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The National Skills Academy CREATIVE & CULTURAL

Mapping Heritage Craft

The economic contribution of the Heritage Craft sector in England

October 2012

BIS Department for Business Innovation & Skills

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Mapping Heritage Craft: the Economic Contribution of the Heritage Craft Sector in England
Prepared by TBR's Creative & Cultural Team

October 2012

To deliver this research, TBR worked in partnership with Qa Research and independent consultants Victoria Pirie and Sara Selwood.

Please address enquiries about this report to:

Research Department
Creative & Cultural Skills
Lafone House
The Leathermarket
Weston Street
London SE1 3HN

Telephone: 020 7015 1800
Email: london@ccskills.org.uk
www.ccskills.org.uk

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Foreword

We are delighted to present Mapping Heritage Craft, a major piece of economic research to define and measure the size and scope of work in the sector. It stems from ongoing dialogue with Heritage Craft practitioners who felt very strongly that the sector needed to be better understood. This is an often unclearly defined and sometimes hard-to-reach sector, made up of a proliferation of micro-businesses. We are extremely pleased that, through innovative work conducted with the sector itself, we are able to shed new light on this area of the economy.

We are grateful to the Department for Business, Innovation and Skills (BIS), who were responsible for sponsoring the research and who will be keen to hear recommendations from its findings, which is our next stage of work. These recommendations will also build on the work conducted in 2009 to create the Craft Blueprint – Creative & Cultural Skills' original workforce development strategy for the sector – which highlighted the need for further investigation into this area.

The research provides evidence on the size, shape and nature of work in the Heritage Craft sector, which will engender a consistent approach to supporting its workforce in the future. Anecdotal and isolated evidence has led to a lack of awareness of the challenges facing the sector and its real size and scale. This new evidence base shows that over 169,000 people work within it, using traditional hand skills to provide products and services in response to growing public demand. The sector is set to grow in the future; we anticipate a 12% growth in employment in the period leading up to 2022.

For the first time, the research also highlights the significant economic impact of Heritage Craft, with the sector as a whole contributing £4.4 billion in gross value added (GVA) to the UK economy. This is striking for a set of skills and jobs which are often considered hobbyist occupations or lifestyle choices.

The work also uncovers major issues for the future of the sector which must be addressed. The sector is ageing; however, the vast majority of practitioners state that they are not passing on their skills and knowledge to a next generation. Young people will need entry routes and guidance into the sector if it is to be sustainable. Creative & Cultural Skills is committed to helping this happen through programmes such as the new Skills Academy for the Heritage sector, a new set of Craft Skills Awards, and new work to support apprenticeships in Heritage Craft.

We believe that Mapping Heritage Craft has created a substantial body of evidence to inform future work to support the sector. We look forward to a period of direct action planning around Heritage Craft, involving as wide a network as possible. This report is now freely available and publicly accessible via www.creative-blueprint.co.uk, along with the rest of our research. We hope that it will be widely used by the sector and its representative associations to aid their case for support, and by policy makers and stakeholders in order to respond appropriately.

Catherine Large and Pauline Tambling
Joint CEO, Creative & Cultural Skills

Those of us working in Heritage Crafts have been aware of a serious potential loss of skills for many years. In the UK, we still have world-class craftspeople and there is strong demand for their products, but many are approaching retirement without successors. The sector is characterised by large numbers of micro-businesses and sole traders, and devoting time to training or employing assistants is often difficult because of the need to prioritise craft work to make a living. Within the sector, we have been aware of this through anecdotal evidence, and, since it was founded, the Heritage Crafts Association has been calling for a survey to produce real data to confirm this. The quotations of working craftspeople in the report give the true voice of those involved in Heritage Crafts, and this is the first time that the anecdotal and qualitative evidence has been supported by hard facts and quantitative research.

The overall figures are impressive. 83,490 firms in the sector employ 209,390 people in all, with a turnover of £10.8 billion contributing £4.4 billion in gross value added (GVA) to the economy. The sector is also predicted to grow, with employment rising by 12% over the period 2012-2022. These figures again support anecdotal evidence which suggests that there is strong demand for these skills, with the export market for heritage-branded luxury goods being particularly buoyant.

The skilled workforce is ageing, with approximately 50% of the workforce aged between 40 and 60 years old. There are also more people working in the sector over the age of 60 than under the age of 25. This verifies anecdotal evidence from craftspeople and highlights the lack of training opportunities and entry routes to the sector.

Respondents in the survey regard workplace learning as crucial to their current skills, with 73% highlighting formal or informal apprenticeships, mentoring or on-the-job learning as being the most important. However, 63% of the workforce have a level 2 or lower as their highest qualification, which indicates that formal routes do not necessarily exist to train people. At a time of youth unemployment and when many people are looking for more meaningful work, it would be a significant loss to future generations if these businesses – almost all of which are viable and make a valuable contribution to the economy – and the Heritage Craft skills used by them were not passed on to the next generation.

The Heritage Crafts Association looks forward to working with the government, Creative & Cultural Skills, appropriate agencies and with the sector to secure the future of Heritage Crafts. In particular, we want to enable the sector to pass on skills through apprenticeships and qualifications that are relevant for the sector, primarily involving bench-side learning. It is crucial to address the issues highlighted in this report and to create the conditions in which the best of British craftsmanship can flourish.

Robin Wood
Woodworker, Chair of the Heritage Crafts Association
and research steering group member

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Executive Summary

Introduction

This is the first comprehensive study to define, categorise and examine the size and shape of the Heritage Craft sector in England.

To date, Heritage Craft has been a largely under-examined area of the economy. This has been driven by two main factors: the difficulty in identifying and measuring the proliferation of very small businesses that make up the sector; and the challenge of reaching a common definition around what constitutes Heritage Craft practice.

The research has been sponsored by BIS and called upon the expertise of individuals and organisations from within the Heritage Craft sector to formulate and test ideas on an appropriate methodological approach and to achieve clarity around the activities that should be encapsulated in a definition.

Definition

The phrase Heritage Craft means so many different things to different people and organisations, depending on perspective, that arriving at an agreed definition of what constitutes Heritage Craft was arguably the most difficult aspect of this research.

