Canadian Heritage Patrimoine canadien

Canadian Fine Craft Niche Market Study

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1. INTRODUCTION

1.1 Study Objectives

The Trade and Investment Development Directorate of the Department of Canadian Heritage, in cooperation with the Trade Team Canada Cultural Goods and Services Working Group (TTC-CGS) for Crafts[1], initiated this study of niche connections in crafts in order to:

- Develop a better understanding of the trends, habits, experiences and conditions of Canadian fine craft exporters;
- Identify niche market opportunities with particular potential for Canadian fine craftspeople, and the events, networks, media and collector groups that may serve to connect Canadian craftspeople with these niche markets.

1.2 Study Scope and Definitions

The craft sector in Canada is dynamic and highly diverse. It ranges from individual craftspeople and studios to sizeable enterprises, working in a variety of media, and producing a broad range of products on both small and large scales. The focus of this study, however, is on high-end, hand-made, rather than production, craft.

For many Canadian craftspeople, the domestic market accounts for the largest portion of their total sales. However, because of the limited size of the domestic market, particularly for high-end products, markets outside of Canada are seen as a necessary target for increasing sales and may represent the largest market for the work in many cases. As such, this study focuses on *export* markets for Canadian fine craft, rather than *domestic* sales.

In the context of this study, a niche is understood as an opportunity for the craft entrepreneur to exploit a particular economy. A niche market is therefore a specialized export market for a particular product or service.

[1] See Appendix One for a list of Working Group Members

We have used the term fine craft in this report to refer to all hand-made, unique items with inherent artistic qualities. In certain markets, the term “contemporary decorative arts” may be more accepted for the highest end of the fine craft spectrum. In the UK, the term “applied arts” has currently the highest cachet, but “fine craft/contemporary fine craft or designer/makers” is now being used by the Arts Council of England in a forthcoming study.

1.3 Study Methodology and Scale

The research conducted during course of this study was carried out in two distinct phases. The initial phase of research focused on the exporter perspective, and involved interviews with members of the working group, executive directors of other provincial craft councils, cultural trade commissioners and profiles of 42 craft producers who have been active in export markets, who have attempted to export, or who intend to enter the export market. In addition to helping to identify key trends, success patterns and obstacles to exporting, this research enabled the consultants to identify a long list of current and potential niche markets for more detailed research.

During the second phase of research, the consultants researched various niche market opportunities for Canadian craft from the buyer perspective. These opportunities were explored through a series of interviews with craft industry leaders, wholesale and retail craft show organizers, gallery[2] owners, professional craft organizations and collector groups in target markets.

This study was conducted over an eight–week period during February and March 2005. Given this extremely short time frame and the complexity of the subject, it was not possible to explore in detail all of the niche opportunities for the export of Canadian fine craft. Therefore, in consultation with the TTC-CGS Working group, choices were made to explore a small number of geographic, media and thematic niches, as could be explored in the available time. These niches were chosen according to current strengths and export growth potential within broad and specialized markets.

[2] In the American Context, the term “gallery” refers to a commercial craft gallery, as well as higher-end gift shops of the type often operated by museums. The term “museum” or “art museum” is used when referring to public art galleries.

2. CRAFT EXPORTER CASE STUDIES

In order to gain a better understanding of export activity among Canadian fine craftspeople and to identify success patterns, strategies and obstacles, the consultants profiled 42 craftspeople from across the country and from a variety of disciplines[3]. The majority of those profiled have achieved some degree of success in export sales of their craft products or services, although the consultants also spoke to a number of craftspeople who have been unsuccessful at selling their work outside of Canada in order to explore barriers that may have contributed to this outcome.

2.1 Level and Importance of Export Sales

Of the 42 case studies conducted with individual craftspeople, 55% reported either a moderate or significant level of success selling their work outside of Canada[4]. The highest reported percentage of sales from outside Canada was 90%.

Reported Level of Export Sales

Level of Export Sales	Number of Case Studies	Percent of Case Studies
Minimal (0% -10% of total sales)	19[5]	45%
Moderate (11 - 49% of total sales)	8	19%
Significant (50%+ of total sales)	15	36%
Total	42	100%

With only a few exceptions, and regardless of the overall percentage of sales outside the country, the craftspeople profiled during our research reported that export activity was very important or was anticipated to be important to their overall success. Those artists creating higher-end and more experimental products reported turning to export markets because of a lack of domestic market for their work. As well, those making crafts that may be categorized toward the production craft end of the spectrum reported that export sales were important to them since they may have reached a saturation point in the domestic market.

Beyond the income derived from the sale of products or services in export markets, many of those interviewed reported that the prestige associated with exhibitions, sales or

[3] A list of craftspeople interviewed during the course of this study can be found in Appendix Two.
[4] One case study had previously exported a production line of craft, but not her one-of-a-kind craft.
[5] These figures apply to exports in recent years. A number of case studies reported significant export sales prior to 2003.

teaching in foreign markets has a significant effect on their profile and sales in the domestic market. Interestingly, even those who had exhibited internationally, but did not actually sell any work as a result, reported that this international activity ultimately had a positive effect on the sales of their work overall.

2.2 Key Current Export Markets

2.2.1 Geographic Markets

By far, the most important current export market reported by craftspeople profiled in this study was the American market. The vast majority of craftspeople reporting export sales indicated that the United Sates was their primary export market or market of choice. Asia, specifically Taiwan and Japan, were locations of some very limited sales on a sporadic basis. Europe, specifically Germany, England and France were also locations of some very limited sales.

A number of craftspeople who were profiled during this study also reported "indirect" export sales through sales to tourists who are visiting Canadian galleries where their work is sold. Although it is not possible to determine the level of sales or pinpoint the ultimate destination of these works, it can be said with some confidence that Canadian fine craft has found its way around the world in the hands of tourists who have purchased the work during visits to Canada. In addition, Canadian and US galleries carrying the work of Canadian artists sell to a global community of collectors, resulting in Canadian works reaching high-end collections worldwide.

2.2.2 Consumer Profile

Fine craft artists often do not sell directly to the consumer, but rather sell through a retail system; nonetheless, many have still been able to gain a sense of who the ultimate purchasers of their work are through communication with the galleries representing their work. The majority of the case studies, particularly those craftspeople who create higher-end works, reported that the end buyers of their works in export markets are typically wealthy, well educated professionals. Many buyers fall into the category of junior or senior collectors and are very knowledgeable about craft, art and design in general.

2.3 Success Factors

At first glance, the experience of each of the case studies who have had success in export markets appears to be largely idiosyncratic. However, upon closer inspection there are a number of common factors, activities and tools that emerge.

Quality and Uniqueness of the Work

Our research would suggest that the Canadian craftspeople who are succeeding in selling their work in export markets are doing so first and foremost because of the quality and uniqueness of the products. Ultimately, quality and uniqueness are the most important factors in determining success in the export market. The country of origin of the producer does not in any significant way appear to be a factor in the decision to purchase.

Juried Exhibitions, Competitions and Public Museums

Among the 42 case studies, a common means of initially entering into export markets was through competitions or juried exhibitions. Interestingly, in most cases, these activities did not lead immediately or directly to sales. Nonetheless, the exposure and connections with other artists, collectors and gallery owners that grew out of participating in juried exhibitions and competitions set in motion a series of events that ultimately led to other exhibitions, commercial representation and sales in export markets.

An occasional, but important outcome of taking part in juried exhibitions for some case studies was the purchase of a work by the museum sponsoring the show. Having works included in the collections of public museums gives ‘legitimacy’ to the works contained in them, approved as they are by the scholarship and professional opinion of the curators. This enhances the value of the work and may make purchases of other work more desirable to collectors.

Network Development (conferences, residencies, study tours, publications)

Although each export success story reported in our research came about in its own unique way, one very important factor common to all was networking. Connections made at local, national and international conferences, residencies or study tours are an important way to have the work seen and to develop a reputation in the market. The personality and confidence of the artist, which is often best communicated through personal contact, was often noted as a key factor in attracting export interest.

In particular, connections made with other artists are an important way to advance a career, as artist recommendations often lead to group exhibitions and, in some cases, immediate gallery interest. According to the case studies, connections made though group exhibitions may not have resulted in any sales, but often led to other shows, furthering networking with other artists and purchasers and garnering media coverage. This publicity may then have attracted commercial representation, which ultimately resulted in sales.

Agent Representation

Although this method is uncommon, in a small number of case studies, craftspeople broke into export markets with assistance from an agent whose promotional efforts on their behalf led to commercial representation.

Targeted Promotion

In a small number of instances, case study artists reported successfully securing commercial representation though a cold-call approach, either by sending their portfolio for review or showing samples of their work on-site without any previous contact.

Targeted Events and Trade Initiatives

Case study research suggest that events such as the Atlantic Craft Trade Show and provincial and national trade initiatives that put buyers directly in touch with Canadian craftspeople in a focused setting are an effective way of developing links that lead to future sales and commercial representation. A particularly effective way of securing commercial representation for Canadian craftspeople in the US market has involved bringing US gallery representatives to Canada to view the work in person.

Commercial Representation

Those case studies reporting the most success in export sales are more likely to have commercial representation either through fine craft galleries or high-end tourist gift stores. Commercial representation is by far the most important means of achieving significant sales in the US market. A combination of many of the activities and factors listed above was necessary for ultimately obtaining this representation.

Participation in Major Craft Events

For a number of the craftspeople profiled during this process, participation in a major craft/fine art event such as SOFA or the Rosen shows was the pivotal point in the development of their export sales. While it was reported that participation in these shows did not always result in any immediate or significant sales, participation often led to additional gallery representation, a higher profile and ultimately higher sales and commissions in the longer term.

Craft Services

On the craft services side, many of those who were interviewed publish and teach about their craft, particularly in the United States, which is as seen as an important form of exporting Canadian craft expertise and developing an international profile. Some of the case studies derive a modest amount of their total export sales from craft services, up to 25% of their export sales.

Network Maintenance

Our case studies illustrate the importance of maintaining contact with those who make up the export network. In particular, the ability to create and maintain a close relationship with galleries owners is essential. Some case studies reported seeing significant increases in sales following visits to meet with gallery owners or as a result of attending openings.

2.4 Challenges and Barriers

The case study interviews revealed a number of challenges and barriers to establishing or expanding the sales of Canadian fine craft to niche markets, many of which are already well known. Since some of these challenges and barriers are geographically specific, they are outlined below according to geographic market.

2.4.1 United States

- **Shipping/customs** – Difficulties with shipping and customs between Canada and the United States were the most commonly cited barriers to Canadian craftspeople establishing sales in the American market. This is a well-documented problem that is such a sufficient disincentive that a number of case studies will not, or will no longer, consider shipping their work to the US for sale. That being said, a number of those who make the largest portion of their sales in the United States reported no problems with transporting their work across the border.

  The key factors here would appear to be a keen understanding of border issues, the involvement of an agent or broker and/or a good relationship with a gallery that assists with these issues. Of course not all craftspeople are able to establish such relationships and there is a distinct lack of agents specializing in craft. Therefore, the majority of craftspeople are left to deal with shipping/customs issues on their own.

In addition to customs issues, the high cost or lack of available insurance to cover shipping of goods represents a considerable obstacle to many craftspeople wishing to sell their work outside the country.

- **Lack of National Profile/Promotion of Canadian Craft at Home** – Our case study research suggests that the low profile and lack of promotion of Canadian craft at home represents a barrier to sales in the US market. A lack of on-going exhibitions at major public galleries and museums in Canada hampers the ability to attract serious collectors in some cases. The absence of a national fine craft show and magazine are also considered to contribute to this lack of profile.

- **Lack of Time and Necessary Resources -** A number of those interviewed as case studies cited a lack of time and resources as barriers to initiating or expanding the sales of their work to niche markets. Many are already spending a considerable amount of time on the administrative aspects of their careers, which takes away for time needed for the creative and production aspects. Export sales require solid market research, network development and high quality promotional material, all of which represent time and financial barriers for many Canadian craftspeople.

- **Exclusion of non-American work** - Some exhibitions, shows and galleries in the United States only accept the work of American craftspeople, which effectively makes those venues inaccessible to Canadians.

- **Other Restrictive Regulations** – American laws prohibit non-citizens from selling their work directly to consumers at wholesale or retail craft shows. As such, Canadian craftspeople must engage the services of an American citizen to handle sales transactions. Some craft show organizers attempt to facilitate a means around this law by providing centralized processing of sales orders. However, it is up to Canadian exhibitors to be fully aware of US laws surrounding business transactions before choosing to attend a show. Penalties for non-compliance can be onerous.[6]

[6] For additional information on exporting and border crossing issues, please refer to the "Marketing Guide for Fine Contemporary Craft in the United States" commissioned by the Department of Foreign Affairs and International Trade in 2002. See Bibliography.

2.4.2 Other International Markets

Many of the same barriers and challenges that apply to the US market also apply to other international markets. However, in addition to those challenges/barriers, our case study research indicated the following additional barriers/challenges also exist in relation to exporting to other international markets:

- Lack of data on potential markets;
- Lack of existing networks and contacts with dealers, associations and collectors;
- Distance and language barriers, which add to the difficulty of maintaining networks, once they are established;
- Exorbitant shipping costs.

A number of artisans reported that they had chosen to avoid international markets after experiencing frustrations with the many challenges that faced them. Some were able to offset US sales with diversified products in Canada to certain extent; others were not able to do so, but nonetheless decided that at this point in their career the challenges were not worth the effort. However, despite the many challenges in the international marketplace, it is clear that exporting is key for many of those interviewed during the case studies, especially those producing high-end and experimental work. While some expressed a desire to work within the domestic market only, more have found that the Canadian market alone cannot adequately support them financially or artistically.

3. Niche Market Research

Based on the case studies conducted by the consultants, reviews of existing data, as well as input from members of the TTC-CGS working group and directors of other provincial craft councils, the consultants considered a “long-list” of potential niche markets for Canadian fine craft. These markets included:

Geographic Niches:

- United States;
- Asia (in particular Japan, Taiwan, and Hong Kong);
- Europe (in particular the United Kingdom, Germany and the Netherlands).

Thematic Niches:

- Aboriginal craft[7]
- Western-themed craft
- Spiritually based craft including Judaica
- Art dolls

Media-based Niches:

- Glass
- Ceramics
- Metal (including jewellery)
- Fibre
- Wood

In order to assess which of these niche market opportunities have the greatest potential for export and to identify related distribution channels, networks, organizations and collector groups, our team consulted with market-knowledgeable individuals, including gallery owners, organizers of major retail and wholesale craft shows, representatives of professional craft organizations, collector groups and Department of Foreign Affairs and

[7] While our research indicates strong potential for increased exports of aboriginal craft, a separate study regarding the export potential of aboriginal arts and crafts is being conducted at this time. Therefore, we did not explore this particular niche market any further during the course of this study.

International Trade staff in Canada, the United States, Europe and Asia.[8] The following section of the report summarizes the results of this research.

3.1 Analysis of Potential Geographic Niches

3.1.1 United States

A number of factors make the United States an attractive target market for the export of Canadian fine craft including the following:

- **Size of Potential Market:** With a population of 281,421,906[9], the United States has a population which is almost ten times that of Canada;[10]

- **Strength of the Market**: The market for fine craft in the United States is well established, sophisticated and has demonstrated tremendous strength. According to the Craft Organization Development Association (CODA), the direct impact from sales of craft in the United States in 1999 was estimated at US$13.8 billion;[11]

- **Positive Consumer Trends:** Like many other sectors, the American craft market has experienced a degree of "Wal-Mart-ization," with large retailers such as Crate & Barrel importing low cost goods from countries such as Mexico. However, a number of recent studies have documented a growing and opposing trend in the United States. These studies suggest that baby-boomers in large numbers are expressing their distain for large retailers selling mass-market goods, by buying greater numbers of higher-end custom and luxury goods.[12] Given that much of fine craft falls into this category of purchases, this trend would seem to bode well for the craft sector;

- **Quality & Extent of the Infrastructure**: The United States has an extensive and well-established infrastructure that supports the development, promotion and sales of fine craft. This infrastructure consists of a wide network of private galleries and public museums, numerous wholesale and retail craft shows, specialized professional craft organizations, collector groups and dedicated craft publications;

[8] For a list of key informants consulted, please see Appendix Three.
[9] 2000 figures according to the US Census Bureau
[10] 2001 Census figures according to Statistics Canada
[11] C***ODA Survey: the Impact of Craft on the National Economy*****, 2001**
[12] ***Trading Up: Why Consumers Want New Luxury Goods***, Michael Silverstein, 2005, ***Competing in the Age of Wal-Mart*****, The Crafts Report**, March, 2005

- **Proximity and Affinity:** Canada shares a 5061-kilometer border with the United States, and 80% of Canadians live within 160 kilometers of the US border. In addition to sharing a language, Canadian and Americans share many other cultural affinities.

