

Strategic Plan

2004 to 2006

THE CRAFTS COUNCIL OF IRELAND IS SUPPORTED BY



A culture that pays more attention to words and music than to material things *is lopsided.*

When we can make things as well as we describe them, and when we can revere the maker as much as the singer, we are on the road to health. That is why the re-finding of our material culture, and the great surge of interest in the work of the craftsman and artist/artisan, is so important in Ireland.

Justin Keating
*in his foreword to *Traditional Crafts of Ireland**
by David Shaw-Smith

Has craft been left behind entirely at the dawn of the new Millennium? *The resounding answer is no,* when the work functions as an indicator of craftsmanship.

In the past, art, craft, and design existed in a rigid triangular relationship;
art reigned supreme and untouchable at the apex,
while craft and design occupied opposing corners at the base.
In the past decade, this triangle has been replaced by a new paradigm
in which art, craft, and design
exist in a *circular arrangement* with each field
supporting, nourishing, informing, and challenging the others.

Craft has not
disappeared from our vision.
It has simply become **embedded**
in the arts and design
of our time.

David Revere McFadden
Chief Curator, Museum of Arts and Design, New York
(in an article in 'Crafts' to celebrate its 30th anniversary)

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one

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Foreword by An Tánaiste.....

We have a long and distinguished tradition of crafts in Ireland. That tradition is still very much a living one and continues to inspire the contemporary craftwork that is now emerging as a feature of the industry in Ireland. Whether producing traditional or more contemporary work, the craft industry is now a significant sector in its own right, and makes an important contribution to other areas of government policy including regional development, tourism and social policy.

As Tánaiste, I recognise the contribution and importance of the crafts sector. This recognition finds practical expression through my Department's continuing support for the Crafts Council of Ireland. The Council plays a leading role in working with craftspeople and others to realise the individual and collective potential of the industry. However, direct funding support is only part of the story. At a wider level, the government is committed to maintaining a competitive economy that creates the conditions necessary for Irish industry to compete internationally. Following a period of unprecedented economic growth at home, Irish industry is now working to maintain its competitiveness at a time when international demand has become more muted. Increasingly the craft industry faces greater international competition from countries with lower cost bases. At the same time, the downturn in the tourism sector is putting pressure on a traditionally important market for craft producers. Ireland's position as an open economy inevitably renders it vulnerable to changes in the international business environment. In the case of the crafts sector it is becoming increasingly clear that the industry's competitive position will in future depend on design and quality rather than price.

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Inevitably, this presents the crafts sector with a challenge in terms of raising design and production standards. In common with other industries, craftspeople will need support in meeting these competitive challenges. One channel of support will be through targeted and accessible education and training. The government's education policy now places a clear emphasis on lifelong learning that enables people at all stages in their career, to address their skills needs. I believe that new educational structures - such as National Qualifications Authority (NQA) and the Further Education and Training Advisory Council (FETAC) in particular – will facilitate a more flexible and targeted approach to learning and qualifications leading to practical work – related skills. This will benefit the crafts sector just as much as any other industrial sector, and should assist the Crafts Council in introducing educational and training programmes to suit the needs of all craftspeople. I am pleased to note the priority attached to this by the Council in this Strategic Plan.

I am also pleased to note that the Council intends to develop further their linkages with those working in the craft industry in Northern Ireland. I feel sure that the strengthening of such collaboration between craftspeople from both parts of the island can only serve to reinforce the future positioning of the sector as a whole.

I would like to express my pleasure in endorsing and supporting this second Strategic Plan of the Crafts Council. As a committed enthusiast for Irish craft, and as a regular buyer of Irish craftwork, I look forward to watching the sector grow from strength to strength over the next three years.

An Tánaiste, Mary Harney, T.D.

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two



Introduction by the Chairman.....

A pride in craft and the desire to produce beautiful and functional work are what defines craftspeople.

Other defining features of the crafts in Ireland can be found in the rich heritage from which modern work draws its inspiration: in the unique materials, colours, and patterns that the Irish landscape provides to the craftsperson. Irish craft weaves together creativity, design, and functionality in a manner that draws upon the oldest traditions of artwork and master craftsmanship. It is also marked by the unique quality of life that it can allow its practitioners, many of whom are fortunate enough to live and work in a setting that is rooted within their own local communities.

Like workers in any sector, however, most craftspeople also seek to earn a living from their craft. Combining the creative impulse, the master of technique, and the commercial imperative is a continuing challenge for those active in the sector. It must be market focused and continually managed if the full potential of the sector, and those working within it, is to be realised.

The Crafts Council has a crucial role to play in charting the development of a vibrant sector that builds commercial success through the creative ability and technical mastery of those working within it. In this respect, the Crafts Council has recorded important achievements through its first Strategic Plan. These include internationally recognised training courses, a substantial and sophisticated database on the craft industry, as well as a number of practical and important supports to craftspeople.

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The preparation of this second Strategic Plan has enabled us to take stock of where the sector is, and to consider how the Crafts Council can best contribute to its further development. We believe that while the craft industry in Ireland is a vibrant sector, it also faces significant new challenges. The industry is characterised by a structure of micro-enterprises, many of which generate relatively low turnover, and some of which struggle to reach the critical mass required to secure competitive advantage. Increasingly, international competition is adding to pressure on price, quality and positioning. In responding to this economic and competitive environment, the Crafts Council believes that a focus on excellence and continuous improvement in what we do is the best way forward. Put simply, the overriding task is to produce better-designed, better-made and competitively priced craftwork that is attractive to consumers on the home and international markets.

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This task is as challenging as it is urgent. Achieving it will mean that all of us concerned with the success of the crafts sector have to raise our game. This means promoting excellence at all levels. It also means ensuring that Irish crafts are designed and made to the highest standard, that craftspeople have the necessary skills to do so, and that consumers at home and abroad are aware of the distinctiveness and high quality of Irish crafts. Consequently, these messages are at the centre of this Strategic Plan, and they will be at the centre of the work of the Crafts Council over the next three years.

“ Crafts Council will act as an **enabler** and **facilitator** of development in the craft sector. As an organisation **we believe** that it is more important to ‘steer rather than to row the boat’.”

The Crafts Council expects to play a central role in leading industry in meeting these challenges. However, the Crafts Council also recognises that it must work in partnership with a variety of other organisations and institutions in order to achieve its strategic goals. In this respect, and drawing upon the expertise and insights of its Board and staff, the Crafts Council will act as an enabler and facilitator of development in the craft sector. As an organisation we believe that it is more important to "steer rather than to row the boat". While in some cases services will be provided directly by the Crafts Council, the Council expects that over the life of this Strategic Plan it will also be appropriate to provide support and leadership to the craft sector by helping to chart rather than to implement ongoing development.

In mapping out this course, the Crafts Council has not strictly limited itself to the conventional three-year time horizon of a strategy statement. The five High Level Goals presented in this plan represent the Crafts Council's ambition for the craft sector in Ireland over the medium to longer term. Some of what we want to achieve will take longer than three years – nevertheless the Crafts Council will make a substantial start to these work programmes over the period 2004 – 2006, and in doing so build a solid platform for the longer-term development of the sector.

Working together with partner agencies and the craft guilds, associations and networks, the state sector, the education sector, and the media, the Crafts Council look forward in confidence to the next three years and to the continuing success and development of Irish craft. The Crafts Council see this next period of time as an important medium term stage in the realisation of the Council's longer-term vision for the crafts sector in Ireland.

Martin Walsh

Chairman, Crafts Council of Ireland

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Cur i láthair an Chathaoirligh.....

Séard a chuireann ceardaithe in iúl nó bród sa cheardaíocht agus an mhian obair fheidhmiúil álainn a tháirgeadh.

Feictear tréithe sainmhínithe eile atá bainteach leis an gceardaíocht in Éirinn san oidhreacht shaibhir óna thógann an obair nua-aimseartha a inspioráid: sna hábhair, dathanna agus patrúin uathúla a chuireann tírdhreach na hÉireann ar fáil don cheardaí. Tá an chruthaitheacht, an dearadh agus an fheidhmiúlacht fite fuaite i gceardaíocht na hÉireann ar bhealach a thógann ar na traidisiúin is sine ealaíne agus saincheardaíochta. Tá tionchar ag caighdeán maireachtála na n-ealaíontóirí, go leor acu atá in ann maireachtáil agus oibriú laistigh dá bpobal áitiúil féin, ar an gceardaíocht agus ar an ealaíon.

Caithfear a chur san áireamh, áfach, go bhfuil na ceardaithe ag iarraidh slí bheatha a shaothrú óna gcuid ceardaíochta. Is dúshlán leanúnach dóibh siúd atá gníomhach san earnáil seo spiorad na cruthaitheachta, teicnicí máistreachta agus riachtanas tráchtála a nascadh le chéile. Caithfidh sé a bheith dírithe ar an margadh agus a bheith á bhainistiú go leanúnach má tá poitéinseal iomlán na hearnála agus iad siúd atá ag obair laistigh di le baint amach.

Tá ról tábhachtach ag Comhairle na Ceardaíochta maidir le forbairt na hearnála beomhaire seo, earnáil a thógann ar rathúlacht thráchtála trí chumas cruthaitheachta agus máistreachta theicniúil iad siúd atá ag obair laistigh di. Chuige seo, tá éachtaí tábhachtacha bainte amach ag Comhairle na Ceardaíochta ina céad plean Straitéiseach.

“ Tá ról tábhachtach ag Comhairle na Ceardaíochta maidir le forbairt na hearnála beomhaire seo, earnáil a thógann ar rathúlacht thráchtála trí chumas cruthaitheachta agus máistreachta theicniúil iad siúd atá ag obair laistigh di. ”

San áireamh tá cúrsaí traenála le haitheantas idirnáisiúnta, bunachar sonraí substaintiúil agus sofaisticiúil de thionsclaíocht na ceardaíochta, chomh maith le tacaíochtaí tábhachtacha agus praiticiúla do cheardaithe.

Chuir ullmhú an dara Phlean Straitéisigh ar ár gcumas breathnú ar cá bhfuil an earnáil anois, agus macnamh a dhéanamh faoin gcaoi a d'fhéadfadh Comhairle na Ceardaíochta cabhrú leis an bhforbairt sa todhchaí. Creideann muidne, ainneoin gur earnáil bheomhar í tionsclaíocht na ceardaíochta in Éirinn, go gcaithfear dul i ngleic le dúshlán nua. Is struchtúr de mhicrifhiontair atá sa tionsclaíocht, go leor acu nach bhfuil ach láimhdeachas beag acu agus cuid eile atá ag stráicíl chun buntáiste iomaíochta a bhaint amach. Mothaíonn Comhairle na Ceardaíochta gurbh é an bealach is fearr le dul chun cinn a dhéanamh maidir leis an timpeallacht eacnamaíoch agus iomaíoch seo nó díriú ar fhoirfeacht agus feabhsúchán leanúnach. Chomh maith leis sin, tá brú ar chostas, caighdeán agus lonnú de bharr na hiomaíochta idirnáisiúnta. De bhrí sin, caithfear ceardaíocht a soláthar atá deartha níos fearr, déanta níos fearr, le praghas iomaíoch, atá tarraingteach do chustaiméirí sna margaí baile agus idirnáisiúnta araon.