The starting point for the definition was the paper Towards a Definition of Heritage Craft[1], which provides a number of parameters that support the identification of a definition. Based on these parameters, this research defines Heritage Craft as:

"Practices which employ manual dexterity and skill and an understanding of traditional materials, designs and techniques in order to make, repair, restore or conserve buildings, other structures, modes of transport, or more general, portable objects."

In order to satisfy the dual needs of the project (firstly to find a definition that would be meaningful for the sector, and secondly, one that can be measured) the research employs a two-tier definition:

1. A "paper" definition: a listing of the various practices that could be considered to be Heritage Craft, providing specific detail on the nature of the activities and products/outputs/services. This describes in detail the materials and practices used and the products/services created and/or delivered.
2. A "measured" definition: an aggregation of the detailed paper listing, bringing together practices into manageable groups of activity in order that they could be measured.

A table showing the 16 groups of materials and composites in the Heritage Craft definition and 58 subgroups related to individual areas of activity can be found in Chapter 2. The paper definition is available as an annexe to this report.

Method

The key challenge presented by this research was determining a method of measuring the economic footprint of the sector. The method used employed six main steps as follows:

1. Creating a master database of Heritage Craft makers, practitioners and businesses using data available from associations/guilds/membership bodies and online directories.
2. Utilising keyword searches on a business dataset[2] to identify Heritage Craft businesses and their economic activity.
3. Applying weights to this "known universe" of businesses and makers to scale this up to a population estimate.
4. Undertaking a survey of 762 Heritage Craft businesses in order to collect specific data on the nature of activity, business performance and needs.
5. Modelling data from ONS data sources on GVA and workforce demographics.
6. Analysing historic trend data on employment and standard econometric forecasts of anticipated performance in order to estimate a likely future employment footprint.

1 http://creative-blueprint.co.uk/library/item/towards-a-definition-of-heritage-craft1
2 The dataset used for the research was Trends Central Resource. For more information see http://www.tbr.co.uk/pages/tbr-observatory/tcr-database.php

In addition to the core strand of quantitative research, the study also included:

- A series of 22 in-depth interviews with Heritage Craft businesses. Given the size of the sector, it was not possible to undertake interviews with businesses in every craft group. As such interviews were conducted in sets in order to deliver case study information on four craft groups: Stone, Wood & plant, Guns and Instruments. These interviews provide illustrative evidence of the reality of operating in the sector in order to complement (and in some cases contrast with) the quantitative evidence.
- Desk research to develop an understanding of the supply of training available to the sector. This research focussed on the learning opportunities provided through trade associations/guilds and the availability of (and participation in) apprenticeship frameworks allied to Heritage Craft.

Demand for Heritage Craft Skills and Knowledge

The workforce

The sector currently employs a workforce of 209,390 people. This covers all individuals employed in Heritage Craft businesses. A total of 169,550 (81%) of these people use Heritage Craft skills and knowledge for the majority of their working time (Heritage Craft Emp in the table below).

This varies across the different Heritage Craft groups, with businesses in the Paint and Plaster groups stating that more than 90% of their workforce use Heritage Craft skills and knowledge intensively, compared to approximately 70% in Animal and Jewellery.

Table 1: Heritage Craft firms and employment

Group	Firms	Total Emp	Heritage Craft Emp	% Heritage Craft Emp	Avg Heritage Craft Emp per firm*
Paint	21,460	40,990	37,210	91%	1.7
Wood & plant	16,400	34,710	30,710	88%	1.9
Metal	7,140	30,110	23,030	76%	3.2
Textiles	7,970	25,710	20,640	80%	2.6
Clay	4,370	16,550	8,100	49%	1.9
Plaster	11,460	15,600	14,760	95%	1.3
Glass	4,570	9,460	7,230	76%	1.6
Animal	1,030	8,790	6,210	71%	6.0
Stone	2,490	8,470	6,690	79%	2.7
Paper	1,670	7,900	6,160	78%	3.7
Instruments	2,130	3,730	2,910	78%	1.4
Precious metals	1,010	2,560	2,060	80%	2.0
Vehicles	900	2,530	2,010	79%	2.2
Guns	660	1,580	1,320	84%	2.0
Jewellery	120	450	300	67%	2.5
Toys & automata	100	250	210	84%	2.1
Total	**83,490**	**209,390**	**169,550**	**81%**	**2.0**

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/S2)

In terms of distribution across England, the West Midlands has the highest absolute number of Heritage Craft workers, with 37,220 of the workforce being employed in this region, followed by the North West with 32,965. There is a significant gap between these and the next highest employer, Yorkshire and the Humber, with 27,460 employees. Links to broader industrial concentrations in some regions are evident. For example, a higher number of Textiles employees in the North West, East Midlands and Yorkshire and the Humber, and Metal in the West Midlands and Yorkshire and the Humber.

Across the sector, workers tend to be employed in micro-businesses, with 96% of people in firms with 10 employees or fewer. This figure is driven by the fact that 78% of the workforce works independently/ is self-employed (i.e. is employed in a firm with only one employee – themselves). This is reflected in the majority of the workforce (84%) being employed on a permanent, full-time basis[3]. A further 10.6% are permanent, part-time and 5.4% are operating on a non-permanent basis (either a fixed-term contract, casual employment or unpaid). Businesses do call upon this small non-permanent workforce, using an average of 1.3 additional workers (on top of those currently working with this business) per firm in a given year. Scaling these figures up, it is possible that, at any one time, up to 112,530 additional people could be working in the sector.

The key demographic characteristics of the workforce are:

- The sector has a very small proportion of employees from Black, Asian and Minority Ethnic (BAME) backgrounds compared to the average for England; 95% of the workforce is white compared to 90% across the economy as a whole.
- The workforce is predominantly male, 83% are male and 17% are female. This is in stark contrast to the gender balance of England's workforce as a whole, which is 54% male, 46% female.
- Employees in Heritage Craft are much more likely to have no qualifications or other qualifications in comparison to the English workforce as a whole (14% compared to 6%, and 11% compared to 2% respectively) and are also less likely to have a Level 6+ (postgraduate) qualification (2% compared to 10% in England overall).
- The workforce is older than the average for the rest of the economy. This is driven primarily by a lower proportion of workers aged up to 34 (28.6% in Heritage Craft compared to 34.8% in England) and proportionately more workers aged 60+ (11.6% in Heritage Craft compared to 8.5% in England).