3.1.2 United Kingdom

Similarly, the United Kingdom is attractive for Canadian exports for a number of key reasons:

- **Size of Potential Market:** According to the UK National Statistics Office, the population of the United Kingdom during the last census year[13] was 58,789,194, or almost double the Canadian population during the same year.

- **Strength of the Market**: The market for craft in the United Kingdom has historically been strong. According to research, approximately _ of the buying population would consider buying craft. Annual sales figures for craft are estimated to be in excess of £800 million annually.

- **Strength of the Economy:** The current economy in the UK is buoyant, with house prices rising 6% per year and strong levels of disposable income. An EU economic report released in April, 2005, predicts overall economic growth in the UK to be 2.8% in both 2005 and 2006, which is higher than the rest of the EU, at 2% and 2.3%, but lower than the United States, at 3.6% and 3.0%.[14]

- **Global Outlook**: There is an increased internationalism in the UK, which translates to openness to other cultures. In part, the UK as a culture is moving away from the extreme insularity of its past. This is due to many factors, including improved travel and communications, the impact of a large multi-racial and multi-cultural population from the former Commonwealth as well as elsewhere, and also the impact of a resurgent Europe and the economic freedom of the common market. Excellent education institutions in Europe are producing excellent graduates who produce influential work that is now more accessible to the UK market. French and English are widely spoken in Europe. All this affects crafts as part of a general societal and economic trend, radiating out from London, one of the most cosmopolitan cities in the world.

3.1.3 Other European Countries

[13] 2001 figures
[14] Reported in the Halifax Daily News, Tuesday April 5, 2005, p. 13.

Initial research indicates that other European countries, such as the Netherlands, Sweden, Denmark and Germany, hold potential for greater Canadian fine craft exports.

- **Size of Potential Market**: The combined population of the Netherlands, Sweden, Denmark and Germany alone are over 113 million.

- **Proximity and Access to Other Markets**: The arrangements of the European Community and the relatively small size of Europe provide ease of access to other EU member states. Although the UK and Europe have different market characteristics, this proximity may provide cost savings if these other markets are investigated at the same time as the visit to the UK.

- **Receptivity to Craft**: Because of the long and well-developed traditions of craft in these European countries, there is generally a good receptivity to fine craft products.

- **Fewer Language Barriers**: English and French count among the EU official languages. Therefore, there should not be as significant a language barrier as in other export markets.

3.1.4 Asia

There is little data available on the market for fine craft in Asia; however the following analysis is based on input from Canadian cultural trade officers in Japan, Hong Kong and Taiwan.

- **Cultural Barriers**: Canadian craftspeople face considerable barriers in selling their work in Asia. Differences in business practices, consumer tastes and language represent major obstacles for Canadian exporters.

- **Distance Shipping Costs**: Distance and the cost of shipping are also factors that lessen the attractiveness of the Asian market for the export of Canadian fine craft.

- **Limited Potential Demand**: The greatest demand for fine craft in the Asian markets seems to be primarily related to craft that is rooted in Asian culture, which would represent a limited segment of Canadian contemporary craft products.

3.2 Priority Geographic Niche Markets

The foregoing research leads to the conclusion that the United States holds the greatest potential for expanding the export of Canadian fine craft, with the United

Kingdom holding the second greatest potential. As such, with direction from the TTC Craft Working Group, these two of these geographic markets were selected as the focus for more in-depth research during the course of this study.

While other European countries, including the Netherlands, Sweden, Denmark and Germany appear to hold potential for greater Canadian fine craft exports, these markets are of secondary importance at this time to the US and UK. However, as time and future funding allows, more in-depth research into these market may prove beneficial for some Canadian craft exporters.

While some parts of Asia may hold some potential for greater Canadian exports of fine craft, significant obstacles such as high shipping costs, a less well-developed buyers market for contemporary fine craft, an immature gallery system and language barriers render this market a lesser priority overall.

3.3 Market-based Key Informant Research

Having identified the US and UK as priority geographic niches, the consulting team conducted 72 interviews with key knowledgeable individuals[15] in these markets, as well as in Canada, to identify specific media-based and thematic opportunities for Canadian artists within these markets. The following section summarizes the key findings and issues to emerge from this research.

3.3.1 Overall state of the market

The majority of galleries consulted during the course of this study characterized the overall demand for fine craft as either “stable” or “good” in the United States. A significant number of galleries characterized the market as “great” or “growing”. Our analysis of responses revealed a clear separation between the experiences of high-end and mid-range galleries. Mid-range galleries reported more susceptibility to the “ups” and “downs” that have characterized the American economy in the last five years. The early years of the decade saw some shrinking margins and reduced sales for these galleries. Profits are recovering, but incrementally. There is still a sense of ‘caution’ as results can be quite volatile from month to month. Mid-range galleries reported that their customers are somewhat price sensitive at this time and “want something special that does not break the bank.”

[15] Please see Appendix Three for a list of key informant interviews.

The UK has not experienced the same economic downturns that have affected craft sales in the US. As such, the UK market generally was described as “buoyant” by many people. Amanda Game, of The Scottish Gallery which is one of the oldest private galleries in the UK, said that the market for crafts “has never been so good.” While the market is strongest and most international in the London area, regional markets also report a confidence in the future. Aggressive strategies by the Arts Council of England and the British Crafts Council are aimed at developing the collectors’ market further and at further development of regional markets.

In the US the effects of economic downturns do not seem to have affected the higher-end galleries to the same extent. Buyers of craft at the highest price-points appear to have continued to buy throughout recent times of economic uncertainty.

Overall, higher-end galleries were more likely to report more positive views of the market. For instance, one owner reported seeing an increasing merger of the fine craft market with the conventional fine art market as craft becomes increasingly recognized as a valued art form. This owner also feels that the streams between commercial craft and unique high end or sculptural decorative arts are becoming more pronounced, further distinguishing high end fine craft in the marketplace and increasing its perceived value.

Responses were somewhat mixed in terms of price point trends. There has been some pressure on high-end galleries to offer items in a range of prices in so that new collectors can more readily enter the market. A lower price range in this case is reported to be generally in the $2000-5000 range. However, one gallery owner noted that the $1500-$8000 price range is the softest at the time being, with both higher and lower ranges selling well. Other galleries did note that the highest priced items are often the easiest to sell since collectors at that level are already so knowledgeable about the artists and the work that the price is not questioned.

There is evidence that American and European collectors travel to the UK to buy, and that international collectors also buy in the US. Globalisation appears to be a feature at the highest level where high margins are possible, and at the production craft/giftware level where quantity can provide economies of scale, but is much less a factor at the middle levels of quality and price.

Our research also suggests that the marketplace for fine craft is more sophisticated and educated than ever and that more experimental work is being produced now than ever before.

Many galleries now combine sales of fine craft with sales of paintings, prints and sculpture to an extent that did not occur until recently. The division between fine art and craft was at one time so strong that to exhibit them together was to confuse the buyer and deter sales. Today, the fact that many galleries both in the US and the UK now combine them is a sign that crafts are recognised more as being an art form with their own scope, conditions and appeal. This apparently works well for many galleries who now find that the mix brings in a wider range of buyers, and may even offset the stigma which can cling to “craft”. While positive, another effect of this may have been to confuse the terminology more than ever.

3.3.2 Factors Influencing Purchasing

The most commonly noted factors that influence a gallery’s decision to represent an artist’s work are:

- ***Personal appeal of the work***

This highly subjective evaluation criterion was noted consistently as a major factor influencing the decision to purchase, both by the gallery and by the ultimate collector. This criterion is based on intrinsic and artistic values of the work and cannot be quantified. Owners acknowledge that this gives little guidance to artists seeking representation, but cannot be more definitive than, “it must speak to me.”

- ***Quality of the work***

In the US and the UK, quality and craftsmanship are key to influencing the decision to purchase. A clear artistic expression must be evident. One gallery noted that the ‘cultural significance’ evident in the work is of the greatest importance to his collectors; buyers want to know that they have collected a piece that represents the best of this culture at this moment in time.

- ***Uniqueness***

Uniqueness, not only in the greater marketplace, but within the gallery or show where work is being sold is a key factor influencing purchasing. Many galleries require exclusivity, ensuring that the work will be unique to the local marketplace. Many owners commented that much of the work they see is too repetitive and some noted that Canadian craftspeople, coming as they do from a different milieu, might have a competitive advantage in this respect.

- ***Reputation of the Artist***

Some buyers of fine craft, particularly collectors, are not only influenced by the personal appeal, quality and uniqueness of the work, but are also influenced by the reputation and personal history of the artist who has produced the work. Direct contact with the artist, often facilitated through the gallery, adds to the development of interest. Artist statements were often noted as a visible selling feature of the work. Many serious collectors seem to enjoy learning about the artist's perspective and chart the evolution of their work throughout their career. Some private galleries cultivate the inclusion of their artists' work in public collections and provide material to writers in order to raise the artist's profile.

In some media, particularly ceramics, in both the US and the UK, the recent emergence of a secondary market marks the work of artists with an established reputation as assets which will appreciate, just like a painting. While many collectors do not place a great importance on asset appreciation, seeing an increase in the value of an investment can hardly be a deterrent, and the lack of a secondary market for fine crafts until recently may have kept some experienced collectors out of the market altogether. For such artists, this converts into better prices for new work.

In the UK, successful artists are often "pedigreed" by impressive academic qualifications and exhibitions. Canadian artists entering the UK market will similarly be judged on such credentials and need to provide background relevant background information of education and exhibitions.

- ***Pricing***

All but the wealthiest of fine craft collectors are influenced in their purchases to some degree by price. As noted above, there has been some evidence of softening at the middle price points. As a result, many of the galleries consulted during the course of this research noted that they have had to make a conscious effort to carry a broader range of price points in order to cater to all ends of the buyer spectrum. A mid-range gallery may carry prices from $5-$15,000 while a higher end gallery often starts at a few thousand dollars and can work up to six figures. For a higher end gallery, the price must reflect the quality; some work is turned away if priced too low. For mid-range galleries, the price sensitivity is in the opposite direction; prices must remain low enough to attract buyers.

Pricing in the UK may be one disadvantage to this market. One key informant in the UK noted that prices that could be charged in the US might be as much as twice what would be paid in the UK for similar objects. This may differ with various media and where gems or precious metals are used, the difference may be less marked. However, offsetting this situation somewhat may be the fact that currency rates have moved in favour of the _ in relation to the C$ and the US$; an added factor is the decrease of the US$ against the C$.

3.3.3 Profile of and Openness to Canadian Craft

Current Profile

Of the galleries and show promoters interviewed during this study, the majority already carry or have carried the work of Canadian craftspeople. Despite this finding and the fact that a number of individual Canadian craftspeople in a variety of media have been very successful at selling their work outside the country, our research suggests that Canadian fine craft as a whole has a very low profile internationally. In contrast, other countries such as Australia, Denmark and Germany appear to have begun to successfully develop a national profile.

This is not to say that Canadian craft is completely off the radar screen of the American craft community. Every year the number of Canadians attending major American shows, such as the Buyers Market of American Craft, increases and the effects may be starting to show. As evidence, the Crafts Report recently published a special feature devoted entirely to the Canadian craft community.[16]

The Canadian craftsperson enjoys some competitive advantages, including: favourable exchange rates; high quality educational institutions that produce graduates capable of competing at the highest levels internationally; a viable network of supportive organisations at the provincial level; and a solid though small domestic market.

Openness to Canada Craft

Despite a general lack of profile internationally, the majority of gallery owners and show promoters consulted during this study expressed eagerness or at least an openness to the possibility of selling the work of more Canadian artisans. One gallery owner responding to a question about his interest in representing more Canadian craftspeople stated enthusiastically, “Yes! Send people our way. We’ll take a look.” In general, as business people, gallery owners are keen to get their hands on the best quality, most unique work, regardless of where it originates

This openness to the possibility of selling more Canadian craft, combined with a general lack of awareness, presents somewhat of an inherent paradox in the attitude toward Canadian craft. As one gallery owner so aptly phrased it, “there is no prejudice to exclude Canadian craft but no drive to include it.”

[16] *Go Canada! An In-depth Look at Canada’s Growing Crafts Community*, Crafts Report, June 2002

Branding of Canadian Craft

There has been some discussion in the literature and within the craft sector about the advantages of "branding" Canadian craft so as to raise its profile internationally. Our research indicates that this might in fact be counter-productive. The work of Canadian craftspeople can be sold in many galleries in the US expressly devoted to fine "American" craft because the work is not overtly identified as being Canadian, but is considered to be part of the broader North American or global market.

In the UK, there is a residue of affection for Canada, and a vague appreciation of a Canadian identity. Scottish respondents, in particular, tended to be warm towards what they saw as a shared heritage. In the UK, the Canadian may also be seen as North American but with their own identity.

Ultimately, the majority of craft buyers in both markets base their decisions to purchase on quality, uniqueness, price and personal taste. The country of origin of the artist is generally not a factor, although it may become part of the "story" of the object, which is later told to friends and fellow collectors.

3.3.4 Sourcing of Work

In both the US and the UK, galleries reported relying on multiple channels to source new work for representation. The most common means include:

- ***Word of Mouth Recommendations***

Word of mouth references from other artists and galleries were commonly noted as a very important and frequent means of finding new artists to represent.

- ***Sculptural Objects and Functional Art Exposition (SOFA)***

In the United States, SOFA, particularly the Chicago show, seems to be continuously growing in prominence since its inception in 1994. Judging by the number of exhibiting galleries and the growing exhibition space requested by individual galleries, the high-end collector market is flourishing. Over 30,000[17] people now regularly attend SOFA over its three days of exhibition. It is felt that most serious collectors in the world attend on a regular basis. Not only is SOFA seen to be the place to see the collection of the best fine craft in the world, it is a 'must-

[17] Mark Lyman, Producer of SOFA, roughly estimates that the top echelon of collectors constitutes about 300 of these 30,000 individuals.

attend' social and networking event in the collector community. The lecture series is well attended; many associations and groups have a presence there and some have held their annual general meeting at the conference.

Galleries at the highest levels, particularly on the East Coast, attend SOFA to connect to collectors as well as to see new works from established artists, emerging artists and established artists from other countries. Inter-gallery dealing at SOFA is not uncommon, particularly with international artists. Many galleries noted that attending SOFA is becoming more and more important in order to reach a large number of collectors under one roof. Most major collectors will attend SOFA as well as make personal visits to the gallery.

- ***COLLECT***

This new show, which opened in 2004 at the Victoria and Albert Museum in London for the first time, is the UK equivalent of SOFA. The exhibitors are mainly galleries, but some are artists who make work on commission. It has already had an impact on the market in the UK, and has raised the profile significantly of applied arts in the media. US collectors are known to attend, and exhibitors as well as collectors from Europe are also there.

In 2004, 10,000 people attended COLLECT. Sales were approximately £1million. There were 50 exhibitors, of which 41 were galleries. The others were individuals who take commissions and therefore do not deal with galleries.

In 2005, despite scheduling problems, there were 43 galleries & 4 individuals. Attendance was again 10,000 and sales were £1million. This is an average sale per exhibitor of £20,000 in 2004 and £21,276 in 2005.

Fully 90% of exhibitors met new clients as a result of attending COLLECT.

- **Chelsea Craft Fair**

The Chelsea Craft Fair is a juried show held each October in Chelsea, London. There are 220 exhibitors, of which generally 30% are first time exhibitors. The application deadline is end of February for the next October. The price point for an individual art work is up to £200,000.

- ***Wholesale and Shows***

In the United States, ACC's Baltimore show, the Buyer's Market of American Craft (Rosen Show) and New York and San Francisco Gift Shows are important for larger retail galleries representing a wide variety of one of a kind item that are less conceptual/sculptural/high end.

