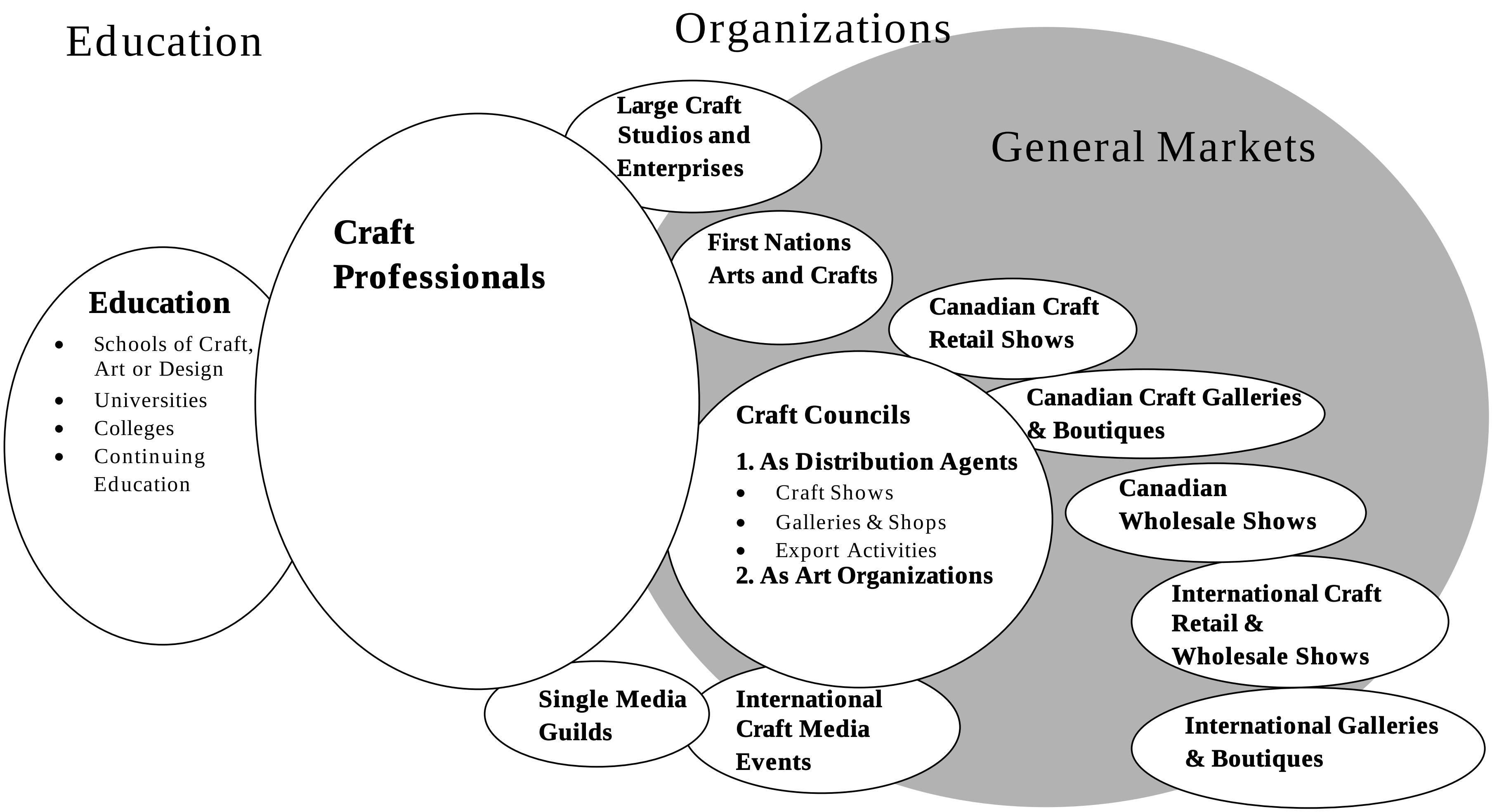
purpose of the study or analysis. This approach of being inclusive but careful to categorize will also assist in tracking how the sector evolves and in tracing individuals and studios as they move from one ring of craft activity to another.

The rings of craft-related economic activity operate in various ways to support the core activity, and there is a symbiotic relationship to the core that should be recognized and acknowledged in any coherent and cohesive strategy to promote craft activity in Canada. The following is a list of the major rings of craft and craft-related activity, though certain rings receive more attention in the profile than others:

- Full and part time craft professionals, constituting the core of craft activity;
- Large studios and enterprises that have their roots in craft, and retain elements of individual craft production
- First Nations arts and craft producers
- CCF/FCMA, provincial craft councils and other local, provincial, regional, and national craft organizations providing programs and services in support of craft activity
- Single media organizations and guilds
- Show organizers producing major, national and internationally recognized craft events
- Private galleries, boutiques, and cooperatives, sometimes owned by craftpersons
- Suppliers of craft materials, and providers of other services to craft business including shippers and export brokers
- Educational institutions delivering art, design, and craft courses, including the business aspects of craft
- Public galleries and museums and curatorial staff who research, present, and document significant works and may purchase craft for public collections
- Independent researchers, writers and critics
- Art and culture media such as television, magazines and newspapers that generate information for the craft sector itself, but also for the interested public, serving to create increased awareness, appreciation, and markets for craft

The study focused its primary research on just a few of these categories, and most particularly on producers of craft affiliated with provincial craft councils. Other dimensions of the craft network were explored with over twenty interviews which gathered information on the nature of their craft-related activities, indicators of their economic and cultural contribution, and their perspectives on market development issues and opportunities.

Exhibit 1: The Craft Sector



1.5 Methodology

Consistent with the current working model of CCF/FCMA, one of its constituent provincial councils, the Conseil des métiers d'art du Québec (CMAQ) in this case, took the lead in guiding this study project on behalf of the federation. Department of Canadian Heritage/Ministère du Patrimoine canadien, in cooperation with the Department of Foreign Affairs and International Trade (DFAIT), and the Canada Council of the Arts (CCA) provided funding support.

1.5.1 Research Methods

The study used a variety of primary and secondary research methods to generate this profile of the craft sector as indicated below (copies of interview guides and survey questionnaires are available in Appendix A.

1) A literature review, some of which was conducted through a prior project[7] provided an initial assessment of what is and what is not known about the craft sector in Canada. This work included review of a number of provincial craft profiles and economic development studies, as well as materials in various craft periodicals and publications.

2) The *Economic Impact Survey of Canadian Craft Producers in 2001 (EISCCP or Economic Impact Survey)*, a survey of producing craft professionals gathering demographic data, information on craft activities, and craft revenues by source was conducted in Summer of 2002. The survey was distributed by mail to 5,280 members of provincial craft councils, and advertised on provincial craft council websites. Telephone interviews with a random sample of 45 craft producers who had not responded to the mail survey were conducted to determine whether the 626 respondents to the mail survey could be considered a representative sample. The full results of the survey are discussed in a following section.

3) A telephone survey of 43 practising craftpersons whose studios either already export or could be export-ready based on the fact that they generate at least $50,000 in craft revenue in 2001, or at least $5,000 in export. The sample for the *Craft Producer Export Survey* was drawn from the list of respondents to the craft *Economic Impact Survey*.

4) Data gathering with provincial councils for information on their activities as distribution agents, as program providers, and for input into strategy development.

5) Telephone interviews with 13 craft wholesale and retail agents to seek their views on a craft development strategy.

6) Telephone interviews with five representatives of large craft studios or enterprises that have developed a significant export market for their products.

[7] See: *Study of the Crafts Sector in Canada: Inventory and Summary of Current Literature; Defining the Crafts Sector; Working Together to Develop the Crafts Sector*, Government of Canada, May 2001.

7) A series of 4 regional roundtables, each with 9 to 15 participants in Calgary, Halifax, Toronto, and Montreal, for a total of 51 participants.

8) The *Economic Impact Survey of Provincial Craft Councils in 2002* conducted in June 2003 gathered data on the direct employment and economic contribution of provincial councils.

Information and insights were gathered through the research for the development strategy, and most importantly at steps 3, 4, 5, 6 and 7.

Though craft producers were the main focus of data-gathering efforts, the craft sector encompasses larger studios and enterprises as well as a larger community of craft organizations, public and private galleries, shops and boutiques, and show organizers. The craft sector also encompasses educators, collectors, curators, and writers. This profile recognizes the contributions and the roles played by these members of the craft community, though these contributions are not quantified or discussed to the same extent as the core group of craft professionals.

Though many provinces have surveyed and measured craft communities in their own jurisdictions over the last decade or two, this study marks the first time that a consistent methodology to measure craft activity was applied across Canada. If such a survey had been seen to be an easy task, perhaps it would have been conducted earlier. There is no comprehensive database that provides contact information for all professional craftpersons in Canada. Not only does the lack of such a database eliminate the possibility of reaching all professional craftpersons, it also makes it difficult to extrapolate the results of a sample to the universe of all craft practitioners. As a result, national totals in craft sales and total craft-related revenues can only be estimated on the basis of certain defensible assumptions.[8] Our methods and assumptions were informed by the *Economic Impact Survey of the American Craft Scene* directed by the Craft Organization Development Association (CODA).[9]

The survey was mailed to a list compiled from the membership records of the ten provincial craft councils. Provincial craft councils estimated that this list represented only approximately forty percent of the professional craftpersons in Canada, but no more compreshensive list was available.

The total economic impact of the craft sector requires additional information on numbers of craft producers in Canada, on output of larger scale firms that can be considered craft production, and on the value-added contribution of craft wholesale and retail activities including private galleries, and wholesale and retail shows with operations in Canada.

These research activities served both purposes of this project: the profile or description of the craft sector; and the economic development strategy for the sector.

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[8] Craft professionals can derive income from *sales* of craft objects as well as other craft-related activities including grants and bursaries, and teaching. We use the term *sales* to refer to the sale of craft objects, while craft *revenues* include sales as well as other craft-related income.

[9] Formerly known as “Craft Organization Directors Association,” CODA has recently adopted a new mandate, goals, and objectives. CODA does not have a web site at the time of this writing.

1.5.2 Finding Craft in Published Statistics

The key point on craft statistics is that craft activity is buried in the nation's economic accounts under a variety of industrial categories. Furthermore, many of the craft products described by the respondents to the survey are not included in the "cultural products" identified by Statistics Canada and Canadian Heritage. Many manufacturing industries have their origins in craft, and both craft and manufacturing are often categorized by the primary materials used such as wood, metal, clay, leather, fur, or textiles. There is no foolproof way to distinguish craft activity from the output of mass production facilities, though the employment size of the firm offers a very rough means of distinguishing possible craft producers from industrial firms. As a result, an economic analysis of the craft sector requires primary data gathering and careful analysis rather than a simple presentation of data from Statistics Canada.

The standard sources published by Statistics Canada tend to lead to underestimation of craft activity because of the micro-entreprise character of the industry.

1) Self-employment, employment in related fields, and part-time employment tends to lead to underestimates of the numbers of persons active in the sector.

2) A diversity of formal and informal distribution channels tends to lead to underestimates of sales figures.

3) Industry and products based statistics tends to include craft in categories with other manufactured goods, in particular for export statistics.

Given the deficiencies of published statistics, this study conducted the first survey of craft producers to establish a baseline estimate of economic activity in the craft sector and to describe the demographic characteristics of craftpersons in Canada. A methodology for identifying craft activity within current statistical classifications is yet to be developed.

2. Profile of the Craft Sector in Canada

2.1 Introduction: The Size and Scope of the Craft Sector

This section aims to provide an economic and demographic profile of the professional craft sector in Canada, fulfilling the first of the main objectives of this study in two ways:

- To provide a qualitative and quantitative profile of the craft producers in Canada
- To document other elements in the craft network including retailers, show organizers, and larger studios and enterprises

The profile of craft producers documents the demographics of active craft producers, their educational background, media used, craft products produced, revenues generated and net incomes obtained by craft activity. Most of this data was gathered though a survey of professional craft producers and their studio operations, drawn from a sample frame of provincial craft council members.

Overall, the survey results showed that craft activity, in addition to its cultural contributions, generated significant economic benefits estimated at nearly $727 million in value-added in 2001. With relatively little public investment in business or export development in most jurisdictions, an estimated 22,600 craftpersons have designed, developed, produced, and marketed their products in domestic and international markets. The survey confirms that craft studios are operated by self-employed craftpersons working alone, in partnership with other craftpersons, or with employees, and are supported by craft organizations that are highly effective in leveraging public resources to promote distribution networks and knowledge of craft.

This section also identifies the contributions of other circles of craft-related activities as depicted in Exhibit 1. Such an exhibit cannot reflect all the actual complexity of the relationships between the players, but can show that there are players (producers, craft show organisers, associations) at every level (local, regional, national and international), and that in some cases a craftsperson can have a closer relationship to an international gallery than to a local craft organisation.

Given the limits of this study, and the extent and diversity of these groups, we have less economic information to offer for them than for craft producers associated with craft councils, but we believe it important to describe their roles and activities to provide a more complete sense of all actors in the craft community. In this way we document the activity of larger craft producers, such as hand-built pipe organs and large jewellery studios, first nations craftpersons, organizations serving the craft community, and those who provide education and training in craft techniques and related business skills.

2.2 Craft Producers

Professional producers of craft form the core of the craft sector. They need education and training institutions, federal and provincial cultural and economic development programs, craft councils and guilds, and distribution networks. Their professional practices require creativity and design skills, as well as production techniques, and business management skills.

This study draws primarily on a survey of craft producers who are members of provincial councils. Recognizing that not all craftpersons are members of councils, we have drawn on other provincial studies to augment the information from the survey to generate an estimate of total craft activity in Canada inclluding a recent study by the Québec Société de développement des entreprises culturelles (SODEC) to add to the overall picture.

2.2.1 The Survey of Craft Professionals

As with most surveys conducted for the first time, lessons were learned for future administrations of the survey. From a technical point of view, the response rates showed real interest within the craft community.

Survey Methodology

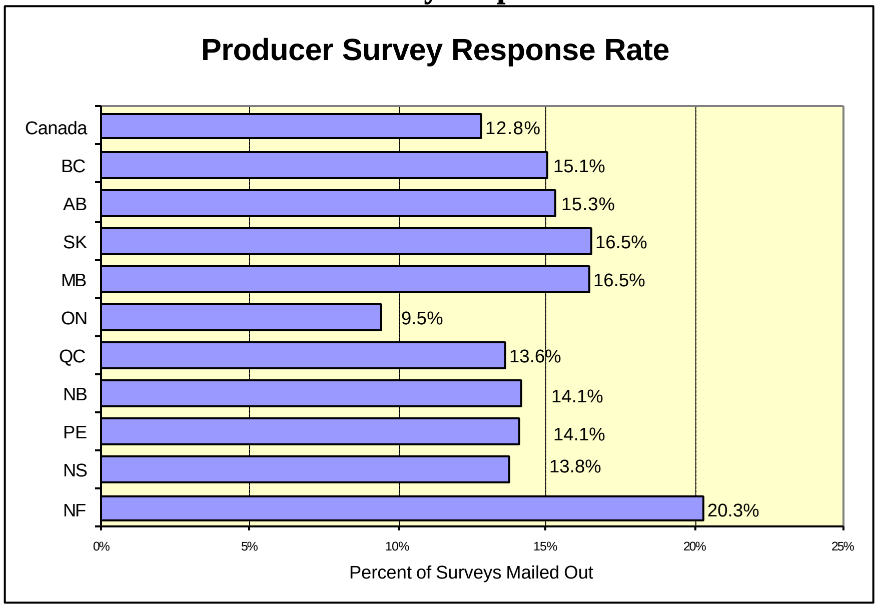
The following points present the salient details of the Survey of Craft Producers developed and conducted for this study.

- The survey forms and postage-paid addressed envelopes were mailed out with a CCF/FCMA information package in late June 2002.
- The package was mailed to 5,254 members of provincial craft councils. Craft councils vary in the nature of their membership. Québec includes only practicing full and part time craft professionals. Other councils may include amateurs, students, retailers, collectors, and others interested in craft.
- The survey documentation included a request to distribute to other craftpersons, though the degree to which this occurred is unknown. Forty-two respondents or 6 percent of the total number of responses indicated they did not belong to a *provincial* craft council. Less than a dozen respondents indicated they were not members of a craft council, local, provincial, national or international. We assume they became aware of the study through word of mouth as requested in the survey instrument, or from online notices on craft council websites and newsletters advertising the survey.
- An on-line version of the survey was made available and advertised on some provincial craft council sites and on the CCF/FCMA website. Three electronic responses were received, though this option was not heavily promoted.
- Eighty-six (13 percent) respondents indicated they belonged to two or more provincial councils, so it is possible that some craft studios received more than one of the 5,254 mailed out surveys, despite efforts made to eliminate duplicate contacts from the final mailout list.

Response Rates and Sample Composition

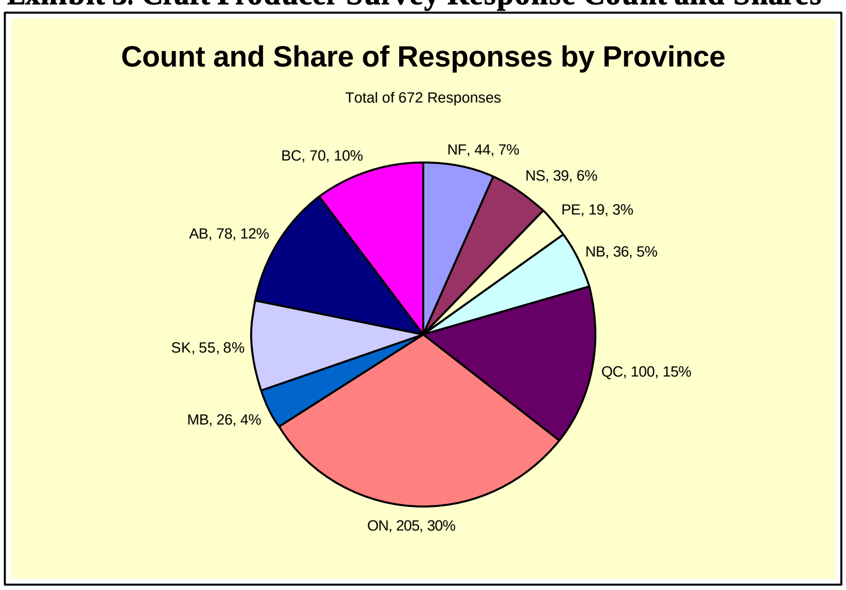
- The total of 672 responses included 45 completions from a random telephone follow-up to assess whether there was a significant self-selection bias among mail survey respondents. We found that there was no substantial difference in the characteristics and reported revenue and income figures between those responding to the mail survey and those contacted by telephone.