Business Performance

Turnover

The total turnover generated by the sector is £10.8 billion, with £5.5 billion being directly attributable to the Heritage Craft elements of the businesses. The turnover per firm generated by Heritage Craft activity is highly variable across the different groups. However, the average turnover per firm that is directly attributable to Heritage Craft is £65k. It should be noted that this is £12k below the VAT threshold.

Animal and Paper generate the most Heritage Craft turnover per firm, with both having a high total turnover and a large percentage directly attributable to Heritage Craft. Toys & automata and Precious metals have the highest percentage (92% and 87% respectively) of turnover directly attributable to Heritage Craft.

3 Self-employed sole traders would be included in this category of permanent employees, but could be employed full or part time in their business.

Table 2: Turnover across the sector

Group	Firms	Total turnover	Turnover directly attributable to Heritage Craft activity	% Heritage Craft turnover	Average Heritage Craft turnover per firm
Animal	1,030	£482,802,420	£384,436,060	80%	£373,240
Paper	1,670	£552,255,170	£458,035,580	83%	£274,270
Precious metals	1,010	£190,198,670	£166,028,230	87%	£164,380
Metal	7,140	£2,206,303,620	£975,775,090	44%	£136,660
Guns	660	£179,944,220	£84,926,720	47%	£128,680
Stone	2,490	£646,808,380	£276,531,510	43%	£111,060
Textiles	7,970	£1,115,642,080	£855,006,230	77%	£107,280
Vehicles	900	£136,672,510	£75,384,960	55%	£83,760
Wood & plant	16,400	£1,740,756,980	£1,324,177,450	76%	£80,740
Toys & automata	100	£8,566,490	£7,896,780	92%	£78,970
Glass	4,570	£613,829,890	£263,537,840	43%	£57,670
Jewellery	120	£13,395,770	£5,896,320	44%	£49,140
Instruments	2,130	£127,567,530	£82,395,790	65%	£38,680
Clay	4,370	£1,178,538,050	£137,412,340	12%	£31,440
Plaster	11,460	£541,239,890	£166,740,390	31%	£14,550
Paint	21,460	£1,112,008,010	£217,082,530	20%	£10,120
Total	**83,490**	**£10,846,529,670**	**£5,481,263,810**	**51%**	**£65,650**

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/S4)

In no single group does 100% of turnover come from Heritage Craft activity. This is not to say that no single business takes 100% of turnover from Heritage Craft activity, rather that this is rare.

Across the sector there are four key activities that businesses engage in to generate revenue (businesses may do one, some or all of the following):

- Making/reproducing things: where a new object or structure is created.
- Repairing/maintaining things: where repairing/maintaining means fixing an item in order to make it functional again, not specifically taking into account the original design and using modern materials alongside original materials.
- Restoring things: where restoring means returning something to a functional state, specifically taking into account the original design and using original materials.
- Conserving things: where conserving means maintaining something to secure its survival, countering deterioration, and preserving the object/building/structure's history and value to the greatest extent possible.

Approximately three-quarters of businesses provide goods/services that involve repairing/maintaining or restoring things, and half of businesses make/reproduce or conserve things. However, this profile of activity changes considerably when businesses are asked to specify the main activity undertaken. This brings making/reproducing and repairing/maintaining to the top of the list.

In terms of reaching the market for these goods/services, the majority of the Heritage Craft sector sells its products/services via word of mouth (73%), which 65% of businesses regard as the most important route in terms of the total value of sales. The next two main methods used were advertising through a directory (30%) or online through the business's or individual's own website (22%). However, these were rarely viewed as the most important methods for contributing to the total value of sales (4% each).

The reliance on word of mouth as the most important method of generating income is reflected in the data on location of customers: the sector is highly dependent on locally-based customers for generating income; an average of 67% of income across the sector is generated from customers based in the local area. However, this is variable by group.

Gross valued added

Across the sector as a whole, GVA is £4.4 billion, with £2.2 billion (50%) of this being directly attributable to the Heritage Craft activities of businesses. Overall, Wood & plant has the highest Heritage Craft GVA (£519m) and has a high proportion of its total GVA as Heritage Craft GVA (76%). Jewellery has the lowest Heritage Craft GVA (£2.3m) and also a relatively low proportion of the total GVA being attributable to Heritage Craft activity (44%).

GVA per head delivered by Heritage Craft employees working in the Heritage Craft aspects of the business is highly variable, ranging from £32k in Guns to £2.8k in Paint. The average for Heritage Craft employees is £12.8k. This compares to an average GVA per head in England of £30.9k.

Guns, Precious metals and Paper deliver the highest levels of GVA per head of the workforce, demonstrating that employers in this group are able to generate the most value from their Heritage Craft skills and knowledge.

Table 3: Gross value added across the sector

Group	Heritage Craft Emp	Total GVA	Heritage Craft GVA	% Heritage Craft GVA	Average Heritage Craft GVA per head
Wood & plant	30,710	£680,846,020	£519,110,600	76%	£16,900
Metal	23,030	£785,541,350	£368,842,500	47%	£16,020
Textiles	20,640	£408,957,460	£313,009,540	77%	£15,170
Paper	6,160	£219,621,480	£190,720,090	87%	£30,950
Animal	6,210	£151,797,360	£124,787,140	82%	£20,090
Stone	6,690	£256,200,660	£109,384,770	43%	£16,350
Paint	37,210	£546,847,780	£106,753,820	20%	£2,870
Glass	7,230	£264,022,380	£104,345,500	40%	£14,440
Plaster	14,760	£307,619,520	£94,768,700	31%	£6,420
Precious metals	2,060	£73,201,760	£63,888,010	87%	£30,960
Clay	8,100	£467,757,850	£55,692,220	12%	£6,870
Guns	1,320	£89,536,930	£42,257,970	47%	£32,000
Instruments	2,910	£59,777,320	£38,413,340	64%	£13,190
Vehicles	2,010	£58,304,970	£32,659,030	56%	£16,250
Toys & automata	210	£4,211,850	£3,882,570	92%	£18,460
Jewellery	300	£5,437,890	£2,393,560	44%	£7,990
Total	**169,550**	**£4,379,682,590**	**£2,170,909,350**	**50%**	**£12,800**

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/S4)

Supply of Heritage Craft Skills and Knowledge

Training requirements and habits

The most popular forms of training and education undertaken to develop Heritage Craft skills and knowledge are experience through working/learning by doing (43%), formal apprenticeships (30%), and mentoring from an experienced craftsperson (21%). This reflects the skills profile of the workforce, particularly the tendency towards either non-qualification based training/learning or vocational qualifications.