The Chelsea Craft Fair is the premier retail show in the UK, taking place in October. Exhibitors are mostly individual artists, not galleries.

- ***Specialized Exhibitions and Conferences***

A number of specialized galleries reported that they found specialized exhibitions and conferences organized by major media-specific organizations and collector groups to be valuable means of sourcing new work. These organizations include:

US:

- NCECA (National Council on Education for Ceramic Arts)
- SNAG (Society of North American Goldsmiths)
- Collectors of Wood Art Forum show
- GAS (Glass Art Society)

UK:

- Spring Fair, National Exhibition Centre, Birmingham, (February)
- International Jewellery Fair, Earl's Court, London, (September)
- Goldsmiths' Hall Fair, London, (jewellery) (October).
- Brilliantly Birmingham (jewellery)(Nov/Dec)
- Dazzle (traveling, selling jewellery show to 4 cities in the UK)
- International Watch and Jewellery Fair/Guild – events in USA & UK
- International Glass Festival, Stourbridge, UK
- International Ceramics Festival, Aberystwyth, Wales

- ***Portfolio Reviews***

While few galleries reported finding new artists as a result of receiving unsolicited portfolios, a small number of galleries and artists did report that this method had been the first step in the development of a working relationship. Some galleries reported that they have set times during the year when new portfolios are reviewed in an in-house 'jurying' process.

The process of approaching galleries in the UK tends to be more formal than in North America. Michael Regan, Visual Arts Officer with the Canadian consulate in London, recommended that most galleries prefer initial contact by mail or email to an unannounced call in person. Galleries generally just want a few typical photos in digital form and a resume. If the galley is interested, a fuller discussion ensues.

▪ ***Other***

Other means for sourcing new work noted during our research included exhibitions at public museums, magazines, and use of the Internet, which is levelling the playing field for craftspeople who live outside major urban centres.

3.3.5 Buyer Profiles

General Profile

While it is difficult to develop a single buyer profile in a market that is characterized by such diversity, key informant research in the US and the UK suggests that buyers of high-end craft are typically:

- Affluent or have significant levels of disposable income[18];
- Professionals or entrepreneurs;
- Well educated;
- Couples;
- 40+ and many retired;
- Slightly more females than males;
- A small but important percentage could be classified as "collectors".

One gallery noted that some collector couples often tend to make decisions based on decorating choices, while individual customers are less concerned with décor and often make more "interesting" artistic decisions. Some look for themes, styles, or to make an investment. But most collectors buy for personal appeal of the piece, appreciation of the quality and artistic content, or connection to the artist and/or to fill a perceived gap in the collection.

Collector Market

The collector market has very close ties to the gallery system. Galleries tend to have a consistent collector base that looks to the owner or staff for a valued opinion on the work and trusts them to scout out new work. The gallery's reputation for securing the best work is paramount; the most serious collectors will establish a relationship with a gallery they feel assures them of seeing work of the highest quality.

[18] According to Wendy Rosen, Publisher of AmericanStyle Magazine www.americanstyle.com and Producer of the Buyers Markets of American Craft www.americancraft.com , the average household income of contemporary craft consumers is $100,000. © Rosen Group Inc. According to Toni Sikes, CEO of Guild.com, this matches the profile of Guild.com customers.

Key informants noted that the gallery business is very personal and relationship-based, with owners spending a significant amount of time with collectors in the gallery as well as keeping the collector's interests in mind while scouting out new work. Owners noted that they often send personal notes to collectors to inform them of the latest work in the gallery or send pieces on approval that may fit into their collection. From interviews, it appears that collectors seek out new works most frequently through the gallery system and the major annual fine craft events rather than by approaching artists directly. Therefore, the gallery owner becomes a crucial advocate in bringing artist and collector together.

When asked where their collector base originates, many high-end galleries noted that they operate on a global level. Their collector base cannot in any significant way be identified with their local geographic area. As galleries move from the highest end toward a more mid-range of product offering and price level, the collector market becomes progressively more localized. Nonetheless, many of these mid-range retail galleries also reported significant national collector interest.

During the course of our research, galleries often noted the current quandary of the aging collector market. Many collectors are getting older, their houses and offices are filling up with collected work, are they are now at the point of considering a donation strategy. As a result, galleries are actively trying to cultivate younger collectors or are at least aware of the need to reach out to a younger base. Some have taken on the role of the art educator much more so than in the past. Many galleries are actively reaching out by sponsoring activities, partnering with educational organizations or associations, having artist statements exhibited prominently in the gallery, and holding lectures for those new to the collector world.

Our research revealed differing opinions on the potential of this younger collector market. Some feel that the understanding or appreciation of art among this 'next generation' is not as substantial as that of the previous one. Some galleries reported finding new collectors had applied little thought to the collection as a whole and were generally "unfocussed" about their purchases. New collectors seem "befuddled" by the masses of information in the market and looked to the gallery for guidance and clarification, perhaps more so than the previous generation had. One gallery reported that there were few younger collectors currently active, perhaps in some cases as a rejection of their parents' interest in fine craft.

On the flip side of this issue, some galleries are finding that new or younger collectors are entering the market place consistently, that they are more adventurous, and are generally "coming along nicely". One gallery noted that this next generation has more visual appreciation and sophistication with color than the previous "bookish" generation.

More agreement was found in the notion that young collectors are entering a market with high established prices. In comparison, the previous generation of collector was able to enter the market as the fine craft area was growing, artists were beginning to establish careers and prices were substantially lower. As a result, many high-end galleries reported that they are carrying some works at the lower end of the price scale, (which is still at the level of several thousand dollars), in order to attract the younger collector.

The motivations of the collector are fascinating and ultimately difficult to pinpoint. There are many speculations, which we could not examine in any depth, including the theory that collectors of craft collect because they feel an affinity for the sort of alternative thinking which the idea of craft still connotes, 150 years or so after the beginning of the Arts and Crafts movement. Most of the people consulted during the course of this research, though busy, seemed to enjoy the chance to talk to someone who shared their interest in the field. Many spoke of it literally as a “labour of love”. Collectors almost certainly respond to this dedication and commitment.

One American furniture maker mentioned that, by definition, most of his customers who could afford his work had spent most of their life thinking about certain things that enabled them to get to the stage of affording his work. He suggested that they were starved for imaginative and emotional experience and were using the process of selecting or commissioning his work as a way of catching up on this aspect of their personal development. One gallery owner reported that he thought his entrepreneurial collectors were ‘visionary’ people who appreciated visionary people in other spheres of life, such as in fine craft.

There are contradictions within the collector market. We found, for instance, that ceramics are often bought by people who readily identify themselves as collectors, whereas jewellery buyers do not generally think of themselves as collectors.

Whatever the personal reasons may be, it seems that many collectors begin with a single purchase and only gradually recognise that they have become a collector. Once they have, many enjoy the detective aspects of spotting a promising maker, assessing his or her work, and picking an especially fine piece. For some collectors, the detection, the research, the stalking and the act of acquisition are part of the pleasure of collecting.

3.4 Media/Thematic Strengths

It is difficult to precisely identify specific craft media, product types or themes that have the greatest export potential for Canadian craftspeople, since this is a market that it largely driven by highly individual and idiosyncratic tastes, which defy “market trends.” As well, the fine craft field includes a wide range of disciplines, any one of which has potential for increased exports. However, the limitations of this study allowed for only a limited number of geographic, media-based or thematic niches to be studied with any depth. Therefore, a small number of niches were selected for further study following consultation with leading members of the craft community and the study's working group, on the basis of their current strength in the market or future potential. These niches were:

Geographic niches: United States and the United Kingdom, for the reasons outlined in Section 3.2.

Media-based niches:

- Priority Niche One: Jewellery (US & UK)
- Priority Niche Two: Ceramics (US & UK)
- Priority Niche Three: Glass (US)

Jewellery and ceramics were most consistently identified as being particularly robust craft media the United States and the United Kingdom at present. In the United States in recent years, glass has been tremendously strong and appears to continue to represent a strong export market for Canadians.

Thematic niches within each geographic area or craft discipline are seemingly infinite. Given the time limitations of the study, only two of the more promising themes identified in Phase One of the study could be explored in greater detail. They are:

Specialty Niches:

- Priority Speciality Niche One: Judaica (US)
- Priority Specialty Niche Two: Traditional Western Crafts (US)

Each of these five niches will be discussed in detail in Section 4 of this report.

Our research also suggests that other craft media or product types have potential for increased export sales, including:

- ***Weaving/fibre:*** wearable as well as wall or three-dimensional weaving/fibre/textiles were mentioned in interviews as a previously under-represented area that is showing definite signs of growth.

- ***Wood turning and furniture***: while it was often noted that wood turning and furniture do not have the same prominence in the market as they may have had 10-20 years ago, this media is still a major part of many multi-discipline galleries. The enormous interest in home decorating, which is reflected in numerous decorating shows on television and decorating magazines across North America, is having a positive impact on the demand for fine furniture. For new collectors entering the market at a time when glass prices are already high, woodturning is increasingly appearing to be a more viable option.

- ***Lighting:*** again fuelled by the surge of interest in home décor, demand for unique, hand-made lighting appears to be gaining ground.

- ***Art dolls***: this thematic niche appears to be experiencing popularity with both audiences and artists as hobbyists take on this area with a more professional outlook.

- ***Metal***: as a category, metal is treated for the most part under jewellery in this study. Blacksmithing is not at the level of the major media in general, but might have been underrepresented in this study, perhaps similar to furniture, because it is often sold as a commission without the intermediacy of the gallery, which was our major source of information.

Unfortunately, it was not possible within the short timeframe of this study to examine each of these niches in greater depth. However, these niches are ones to watch for and explore in the future.

4. ANALYSIS OF PRIORITY NICHE MARKETS

As indicated above, our research suggested that certain geographic, media-based and thematic niche markets represent greater growth potential for Canadian craftspeople. The following section of the report explores each of these niches in greater depth.

4.1 United States

The state of the American economy naturally impacts the general market for fine craft in the United States. The dot-com bust of the late 1990s and early 2000s, and the events of September 11th, 2001 delivered staggering blows to the American economy. As a result of this economic downturn, the demand for craft in the United States weakened during the early years of the 21st century. In the last several years, the economic climate has been showing some signs of recovery, although the picture overall remains somewhat uncertain. In tandem with general economic trends, the market for fine craft has been strengthening, although it is still not at the levels it had reached 10 years ago. Despite this restrained economic picture, the United States still represents the export market with the single greatest growth potential for the export of Canadian craft.

4.1.1 Regional Opportunities

While it was not possible during the course of this study to undertake a detailed analysis of craft sales within the United States by region or state, an examination of other indicators of regional craft activity provides a general indication of regional strengths within the US market. These indicators include:

- Location of the top 25 arts fairs and festivals in the US[19]
- Location of the top arts destinations in the US[20]
- Location of the top 100 craft retailers in the US[21]

In order to understand these regional variations, the consultants conducted an analysis of these three indicators using the following generally recognized regional divisions:

[19] according to American Style Magazine, 2004
[20] American Style magazine, 2004
[21] as polled by Niche Magazine, 2004

Northeast[22]	Southeast	Midwest	Southwest	Western	Pacific
Connecticut	Alabama	Illinois	Arizona	Colorado	Alaska
Delaware	Arkansas	Indiana	New Mexico	Idaho	California
Maine	Florida	Iowa	Oklahoma	Montana	Hawaii
Maryland	Georgia	Kansas	Texas	Nevada	Oregon
Massachusetts	Kentucky	Michigan		Utah	Washington
New Hampshire	Louisiana	Minnesota		Wyoming	
New Jersey	Mississippi	Missouri			
New York	N. Carolina	Nebraska			
Pennsylvania	S. Carolina	N. Dakota			
Rhode Island	Tennessee	S. Dakota			
Vermont	Virginia	Wisconsin			
	W. Virginia	Ohio			

The following chart provides a summary of this regional analysis of the density of craft activity in the United States.

Density of Arts/Craft Activity in the United States[23]

Region	# of Top 25 Arts Festivals (2004)	# of Top Arts Destinations (2004)	# of Top Craft Retailers (2004)	Total
Northeast	11	8	41	**60**
Southeast	6	6	24	**36**
Midwest	4	3	13	**20**
Southwest	3	5	11	**19**
Western	3	3	8	**14**
Pacific	3	0	3	**6**

On the basis of this simple analysis, it is clear that the Northeastern United States is by far the most robust market for arts/craft. This conclusion is supported by consultations with leaders in the American galleries, collector groups, craft show organizers and professional organizations, who consider the Northeast to be the most visible and sophisticated market in the United States for fine craft, with a particularly concentration of high end galleries in New York City.

[22] For the purposes of this discussion, Washington, DC has been included in the Northeast Region
[23]

The Southeast region, though well behind the Northeastern region, nonetheless has demonstrated strong craft activity. The Southwest, while well behind the North and Southeast in this analysis, nonetheless represents a strong market when taking into account the small number of states in this region compared to other regions.

The Pacific region, while small overall, includes a wealthy buyers market located in Southern California. The Seattle market is the most prominent in the Northwest. While this market was quite seriously affected by the "dot com" bust of 2000, the city is rebounding and still maintains a relatively affluent collector base. A relatively small market compared to the Northeast, the Northwest is generally considered to have a high level of awareness and appreciation of fine craft. [24]

Finally the Western market, while not large, holds potential for certain types of craft products, such as Western-themed craft. Region-specific demand for certain craft media and themes will be discussed in greater depth in section 4.1.2.

4.1.2 Priority Niche Opportunities in the United States

4.1.2.1 Art Jewellery

Defining the Niche

Art jewellery as a product can be difficult to define. The national collector group in the United States, Art Jewellery Forum, offers some suggested characteristics of art jewellery:

- A conceptual design that 'says more' than a more traditional piece of jewellery;
- A generally contemporary design that does not necessarily exclude tradition;
- The exclusion, although not categorical, of precious stones;
- May be difficult to be worn either by size/structure of the piece or by challenging imagery;
- May be artistically displayed when not worn.

The Society of North American Goldsmiths, while it does not officially segregate jewellery into different sectors, does observe that there is a differentiation between art jewellery and other jewellery forms. Art jewellery is more conceptually driven, more acutely designed and can be in some cases significantly more expensive than more traditionally designed jewellery. Quality and uniqueness are key attributes of the most successful work.

[24] "Northwest Craft Market Study- An Exploration of the Northwest Market for Canadian Crafts" prepared for the Department of Foreign Affairs and International Trade in co-operation with the Canadian Consulate General's Office in Seattle by Miriam Works, Works Arts Marketing, Bellevue, WA

These characteristics may be found to varying degrees according to price point; for instance, pieces that cost only a few hundred dollars and are limited production items are still considered to be art jewellery by gallery owners since they exhibit artistic qualities beyond that associated with traditional jewellery.

Nature of the Market

In recent years, jewellery has been noted as one of the hottest sellers in fine craft.[25] During the course of key informant interviews for this study, the medium that was most consistently mentioned as representing a strong market and having growth potential was jewellery.

The high-end handcrafted jewellery market can be thought of as having two distinct segments: conceptually driven art jewellery and jewellery which has a more traditional and functional focus. Both segments are reported to be growing with the traditional component excelling and art jewellery still growing, but more slowly, in popularity.

The Society of North American Goldsmiths (SNAG) reports that membership in that organization (of which approximately 75% are jewellers) has grown by 30% in the past five years to around 3300 members. While it is difficult to assess how much of the growth in membership is attributable to each segment of the high-end market, one can draw the conclusion that this increase in membership further demonstrates the current strength of the market for handmade jewellery.

The traditional handmade jewellery market, particularly rings, has benefited greatly from the ever-increasing bridal or commitment ceremony market. Many artists are approached to update an older wedding band with a more contemporary style or incorporating heirlooms in the design. Buyers are increasingly looking for unique hand-made pieces that are tailored to their design ideals. Durability and comfort are also key components in this market.