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chustaiméirí sna margaí baile agus idirnáisiúnta araon. ”

Is dúshlán é seo ach tá sé práinneach é a chur i gcrích. Tá sé riachtanach do gach duine atá bainteach leis an gceardaíocht tarraingt le chéile chun dul i ngleic leis. Ciallaíonn seo go gcaithfear an fhoirfeacht a chur chun cinn ag gach leibhéal. Ciallaíonn sé freisin go gcaithfear cinntiú go bhfuil ceardaíocht na hÉireann deartha agus déanta ar an gcaighdeán is airde, go bhfuil na scileanna riachtanacha ag na ceardaithe chun seo a dhéanamh agus go dtuigeann na custaiméirí sa bhaile agus thar lear an uathúlacht agus

“ beidh Comhairle na Ceardaíochta ina áisitheoir maidir le cúrsaí forbartha in earnáil na ceardaíochta.

Mar eagraíocht, **mothaíonn muid** go bhfuil sé níos tábhachtaí **’an bád a stiúradh ná a iomramh’.** ”

an caighdeán ard a bhaineann le ceardaíocht na hÉireann. Mar sin de, is cuid lárnach den Phlean Straitéiseach na teachtaireachtaí seo agus beidh siad mar chuid lárnach d'obair na Comhairle Ceardaíochta sa chéad trí bliana eile amach romhainn.

Tá Comhairle na Ceardaíochta le ról lárnach a bheith aici maidir leis an tionsclaíocht a threorú chun dul i ngleic leis na dúshlán seo. Tuigeann Comhairle na Ceardaíochta, áfach, go gcaithfear oibriú i bpáirtíocht le réimse d'eagraíochtaí agus institiúidí eile chun na cuspóirí straitéiseacha a bhaint amach. Chuige sin, agus ag tarraingt as saineolas agus tuiscint an Bhoird agus na foirne, beidh Comhairle na Ceardaíochta ina áisitheoir maidir le cúrsaí forbartha in earnáil na ceardaíochta. Mar eagraíocht, mothaíonn muid go bhfuil sé níos tábhachtaí 'an bád a stiúradh ná a iomramh'. Cé go mbeidh seirbhísí á sholáthar díreach ón gComhairle i gcásanna áirithe, mothaíonn an Chomhairle go mbeidh sé feiliúnach tacaíocht agus cinnireacht a chur ar fáil d'earnáil na ceardaíochta trí forbairt leanúnach a leagan amach ach gan a chur i bhfeidhm.

Níl Comhairle na Ceardaíochta ag cur teorainn uirthi féin maidir le tréimhse trí bliana an ráitis straitéisigh áfach. Tá mian na Comhairle d'earnáil cheardaíochta na hÉireann thar an meán go fadtéarma le sonrú sna cúig cuspóirí Ard Leibhéil atá leagtha amach sa phlean seo. Tógfaidh cuid de na rudáí ar mian linn a bhaint amach níos faide ná trí bliana - ach mar sin féin, cuirfidh Comhairle na Ceardaíochta tús maith leis na clár oibre seo sa tréimhse 2004- 2006, agus ar an gcaoi seo beidh bunchloch dhaingean ann d'fhorbairt fhadtéarmach na hearnála.

Tá Comhairle na Ceardaíochta ag tnúth go muiníneach; agus í ag obair i gcomhair leis na gníomhaireachtaí páirtithe sna ceardchualachtaí, na cumainn agus na líonraí ceardaíochta, earnáil an stáit, earnáil an oideachais, agus na meáin; leis na trí bliana amach romhainn agus le rathúlacht agus forbairt leanúnach na ceardaíochta in Éirinn. Is

céim thábhachtach mheántéarmach í an tréimhse ama amach romhainn, dar leis an gComhairle, maidir le fis fhadtéarmach na Comhairle d'earnáil na ceardaíochta in Éirinn a bhaint amach.

Martin Walsh

Cathaoirleach, Comhairle Cheardaíocht na hÉireann.

“Tógfaidh cuid de na rudaí **ar mian linn a bhaint amach** níos faide ná trí bliana - ach mar sin féin, cuirfidh Comhairle na Ceardaíochta **tús maith** leis na cláir oibre seo sa tréimhse 2004- 2006, agus ar an gcaoi seo beidh **bunchloch dhaingean** ann **d’fhorbairt fhadtéarmach** na hearnála.”

three



Context of the Crafts Council.....

The Crafts Council of Ireland (the Crafts Council) was founded in 1973 as a voluntary organisation to support the crafts and their practitioners. In 1976 it was formed into a not-for-profit company limited by guarantee without share capital, and shortly after received its first grant-in-aid from the IDA (Industrial Development Authority). Upon the closure of Kilkenny Design Workshops, and with additional Government support, the Crafts Council opened new offices in Kilkenny in 1989 and took on additional responsibility for developing design in the various crafts sectors.

The Crafts Council is funded through a grant comprised of state and European funding which is channelled to the organisation by Enterprise Ireland on behalf of the funding Department – Enterprise, Trade and Employment. Enterprise Ireland also has an advisory and monitoring role with the organisation. Although the Crafts Council is a relatively small organisation in terms of its budget and staff, the level of Government financial support underlines the value attached by Government to the role of the Council. It is estimated that the craft sector generated an annual turnover of €84 million in 2002 (The Irish Craft Industry Report 2002). However, its real value is considerably greater when account is taken of its contribution to other sectors, notably tourism and rural development. Three in every four Irish craftspeople are located outside urban areas thereby underlining the contribution of the sector to economic and social life outside the island of Ireland’s principal cities and towns.

In terms of production activity, the craft sector is characterised by multiple micro-industries many with a relatively low turnover. This turnover is generally based on the direct ‘value addition’ of design and craftsmanship, with other input costs being relatively low. The Crafts Council maintains a Register of Craft Enterprise, which currently holds data on over

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1,300 craftspeople and their business profile. Of these, 50% are dependent on sales of craft for their primary income, with 72% employing between one and two full-time employees, and a similar percentage employing part-time seasonal employees. Almost 2 in 3 (64%) enterprises had a turnover of €30,000 or less in 2002, while 32% had a turnover of between €30,000 and €250,000. A small number of craft companies (4%), have turnovers in excess of €250,000 (The Irish Craft Industry Report, 2002).

The primary role of the Crafts Council is the support and development of crafts and craftspeople in Ireland. There are currently 20 defined crafts listed on the Register maintained by the Crafts Council. These numbers are not however distributed evenly across all craft areas. Latest analysis of the Register reveals that nearly 800 craftspeople (62%) were associated with just four areas of craft production – Textiles, Ceramics, Jewellery and Woodworking. In addition to the Irish Government’s co-funding of development carried out by the Crafts Council, activity in the craft sector is also evident in a variety of voluntary and representational bodies. It is estimated for example that there are nearly 60 craft Guilds, Associations, Networks and Societies operating in Ireland, which provide a focal point for those with a shared interest in a particular craft.

Whilst there is some overlap between the craftspeople listed on the Register and the memberships of the Guilds, Associations, Networks and Societies, it is generally the case that those on the Register are more likely to avail of the commercial and developmental services that are the primary purpose of the Crafts Council. As a general rule, the Crafts Council is required to demonstrate a strong commercial and developmental purpose in its business affairs, whereas the Guilds, Associations, Networks and Societies, as voluntary membership bodies, enjoy a wider discretion to pursue and support the interests of their members, whether commercial or otherwise.

It is important to acknowledge that there are a number of agencies and bodies that have a developmental or support role for craft in the island of Ireland, with whom the Crafts Council can work to more effectively support the crafts. In Northern Ireland, for example, these include the Arts Council of Northern Ireland, Invest NI, District and Urban Councils and, in the Republic of Ireland, Údarás na Gaeltachta, FÁS, City and County Enterprise Boards and LEADER Groups. In addition, the Crafts Council notes the critical importance of education providers, accrediting bodies, cultural institutions and the media throughout the island. The importance of establishing productive partnerships and alliances with such bodies is a key part of the context for the Strategic Plan 2004 – 2006.

four



C ommentary on the Key Outcomes of the First Strategic Plan 2000 – 2003.....

The Crafts Council adopted its first Strategic Plan in 2000. The Plan set out an ambitious programme of work with seven goals outlining direction for the sector and the Crafts Council. The Plan came just when the sector was moving from a period of growth to one of relative stagnation. The past three years therefore have been a difficult time for craftspeople but the evidence now suggests that the sector is slowly growing again – in 2002 total income was €84 million compared to €76 million in 2001 (The Irish Craft Industry Report 2002).

The Crafts Council has delivered substantially on the goals articulated in the Strategic Plan. The progress achieved against each of the Plan's goals is laid out in Appendix A. The following achievements should be highlighted:

- the Crafts Council has made significant strides in the support it provides to craftspeople and businesses in developing new product and bringing those products to market. Support for new product development through a wide array of schemes is a growing feature of the Crafts Council's work and over 200 new products or product ranges were directly developed with its support.
- increasing exposure to markets in Ireland and internationally remains the key to raising the income of craftspeople and increasing the turnover of the sector. As the premier route to the home and overseas market, Showcase is still generating significant sales for

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craftspeople with some €39.3 million in craft orders taken over the life of the plan. The Crafts Council has also developed a wide range of marketing programmes for craft businesses including craft fairs in Ireland (12 fairs with 600 enterprises benefiting) and trade missions abroad, mainly in the USA and UK.

- the Crafts Council’s exhibition programme continues to grow from strength to strength and represents a major contribution to raising the profile of the sector. The Crafts Council’s exhibition programme attracted 300,000 visitors in the past three years, which creates a strong foundation for expanding consumer interest in the value addition of design and innovation. The National Craft Gallery provides a dedicated year round platform for showcasing the best in Irish craft.
- the Crafts Council took important steps in expanding the nature and range of its support for crafts business – nearly 1,500 businesses availed of mentoring support, skills training programmes and business training. The Council is increasingly nurturing relations with partner organisations to ensure that the collaborative and mutually supporting arrangements with networks are fully exploited.
- the Crafts Council has greatly expanded its statistical knowledge on the craft sector through the annual and independent sectoral analyses of the craft industry produced since 2000. These analyses are now shaping the Crafts Council’s strategic priorities and focus, allowing it to concentrate on priorities identified by the industry. Together with its improved market intelligence, the Crafts Council is forging a strong role as an information resource – its website is increasingly recognised as a valuable source of information with 130,000 people accessing the website each month. Its information newsletter, ‘Stopress’, has a circulation of 1,833 per issue and is reaching significant client satisfaction ratings at 93%.