Similar patterns occur when it comes to employers maintaining and improving the Heritage Craft skills and knowledge used in the business. The method most commonly used was experience through working/learning by doing (55%). Furthermore, very few pursued short courses, adult education classes, mentoring, or free online tutorials. Of concern, though, is that a fifth of businesses actually do nothing to maintain and improve their Heritage Craft skills and knowledge.

A potential explanation for this is that only one-third (33%) of businesses overall felt that there were currently Heritage Craft skills and/or knowledge that they themselves or their team would like to develop. Where businesses did note the requirement for further skills and knowledge development, this most commonly related to additional skills working with a specific material related to their craft, or formalising their skills through further study and/or qualifications.

New entrants

12% of the Heritage Craft workforce is made up of new entrants who have been working for under a year.

A further 27% of the workforce has been in their current role for 1-5 years. Taking into account a varying learning period of 3-6 years in order to establish skills and knowledge in a craft, it would be fair to describe these two groups combined as "apprentice" workers. In which case, just under 40% of the workforce is in the apprenticeship phase of developing their skills and 60% are established Heritage Craft workers.

New entrants are most likely to be aged between 20 and 34. However, approximately one-third are also likely to be aged between 35 and 49. This reinforces anecdotal evidence that, for many, the move into Heritage Craft is a career change later in life, rather than a first career. It also adds further insight to the age profile of current employees, highlighting the small proportion of young people choosing the sector for their first job.

Training available to the sector

Training from guilds and associations

A review of the learning opportunities provided across Heritage Craft guilds and associations identified that the main type of training provided is at entry level. The aim of this training is largely to support members of the public to learn the basic skills and knowledge of a particular craft, in order to develop as an amateur.

Following on from this, the "next step" of training provided by the guilds is a range of courses to support Continuing Professional Development (CPD) for professionals already operating in the sector. This type of training is aimed at individuals who have already attained a specific level of skill in the craft and who wish to specialise in a certain area. CPD courses are less extensively offered than entry-level courses, but are a significant element of the training offer.

A key element of the offer from guilds in terms of the development of professional (rather than amateur) skills is their engagement with and support of apprenticeships in the sector. The level of engagement in the provision of apprenticeships appears to function at two levels: 1) the guilds act as a mediator for connecting businesses (usually members of the guild) with apprenticeship vacancies to persons seeking an apprenticeship in that craft; 2) a deeper level of engagement with the supply of apprenticeships, including involvement in the design of the apprenticeships and acting as a governing body.

Informal learning and development opportunities – such as exhibitions and lectures, which do not have specific learning objectives but provide the opportunity to keep up to date and network with peers – are also a common feature of the landscape.

Apprenticeships

Mapping the availability of apprenticeships is not a straightforward task. Apprenticeships are offered under a variety of frameworks according to the sector in which they are delivered and data is usually reported at the framework level. Only limited data is available to describe the nature of the apprenticeship and therefore it is not possible to determine the extent of relevant Heritage Craft activity.

However, data is available on the number of vacant apprenticeships currently advertised on the National Apprenticeship Service website and the number of apprenticeships started and achieved in frameworks allied to Heritage Craft between 2002 and 2012.

At the time of writing, there were only 221 vacant apprenticeships currently advertised on the National Apprenticeship Service website in frameworks allied to Heritage Craft, the majority of which tended to be in construction-related activities.

The data on starts and achievements shows a similar bias towards construction-related apprenticeships, with 64% of all those started in the last ten years being in this field.

The Future of Heritage Craft

The size of the footprint

Forecasted employment over the next ten years estimates that the number of employees in the Heritage Craft sector will have grown by 25,000 people (12%) to a total of 234,600 by 2022.

Overall, there is cautious confidence within the Heritage Craft sector for the forthcoming two to three years; 34% of businesses expect some growth in demand, 38% expect that demand will remain at the same level, and only 16% expect demand to decline.

Stone and Precious metals show a percentage change of almost 50%, with Stone also having one of the highest levels of absolute growth. Metal and Paint, starting from some of the higher bases in 2012, also make a significant contribution to absolute growth. Although small in numbers, growth is also well above average in percentage terms in Vehicles and Guns. The forecast also predicts decline in a small number of groups, with Jewellery seeing the largest decline in percentage terms and Wood & plant in absolute terms.

Table 4: Heritage Craft employment forecast 2012-2022

						Change 2012-2022
Group	**2012**	**2017**	**2022**	**Absolute**	**Percent**	**CAGR***
Stone	8,470	10,255	12,380	3,910	46.2%	3.9%
Precious metals	2,560	3,070	3,665	1,105	43.2%	3.7%
Vehicles	2,530	2,895	3,300	770	30.4%	2.7%
Guns	1,580	1,775	1,990	410	25.9%	2.3%
Metal	30,110	33,090	36,300	6,190	20.6%	1.9%
Paint	40,985	44,115	47,355	6,370	15.5%	1.5%
Textiles	25,710	27,415	29,160	3,450	13.4%	1.3%
Clay	16,550	17,615	18,730	2,180	13.2%	1.2%
Toys & automata	245	260	270	25	10.2%	1.0%
Animal	8,790	9,140	9,450	660	7.5%	0.7%
Glass	9,465	9,725	9,995	530	5.6%	0.5%
Plaster	15,595	15,945	16,260	665	4.3%	0.4%
Paper	7,895	7,865	7,820	-75	-0.9%	-0.1%
Wood & plant	34,710	34,410	34,065	-645	-1.9%	-0.2%
Instruments	3,735	3,605	3,470	-265	-7.1%	-0.7%
Jewellery	450	415	385	-65	-14.4%	-1.5%
Total	**209,810**	**221,585**	**234,600**	**25,215**	**12.0%**	**1.1%**

Source: TBR Observatory 2012 (TBR Ref: W1/S6)

* CAGR = Compound Annual Growth Rate

In terms of the drivers behind this anticipated growth, the most prominent causal factor noted by businesses was changes in the state of the economy, followed by increasing awareness/recognition of their brand. Comments around changes in the economy focussed on the positive impact of economic growth and the recession lifting; people having more money to spend and the recession being "good for business" – the latter particularly relating to customers seeking to restore or repair items, rather than buy new.