The art jewellery market operates much differently from a more traditional craft market in that ‘wear-ability’ is only one factor influencing the decision to purchase. The concept or artistic statement of the piece is paramount, particularly as the price point increases. The inclusion of gems and precious metals is less important than the statement made by the piece. These factors can make the collection process complex, as one will generally assess the piece on artistic rather than fashion or ‘wear-ability’ criteria. The natural advantages that jewellery may have over other fine craft forms, in terms of wide acceptance and mass ability for public display, are not as evident in the art jewellery segment of the market. However, the serious collector market looks predominantly to the art jewellery segment for building collections, both for occasional wear and display.

[25] *Hand crafted art speaks to new American ideals*, Lisa Crawford Watson, in **Art Business News**, Dec. 2002.

Gallery interviews indicate that sales of art jewellery have grown steadily over the last several years. The challenging nature of the work has made growth in this segment of the jewellery market slower than others in years past, but focussed advocacy efforts of recent years have brought a new awareness and appreciation of art jewellery to a larger market. Many galleries noted the rise of art jewellery from relative obscurity fifteen years ago to a much more prominent and accepted place in the fine craft market today. Nonetheless, growing an active collector base remains an ongoing challenge for many galleries. The Art Jewellery Forum reports recent slow growth in membership enrolment, but is actively advocating for art jewellery through lectures, buying trips, and grants to artists.

Geographically, demand for art jewellery may be stronger in urban markets, particularly in cities that are more on the cutting edge of creative output or acceptance. These markets include not just the East Coast, generally accepted as an established market for all forms of fine craft, but also Seattle, Portland, Atlanta and Dallas. The North West Coast, which was once characterized as an 'art jewellery Mecca', suffered deeply during the dot-com bust of 2000 and has only recently started to rebound. Smaller regions such as Tucson, Arizona and Louisville, Kentucky have art jewellery galleries that are operating in a more price sensitive and less 'conceptual' environment than exists in larger markets.

Art jewellery galleries tend to offer a wide range of prices. Limited production work, still considered sufficiently artistically challenging to be considered art jewellery, can range in the area of a few hundred to the low thousands in dollars. More challenging and one of a kind work ranges from the low thousands to around $9000 at the higher end. It was reported that prices rarely exceed $10,000, except for those works of a few exceptional artists or when gemstones are included in the work. Galleries report a "bread and butter" line of $200-$600 for the less active collector, while higher priced items in many cases are also selling very well.

The vast majority of collectors of art jewellery are reported to be women. Men who collect often do so as gifts for women. In contrast to other craft media, it is rare for men identify as a collectors of jewellery on their own or with their wives as a "collector couples". However, industry interviews suggest that more men are slowly starting to wear and collect art jewellery.

Other typical characteristics/behaviours of art jewellery collectors include:

- Reluctance to self-identify: More so than in other media, it appears that collectors of art jewellery do not as readily self-identify as collectors, rather seeing themselves as simply having a natural interest in jewellery. As such they may be more reticent to be "cultivated" in the ways that collectors in other fine craft media are.

- Varying degrees of disposable income: Those with little disposable income may save for just one piece but consider themselves a collector based on their appreciation of the art form.

- Individuality and connection: Most often purchases are made based largely on a personal connection to the piece. Wearing art jewellery becomes a statement of individuality for many.

- Connection to local market: Art jewellery galleries report a more localized or national collector base than do other high-end galleries that feel they serve a global market.

Fashion trends play a much larger role in the traditional jewellery market; however, some trends do carry over into art jewellery, particularly at the lower price points. For instance, the focus on "big" in the fashion jewellery world has contributed in a limited way to some recently produced art jewellery work.

Overall, while there are some conflicting signs in the marketplace, it appears that art jewellery is a growing market, possibly experiencing growing pains, with potential for expansion as awareness and acceptance of the art form continues to develop.

Reaching the Market

- *The Art Jewellery Forum:* As previously noted, the AJF as the only national organization of art jewellery collectors has a very active advocacy role. It has been characterized as a fairly small yet active and passionate group that has benefited the art jewellery market greatly through its efforts. Since its inception, awareness of and appreciation for art jewellery seems to have grown significantly, according to some gallery owners, particularly those in larger centres. While it may be difficult to reach this group directly, members are actively seeking out pieces through galleries and attending events such as SOFA.

- *Galleries*: There are still relatively few art jewellery galleries in the country when compared to other media, offering artists a limited choice of high-end outlets for their work. However, the gallery system is still the key source for high-end art jewellery. Gallery owners are looked to for advice on collections. Many owners are proactive in contacting collectors with information on new inventory or sending pieces on approval. Gallery owners are also proactive in cultivating collectors through lectures, exhibits, and various networking opportunities. Information is made readily available on the artists and on the collection process.

Galleries report that their choice to accept an artist ultimately is based on a 'gut' feeling or personal draw to the work. Artists most often come to their attention through word of mouth, particularly from other artists. Others review portfolios at the annual SNAG conference. There are varying reports of success with unsolicited portfolios. Some galleries report rarely accepting work this way unless it "knocks their socks off". Others, particularly in smaller regions, do accept on the basis of well-presented portfolios.

- *SOFA*: The annual SOFA exhibition, particularly the Chicago show, represents a significant opportunity for collectors seeking the best in art jewellery. While SOFA does attract the most serious and wealthy collectors, there are also many mid-range collectors who attend, feel quite welcome there, and find work in their price range. The Society for North American Goldsmiths (SNAG) maintains a presence at SOFA every year. Lectures on art jewellery have been part of the SOFA program in past years. It is worth noting that some galleries, particularly on the West Coast, expressed reluctance to attend SOFA, stating that the cost was not worth the benefit.

- *Retail/Wholesale Shows*: Retail and wholesale craft fairs and gift shows represent a significant opportunity for some high-end jewellery makers that produce more traditional work. One such artist reported that sales doubled recently at the New York Gift Show, representing her largest single source of revenue. Some artists have had a high level of success at making direct sales as well as networking and attracting attention from key members of the industry such as national catalogues. These forms of jewellery are often wholesaled to antique stores, higher-end clothing/giftware stores and some galleries.

  Art jewelers have more limited success at these shows. Art jewellery collectors report little success in locating new and exciting work at the standard fairs and shows. Numerous jewelers attend, but very few fall under the higher end art jewellery category. However, collectors still do attend these shows on occasion and may provide artists a networking opportunity if not immediate sales. And as gallery opportunities are still somewhat limited, attendance at these shows has become more important. Some artists have added production lines into their product mix to help support the one-of-a-kind work, perhaps as a reflection of the type of work demanded at most retail and wholesale craft shows.

- *SNAG*: The Annual SNAG conference attracts 700 to 800 attendees each year; while collectors represent a very small number of these participants, gallery owners attend and may review artist portfolios.

Access to Market for Canadian Artists

As in the case of other craft media, Canadian art jewellers currently have a low profile in the United States. The general perception of Canadian art jewellery is that it is likely as diverse as American work and may have similar quality; however, it is largely unknown.

Nevertheless, our research indicates that there is an openness to the work of non-American art jewellers. In fact, there appears to be a growing interest in international artists, as evidenced by the attendance of American art jewellery collectors at the recent COLLECT show in London. All galleries interviewed carry international artists to varying extents and most currently carry a limited number of Canadian artists.

Customs issues, however, remain a major barrier to entry in the US market. It was reported that criteria for jewellery are particularly difficult and that galleries sometimes require that artists take on full responsibility for all border issues to avoid taking on those burdens themselves.

Overall Assessment of the Jewellery Market in the US

All signs point to a flourishing market for traditional handcrafted jewellery. While there may be many entering this market, those that provide a unique quality product that resonates with buyers will have the most success. As one jewellery artist remarked, understanding trends and what the market wants is key to having a successful product line. The lowest end is not necessarily the most successful; more expensive pieces, particularly rings, seem to be faring well in the marketplace.

Our research suggests that it has taken a considerable period of time to cultivate interest in and awareness of art jewellery beyond a relatively small group of devoted fans. While traditional forms of jewellery have an obvious following, the more conceptual art jewellery has mystified potential buyers in terms of how to wear it or display it. Art jewellery also seems to occupy a place between art and fashion in the minds of those unfamiliar with the form, leaving it hard to characterize and define. However, there have been recent gains in the market that are giving many a sense of optimism for the future.

4.1.2.2 Ceramics

Size and Nature of Market

Ceramics was probably one of the earliest craft media to be recognized and developed as a contemporary art form and is perhaps the most well established media based art form in the USA, having been recognized as such since the late 19th century. For these reasons also, stratification of the market has taken place and new works may be bought for anywhere from $10 to $50,000 in a few cases. Limited production of functional ware maintains a following, and there are a number of galleries that are dedicated or mostly dedicated to showing work in clay which is non-functional and which refers and contributes to the latest artistic discourses.

As a result, public collections usually contain some examples of ceramic works from at least the early 20th century and later, providing evidence of a century of collecting and a reference point for contemporary collectors. Many colleges and universities have well established ceramics departments, whose graduates then supplied the market. As a consequence, there is a broad market in this medium at all price points. Sales concentrations were often identified as being around those areas where post secondary institutions had created a supply, underlining the point that ceramics is one of the most soundly rooted of craft media in the economy as a whole. Whistler, the painter, popularized the collection of oriental ceramics in the 19th century and the origins of the interest in contemporary ceramics are based in part on the well–established prior practice of collecting oriental ceramics.

Almost all the galleries, other than specialty galleries, contacted during the course of our research sell ceramics. Numerous respondents named ceramics as being among the best sellers by medium. There are a number of galleries, such as the Garth Clark Gallery (in NY city and Long Island City), which bills itself as "The Leading Gallery for Ceramic Art," the Parrasch Gallery, and the Frank Lloyd Gallery, that specialize mainly in ceramics. This is unusual as most galleries tend to sell a variety of media, and it indicates the advanced evolution of the market.

One gallery contacted during the course of this research which has been in business since the 1960's, specifically noted that a particular ceramist's work has gone from a typical price of $500 to $50,000 in the last 20 years and, although the price of paintings has increased in that time, it has been by a much lower factor. David McFadden, ceramics curator at the American Museum of Art and Design, notes that it is generally believed that ceramics are still undervalued and will continue to appreciate.

Compared to glass, which still is identified by many respondents as a currently "hot" market, ceramics is not perhaps quite so vibrant. However, our research indicates that ceramics sales are growing steadily and reliably, and that collectors are active and their numbers and discrimination are growing.

As with the crafts in general, ceramics still struggle to achieve recognition as an artistic statement at the highest level and commanding the highest prices. This credibility gap is narrowing, however, owing to greater customer education and exposure, the development of critical discourse around the medium, the creation and maintenance of dedicated centres and collections, as well as the steady maintenance of specialized periodicals, most of which are well known to the professional ceramist. This same credibility gap allows many collectors to realise that collection of quality works is possible at an undervalued price. The Friends of Contemporary Ceramics, founded about 10 years ago, has as its purpose the improvement of the standing of ceramics arts and to gain acceptance for them at the same level as fine arts.

Several of those interviewed during the course of this research pointed out that a second generation of American ceramics collectors was emerging or already buying. Linda Schlenger, President of the Friends of Contemporary Ceramics, also pointed out the importance of secondary markets, in other words, the resale of ceramics. In her words, “There is a strong secondary market and there has been for some time. The secondary market is the most important one because anyone can be sold once by a smart dealer, so being re-sold is the test. When people want pieces and can’t get them, then they turn to the secondary market.” The existence of a strong secondary market in ceramics is useful indication of its entrenchment in the collecting scene in the USA.

On a regional basis, our research indicates that the market for ceramics is strong across all parts of the US, but appears to be particularly robust in areas where ceramics teaching institutions are located. Areas which are not usually considered general economic hot spots, such as the Carolinas for instance, have been identified as having good potential for ceramics sales. The South West region, particularly Arizona, has a particularly strong and lively interest in high end ceramics. Several galleries in the area specialize in ceramics or have a focus on the medium. These and the ceramics programs at Arizona State University, including the growing collection at the Gallery and the new Centre for Ceramic Study, have contributed to a lively interest in high-end ceramics in the area. The local demographic includes significant numbers of retired professionals from other parts of the USA and elsewhere. The North Eastern USA has a solidly established interest in ceramics, with major teaching institutions, and a large number of craft outlets.

Other clay-specific centers, such as the Archie Bray Foundation, located in Helena, Montana, are valuable parts of the network, providing opportunities to learn, to teach, and to make contacts.

California was also cited as a place with notable interest in collecting ceramics, stimulated by the explosion in avant-garde practices there in the 1950’s and since. Though having a shorter history of craft activity than the East coast, California is a centre of ceramic activity, with collectors and a dedicated gallery, the Frank Lloyd Gallery, in Los Angeles.

There is general agreement among respondents that the ceramics collector profile is of a mature professional of either gender. One US gallery from the North East stated very firmly that the second generation of collectors has emerged – in many cases literally the children of the earlier generation – and several other galleries echoed this view in the US. The first generation collected out of a need to establish their identity by purchasing; they lacked confidence and tended to stay within their area of collection that they were comfortable with. The second generation is more confident, less concerned to stay within narrow self determined parameters and more likely to buy a piece in a medium which they have not collected before. Possibly as a result, more galleries are displaying paintings together with ceramics than was the case two decades previously.

Collecting organizations include the Renwick Alliance and the Friends of Contemporary Ceramics. These organisations generally do not like to be approached directly, but prefer to take the initiative.

Reaching the Market

The point of entry into the ceramics market in the US depends on the level and kind of work made by the ceramist. The specialized galleries and selling events are so few that many quality ceramists may still prefer to expose their work through generic craft fairs, suitably juried. There are many retail outlets in the USA which may be styled "galleries" but which do not display work individually labeled with titles and artists in curatorially selected exhibitions. Many of these carry quality work and provide an important sales opportunity.

The field is in a state of change, especially with respect to the credibility of ceramics – and crafts generally – in relation to visual arts. Perhaps in response to the developments noted above, two contradictory trends appear: more specialized ceramic galleries and institutions are apparent, which are giving the field the resonance and articulation of its own concerns. At the same time, ceramics are more comfortably and convincingly shown in company of the "higher" arts with less hierarchical distinction being made. Reaching the market is a matter of positioning the work in the most advantageous context – as an art form in a medium with its own heritage and particular concerns, but not exclusively or inflexibly tied to them.

Networking is a particularly important keynote to becoming established in the market, just as it is in Canada. As just one example, most galleries said they found their artists in part as a result of referrals from other artists with whom they already had a relationship. The most common answer to the question "How do you find your artists?" was "Any way I can!" There is no simple single path to accessing the market, nor are there when the producer and the customer are making subjective decisions. While, theoretically, collectors and artists are looking for one another, the real searchers are the collectors. They may not want to be found or to be pestered, but the serious collector is busy keeping a lookout, stalking and making contact with the artist of his or her choice. The individual artist must hone his networking skills, and must work at this aspect of the business. They must work with galleries, other artists, and collectors and build a relationship with them. The artist has to put himself or herself in the right place and they will be noticed. The "right places" include:

- giving and taking classes;
- events such as conferences;
- approaching galleries;
- attending fairs;
- joining professional organisations;
- exhibiting in public galleries;
- coverage in critical periodicals and the general press;
- using the existing infrastructure, such as the SOFA shows and COLLECT in London, which American collectors attend.

Fusion holds an important fair at the CBC Atrium building in Toronto that attracts a number of US collector as well as Canadians. This is a fundraiser for Fusion and is in its 9th year. It could be built on, possibly on the model of Collect, in partnership with an important institution.

Building public collections is a key factor to developing recognition of value. Part of the synergy of developing a collectable profile involves public galleries. The "Good Housekeeping Seal of Approval", which acceptance in a public collection confers, is valuable and is noted by collectors. Many public galleries that are committed to ceramics specifically or to crafts generally maintain and augment their collections. They are aggressive about acquisitions, and expect donations of work or arrangements with donors who will buy specific works for the gallery. Cultivating public collections, as well as exhibitions in public galleries is a key element in a strategy for an artist and his agents.

Artists at a certain level of attainment may face the need to re-evaluate their involvement in craft fairs. Some respondents said it was important to position themselves in the art market and avoid craft fairs. Others identified fairs as a means of sourcing artists for their gallery.

Accessibility of the Market to Canadians

Except for those galleries and fairs that have a restrictive policy based on the country of residence, many sales venues will accept the work of Canadian ceramic artists. Several do so already in the US. None reported any resistance to Canadians, and all said they would welcome the chance to look at Canadian work. In general, the door is open for Canadians, and there is a slight curiosity factor that is positive.