The Crafts Council recognises that there are still profound challenges facing the sector and craft companies. Raising the income of craftspeople and turnover of the sector remain resolute needs. The Crafts Council’s independent sectoral analyses confirm the need to focus on design and marketing skills for craftspeople and their businesses. The widespread acknowledgement of these development needs affirms the groundwork of the Crafts Council which put design and marketing firmly at the top of the craft industry’s agenda, and the decision that they should remain a major focus of the Strategic Plan to come.

five



A Challenging Business Environment.....

While the craft sector experienced growth up to 2000, it has over the past two years experienced a slowdown arising from major changes in economic conditions at global and national level. The primary market destination for Irish crafts is the domestic market (for 87% of craftspeople as reported in recent surveys, with Northern Ireland being primary for 7%, the USA/Canada for 5% and the UK for 2%). Sales to tourists represent an important segment of the domestic market, which has been hit by recent events such as the Foot and Mouth epidemic and the tragedy of 9/11 and their resulting impact on visitor numbers to Ireland.

Craftspeople are currently reconsidering market opportunities for Irish crafts, and are interested in the potential of the non-tourism domestic market and in new export outlets. This reconsideration of market structure is taking place at a time of increased global competition in the sector. In recent years, this has been evident in an increased volume of imported craft products arising from improved standards of production in some developing countries, coupled with significantly lower prices. Improving the competitiveness of Irish crafts against a backdrop of increased competition is therefore a key challenge as it is in all aspects of Irish manufacture. While some enterprises within the crafts sector have remained competitive, the issue remains an urgent one for the industry as a whole. While current low interest rates have provided an opportunity for craftspeople to increase investment in their businesses, the slowdown in the Irish and international economy has dampened demand. Consequently, the resilience of the craft sector to adapt to change is now being tested.

“ Improving the competitiveness of Irish crafts against a backdrop of increased competition is therefore a key challenge as it is in all aspects of Irish manufacture. ”

A thorough analysis of consumer behaviour is essential if a full understanding of the various markets for crafts is to be developed. As a result of greater international travel and higher per capita income, Irish consumers are becoming more discerning, more value conscious and more visually literate in terms of design aesthetics. In addition, a more affluent society is beginning to express a greater demand for non-standardised craft products to meet evolving lifestyles. All this means that the sector needs to be more closely tuned in to consumer preferences and behaviours than it has been in the past. However, developing greater market intelligence is a two-way process. Not only does it allow craftspeople an opportunity to tailor their products to consumer demands, but increasingly it also offers them an opportunity to influence buying patterns through an 'educative' process that highlights the attributes of well-designed and well-made craft pieces. These, however, reflect more fundamental and longer-term aspects of market development.

“ As a result of greater international travel and higher per capita income, Irish consumers are becoming **more discerning, more value conscious** and **more visually literate** in terms of design aesthetics. ”

A recognised development challenge for the craft sector is reflected in a growing consumer interest in more innovative and better-designed products. The capacity and willingness of the sector to respond to this interest will greatly determine its future success.

Another development worthy of comment has been the gradual change in the craft production model with 'art' now driving production rather than production driving 'art'. This places a sharper focus on the quality of design. A key challenge for the sector now is to raise the standard of product design. Developing better-designed products invariably means an investment of time and money that involve critical decision and risk. It also assumes an available 'stock' of design skills that the craftsperson can readily access. The potential for growing additional design competence will be explored.

Interactions between craftspeople and consumers are also changing. Distribution outlets for craft products have diversified, and most craftspeople now use more than one channel to market for their products. While direct retailing is still the most popular channel, it would appear that the Internet has not yet proved to be a significant retail channel for additional sales. Nevertheless, it has a part to play in developing awareness and it is an important marketing tool in selling to existing commercial outlets (*The Craft Industry Survey 2001*). Where hands-on experience of the product is important, retail outlets continue to be important, although Irish retailers now feature more imported products, which stand in direct competition with Irish craft.

“ retail outlets continue to be important,
 although Irish retailers
 now feature more imported products,
 which stand in direct competition with Irish craft. ”

Craft micro-enterprises need access to information and development services if they are to make educated decisions and limit risks while achieving long-term success in business. The changing trends outlined earlier suggest a need to take stock of the business model that traditionally underpinned enterprises in the crafts sector. This will include a review of the quality of craft products, a review of the current market positioning of craft products and the potential to expand existing markets and develop new ones.

This is the context in which this plan has been written, with a clear focus on assisting the sector to adjust to the challenge of recent and ongoing economic change. If the challenge is met, the impact of this plan will go well beyond its term.

“ The **changing trends** outlined earlier suggest a need to **take stock of the business model** that traditionally underpinned enterprises in the crafts sector. This will include a review of the **quality** of craft products, a review of the current **market positioning** of craft products and the potential to **expand existing markets** and **develop new ones.** ”

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Meeting the Challenges ahead.....

The Crafts Council occupies a unique space in Irish craft. It is the sole body with a primary responsibility for supporting the development of craftspeople and the craft sector as a whole, but acknowledges that it will best achieve its role in co-operation with other relevant agencies that have related remits in terms of supporting and developing craftspeople.

What then is the distinctive role of the Crafts Council? The answer to this question may be found in the work the Crafts Council does. In particular:

- Supporting craftspeople and guilds, associations, networks and societies in developing their products and markets, thereby contributing to a higher return for their output, and to excellence in the sector.
- Representing the interests of craftspeople nationally and internationally – crucially this involves identifying and articulating key development needs within the sector.
- Brokering the provision of commercial development for craftspeople and their enterprises – while the Council provides some services to craftspeople directly, a more important role involves brokering provision with other agencies. As clearly laid out in the final paragraph of the "Context for the Crafts Council", getting things done through and with strategic partners will be a recurring theme of the Council's work over the next three years. Increasingly this will mean that the Crafts Council will engage in strategic partnerships to deliver results for the crafts sector.

- Serving as a knowledge resource to craftspeople by operating as a recognised first point of contact for all information requirements. As an information and knowledge resource, the Crafts Council seeks to share best practice among craftspeople, and to facilitate access to relevant knowledge and insights. Given the relative isolation of many craftspeople, this will emerge as a very important and effective role in an e-enabled business environment.
- Stimulating excellence and creativity in craft production and design.
- Promoting crafts and craftspeople through carefully targeted strategies aimed at promoting the concept of 'Irish' crafts and their distinctive qualities and attributes.
- In summary, the Crafts Council wishes to champion an Irish craft sector which is founded on a unique set of values – cultural, creative and commercial. To do so the Crafts Council has developed a Strategic Plan that charts the way forward for the sector that celebrates the distinctiveness of its inheritance, and which draws upon this legacy and adds to it, in order to sustain Irish craft's success and secure its future.

“ The Crafts Council wishes to champion an Irish craft sector which is founded on a unique set of values – cultural, creative and commercial. To do so the Crafts Council has developed a Strategic Plan that charts the way forward for the sector that celebrates the distinctiveness of its inheritance, and which draws upon this legacy and adds to it, in order to sustain Irish craft's success and secure its future. ”

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Statement of Core Purpose and Values.....

CORE PURPOSE

The Crafts Council exists to
support and **promote** Irish craft.

The Crafts Council does this by:

- promoting excellence and raising standards through crafts that are well-designed and well-made.
- helping craftspeople to grow successful businesses.
- securing recognition for Irish craft in Ireland and internationally.
- highlighting the creativity and value of Irish craft as an enduring and important reflection of individuality in an increasingly standardised world.
- drawing upon the distinctive identity of Irish craft, both traditional and contemporary.
- collaborating with a wide range of organisations throughout the island of Ireland to promote Irish craft and support craftspeople.

VALUES

The following values underpin how the Crafts Council gives effect to its core purpose:

Community... supporting the capacity of craftspeople to live and work on a sustainable basis as successful enterprises, whilst remaining rooted within their local communities.

Development... supporting craftspeople and enterprises at all stages of development to realise their ambitions.

Partnership... harnessing the support and expertise of other agencies to meet sectoral objectives, rather than attempting to achieve them solely from within the Crafts Council's own resources.

Excellence... promoting excellence in all aspects of Irish-produced craft.

Inclusiveness... creating opportunities for all craftspeople and those with an interest in craft to become involved with the Crafts Council.

Information and insight... sharing understanding on industry and craft dynamics with the sector and the public.

Innovation and creativity... stimulating design innovation and creativity in product development as critical components of future competitiveness.

Heritage... celebrating the distinctive identity of Irish craft, including both traditional and contemporary values and the unique landscape, colours and materials that inspire this work.

Lifelong learning... encouraging craftspeople at all stages of their development to continually renew their skills.

Value of crafts... promoting the value of craft as a source of personal enrichment for all.

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The Crafts Council's High Level Goals.....

Drawing upon the Context and Core Purpose of the Crafts Council, five High Level Goals have been identified to guide the work of the Council over the next three years. These have been developed to re-orient the industry and the Crafts Council in the face of the economic conditions faced by Irish craft today and the conditions that are likely to continue for the next three years.

“

While presented

separately,

the high level goals
are closely connected.”

The High Level Goals the Crafts Council will pursue are:

THEME... **design**

HIGH LEVEL GOAL

Enhancing the standard and quality of design in traditional and contemporary Irish craft, to promote and broaden an appreciation of design in craft across society as a whole, and to serve as a catalyst for dialogue in design, art and craft.

WHY THE GOAL IS IMPORTANT

Developing the quality of contemporary and traditional design will be key to the future health of the sector. The Crafts Council has a central role in stimulating excellence in design and thereby supporting creative activity.

THEME... **knowledge**

HIGH LEVEL GOAL

Positioning the Crafts Council as an easily accessible Knowledge & Information Resource that will provide craftspeople with readily available solutions to queries relevant to practice and business in the crafts sector.

WHY THE GOAL IS IMPORTANT

There is a recognised need for a 'central' resource for all craftspeople, buyers and members of the public who seek information on any aspect of the sector. Equally there is a need to allow craftspeople share skills, insights and experience.