When considering the changes required to the current workforce in order to meet an increase in demand, three different types of action rise to the top, each noted by approximately one-third of the businesses anticipating growth:

1 No action. Suggesting that some businesses are currently performing under capacity and the increase in work would be met by fully utilising the resources available.
2 Increase working hours/improve use of working time. Just under a third of businesses felt that they would need to either increase the number of hours their staff worked (22%) or increase the productivity of their skilled craft workers (10%).
3 Recruit. Most commonly there was a need to recruit people into non-craft roles. When probed as to which roles these might be, employers mainly commented on administrative functions or sales and marketing.

In terms of the drivers of decline in demand, whilst only 16% of businesses are anticipating decline, this is also mainly driven by the state of the economy. For these businesses the recession was anticipated to continue to have a negative impact on the business, with people having less spending power.

Across the small proportion of businesses in the sector that felt that they were likely to experience decreased demand, the most common response to this was to close the business (14%). Whilst 8% of respondents with decreasing demand felt that they would not have to make any changes if demand decreased, 12% felt that they would need to reduce the size of the workforce in some way, 6% would not replace workers who left the business (either through retirement or leaving for other reasons) and 3% said they themselves would retire.

Legacy and passing on knowledge

Overall, the majority (77%) of businesses in the Heritage Craft sector do not undertake activities to pass on craft skills and knowledge to people outside of the business. For those who do, the most popular activity is to teach informally and free of charge, with 30% of respondents stating that they do this.

Of those who do not undertake any activities, 34% state that they would like to but either do not know how to get involved in such activities, do not have the time, feel that cost would be a prohibiting factor or perceive there to be a lack of interest in such activities.

For those who did not want to participate in such activities, they either did not see the need to (again, there was a perceived lack of interest for such activities), did not have time or had concerns about "training up the competition".

Conclusion

Through this research, there now exists a detailed, robust evidence base that delves in-depth into Heritage Craft activity across England, enabling a new understanding of the sector. The issues and questions it raises will form the basis of debate and review in the next stage of action planning. However, this is an important line in the sand, a grounding of evidence which both the sector and other bodies can use as a starting point from which to move forward.

Introd

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Introduction

1 Introduction

Mapping Heritage Craft, a research report sponsored by BIS, is the first comprehensive study to define, categorise and examine the size and shape of the Heritage Craft sector in England.

To date, Heritage Craft has been a largely under-examined area of the economy. This has been driven by two main factors: the difficulty in identifying and measuring the proliferation of very small businesses that make up the sector, and the challenge of reaching a common definition around what constitutes Heritage Craft practice.

Creative & Cultural Skills has had a long-standing involvement in measuring and defining areas around craft practice, having developed previous methodologies to look in detail at the craft sector as a whole. This has led to previous publications such as the Craft Blueprint and the Cultural Heritage Blueprint, which represented action plans for workforce development in those sectors. Creative & Cultural Skills therefore has a track record of working with organisations such as the Crafts Council, the Heritage Crafts Association and others to provide strategic leadership within an often disparate sector.

Whilst other research has been undertaken on Heritage Craft, it has tended to focus on individual elements of the sector. For example, the 2005 and 2008 research from the National Heritage Training Group (NHTG) focusses solely on crafts allied to traditional building skills, and the 2005 research by EJT Collins focusses on rural crafts. This study represents the first time the different elements have been brought together in a single, inclusive definition.

The challenges associated with this research are numerous. Measuring the economic performance of a sector that is mainly populated by self-employed individuals and micro-businesses (which, due to the nature of their size, traditionally defy accurate measurement) has been a key difficulty to overcome in this study. The research has therefore employed an innovative approach to delivering evidence on current performance, drivers of economic success and the future economic profile of the sector.

In order to provide these solutions, the research has called on the expertise of individuals and organisations from within the Heritage Craft sector to formulate and test ideas on methodological approach and to achieve clarity around the activities that should be encapsulated in a definition. By its nature, Heritage Craft may never have one specific definition, but this research presents a significant benchmark in the discussion on what constitutes Heritage Craft activity.

The outcome represents a step change for the sector and policy makers, providing the opportunity to make evidence-based decisions about the future strategic development of the sector and conduct detailed action planning on the immediate interventions that can be made to support Heritage Craft.

1.1 Aims of Mapping Heritage Craft

The fundamental aim of Mapping Heritage Craft was to arrive at an appropriate definition of what constituted the Heritage Craft sector and determine a method by which the sector could be measured. The research then mapped and profiled the economic performance of the sector in order to underpin an understanding of the demand for and supply of Heritage Craft skills and knowledge. The report provides evidence on:

- The economic profile of the sector, covering the number of businesses and turnover generated, the number of people employed and the productivity of the workforce.
- The structure of the sector in terms of activities undertaken and the skills required to deliver them.
- The likely future employment footprint of the sector.
- The education and training required for the workforce, and from where the sector draws its workforce.
- The key drivers of performance, the actions taken and strategies pursued to ensure the success of businesses.

1.2 Structure of the report

Mapping Heritage Craft is split into six chapters detailing the process and findings of the study. Chapter 2 sets out the new definition of Heritage Craft, and summarises some of the key challenges associated with its development, along with the parameters for the definition. This is informed principally by the research paper Towards a Definition of Heritage Craft, which was produced during the research.

Chapter 3 gives an overview of the methodology used to get to the core of Heritage Craft activity in England. This details the survey process used, the econometric modelling employed for future projections of the sector and the mapping of results back to comparable data for the rest of the UK economy. Further technical detail is also provided in the appendix.

The final three chapters deal in detail with the findings. Chapter 4 looks at the demand for Heritage Craft skills and knowledge, measuring for the first time the number of firms within the sector, the employment footprint and demographic characteristics of the sector. The chapter also provides detailed information on the value of work in Heritage Craft related to the UK economy as a whole.

Chapter 5 takes an in-depth look at the supply side of Heritage Craft skills and knowledge. In particular, this focusses on the flow of new entrants into the sector, the training habits and requirements of those working in the sector, and the availability of training to develop the workforce in England.

Finally, Chapter 6 looks at the future of the sector, incorporating projections of likely employment in the sector over the next ten years. It also looks at perspectives on potential growth from businesses and the overall legacy of Heritage Craft skills, as seen by practitioners.