Many US public institutions would be open to international exhibitions and expressed interest in partnering with, for instance, the Gardiner Museum of Ceramic Art. The resources and readiness of Canadian institutions to enable them to do this were not examined in this study.

Some institutions based in the US are international, such as the American Museum of Art and Design, and certainly collect the work of Canadian artists.

Problems at the border were commonly identified in interviews with those importing ceramics from Canada. This applied not only to entering the US, but also to re-entering Canada with works returned after an exhibition or returned unsold from a gallery. “Free trade doesn’t exist!” was a common remark. Part of the solution is a broker, which in turn adds to the expense. One US gallery in Michigan cited the problem and expense of returning work to Canada as a drawback that would prevent her from developing a larger range of Canadian artists.

Overall Assessment of the Ceramics in the US

The work of a few significant Canadian ceramists is known and highly respected in the US, which primes the pump for others to follow. This has created an important foothold for others to follow. In general, the door is open for further inroads into the US market by Canadians. Market readiness on the part of the artist, adequate gallery and government support are all essential for success.

4.1.2.3 Glass

Nature of the Market

Glass is often seen as one of the highest profile media in the fine craft field. Works by the top glass artists, particularly hot glass, generally command the highest prices of all fine craft works. The research conducted during the course of this study suggests that the market for high-end glass in the United States continues to be robust. While some galleries reported that glass may be a maturing market, sales have not shown any dramatic decreases at this stage and may be characterized as "holding their own." Serious collectors appear to be continuing to buy major glass pieces for their collections. At the same time, it should be noted that while the high-end market appears to remain strong, there are some indications that the mid-range market has been more susceptible to downturns in the economy.

The North-West Coast of the United States has traditionally been a strong area for glass given that many acknowledged masters are from the area, although glass is strong in many other regions in the United States, particularly in high-end galleries in the Northeast.

Collectors

It is generally accepted that Americans are the pre-eminent collectors of glass globally. The sophisticated sphere of the American collector market seems to have an ongoing comfort level with glass as a highly collectable medium. Many galleries reported that the main collector base is wealthy, knowledgeable and has collected for some time. While it was often noted that collectors are generally couples who purchase by mutual decision, a few galleries found that individuals comprise their best market for the most creative pieces. Home décor considerations may play a role in the collector couple's decision to purchase, although it is not the key factor.

It was noted by several galleries consulted during this study that a large segment of the current collector market is an aging one. Those collectors may be reaching the point of having a substantially 'full' collection and are potentially considering donating their works to a museum in the near future. Out of necessity, the next generation of collectors is being cultivated. Younger and less experienced collectors are now showing interest in glass and are buying at an entry-level price range, often in the area of $5000. Galleries are responding by offering a range of prices to better enable the newer collector to enter the market. The Glass Art Society (GAS) has recently placed an emphasis on advocacy in order to educate new collectors currently in the mid-level price range of collecting in recognition of the importance of informing and growing the collector base.

Reaching the Market

Glass is well represented by galleries in the United States, many of which are solely dedicated to glass artists or carry glass as the dominant craft form. For the highest end of the medium, representation by a gallery is a must. As a further reflection of glass' stature in the fine craft field, glass represents the largest media component in the annual SOFA exhibitions. Collector interest in glass continues to be strong at SOFA and at galleries across the United States.

Museums, such as the Corning Museum of Glass and the Museum of Glass in Tacoma are dedicated to exhibiting and collecting glass objects. This brings further prominence to a well-developed fine craft field.

Accessibility of the Market to Canadians

Interviews with various galleries in the United States suggest that American galleries view American glass artists as the generally acknowledged, although not outright, leaders in the global field of glass in terms of conceptual creativity. As is the case with Canadian craftspeople in general, Canadian glass artists appear to lack visibility as whole in the United States, although a number have achieved significant levels of success and prominence in the US. While American glass may be highly regarded in the market, collectors are open to any artist whose work speaks to them and reflects uniqueness, exceptional skill and creativity. Some of our research in fact suggests that there is a degree of appreciation in the US market for the highly individualistic approach of Canadian glass artists, which contrasts to the "school" approach that can exist among American glass artists. This may represent a competitive advantage for Canadian glass artists.

Overall Assessment of the Glass Market in the US

While the perception that Canadian glass does not yet possess the maturity of American glass was frequently expressed during our research, there is also a perception that Canadian glass has the potential for greater sales in the US.[26]

4.1.2.4 Judaic Craft

Niche Definition

Judaica is any object used in the observation of Jewish traditions or Jewish commandments, or objects that reflect Jewish customs, practices or philosophy. Examples of Judaic craft include dreidles, wine cups, mezuzahs, menorahs and prayer shawls.

[26] Interestingly, one barrier to Canadian sales in this market was reported to be prices that are too low relative to other work of the same quality.

Market Trends

Until the early 1980s, demand for Judaica was mainly limited to antiques. However, the combination of a renewed interest in Judaica among Jewish baby boomers in the mid-80s and a limited supply of antique Judaica have led to increased demand for contemporary Judaic crafts.[27]

Marketplace research conducted during the course of this study indicates that the demand for high-end contemporary Judaica continues to be strong. One positive indicator of the demand for good-quality contemporary Judaica is reflected in the introduction within the last two years of specialized Judaica lines by three well-established tableware producers: Spode, Nambe and Mernardaud, makers of Limoge.

Because Jewish holidays and celebrations such as weddings and Bar and Bat Mitzvahs take place throughout the year, demand for Judaica is not limited to a single season, but sells year-round.

Along with the increased demand for Judaica, the market has seen an influx of cheap products manufactured in Asia, which has led to a softening of the market at lower price-points. However, our research indicates that demand for unique, higher-quality, higher-priced Judaica remains strong.

Size/Nature of Potential Market

The United States represents a sizable potential market for the sale of Judaica. According to the Institute of Contemporary Jewry at the Hebrew University of Jerusalem, the Jewish population in the United States, at 5.7 million, is the largest in the world, even exceeding the Jewish population of Israel, at 5.025 million.[28]

Major urban centres with large Jewish communities represent the most logical target markets for the promotion of Canadian-made Judaica.

American Metropolitan Areas with Largest Jewish Populations[29]

Metro Area	Jewish Population	Percent of World Jewish Population
New York[30]	2,051,000	15.4%
Los Angeles	668,000	5.0%

[27] ***Ritual Pursuits***, **American Style Magazine**, Collectors Corner, 2004, www.americanstyle.com and ***Symbols of a Revitalized Market,*** **American Craft**, Kirsten Coughlin, July, 1998.

[28] ***World Jewish Population 2002*, American Jewish Year Book, 102, New York, 2002,** Sergio DellaPergola

[29] ***World Jewish Population 2002*, American Jewish Year Book, 102, New York, 2002,** Sergio DellaPergola

[30] The size of New York's Jewish population is the second largest in the world after Tel Aviv.

Southeast Florida[31]	498,000	3.7%
Philadelphia	285,000	2.1%
Chicago	265,000	2.0%
Boston	254,000	1.9%
San Francisco	218,000	1.6%
Washington	166,000	1.2%
Baltimore	106,000	0.8%
Detroit	103,000	0.8%

Reaching the Market

The main distribution channels for the sale of Judaic craft in the United States include shops at Jewish museums and cultural centres, such as the Jewish Museum Shops in New York, Audrey's Museum Store at the Skirball Cultural Centre in Los Angeles and the Bariff Shop for Judaica at the Spertus Institute of Jewish Studies Museum in Chicago. Our research indicates that visitors to these types of cultural institutions consider giftshop purchases to be a means of supporting the preservation and interpretation of Jewish history and culture. In addition to museum giftshops, Judaica is sold through a range of commercial art galleries, jewellery stores, temples and Jewish community centres.

The Sara Levine Petroff Gallery in Toronto, with a prominent selection of contemporary Judaica, reports significant American interest through the internet and during buyer vacations in Toronto, particularly during times of favourable exchange rates.

Specialized Judaic craft shows are generally small and have a limited reach. However, for the past 12 years, the Bet Am Shalom Synagogue in White Plains, New York has mounted a juried show of contemporary handcrafted Judaica/ ritual items and jewellery. This show is generally considered to be the best of its type in the United States and averages attendance between 1,000 and 1,200 motivated buyers.

Sourcing

Retailers interviewed during the course of this research reported that they source Judaica through a number of major wholesale shows in the United States, such as:

- Buyers Market of American Craft
- Philadelphia Museum of Art Craft Show
- New York International Gift Fair®
- San Francisco International Gift Fair and the California Gift Show®.

[31] Miami-Ft. Lauderdale and West Palm Beach-Boca Raton

- The Museum Store Association holds an annual show at different locations around the country.

Accessibility of Market to Canadian Craftspeople

A number of a leading Judaica shops and other venues reported that they already carry the work of a small number of Canadian craftspeople, although they have found the supply of authentic, high quality Judaica produced in Canada to be somewhat limited at this time. Interviews with show organizers and gallery owners indicate that they are always looking for new, authentic ceremonial objects or fresh, contemporary interpretations of Judaica. Quality work of this type produced by Canadian craftspeople would welcome and would face no disadvantages in the American market based on its county of origin.

As such, while the market for Judaica is a specialized one and therefore relatively small by definition, our research suggests that it represents good potential for increased exports of good quality work by Canadian craftspeople.

4.1.2.5 Traditional Cowboy Arts

Niche Definition

The traditional cowboy arts encompass several craft disciplines, including bit and spur making, saddle making, silversmithing and rawhide braiding. In the past, buyers of these traditional cowboy or western arts were typically working cowboys who were willing to pay significant prices for high quality products that were purchased primarily for their functional purpose.

Size and Nature of Market

In recent years, there has been a marked upswing in interest in Western culture and arts.[32] According to Don Reeves of the National Cowboy and Western Heritage Museum in Oklahoma City, Oklahoma, there are more horses in the United States today than there were 100 years ago and the market for traditional cowboy arts is thriving. A market that was once the domain of working ranchers looking for high quality “gear” has grown into a niche craft market that has increasingly attracted serious collectors willing to pay substantial amounts of money for saddles or spurs that are more likely to end up on display in their houses than on a horse.

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[32] Laura Meyers, T*he American Spirit Lives As Western Art Thrives*, in **Art Business News**, September 2004; Laura Meyers, *Cowboy Art Corrals Collectors: With an Upsurge in the Popularity of Western art, dealers of cowboy paintings, sculptures and collectibles are Roping in Revenues* in **Art Business New***s*, February, 2003

The National Cowboy and Western Heritage Museum has been involved in a partnership with the Traditional Cowboy Arts Association (TCA) for the past nine years. The TCA, whose founding members include Canadians Chuck Stormes and Scott Hardy, was formed in 1998 by a small number of artisans in order to preserve and promote the craft of traditional Western cowboy gear. Many of the TCA members have waiting lists of up to ten years and are no longer accepting orders.

The annual TCA show and sale, which is held at the Museum each September, attracts serious collectors and members of the public who come from across the country for the opportunity to bid on a limited selection of items, 85% to 100% of which sell.

According to Don Reeves, the prices for traditional cowboy arts have doubled in the past five years, with saddles and spurs fetching as much as $45,000 US. While market demand is strong market, there are not large numbers of producers, which suggests there is opportunity for Canadians working in the traditional cowboy arts to expand their sales in the US.

Reaching the Market

In addition to the Traditional Cowboy Arts Association's Annual exhibition, other key distribution channels for traditional cowboy arts include so-called trappings shows, which are held in a number of locations in the Western and Southwestern United States, including Flagstaff Arizona, Elko Nevada and Alpine Texas. These shows celebrate cowboy culture and feature cowboy "trappings," which are collector quality cowboy gear. The most notable of these shows is the Trappings of Texas, held annually at the Museum of the Big Bend in Alpine, Texas. According to Curator Leland Hensley, this is a juried exhibition and sale that attracts entry-level collectors. Prices range from $100 to $12,000. Between 28% and 34% of all pieces in the exhibition sell and overall sales have increased in each of the last two years. The show welcomes submissions from Canadian cowboy craftspeople and in fact, the most recent show included the work of three Canadians.

There are few commercial galleries in the United States that specialize in the sale of traditional cowboy crafts, although there is a well-developed system of public museums devoted to the interpretation of cowboy and western culture, including the National Cowboy and Western Heritage Museum; the Cowboy Artists of American Museum, Kerrville, Texas; and the Museum of the American West, Los Angeles.

Access of Market to Canadians

Interestingly, one might think that being a Canadian would be a major barrier to entering what is arguably the most quintessentially American cultural area -- cowboy culture, but market interviews suggest that this is not a barrier. In fact, the Western United States identifies more closely with Westerners from Canada than with fellow Americans from the East.

In summary, the market for traditional cowboy arts is a highly specialized one and therefore relatively small by definition. However, it is a very wealthy market in which demand is growing and prices are increasing rapidly. Our research suggests that this is a niche market that represents good potential for increased exports by Canadian craftspeople.

4.2 United Kingdom

4.2.1 Defining the Market

Size and Nature of the Market

The Arts and Crafts movement began in the UK as a response to industrialisation and as an early form of consumerism. The country retains a connection to contemporary craft, despite social changes and economic fluctuations. This has been augmented by a respect for design and an appreciation of the value of niche products with high design content. The economy as a whole in the UK is buoyant, disposable income appears to be high and the pound sterling has risen against the US$ and almost all other currencies, including the C$, since September 11, 2001.

A series of studies called Taste Buds by the Arts Council of England, available on its web site, begins by claiming that London is now the second most important city in the art world, after New York. One may argue with the veracity of this claim, but regardless, the aspiration is indicative of the context into which a Canadian artist would be entering.

Sales by media are estimated to be:

- Ceramics: the biggest media seller at approx 1/3 of total sales;
- Jewellery: the next popular with just under 1/3 in total sales;
- Hot glass: less than 10%;
- Wood: above 5%.

Overall sales are estimated to be in excess of £800 million annually.

Trends

The international outlook of the UK craft community is evident in its strategic planning process, which places a strong emphasis on international development, along with regional development. The strategic approach is aimed at increasing and attracting collectors of fine craft from not only the UK but also Europe and the US. . These strategies should take hold in 2005/06, and will develop the UK as a market for international crafts in a way that is competitive with the US, in relation to its size. The UK is also an entry point to the European market and is very close geographically.

The market for objects in the UK is driven partly by design industries. Design is synonymous with smart, exciting and trendy, and the "hot" design market has recently moved away from fashion to interior design to the extent that fashion designers have been designing objects for the interiors market using their brand recognition. This benefits makers of fine objects, such as craftspeople, which fit into interiors. The UK market responds to the idea of high design in general.

London is clearly the most significant market within the UK, particularly for cosmopolitan, cutting edge work. However there is also a movement under way within the arts development community toward regional development in other parts of the UK. The development of regional infrastructure could open up a wider market for Canadian work in the UK beyond the London area. Nevertheless, at present there are very high quality shops and galleries to be found outside the Southeast region both in big cities and in surprisingly small market towns.

Reaching the Market

The UK is dominated by the London market, and information tends to be coordinated by national institutions. The Crafts Council (www.craftscouncil.org.uk) is an important key to the distribution system, and its web site and links are a vital starting point, giving information on major shows, and on regional events and galleries. According to Kirsten Dunne, development officer with the Arts Council of England, there are 512 galleries listed on the Crafts Council's Buyer's Guide. It should be borne in mind that the Crafts Council is in the process of decentralizing and that the various regional offices are worth contacting and exploring. As one example, the West Midlands office identified 13 important sites for that region alone, each of which were portals to several events and opportunities. This region has a population of about 10 million people and is only one of several well-populated regions outside London. These regions may have an emphasis on certain media, based on historical preferences. For instance, Birmingham is a key area in the jewellery and metal trade; Stourbridge is an equivalent centre for glass. Consequently, they both have international media-specific events that would be worth exploring for artists working in those media.
Besides the West Midlands, other regions in England are:

- South West – Cornwall, Devon and the Bristol area
- Yorkshire and the North East
- Manchester and the North West
- Wales and the Welsh border

Eire is prosperous but reported to be inclined to be most actively supportive of work from that country. Scotland is a smaller market than England but is active, has a concern for quality, and responded warmly to the idea of Canadian craft.