THEME... **marketing**

HIGH LEVEL GOAL

Promoting Irish craft and working with craftspeople to assist them in understanding market dynamics and behaviour, and in identifying and exploiting market opportunities so as to underpin their commercial success.

WHY THE GOAL IS IMPORTANT

Raising the income of craftspeople (where 64% have a turnover of €30,000 or less) is a fundamental cornerstone of the Crafts Council's mandate. Opening opportunities to new markets provides the platform for raising income for the sector as a whole and for individual craftspeople.

THEME... **education**

HIGH LEVEL GOAL

Working both as an independent service provider, and together with other service providers to design education and training services that meet the emerging needs of the crafts sector. The Crafts Council will seek to expand and strengthen the access of craftspeople and prospective craftspeople to these services.

WHY THE GOAL IS IMPORTANT

To strengthen their creative and business acumen, craftspeople seek to continually renew their craft and business skills. Given the scale of the educational and training activity involved, it is not feasible for the Crafts Council to meet all of these needs itself. It will play an important role in helping to identify and develop learning programmes for craftspeople through other learning providers.

THEME... **recognition**

HIGH LEVEL GOAL

Raising the profile of Irish craft in Ireland and internationally. The Crafts Council will also ensure that those who demonstrate consistent mastery in their craft receive appropriate public recognition.

WHY THE GOAL IS IMPORTANT

Craftspeople do not get the widespread recognition from society that they deserve. The Crafts Council will therefore seek to raise the profile of crafts and craftspeople over the life of the plan.

Implicit in each of these High Level Goals is the Crafts Council's intention to work with partner agencies in Northern Ireland to promote, support and develop the craft sector on the island of Ireland as a whole.

“ In the following sections, the Crafts Council
set out the particular **objectives**
associated with each of these goals
and
the **supporting actions**
that will enable us to **achieve** them.”

High Level Goal 1

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“
To work to enhance
the **standard** and **quality of design**
in contemporary and traditional Irish Crafts,
and to **promote** and **broaden**
an **appreciation of design**
in craftwork across society as a whole.”

OBJECTIVES

The Crafts Council will:

- (1.1) support craftspeople in developing their design skills and raising the standard of design.
- (1.2) stimulate and support best practice in Irish contemporary and traditional design, and the Crafts Council will facilitate the interchange of innovative design between Irish and international craftspeople.
- (1.3) promote an understanding of design in craft among the public at large.

SUPPORTING ACTIONS

Actions Under (1.1).....

The Crafts Council will:

- hold Seminars, Mentoring Workshops and Trend Days for craftspeople that will act as a first port of call for those wishing to improve design.
- assist craftspeople in accessing published sources of information on design, photo libraries and linkages to other sources of information e.g. national and international colleges of design.
- create opportunities for designers and craftspeople to work together in the same space and on the same project.

Actions Under (1.2).....

The Crafts Council will:

- introduce a bursary scheme for craftspeople to encourage the development of design skills. The scheme will involve support to pursue design studies in third level colleges of design or individualised programmes of work.
- introduce a ‘visiting designer’ scheme to support craftspeople in introducing highest standard of design in their crafts. This will allow internationally recognised designers to spend time in Ireland working with Irish craftspeople. The Crafts Council will work with Guilds, Associations, Networks and Societies to identify the best options for bringing the scheme to craftspeople.

Actions Under (1.3).....

The Crafts Council will:

- develop an exhibition programme to display the best of Irish and international design in craft. This programme will feature:
 - *a ‘flagship’ high quality annual exhibition in Ireland profiling the best of Irish and international design in crafts for craftspeople and consumers in Ireland*
 - *regular international exhibitions profiling the best of Irish craft and design*
 - *touring exhibitions of crafts throughout the island of Ireland and will create greater links with exhibition spaces in Dublin and elsewhere.*
- develop links with other cultural institutions on the island of Ireland to promote design in craft.

High Level Goal 2.....

knowledgeknowledge²knowledgeknowledgeknowledgeknowledgeknowledgeknowledge

“
To deliberately position the Crafts Council
as an **easily accessible**
knowledge and information resource
that will provide craftspeople with readily available
solutions to queries
relevant to **practice and business**
in the crafts sector. ”

OBJECTIVES

The Crafts Council will:

- (2.1) strengthen its Knowledge Management capacity in order to serve as the first and principal reference point for craftspeople and others seeking information.
- (2.2) act as a clearing house, distributing information between craftspeople, buyers, the media and other interested parties.
- (2.3) extend its research in market trends and amongst consumers, in order to publish insights of critical relevance to the crafts sector and work with those active in the craft sector in Northern Ireland to facilitate the flow of information to all craftspeople irrespective of their business or residential location on the island of Ireland.

SUPPORTING ACTIONS

Actions Under (2.1).....

The Crafts Council will:

- consult with craftspeople and others to identify their particular information needs, and the Crafts Council will use the insights secured as a basis for segmenting the distribution of information on forthcoming events and activities.
- review and update its database structure to ensure that it supports the segmentation of information as necessary.

Actions Under (2.2).....

The Crafts Council will:

- introduce a structured relationship management process for buyers and the media.
- continue to develop the content and profile of Stopress and strengthen its links into national and local media.

Actions Under (2.3).....

The Crafts Council will:

- continue to improve its website to facilitate ready access by craftspeople and others interested in Irish craft, so as to create a "virtual network" leading to improved information exchange.
- seek to engage in structured and regular meetings with institutions in Northern Ireland to ensure the routine exchange of information on events and activities and ensure that the website contains a comprehensive set of links to all relevant websites in Northern Ireland.

High Level Goal 3.....

marketingmarketing³marketingmarketingmarketingmarketingmarketingmarketing

“ To promote Irish craft and work with craftspeople to assist them in understanding **market requirements and behaviour** and in identifying and exploiting **market opportunities,** so as to underpin their **commercial success.** ”

OBJECTIVES

The Crafts Council will:

- (3.1) support craftspeople in developing a better understanding of new markets and help them to take advantage of new opportunities in those markets.
- (3.2) raise the profile of Irish crafts among potential buyers.
- (3.3) strengthen its relationships with targeted groups and professions (e.g. architects, buyers, media).
- (3.4) work to promote an inclusive approach to the development of craft across the island as a whole.
- (3.5) promote craft among the corporate community by stimulating interest in corporate patronage and commissioning of craft.

SUPPORTING ACTIONS

Actions Under (3.1).....

The Crafts Council will:

- work closely with relevant bodies on research and provide craftspeople with information on marketing opportunities in current and emerging markets. Where gaps are identified in consumer and market research, the Crafts Council will take steps to address them.
- act as a ‘clearing house’ cultivating linkages between craftspeople and retailers in current and emerging markets.
- promote stronger linkages at Board level between the Crafts Council, and counterpart boards in related Craft, Arts and Cultural Institutions throughout the island of Ireland.
- contribute to the development of training on marketing, specifically designed to meet the needs of craftspeople, by working closely with relevant development agencies.

Actions Under (3.2).....

The Crafts Council will:

- open dialogue with key buyer groups in order to promote and profile Irish crafts.
- develop the Council’s media relations programme to profile Irish crafts among the wider public.
- re-position Showcase as the primary flagship of Irish craft for the retail sector and review progress annually.
- encourage and enable craftspeople develop direct routes to market.

Actions Under (3.3).....

The Crafts Council will:

- develop events aimed at key groups in order to profile the best in Irish craft.

Actions Under (3.4).....

The Crafts Council will:

- work with the Arts Council of Northern Ireland, academic institutions, guilds and buyers in Northern Ireland to strengthen the position and profile of craft from the island of Ireland.

Actions Under (3.5).....

The Crafts Council will:

- open dialogue with public bodies to promote Irish crafts and in particular to initiate a crafts commissioning programme.
- consult with Fáilte Ireland and inward carriers on the positioning of Irish craft in prominent public and tourist locations.

High Level Goal 4.....

education⁴educationeducationeducationeducationeducationeducationeducationeducation

“ To work both as an independent service provider and, together with other service providers, to facilitate the development of **education and training programmes** to meet the **emerging needs** of the crafts sector and the Crafts Council will seek to **expand and strengthen access** of craftspeople to these programmes. ”

OBJECTIVES

The Crafts Council will:

- (4.1) pursue a deliberate policy of mixed training provision, involving both direct and indirect training delivery.
- (4.2) seek to become a recognised partner in developing the content of educational programmes as they relate to crafts in primary, secondary and third level education.
- (4.3) identify clear learning paths for craftspeople to develop their craft and business skills throughout their career in a way that best suits their individual needs.
- (4.4) act as a broker between craftspeople and education/training providers to ensure that their key learning needs are met.
- (4.5) support craftspeople in securing appropriate teaching qualifications to allow them teach and promote an appreciation of their craft.

SUPPORTING ACTIONS

Actions Under (4.1).....

The Crafts Council will:

- continue to provide direct training services where it is cost-effective to do so and where the quality of that training is recognised and valued by the craft sector.
- facilitate the provision of training "indirectly" by lobbying existing training providers to extend their curricula and develop new training programmes as appropriate as a first response to meeting emerging training needs.

Actions Under (4.2).....

The Crafts Council will:

- encourage the development of a liaison programme for 1st and 2nd level schools promoting the concept of design in craft, and open discussions with the Department of Education and Science to progress it.
- develop linkages with third level colleges, universities and other institutions to influence the content of their craft courses so that they meet identified skills needs of craftspeople.

Actions Under (4.3).....

The Crafts Council will:

- work in partnership with third level colleges to identify and promote opportunities for further research to promote 'mastership' in crafts and/or enhance understanding of crafts and the sector.

Actions Under (4.4).....

The Crafts Council will:

- undertake a development needs analysis of the craft sector in consultation with craftspeople to identify the key learning needs of the sector.
- create an information resource for all craftspeople, through the Crafts Council's website, on current development opportunities with clear linkages to educational and training providers.

Actions Under (4.5).....

The Crafts Council will:

- work with the Department of Education and Science and appropriate educational bodies, to assist craftspeople registered with the Crafts Council to access accredited teacher-training programmes leading to an approved qualification.

High Level Goal 5.....

ognitionrecognition⁵recognitionrecognitionrecognitionrecognitionrecognitionrecognitionrecognitionrecognitionrecognition

“ To raise the profile of Irish craft in Ireland and internationally.

The Crafts Council will also ensure that those who demonstrate consistent mastery in their craft receive appropriate public recognition. ”

OBJECTIVES

The Crafts Council will:

- (5.1) promote excellence in Irish craft by identifying and profiling work that illustrates the best of traditional and contemporary craft and the Council will also seek to have the craftspeople who produce such work recognised amongst Ireland’s highest achievers.
- (5.2) promote the concept of standard setters in Irish craft, and the Crafts Council will secure the maximum profile possible for these practitioners in Irish and international media.
- (5.3) seek to work with cultural and educational organisations throughout the island of Ireland, to ensure that craftspeople working in Northern Ireland can access any arrangements that emerge to support the recognition framework.