Exhibit 2: Craft Producer Survey Response Rate



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

Exhibit 3: Craft Producer Survey Response Count and Shares



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

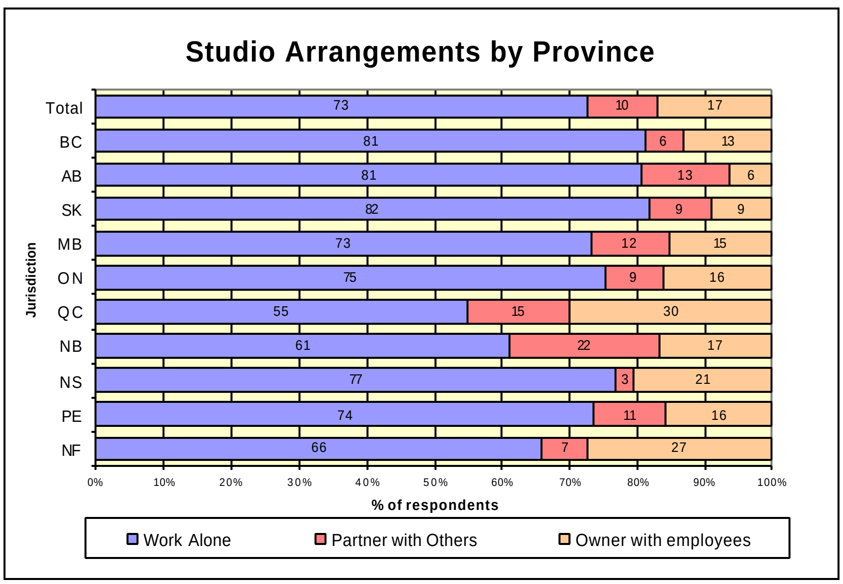
- The overall response rate of 12.8 percent is based on the number of responses received divided by the number of surveys sent out to members of provincial craft councils. The Craft Organization Development Association (CODA) survey in the United States conducted in 2000 generated a response rate of 7 percent.

- Response rates across provinces ranged from 9.5 percent in Ontario to 20.3 percent in Newfoundland. This response rate is good for a mail survey with no significant reminders issued or telephone follow-up.[10]
- Among those responding, 86 percent reported revenue information, including 88 percent of those who indicated they were full time craftpersons.
- Ontario has an estimated 25 percent of membership that is not in active craft production (retired craftpersons, retailers, collectors, etc.) that may contribute to low response rate.
- Though Ontario had the lowest response rate, more responses were received from craftpersons from Ontario than any other province due to the large number of craftpersons residing in Ontario (see exhibit 3).

2.2.2 Profile of Craft Producers

This profile describes characteristics of the craft production sector in Canada based on a the survey of craft producers drawn from the membership lists of the ten provincial craft councils in Canada. Unless otherwise noted data presented in this section is drawn from or extrapolated from the data obtained in this survey. Note that because the provincial sub-samples are small in the case of most provinces, provincial results should not be considered definitive, and are presented only as describing the responding sample, not the entire population of craft studios in any one province.

Exhibit 4: Craft Producer Studio Arrangements



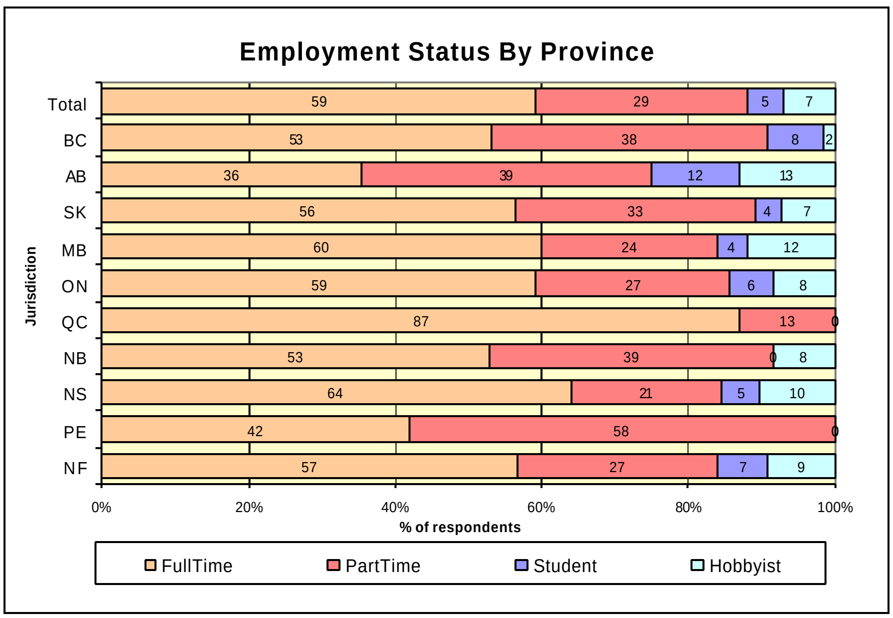
Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

[10] DSS Research reports that market research surveys can expect response rates of between 10 and 15 percent. http://www.dssresearch.com/Library/General/mailresp.asp

Production Studio Arrangements

- Nearly three out of four respondents work alone, while one in ten work in partnership with other craftpersons, and one in six craft studios have paid employees.
- Québec has the highest proportion of enterprises with paid employees.
- Respondents in Western Canada, particularly west of Manitoba, were more likely to work alone in studios.
- Exhibit 5 shows 88 percent of persons responding to the survey are craft professionals. Nearly all of the remaining 12 percent of respondents said they were students or amateurs who generated at least $1000 in craft revenue in 2001.
- Québec has the largest proportion of respondents working full time, while Alberta has the smallest.

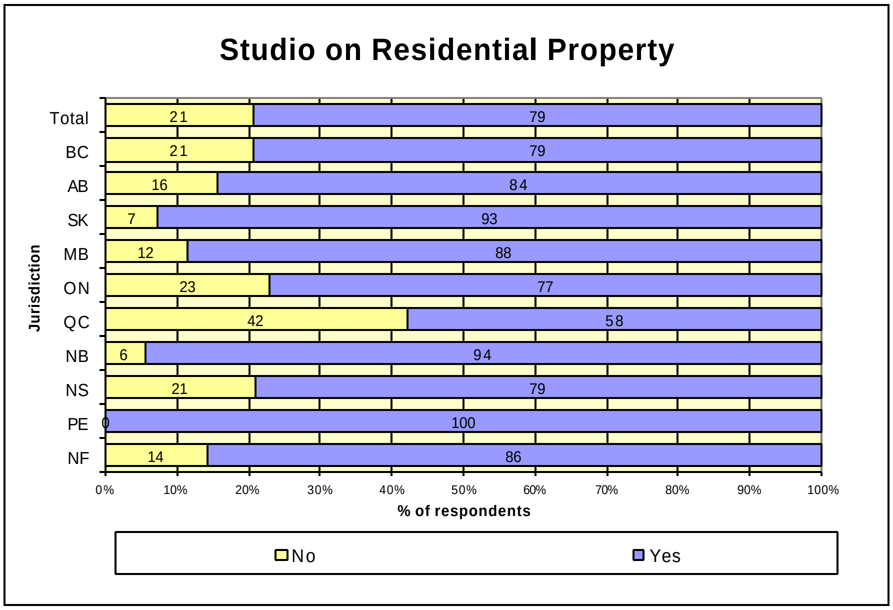
Exhibit 5: Craft Producer Employment Status



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- Exhibit 6 shows that across all provinces, four of every five respondents had a studio located on their home property.
- Québec has by far the largest proportion of respondents with studios not co-located with their residential property.
- All respondents from PEI worked from a home studio.

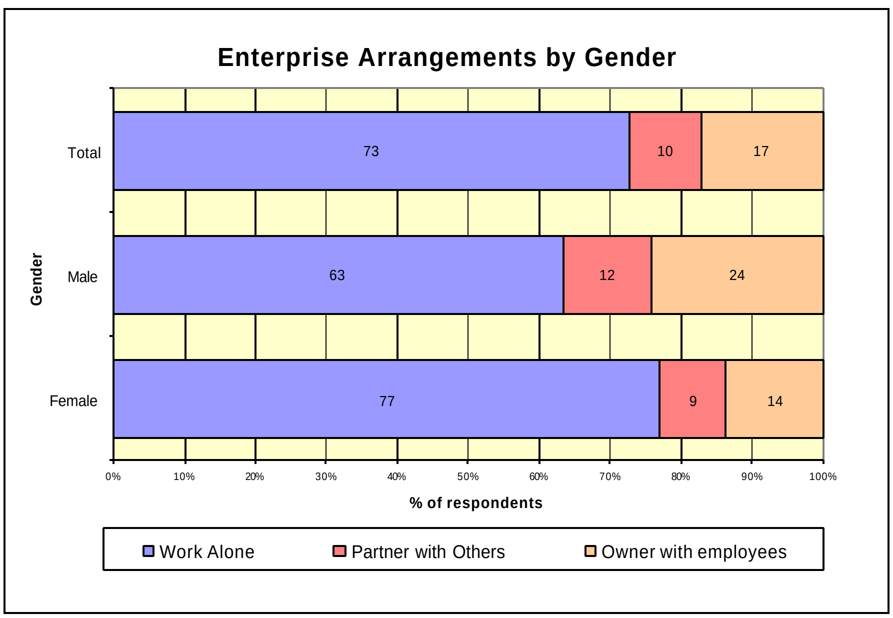
Exhibit 6: Craft Producer Studio Location



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- The survey indicated female respondents outnumbered males by two to one, a result in keeping with most of the findings on the gender composition in craft. Exhibit 7 shows that nearly two-thirds of males work alone, compared to about over three-quarters of females.

Exhibit 7: Enterprise Arrangements by Gender

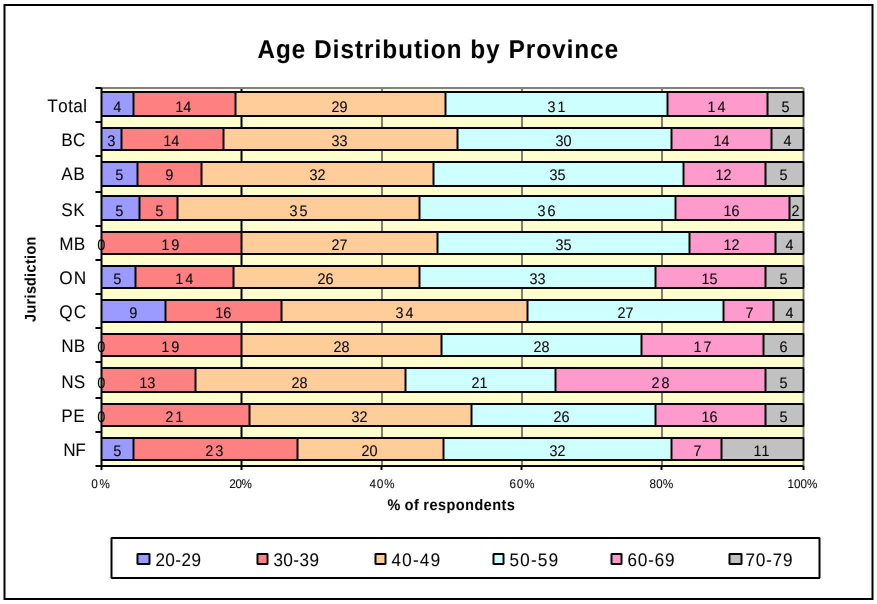


Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- Exhibit 8 shows that survey respondents are relatively highly concentrated in the forties and fifties age groups. Note that the survey only asked for the age of the respondent, so the age of craft studio employees is not included in this distribution.

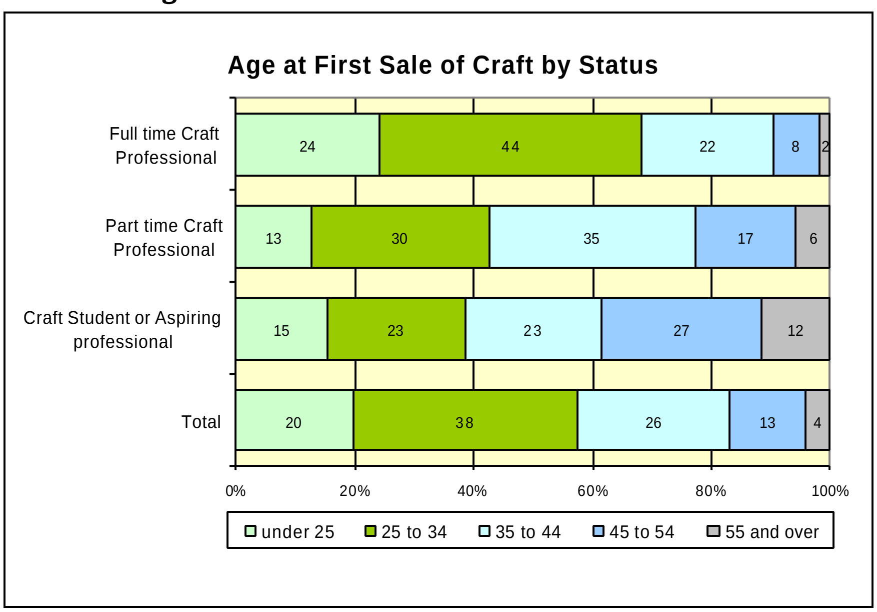
- Relatively few responding craftpersons are in their twenties and thirties, though this may be more typical of the self-employed more generally, rather than purely a craft sector characteristic.

Exhibit 8: Craft Producer Age Distribution



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

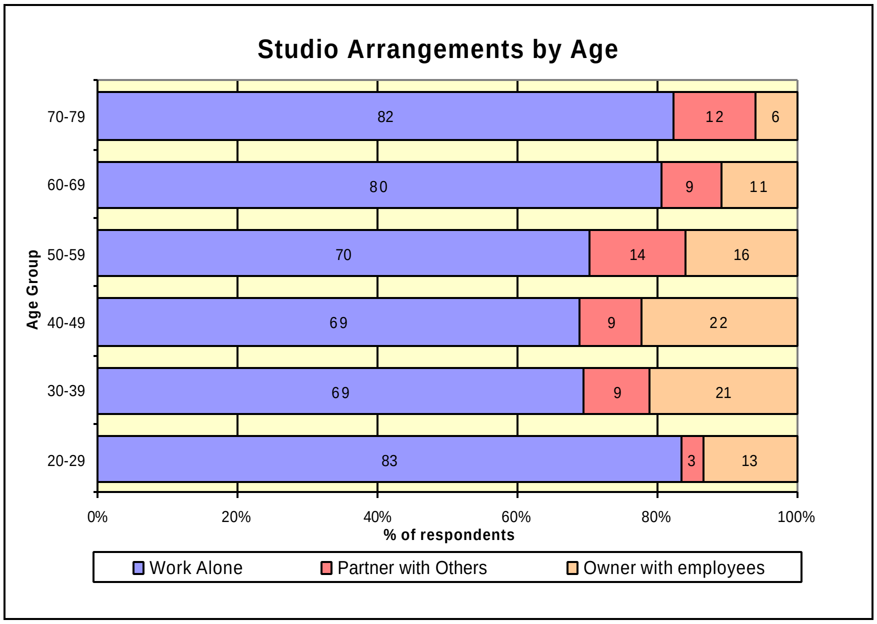
Exhibit 9: Age at First Sale of Craft



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

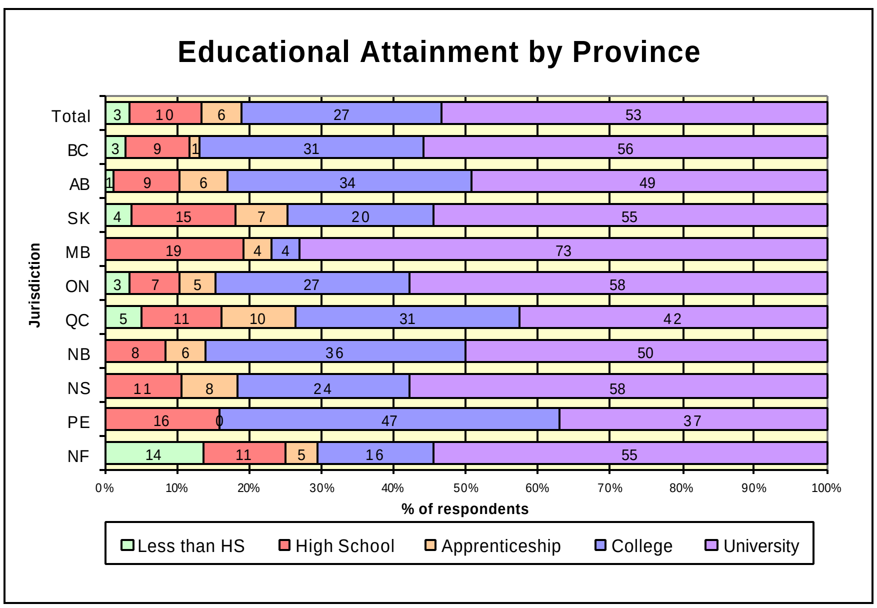
- The majority (68 percent) of full time craft professionals sold their first craft before the age of 35, while part time (43 percent) and craft students or aspiring professionals (38 percent), and hobbyists (not shown, 25 percent) were less likely to sell their first craft before the age of 35.

Exhibit 10: Studio Arrangements by Age



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

Exhibit 11: Craft Producer Educational Attainment

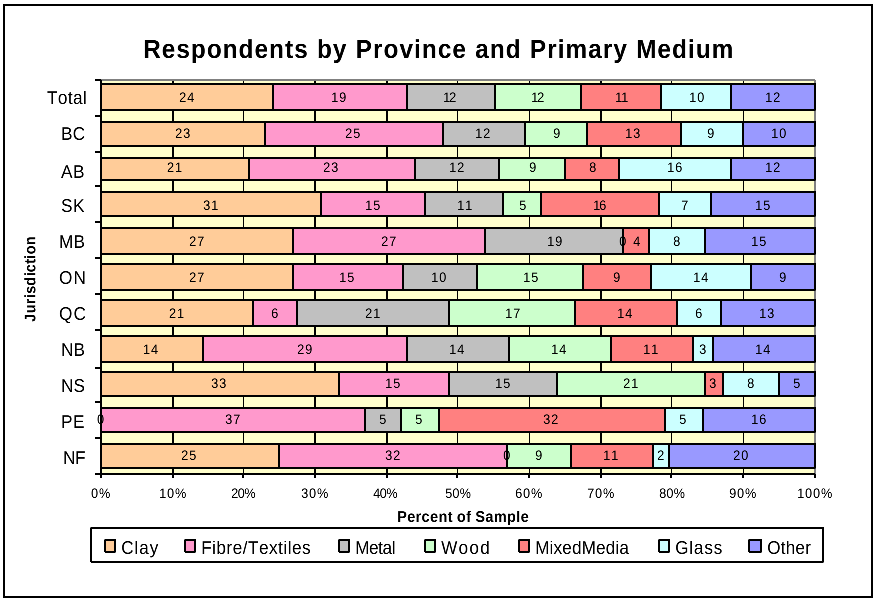


Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- Respondents are highly educated with over half the respondents holding a university degree and only one in eight have a high school education or less.
- Craftpersons working in clay are the largest media group among respondents, at nearly one in four, followed by fibre, with nearly one in five in the responding sample.