4.2.2 Priority Niche Opportunities in the UK Market

4.2.2.1 Ceramics

Niche Definition

Work in clay that is made by hand or substantially by hand for purposes of self expression, more or less avant-garde, is known in the UK as “studio ceramics”. There is also a substantial market for high quality functional work produced by small production facilities and is usually known as “domestic pottery”. Many high-end shops or galleries in the UK will advertise both categories.

Nature of the market

Ceramics has the largest sales of all craft media in the UK, amounting to slightly more than 1/3 of the estimated total for all crafts of over _800 million. Much of what has been said generally of ceramics in the USA can also be said of the same medium in the UK – that making and collecting artists’ work in this medium is probably better established than in any other craft medium; that art school programs have produced high quality graduates since the WW II which has created a supply and lead to increased attention; that public collections including ceramics has given the market credibility; and that the market is said by all respondents to be steady and growing.

The work of early pioneers in studio ceramics, such as Lucy Rie, Hans Coper, and other more recent artists has established a strong secondary market, which prepares the way nicely for later artists to benefit from the confidence this gives investors in the field as a whole.

The influence of COLLECT has been important, and attracts collectors from the USA and Europe as well as from the UK.

Arguably, through the work, authorship and sheer missionary zeal of Bernard Leach, the interest in contemporary ceramics was spread into the US from the UK. However, the USA soon repaid the compliment by making stylistic and other advances that have influenced the UK considerably, and the ceramic community and to some extent, the market has a ready acceptance of North American trends and idioms. Perhaps the British market prefers work that has focussed forms and fine surfaces, rather than the gestural and painterly effects with which some North Americans are comfortable, but this is to generalise. Linda Schlenger, president of The Friends of Contemporary Ceramics, a US based society of collectors which makes trips to the UK in order to buy work, says that perhaps the US collectors have been more ready in the past to buy UK work than the UK collectors have been to buy US work, but that that is now changing. Many respondents told us that UK collectors are more international in their outlook than ever before.

Optimism for the future of the medium was high all over the country, with sales solidly established and expectations of growth, especially in the studio ceramics category.

Reaching the Market

Despite the popularity and strength of the ceramic market in the UK, medium-specific sales events are harder to find for ceramics than for jewellery, for example. Whether this is because the relationship to the medium-based manufacturing industry is different in each case, or whether the ceramicists are already so well served by the generic craft events and the high end shops and galleries is hard to say. Also, the vast majority of ceramists in the UK sell from their studios and have open studio events, combined with others in the area, or singly. However, market penetration should be possible with the proper research and preparation. As with any other medium, a personal visit based on research is important.

Canadians considering entering the UK market should look closely at the two main London events, COLLECT (February), and the CHELSEA CRAFT FAIR (October). These are the highest echelon events, attracting the trade and retail customers and are essential for developing a profile as well as making actual sales. Around 90% of exhibitors at COLLECT said they met new customers at the show.

Despite the dominance of the London area in the market, the UK has a number of good quality shops and galleries in surprisingly rural areas. Improved transportation and the short distances have allowed wealthy customers to move out from London and live in more picturesque surroundings, thereby building local markets for advanced work. All of the respondents from outside London said that about 50% of their trade was local, and that the rest was from people around the country, including London collectors. Searching the market should include looking at the gallery advertisements in appropriate periodicals, including Crafts, and Ceramic Review.

Of the 26 galleries listed in the Independent Craft Galleries Association web site (www.icga.org.uk), 23 list “studio ceramics” and 16 list “domestic pottery”. Many list both. Gallery Besson in London specializes in international ceramics.

Various trade shows, such as the Spring Fair at the national Exhibition Centre in Birmingham in February (www.springfair.com) have separate sections for craft media, (like the Toronto Gift Show) but each artist will have to consider if the level of work suits their product. Potfest (www.potfest.co.uk) has several regional shows of ceramics that include some foreign, mostly European, artists.

Canada House organizes some exhibitions and is prepared to consider proposals, preferably from organizations of galleries. Exhibitions at public spaces are another way to attract notice.

Accessibility to Canadians

All respondents, except one that had a policy of UK-only crafts, said they would be pleased to look at Canadian proposals, and the one with the exclusive policy was considering changing it. Canadian craft has no profile in the UK, but the idea of Canada is positive. Canadian identity is no barrier in itself to success in the UK, and is really not very relevant.

Overall Assessment of the UK Ceramics Market

In general, the ceramic field in the UK is a competitive one, but there are locations around the country that would be suitable for consideration and approach. As with all media, London and the South East provide the largest market and one that is most likely to be open to avant-garde and the most innovative work. Approaching private galleries would be worthwhile. Everywhere, the quality of the work was cited as the key criterion. After researching the market, a personal trip to reconnoitre is recommended by most respondents.

4.2.2.2 Jewellery

Defining the niche

The UK has a long history of jewellery making and manufacture, arising out of the medieval and industrial traditions. The practices are therefore noticeably stratified. There are three main sub groups:

- Art jewellery- unique, one of a kind, makes personal artistic statement. Within this category, there are sub-categories: one tends to be avant-garde and with less emphasis on wearability; the other is slightly more conventional and may place more emphasis on wearability, and on precious materials.

- Designer/maker- which has some elements of production/limited production as well as artistry but from a design view
- Industry- huge industries in UK, known as “trade” or “High Street” jewellery.

This study is principally concerned with the first category with some implications for the second.

Size and Nature of the Market

Jewellery is the second most popular craft medium in the UK. Out of total sales of crafts in the UK of more than _800 million, sales of jewellery are just under 1/3 of the total.

Optimism is high. The connection to apparel and the fashion industry is strong and gives vibrancy and a sense of style that appeals to both urban and rural people.

The sheer size of the industry may intimidate at first: 700 jewellery students are enrolled in the jewellery programs in Birmingham; 13 million hallmarks are processed annually at the biggest of four assay offices. However, this size and the consequent marketing opportunities may also provide useful niches for the Canadian craft jeweller.

Several galleries specializing in crafted jewellery, of which three are outside London, suggests a degree of healthy specialization in the market.

Men and women buy differently, with women predominantly buying for themselves throughout the year. Men are good customers at Christmas. Weddings and engagements provide the biggest and steadiest markets. Buying as gifts is common, and the majority of pieces are expected to be wearable.

Most buyers of jewellery do not appear to consider themselves collectors, although they may buy several pieces from the same jeweller, or they may have an interest in jewellery. A generalized difference was revealed between buyers of jewellery and of ceramics, where the ceramic buyer may consider himself or herself to be a collector, and may see their cumulative purchases in perspective and seek to balance it or acquire the work of an artist mainly because they think it is important. Jewellery is often bought in relation to ideas of personal adornment, status, and portable value.

Respondents reported price points commonly from _30 to _5000, even in the regional markets, and with even higher prices occasionally and more commonly in London.

While there is little knowledge of Canadian jewellery as with other media, there is no resistance either. As one respondent said, “Canadian crafts are looked at mainly in terms of itself rather than where it’s from. For the audience, it is not perhaps one of the initial questions which is maybe asked, but more concern is concentrated on the complexities of materials, techniques, and design innovation and what reactions are felt towards the work.”

Along with other applied arts media in the UK, optimism for the future is high. London and the South East are considered larger and more “cosmopolitan” and more likely to accept international or avant-garde work. However, galleries specializing in jewellery from outside London, such as in York, in Hereford and in Cheltenham, are also listed in the Independent Craft Galleries Association web site.

Galleries regard their product as distinct from the “High Street” and “trade” jeweller and feel that their customers can distinguish between them. A crisis a few years ago in the “High Street” trade caused the market to lose faith in the quality of trade jewellery and an increased interest in alternative sources. With more manufacturing moving to the Far East, the mass production trade was being affected and consumers were reported to be getting more appreciative of the individual characteristics available to them from hand made work.

Respondents agreed with the general trend of increased internationalization, which could open the door to Canadians, and all mentioned the European, particularly the German, influence on style and design was becoming stronger.

All felt optimistic about the future, that there are more international exhibitors than there used to be, and there is more cross-fertilisation of ideas than before.

Reaching the Market

As with other media, pursuing a jewellery market in the UK requires research to determine the particular stratum that is most suitable. Networking is important. A synergy involving galleries, generic crafts fairs and specialised media fairs is probably required. Many very large trade fairs, which would seem at first sight not to be of interest, have special niches within the show for small production jewellery and were cited by galleries responding to the survey as places where they source their artists. The web sites of many of these large organizations have useful links, newsletters, market information and services that serve the fine craftsperson in business. Most galleries would agree to be approached directly by the artist in the usual ways. Some galleries and events are restricted to UK residents but many are not. Even those which are restricted are worth visiting for purposes of networking and assessing the competition and the state of the market

Perhaps because of the size of the trade as a whole in Britain, there are several generic events that should be investigated, as well as several media specific events with market depth. All respondents mentioned the Chelsea Craft Fair (October, retail) and the British Craft Trade Fair in Harrogate in April. Many mentioned the Spring fair at the National Exhibition Centre outside Birmingham in February. Other mentions included the International watch and Jewellery Fair. The fair at the Goldsmith's Hall in London is an important retail event. *Dazzle* is a series of traveling, selling exhibitions with an international component.

Galleries can be found from the British Crafts Council's web site and from the Independent Craft Galleries site.

Jewellers planning to use precious metals should be aware of the requirements of the Hallmarking Act in the UK. Basically, this makes it unlawful to claim that an article contains gold, silver or platinum without a hallmark. Such articles may be sold without a hallmark, but no claim may be made as to their content in this respect. The Assay Office (there are four of them, in Birmingham, Edinburgh, London, and Sheffield) now provides services beyond the statutory requirements and offers specialist advice, expertise and analytical services.

Jewellers considering the UK market should research accordingly and plan to visit in person to make contacts and assess the situation.

Accessibility to Canadians

Most galleries indicated a willingness to receive proposals from Canadians. There is no resistance to Canadians, but the strong European influence and styles at present might be a factor to address, depending on the stylistic preferences of the individual Canadian artist. Quality of the work is the main concern.

Because of the lack of familiarity in doing business with Canadians, it is probably useful for the Canadian artist to be able to address the practical matters of importation. Jewellers planning to use precious metals should be aware of the requirements of the Hallmarking Act in the UK. Basically, this makes it unlawful to claim that an article contains gold, silver or platinum without a hallmark. Such articles may be sold without a hallmark, but no claim may be made as to their content in this respect. The Assay Office (there are four of them, in Birmingham, Edinburgh, London, and Sheffield) now provides services beyond the statutory requirements and offers specialist advice, expertise and analytical services. Note: All the galleries contacted specified that some of their jewellery stock included non-precious materials, such as plastics.

Overall Assessment of the UK Jewellery Market

Despite the competition, the Canadian jeweller will find a ready and growing market in the UK, with several dedicated galleries, and a variety of venues, from "trade" to "craft", open to international artists. Presently, there is a European influence in the market. While there are few customers who regard themselves as collectors, the pattern of purchasing expensive one of a kind jewellery is well established and growing stronger. After researching the market, a personal trip to reconnoitre is recommended by most respondents.

5. DEVELOPMENT STRATEGIES

While this research has confirmed that there is potential to expand the export of Canadian fine craft to a number of niche markets, realizing this potential will require an integrated series of development strategies, involving government agencies, provincial craft councils, other arts agencies, institutions, professional organizations and private galleries. As one leading event organizer noted, there must be a "carefully thought out plan" for promotion of artists; one "can't count on any one thing" to ensure success. The following is a preliminary list of elements in a strategy that we believe are essential to realizing this niche market potential.

- **Creation of a National craft web portal**

Many foreign respondents asked where they could see quality Canadian crafts. A national web portal with links to provincial crafts councils, institutions and events, properly maintained and well designed, could provide this connection and support export endeavours.

- **Consistent National presence at major events in key markets**

Developing a consistent presence internationally would ensure that collectors are exposed to quality Canadian crafts.

As the acknowledged key event for high-end collectors in the United States, SOFA must be considered as part of a major development strategy. Several countries have had a consistently visible and growing presence at SOFA for several years that has paid off for their artists. Many gallery owners noted the visibility of certain countries, such as Denmark and Australia, which led to significant interest and ongoing relationships with those galleries. Of note is the fact that now approximately one-third of all exhibitors are international; that number has climbed steadily since the inception of SOFA twelve years ago.

It was noted by many, including the producer of SOFA, that participating countries should attend for a number of consecutive years in order to make an effective impact on the market. Collectors often want to become familiar with an artist before purchasing. SOFA is a large show with many exhibitors; collectors will naturally gravitate to the familiar. Participants should expect to "make no money in the first year, break-even the second and start to make money in the third year."

A similar philosophy should apply to key UK events such as COLLECT.

- **Government Assistance for individual craftspeople, galleries, associations and consortia for export purposes**

Serious export projects require an investment over several years. Policies should consider that there is a mix of individuals and organizations that all require support to succeed in the international fine craft market.

Assistance should recognize the need for several phases in exporting, including: market reconnaissance where artists pay a visit to the targeted country; active sales ventures over repeated years; and the need for continuous professional networking in a field where networking plays such a critical role in sourcing work.

Some valuable assistance is available at the provincial level. However, coordination between provinces and at the national level is critical to cost-effective international marketing in this field where a suitable consortium of Canadian artists who are competitive internationally may have to be found from several provinces. Individualized business, marketing plans, and demonstrated market readiness will be needed by craftspeople for international projects.

- **Partnering among existing craft institutions**

Partnering arrangements with institutions such as the Gardner Museum of Ceramic Arts, the Canadian Clay and Glass Museum, crafts councils and recognized membership organizations on foreign programs leading to export, should be encouraged and, where necessary, the creation of funding programs to enable this should be considered. Such partnering takes place in the UK, between the Victoria and Albert Museum and the British Crafts Council in the presentation of COLLECT. This event has attracted considerable interest in the press and raised the profile of the crafts field. Events could include reciprocal exhibitions with foreign institutions, collectors' events and sales opportunities.

- **Support for commercial galleries**

An issue frequently raised in both Canadian and American interviews was the need to support commercial galleries in Canada in order to increase the visibility of Canadian artists. It is clear from this study that one of the main components sufficiently lacking in Canada but active in the USA and the UK is the existence of a large network of viable commercial galleries handling crafts.

American and UK galleries often engage in inter-gallery dealing; therefore these galleries look to Canadian galleries to bring Canadian work to their attention, particularly through attendance at major events such as SOFA and COLLECT.

These galleries are the critical entrepreneurs in the distribution system, using capital investment and their own professional judgment in the selection of artists and works. The galleries present and promote their artists nationally and internationally by building an audience for such work. The long-term nature of this activity requires investment. Though private businesses, they are similar in operation and function to book publishers, which are supported by Canadian and provincial governments all across the country. It is fair to say that, just as the literary arts cannot function in the world as it is today without publishers, so too the fine crafts cannot flourish without galleries. Consideration should be given to developing this aspect of the Canadian craft infrastructure, and on developing a Canadian model based on practices in other countries. For instance, in the UK, the Arts Council of England provides a credit program through recognized galleries to enable buyers to make a purchase of an art or craft work by a series of regular payments.

- **Domestic infrastructure (National craft collecting strategy, major museums, craft magazine)**

The lack of ongoing curated exhibits and collections of fine craft and the apparent lack of interest in or knowledge of fine craft at public institutions was noted by several artists and galleries in Canada as a key detriment to the promotion of Canadian work. Collections at public institutions add important credence to the reputation of the artist. Foreign and domestic collectors visit public institutions as well as private galleries in Canada when seeking out works; the absence of Canadian craft would then be noted and possibly felt to be a reflection on the lack of quality of Canadian work. Some respondents suggested reviewing public funding policies in order to encourage more frequent exhibition of fine craft at public institutions across the country.

Canadian respondents generally agree that some aspects of the national infrastructure necessary to provide a platform for international market readiness and export are in place, but under-resourced. Provincial crafts councils are all in place and provide a framework for national initiatives, but they report insufficient resources to engage in extra-provincial projects. The national organization is not resourced to do more than meet semi-annually. Although there are several fine provincial magazines, there is no national magazine and no national critical debate. The issue of national coordination is an issue needing attention if a nationally coordinated export initiative is to get off the ground.