SUPPORTING ACTIONS

Actions Under (5.1).....

The Crafts Council will:

- create a structure for the craft sector – analogous to Aosdána – that will provide a vehicle for the full and proper recognition of those who have attained the highest standards in their craft.

Actions Under (5.2).....

The Crafts Council will:

- establish a promotion which leads to the profiling of a different craftsman each month in the national and/or international media.

Actions Under (5.3).....

The Crafts Council will:

- open dialogue with representatives of cultural institutions throughout the island of Ireland to participate in a working group to design and develop a recognition framework that will be open to all craftspeople working on the island of Ireland.

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Developing the Council as a Best Practice Organisation.....

The five high level goals that the Crafts Council has identified to guide its work over the next three years and beyond, represent a significant implementation challenge. The Crafts Council is committed to building its organisation so that it is well-positioned to serve the needs of craftspeople by delivering first rate services. In developing the Crafts Council as a best practice organisation, the Council will build on the principles of an inclusive, transparent and open Council that works in close partnership with all parties who can contribute to developing the sector and individual craftspeople throughout the island of Ireland.

The Organisational Goal – to develop the Crafts Council as a best practice organisation that is characterised by the excellence with which it delivers services for the benefit of craftspeople and other stakeholders.

“ the Council will build on the principles of an **inclusive, transparent and open** Council that works in **close partnership** with all parties who can contribute to developing the sector and individual craftspeople throughout the island of Ireland. ”

OBJECTIVES

The Crafts Council will:

- (1) strengthen its communications practices so as to better support those listed on the Crafts Council's Register of Craft Enterprise and other stakeholders with an interest in Irish craft.
- (2) develop the skills and confidence within the organisation to deliver a quality service for craftspeople and other stakeholders.
- (3) review and develop all its business systems and processes so that they enable the Crafts Council to deliver a quality service to its clients.
- (4) ensure that the Crafts Council's technology supports the organisation in delivering a quality service for its clients.
- (5) develop benchmark standards against which to test its performance.

Actions Under (1).....

The Crafts Council will:

- conduct a review of all existing communications channels.
- strengthen existing communications programmes to ensure that all stakeholders with an interest in Irish craft are kept up to date on the work of the Crafts Council.

Actions Under (2).....

The Crafts Council will:

- strengthen the Council's programme of training and development for the Board and the Crafts Council's staff.
- foster innovative and collaborative working styles.
- develop clear links between individual and organisational performance.

Actions Under (3).....

The Crafts Council will:

- review the use and application of the Register as a core information system.
- develop a Customer Service Action Plan to define service standards and quality.
- review the Crafts Council's existing marketing support channels (Showcase etc.).
- establish a suite of Key Performance Indicators to track business performance.
- support the Board through the provision of information necessary for the proper discharge of its corporate governance responsibilities.

Actions Under (4).....

The Crafts Council will:

- develop the Crafts Council's website to ensure that it is client friendly and clear.
- extend the functionality of the website to strengthen its role as a communications channel and information resource for craftspeople.
- strengthen the IT system supporting the Register to ensure that the Crafts Council can match craftspeople with appropriate activities and information.

Actions Under (5).....

The Crafts Council will:

- develop and extend the Crafts Council's client feedback mechanisms to check their performance as an organisation.
- identify and evaluate performance 'benchmarks' used in parallel organisations in a European and International context.
- develop a "Value for Money Framework" for the organisation setting out annual measures for the Economy, Efficiency and Effectiveness of service delivery.

“ The Organisational Goal...
to develop the Crafts Council as a
best practice organisation that is
characterised by the **excellence**
with which it delivers services
for the **benefit of craftspeople**
and other stakeholders. ”

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Achieving the Crafts Council's Goals and Objectives.....

GENERAL

As a result of this Strategic Plan, the Chief Executive and his team prepared an annual Business Plan for each of the three years covering the period 2004 – 2006.

In doing this, the senior management group at the Crafts Council recognised that they must:

- prioritise the Supporting Actions set out in this document.
- identify the resources required by each supporting action and allocate available resources within the office accordingly.
- set out agreed target output measures that will reflect the volume and quality of achievements to be secured.
- develop a suite of Key Performance Indicators (KPI) that will allow progress in achieving declared targets to be tracked (this will include KPI's to track all the different strands of the Crafts Council's work). Performance measures will also be developed to track progress in other areas such as the preparation and dissemination of special reports, the extent of liaison with other bodies and institutions that might contribute to the crafts sector, and the Crafts Council's success in strengthening the Council's own internal business systems.

- identify the impacts secured under each objective (in terms of beneficial impacts secured for craftspeople or the craft sector more broadly).
- prepare a timeframe for each year of this Strategic Plan within which the stated supporting actions are to be taken and the associated achievements are to be secured.

These business plans will be used to guide the work of the executive on an annual basis, and will serve as a focal point for quarterly progress reviews which will be led by the Chairman and will involve the Chief Executive Officer and the senior management group within the executive.

TARGETS AND TIMEFRAMES

Drawing upon the supporting actions listed under each of the Crafts Council's High Level Goals, the Council will develop a series of targets, the achievement of which, on an incremental basis over the three-year period covered by this Strategic Plan, will culminate in the realisation of the Objectives stated under each Goal. In order to map out the periodic achievement of these targets, the Crafts Council will frame them within the quarterly periods for each year of the Strategic Plan. Periodic review of progress against these targets will be set as an agenda item for meetings of the Board of the Crafts Council.

As already indicated, this work will be set out in annual Business Plans for each of the years covered by the Strategic Plan.

PERFORMANCE

The Crafts Council believe that monitoring performance in an organisation depends upon two important factors:

- the frequency and nature of performance reviews against targets set out in Business Plans. This depends ultimately on management to lead the performance review process and to report to the Board on progress as required.
- the development of a relevant series of Key Performance Indicators (KPIs) that allow measurement of performance to be carried out in a structured manner. Whilst the suite of KPI's to be used will be developed in final detail within the context of the annual Business Plans, a summary of some indicative measures is presented on pages 70 - 71.

Indicative key performance indicators to be developed in Annual Business Plans...

High Level

Goal 1

design.....

- number of design support events held.
- analysis of results and impact.
- progress in developing exhibition space in Dublin and extending the space available to the National Craft Gallery in Kilkenny.

High Level

Goal 2

knowledge.....

- nature and number of knowledge management Improvements introduced.
- feedback from service users on success of targeted information distribution.
- impacts secured through improved buyer/media relationship management.
- nature and Number of website enhancements.

High Level

Goal 3

marketing.....

- number of training events conducted.
- linkages developed with Northern Ireland bodies.
- linkages with external bodies on promotion and positioning of Irish Crafts.
- innovations around 2nd generation "Showcase" event.

High Level

Goal 4

education.....

- nature and number of "direct" training programmes.
- nature and number of "indirect" training programmes.
- progress secured on "teacher training" opportunities for craftspeople.
- nature and number of linkages developed with third level colleges and other institutions.
- extent and impact of schools liaison programme.

High Level

Goal 5

recognition.....

- nature and impact of recognition framework introduced.
- number and impact of media pieces celebrating achievement in Irish craft.
- nature and number of linkages with Northern Ireland craft bodies.

REPORTING ON PROGRESS

Progress will be reviewed on a quarterly basis against a suite of KPI's to be developed by the Executive and agreed by the Board of the Crafts Council. An annual statement of progress (supported by achievements secured under each KPI's) will be presented in the Annual Report prepared and published by the Crafts Council.

appendix A



The key activities, features and benefits of the Crafts Council's Strategic Plan 2000 – 2003.....

GOAL

To promote the raising of standards in design, innovation, manufacturing and marketing amongst craftspeople (i.e. to improve the business competitiveness of craft enterprises).

activities.....

The Exhibition Programme

features.....

Promotional exhibitions of high quality Irish craft which are toured within the island of Ireland, and overseas, after launch at the Council's National Craft Gallery in Kilkenny.

benefits.....

- launched 26 exhibitions over a 3 year period with innovation themes and a commitment to product excellence.
 - introduced over 300,000 visitors to the best of Irish craft production (*island of Ireland only*).
 - created strategic links with national museums in both NI and RoI.
 - ensured that Irish craft has been covered by BBC and RTE (radio and TV) with enhanced print media coverage.
 - launched 3 major Irish craft exhibitions in the UK, Scandinavia and USA, laying foundations for an international profile.
-

activities.....

Publications on Quality and Best Practice:

(i.e. 'For the Love of Craft', 'Network Best Practice', 'Design and Licensing – Getting more Money from your Designs', 'Doing Business at Showcase')

features.....

Best practice guides:

- for business development, analysing quality in every aspect of a craft business.
- the benefits of joint marketing action by groups of micro-enterprises.
- key design and licensing issues.
- Showcase guide.

benefits.....

- gives current information on key issues identified from ongoing research.
-

activities.....

Hands On

An ebusiness initiative designed to increase the use of the Internet by the craft sector, and to integrate web development into an overall marketing strategy for participant companies.

features.....

- web software was specifically designed to enable users to update and manage content easily.
- project participants trained in site maintenance and digital imaging.
- mentors delivered training on integration of web marketing with an overall strategy for each participant.
- a full suite of publications on web usage.

benefits.....

- over 200 expressions of interest received.
 - provided 34 seminars in 5 locations.
 - over 230 individual mentoring sessions delivered.
 - 40 full new sites and 5 hands on integrated sites.
 - 33 case studies published and 3 hands on internet publications produced.
-

activities.....

Development Awards – New Products:

- *'Made for America' – a design competition for the Celtic market in North America*
- *'Limited Edition' – a design competition for high-end retail market*

features.....

Participants:

- met with leading international advisors appropriate to their sectors.
- developed a workplan, researched and made new product.
- selected groups showed their work at the National Craft Gallery, Kilkenny (*Tabletop – March 2003, Ceramics – Oct 2004*).
- received trend mentoring on sector with designers, stylists and journalists.
- styled photo-shoots.

benefits.....

- 125 new products and/or ranges developed and launched (*July 2001 – Dec 2003*).
- significant profile building/group marketing in key lifestyle media (e.g. *'House and Home', 'Irish Bride' and 'New Home'*).

activities.....

Market Opportunities Seminars

'Doing Business in the USA' and 'Doing Business in Europe'

features.....