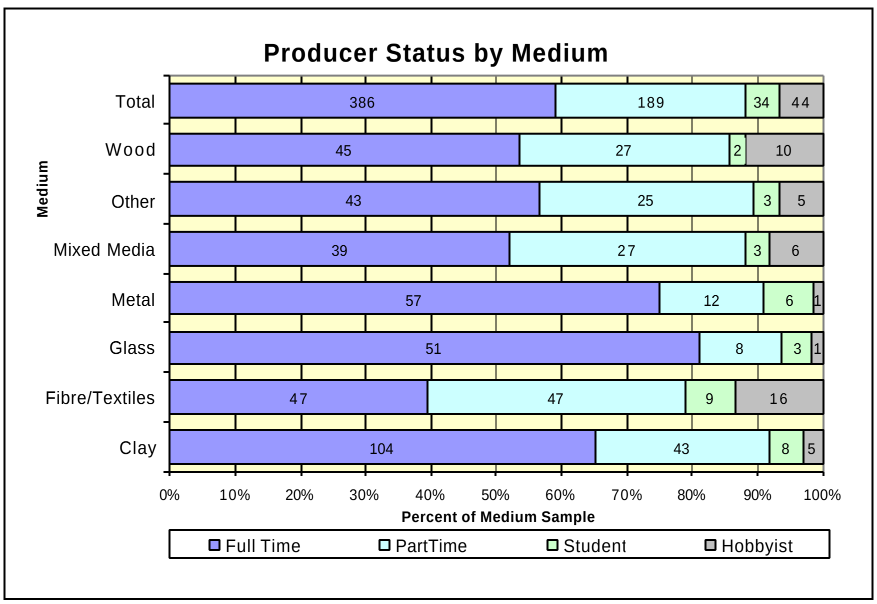
- Small sample sizes limit the reliability of provincial estimates, particularly among the smaller provinces.

Exhibit 12: Craft Producer Media Distribution by Province



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

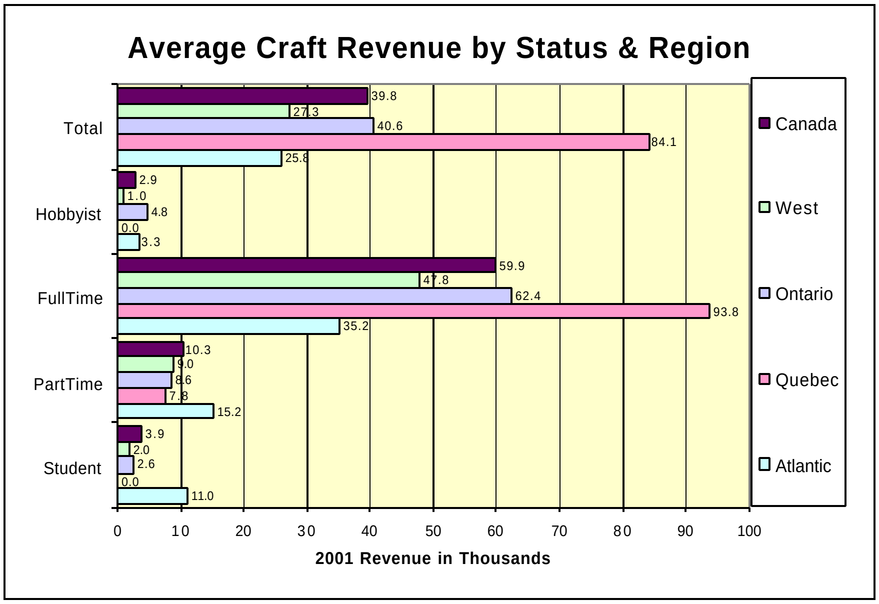
Exhibit 13: Craft Producer Media Distribution



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- Higher capital costs and the difficulties of working with certain media make it more likely that craftpersons in glass and metal work full time (Figure 13).
- Fibre and textiles have a larger proportion of non-full time craftpersons.

Exhibit 14: Craft Producer Average Studio Revenues



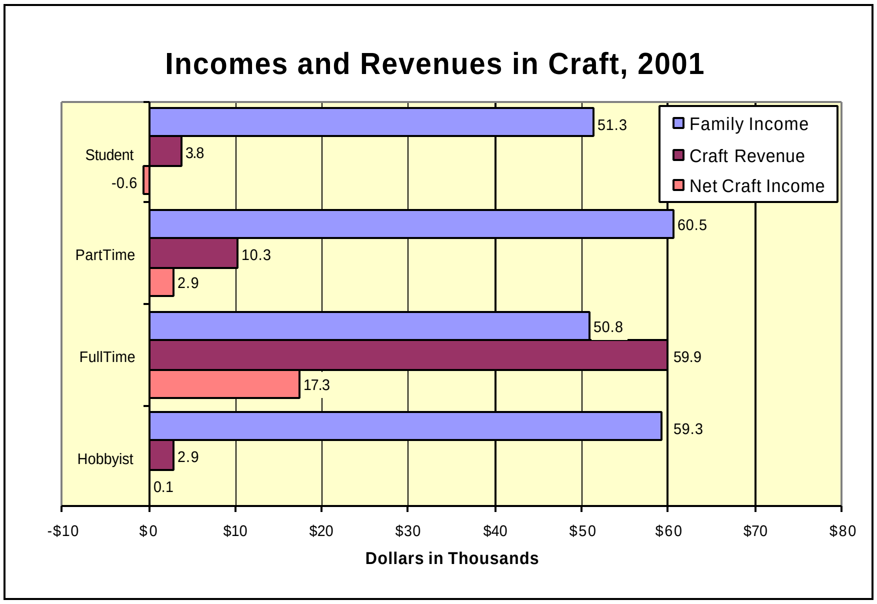
Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- Full time craftpersons, representing 59 percent of the studio sample, generated 91.5 percent of the total craft revenue reported in the survey.
- Part-time craftpersons representing 29 percent of the studios in sample generated 7.5 percent of the revenue reported in the survey. Hobbyists and students made up 7 percent and 5 percent of the sample, and evenly split just 1 percent of reported craft revenue.
- Overall, the average respondent generated $40,000 in craft related revenues in 2001.
- Average gross craft revenues for studios of full time professionals averaged roughly $60,000 in 2001, and the median revenue was $30,000. Ten percent of studios had revenues in excess of $120,000, while 25 percent of studios had annual craft revenue of $60,000 or more. Twenty five percent of the 344 respondents that provided data had less than $15,000 in total revenue in 2001.
- Though some suggested that income information was too private to report on a survey, 86 percent of respondents did provide revenue and income data, including 88 percent of full time craftpersons.
- Exhibit 15 shows that respondents had average family incomes comparable to the average Canadian household, but net income from craft activities represented only a small proportion of this income for all but full time craftpersons. Even for full-time craftpersons, net craft income represented only about one third of total family income.
- Among the 320 full time craft professionals that provided the necessary data, net craft income (or earnings) averaged $17,300 in 2001, or less than $10 per hour. The median net income in this sample was $12,000, the upper quartile earned $23,000 and more, and the bottom quartile earned $4,000 and less. The bottom ten percent of

these full time professionals reported negative net income from craft for the year, while the top ten percent earned net income of $49,000 and more.

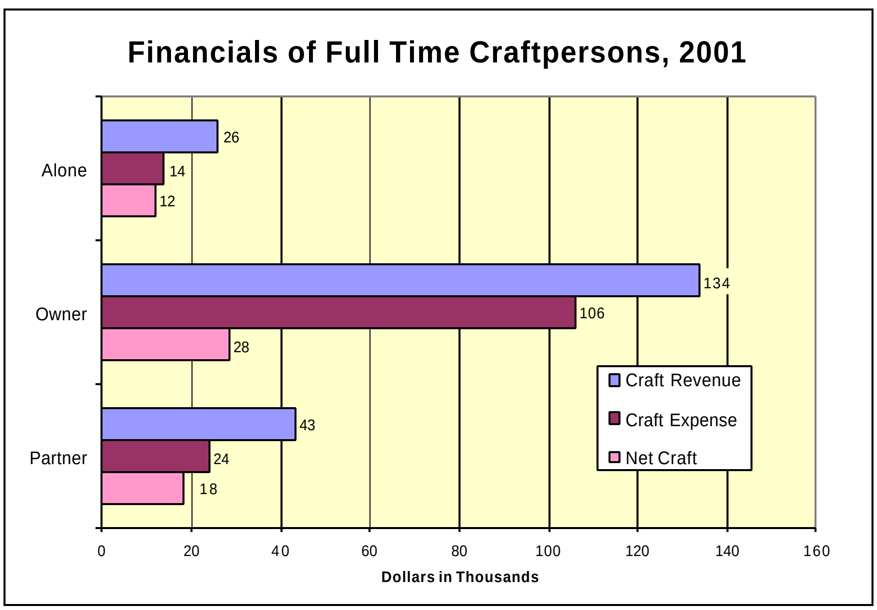
- Data from the 1996 Census indicated that the 5,880 full time "Artisans and Craftpersons" earned an average of $16,900 in 1995. The estimate from the Craft Producer Survey of $17,300 in 2001 is clearly in the same range.

Exhibit 15: Craft Producer Average Studio Revenues and Incomes



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

Exhibit 16: Full time Craftsperson Income and Revenue by Studio Type



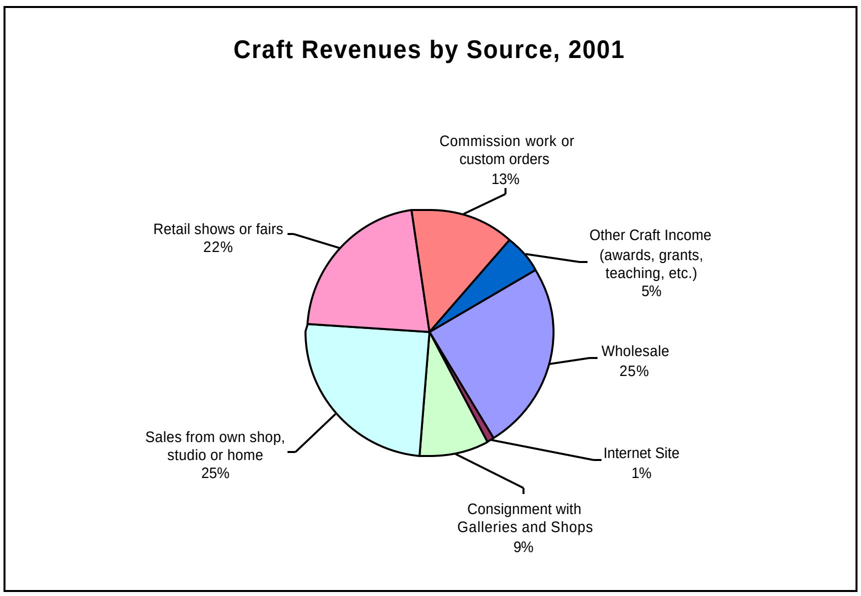
Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- Exhibit 16 shows that among respondents that indicated they were full time craft professionals, average net craft income ranged from $12,000 for those working alone, to $28,000 for those who retained paid employees.
- Total payroll data from studios indicating they had employees show the cost of a full time employee averaged $19,600 in 2001. This estimate is based on an assumption that employees who were not full-time, were equivalent to one third of a full time, full year position.

Revenue Sources

- Exhibit 17 shows that 65 percent of craft revenue is generated from sales directly to consumers through own retail, retail shows, commission work, and other craft-related revenues such as teaching engagements and grants.
- Just over one third of craft revenue was generated through wholesale or consignment sales – forms of sale which would generate additional value added via the markup of retailers. For the purposes of estimating the total value of craft sales, wholesale and consignment sales figures were doubled (the equivalent of a 100 percent markup).

Exhibit 17: Craft Producer Revenue by Source

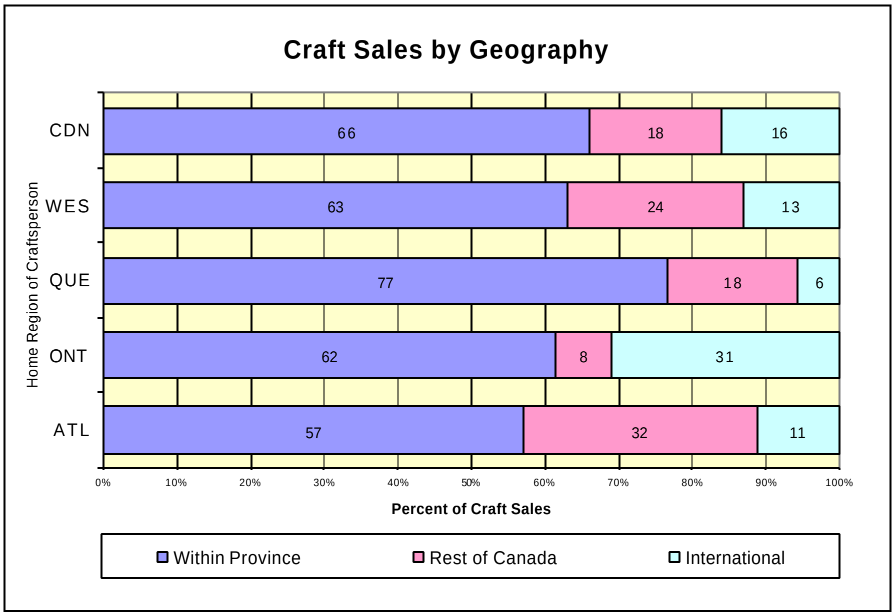


Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

- Exhibit 18 shows that two-thirds of reported craft sales are generated within the provincial borders of the respondent's home province.
- Overall in this sample, total international sales reported by craftpersons are roughly equivalent to total sales to Canadian buyers outside the home province. The mix of sales destinations varies considerably from province to province.

- Producers in Ontario and British Columbia indicate a relatively high proportion of sales in export markets, at nearly one third and one quarter of total revenues respectively.
- Respondents from Québec indicated that they only generated 6 percent of their revenue from export sales. This low proportion is surprising, and may reflect a bias in the responding sample. Another explanation is that in Québec a relatively large proportion of craft is sold through provincial council outlets, including a salon, a gallery and booths at international craft shows. Respondents may not have recorded these as export sales.

Exhibit 18: Craft Producer Revenue by Location of Sale



Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

All the above data from the survey has been presented in terms of proportions of the sample itself, without reference to the universe of craft producers in Canada. We presume the survey sample to be broadly representative of the craft producer population in Canada, though we are clearly less confident of representation when presenting results by province.

The survey of craft producers can offer only a snapshot of current craft sector demographics and studio characteristics. As a one-time survey of the craft sector, information on short or long term trends is not available at this time. Because the survey only covered craft producers, comparisons of results with other cultural industries has not been possible.

2.2.3 SODEC Study of Craft Studios

The province of Québec has established an agency called la Société de développement des entreprises culturelles (SODEC), whose mandate includes providing development support for Québec's cultural industries, including craft as well as publishing, the recording industry, dance, television and motion pictures, and theatre. Additional details on SODEC programs as they apply to craft are provided in Appendix C1.

SODEC provided this project with an unpublished study[11] presenting an analysis of the economic and financial situation of the 111 craft studio enterprises which provided financial statements to SODEC in 1999-2000 and 2000-2001.

Highlights of the craft sector profile studies prior to their own include[12]:

- In Québec, in 1999, there were 652 studios, employing 1500 to 2000 persons, including more than 600 professional craftpersons as defined under Québec law.
- According to a previous study, Québec craftpersons made up about 14 percent of the number of the total of craftpersons in Canada.[13]
- 2/3 of the craftpersons work alone, hiring part time help if needed; 35 percent have 2 to 5 employees, and only 5 percent have more than 5 employees.[14]
- Total craft revenue in Québec was $45 million in 1999, an average of $69,000 per studio. Roughly 70 percent of the studios had less than $50,000 in annual revenue, and 15 percent had more than $100,000.[15]
- The study also indicates retail sales account for 52 percent of revenue, with the Salon des métiers d'art de Montréal alone accounting for 27 percent of the annual sales in the year 2000.

Results for the year 2000-2001 provided to SODEC by program participants form the basis for the analysis of the financial situation of the craft studios. Major observations of the study include:

- The average revenue of the sample is $112,000, a considerable increase from the $69,000 studio average found in the 1999 data.
- Nearly 90 percent of the program participant revenue was generated by sales of craft objects, augmented with 4 percent from SODEC program subsidies, and 6 percent from unspecified sources. The study notes that "This confirms the weakness of public help to enterprises in this sector."[16]
- SODEC program subsidies constituted only four percent of business revenue in craft, compared to six percent in the sound recording and variety entertainment industry, and 8 percent of enterprise revenue in book publishing.

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[11] Marc Ménard et Françoise Montambault (2002), *Les métiers d'art au Québec, esquisse d'un portrait économique*, SODEC, document de travail, Direction générale politiques et affaires internationales, Octobre 2002.
[12] Marc Ménard et Françoise Montambault (2002), p. 6-7.
[13] Groupe de recherche en management stratégique, sous la direction de Vincent Sabourin (2000), *Mise à jour des informations statistiques sur le secteur des métiers d'art et analyse des impacts stratégiques, p. 18.*
[14] Groupe de travail sur les métiers d'art (1998), *État de situation et problématiques des métiers d'art au Québec, p. 6.*
[15] Groupe de travail sur les métiers d'art (1999) *Plan d'action stratégique pour le développement économique des métiers d'art, p. 12.*
[16] Ménard et Montambault (2002), p.12.

- In examining revenues by media categories, the study noted that wood, clay, paper, prints, and bookbinding are the smallest enterprises, with average revenues of $88,000, while glass studios had average revenues of $126,000, and textiles studios averaged $115,000 in revenue.

2.2.4 Large Craft Studios and Enterprises

Though small craft studios dominate craft production throughout Canada, there are also a number of larger studios with 20 or more employees. Six large studio owners or director were interviewed in the course of this study, both to ascertain the degree to which they retained craft production methods and to gather their views on domestic and export market development opportunities.

Some of these larger studios retain craft methods of production even though they employ large numbers of craftpersons. For example, the noted Québec organ maker Casavant Freres creates, refurbishes, and repairs pipe organs all over North America, with a staff of over 80 people, most of whom are skilled craftpersons. Wolff & Associates is a smaller scale operation, with eight full time employees, owned by Hellmuth Wolff, a former Casavant employee, but they too handbuild organs throughout North America with their staff of skilled craftpersons.

The Birks jewellery company also retains a large staff of jewellers and metal smiths engaged in original design and creation of pieces of jewellery and tableware. The Nova Scotia Crystal company employs fourteen full time employees in the manufacture of fine crystal in processes similar to the Waterford Crystal works in Ireland.

Other large firms with international reputations began as small craft production studios, and grew beyond the conventional boundaries of craft, but maintain at least some connection. Firms such as Seagull Pewter in Pugwash, Nova Scotia and Blue Mountain Pottery in Collingwood, Ontario have larger production runs of their own designs and use similar materials as small craft studios, and they may provide lessons in international marketing.