Defining Heritage Craft

Defining Heritage Craft

2 Defining Heritage Craft

2.1 Existing definitions

The term Heritage Craft means so many different things to different people and organisations, depending on perspective, that arriving at an agreed definition of what it constitutes was arguably the most difficult aspect of this research. The problems involved in succinctly articulating what constitutes Heritage Craft are reflected in the fragmented infrastructure supporting the sector, which is driven by its multifaceted nature. Pertinent examples of this are:

- The range of Sector Skills Councils (SSCs) with an interest in Heritage Craft. To date, Heritage Craft has featured to a greater or lesser extent in the remits of Creative & Cultural Skills, ConstructionSkills (whose remit includes traditional building skills), Lantra (whose remit includes rural skills), Skillset (whose remit includes fashion and textiles), Proskills (whose remit includes Glass, Ceramics and Paper) and People 1st (whose remit includes Tourism).[4]

- The proliferation of guilds, societies and livery companies associated with the various crafts and trades. In addition to this, there are many geographically focussed organisations concentrating on various crafts, rather than any one in particular.

- Established support from the government for contemporary craft as part of the creative industries, in comparison to the limited support for Heritage Craft. The Crafts Council has a remit for contemporary craft as a subset of the creative industries through funding from the Arts Council. This contrasts with the recently formed Heritage Crafts Association, a voluntary organisation, the purpose of which is to advocate traditional Heritage Crafts.

- Established support from charities (for example, the Heritage Lottery Fund, National Trust and the Prince's Charities[5]) and English Heritage (an executive Non-Departmental Public Body) to preserve the craft skills used to maintain our traditional/historic buildings and landscapes. However, the support tends to be piecemeal rather than strategic, except where it focusses on craft which relates to the fixed built environment.

Prior research into Heritage Craft tends to have been delivered by this type of supporting organisation, with specific sectoral remits (or individuals with a particular research interest). Consequently, the definitions used have tended to focus on what could be considered, in the context of this research, to be a narrow range of sectors.

4 It should be noted that ProSkills ceased to operate as a licensed Sector Skills Council in summer 2012. However, it continues to operate as an employer-led organisation that represents the interests of the industries that make up the process and manufacturing sector to government.

5 The Prince's Charities are a group of not-for-profit organisations of which the Prince of Wales is Patron or President. For more information see: http://www.princeofwales.gov.uk/personalprofiles/theprinceofwales/atwork/theprincescharities/

2.2 A new definition

The creation of the BIS Craft Skills Advisory Board (CSAB) and the subsequent commissioning of this research by BIS presented the opportunity to develop a new, broad and all-encompassing definition of Heritage Craft. As such, in preparation for this research, the CSAB produced an initial definition that could be used a starting point. This suggested that:

"Heritage Craft activity:

- is taken to mean that which involves a high degree of hand skill and produces 'useful' objects, rather than predominately machine-orientated/based activity (although the use of manufacturing-oriented machinery does not necessarily rule out the inclusion of that type of activity within the project). This also includes industrial town-based crafts where such hand skill is still a significant factor.
- includes those products associated with material culture through to the production of aesthetic artefacts (for example, handmade jewellery and textile production), but excludes broader creative activity such as music, dance and traditional painting.
- produces products that are in demand and in use for today, but the hand skill involved is often of the traditional or heritage form, or derived from knowledge and application of that form."

In considering this definition, it was necessary to:

- consider how it might sit within the context of other research on the craft sector, and the definitions previously used, and
- take into account the views of key stakeholder organisations.

This would allow the drivers of differentiation in a new definition to be evident in comparison to those used in previous research.

In order to do this, an initial phase of work was carried out separately to this report, to identify common themes that might support an overarching definition. The research resulted in the publication of Towards a Definition of Heritage Craft[6], which provides broad framing and context, from which it is possible to identify the parameters that define Heritage Craft as it currently exists in England.

Towards a Definition of Heritage Craft provided the following "cues" that were used to inform a definition used in the mapping research.

The paper recognised that:

"Craft practice defies easy categorisation because it ranges from innovative work that is experimental both in terms of its vision and its use of material, to traditional craft that supports and preserves our cultural heritage. It covers a spread of material disciplines from textiles to ceramics, woodwork to jewellery, and a range of products from small, portable items to architectural structures of considerable scale. It is exemplified by an engagement with material, form and function."

However, it proposed that the research used a definition of Heritage Craft that broadly incorporated:

"Practices which employ manual dexterity and skill, and an understanding of traditional materials, designs and techniques to make or repair useful things."

Reviewing the existing definitions in detail, the paper noted variances, but also identified key elements that are generally recognised as synonymous with craft making:

"Most craft practice will reflect some, if not all, of the following:

- Understanding of and engagement with materials
- The application of haptic[7] skills and hand-controlled tools
- The honing of skills learned over time
- One-off or relatively small batch rather than mass production
- Maker impact on conception, design and aesthetics of finished product
- Cultural embedding of finished product."

6 http://creative-blueprint.co.uk/library/item/towards-a-definition-of-heritage-craft1
7 Relating to or based on the sense of touch.

Cheryl Mattey, Tutor, Building Crafts College
Photography by Briony Campbell

Taking these key elements into account, the paper went on to describe a number of spectra within which individual makers or items of craft can be placed. This enabled the development of a clear set of guidelines on what constitutes Heritage Craft:

- "The initial focus should be on practice – intangible heritage skills. Product would be a secondary consideration – however, there must be a product. Within practice, initial categorisation would be by material used.
- Product could be fixed, portable, newly constructed product, or repair, restoration or conservation of an existing product. It is most likely to be functional, traditional in design and could be decorative, but should not be conceptually driven art.
- Whilst Heritage Crafts predominantly produce functional objects, they do include the applied arts or decorative crafts such as lace making, calligraphy and marquetry – crafts that are concerned with making functional objects beautiful.
- The level of hand skill and the knowledge of and the depth of engagement with materials is more important in identifying the boundary between craft and industry than scale of production.
- The context of craft making is important if it is supporting or is practised as part of a heritage building or environment – whether urban or rural.
- Using the UNESCO categories of intangible heritage and focussing on traditional craftsmanship would exclude culinary craft, which is defined as social practice.
- All forms of Heritage Craft should be encompassed by the research including the heritage practice of recent immigrants."