Identified key opportunities for selling in the USA and Europe and were presented by experienced exhibitors and trade event organisers.

benefits.....

- 165 attendees were able to assess the potential value to their business.

activities.....

Research Missions Overseas

features.....

Participants:

- brought to key trade events identified by craftspeople and experts in the field.
- provided with a 'show guide' to induct craftspeople on getting the most out of their visit.
- met with key design houses and retailers where appropriate.

benefits.....

- 32 craftspeople gained first hand experience of these markets prior to investing in exhibiting.
-

activities.....

Design and Business Mentoring

- *regionally delivered clinics*
- *telephone service from office*

features.....

- pragmatic, in-depth business development service for craft business, covering marketing, sales, design, production and business development.

benefits.....

- 300 craft businesses per annum utilising service.
 - 85% service approval rating from participants.
-

activities.....

Craft Network Facilitation / Support Schemes

features.....

A collaboration with craft networks (e.g. *CREATE furniture network, Contemporary Irish Glass, TÚS Galway Network, Homethrown*) to achieve significant marketing goals.

benefits.....

- 41 group projects have been facilitated to increase public exposure, awareness and sales.
 - 500 craft businesses have benefited.
-

activities.....

Business Training delivered in partnership with County Enterprise Boards, LEADER Groups and NI District Councils

features.....

Modularised business development programme – curriculum and support material were developed specifically for the craft industry.

benefits.....

- 180 craft businesses have participated in the programme over 3 years.
- 90% satisfaction rating from participants.

activities.....

Skills Training Programmes

features.....

Full-time training in design and production – providing a skilled workforce for the pottery and jewellery sectors.

benefits.....

- 78 graduates gained jobs over 3 years in indigenous companies.

activities.....

Group Insurance Scheme

features.....

Securing better rates on:

- public and product liability.
- health insurance.
- personal accident.

benefits.....

- 167 participants per annum.
 - satisfaction rating of 80%.
-

COMMENTARY

The Crafts Council's research on the craft sector has identified design and marketing as two key development challenges for craftspeople, craft businesses and for the sector as a whole. The annual sectoral analysis shows a growing awareness of these two development needs – thereby confirming the priority that the Crafts Council has attached to them in its first Strategic Plan and its renewed emphasis on design and marketing in its new Strategic Plan.

A defining element of the Crafts Council's work on design is its strong exhibition programme which featured 26 exhibitions over the three years of the plan and which attracted a total of 300,000 visitors to exhibitions in Ireland. The Crafts Council also branched out by promoting Irish exhibitions in the USA, UK and Scandinavia.

The exhibition programme is important but not the sole element in the Crafts Council's strategy to raise the standard of design, innovation, manufacturing and marketing. The Strategic Plan brought about a strong emphasis on new product development with over 150 new products developed through initiatives under the Goal. These were also important opportunities to profile the sector at national and international level. In addition to the programme of technical skills and business skills courses, the Crafts Council has developed some supporting initiatives including design and business mentoring and collaborative arrangements with craft networks. Almost 1200 craft businesses have benefited from the various development programmes that the Crafts Council has offered.

GOAL

To facilitate increased sales of Irish craft products by actively raising the profile of crafts, craftspeople and the crafts industry, both at home and abroad.

activities.....

PR programme focusing on craftspeople and craft product – to national media

features.....

A series of PR campaigns highlighting CCoI craftspeople and craft product i.e. for all exhibitions at the National Craft Gallery, for product promotions such as Tabletop and Wedding and for awards such as Made for America. Also responses to media requests on craftspeople or for craft-related topics – based on relationship building with key media.

benefits.....

Over 4,460 articles/pieces – direct and indirect – in local and national media over 2 years of programme (see also CCoI PR on page 92). This has created a wider public profile of craft and its producers.

activities.....

Presentations on CCoI and Irish craft to International groups, agencies and influencers

features.....

Presentations to a variety of diverse International Groups on craft in Ireland and the work of the Crafts Council. Groups include government officials, craft body representatives and support agencies from countries such as Korea, Oman, Canada, Italy and Wales.

benefits.....

Average of 10 presentations per year over the 3 year period, publicising the Irish 'craft brand' overseas.

activities.....

Subsidised Photography Scheme

features.....

A programme which provides high quality, low cost professional images to craftspeople – which are then used by CCol and the craftspeople to gain media coverage for a wide variety of marketing and PR purposes. Licence for use is held by both CCol and the craftspeople.

benefits.....

20 Subsidised Photography Schemes held from 2000 to 2003 – 257 craftspeople participated and 631 images were produced. The increased availability of professionally produced images of craft has increased the coverage of Irish craft in the quality print media.

activities.....

Image Bank

features.....

A digital resource of all CCol generated images of craft – including images taken for the Subsidised Photography Scheme, the Exhibition Programme, various Product promotions and events (i.e. Showcase and Christmas Presence). These images are displayed on-line, to enable free and easy access by members of the media.

benefits.....

Over 1000 professionally taken images available for use by the media on-line. There have been an estimated 144 images published in national, regional and trade publications over 3 years.

activities.....

Showcase International Trade Fair

features.....

CCol manages this annual trade fair through a joint venture company. It is host to over 9,000 national and international buyers and over 650 exhibitors per year. In particular CCol manages the Village area – and craft specific area where exhibitors have been selected on the basis of product quality.

benefits.....

- approx. 250 craft micro-enterprises exhibit per year with craft sales of approx. €39.3 million over the four years of the CCol Strategic Plan 2000 – 2003: compared to €26.6 million (1996 – 1999), a 48% increase and well in excess of inflation.
 - all research confirms that Showcase remains the premier route to market for craft producers as well as gift and fashion SMEs.
-

activities.....

Christmas Presence at the National Craft Fair –

feature promotion at Ireland's largest retail craft fair

features.....

Branded area within the National Craft Fair for CCol registered craftspeople selected for quality by an international panel of experts.

benefits.....

- 28 CCol selected stands in 2002.
 - sales of approx. €110,080 achieved in 2002.
 - 23 CCol selected stands in 2003.
 - major TV and print media features.
-

activities.....

ccoi.ie website – profile raising function

features.....

www.ccoi.ie provides information on all CCol services and activities – and in addition has a page containing detailed information (and in many cases images) of each craftsperson registered with CCol. It also hosts the Image Bank.

benefits.....

- 1,337 craftspeople's information on-line and over 1000 images on Image Bank
- hit rate is 131,523 per month (Nov. 2003).

activities.....

Participation at overseas trade events

(e.g. *New York International Gift Fair, Sierrad Holland, IJL London, Spring Fair Birmingham*).

features.....

CCol took group stands of Irish craft manufacturers to key trade events, primarily in the US and UK markets and helped to evaluate these markets for future business development for project participants.

benefits.....

- 118 craftspeople supported at events with 791 buyer details recorded in a CCol mailing list and available to event participants.
- 17 new events researched in 3 years.

activities.....

Regional Craft Fair Support Scheme

features.....

A collaboration between CCol and Networks of craft micro-enterprises to increase sales through quality consumer shows.

benefits.....

- 12 shows over the 3 year period with 600 micro-enterprises benefiting.
 - the public was given the opportunity to purchase a wide variety of craft direct from the manufacturer.
 - increased exposure in local media.
 - facilitated participant demand (seen in annual industry research) for direct market routes.
-

activities.....

Short Courses Programme

Intensive short courses in high end manufacturing skills (goldsmithing, gem-setting and ceramics).

features.....

Facilitation of craft enterprises in start up and mid career wishing to increase skills and expand product ranges.

benefits.....

- 275 craft participants over 3 years.
- new products including award winning products from participants enterprises.

activities.....

Display and Sales Seminars / Business Support run nationally and at Showcase

features.....

- tailored to prepare enterprises for optimising sales at shows and to develop customer relationship management skills.
- pre-Showcase advice on display, distribution, packaging and other retailer services.

benefits.....

- 10 seminars in 3 years.
 - 180 participants.
 - 200 craft enterprises per Showcase.
-

COMMENTARY

Despite evidence of a more difficult market for craft products, the Crafts Council has facilitated craftspeople in accessing markets and to raise the profile of the sector nationally and internationally. Showcase continues to be the Crafts Council's premier route to market for craftspeople. Over the period of the first Strategic Plan, an average of 250 micro-enterprises exhibited each year and the event generated sales of €39.3 million – an increase of 48% over 1996 - 1999 aggregated sales figures. The event is therefore a vital route to market enabling craftspeople to generate a substantial proportion of the industry's annual turnover.

The Crafts Council also has a broad range of other supports for craftspeople and their businesses, which are accessible to all craftspeople on the Register. Its initiatives for craftspeople wishing to export include support to participants in international trade fairs. At national level, the Crafts Council has worked closely with company networks to support regional craft fairs with 600 micro-enterprises participating in 12 craft shows. The Crafts Council has also supported 455 craftspeople through its short programme series to expand their skills and product range and more specifically to develop their selling and customer relation skills. The Crafts Council's Image Bank and Subsidised Photography Scheme have provided practical support to over 250 craftspeople, with over 1000 images now available in digital format. The effect has been a large increase in craft coverage across a broad range of key media.

GOAL

To be the key resource of information and intelligence about crafts and the craft Industry in Ireland.

activities.....

Statistical Research Programme –

gathering definitive and impartial statistics on the craft sector

features.....

Annual independent industry Survey providing quantitative and qualitative research on the sector (covering turnover, employment, export levels etc.). Major marketing survey and report on routes to market for the craft industry.

benefits.....

- 4 full reports and 3 summaries produced over 3 years – filling a data vacuum on the craft sector.
 - 3,000 full reports and summaries distributed annually.
 - in order to increase access, data, reports and summaries published on-line since 2002.
-

activities.....

Register of Craft Enterprises –

detailed database of all craftspeople registered with CCol

features.....

Database holding detailed statistics on all craft enterprises registered with CCol, updated annually and used to compile current statistics on topics such as business size, gender, location discipline etc.

benefits.....

- 1,337 craftspeople registered (as at 31 December 2003).

This database is linked automatically to the website to ensure accuracy and efficiency in data presentation.

activities.....

Publications

- on Industry specific topics such as *Short Courses Guide, Retail Guide, Business Information Guide* etc.
- *information sheets/packs*
- *annual report – a yearly report on the activities of CCol and their impact on the sector.*

features.....

A variety of information-based publications, aimed at craftspeople and the general public.

benefits.....

- 11 publications produced and 101,800 distributed over 3 years.
- 16 information sheets on topics relevant to the sector and services provided by CCol and approx. 3,600 distributed per year.
- over 2,000 Annual Reports distributed yearly and 2002 report published on-line for ease of public access.

activities.....

cco.i.e website – information function

features.....