2.2.5 First Nations Craft

Many of Canada’s native communities have continued long traditions of craft production of clothing, jewellery, sculpture, spiritual or religious artifacts, and found markets for these items in Canada and around the world. Support programs for native business exist within Industry Canada, the Department of Indian Affairs and Northern Development (DIAND), Canadian Heritage, and the Department of Foreign Affairs and International Trade (DFAIT). At the moment there are few formal connections between the craft communities within First Nations and provincial craft councils, though there are examples of informal supportive relationships.

No respondents of the Economic Impact Survey indicated they were from First Nations, though a few indicated they had Métis heritage. The survey did not, however, include the Territories where Inuit soapstone sculpture, tapestries, jewellery, and other craft artifacts are produced for sale in southern Canada and international markets. No comprehensive assessment of the numbers of professionals or the realized values of craft work was found in the course of this study.

Given the limited market for craft in the Canadian North, finding markets in the south of Canada, the United States and overseas is particularly important for Inuit and other Native Arts and Crafts. The Ontario Crafts Council's Guild Shop has a gallery devoted to Inuit and Native Art and provided the first Toronto outlet for these objects[17], and in Québec, the Canadian Guild of Craft is specialising in Native and Inuit art.

2.3 Craft Distribution Networks in Canada

There is no national craft distribution network focused on marketing, distribution or export of craft. There are formal and informal networks connecting craftpersons to craft councils, craftpersons to agents and private galleries, craft councils to wholesale and retail shows, and so on. There is, however, no overarching structure that currently permits effective development and coordination of the entire craft sector, from producers through to collectors. Producers have coordinated their efforts through provincial councils, and some distributors participate in these councils as members, but there is no inclusive organization to coordinate marketing and distribution efforts across government, private for profit, not-for-profit organizations engaged in promoting Canadian craft in Canada and to international audiences.

The Canadian Crafts Federation / Fédération canadienne des métiers d'art (CCF / FCMA) is providing a national level structure for information and action for producers, but not for sales. The provincial councils are well-established, and are currently the most organized and effective level for promoting craft markets. Their mandates are quite divergent, with some working entirely on information and support, while others venture into marketing, sales and export. This study, as a result of the concerted efforts of provincial craft councils is intended to point towards the need for the establishment of a national structure focusing on marketing, distribution, and export of craft.

2.3.1 Background

The Craft Producer Survey indicated that roughly two-thirds of the craft revenue of respondents was generated through direct sales to the customer, through their own retail shops, in retail shows, commissions, and in other craft related revenue. The remainder of craft revenue is derived through distribution intermediaries of one type or another. The major categories of such intermediaries include craft councils, galleries, boutiques, shops and shows.

A Price Waterhouse (1994) study, the SODEC (2003) study, and the *Craft Producer Survey* conducted for this study show direct sales are the marketing mode most used by Québec craftspeople. Success depends on the participation at craft fairs and exhibits, as well as on sales at studios or workshops. For many craftpersons direct sale is the only marketing method used. Selling at craft fairs is the favourite method of craftspeople because, in such an environment, craftspeople find an audience interested in the hand made rather than industrially produced goods, and they can distribute their products without middlemen. Some of the greatest success stories involve craftpersons who

[17] The web address for the Guild Shop is the Ontario Crafts Council web site at www.craft.on.ca / shop / index.html.

continue, even after 25 years in the craft business, to assume in whole or in part the representation and distribution of their own products.

Selling a craft object requires not only general sales and marketing skills, but also a deep knowledge of the product, its significance, its production techniques, and the indicators of quality. Some buyers view an intermediary as an imperfect substitute for the craftsperson for discussing the nature of the object. Sale of craft objects are often enhanced by direct and personal approaches because the specialized knowledge or commentary of the creator becomes part of the buyer’s sense of value.

Some craftpersons are also reluctant to give up the economic value generated by the retail sale because of the relatively low incomes they often generate. Giving up a commission ranging from 15 to 60 percent of the selling price is often difficult for a craftsperson. The survey results tend to reinforce the view that a relatively small proportion of craft sales involve a marketing or sales intermediary.

Sabourin (1999) notes that a distribution network for an individual craftsperson or studio takes between three to five years to mature. Creation of such networks requires perseverance, but the payoff can be considerable. One of the most interesting strategies for marketing craft is the efficient use of relationships with the press. This strategy, which essentially means sending press kits, contacting journalists, participating in interviews, and submitting articles on new craft collections, is much more effective than the purchase of advertising space or time.

Craftpersons also sell their products in boutiques and galleries specialized in craft or in regular boutiques where their products have to compete with industrial objects that one can find in most “gift” and “consumers’ goods” wholesale shows, and regular boutiques. Historically, craft has not been protected from international competition through trade barriers, as were other cultural industries. Craft products from other nations flow into Canada on the same terms as manufactured goods, both low-end and high-end.

Producing an estimate of the number of retail and wholesale businesses involved in distributing craft products is a challenging task. There are no more than a dozen high-end private craft-focused galleries, a large number of retail outlets that sell at least a little craft and a small number of retail and wholesale shows, some of which are not devoted exclusively to craft. We interviewed representatives of 13 boutiques and show organisers well-known in the sector, roughly half of whom were not willing or able to reveal the sales revenue figures of the companies they represented. Retail sales estimates are further complicated since many outlets do not sell craft exclusively and separating craft-related sales from other categories such as visual art or giftware is not a trivial exercise.

2.3.2 Provincial Craft Councils as Distribution Agents

Despite the limited resources of most provincial craft councils, these organizations are highly productive in providing distribution channels for the craft produced by their members:

- Nine of the ten provincial craft councils coordinate a total of more than 100 exhibitions each year. Councils in Alberta and Saskatchewan produce the most exhibitions – 20 to 25 in each province.
- Councils organize more than 120 major events annually that attract between 700,000 and 1,000,000 visitors.
- Six councils operate full-time public galleries and museums and boutiques to exhibit and sell fine craft.
- About half the councils organize large sales events and shows, mostly retail. These promote the work of thousands of members and attract tens of thousands of visitors.
- Some craft councils develop or provide information for craft maps that facilitate craft tours and trip planning for craft buyers.

Exhibit 19: Craft Sales Mediated by Provincial Craft Councils in 2002

Jurisdiction	Sales of Craft Shop, Galleries, Boutique or Internet Site (000s)	Total Sales of Craft through PCC Sponsored Craft Shows (000s)	Sales of Craft through PCC Participation in International Shows (000s)	Sales of Craft through Other Activities (000s)	Total PCC Mediated Sales (000s)
Canada	**$4,322**	**$10,045**	**$200**	**$163**	**$14,730**
NL	$745	$500	$0	$100	$1,345
NS	$0	$460			$460
PEI	$371	$85			$456
NB*					
QC	$1,300	$9,000	$200		$10,500
ON	$1,329	$0	$0	$13	$1,342
MB	$76				$76
SK	$15			$50	$65
AB	$212				$212
BC	$274				$274

*Note: Data from New Brunswick was not available at time of writing.

Source: *Economic Impact Survey of Provincial Craft Councils in 2002*

- Some councils are assembling permanent craft collections; the Ontario Crafts Council's permanent collection is housed at the Canadian Museum of Civilization.
- Most provincial craft councils also are involved in at least some export support activity. Over half of the councils also produce directories, databases, maps, studio tours and/or advertising to attract Canadians and international visitors to fine craft destinations.

- All the councils maintain web sites and publish magazines or newsletters. Most publish other print material for promotional purposes.

The Craft Council of Newfoundland and Labrador, with an online store supported by a secure server, is currently the only provincial craft council providing direct ecommerce through the Internet.

2.3.3 Canadian Private Galleries, Boutiques, Shops, and Online Retail

In addition to the outlets run by provincial craft councils there are a small number of private galleries primarily devoted to sales of high-end one-of-a-kind or limited edition fine craft. Proprietors of nine craft retail businesses across the country were interviewed for this study.

These galleries and shops sometimes pay for the objects in advance, but often they are sold on a consignment basis. Retail mark-ups are typically 100 percent, meaning that the artist can expect to receive about half the retail value of the object.

High-end private galleries specializing in fine craft include:

- Prime Gallery, Toronto
- A Show of Hands Petroff Gallery, Toronto
- Sandra Ainsley Gallery, Toronto
- Lafreniere and Pai Gallery, Ottawa
- Elena Lee Verre d'art, Montreal.

Some craft distribution businesses offer websites and internet sales, including:[18]

- Handsmiths (which also has a shop in Halifax, and other outlets)
- Art Market Productions (which also runs an annual craft show in Calgary)

Some craft studios also participate in the EconoMuseum® Network founded by Cyril Simard in Québec in 1992. The Société internationale des entreprises ÉCONOMUSÉE® has adopted a mission "to showcase traditional trades and savoir-faire by favouring the establishment of ECONOMUSEUM® across the country, so as to offer the public a culturally innovative tourism product."[19] There are currently 36 companies in the network, including 27 in Québec, and two each in New Brunswick, Newfoundland, and Nova Scotia. Though not all these enterprises would be considered part of the craft sector, many include studios in glass work, musical instruments, ceramics, bookbinding, leather work, metalwork, and fibre.

There are also many retail boutiques displaying and selling works of craftpersons, as well as industrial gifts and imported goods.

- The Newfoundland and Labrador tourist guide lists 160 shops that sell craft.

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[18] Web addresses for these distribution agents are available in an appendix.

[19] From the EconoMuseum website: www.economusees.com

- The Prince Edward Island study released in 2001 indicated that there were 77 retail craft outlets operating at some point during the year, including 27 that were open ten months or more per year.[20]
- The CMAQ notes that they are more than 300 retail boutiques in Québec alone.
- There are no comprehensive statistics on craft retail outlets in Ontario, but there are 28 craft retail establishments in Toronto alone.
- The Alberta Craft Council promotes 35 studios and galleries in its printed and on-line maps and guides, and has another 5 to 10 commercial galleries and shops as members.

2.3.4 Craft Shows in Canada

In addition to the shows organised by the provincial craft councils, most major Canadian cities have large craft shows running from three to ten days, often during the late fall holiday shopping season. One-of-a-Kind promotes retail craft shows in the spring and late fall in Toronto, and in the summer in Montreal. Signatures Craft Shows promotes retail Christmas Craft shows in Ottawa, Winnipeg, Edmonton, London, Vancouver, and Toronto.

Craft producers also have opportunities to sell wholesale through several gift and design shows. The Atlantic Craft trade show is currently the only regular wholesale show specialized in craft in Canada, but there are also wholesale gift or design shows in which craftpersons participate. The Toronto International Gift Fair is held each January and August. Management of this fair was taken over by George Little Management (GLM) in 2000, and it maintains a *By Hand* section which is now run by Signatures. In 2002, the *By Hand* section included objects by about 160 craft exhibitors in 2002. Similarly the Vancouver Gift Show has a By Hand Section organized by Signatures. [21] There is also the Canadian Gift and Tableware Association (CGTA) wholesale show in Toronto in August, and the Salon International du Design Intérieur de Montréal (SIDIM) each May.

2.3.5 Public Galleries and Museums

Public galleries and museums often offer craft in their gift shops, sometimes in cooperation with provincial craft councils, but not many present regular craft exhibitions. The Ontario Crafts Council has recently initiated a discussion with public galleries and museums in Ontario to promote increased exhibitions of craft. This initiative, called the Public Galleries Craft Alliance, is an example of cooperation that could both increase the number of craft exhibits as well as lower the average cost per gallery showing by sharing curatorial cost and catalogue production costs.

This discussion has also extended to CCF/FCMA where the idea would focus on exhibits of Canadian craft in cross-country and international tours.

[20] Morley Pinsent and Gerry Gabriel (2001). Survey Results For: Prince Edward Island Handcrafts Retailer Questionnaire. Prepared for Prince Edward Island Crafts Council.
[21] Grace Butland, "The Canadian Craft Market," *Craft Report*, June 2002.

2.4 International Markets for Craft

A strategy for developing international markets for craft made in Canada should build on the success of current efforts as well as actively seeking new markets. This section describes the recent experience of craft producers in selling into American, European, and other world markets, as using data from the *Economic Impact Survey of Canadian Craft Producers in 2001*, as well as a follow-up survey of respondents who indicated significant export sales ($5000 or higher in 2001) or craft sales revenues of $50,000 or more.

2.4.1 Export Profile of Craft Producers

Craftpersons working in the craft studios included in the *Economic Impact Survey* indicated that 16 percent ($100 million) of their sales were generated through direct exports, in addition to sales to foreign tourists who purchase while visiting Canada. This is a surprisingly strong export performance given the dominance of micro-enterprises in the craft sector. Canadian Heritage reports that based on Statistics Canada Trade data, exports of Visual Art to the USA in 2000 totalled $126 million. As stated earlier, in trade statistics, as in other economic statistics, craft activity is spread over a variety of harmonized export codes and industry groups and is therefore difficult to isolate.

Craft Export Survey Sample Characteristics

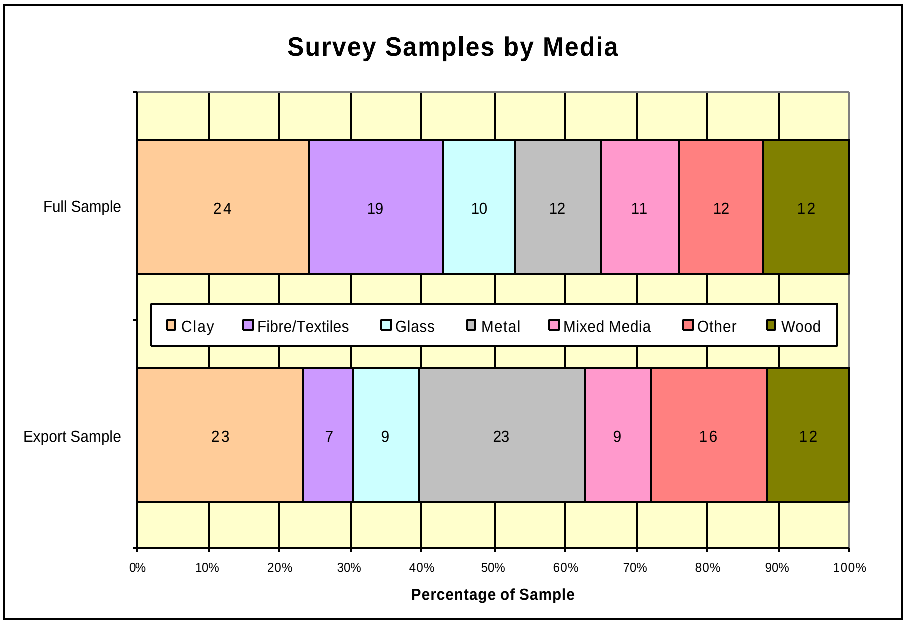
A follow-up survey of certain respondents to the Economic Impact Survey of Canadian Craft Producers was conducted in the fall of 2002, to assess the characteristics of exporters and non-exporters, to determine which marketing methods were considered most useful by these studios, to ascertain the destination of these exports, and to solicit suggestions on the programs that might be considered useful to promote domestic and international markets for Canadian craft. The Craft Producers Export Survey sampling frame was drawn from studios that responded to the Economic Impact Survey, focusing on responding studios with revenues of at least $50,000 and/or export revenues of $5,000 or more in 2001.

A total of 196 craftpersons were telephoned for the Craft Producers Export Survey. Of the 49 craft studios for which a live person was reached, a total of six persons declined to respond to the export survey, generating a response rate of 88 percent. Among the 43 responses to the survey, all but two were full time craft professionals; one was a part time professional, and one was a student or aspiring professional.

Export Survey Results

Exhibit 20 compares the representation by media in the *Craft Producers Export Survey* with that of the *Economic Impact Survey of Canadian Craft Producers*. The export survey sample is broadly comparable to the overall sample obtained for the producer survey with two notable exceptions: metal is relatively over-represented in the export survey, while fibre and textiles are under-represented. These are likely due to the selection criteria of the export sample, based in part on the selection criteria of annual sales of at least $50,000 and/or exports of $5,000 or more.

Exhibit 20: Producer and Export Survey Samples



Source: *Economic Impact Survey of Canadian Craft Producers in 2001* and the *Craft Producer Export Survey for 2001*

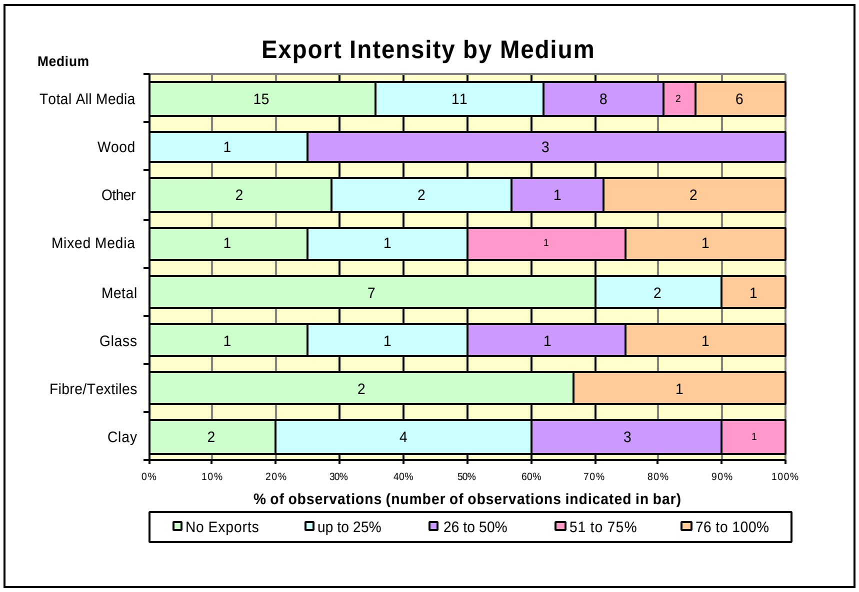
The sample of 43 completed interviews in the export survey had the following additional characteristics:

- 33 of 43, or 77 percent of respondents, said they had displayed their work in shows or galleries outside their home province, including 20 who have shown their work in the US and abroad.
- 21 of 43, or 49 percent said their work was included in public collections, including 10 in local collections, 16 in provincial collections, 7 in national collections, and 6 in international collections.
- 28 of 43 or 65 percent said they had received a bank loan to support their business.
- 13 of 43, or 30 percent had received some form of support from business or entrepreneurship programs.
- 21 of 43, or 49 percent of studios indicated they had received one or more grants supporting the export of craft, including six studios indicating a federal grant had been received, 19 studios with provincial grants, and two studios with local grants.
- 26 of 43, or 60 percent said they had received at least one prize for their work with most citing province-wide, craft show, or national awards.

Export by Craft Media

Dividing a sample of 43 by any category is a very shaky proposition because the chances that such a small sample accurately reflects the broader craft population is slim. Nevertheless, Exhibit 21 shows the division of the export sample by craft media and percentage of revenues generated through export, with the number of observations indicated in each bar. Overall, a third of the export sample had no exports (despite annual revenues in excess of $50,000 in 2001), one quarter of the sample received up to 25 percent of sales from export, and just less than 40 percent, or 16 studios, had export sales accounting for more than 25 percent of revenues.

Exhibit 21: Percent of Studios by Export Intensity Category



Source: *Craft Producer Export Survey for 2001*.