The paper also noted that, "…Heritage practice can include for profit and for pleasure or voluntary activity". However, given the imperative of this study to consider economic impact, "…the former is more important for the purposes of this research so will be the prime focus of measurement."

2.2.1 Detailing the constituent parts of the definition

Building on Towards a Definition of Heritage Craft, the next stage was to develop a detailed definition of the activities to be included. These needed to be both meaningful to the sector and measurable quantitatively.

In order to satisfy this requirement, the research employs a two-tier definition:

1. A "paper" definition: a listing of the various practices that could be considered to be Heritage Craft, providing specific detail on the nature of the activities and products/outputs/services. This described in detail the materials and practices used and the products/services created and/or delivered.
2. A "measured" definition: an aggregation of the detailed paper listing, bringing together practices into manageable groups of activity in order that they could be measured. With this in mind, whilst the makeup of the subgroups takes the paper definition as its starting point, the actual definition is driven by the method. The following chapter of the report goes on to describe the methodology in more detail.

The remainder of this report focusses on the second of these. However, the full paper definition is available as an annexe to this document.

In beginning to compile a list of practices, it immediately became clear that, as so many are material specific, it made sense to use a definition that:

- has a primary type designated by the use of a particular material, or the production of a composite item
- allocates materials/composites into a series of subgroups, according to the type of item produced or process undertaken.

Beth Gilmour, Jewellery Designer
Photography by Briony Campbell

As such, the final definition used by the research was as follows:

Type	Group	Subgroup
Composite	Guns	Gunsmithing
	Instruments	Making and restoring clocks and barometers
		Making and restoring musical instruments
	Jewellery	Jewellery making
	Toys & automata	Toys & automata
	Vehicles	Vehicle manufacture and restoration – boat
		Vehicle manufacture and restoration – cars
Material	Animal	Equine leather
		Leather clothing and accessories
		Leather luggage
		Leather preparation
		Making, restoring and conserving other leather objects
		Taxidermy
	Clay	Clay construction, building, restoration and conservation
		Making, finishing, restoring and conserving clay objects
		Tile installation
		Tile making
	Glass	Decoration, e.g. engraving, painting
		Glass construction, building, restoration and conservation
		Making, fabrication and restoration of glass objects
		Stained glass
	Metal	Architectural metalwork
		Blacksmiths and forgers
		Decorative and ornamental metalwork
		Fabricated metalwork
		Farriers
		Foundries
		Hand tools, e.g. knives, cutlery
		Leadwork
		Wrought iron
	Paint	Decoration
	Paper	Calligraphy and illumination
		Papermaking and paper shaping
		Printing, pressing and bookbinding
	Plaster	Plastering
	Precious metals	Engraving and finishing
		Goldsmithing and silversmithing

Type	Group	Subgroup
Material	Stone	Bricklaying
		Carving and letter cutting
		Stonemasonry
	Textiles	Making, restoring and conserving clothing and accessories
		Making, restoring and conserving furnishings
		Making, restoring and conserving other textiles, e.g. felt, sails, nets, ropes
		Making, restoring and conserving textile products
		Spinning, weaving and dyeing
		Tailoring and dressmaking
	Wood & plant	Antique restoration and repair
		Basketry
		Brooms and brushes
		Carpenters and joiners
		Furniture and cabinet makers
		Furniture and cabinet repair/restoration
		Ladder manufacturer
		Making and finishing other wooden objects
		Picture framing and restoration
		Sculptors and wood carvers
		Thatching
		Woodturning

This means there are 16 groups of materials and composites in the Heritage Craft definition, and 58 subgroups related to individual areas of activity. Taking into account the variation in activities across the groups, and for the purpose of having a single summary of the definition, the following overarching statement was developed:

[Heritage Craft includes] practices which employ manual dexterity and skill and an understanding of traditional materials, designs and techniques in order to make, repair, restore or conserve buildings, other structures, modes of transport, or more general, portable objects.

Each subgroup represents occupations and business activities associated with its description. For example, an upholsterer would be included in the Making, restoring and conserving furnishings subgroup, a glass blower would be in the Making, fabrication and restoration of glass objects subgroup and so on. Further detail on the activities of businesses in each group is available from the survey, which collected a range of information about the practices and techniques used by the responding organisations. This is available in the appendix (page 110).

Metho

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Methodology

3 Methodology

As noted in the introduction, a lack of economic data on the Heritage Craft sector presented the need to conduct this research. The gap in data has been driven by the lack of a clear sector definition (as discussed in Chapter 2), responsibility for the development and delivery of support for the sector falling across different organisations and agencies, and the absence of a straightforward way to measure the footprint of the Heritage Craft sector.

This chapter of the report deals specifically with the last of these challenges and provides an overview of the methodology developed to map the size of the sector, before moving on to provide details on the approach taken in other elements of the research – specifically the qualitative consultation and the supply mapping.

An expanded version of this chapter providing further technical detail on the methodology is available in the appendix (page 110).

3.1 Mapping the size of the sector

As shown in Chapter 2, Heritage Craft cuts across a number of industries/sectors and is typified by niche, often small-scale, activity. This presents a number of challenges:

- The standard sources of secondary data[8] used to measure other sectors are not appropriate because the Standard Industrial Classification/Standard Occupational Classification (SIC/SOC) systems are not detailed enough.[9]
- Many businesses are relatively informal and are combined with their proprietors' other paid employment or business activities. As such, they are often overlooked in secondary data sources/ databases.
- The nature of the sector is such that a high proportion of businesses are not visible in official data sources. For example, they do not pay VAT, or are not PAYE registered.
- While a variety of guilds, livery companies and societies exist, take-up of these is patchy and multiple memberships are possible and frequent. This means that it is not possible to use membership levels as an accurate measurement of sector/workforce size.

The complexity of the Heritage Craft footprint also means that these challenges are not consistent across the board, i.e. not every activity is subject to the same measurement challenges. However, it is possible to follow a methodology founded on the principle of utilising a number of analytical steps in order to generate the best estimate of the Heritage Craft population.

8 For example, Annual Business Survey (ABS), Business Register & Employment Survey (BRES), Annual Population Survey (APS), Labour Force Survey (LFS), the Inter-Departmental Business Register (IDBR).

9 However, it is important to note that this does not mean the SIC/SOCs are of no use – rather that they cannot be used alone.