- **Border issues**

Many respondents reported difficulties with goods crossing the border. Many of these difficulties were not explained by increased security concerns today, and Canadian authorities caused many of the problems. Fragile art works unpacked and carelessly replaced, causing breakage, and the cost of returning works on exhibit or unsold to Canada were cited. Some problems were related to goods classification. A review of the place of fine crafts in NAFTA classifications could be usefully undertaken and either clarified or made more consistent.

- **Increased accessibility to and promotion of available resources**

Many Canadian artists interviewed expressed some frustration at the lack of resources or guidance available to them. While many were supportive of the efforts of their local craft councils, they expressed the need for more detailed and readily available information on issues such as exporting and border crossing. The comprehensive “Marketing Guide for Fine Contemporary Craft in the United States” is a valuable asset that could assist many craftspeople with their questions, but its existence does not seem to be widely known. This report should be readily accessible and promoted to a wide craft audience.

The services of Canadian consulates seem to be an under-utilized resource in the craft community and should be more widely promoted. Trade Commissioners and Cultural Officers noted that those in the craft community might more actively seek their services. Since consulate employees have many Canadian business initiatives in their area of responsibility, working with craft often becomes a reactive effort rather than a proactive one. It is then up to craftspeople to contact their consulate in various markets to assist with market research and networking opportunities.

- **A ‘two tier” approach to fine craft strategy**

The segments of the fine craft market must be distinguished from one another for any export strategy to be optimally effective. The high-end marketplace clearly distinguishes itself from the production or even limited production end of the spectrum. Reputation and quality are paramount to these collectors. Conversely, the production craft buying public has little interest, financially or otherwise, in conceptual or sculptural pieces. As one American gallery owner stated, “to be most effective, the Canadian government must create two marketing tiers, one for fine craft and one for the more traditional area”. Any blurring of the lines between the two segments or attempts to promote through similar channels may not result in acceptance of either in the marketplace.

- **Study of international success stories**

The initiatives of several countries were noted as particularly successful or interesting models for Canada to review as it looks to establish more visibility for craft artists in a global setting. While this study was not able to review these initiatives in detail, it is worth noting them for future study by those looking to set policy:

- Denmark's consistent presence at SOFA and overall concerted efforts on behalf of its artists was often noted as a successful example of generating international interest in domestic craft artists.
- Australia is also frequently noted as a country that has successfully promoted its artists onto the world stage.
- Recent efforts by the Crafts Council of Ireland include bringing together an international panel of fine craft experts to select a body of work for SOFA 2006 and a focus on bringing international expertise and exhibitions to the country as a means of creating ties to a global market.
- As indicated in the body of this study, the UK is proceeding with an active and nationally coordinated strategy to develop a bigger collector's market, and probably to spread regional development more evenly across the country.

6. APPENDICES

Appendix One: TTC-CGS Working Group for Crafts

(Trade Team Canada Cultural Goods and Services)

Chair:

Tom McFall, Executive Director
Alberta Craft Council

Secretariat:

Mesmin Pierre, Manager, Cultural Trade Development Unit
Trade and Investment Development Directorate
Department of Canadian Heritage

Members:

Charles Lewton-Brain, President
Canadian Crafts Federation

Serge Demers, Executive Director
Conseil des métiers d'art du Québec

Louise Chapados, Director of Services and Exports
Conseil des métiers d'art du Québec

Anne Manuel, Executive Director
Craft Council of Newfoundland and Labrador

Robin Mader, Trade Commissioner
Arts and Cultural Industries Promotion Division
Foreign Affairs Canada

Susan Hanrahan, Executive Director
Nova Scotia Designer Craft Council

Sandra Grismer, Executive Director
Saskatchewan Craft Council

Appendix Two: List of Exporter Profiles

The consultants wish to thank the following craftspeople for their contribution to this study:

Name	Craft Medium	Province
Aliza Amihude	jewellery/Judaica	MB
Peter Baker	wind chimes	PEI
Sylvie Belanger	Judaica/glass	PQ
Martha Boers	art dolls	ON
Peter Bustin	sculptor	NS
Barbara Cohen	jewellery	BC
Ray Cox	metal	NL
Dawn Detarando	tiles/sculpture	AB
Candy Gallant	ceramic sculpture	PEI
Mark Gibeau	glass	AB
Susan Edgerley	glass	PQ
Jane Evans	textiles	SK
Trudy Gallagher	jewellery	NB
John Glendinning	wood furniture & vessels	PQ
Trudy Golley	ceramics	AB
Jeff Goodman	glass	ON
Scott Hardy	silversmith	AB
Steven Heinemann	ceramics	ON
Jeff Holmwood	glass	AB
Michael Hosaluk	wood turning, furniture	SK
Calvin Hunt	aboriginal arts	BC
Ian Johnston	ceramics	AB
Jane Kenyon	textiles	BC
Rex Lingwood	sculpture (leather)	ON
Lou Lynn	glass	BC
John MacNab	wood sculpture, furniture	NS
Melvin Malkin	ceramics	SK
Dawn McNutt	weaving/sculpture	NS
Paul Mathieu	ceramics	BC
Michael Massie	metal/stone carving	NL
Sandra Millot	glass	AB
Grace Nickel	ceramics	MB
Julia Reimer	glass	AB
Jamie Russell	wood carving/furniture	SK
Evelyn Scott	doll arts	ON
Carol & Richard Selfridge	ceramics	BC
Ed Storch	knives	AB
Chuck Stormes[33]	saddles	AB

[33] The profile of Chuck Stormes was gathered through a conversation with William Clark, a photographer and author who is writing a book about Chuck Stormes.

Susanne Swannie	weaving	NS
Otis Tomas	guitar/violin making	NS
Reed Weir	ceramics	NL

Appendix Three: Key Informant Interviews

Our thanks are extended to the following individuals for their generous participation in this study.

Galleries & Museums

American

Alana Aldort, Bariff Shop for Judaica, Spertus Museum, Chicago, IL
American Visions of Contemporary Craft, St Louis, MO
Pam Balton, Acting Director, Audrey's Museum Store, Skirball Cultural Centre, Los Angeles, CA
David Cohen, Executive Director, Contemporary Crafts Museum Portland, OR
Julia Comer, Owner, Objects of Desire, Louisville, KY
Joanne Cooper, Owner, Mobilia Arts, Cambridge MA
John Cram, Ownwer, New Morning Gallery, Ashville, NC
Dunn Mehler Gallery, Half Moon Bay, CA
Arthur Feldman, Owner, Arthur M. Feldman Gallery, Chicago, IL
Leslie Ferrin, Owner, Ferrin Gallery, Lennox, MA
Hanson Gallery, Houston, TX
Walter Hazzarz, Owner, Topeo Gallery, New Hope, PA
Douglas Heller, Owner, Heller Gallery, New York, NY
Leland Hensley, Guest Curator, Trappings of Texas Exhibition, Museum of the Big Bend, Alpine, TX
Brenda Leder, Owner, By Hand South, Decatur, GA
Lynn Leff, Gallery Representative, Leo Kaplan Modern, New York, NY
Ray Leir, Owner, del Mano Gallery, Los Angeles, CA
Karen Lorene, Owner, Facere Jewellery Art Gallery, Seattle, WA
Mackerel Sky Gallery, East Lansing, MI
David McFadden, Curator, American Museum of Arts and Design, NY
Perimeter Gallery, Chicago, IL
Pucker Gallery, Boston, MA
Don Reeves, Curator, National Cowboy and Western Heritage Museum, Oklahoma City, OK
Dashka Roth, Owner, Dashka Roth Contemporary Jewellery and Judaica, New Orleans, LA
Elouise Rusk, Owner, Obsidian Gallery, Tucson, AZ
Elizabeth Shypertt, Owner, Velvet Da Vinci, San Francisco, CA
Show of Hands, Denver, CO
Rick Snyderman, Owner, Snyderman Gallery, Philadelphia, PA
Allyson Strowbridge, Marketing Director, The Real Mother Goose, Portland, OR
William Traver, Owner, William Traver Gallery, Seattle, WA
Connie Wolf, Contemporary Jewish Museum, San Francisco, CA
Stacey Zaleski, Merchandise Manager, Jewish Museum Gift Shops, New York

Canadian

Sandra Ainsley, Owner, Sandra Ainsley Gallery, Toronto, ON
Sue Jeffries, Education Curator, Gardener Museum of Ceramic Art, Toronto, ON
Elena Lee, Owner, Galerie Elena Lee, Montreal, QC
Sara Levine Petroff, Owner, A Show of Hands Petroff Gallery, Toronto, ON
Barbara Silverberg, Owner, Option Art, Montreal, QC

Craft Events

Bernie Burton, Manager, Atlantic Craft Trade Show
Mark Lyman, Producer, the International Exposition of Sculptural Objects and Functional Art (SOFA)
Wendy Rosen, President and Publisher, Rosen Group (Buyers Market of American Craft, American Style and Niche Magazines)
Carol Ross, Director of Craft Marketing, George Little Management Group (New York International Gift Fair®, California Gift Show).®
Ann Shaffer, Chair, Judaica Craft Show, White Plains NY

On-line Retailers

Toni Sikes, CEO, Guild.com
Shari Boraz, Operator, Judaica-online

Craft Organizations and Collector Groups[34]

American

Sharon Campbell, former President, Art Jewellery Forum, Seattle, WA
Pamela Figenshow Koss, Executive Director, Glass Art Society (GAS)
Reed MacMillan, Director of Marketing & Communications, American Crafts Council, New York, NY
Nicole Pietrantoni, Deputy Directory, Tennessee Arts Commission
Pat Rodimer, Chair, Art Jewellery Forum, San Francisco, CA
Dana Singer, Executive Director, Society of North American Goldsmiths (SNAG)
Linda Van Trump, Managing Director, Craft Organization Development Association (CODA)

Canadian

Carol Beaton, Director, Cape Breton Centre for Craft and Design
Beth Beattie, Nunavut Arts and Crafts Association
Barb Boss, Executive Director, PEI Craft Council
Susan Card, President, Fusion, Ontario
Anne Manuel, Executive Director, Craft Council of Newfoundland & Labrador, TTC-GS Working Group
Tom McFall, Executive Director, Alberta Craft Council

[34] The following collector groups were also contacted but did not respond to the request for an interview: Art Alliance for Contemporary Glass, Renwick Alliance.

Rosalyn Morrison, Ontario Crafts Council
Heather O'Hagan, Executive Director, Crafts Association of British Columbia
Donna Turner, Executive Director, Manitoba Crafts Council

Government Agencies

Dana Boyle, Business Development Officer, Canadian Consulate General, Minneapolis, MN
Marie-Louise Hannan, Deputy Director, Investment, Technology partnerships, Canadian Trade Office, Taipei
Kitty Ko, Trade Commissioner, Consulate General of Canada, Hong Kong
Pam Johnson, Cultural Affairs and Academic Relations Officer, Canadian Consulate General, Los Angeles, CA
Ruriko Noike, Trade Commissioner, Consumer Products, Canadian Embassy, Tokyo
Colette Lekborg, Business Development Officer, Canadian Consulate General, Boston, MA
Robin Mader, Trade Commissioner, Arts and Cultural Industries Promotion Division, Foreign Affairs Canada, Ottawa
Ann Rosen, Cultural Industries Officer, Canadian Consulate General, Chicago, IL
Jane Shaw, Trade Commissioner, Canadian Consulate General, Seattle, WA

Other

Paula Gustafson, Publisher, Artichoke Magazine
Peter Held, Curator of ceramics, Arizona State University
Pamela Ritchie, Art Jewellery Artist and Professor, Nova Scotia College of Art and Design, Halifax, NS
Marilyn Ulen, Executive Director, Arts Business Institute, St. Petersburg, FL

Appendix Four: Distribution Channels & Resources

Multidisciplinary

Key Organizations:	
American Craft Council (ACC) New York, N.Y Tel. 212-274-0630 Email: council@craftcouncil.org http://www.craftcouncil.org **Craft Organization Development Association (CODA)** Onia, Arkansas Tel./Fax. 870-746-4396 Email: info@codacraft.org http://www.codacraft.org	**Arts Council of England** London, UK Tel.011-44-020-793-5307 Email: http://www.britishcouncil.org **British Craft Council** London, UK Tel. 011-44 020 7278 7700 http://craftscouncil.org.uk **British Council Scotland** Edinburgh, Scotland Tel. 011-44(0)131 524 5700 Email:scotland.enquiries@britishcouncil.org http://www2.britishcouncil.org/scotland.htm **Centre for Contemporary Arts** Glasgow, Scotland Tel. 0141-352-4900 Email: gen@cca-glasgow.com http://www.cca-glasgow.com/

Key Events: (Multidisciplinary)	
Buyers Market of American Craft Philadelphia Tel.410.889.2933 http://www.americancraft.com/BMAC/index.html **Philadelphia Museum of Art Craft Show** Tel.215-684-7930 Email: twcpma@philamuseum.org http://www.pmacraftshow.org/ **SOFA, Chicago** Tel 800-563-7632 or 773-506-8860 Email: info@sofaexpo.com	**British Craft Trade Fair** Harrogate, UK Tel. 011-44-1-414-246-446 Email: info@bctf.co.uk http://www.bctf.co.uk **Chelsea Craft Fair** Birmingham, UK Tel. 011-44-0207-806-2508 Email: Chelsea@craftscouncil.org.uk http://www.craftcouncil.org/chelsea **COLLECT**

http://www.sofaexpo.com **SOFA, New York** Tel 800-563-7632 or 773-506-8860 Email: info@sofaexpo.com http://www.sofaexpo.com **New York Gift Fair®** Tel. 800) 272-SHOW Email: :registration@glmshows.com http://www.nyigf.com/05/intro.html **California Gift Show®** Los Angeles, CA Tel. 213-362-5640 Email: aubin_wilson@glmshows.com http://www.californiagiftshow.com/	London, UK Tel. 011-44-0207-806-2508 Email: dwells@craftscouncil.org.uk http://www.craftscouncil.org.uk/collect/index.htm **Spring Fair** Birmingham, UK Tel. 845 051 2610 http://www.springfair.com **Edinburgh Festival** Tel. 0131-473-2001 http://www.eif.co.uk/

Collector Groups: Multidisciplinary	
James Renwick Alliance Bethesda, MD Email: jralffice@jra.or http://www.jra.org **Collectors Circle** American Museum of Arts & Design New York, NY Tel.212.956.3535 http://www.americancraftmuseum.org	**Founders Circle** Mint Museum of Craft + Design Charlotte, North Carolina Tel. 704-337-2008 http://www.founderscircle.org

Key Commercial Galleries:	Multidisciplinary

We have not attempted to provide a comprehensive listing of multidisciplinary craft galleries in the US and the UK as they are too numerous to be covered here. However, for a listing a leading US craft galleries, please see the ***Marketing Guide for Fine Contemporary Craft in the United States*** http://www.infoexport.gc.ca/ie-en/SectorDetail.jsp?nid=562 and for a listing of independent craft galleries in the UK, see the Independent Craft Galleries Association web site (www.icga.org.uk)

Museums: (Multidisciplinary)	
American Museum of Arts and Design New York, NY Tel. (212) 956-3535 http://www.americancraftmuseum.org **Mint Museum of Craft & Design** Charlotte, NC Tel. 704-337-2000 http://www.mintmuseum.org/generalinfo.php **Renwick Gallery of the Smithsonian American Art Museum** Smithsonian Institution Washington, D.C. Ph. (202) 357-2531 Email: info@saam.si.edu http://www.americanart.si.edu/renwick/index.cfm	**Craft Alliance** St. Louis, MO Ph. (314) 725-1177 E-mail : retail@craftalliance.org http://www.craftalliance.org **Victoria and Albert Museum** London, UK Tel. 011-444-(0)20 7943 4700 http://www.vam.ac.uk **Craft And Design Gallery** Leeds, UK Tel.011-44-0113-247-8241 Email.ccdg-art-leeds@pop3.poptel.org.uk http://www.craftcentreleeds.co.uk/