In this sample, those working in the metal and textiles media were least likely to export, though all media except wood had at least one studio for which exports generated over half of revenues. On the other hand, all of the four studios working in wood generated at least some revenue from exports.

Though the sample is very small, there seems to be little basis for excluding any one media from programs promoting exports. All media seem to be able to export their products to some extent.

Home-based Studios and Export

One of the concerns about export readiness in the craft sector is a sense that small scale, home based producers will have difficulty serving export markets. To some extent this concern is warranted: several producers indicated that they were already at the limit of their capacity while serving only domestic markets.

On the other hand, the Export Survey results indicated that those working from home-based studios were slightly more likely to be exporters than those with studios off the home property. Those selected into the sample that had no exports were more likely to have a studio off the home property than the average craft producer overall. We take this to be an indication that in craft, home based production is no barrier to export.

Exhibit 22: Export and Location of Studio

	Frequency	Percent of Sample (42)	Number of Exporters	Proportion Exporting
Sample	**42**	**100%**	**27**	**64%**
Home Based Studio	33	79%	22	67%
Non-Home Based	9	21%	5	56%

Source: *Craft Producer Export Survey for 2001*.

Exhibit 23: Export and Incidence of Training

	Frequency	Percent of Sample (42)	Number of Exporters	Proportion Exporting
Total Responding Sample	**42**	**100%**	**27**	**64%**
No Training in Last Five Years	**23**	**55%**	**14**	**61%**
Any Training in Last Five Years	**19**	**45%**	**13**	**68%**
Craft techniques and related areas	14	33%	9	64%
Sales and Marketing	9	21%	7	78%
International Trade and Marketing	6	14%	4	67%
Export Legal Issues	4	10%	2	50%
Accounting and Finance	4	10%	3	75%
Intellectual Property/Copyright	2	5%	2	100%
Other Training	4	10%	2	50%

Source: *Craft Producer Export Survey for 2001*.

Training and Export

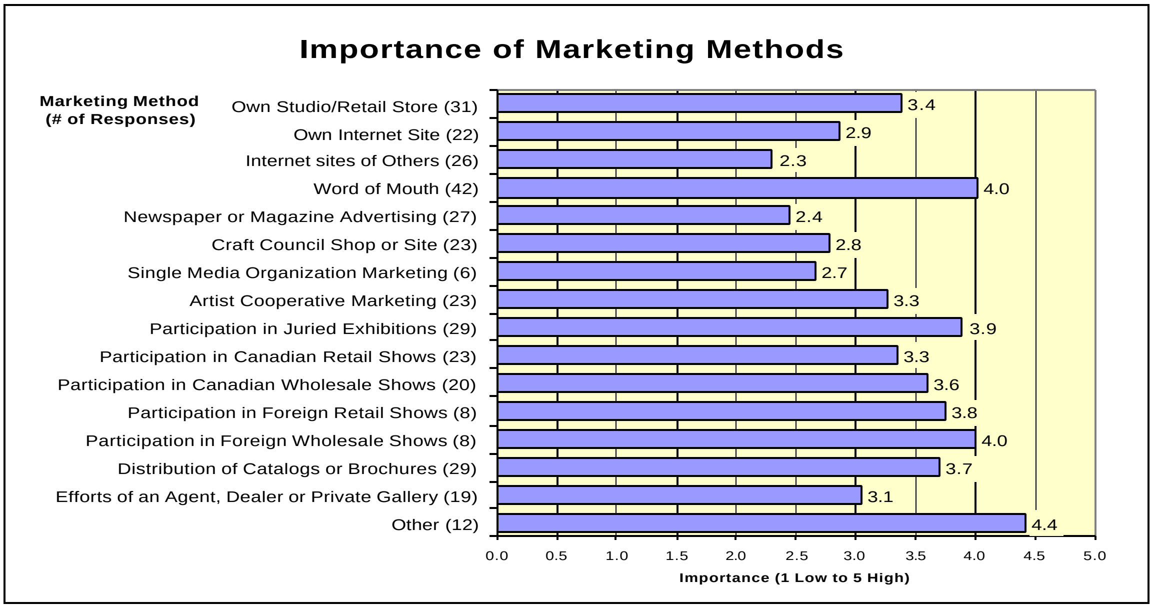
Just over 45 percent of the sample, or 19 respondents to the export survey reported taking some form of training in the previous five years. Fourteen of the eighteen who took training, participated in craft technique development courses. Nine persons, or half the persons who took any training, or 21 percent of the survey interviews took some form of sales and marketing training.

Only six of this sample had taken training in international trade and marketing, four of whom were from the Atlantic Provinces, and the other two from the West. Given the small sample, it is difficult to draw conclusions from this observation, other than the fact that training in international trade techniques appears to be available in these regions, and that distance from Central Canada is not an insurmountable barrier to the availability of training of this type.

Marketing Methods for Craft

Respondents to the export survey were asked to rate a series of marketing methods for their perceived importance in generating craft sales. Participants were asked to rate all marketing methods they used as shown in Exhibit 24.

Exhibit 24: Rating Marketing Methods



Source: *Craft Producer Export Survey for 2001*.

The number of respondents indicating they used the method is noted in brackets behind each method. The highest ranked among these methods was "Other" which consisted of a variety of mostly unique practices used by the studios including:

- the use of a toll free number
- getting professional musicians to use and demonstrate musical instruments
- direct mail
- participation in WholesaleCrafts.com an American-based international website for craft wholesale.

The single most common response to the query on marketing methods was ''word-of-mouth" cited by 42 of the 43 respondents. It was also the second most highly ranked method of marketing, which is not unusual in small scale studios or enterprises. Note also that participation in shows, both domestically and internationally is seen as a very effective method of marketing. Relatively few indicated that they relied on foreign shows, but those who did, rated them as quite important to their marketing strategy.

Exhibit 25 shows the geographic regions to which respondents in the sample sent craft. All but one of the exporters had sales in the United States, and US exports generated an average of 40 percent of craft revenue for the studios in this sample.

The United Kingdom and the rest of Europe are the next most common markets among this sample, with 10 exporters each. France and Belgium were the most commonly cited destinations for exports on the European continent, with Germany and Switzerland also noted. In Asia, Japan was the one nation cited as an export destination.

Exhibit 25: Exports by Region

Region	Number of Exporting Studios	% of Exporters (Out of 27 exporters)	Average percentage of Total Revenues
All Regions	**27**	**100.0**	**42.2**
United States	26	96	39.2
Rest of Europe	10	37	6.5
United Kingdom	10	37	3.8
Asia	5	19	2.0
Australia	4	15	1.3
Africa	2	7	1.0
Latin America	0	0	--

Source: *Craft Producer Export Survey in 2001*, Peartree Solutions, Fall 2002.

2.4.2 Craft Trade Statistics

Like domestic market statistics, international trade statistics for craft are not readily available, for many of the same reasons including the fact that craft products are often combined in the same categories as mass produced items.

Additional research should provide additional insight on the current markets for craft in Canada and greatly enhance the ability to monitor trends in craft exports. Even if not all craft products can be accurately identified within the harmonized code structure used to monitor export activity, those that are identified could serve as a barometer for the wider category of craft objects.

2.4.3 Export Market Information

The Department of Foreign Affairs and International Trade (DFAIT) produces a series of reports on markets for craft, including native craft, gifts and the visual arts in various regions of the United States, the United Kingdom and several member countries of the European Union. Some of these studies provide separate observations on markets for craft and the visual arts, but many do not provide sufficient focus on craft markets to give craftpersons a clear picture of the specific opportunities for their media or work in the region of study. Many of these studies have been included in the bibliography of this study.

DFAIT also publishes a newsletter *New Directions/Nouvelles directions*[22] specifically aimed at gift and craft producers, providing market information about US markets. DFAIT and Export Development Canada also have generalized export readiness testing and planning materials online, including Virtual Trade Commissioner, various pieces of export market intelligence, and organization of Trade Missions.

[22] The online version of the newsletter can be found, upon registering and obtaining a password, at: www.infoexport.gc.ca/docs

While these studies provide useful background for those looking to enter export markets for the first time, several of those interviewed for this study suggest that more detailed and timely information according to the various craft themes and / or media are needed. International craft marketing opportunities are often episodic rather than constant, being associated with major international conferences and exhibitions. Like other major international events, however, the locations of these opportunities are often decided five or more years in advance, so planning for appropriate representation is both possible and necessary.

Increasingly precise information about specific opportunities and events by market theme and media are needed to alert craft producers to important market events. Such studies would be an important anchor to the craft sector strategy for international market development.

Reliable trade statistics for craft is also important for strategies for developing international markets for craft. These statistics can provide important indicators of the flows of specific craft items to particular countries and can also serve to monitor the success of strategies implemented by the craft sector.

The Trade and Investment Branch of the Department of Canadian Heritage has developed trade statistics on exports of many Canadian cultural goods.[23] Because of the challenges of identifying craft within the prevailing statistical framework, craft exports are generally not well-identified in these statistics, though the department is interested in work that identifies the craft sector more clearly in trade statistics classifications. At the moment, fine contemporary craft items may be included in the Visual Arts category, while the work of bookbinders may be included in the Books and Print category. The general conclusion appears to be that craft is largely unrecognized in the cultural trade statistics.

The recently published *Face of the Future* report commissioned by the Cultural Human Resource Council is a recent example of this point. The report notes “Although Canada is *virtually absent* [italics added] from the international crafts market, there are many opportunities for international business and expansion of the crafts sector.” The survey conducted for this study provided an estimate of $100 million in craft exports from Canada in 2001, or roughly 16 percent of craft revenues. While this is clearly much more than *virtually absent*, many of those consulted in the course of this study would agree that there are many opportunities for international business.

United States

The American craft market is widely seen as the largest and more important for craft in the world. Reasons cited for this are that the American education offers both undergraduate and graduate degrees in craft disciplines, Americans have the disposable incomes to collect cultural works, and the number and size of American cities are sufficiently large to sustain more private galleries and larger shows.

American markets for craft are very large compared to the domestic Canadian market.

[23] These documents were reviewed in draft form. Final documents were not available at the time of writing.

In 2001 the Crafts Organization Development Association (CODA) released the results of the first survey of craft activity in the United States. Survey analysis resulted in an estimate of craft activity in the United States amounting to US$13.8 billion in 1999, including a direct economic impact of between US$8 billion and US$10 billion. The survey estimates that between 107 thousand and 127 thousand craftspeople were active in the United States in 1999/2000.

Overseas Markets

Comprehensive information on the size and breadth of craft markets in other countries is generally difficult to find. As in Canada and the US, craft activity in most countries is not separated in national economic statistics from manufacturing or other cultural activities. Detailed information on international craft fairs and expositions are available on the CMAQ website.[24]

Work In Progress

The craft sector has been working for several years as part of the Cultural Trade Advisory Board (CTAB), now officially a Trade Team Canada – Cultural Goods and Services (TTC-CGS) Committee, on an Export Development Action Plan in conjunction with the Trade and Investment Branch of the Department of Canadian Heritage. This official action plan guide the Department of Canadian Heritage, Trade Routes program, and ultimately other government agencies, in providing programs and funding for cultural exports.

2.4.4 International Craft Shows and Galleries

Participation in international craft shows and representation in international galleries is generally regarded as a sign of top level success in the craft sector. Such achievements are often associated with higher average prices for pieces sold and greater demand for the objects produced by a craftsperson. Exposure in these markets tends not to come easily, however, and craftpersons usually have the bear the risk of paying for travel, accommodation, and shipping and insurance for the articles presented for display. Good advice from knowledgeable craft distributors, as well as financial assistance with out-of-pocket expenses, can reduce these risks to some extent.

Canada's Department of Foreign Affairs and International Trade (DFAIT) has supported the publication of a *Marketing Guide for Fine Contemporary Craft in the United States*. Initially undertaken by the Crafts Association of British Columbia at the impetus of the CCF/FCMA, the publication work was released in November 2002. The *Guide* "is meant to assist Canadian makers of high-end, one-of-a-kind contemporary craft who wish to sell to retail galleries in the U.S. - whether they are seasoned exporters or those looking at the American market for the first time."[25],[26]

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[24] See the CMAQ website at http://www.metiers-d-art.qc.ca/inforoute/index.html

[25] The work was co-authored by Lou Lynn of the Kootenay School of the Arts Cooperative and Dana Boyle of the Canadian Consulate in Minneapolis. The study is available at: http://www.infoexport.gc.ca/ie-en/DisplayDocument.jsp?did=14331 .
Note that a brief registration process is required to access the document.

In addition to prominent private galleries exhibiting craft, several major retail and wholesale craft shows in the United States are recognized showcases for the finest contemporary craft produced all over the world. Among these are:

- The Buyers' Market of American Craft (the "Rosen Show"), a wholesale show for craft only, held twice annually in Philadelphia. It is the world's largest venue for craftpersons to meet qualified buyers from American galleries, and boutiques selling quality craft.
- Sculpture, Objects, and Functional Art (SOFA) shows are held in New York in the spring and in Chicago in the autumn. The shows accept only craft galleries and art dealers as exhibitors, providing a collective forum to display and sell works by the craftpersons they represent in their home galleries, to private collectors and buyers. This is generally regarded by many in the craft sector as the most important show for contemporary fine craft.
- The American Craft Council shows (wholesale and retail), where Canadians are not eligible to be regular exhibitors, but could participate in a separate show held at the same time, as do other organizations and exhibitors.
- The Philadelphia Museum of Art Craft Show, which in recent years has featured selected craft artists from a different country at each annual show. CCF/FCMA has been invited coordinate the participation of craftpersons from Canada for the November 2007 show.

One of the issues facing Canadian craftpersons wanting to participate in US retail shows is the legal restriction preventing non-Americans from selling directly to customers. There are methods to deal with the legal requirements such as hiring an American salesperson, hiring an agent or selling through a central cash.

Exposure to overseas markets is even more difficult and expensive than the American market. Participation in conferences and associated exhibitions of international guilds and craft organizations is an important way to develop networks and explore exhibition and sales opportunities. Even if held in North American cities, these conferences attract international audiences that provide connections to craft markets throughout the world. Since the location of many conferences changes from year to year, they may pass under the radar of government trade representatives who are typically regionally focused.

- France, Italy, the United Kingdom and Germany were identified as promising markets for Canadian craft through consultations for a Cultural Trade Advisory Board (CTAB) effort under Canadian Heritage's Trade Routes program.
- The Chelsea Crafts Fair, now in its 23rd year, which "continues to be regarded as Europe's leading event for contemporary design-led craft and applied arts. With an inspirational mix of new talent and established makers, 'Chelsea' continues to

[26] In addition, CMAQ research in 2000 by intern Annie Choinière documented US "reps" interested in Canadian craft. The document is available on the CMAQ web site at www.metiers-d-art.qc.ca.

be the premier focus for contemporary craft, and is internationally recognised as Europe's leading event for quality, ingenuity and individuality.” [27]

- Craft councils in Atlantic Canada are considering supporting an expedition of production craft businesses to the Birmingham Gift Show in the Fall of 2003.
- The Glass Art Society (GAS), an international non-profit organization founded in 1971, holds a conference each June with a different host city each year, including Amsterdam in 2002, Seattle in 2003 and New Orleans in 2004. The conference offers important networking opportunities, and hosting the conference offers artists in the host region city an opportunity to showcase their talent and works. The Ontario Crafts Council led the CCF Trade Mission to the Amsterdam conference in 2002.
- The CMAQ hopes to attract the annual conference of the Society of North American Goldsmiths (SNAG) to Montreal. Conferences through 2007 are slated to be hosted by American cities.

2.4.5 Export Programs in Canada

Federal programs have focused on providing relevant information on export readiness and particular export markets, rather than financial assistance. At the moment, there are few formal federal programs designed to assist individual craftpersons or studios to promote their work to an international audience.

The *Craft Producers Export Survey* conducted in support of this profile showed that the United States is by far the most important foreign market for Canadian produced crafts. The size and proximity of the American market is the natural reason for this, as it is for many Canadian industries and products. The scale and concentration of the American market makes it attractive for craftpersons to access, without having to engage in the enormous task of educating and cultivating the Canadian audience for their work.

Canada has a limited number of programs supporting the exports of individual craft studios. DFAIT’s Program for Export Market Development – Trade Association (PEMD-TA) is the oldest of these programs. PEMD-TA has been used for craft export projects in the past, but some of its features are unsuitable for the situation of craft, including the fact that programs are too short to be effective for developing craft markets, and that the 50/50 matching requirement is very difficult for most associations and first time exporters.

The federal program Trade Routes, sponsored by Canadian Heritage, supports research on international markets for craft, and provides funds for cultural export development projects. The craft sector is participating in these programs under the auspices of CCF/FCMA.

In Eastern Canada, the Atlantic Trade Winds Agency is a cooperative effort among the four Atlantic Provinces supported by the Atlantic Canada Opportunities Agency (ACOA), the federal government’s development agency in eastern Canada. The aim of Trade Winds, located in the New England Gift Center in Bedford, Massachusetts is to:

[27] http://www.craftscouncil.org.uk/chelsea2002/index.htm

> …assist successful Atlantic Canadian manufacturers who are interested in exporting to the New England market. The primary function of the Atlantic Trade Winds Agency showroom is to secure manufacturer's sales representatives for the participating companies.

Briefly described, the Atlantic Trade Winds Agency is:

> a permanent wholesale craft, gift and decorative accessories marketplace. The showroom presents a unique opportunity for regional manufacturer's representatives to view prospective Atlantic Canadian lines. In addition, the showroom has a full-time manager who works closely with the participating Canadian companies, the Canadian Consulate in Boston, and local rep agencies to introduce Atlantic Canadian products into the New England market.[28]

Western Economic Diversification (WED), the Canadian federal government's development agency in Western Canada, provided assistance for studies of craft in Manitoba and Alberta in the early 1990s. Further, WED provided support for a large wholesale marketing project developed by the Alberta Craft Council, but the project was eventually cancelled because it required unattainable short-term results such as annual sales growth rates of 200 percent.

Exhibit 26: SODEC Program Expenditure for Craft

Program	1997-98		1998-99		1999-2000		2000-2001		2001-2002	
	#	$	#	$	#	$	#	$	#	$
Craftpersons & Enterprises	42	136,100	51	168,025	66	240,708	152	872,174	130	761,473
Production & commercialisation	39	119,725	43	136,825	58	177,823	100	546,363	76	427,228
Business Startup		0					22	73,703	23	76,538
Total	81	255 825	94	304 850	124	418 531	274	1 492 240	229	1 265 239

Source: Marc Ménard et Françoise Montambault, *Les métiers d'art au Québec, esquisse d'un portrait économique*, SODEC, document de travail, Direction générale politiques et affaires internationales, octobre 2002.

In Québec, SODEC has a program to share with the craftperson, the risk associated with the high cost of developing export markets by participating in foreign wholesale and retail shows, and developing export plans. Since 1997-98 the craft sector in Québec has been eligible for SODEC program support among cultural industries. As shown in Exhibit 26, there are three major categories for program support.