The website acts as an information source for members of the public, buyers, craftspeople, tourists, students, researchers, support agencies etc. It holds a wide variety of forms, downloadable documents and publications etc.

benefits.....

- 16 publications currently on-line in downloadable format.
 - hit rate currently 131,523 per month (based on Nov. 2003 figures) up from an average of 41,000 per month in 2002.
-

activities.....

'Stopress' – *the CCol Newsletter*

features.....

'Stopress' is published in-house and contains news, reviews and opportunities on the craft sector. It is distributed to all craft enterprises on the Register, the CCol mailing list (including industry influencers, colleges and support agencies) and subscribers.

benefits.....

- 10 issues produced per year.
 - 1,833 distributed per issue.
 - all issues published on-line since June 2003.
 - 93% satisfaction rating amongst craftspeople.
-

COMMENTARY

One of the successes of the Crafts Council has been the development of its role as an information resource on the sector. The annual industry reports commissioned by the Crafts Council represent a significant advance in statistics available on the sector, the absence of which was a recognised deficit in bringing a more strategic focus to policy development for the industry. These sectoral reports allow the Crafts Council to develop a sharper focus on the needs of the industry and how to optimise its development programme for ongoing industry growth.

A further feature of the Crafts Council's progress has been the development of Stopress and the Council's website. Stopress is increasingly valued as a rich source of information for craftspeople to keep up-to-date on developments and opportunities, and this is reflected in its consistently high satisfaction ratings. The Crafts Council has deliberately sought to take advantage of on-line information where possible and the marked increase in hits to its website highlights the growing demand for on-line provision of information.

However, the Crafts Council recognises that there is still further scope to enhance its role as an information resource and this is a strong priority under the new Strategic Plan. The sectoral analysis of the craft sector for 2002 indicates strong need for information support to craftspeople on consumer patterns and trends. Based on its performance as an information resource to date, the Crafts Council is well-positioned to further develop its role as the primary source for data on the industry and its markets.

GOAL

To be the accreditation body for crafts in Ireland, which will include quality, manufacturing and training.

activities.....

Development of Quality Accreditation

features.....

Independent research on the development of quality accreditation led to a proposed framework - 'The Excellence Awards' designed to reward and promote the best of contemporary and traditional Irish craft.

benefits.....

Research feeds into the development of the 2004 – 2006 Strategic Plan on Product Innovation.

activities.....

Study and planning of FETAC certification of CCoI Training Programmes

features.....

Discussions with National Awards Authority.

benefits.....

- created the foundation for accreditation activity in Strategic Plan 2004 – 2006.
-

COMMENTARY

Accreditation is a complex area and the Crafts Council made some important strides in paving the way for a more structured, yet flexible, approach to accreditation over the period of the next Strategic Plan. The Crafts Council opened up a dialogue with national accreditation bodies that will form the basis for specific initiatives to stimulate provision of technical and business skills programmes aimed at the needs of craftspeople, and it will play a key role in stimulating access by craftspeople to life long learning.

GOAL

To be facilitator for the development of intermediary organisations which will reflect the views of, and provide profile data on, individual craftspeople and enterprises nationally and regionally.

activities.....

See 'Craft Network Facilitation / Support Scheme' in goal entitled 'To promote the raising of standards in design, innovation, manufacturing and marketing amongst craftspeople' on page 74 –
(i.e. to improve the business competitiveness of craft enterprises).

features.....

Over the period 2001 – 2003, CCol offered a facilitation service to craft groups who wished to develop a common direction in business development.

benefits.....

- 36 craft groups assisted to identify key common directions.
 - 21 new craft networks created.
 - the Council assisted the establishment of an umbrella body for Guilds, Associations, Networks and Societies (GANS) was established in 2002 representing 48 groups.
-

COMMENTARY

The Crafts Council recognises that the success of the craft sector depends to a large extent on working in partnership with a broad range of organisations. The Crafts Council has therefore been active in supporting the establishment of networks and an umbrella organisation of Guilds, Associations, Networks and Societies (GANS). The priority is to ensure that the combined energy of different players in the sector has an effect that is more than the sum of the individual parts.

GOAL

To promote the image and role of the Crafts Council of Ireland within Ireland.

activities.....

PR programme focusing on CCol activities and issues

features.....

A series of PR campaigns highlighting CCol corporate planning, operational activity and events such as Showcase and Christmas Presence.

benefits.....

- 12 CCol-related press campaigns over the 2 years of the programme
(PR benefits for this goal included in PR statistic recorded previously on page 80).
-

activities.....

Roadshows

- *Inform (Summer 2000).*
- *Opportunities (Sept-Nov 2001).*

features.....

Roadshows throughout the island of Ireland promoting the activities in the Strategic Plan and taking up a listening role with clients.

benefits.....

- 280 craftspeople attended 4 'Inform' events.
 - 230 craftspeople attended 7 'Opportunities' events.
-

COMMENTARY

In effect, all of the activities identified under previous goals have a strong impact in raising the profile of the Crafts Council within Ireland. There is evidence to suggest that recognition of the Crafts Council within the sector is growing, e.g. through the high volume of hits on the website. In addition, the Council undertook a number of specific initiatives to raise its profile in particular through the first Strategic Plan. The Council, however, recognises that it needs to take a more targeted approach to its communications with key audiences and the new strategic plan prioritises this area.

GOAL

To work with craft organisations in Northern Ireland to position Irish craft from the island of Ireland on the international scene.

activities.....

Engage NI support agencies in the provision of match funding for NI craft enterprise participation in marketing projects *(to further Contemporary Crafts on the Border – a cross border initiative from Sept 1997 – June 2001 funded under Peace & Reconciliation through Co-operation Ireland).*

features.....

Cross-jurisdiction recruitment of craftspeople to CCol projects.

benefits.....

- project funding supplied to CCol from Invest NI on behalf of NI participants (€48,000).
 - regular information-giving meetings with Craft Development Officers and their local craft clients and groups in NI.
 - NI participation rates in CCol projects ranged from 11% to 15% in 2003.
-

activities.....

Ongoing correspondence and meetings within organisations and crafts bodies in NI.

features.....

There is some interaction with key bodies e.g. Derry City Council, Ulster Museum, Arts Council of NI, Invest NI, Coleraine District Council.

benefits.....

- the positive interaction with key bodies has created a set of relationships which will benefit future strategy for the crafts of the island of Ireland.
-

COMMENTARY

No significant further progress under this goal can be achieved until the establishment of the Arts Council of Northern Ireland's Craft Development Unit, which will be the main focus of craft policy in NI.

appendix B



How the Industry is Made Up – from the Register of Craft Enterprise, 2003.....

as of December 2003

PRODUCTION AREAS	Number of enterprises from production area registered	Number of production area enterprises as a % of total register	Number of enterprises in production area employing 2 – 9 persons	% of enterprises in production area employing
Textile Making	270	20%	80	30%
Ceramics	262	20%	90	34%
Jewellery Making	156	12%	64	41%
Woodworking	141	11%	43	30%
Furniture Making	99	7%	44	44%
Glass Making	94	7%	27	26%
Metalwork	62	5%	20	32%
Paper Making/Working	47	4%	8	17%
Mixed Media Construction	42	3%	18	43%
Basketry	33	2%	7	21%
Stone Working	33	2%	14	42%
Candle Making	17	1%	12	71%
Leather Working	13	1%	8	62%
Sliversmithing/Holloware	13	1%	2	15%
Musical Instrument Making	12	1%	6	50%
Printing	11	1%	1	9%
Horology	5	0.5%	2	40%
Toymaking	5	0.5%	3	60%
Lettering	5	0.5%	0	0%
Thatching	4	0.5%	1	25%
Book Binding	4	0.5%	3	75%
Flytying	1	0.5%	0	0%
TOTAL	1329	–	453	34%

appendix C



Craft Industry Statistics – from the ‘Irish Craft Industry Report, 2002’

This summary is based on The Irish Craft Industry 2002 Report which is published on-line at www.ccoi.ie/publications. It highlights the results of extensive independent qualitative and quantitative research undertaken in early 2003. Specifically, the aim of the study is to support CCoI in keeping up to date with changes in the dynamics of the sector and the challenges and opportunities facing craftspeople.

For the first time in 2002 the survey was circulated to a sample, rather than the full population on the CCoI Register. The purpose of introducing the stratified sample was to increase the accuracy of year on year comparisons of sectoral performance. The total response of 69% is well above the 35% received in 2001.

THE IRISH CRAFT INDUSTRY 2002 – A SUMMARY

A SECTORAL ANALYSIS COMMISSIONED AND PUBLISHED BY THE CRAFTS COUNCIL OF IRELAND

The craft sector in 2002 recovered slightly from the drop in turnover in 2001. Following a period of concern in 2001, craftspeople have recovered a sense of cautious optimism for the future. Overall, 70% of craft businesses increased their turnover in 2002. A minority experienced "excellent" sales over the year. Nonetheless, the performance of the industry in recent times serves to underline its exposure to the global economy. Craftspeople profess themselves to be very dependent on tourist trade, or on the luxury goods market at home, both areas very vulnerable to the current downturn.

“ Specifically, the aim of the summary is to support CCoI in keeping up to date with changes in the dynamics of the sector and the challenges and opportunities facing craftspeople. ”

Many of the challenges identified by craftspeople in 2002 are recurring issues. Aside from the environmental challenges, the difficulties arising in the 2002 research include:

- difficulties accessing the craft customer where businesses are rurally based.
- the conflict of supplier / retailer interests.
- the perceived lack of human resources coupled with a reluctance to ‘let go’ of the quality issue by employing others, and the resulting limits on production capacity.
- the lack of time for marketing and product development.
- increasing competition from imports, while at the same time a low level of Irish exported craft.
- within exports, a significant dependency on US and UK markets – both vulnerable to currency fluctuations.
- reliance on reactive marketing through word of mouth.
- lack of economies of scale in small businesses, putting pressure on margins.

Despite the growth of sales in 2002, and despite the fact that some business principals were keen to maintain their sales at a consistent level, craftspeople still focused when interviewed, on negative factors which they felt were impeding growth. Most compared 2002 with their recollections of the ‘good times’ of the 1990’s. At the same time, there was acknowledgement that growth at earlier rates is not sustainable. In general, the research confirms that the Irish craft sector is a highly cyclical sector, whose growth is intimately linked to the performance of the economy as a whole.

For those who maintained a stable business throughout 2002, it seemed to be existing customers (whether domestic retailers or international buyers through Showcase) who assisted them in keeping a relatively steady stream of orders. Developing new customers and markets was not a priority for 2002, and many craftspeople appear to have postponed such activity until 2003.