Publications/Websites	(Multidisciplinary)
American Style Baltimore, Maryland Tel. 1-800-272-3892 http://www.americanstyle.com ***Art Business News*** Seven Hills, OH Tel. 888-772-8926 Email: :iafginfo@pfpublish.com http://www.artbusinessnews.com/ ***Artichoke*** Vancouver, BC Email: editor@artichoke.ca http://www.artichoke.ca ***American Craft*** American Craft Council (ACC) New York, New York 10012-4019 Tel. 212-274-0630 http://www.craftcouncil.org **Artisan** (UK) www.artisancrafts.co.uk	***The Crafts Report*** Wilmington, Delaware Tel. 1-800-777-7098 http://www.craftsreport.com ***Crafts Magazine – Crafts Guide*** London, UK Tel. 011-44-0207.806.2538 Email: crafts@craftscouncil.org.uk http://www.craftscouncil.org.uk/ **Guild.com** http://www.guild.com **Guild Sourcebook of Architectural & Interior Art** http://www.guildtrade.com **Independent Craft Galleries Association** London, UK Tel. 011-44-1 0207-806-2538 **Scottish Crafts** www.scottishcrafts.org

Niche: Jewellery

Key Organizations: Jewellery

Society of North American Goldsmiths (SNAG)
Naperville, Illinois
Tel. 630-579-3272
Email: info@snagmetalsmith.org
http://www.snagmetalsmith.org

Society of American Silversmiths (SAS)
Providence, RI
Tel.401/461-6840
Email: sas@silversmithing.com
http://www.silversmithing.com

Association of Contemporary Jewellery
Tel. 011-44-020-8291-4201
Email: enquiries@acj.org.uk
http://www.acj.org.uk/index.jsp

British Jewellers' Association
Birmingham, UK
http://www.bja.org.uk

Key Events: Jewellery

Brilliantly Birmingham Contemporary Jewellery Festival
Birmingham, UK
Tel. 011-44-0800 093 0193
http://www.brilliantlybirmingham.com

Dazzle Contemporary Jewellery Exhibition
UK
Email: tonydazzle@aol.com
http://www.dazzle-exhibitions.com

Goldsmiths' Fair
London, UK
Tel. 011-020 7606 7010
Email: the.clerk@thegoldsmiths.co.uk
http://www.thegoldsmiths.co.uk/events

International Jewellery
London, UK
Tel. 011-44-020 8910 7894
http://www.jewellerylondon.com/

SNAG Annual International Conference
Chicago, 2006
Memphis, 2007
Savannah, 2008
Philadelphia, 2009
Houston, 2010

Tel. (503) 329-2352
Email. snagconference@juno.comm
http://www.snagmetalsmith.org/snag/snagconferences.asp

Collector Groups: Jewellery

Art Jewellery Forum
San Francisco, California
Tel. 847-869-2018
Email: info@artjewelryforum.org

http://www.artjewelryforum.org	

Key Galleries: Jewellery	
Facere Jewellery Art Gallery Seattle, WA Tel. 206-624-6768 Email: facreart@aol.com http://www.facerejewelryart.com **Mobilia Arts** Cambridge MA Tel. 617-876-2109 Email: mobiliaart@aol.com http://www.mobilia-gallery.com **Objects of Desire** Louisville, KY Tel. 502-458-4164 Email: objectsd@bellsouth.net **Obsidian Gallery** Tucson, AZ Tel. 520-577-3598 Email: obsidiagal@earthlink.net **Sculpture to Wear** Santa Monica, CA Tel. 310-829-9960 Email: info@sculpturetowear.com http://www.sculpturetowear.com/ **Velvet Da Vinci** San Francisco, CA Tel. 415-441-0109 Email: info@velvetdavinci.com http://www.velvetdavinci.com	**Argenta** London, UK Tel.011-44-1-904-632-025 Email: design@argenta.co.uk http://www.argenta.co.uk **R Feather Gallery** York, UK Tel. 011-44-1-904-632-025 http://www.argenta.co.uk/ **John McKellar Galleries** Hereford & Cheltenham, UK Tel. 011-44- 1432-354-460, 1242-58-4450

Museums with Jewellery Collections- US

Anchorage Museum of History and Art
Anchorage, AK
Tel: 907-343-4326
http://www.anchoragemuseum.org

Arkansas Centre for the Arts
Little Rock, AR
Tel: 501-372-4000
Email: info@arkarts.com
http://www.arkarts.com

The Contemporary Museum
Honolulu, Hawaii
Tel: 808-526-1322/866-991-2835
http://www.tcmhi.org

Cooper-Hewitt Smithsonian Design Museum
New York, NY
Tel: 212-849-8155
Email:edu@si.edu
http://ndm.si.edu

The Mint Museum
Charlotte, NC
Tel: 704-337-2000
http://www.mintmuseum.org

Museum of Art and Design
New York, NY
Tel: 212-956-3535
Email: info@madmuseum.org
http://americancraftmuseum.org

Museum of Fine Arts
Boston, MA
Tel: 617-267-9300
Email: webmaster@mfa.org
http://www.mfa.org

Museum of Fine Arts
Houston, TX
Tel: 713-639-7300
Email: visitorservices@mfah.org
http://mfah.org

Museum of Fine Arts
Philadelphia, PA
Tel: 215-763-8100
http://philamuseum.org

Oakland Museum of California
Oakland, CA
Tel: 510-238-2200
http://museumca.org

Racine Museum of Art
Racine, WI
Tel: 262-638-8300
http://www.ramart.org

Renwick Gallery
(of the Smithsonian American Art Museum)
Washington, DC
Tel: 202-633-2850
Email: info@saam.si.edu
http://americanart.si.edu/renwick/index.cfm

Tacoma Art Museum
Tacoma, WA
Tel: 253-272-4258
http://www.tacomaartmuseum.org

Toledo Museum of Art
Toledo, OH
Tel: 419-255-8000/800-644-6862
Email: information@toledomuseum.org
http://toledomuseum.org

Publications and Websites:	Jewellery
Art Jewellery Magazine (Jewelers' Circular Keystone) Waukesha, WA Tel. 262-796-8776 ex 421 http://www.artjewelrymag.com ***Metalsmith*** (published by the Society of North American Goldsmiths (SNAG) Napierville, IL Tel. 630-778-6385 Email: info@snagmetalsmith.org http://www.snagmetalsmith.org	**Goldsmiths' Hall** http://www.thegoldsmiths.co.uk/contact/

Niche: Ceramics

Key Organizations:	
The American Ceramic Society (AcerS) Westerville, Ohio Tel. 614-890-4700 Email: info@ceramics.org http://www.ceramics.org	**Archie Bray Foundation for Ceramic Arts** Helena, MT Tel. 406/443-3502 Email: claybiz@archiebray.org http://www.archiebray.org/
National Council on Education for the Ceramic Arts (NCECA) Erie, Colorado Tel. 866-CO NCECA (266-2322) Email: office@nceca.net http://www.nceca.net	**Craft Potters Association** London, UK Tel. 011-44-020 7437 7605 Email: mailto:info@cpaceramics.com http://www.cpaceramics.com/cpa.html

Key Events: Ceramics	
NCECA Annual Conference various locations, Portland, OR in 2006 Tel. 866-CO NCECA (266-2322) Email: office@nceca.net http://www.nceca.net	**Ceramic Art, London** (organized by the Craft Potters Association Tel. 011-44 (0) 207 439 3377 Email: organiser@ceramics.org.uk http://www.ceramics.org.uk/home.php
Los Angeles Pottery Show Tel.760-342-9160 Email:lapotteryshow@aol.com http://www.lapotteryshow.comm	**International Ceramics Festival** Aberystwyth, UK Tel. 011-44 01970 623232 http://www.internationalceramicsfestival.co.uk/
California Conference for the Advancement of Ceramic Art hosted by the John Natsoulas Gallery Tel.530-756-3938 Email: art@natsoulas.com www.natsoulas.com	

Collector Groups: Ceramics	
Friends of Contemporary Ceramics Jupiter, Florida contact information not available	

Specialized Galleries: Ceramics	
Garth Clark Galleries New York, NY Tel. 212-246-2205 Email: info@garthclark.com http://www.garthclark.com **Franklin Parrasch Gallery** New York, NY Tel. 212-246-5360 Email: franklin@franklinparraschgallery.com http://www.franklinparrasch.com/	**Frank Lloyd Gallery** Santa Monica, CA Tel.310-264-3868 Email:info@franklloyd.com http://www.franklloyd.com **Galerie Besson** London, UK/ Tel. 011-44-0207-491-1706 Email: enquiries@galeriebesson.co.uk http://www.galeriebesson.co.uk

Museums: Ceramics	
Schein-Joseph International Museum of Ceramic Art New York State College of Ceramics, Alfred, NY Tel 607-871-2421 Email: ceramicsmuseum@alfred.edu http://ceramicsmuseum.alfred.edu/ **Ceramics Research Centre, Arizona State University Art Museum** Arizona, NM Tel. 480-727-8173 Email: Peter.Held@asu.edu http://asuartmuseum.asu.edu/ceramicsresearchcenter/index.htm	**Gardner Museum of Ceramic Arts** Toronto, ON Tel.416-586-8080 www.gardinermuseum.on.ca **Canadian Museum of Clay and Glass** Waterloo, Ont. Tel.519-746-1882 http://www.canadianclayandglass.ca

Publications/Websites:	Ceramics
Ceramics Monthly Westerville, Ohio Tel. 614-523-1660 http://www.ceramicsmonthly.orgg ***The Studio Potter*** Goffstown, New Hampshire Tel. 603-774-3582 Email: studiopotr@aol.com http://www.studiopotter.orgg	***Clay Times*** Waterford, VA Tel. (540) 882-3576 Email: editorial@claytimes.com http://www.claytimes.com/ ***Ceramic Review*** London, UK Tel. 011-44-44 (0) 20 7439 3377 Email: subscriptions@ceramicreview.com http://www.ceramic-review.co.uk/

Niche: Glass

Key Organizations:	
Glass Art Society (GAS) Seattle, Washington Tel. 206-382-1305 Email: info@glassart.org http://www.glassart.org **Society of Glass Beadmakers** Cleveland, Ohio Tel. 1-888-742-0242 http://www.sgb.org/	**Stained Glass Association of America (SGAA)** 4450 Fenton Road Hartland, Michigan 48353 Tel. 1-800-888-7422 Email: sgaofa@aol.com

Key Events: Glass	
AACG (Art Alliance for Contemporary Glass) Biennial Glass Weekend various locations Tel. 1-800-998-4552 Email: cgca@wheatonvillage.org http://www.contempglass.org	For an extensive list of key glass events, see the AACG web site: http://www.contempglass.org/events/calendar.htmll

Collector Groups: Glass	
Art Alliance for Contemporary Glass Evanston, Illinois Tel./Fax. 847-869-2018 Email: admin@contempglass.org http://www.ContempGlass.org **Coalition of Glass Collectors and Artists** Philadelphia, PA Tel. (215) 925-2800	**Paperweight Collectors Association** High Point, NC Tel. (336) 869-2769 Email: info@paperweight.rorg HTTP://www.paperweight.org

http://www.libertymuseum.org	

## Specialized Galleries: Glass	
Barry Friedman Ltd. New York, NY Tel. 212-794-8950 Email: contact@barryfriedmanltd.com http://www.barryfriedmanltd.com/ **Chappell Gallery** New York, NY Tel. (212)-414-2673 Email: amchappell@aol.com http://www.chappellgallery.com/ **Heller Gallery** New York, NY Tel.(212)-414-4014 Email: info@hellergallery.com http://www.hellergallery.com/	**Leo Kaplan Modern** New York, NY Tel. 212-872-1616 Email: info@lkmodern.com http://www.lkmodern.com **Vetri Glass** Seattle, WA Tel. 206-667-9608 Email: vetri@vetriglass.com http://www.vetriglass.com

## Museums: Glass	
The Corning Museum of Glass One Museum Way Corning, New York 14830-2253 Tel. (607) 937-5371 Fax. (607) 974-8470 Email: cmg@cmog.org http://www.cmog.org	**Museum of Glass** Tacoma, WA Tel. (607) 937-5371 Email: info@museumofglass.org http://www.museumofglass.org

## Publications/Websites: Glass	
GAS News Seattle, WA Tel. (206)382-1305 Email: info@glassart.org http://www.glassart.org/publications.html	

Niche: Judaica

Key Organizations:	
American Guild of Judaic Art Owings Mills, MD http://www.jewishart.org/ **General Assembly (United Jewish Communities)** New York, NY Tel. 212.284.6500 Email: info@ujc.org http://www.ujc.org	**Union for Reformed Judaism** New York, NY Tel. 212.650.4000 http://urj.org

Key Events:	
Judaic Craft Show Bet Am Shalom Synagogue White Plains, NY Tel. 914- 946-8851 http://www.betamshalom.org/	

Specialized Galleries/Shops:	
Arthur M. Feldman Gallery Chicago, IL Tel. 312.274.9987 Email: info@judaicaconnection.com http://www.judaicaconnection.com/ **Audrey's Museum Store**, Skirball Cultural Centre Los Angeles, CA Tel. (310) 440-4505 http://www.skirball.org/audreys **Bariff Shop for Judaica** Spertus Museum Chicago, IL Tel. 312.322.1740 http://www.bariff.org/	**Dashka Roth Contemporary Jewellery & Judaica** New Orleans, LA Tel. 504-523-0805 http://www.dashkaroth.com/jewellery_judaica.htm **Jewish Museum of New York Shops** New York, NY Tel. (212) 423 – 3333 Email: shop@thejm.org http://shop.thejewishmuseum.org/jmuseum/

Museums:	**Judaica**
Contemporary Jewish Museum San Francisco, CA Tel. 415.344.8800 http://www.thecjm.org/ **Jewish Museum of New York** New York, NY Tel. 212.423.3200 http://www.thejewishmuseum.org	Spertus Museum Chicago, IL Tel. 312.322.1700 http://www.spertus.edu/museumm

Niche: Traditional Cowboy/Western Arts

Key Organizations:

American Bladesmith Society
Peralta, New Mexico
Tel. 505-869-3912
Email:
http://www.americanbladesmith.com/

Society of American Silversmiths (SAS)
Tel. 401/461-6840
Providence, RI
Tel.401/461-6840
Email: sas@silversmithing.com
http://www.silversmithing.com

Traditional Cowboys Arts Association
Oklahoma City, Oklahoma
Tel. 406.683.1213
Email: info@tcowboyarts.org
http://www.tcowboyarts.org/

Key Events:

Traditional Cowboys Arts Association Annual Exhibition
Oklahoma City, OK
Tel. 405) 478-2250
http://www.nationalcowboymuseum.org/e_tcaa_info.htm

National Cowboy Poetry Gathering
Elko, Nevada
Email: hollerin@CowboyPoetry.com
http://www.cowboypoetry.com/

Trappings of Texas
Museum of the Big Bend
Alpine Texas
Tel. (432) 837-8143
http://www.sulross.edu/~museum/trappings.html

National Finals Rodeo Cowboy Christmas Show
Las Vegas, Nevada
Email. zandy@lasvegasevents.com
http://www.lasvegasevents.com/events/event-12022005-cowbo

Trappings of the American West
Dry Creek Arts Fellowship
Flagstaff, Arizona
Tel. 920-774-8861
Email: dcaf@infomagic.net
http://www.drycreekarts.com

Specialized Galleries:

Clagett/Rey Gallery
Vail, CO
Tel. 1-800-252-4438
http://www.claggettrey.comm

Museums:	**Traditional Cowboy culture**
National Cowboy and Western Heritage Museum Oklahoma City, OK Tel.(405) 478-2250 http://www.nationalcowboymuseum.org/	**Museum of the American West** Los Angeles, CA Tel. 323.667.2000 http://www.museumoftheamericanwest.org/

Publications:	
American Cowboy Magazine http://www.americancowboy.com	***Cowboys and Indians*** http://www.cowboysindians.com

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Peartree Solutions Inc. 2001. Study of the Crafts Sector in Canada: Inventory and Summary of Current Literature; Defining the Crafts Sector; Working Together to Develop the Craft Sector. Coordinated by Conseil des métiers d'art du Quebec for The Canadian Craft Federation and prepared for Industry Canada and the Department of Foreign Affairs and International Trade. http://www.canadiancraftsfederation.ca/html/advocate_ccf.html