[28] From the Canada and Newfoundland and Labrador Business Service Network website: http://www.cbsc.org/nf/guides/foodandbev/research_q10.html

2.4.6 Export Support Programs in Other Countries

Most countries interested in promoting craft export seem to be willing to provide soft program support through assistance with organizing the sector and providing market intelligence; some also provide direct support to studios to show or sell their objects in other countries. Great Britain, France and Australia have programs designed to promote craft artists individually and collectively in international markets (for additional detail please see Appendices C1, C2, and C3).

United Kingdom

The Crafts Council of the UK provides support for galleries to participate in showcase international events for craft including SOFA and the New York International Gift Fair.

France

One of the major financial assistance program for which the craft community in France is eligible is the Fonds d'Intervention pour la Sauvegarde de l'Artisanat et du Commerce or FISAC (*Intervention Fund for the Safeguard of Craft and Commerce*). This program is mostly used to assist French businesses with the maintenance and expansion of their commercial space, but is also used for sector studies when craftspeople are faced with major change (economic, technical, technological, social or regulatory).

Australia

Australia maintains several programs and initiatives intended to promote domestic and international market development for craft. The Australia Council maintains a Visual Arts and Crafts Board (VACB) which is active in promoting Australian craftpersons and market development, while Craft Australia is a non-governmental craft organization supporting craft markets and practice.

According to the *Report of the Contemporary Visual Arts and Craft Inquiry* released in June 2002, the Australia Council funding of AUS $6.3 million (CDN $5.6 million) provided to the VACB in 2000-1 represented 53 percent of the Council’s funding for contemporary visual arts and craft. In addition, the Council’s Audience and Market Development Division spent AUS $1.5 million (CDN $1.3 million) on:

> ”…developing audiences and markets nationally and internationally for Australia’s artists and arts companies. The program’s support for projects in the contemporary visual arts and craft area include participation in major recurrent international art fairs and craft fairs; development and management of the visual arts components of major international showcase events, including the Venice Biennale; and support towards the international marketing and promotion of Australia based major events such as the Bienale of Sydney, the Asian-Pacific Triennial and the Melbourne Art Fair”.[29]

Craft Australia also has a number of programs that support international market development for Australian craft.

[29] Myer (2002) , p. 298.

- Craft Australia has an accreditation program called Craftmark, intended to increase the sales of Australian craft, to expand the range of distribution and to further improve the profile of Australian contemporary craft. Craftmark accreditation is awarded to professional craft practitioners and retail outlets. Craftmark accreditation is an entry point for Professional Affiliation with Craft Australia providing a range of benefits including website promotion.[30]
- Craft Australia "commissions a range of exhibitions to present the best of contemporary Australian craft. Working with national and international agencies, the exhibitions are shown overseas and within Australia".
- Craft Australia works with overseas agencies to create opportunities for professional Australian craft practitioners to participate in international residencies.
- Since 1991 Craft Australia has developed and managed export activities for craft practitioners. Export programs are currently offering assistance for craft market development for the United States (SOFA, for example) and Germany.[31]

2.5 Craft Organizations in Canada

The craft sector in Canada is supported by a variety of organizations that assist in coordinating activities among craftpersons, promoting craft and educating the public, and in providing training and other development opportunities for the craft community.

2.5.1 Provincial Craft Councils

Canada's ten provincial craft councils provide a unique network of marketing services and coordination activities for the craft community, though they vary substantially in size, role and impact. The Conseil des métiers d'art du Québec has the largest operating budget with expenditures of roughly $6.5 million, the smallest budget is the $130,000 administered by the New Brunswick Craft Council. The Ontario Crafts Council has the largest membership with some 2,400 members, while the Prince Edward Island Crafts Council has the smallest membership base with 150 members.

The combined annual budgets of the provincial craft councils were $8.5 million for 2002. The combined membership is 6000-7000 individuals, augmented with roughly 125 member groups such as guilds. Councils have a variety of funding and revenue sources, including:

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[30] Drawn from the Craft Australia web page at: www.craftaus.com.au/craftmark/information_about_craftmark.htm

[31] www.craftaus.com.au/International/exportintroduction.htm

- operating and project and employment creation assistance grants from governments and arts councils
- membership dues and service fees
- income from sales events, classes and workshops, studio rentals, and listings in promotional guides
- profit from retail outlets
- lottery funds, casinos, other gambling revenues
- grants from foundations, fundraising events, and private and member donations

Exhibit 27: Provincial Craft Council Employment, Payroll and Revenue in 2002

	Full Time Equivalent Employment*	Number of Employees during year	Number of Full Time Employees	Payroll in 2002 ($000)	Council Revenue from All Sources ($000)
Canada	85	159	53	$2,343	$8,540
NL	10	24	6	$280	$481
NS	2	3	2	$73	$153
PEI	3	9	3	$136	$104
NB**					
QC	40	62	22	$792	$4,772
ON	13	23	10	$488	$1,900
MB	2	6	1	$38	$109
SK	7	13	3	$208	$563
AB	4	9	3	$181	$217
BC	4	10	3	$147	$111

*As of June 2003.

**Data from New Brunswick was not available at time of writing.

Source: *Economic Impact Survey of ProvincialCraft Councils in 2002*

Fewer than half the councils regularly receive both federal and provincial government funding. Most of the councils report stresses related to limited funding and approximately half are in a state of deteriorating funding.

2.5.2 Canadian Crafts Federation

The Canadian Crafts Federation / Fédération canadienne des métiers d'art (CCF / FCMA) is the national arts service organization that represents provincial craft councils and the craft sector throughout Canada. It advances and promotes the vitality and excellence of craft nationally and internationally for the benefit of craftspeople and the community at large.

Until recently, the Federation functioned exclusively as a volunteer organization with operations funded out of small cash contributions from provincial councils and donated services of provincial craft council employees. In March 2001 the Canada Council for the Arts, through a new National Arts Service Organizations program, initiated modest funding assistance to CCF / FCMA permitting the hiring of a part time administrative director.

The Federation is, in effect, the successor to the Canadian Crafts Council (CCC) which ceased operations in the mid 1990s when federal government funding was withdrawn. The CCC could be seen as a *national*, as opposed to *federal* craft organization, since it had only limited accountability to provincial craft councils.

The provincial councils agreed to band together in May 1998, and with funding and support from the Canada Council for the Arts and DFAIT (in support of the PEMD-TA Working Group in Craft) held preliminary planning meetings. The current structure of CCF/FCMA reflects the continued scarce funding resources.

The current organizational structure includes ten representatives, one appointed by each provincial craft organization. An executive of five is elected by the provincial representatives, including positions of President, Past President, Vice President, Secretary, and Treasurer. In addition, there is provision for five additional seats on the federation board. Consideration has been given to include representatives on the CCF/FCMA board from national groups representing the major craft disciplines such as clay, wood, metal, glass, and textiles.

CCF/FCMA has worked on the basis of national consensus, mutual discussion and collective decision making. Projects (such as this study) that are deemed to be of importance and relevance to all councils are delegated to selected councils for coordination and management. In this way the Federation has achieved a sharing of resources and workloads across the country, which in turn has enhanced communications in the craft organization network across the country.

2.5.3 Single Media Organizations and Guilds

Single media guilds have a most important role in serving craftspeople that is different from but complementary to that of provincial craft councils. The focus of the guilds is on the artistic and technical specifics of particular media fields, while councils serve the broad cross-media interests of all craftspeople in each province. The Glass Art Association of Canada (GAAC), for example, with members from across Canada, organized a major conference of professional craftspeople at Harbourfront Centre in May, 2003. Included were slide shows, artist demonstrations, a technical display, a show of 100 members' works, gallery tours, etc. Owing to the capital-intensive nature of glass forming, most of the 150 participants were full-time professionals. Many, but not all, were also members of provincial craft councils.

Major media fields such as clay and hand weaving have strong provincial guilds but are not organized nationally. Other fields like musical instruments and fine furniture appear to lack organizations in Canada. However, serious Canadian makers in such fields are likely to belong to American or international guilds.

Some of the key single media guilds operating in Canada include:

- Glass Art Association of Canada (GAAC)
- Metal Arts Guild (MAG)
- Canadian Bookbinders and Book Artists Guild (CBBAG)
- Fusion: The Ontario Clay and Glass Association

- Alberta Potters Association
- BC Potters Association
- Alberta Handweavers, Spinners and Dyers
- Ontario Handweavers and Spinners
- Southern Alberta Wood Workers Association
- Surfacing: Textile Artists and Designers

Most single media guilds in Canada operate on an entirely volunteer basis and have a mix of professional and amateur members. The expectations of the professionals, who generally act in leadership roles, are different from those of the amateurs. As a result, organizations face the dilemma of how to fulfill the expectations of both groups with very limited resources. An organizational model similar to Québec's Conseil des métiers d'art (CMAQ) composed entirely of professional craftpersons was considered the ideal for many. The reality in Canada today, however, is a model based on the interdependence of professionals and amateurs. Amateurs form the majority of most guilds' memberships and hence contribute the most revenue. Through their numbers, amateurs keep suppliers of craft materials in business, thereby indirectly benefiting the professionals. As well, amateurs lend their time and support to professionals who develop and direct most of the guild's programming.

Grant assistance, where available from provincial arts councils or governments, to key craft guilds for annual operating expenses and activities enable the organizations to interact with their memberships through better programming and projects. Typically, these organizations, like GAAC, publish magazines or newsletters, mount exhibitions, and conduct conferences, seminars and workshops.

Single media guilds are hard pressed to achieve their current goals, let alone to engage in further program development and expansion, without some level of professional administrative expertise and support. This administrative deficit is particularly noticeable when longer term planning is required for multi-year funding. The continuing preoccupation of key volunteer board members with ongoing administrative matters deflects their energies away from artistic planning and programming.

To ensure long term viability, most guilds agree that board development, strategic planning, continuous redefinition of goals, focusing energy on strengths, and development of specific joint ventures with other organizations, should be an essential part of their business plans. Acquiring advocacy skills and engaging in joint lobbying efforts on issues of importance are also goals for many guilds.

Most guilds agree that there are scarce opportunities and too few venues for exhibitions. Although in recent years there has been a gradual increase in exhibitions of craft in public art galleries, a majority of such galleries continue to exclude craft from their exhibition programs.

2.6 Education and Skill Training Programs

Centres of knowledge, research and learning are critical for the continuing development of most fields of human endeavor, in cultural activities, as well as other segments of the economy. A craft network for economic development also includes those who are primarily engaged in providing skills and training to the current and next generation of craft producers. These institutions provide a critical role in supporting innovation and knowledge in craft, and can serve as a focal point for clusters of craft activity.

Craft methods have historically been handed down from one generation to the next through formal and informal apprenticeships. There are long traditions of formal guild training and certification in Europe, some of which continue, particularly in Germany and in the Scandinavian countries. In Canada, all jurisdictions appear to have at least some craft programs delivered through colleges, arts schools, and universities. Though various studies have listed current programs, there is no regularly maintained or updated compilation or catalogue of education or skill development programs in the craft sector.

Most provincial craft councils, universities, and colleges have websites that provide this information, though it was not within the scope of the study to compile these into a single Canadian source for crafts-related education and skills programs. Nevertheless a preliminary list of institutions offering post-secondary training in disciplines related to craft production is provided in the Appendix D.

Career information for the craft disciplines has been included in a publication of the Cultural Human Resource Council entitled, *The Mind's Eye: Careers in Visual Arts and Crafts* published in 1998.[32]

2.6.1 Formal Education

Documentation of the availability of craft training through formal educational channels is limited. The general perception in the craft community, however, is that the number of courses relating to craft education has been in decline for twenty years, with interviewees from Ontario and Saskatchewan making special note of this trend in their provinces.

Historically, colleges of art did not include general training in business practice in their programs, despite the fact that many graduates will make their living as self-employed craftspeople. Some of those interviewed noted that this situation is changing as schools recognize that a closer connection needs to be made between the business aspects and the craftsmanship required to maintain a studio.

The Groupe de travail sur les métiers d'art (1999) reports that in the Québec college system, the Diplôme d'Études collégiales 573.01 in craft technique is a professional program that includes preparing students for the labour market and business practices.

[32] The contents of the booklet relevant to craft are also available on the Internet at http://www.culturalhrc.ca/careers/cicenglish/mindseye/infozine/craftcareer.htm.

The program is designed to lead to a professional craft practice and provides tools for creating self-employment situations.

In Québec, the Institut des métiers d'art - Cégep du Vieux-Montréal (Montréal) and the Centre de formation et de consultation en métiers d'art-Cégep de Limoilou (Québec City) are responsible for the implementation of the craft training plan adopted in 1984. Over ten school-workshops ("écoles-ateliers", see list in Appendix D) offer training in the craft techniques (ceramics, music instrument making, fine woodworking or cabinet making, textiles, glass, jewellery, leather) while general education and business management training are offered in the Cégeps. Other training courses in fashion, design, and industrial design are offered outside the Cégeps and schools-workshops network, by other colleges and university institutions.

The 1994 study, *Work in Progress, Human Resource Issues in the Visual Arts and Crafts* listed "four schools in Canada dedicated specifically to the visual arts and crafts:[33]

- Nova Scotia College of Art and Design in Halifax
- Ontario College of Art and Design in Toronto
- Alberta College of Art and Design in Calgary
- Emily Carr Institute, in Vancouver, British Columbia

Other schools offering significant educational support for craft include:

- Canadore College, North Bay, Ontario
- College of the North Atlantic, Stephenville and St. John's
- Concordia University in Montréal
- George Brown College of Applied Arts and Technology, Toronto
- Georgian College, Barrie, Ontario
- Haliburton School of the Arts, Sir Sanford Fleming College, Haliburton, Ontario
- Sheridan College Craft and Design Program, Oakville, Ontario,
- Kootenay School of the Arts Cooperative, Nelson, British Columbia

In the consultation for this study, the Saskatchewan Craft Council noted a particular concern about the declining support for arts and craft education in the province. Craft – related post-secondary programs have now been cut so that only clay programs at the University of Regina and the Saskatchewan Institutute of Applied Science and Technology (SIAST) Woodland Campus remain. The council believes that craft educational options in the province are essential to sustain and promote the craft community.

[33] This study, prepared by Price Waterhouse for the Working Group for Human Resources in the Visual Arts and Crafts, was one of a series of studies that led to the creation of the Cultural Human Resources Council.

2.6.2 Continuing Education

Our interviews with craft sector representatives indicated that all provincial councils see continuing education as an important part of their mandates. Most councils offer awards and/or scholarships and some offer workshops in technique and skill development, and in business and marketing, but the delivery of more structured training tends to be the role of schools and guilds.

Though most of these programs are relatively informal and delivered outside the Canadian education system, they provide a range of skills and business training aimed at increased quality and business development. Examples of seminars include sessions as master classes in craft techniques, on photographing craft pieces, understanding small business taxation, and developing markets for craft products.

Organizations such as Harbourfront Centre, and the Banff Centre also offer activities supporting craft development. In Québec, the provincial government supports training activities for craft professionals, with expenditures of about $200,000 in 2002.

"At the Red Deer College (Alberta) "Series" program – Canada's largest summer school for visual arts – about half the courses are in craft media."[34] The Series attract an interesting combination of students, both amateurs and professionals, from beginners to highly experienced, in a comfortable mix. Many of the instructors note that teaching is an important professional development activity for them because contact with students generates creative and business opportunities.

The federal government through Human Resources Development Canada, sponsors the Youth Internship Program (YIP) that provides wage assistance for young people gaining work experience in their fields of interest and study. The CMAQ in Québec has been particularly active in this area.

While some provincial craft councils and single media organizations have adopted a mandate to promote skill development and offer courses and workshops, there appears to be no national catalogue or inventory of these efforts. As a result, much of the training and skill development remains informal, uncertified, and largely unrecognized except as the skill is embodied in the products produced by craftspeople.

2.7 Market Segments in Craft

Though craft practice is often categorized by media or disciplines -- such as clay, glass, and paper -- markets are often organized by theme or products that cater more to the interests of buyers. Identifiable market themes include:

- Art of the table / marché des arts de la table
- Gift / marché du cadeau
- Furniture and offices items / meuble et articles de bureau

[34] Grace Butland (2002), p. 5.

- Clothing, fashion, and accessories / marché du vêtement, de la mode et des accessoires de mode
- Art and experimental objects / marché des œuvres de recherche et d'expression artistique
- Architectural enhancement / marché du bâtiment,
- Book and paper / marché du livre et du papier
- Set design and creation for the performing arts / marché des métiers d'art reliés aux arts de la scène (ex. costumier, décorateur, perruquier, etc.)
- Interior design / marché de la décoration d'intérieur
- Religious clothing and objects / marché des vêtements et des objets liturgiques
- Musical instruments making / marché de la facture d'instruments de musique

These themes are sometimes categorized by names or market segments such as:

- art-to-wear
- sculpture-to-wear
- art-furniture
- ceramics
- jewellery
- among many others.

These themes also echo market segmentation delineated according to media or material used, which have been used to promote and market world-class excellence. As can be seen in the high-end craft from other industrialized countries, and in the functional art market, the highest prices or greatest value-added, as well as most renowned works are found in these specialized markets.

There are also special "life-style" markets such as western / cowboy culture that crosses over working and lifestyle craft such as saddles and other horse gear, furniture, architectural accessories, bird / decoy carving, boat building, and knife making where Canadians have a market for both their work and their presence as instructors and speakers.

Craftpersons and craft organizations can develop markets for craft through a variety of channels and market development techniques. Because of the relatively small size of most craft studios, however, there is a clear advantage to pooling marketing resources and fashioning a coordinated effort for both domestic and international markets for Canadian craft.

2.8 Summary of the Profile of the Craft Sector

2.8.1 Summing Up: The Economic Measure of the Craft Sector

Developing an estimate of the total value of craft sector economic activity requires making assumptions about the total craft production universe. From the survey of the craft producers, we have adopted a working assumption that craft councils represent approximately 40 percent of the producing craft studios in their province as members, unless we have recent reports indicating otherwise as in the case of Prince Edward Island and Newfoundland.[35]

Exhibits 28 and 29 present estimates of total craft employment and economic activity based on the survey results and best available estimates of the true number of craft studios in each province.

Exhibit 28: Estimated Employment in Craft Studios in 2001

Area	Estimated # of Studios	Employment (including Studio Owners)		
		Full Time/Year	Part Time/Year	Total
Canada	14,048	11,968	10,629	22,597
NL	1,000	832	743	1,575
NS	708	687	407	1,095
PE	540	357	529	886
NB	669	497	635	1,132
QC	2,021	2,343	643	2,986
ON	5,410	4,672	4,049	8,721
MB	395	345	281	626
SK	833	680	699	1,379
AB	1,273	693	1,461	2,154
BC	1,200	862	1,182	2,044

Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

We estimate that there are 14,048 craft studios operating in Canada, employing 22,597 people, including 11,968 full time craft professionals, and 10,629 part time craft professionals.

The estimate of $727 million in final sales of craft objects identifies craft as a major cultural industry in Canada. In considering this estimate please note the following:

[35] See Morley Pinsent and Gerry Gabriel, *A Business of Individuals: The Economic Value and Production Based Implications of the Prince Edward Island Quality Handcraft Industry*, for the Prince Edward Island Crafts Council, March 2001 and the Craft Council of Newfoundland and Labrador, *Craft Industry Development Strategy: A Summary*, April 2002.