In 2002, the craft sector had a higher representation of women than men. As the table below shows, this characteristic has been common to the sector for the past three years.

GENDER OF CRAFTSPEOPLE (2000 – 2002)

	<i>2002 Craft Register</i>	<i>2001 Survey</i>	<i>2000 Survey</i>
Male	46%	48%	47%
Female	54%	52%	53%
TOTAL	100%	100%	100%

As in previous years, the most highly populated disciplines for Irish craft are textiles, ceramics, woodworking and jewellery.

PROFILE OF THE SECTOR BY CRAFT DISCIPLINE

	<i>2002 Craft Register</i>	<i>2001 Craft Register</i>	<i>2000 Craft Register</i>
Ceramics	20%	23%	20%
Furniture	7%	6%	8%
Glass	7%	5%	7%
Jewellery	12%	12%	11%
Metalworking	5%	5%	5%
Mixed Media	3%	2%	3%
Paper	3%	2%	3%
Stone	3%	2%	2%
Textiles	19%	20%	21%
Wood	11%	12%	10%
Other	9%	11%	10%
Unknown	1%	1%	0%
TOTAL	100%	101%*	100%

* *Note that in this and all subsequent tables rounding may affect the total figure.*

The table below shows the proportions of craftspeople on the Register from the two parts of Ireland, North and South.

LOCATION OF CRAFTSPEOPLE

	<i>2002 Craft Register</i>	<i>2001 Craft Register</i>	<i>2000 Craft Register</i>
Republic of Ireland	87%	85%	86%
Northern Ireland	13%	15%	14%
TOTAL	100%	100%	100%

Approximately one third of businesses have been established for longer than ten years. 20% of businesses have been established in the past 3 years, suggesting that the sector is 'refreshing' itself on an ongoing basis.

The table below shows that there are fewer start up companies in the North than in the Republic of Ireland. It also suggests that, for at least a third of businesses in the craft sector, there is perceived to be a continued potential for growth, and optimism for the future.

STAGE OF BUSINESS DEVELOPMENT OF CRAFT BUSINESSES

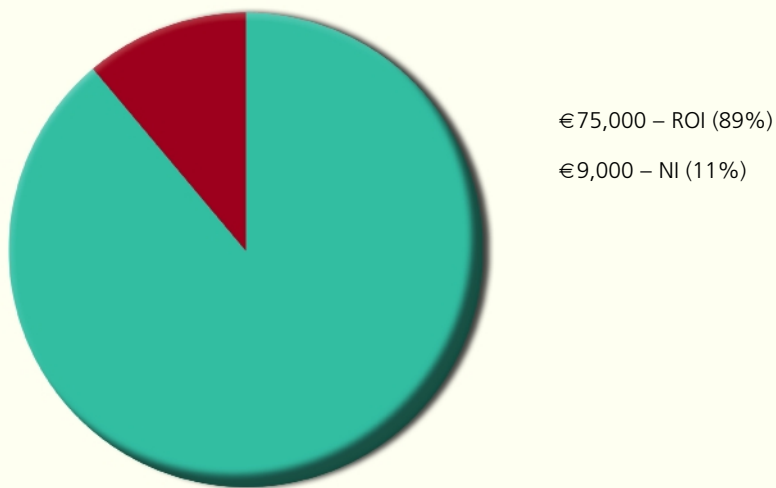
<i>2002 Survey</i>	<i>Northern Ireland</i>	<i>Republic of Ireland</i>	<i>Total</i>
Start up	11%	18%	17%
Growing	26%	34%	33%
Stable	60%	37%	40%
Declining	3%	11%	10%
TOTAL	100%	100%	100%

PROPORTION OF INCOME DERIVED FROM CRAFT BUSINESSES

<i>2002 Survey</i>	<i>Northern Ireland</i>	<i>Republic of Ireland</i>	<i>Total</i>
Less than 50%	22%	26%	26%
51% – 99%	13%	19%	19%
100%	65%	54%	56%
TOTAL	100%	100%	100%

In 2001, for the first time in a decade, the sector experienced a fall in turnover. This year's research shows that there has been a slight recovery from 2001, and that the sector grew modestly in 2002. In general, the picture told by the statistics is also born out by craftspeople's perceptions of the sector. Craftspeople still believe that the craft industry is growing, but at a very slow rate.

The figure below shows that the approximate total income to Irish craft in 2002 was €84 million, with approximately 89% of the sector's turnover being made by companies based in the Republic of Ireland.



In 2002, sales overall increased from approximately €76 million (note that the figure for 2001 has been recast from the earlier research, based on the new information gathered through the CCoI Register update in early 2003) to €84 million.

CHANGES IN GROSS INDUSTRY TURNOVER FROM 2001 TO 2002

<i>2002 Survey</i>	<i>Northern Ireland</i>	<i>Republic of Ireland</i>	<i>Total</i>
Increase	57%	72%	70%
Decrease	43%	28%	30%
TOTAL	100%	100%	100%

COMPARISON OF INDIVIDUAL COMPANY'S TURNOVER, 2001 TO 2002



There is a stark contrast between the 68% of all craft businesses which have a gross turnover of €30,000 or less, and the 4% of craft businesses which have a gross turnover in excess of €250,000.

In 2002, the majority of craftspeople in Ireland were using both direct (to the consumer) and indirect channels (via shops/galleries/agents) to access their market.

TYPES OF DISTRIBUTION CHANNEL USED BY CRAFT BUSINESSES

<i>2002 Survey</i>	<i>Northern Ireland</i>	<i>Republic of Ireland</i>	<i>Total</i>
Direct only	26%	26%	26%
Indirect only	1%	7%	6%
Indirect and Direct	73%	66%	67%
TOTAL	100%	100%	100%

- the qualitative research confirms that craftspeople continue to feel aggrieved at the levels of commission being charged by retail outlets and galleries, and a number are seeking to further develop their direct sales opportunities as a consequence.
- craftspeople are very conscious of the challenge of being dependent on a few sales channels only. This was a key challenge which craftspeople felt they faced in 2002, and one which they hope to address in 2003.
- many emphasised their vulnerability from depending on direct sales only from their own studio and therefore only in their local area. Even craftspeople using retail outlets in their locality felt vulnerable.
- certainly, the number of craftspeople stating that their retail contacts had ‘kept them afloat’ in 2002 would suggest that a mix of sales channels is advantageous during a downturn.

OVERALL USAGE OF DIRECT SALES CHANNELS

<i>2002 Survey</i>	<i>Northern Ireland</i>	<i>Republic of Ireland</i>	<i>Total</i>
From own studio	100%	99%	99%
From own retail outlet	41%	30%	31%
Via retail craft fair	55%	65%	63%
Via own mail order	24%	23%	24%
Via the internet	23%	26%	25%

OVERALL USAGE OF INDIRECT SALES CHANNELS

<i>2002 Survey</i>	<i>Northern Ireland</i>	<i>Republic of Ireland</i>	<i>Total</i>
Specific retailer	55%	66%	65%
Sales through gallery	44%	36%	38%
Via agent / wholesaler	23%	16%	17%
Via architects / interior designers	23%	18%	19%

INDIRECT SALES CHANNELS RANKED NO.1 IN IMPORTANCE BY CRAFT BUSINESSES*

2002 Survey

Specific retailer	56%
Sales through gallery	14%
Via agent / wholesaler	3%
Via architects / interior designers	4%

**no useful 2001 comparison*

appendix D



Crafts Council of Ireland Finances – from the Audited Accounts, 2000 to 2002.....

“
detailed
income
and
expenditure account”

INCOME	2000	2001	2002
	€	€	€
<i>ESF Industrial Programme:</i>			
Jewellery Skills Course	107,737	-	-
Pottery Skills Course	102,116	-	-
Business Skills Course	469	-	-
Blacksmithing Skills Course	100,722	-	-
Product and Marketing Course	81,903	-	-
	<hr/>		
	392,947	-	-
Enterprise Ireland	1,514,776	2,375,082	2,564,701
EU Peace & Reconciliation Grants	125,095	123,091	-
<i>Other Income:</i>			
Showcase Trade Fair Income	203,299	209,524	167,288
Short Courses and Consultancy	79,286	53,456	25,429
Sundry Revenue	10,898	4,467	5,639
Council Member Subscriptions	1,797	2,209	1,983
Publications Sales	286	6,803	9,396
Register Subscriptions	2,014	-	-
Visual Database Registration Fee	2,598	-	-
Louth Gallery Shop	18,216	-	-
Rental Income	5,460	5,803	5,211
Craft Industry Contributions	37,908	57,704	96,128
Pottery Shop	-	-	3,633
National Craft Fair Income	-	-	12,520
Invest Northern Ireland	-	-	38,330
Enterprise Board Programme	-	-	25,000
Bank Interest Earned	-	-	2,053
	<hr/>		
	361,762	339,966	392,610
TOTAL INCOME	2,394,580	2,838,139	2,957,311

EXPENDITURE	2000	2001	2002
	€	€	€
Administration	405,095	480,336	511,904
Promotion Expenses	28,605	24,660	12,680
Craft Development and Information Services	61,695	64,900	76,366
Craft and Design Business Development Course	576	-	-
Craft Product and Development Course	100,810	237,485	239,201
Pottery Skills Course	125,688	139,783	154,636
Jewellery Skills Course	132,608	141,834	147,173
Shop Expenses/Supplier Payments	13,612	-	-
Short Courses and Consultancy	73,212	43,418	12,735
Carlingford Project	158,743	132,434	-
Educational Support	15,324	3,152	-
Training Administration	193,314	230,220	240,896
Short Skills Courses	7,890	-	-
Grant Assistance to Designyard	63,487	57,138	50,790
Blacksmith Skills Course	123,972	129,944	130,000
PR Initiative	30,800	38,249	60,959
IT Development	115,723	116,755	138,802
Regional Focus Group	28,782	-	-
Regional Networks	139,464	150,101	151,823
Regional Exhibition Programme	268,947	300,139	295,784
Development Co-Operatives - Northern Ireland	11,706	10,091	10,092
Quality Accreditation	36,414	71,831	87,967
Statistical Research	45,006	64,976	61,145
Mentoring Courses	-	32,214	23,956
E Business Development	-	227,370	294,495
Craft Design Liaison with Industry	-	154,356	213,288
National Crafts Fair	-	-	27,475
Enterprise Board Programme	-	-	19,480
Bad Debt Provision	-	-	6,177
TOTAL EXPENDITURE	2,181,473	2,851,386	2,967,824
NET SURPLUS/(DEFICIT) FOR YEAR	213,107.00	-13,247.00	-10,513.00