- These are conservative estimates. If anything, the annual economic value of craft activity in Canada is higher.
- The estimate does not include most larger producers. To the extent that large producers are members of provincial craft councils and responded to the survey, these results are included and scaled accordingly.
- The estimates do not include revenues generated by producers of craft shows through rental of sales booths and exhibition space.

Exhibit 29: Estimated Craft Sector Revenues in 2001

Area	# of Studios	Estimated Value in 2001(in millions)		
		Producer Revenues	Distributor Markup	Total Value Added
Canada	**14,048**	**$545.4**	**$181.6**	**$727.0**
NL[36]	1,000	$18.4	$6.1	$24.6
NS	708	$23.9	$8.0	$31.9
PE[36]	540	$11.4	$3.8	$15.2
NB	669	$18.0	$6.0	$24.0
QC	2,021	$154.7	$51.5	$206.3
ON	5,410	$218.4	$72.7	$291.2
MB	395	$13.5	$4.5	$18.0
SK	833	$19.6	$6.5	$26.2
AB	1,273	$25.3	$8.4	$33.7
BC	1,200	$42.0	$14.0	$56.0

Source: *Economic Impact Survey of Canadian Craft Producers in 2001*

2.8.2 Observations on the Profile of Craft Producers

- The majority (73 percent) of craft producing members of the provincial craft councils operate as individual craftpersons; 10 percent have formed partnerships with others; and the remaining 17 percent have employees, ranging from a single part-time employee to over 30 employees.

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[36] Note that these figures are based on multiplying average revenues reported by respondents to the survey by the estimated number of studios in the province. In the case of Newfoundland, the 2001 Survey estimated that craft producers generated $38 million in the year 2000, roughly double the $18.4 million figure indicated here. We surmise that the more intensive survey process used in the provincial study resulted in higher response rates, generating a more precise revenue estimate than that provided by the national survey done for this study. Similarly, the Prince Edward Island survey conducted with reference to the year 1999. That study estimated that 540 producers combined to generate a wholesale value of $9.9 million, and this was doubled to arrive at a total retail value of $19.8 million.

- Average gross craft revenues for studios of full time professionals averaged roughly $60,000 in 2001, and median revenues of $30,000. Ten percent of these respondents had craft revenues in excess of $120,000.
- Among the full time craft professionals that provided the necessary data, net craft income (or earnings) averaged $17,300 in 2001, or less than $10 per hour. The median net income in this sample was $12,000, while the top ten percent earned net income of $49,000 or more.
- One in four craft producers generate at least some revenue directly from foreign markets, with or without the support of existing export programs. Others may sell to foreign markets indirectly through sales to tourists.
- There are some successful large craft or craft-related studios and enterprises that are not directly linked with or served by PCCs
- The survey conducted for this study resulted in an estimate of $727 million in economic activity. This represents an important first comprehensive effort to measure the economic contribution of craftpersons, craft organizations, and distribution agents in Canada.

2.8.3 Observations on Organizations in the Craft Sector

- The ten provincial craft councils (PCCs) provide the major organizational and developmental pivot for the sector, though they vary considerably in size, funding and resources. With very limited resources, most PCCs engage in important support activities for craftpersons and the craft sector including advocacy, promotion of artist rights, training information and activities, marketing opportunities including retail shops and shows, and export development advice and opportunities. All PCCs are engaged in provincial craft development strategies to some extent.
- The Canadian Crafts Federation/Fédération canadienne des métiers d'art (CCF/FCMA) is growing into its role of promoting and advocating for craft at the federal level, and coordinating national and international craft development efforts. It remains under funded relative to the cultural and economic development role it can play for the craft community and the general public in Canada.
- Single craft-media organizations and guilds provide their members with opportunities for national and international exposure and high level training in the practice of their craft.

2.8.4 Observations on Craft Market Development

- All PCCs are engaged in market activities including exhibitions, shows, boutiques, galleries
- Many PCCs are engaged in domestic market development activities either directly or by supporting their members

- Key private-sector players are active in the wholesale and retail distribution of craft products ranging from retail boutiques offering craft, to retail craft shows, to craft-specific sections in regular gift shows. Some also offer access to retail and wholesale craft shows and galleries in the US.
- There are relatively few intermediaries in the field, and many craft producers sell directly to final consumers.

2.8.5 Observations on Craft Export Activity

- A number of craftpersons enjoy international reputations and sell products in the international craft market. Survey data indicates that an average 16 percent of craft revenue is generated from exports, and some producers generate nearly all their revenues from export sales. This is a surprisingly strong export performance given the dominance of micro-enterprises in the craft sector.
- The United States dominates as the largest export market for craft made in Canada, both in perception and reality.
- Almost all PCCs have engaged in export promotion activity, though some see greater promise in developing export markets by selling to foreign tourists than direct retail opportunities in foreign countries.
- Markets and export opportunities can be classified according to products, media, or functional themes.
- Québec, through the efforts of the CMAQ, has demonstrated that strategies based on supporting the studios, developing market niches, such as common themes or media rather than geography, and on quality rather that on volume or low cost, offer better outcomes.
- A development strategy needs to be phased in over time, building on the success of priority actions and initiatives.

3. Toward a Development Strategy for Craft

3.1 Introduction

3.1.1 Background – The Need for a Strategy

The craft sector in Canada stands at a crossroads of opportunity. Overall, economic and cultural trends are turning in favour of increasing interest in craft objects. Interest in purchasing craft is generally thought to be strongest among the more educated and those with above average incomes. Though trends in sales of craft will rise and fall from year to year, the longer term general and cultural interest in craft should continue to grow for the foreseeable future.

Canadian craftpersons have an opportunity both to encourage and to share in a growing interest in craft objects, both in Canada and in other developed countries. The reality is that markets and audiences for the finest craft objects are currently much stronger in the United States than in Canada. The reasons for this are diverse, including the fact that disposable incomes in the US are higher on average than in Canada, and there is a larger population with the inclination and the means to buy craft objects in the US, and the availability of craft education in universities across America fosters an educated clientele.

In Canada, there are several social and cultural barriers which, although commonly known, have not become apparent through the surveys for this study. Nevertheless, these need to be identified as issues or barriers to the growth of craft in Canada and, as such, will also be issues for strategic action. Consultations indicated that these barriers have to do with a variety of conventions, perceptions, and lack of education on craft which negatively or inappropriately position craft, particularly in relation to the visual arts.

This section does not pretend to present a comprehensive craft sector development strategy. It is rather a synthesis of the consultations, as detailed in the methodology description in the next section. Also, due to the limitations of the resources, two very important components relevant to the craft sector development, namely education and artistic development have not been covered specifically in the research, except by mentions from participants at roundtables or in interviews. This first proposal of a development strategy for the craft sector should lead to a more comprehensive one in the future.

The preceding profile focuses on measures and descriptions of economic and market development. The ideas and strategy presented in this section are intended as a springboard from which discussions, exchanges and hopefully collaborative actions can evolve. A cohesive sector-wide development strategy, concerned with domestic and international aspects of development, is needed to:

- identify the most important and effective actions to be undertaken

- identify potential players and their roles
- to use resources effectively, including those generated through craft organizations as well as those from other partners such as government ministries and agencies with mandates to support the cultural industries.
- Identify goals, measures of outcomes and evaluation methodologies.

An improved knowledge of the sector as well as an industry-wide development plan is required for the sector to grow, both in quantity – as measured in sales volume and numbers of professional craftpersons engaged -- and in quality – as measured by the domestic and international reputation of Canadian craft and in the value and prices of the objects created.

Following the discussion of the major issues, this strategy moves to identify those which seem to be both of high priority and within the realm of control of CCF/FCMA, the provincial craft councils, and interested other players within the Canadian craft community.

3.1.2 Methodology

This strategy gathers information and viewpoints from a variety of sources. It draws on material from the foregoing profile. It draws on the views from a series of interviews and discussions with craft organization executives, large craft producers, show organizers and gallery owners (summaries of these interviews can be found in the Appendix E). It also draws on ideas discussed at four roundtables held over a two-week period. Roundtables were held in Calgary, Halifax, Toronto, and Montréal, with representation from provincial craft councils as well as craft producers. Each roundtable opened with a presentation of preliminary results from the *Economic Impact Survey of Canadian Craft Producers*, followed by participant discussions on issues facing the craft sector and what initiatives might be undertaken collectively to improve access to the general public as well as specific markets for Canadian craft.

The notes and observations from these roundtables were consolidated into a set of brief issue descriptions and three tables of opportunities, one each for domestic market development, international market development, and opportunities for increasing organizational resources and ensuring their effective use. Material from the craft sector interviews was incorporated at this point, recognizing that there was overlap of issues raised, and a few new issues added to the mix.

These issue and opportunity tables were then sent back to representatives of provincial craft councils to gather views on the importance of the various issues, whether initiatives had been tried, the perceived value of the initiative, and a rating of degree of priority placed on the various issues or opportunities. In effect, this process represented a modified "Delphi" technique which allows for an initial sharing of ideas, and a second round of views based on a review of all ideas presented in the first round discussions.

The results of the priority and opportunity rating process are provided in the tables in Appendix F. The tables highlight the highest priorities and most promising opportunities as evaluated by representatives of provincial craft councils. These elements are reflected in the discussion of key issues and actions found below, and have been reviewed by the steering committee.

Note that many of the items mentioned in the interviews and at the roundtables are either have been tried or in progress: about one quarter are current projects of at least one provincial craft council, and another quarter have been tested or tried by a council, at some time. Following are a few examples of current craft council activities that address issues or ideas from roundtable meetings and interviews:

- The four provincial craft councils in the Atlantic region co-operate on an international wholesale show that might be replicated in the West.
- Saskatchewan has the most thoroughly organized annual competition and awards event, which could be expanded provincially or regionally.
- Québec has the most sophisticated export activity and should lead any export expansion.
- Newfoundland and Labrador has experience with a loan fund.
- Several councils have good magazines that might be expanded into an annual publication.
- Alberta has a registered trademark Symbol of Quality and a Craft Business Training Program. Both could be expanded into national programs.
- Every council has at least one strong area of activity.

Replicating, expanding or "franchising" some of these activities across the country is probably an obvious place to start a list of possible actions. Expansion of current and successful provincial activities may be our best opportunity for development. Some of the more ambitious plans are already successful somewhere in the country.

The methodology underlying the strategy portion of this report allowed for consultation and a first effort at identifying priorities. In a way, this section is a synthesis of the consultation process, and is not a final ranking of priorities or a complete development strategy. On some items different points of views could exist, and a final development strategy will require further discussion.

Opportunities to discuss the synthesis presented here will be provided to ensure that the craft sector can move forward and implement a broadly supported action plan in the near future. These elements of a development strategy are proposed as a starting point for discussion among key craft sector players invited to gather at the annual general meeting of CCF/FCMA held in conjunction with the Bronfman Award presentation in early October 2003. We anticipate that this meeting will assist in developing the concerted strategy needed for the development of the sector.

3.1.3 Guiding Principles and Key Issues for a Craft Development Strategy

There are two simple guiding principles or themes evident in the following strategy discussion. The first guiding principle is that **support for professional craftpersons and studios builds the foundation of the craft sector**. Their efforts and activities are essential to the success of craft in Canada and they must be supported. The first of the following issues directly addresses this point.

The second principle is that **concerted actions among all players in the sector** should be supported, financially and otherwise, to ensure the best use of the existing expertise, experience, and available resources. More cohesive action will also help us to secure additional resources that can be devoted to relevant and coordinated action. Acting in concert on a consensus action plan should include collective projects and responsibilities on collective actions. Three of the following issues directly address this principle.

The remaining issues presented in the strategy also reflect these principles, though somewhat less directly, through discussion of the elements of a **domestic development strategy,** followed by elements of an **international development strategy**. Both domestic and international are organised around two main issues: the *need for different strategies for different markets and audiences, products, and media (niche markets),* and the *need to develop public and support specialised expertise and writing*. Details or issues and opportunities and the priorisation process are presented in Appendix F. Other items in this appendix are not yet developed and will need to be discussed, detailed, and initiated. A concluding exhibit presents the summary of the issues, opportunities and actions.

3.2 Improved Support for Professional Craftpersons and their Studios

Professional craftpersons are the foundation of the craft sector. Priorities include the provision of resources to promote and support product design and production, and to achieve an improved access to capital and to markets.

Many of the following issues and actions require an expanded and enhanced craft organizational capacity. Given the nature of craft production, it is most unlikely that private sector players would step forward to undertake investments in developing markets and audiences and capture the resulting benefits to guarantee an adequate return. Desired outcomes are more likely to be achieved through the collective activity of craft organizations.

Issue

Many craftpersons and organizational representatives have noted that particular studios, as well as the craft sector in general, are limited by a scarcity of skilled personnel to meet current demand or any additional demand that might be generated through market development.

Relevance

Craftpersons and their studios are the core of the craft sector in Canada. They bring together knowledge, design, creativity, and skill to produce the objects that drive the craft sector. Opportunities exist for expanded markets both domestically and internationally, however many craft businesses are unable to take advantage of these due to constraints in capacity, skilled labour, equipment, financing, and access to information.

Actions

- Lobby concerned government agencies for programs or improved access to programs for studio development or growth (small and medium enterprises).
- Create a program for capital support for studio development, similar to that provided by SODEC in Québec.
- Create export market development committee arm through the Canadian Craft Federation, to collect information, develop how-to guides, and provide financial and logistical support to individual studios participating in international shows and trade missions.
- Create an agency to promote the works of craftpersons whose work is judged to be of sufficient quality and interest to warrant exposure on the world market.
- Promote partnerships to share production capacity across studios to better respond to surging or declining demand.
- Create and provide centralized database on information on business development programs available to craft studios.
- Regarding specific training needs :
    - Keep training current, with advanced workshops that allow practising carftpersons to maintain and enhance skills
    - Implement apprenticeship training opportunities
    - Include entrepreneurship training in all craft training programs.

3.3 Organizational Capacity

Many of the comments gathered in the discussions and interviews focussed on issues of organizational capacity in the craft sector, including the need to increase organizational resources and to use available resources more effectively. As noted in the methodology section, representatives of provincial craft councils were asked to rank these issues and ideas on a scale of 1 (low) to 5 (high) on the degree to which the issues were important and relevant to a national strategy for craft, and the degree to which the proposed solutions were practical and of strategic importance for CCF/FCMA.

The priority issues here have been selected from Appendix F - Exhibit F1 – Priority issues in Canadian Craft that were rated 4 and higher on average on the importance of barrier, and 4 and higher as a priority issue for CCF/FCMA. We also include issues from Exhibit G4 - Opportunities for Increasing Organizational Resources and their efficient use that were rated 3 and higher, on average, for potential to be rolled out at the national level, and a high priority rating on short and long term priorities for CCF/FCMA.

3.3.1 Need for a Sector-Wide Strategy: Expand Participation in a Craft Strategy, Develop a Concerted Action Plan

Issue

The craft sector includes a number of key players who have no formal connection to one another despite opportunities to pool resources and work together for more effective results.

Relevance

Craft is increasingly recognized as both cultural and commercial activity. There is no organization in Canada that formally supports information exchange and joint activities between craft organizations and partners in distribution -- single-media guilds, directors of public galleries and museums, owners of private galleries, and domestic and international show organizers.

CCF/FCMA and the provincial craft councils already play a central role in developing action plans for the economic development of craft generally, and domestic and international craft markets in particular. Current examples of such planning activities include:

- CCF/FCMA three-year plan
- Corresponding elements in PCC strategic plans
- Trade Team Canada - Cultural Goods and Services (TTC-CGS) action plan[37]

Actions

- Include media guilds in the development of a national craft strategy
- Consult with private distribution players (boutiques, galleries, wholesale shows, retails shows) in the development of a national craft strategy

3.3.2 Examine the Role and Mandate and Organizational Structure of CCF/FCMA

Issue

Recent developments in craft and a growing interest in and support for coordination of national initiatives for craft suggest that regular review of the role and priorities of CCF/FCMA should be undertaken.

As confidence and comfort with CCF/FCMA grows, there has been considerable discussion of the ability of the organization to secure the resources required to effectively execute its mandate and priorities, and to engage other players in the craft sector in partnership initiatives. The role and mandate and organisational structure of

[37] "Trade Team Canada - Cultural Goods and Services (TTC-CGS) is the cultural sector's vehicle for working with the Department of Canadian Heritage and the rest of the Government of Canada on export preparedness and international business development issues." Quoted from the Department of Canadian Heritage website: http://www.pch.gc.ca/progs/ac-ca/progs/rc-tr/progs/eccc-ttcc/index_e.cfm

CCF/FCMA should be determined in the context of its interactions with all partners and players in the sector.

Relevance

This development strategy also must be clear on the role of CCF/FCMA. Should the organization co-ordinate this effort with the involvement of provincial councils, and in co-operation with media associations, gallery owners, and show organizers? Is some other national entity required to take the lead in this effort? Several items in this strategy suggest that the mission and priorities of CCF/FCMA might be expanded or extended to undertake an expanded role in developing the craft sector in Canada; some consider that CCF/FCMA should play a greater role in organising the sector and determining economic strategies. Others consider that the central role of CCF/FCMA should be limited to representation and political lobbying (national and international), and consultation with the players and partners.

The expanding opportunities, vision, and strategy apparent in the craft sector suggests that the sector should re-examine whether the composition of CCF/FCMA and the resources available to it are sufficient to meet these growing expectations.

In particular, the following might be addressed:

- What role CCF/FCMA should play as a support and co-ordinator versus the role of a direct agent?
- Should CCF/FCMA maintain a liaison, advocacy, and information collection and dissemination role with the federal government, its departments and agencies, as relevant to the Canadian craft sector?
- Should CCF/FCMA work as a catalyst to enable provincial craft councils with similar initiatives and goals to work together on joint projects?
- Should CCF/FCMA consider initiatives currently or previously undertaken by provincial craft councils to encourage or implement similar initiatives, as appropriate, in other regions or on a national scale?
- Should CCF/FCMA role be to support the development of professionalism in craft?
- Should CCF/FCMA play a leading role in the national and international promotion and marketing of Canadian craft and craft makers?

Actions

- Pursue the discussions and exchanges on the role, mandate and organizational structure of CCF/FCMA, in relation with PCCs and other key players
- CCF/FCMA should seek the endorsement of its members for supporting principles for future activity and its action plan

- Determine if the present organization structure of CCF/FCMA as a federation of provincial councils provides the capacity to address the actions identified in this strategy proposal

3.3.3 Government Recognition of Craft: Core Funding for Craft Organizations

Issue

The craft sector needs sustained financial support for federal and provincial craft organizations that play a crucial role in organizing, mobilizing, and sustaining collective cultural and economic efforts of professional craftpersons.

Relevance

Many craft organizations operate on shoestring budgets, drawn from revenues from membership dues, craft shops, galleries, and shows. Very few craft organizations receive operating grants from government sources. In most cases government support is limited to the occasional project grant. While in most cases revenue is sufficient to keep the doors open, more is required to realize the full potential of the craft sector.

The professional craft sector is eager and willing to expand market development and promotion activities but these efforts are delayed and hampered by limited resources.

A co-ordinated effort to lobby relevant government agencies for consistent core funding for craft organizations is required.

Actions

- Approach provincial governments and cultural organizations with information from the profile to ensure that they understand the extent of current craft activity, the potential for future growth, and the impact that support funding can have on employment and incomes within their province.
- Pursue research on the craft sector; future research should aim to expand our knowledge of the whole sector -- its activities, economic value, challenges, and potential: expand knowledge of the distribution network, including boutiques and galleries, enhance understanding of excellence in various themes, media or niches markets and audiences, improve knowledge of specialised themes, media or niches markets and audiences to develop specific strategies.
- CCF/FCMA should continue to apply for expanded core organizational funding sufficient for planning and project co-ordination across the craft sector, and to support provincial craft councils with funding and support for their time and effort required for participation in these efforts.

3.4 Domestic Market Development

The domestic market development portion of the consultation resulted in relatively few responses as well as low ratings for the opportunities suggested in comparison to the responses on international market development.

Those issues, opportunities or actions that received five or more “yes” responses for the “potential to be rolled out at the national level”, and average ratings of at least 3 for both short and long term priority for action by CCF/FCMA are discussed below.

3.4.1 Need for different strategies for different markets, audiences, products, and media (Niche Marketing)

Issue

Objects created by craftpersons are so diverse in use and varied in design and target market that marketing “craft” per se risks missing more specific audiences for specific types of craft objects such as musical instruments, fine contemporary craft, art-to-wear, and other themes, niche markets, and audiences.

Relevance

When sold from locations other than studios, Canadian craft tends to be sold in general craft and gift shows and outlets. This distribution format caters to the browsing public, but not necessarily to the specialized niche markets and audiences that would allow a better match between particular groups of consumers and the specific type of craft products they are seeking.

Actions

- Work with various industry associations or groups to create opportunities for interested craftpersons to display works to targeted markets and audiences or audiences at their conventions, festivals, or annual meetings
- Organize Canadian or provincial touring exhibitions showcasing the finest juried craft
- Prepare a guide to galleries and shows in Canada similar to the recently published “Marketing Guide for Contemporary Fine Craft in the United States”

3.4.2 Develop Public Knowledge and Support Specialized Expertise and Writing

Issue

Promoting improved understanding of craft is a complex issue, including the knowledge of craft among the general public, as well as among more specialised audiences. For the general public there is a need for both accessible writing and the use of other media to inform the general public about the objects and production techniques of craft. For more advanced audiences there is a need for more sophisticated “curatorial” writing disseminated through arts magazines, catalogues, and special publications.

Relevance

Public understanding of craft is an important part of market development since low levels of appreciation for the quality of the work, and the time, effort and skill of the craftperson reduce the ability to charge prices that result in adequate incomes for craft professionals. Craft organizations need to work harder at capturing the public eye through major exhibitions and shows, articles in media targeted at key audiences.

Actions

- Support curatorial practices for crafts, including curatorial incubators, curatorial training, and curatorial residencies
- Support the implementation of craftpersons' run centres, and other such supporting structures and organizations
- Extend the nascent Ontario Crafts Council "Public Galleries Craft Alliance" with public galleries and museums on organizing exhibits of fine craft and sharing curatorial and catalogue development to include galleries across Canada
- Designate national and regional marketing and media relations representatives for craft to ensure that interested magazine writers and television journalists have access to the information and support required to create stories on craft and craft producers
- Explore the feasibility of a quality trademark for craft made in Canada (e.g.: "CRAFT Made in Canada")

3.5 International Market Development

The international part of the strategy received more responses than the domestic, perhaps reflecting a stronger consensus on the importance of a collective effort on international market development. This interest is also reflected in the many ideas for action suggested under a number of opportunities.

Issues, opportunities and actions that were endorsed by 5 or more in their potential to be rolled out at the national level, and at least 3 on both their priority rating action by CCF/FCMA in the short and the long term are discussed below.

3.5.1 Need for different strategies for different markets, audiences, products, and media (Niche Marketing)

Issue

High end markets and audiences for craft are currently almost entirely international. As in most arts and cultural pursuits, domestic acceptance often depends on international recognition or celebrity. For both these reasons, craftpersons need greater exposure in international markets and audiences.

Relevance

The risks and costs of these ventures, however, are often too much for most craft studios to bear. The risks can be reduced by the production of good market intelligence, the creation of international networks involving key shows and distributors through visits and ongoing communication. It is extremely important for opening doors for Canadian craftpersons. Québec, through the efforts of the CMAQ, has demonstrated that strategies supporting craftpersons and studio initiatives, and based on developing market niches, such as common market niches or media rather than geography, and on quality rather that on low cost, offer better outcomes.

Actions related to Organization, Research, and Export Preparedness

- Maintain and increase participation in government consultative structures, participate in upcoming activities and events, and disseminate information about these initiatives.
- Commission research on international markets and audiences for specific themes, media or products, identifying the most important international specific markets and audiences. Care should be taken to identify markets and audiences for both one-of-a-kind and production work.
- Create an agency to promote the works of rising craftpersons whose work is judged to be of sufficient quality and interest to warrant exposure on the world market.
- Produce a European market companion document to the recently published Marketing Guide for Contemporary Fine Craft in the United States. This could cover UK (London), Ireland (Dublin), France (Paris), Netherlands (Amsterdam), Germany (Berlin), and Italy. Identify and prioritize trade shows (art, design, craft), fairs, commercial galleries, other retail opportunities. Consider market access, recognition (print promo requirements), timing and competitive issues -- such as works priced for American versus European markets -- major challenges, and major opportunities.

Actions Related to Participation in International Shows

- Expand and co-ordinate participation in international shows.
- Work with various industry associations or groups to create opportunities for interested craftsperson's to display works to targeted markets and audiences.
- Follow-up on the trade mission to the Glass Art Society Conference in Amsterdam in 2002.
- Investigate potential in Canadian embassies in the United States and Europe, possibly with the services of the cultural trade agents to launch exhibitions, and facilitate connections with commercial and public galleries and museums, either for collective or provincial projects.
- Examine in connection with other relevant craft organizations and other key players in Canada, the possibility of a national/international wholesale show for craft.

Action Related to Creation of International Touring Shows Showcasing the Best of Canadian Craft

- Work with the Canadian Museum of Civilization to develop exhibition and forum. Exhibition would launch at the CMC, travel to US (New York, Washington, or Chicago - tie into SOFA) and Europe (London, Dublin, Paris, or Berlin). Tie-in with cross-sector events in the United States and Europe and an overall Canadian cultural goods and services promotional strategy, which would lead to ongoing export to these markets and audiences.

Action Related to Increased Coherence and Spending on Craft by Various Government Support Programs across Departments and Agencies.

- Lobby for new programs, increased budget, or improved access for projects supporting craftpersons and their studios.

3.5.2 Develop Public Knowledge and Expertise/Support Specialised Writing

Issue

As discussed in the domestic side of this issue, promoting improved understanding of craft is a complex issue, including the knowledge of craft among the general public, as well as among more specialised audiences.

At this international level, the more specialised audience, including savvy collectors of craft, and the most important institutions and museums, are the major targets.

Relevance

Public understanding of craft is an important part of market development since low levels of appreciation for the quality of the work, and the time, effort and skill of the craftperson reduces the ability to charge prices that result in adequate incomes for craft professionals. Craft organizations need to work harder at capturing the public eye through major exhibitions and shows, articles in media targeted at key audiences.

At the international level, both the building of reputations of individual artists, as well as general promotion and understanding of "Craft from Canada" should be pursued.

Actions

- Support curatorial practices for crafts, including curatorial incubators, curatorial training, and curatorial residencies.
- Insure sufficient visual, critical and promotional material/documentation for promotion before, during and as follow-up after any activity.
- Explore the means of a quality designation of craft for Canada branding.

3.6 Summary of the Development Strategy

The proposed strategy for the craft sector outlined here rests on information and data collected through more than a year of effort. It is a synthesis of an ongoing consultative process and development of priorities. The research effort focused on producers of craft and the provincial organizations that support them, but there was also an important effort to secure the views of those more exclusively engaged in the distribution and marketing of craft in galleries, boutiques, and craft shows. More needs to be done to bring the various players in the craft sector together – to promote research, share ideas, combine effort and resources, and to work co-operatively to promote improved understanding of craft in Canada, and to develop markets and audiences for Canadian craft around the world.

The elements of the strategy put forward here are meant to start the discussion among the wider craft community. Broadening the discussion will widen the understanding of the elements of the strategy, assist in developing priorities, and increase the chance of success by facilitating co-ordinated efforts across provincial boundaries and departmental areas of responsibility, and in all facets of craft production, marketing and distribution. This strategy is intended as a springboard for a cohesive "sector-wide development plan", including a "trade development plan" and a "documented export promotion strategy."

The research and consultation for this project has revealed some important commonalties shared by various players in the craft sector. Producers, distributors, and craft organization representatives have a remarkably common view of the key issues that face craft in the twenty-first century, and share similar visions of the challenges and opportunities ahead. In particular, we note the following common elements:

- Need for expanded support for craft producers to promote excellence in craft design and execution, and for marketing and distribution
- Strong support for collective action and organization of effort
- Importance of raising awareness and appreciation for Canadian craft, domestically and internationally
- Strong recognition of the importance of international market development for Canadian craft

Exhibit 30 presents proposed responses to these common themes in a summary form.

The craft sector in Canada has been building capacity and organizational strength by pooling efforts and pulling together. Through CCF/FCMA, provincial councils have been able to strengthen the understanding of craft within provincial and federal governments, and are beginning to convey a sense of the potential of craft as both cultural expression and a viable means to earn a living. Continued collective efforts must continue to strive for continued investment in craft producers, craft organizations, and in domestic and international market development.

Exhibit 30: Table of Issues, Opportunities and Actions

Issue	**Opportunities**	**Actions, activities, tools**
1. Support for Craftpersons and their Studios		
Need for support in market and skill development	Enhance program support for professional craftpersons as the core of the craft sector	- Lobby concerned government agencies for programs or improved access to programs for studio development or growth (small and medium enterprises). - Create a program for capital support for studio development, similar to that provided by SODEC in Québec. - Create export market development committee arm through the Canadian Craft Federation, to collect information, develop how-to guides, and provide financial and logistical support to individual studios to participate in international shows and trade missions. - Create an agency to promote the works of craftpersons whose work is judged to be of sufficient quality and interest to warrant exposure on the world market. - Promote partnerships to share production capacity across studios to better respond to surging or declining demand.
	Enhance training and business development support	- Create and provide centralized database on information on business development programs available to craft studios. Regarding specific training needs : - Keep training current, with advanced workshops that allow practising carftpersons to maintain and enhance skills - Implement apprenticeship training opportunities - Include entrepreneurship training in all craft training programs.

Issue	Opportunities	Actions, activities, tools
2. Organizational Capacity		
Need for a sector-wide strategy	Expand participation in a development strategy Develop a concerted action plan	Build on work of CCF/FCMA and professional provincial craft organizations as developers of action plans for the economic development of craft in domestic and international markets by: - Including media guilds in the development of a national craft strategy - Consulting with private distribution players (boutiques, galleries, wholesale shows, retails shows) in the development of a national craft strategy
Examine the role, mandate, and organizational structure of CCF/FCMA	Enhance the capacity of the craft sector for action	- Pursue the discussions and exchanges on the role, mandate and organizational structure of CCF/FCMA, in relation with PCC and other key players in the sector. - CCF/FCMA should seek the endorsement of its members for principles for future activity and its action plan. - Determine if the present organization structure of CCF/FCMA as a federation of provincial councils provides the capacity to address the actions identified in this strategy proposal
Government recognition of craft, core funding of craft organizations	Lobby relevant government agencies for consistent core government funding for craft organizations.	- Provincial governments and cultural organizations should be approached with information from the profile to ensure that they understand the extent of current craft activity, the potential for future growth, and the impact that support funding can have on employment and incomes within their province. - Pursue research on the craft sector; future research should aim to expand our knowledge of the whole sector -- its activities, economic value, challenges, and potential: expand knowledge of the distribution network, including boutiques and galleries, enhance understanding of excellence in themes, media or niches markets and audiences to develop specific strategies. - CCF/FCMA should continue to apply for expanded core organizational funding sufficient for planning and project co-ordination across the craft sector, and to support provincial craft councils with funding and support for the time and effort required for participation in these efforts.

Issue	Opportunities	Actions, activities, tools
3. Domestic Market Development		
Need for different strategies for different markets and audiences, products, and media (niche markets and audiences)	Enhance capacity to engage target audience	- Work with various industry associations or groups to create opportunities for interested craftpersons to display works to targeted markets and audiences or audiences at their conventions, festivals, or annual meetings - Organize Canadian or provincial touring exhibitions showcasing the finest juried craft - Prepare a guide to galleries and shows in Canada similar to the recently published “Marketing Guide for Contemporary Fine Craft in the United States”
Develop public knowledge Support specialised expertise and writing	Pursue specialised writing, market and media liaison, and trademark initiatives	- Support curatorial practices for crafts, including curatorial incubators, curatorial training, and curatorial residencies. - Support the implementation of craftpersons’ run centres, and other such supporting structures and organizations. - Extend the nascent Ontario Crafts Council “Public Galleries Craft Alliance” with public galleries and museums on organizing exhibits of fine craft and sharing curatorial and catalogue development to include galleries across Canada. - Designate national and regional marketing and media relations representatives for craft to ensure that interested magazine writers and television journalists have access to the information and support required to create stories on craft and craft producers - Explore the feasibility of a quality trademark for craft made in Canada (e.g.: “CRAFT Made in Canada”).

Issue	Opportunities	Actions, activities, tools
4. International Market Development		
Need for different strategies for different markets and audiences, products, and media (niche markets and audiences)	Enhance organizational capacity, commission new research, and develop export preparedness	- Maintain and increase participation in structures and committees, consultative or project oriented, participate in upcoming activities and events, take advantage of services as a member, and disseminate information about these initiatives. - Commission researches done on international markets and audiences for specific themes, media or products, identifying the most important international specific markets and audiences. Care should be taken to identify markets and audiences for both one-of-a-kind and production works - Create export market development committee arm through the Canadian Craft Federation, to collecting information, develop how-to guides, and provide support to individual studios to participate in international shows and trade missions. - Create an agency to promote the works of rising craftpersons whose work is judged to be of sufficient quality and interest to warrant exposure on the world market. - Produce a European market companion document to the recently published Marketing Guide for Contemporary Fine Craft in the United States. This could cover UK (London), Ireland (Dublin), France (Paris), Netherlands (Amsterdam), Germany (Berlin), and Italy. Identify and prioritize trade shows (art, design, and craft) fairs, commercial galleries, other retail opportunities. Consider market access, recognition (print promo requirements), timing and competitive issues -- such as works priced for American versus European markets -- major challenges, and major opportunities.

Issue	Opportunities	Actions, activities, tools
Need for greater exposure of craft made in Canada in international markets	Expand opportunities for participation in international shows	- Expand and co-ordinate participation in international shows. - Work with various industry associations or groups to create opportunities for interested craftpersons to display works to targeted markets and audiences. - Follow-up on the Amsterdam Glass mission of 2002. - Investigate potential in Canadian embassies in the US and Europe, possibly with the services of the cultural trade agents to launch exhibitions, and facilitate connections with commercial and public galleries and museums, either for collective or provincial projects. - Examine in connection with other relevant craft organizations and other key players in Canada, the possibility of a national / international wholesale show for craft.
	Develop international touring shows showcasing the best of craft made in Canada	- Work with the Canadian Museum of Civilisation to develop exhibition and forum. Exhibition would launch at the CMC, travel to US (New York, Washington, or Chicago - tie into SOFA) and Europe (London, Dublin, Paris, or Berlin). Tie-in with cross-sector events in US and Europe and an overall Canadian cultural goods and services promotional strategy, which would lead to ongoing export to these markets and audiences.
	Increase coherence and spending on craft by government	- Lobby for new programs, increased budget, or improved access for projects supporting craftpersons and their studios.
Develop public knowledge Support specialised expertise and writing	Pursue specialised writing, market and media liaison, and trademark initiatives	- Support curatorial practices for crafts, including curatorial incubators, curatorial training, and curatorial residencies. - Insure sufficient visual, critical and promotional material / documentation for promotion before, during and as follow-up after any activity. - Explore the feasibility of a quality trademark for craft made in Canada (e.g.: “CRAFT Made in Canada”).

4. Conclusion

This profile and development strategy of the craft sector can serve as an important step in an ongoing effort to realise the full potential of the sector in Canada today and in the future. Craft in Canada is a marvellously creative and varied set of endeavours, bound together in the common characteristic of close connections between the craftpersons, the created object, and the purchaser and user.

This study sought to describe and quantify craft in Canada. For the first time, a Canada-wide survey of craft producers has been undertaken. Our estimate of $727 million in economic activity generated by the craft sector will be refined and improved through future research, but it stands as an important benchmark for the sector. The lessons learned through the survey, as well as growing sense of common purpose within the craft sector should help make this but the first in a series of ongoing national research and data collection efforts. This study should serve as the first in a continuing series of efforts by which the craft sector takes stock of its accomplishments, its strengths and challenges, and discusses and maps the course ahead.

There are a number of ways in which additional research could provide a more complete picture of craft in Canada. Most notable among these are:

- Improved documentation of the craft activity of First Nations Peoples.
- Improved documentation on the role of private sector craft distributors, both as owners of shops and boutiques, and as show promoters.
- Improved understanding of the extent and nature of craft exports. This study estimates that 16 percent of craft sales are known to be sold outside of Canada, a remarkable figure for an activity dominated by small studios and enterprises. Till now, it was widely assumed that there was little export of craft from Canada.
- Improved identification of craft studios within Statistics Canada data. Potential changes to data gathering instruments within government could result in improved identification of craft business, and improved reporting on revenue, income, and employment trends in craft by Statistics Canada.

Improved data and information is a key to improved decision-making. An ability to demonstrate the size, scope, and growth of a sector is key to convincing government and the public that tax dollars invested in a sector have a useful impact and generate the expected outcomes, whether economic, cultural, social, or some combination.

This study also forms part of the backdrop for a renewed discussion on the needs, priorities, and strategy of the craft sector in Canada. Consultations for this study have helped to start the needed discussion. To date, one of the most encouraging outcomes of the study has been a significant degree of common understanding of the issues, and a shared sense of the most promising directions for collective action. These views are shared across players in the craft sector who have not traditionally had formal opportunities to work together as groups, namely the producers and the distributors of craft.

One of the clearest elements of common ground is the recognition of the value of working together in partnership. Both craft producers and distributors suffer to some extent because they are small enterprises that do not have significant resources to devote to industry organizations and associations. Supportive governments can play an important and necessary role by supporting the formation and activities of such organizations, knowing that these investments in co-ordination can pay off in terms of improving market opportunities, increased exports, better incomes, and richer cultural expression.

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