The method for this research employed six main steps as follows:

1 Creating a master database of Heritage Craft makers, practitioners and businesses using data available from associations/guilds/membership bodies and online directories.
2 Utilising keyword searches on a business dataset[10] to identify Heritage Craft businesses and their economic activity.
3 Applying weights to this "known universe" of businesses and makers to scale this up to a population estimate.
4 Undertaking a survey of 762 Heritage Craft businesses, and then weighting survey results to the population in order to deliver specific data on the nature of activity, business performance and needs.
5 SIC-based data (from ONS data sources) to model data on GVA and workforce demographics.
6 Using historic trend data on employment and standard econometric forecasts of anticipated performance in order to estimate a likely future employment footprint.

It would not be possible to just use the database developed through executing steps 1 and 2 to complete the analysis because, for some activities, even though businesses can be identified, there is limited information about exactly what it does. This means there can be a level of uncertainty regarding the extent to which it is actually engaged in Heritage Craft activity. For example, a business operating in the Plaster group might simply describe its activity as "plastering services", which provides no information as to whether or not the services are relevant to this study. In addition, the database will not capture "missing" businesses that are not registered with a guild, do not have a web presence or are not on TBR's own dataset, Trends Central Resource (TCR).

For these reasons, there was a need to: a) speak to businesses in order to validate whether or not they are engaged in Heritage Craft activity; and b) estimate the number of missing businesses in order to create a valid population estimate.

The latter was undertaken using the principles of an approach developed by TBR and applied to its own dataset to estimate the number of businesses operating across the whole of the UK. The approach draws on the BIS Small and Medium Enterprise (SME) statistics – the only statistics available that attempt to cover the whole of the economy. Specific details on this are available in the more detailed methodology in appendix (page 110).

In order to speak to businesses, a two-stage telephone survey was undertaken with a representative sample of businesses. The two stages were as follows:

1 A series of questions to validate Heritage Craft activity/relevance to the study. In order to be considered relevant, a business must be making money from the craft, use hand tools and/or execute skilled, part-automated processes and create items that are functional, traditional in design and/or decorative – but are not conceptually driven art.[11]

2 For those businesses engaged in Heritage Crafts, a series of questions about the nature of business activities, employees, markets and revenue, education and training provided/undertaken, and the future prospects of the business.

In total, 2,478 businesses participated in the survey, with 762 participating in both stages one and two.

10 The dataset used for the research was Trends Central Resource. For more information see http://www.tbr.co.uk/pages/tbr-observatory/tcr-database.php
11 The respondent may combine conceptual art with one of the other three activities, but it must not be their sole activity.


David Allison, Metal Spinner
Photography by Robin Wood/Heritage Crafts Association

“762 Heritage Craft businesses were surveyed during the data gathering phase of the research.”

A challenge presented by stage one of the survey was that some businesses might fulfil these criteria, but still not be truly considered to be Heritage Craft. This was particularly the case in the crafts that are construction trades, such as carpentry and joinery, plastering, painting, glazing, etc. One argument is that however these skills are applied, the crafts are fundamentally Heritage. However, because of the variability in the application of skill, it was decided for the purpose of this research that it was important to verify the intent of these businesses with regard to Heritage Craft activity, i.e. is some or all of the business activity specifically Heritage in its intent or application? For this reason, all construction-related categories were first screened to determine the business intent.

When designing the questionnaire to be used in the survey, the decision was taken not to include questions on the demographic characteristics of employees (age, gender, ethnicity, skills profile). Instead, trend data was drawn from the Annual Population Survey (APS) and applied to final population figures in order to estimate the demographic profile of the workforce.

A similar process was undertaken in order to provide an estimate of GVA. Data from the Annual Business Survey (ABS) that describes the relationship between turnover and GVA by SIC was used to calculate for every pound sterling of turnover the pounds sterling that are delivered in GVA. This ratio was then applied to the turnover data generated from the survey.

It is important to note that in both of these approaches, the figures quoted are not drawn from the APS or ABS; rather the trends from these data sets are used to model the data gained through the survey.

A list of the best-fit SICs used for the GVA calculation and the workforce demographics is available in the appendix (chapter 8.5, page 134).

Finally, in order to deliver estimates on future levels of employment, an econometric model was developed, drawing on historical data on employment change in Heritage Craft businesses between 1999 and 2009.

3.2 Qualitative consultation

Recognising that numbers alone often only tell half a story, the research incorporated a series of 22 in-depth semi-structured interviews with Heritage Craft businesses.

Given the number of different groups and subgroups operating in the sector, it was not possible to undertake interviews across them all. As such, they were conducted in sets in order to deliver case study information illustrating the reality of the sector's ecology and business, and to consider perceptions of its present and anticipated future prosperity.

Interviews were undertaken in the following groups:

- Stone, which predicted the highest increase in employment.
- Instruments, which predicted the second highest decrease in employment.
- Guns, which has the highest Heritage Craft GVA per head and predicted an increase in employment.
- Wood & plant – one of the largest groups, which predicted a decrease in employment.

The topic guide for the interviews is provided in the appendix (chapter 8.4, page 132).

3.3 Mapping supply

In order to gain an understanding of the training provision offered by or through Heritage Craft guilds, a content analysis of their websites was undertaken. The content analysis considers the different types of training and education offered via the website and the level of engagement the guilds have with training delivery.

To develop an understanding of the supply of formal apprenticeships within the sector, data was obtained from the National Apprenticeship Service website, using the apprenticeship search engine to identify Heritage Craft apprenticeships that are currently advertised as vacant. Further data from the National Apprenticeship Service on the number of people starting and achieving apprenticeships over the last ten years was obtained from the data.gov.uk website.

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Demand for Heritage Craft Skills and Knowledge

4 Demand for Heritage Craft Skills and Knowledge

4.1 The size of the sector and its workforce

Overall, the Heritage Craft sector employs a workforce of 209,390 people; this includes all individuals employed in Heritage Craft businesses regardless of their occupation.

A total of 169,550 (81%) of these employees use Heritage Craft skills and knowledge for the majority of their working time (Heritage Craft Emp in the table below).

There is a variation across the different craft groups with regard to the proportion of people using Heritage Craft skills and knowledge. Paint and Plaster groups state that more than 90% of their workforce use Heritage Craft skills and knowledge intensively, compared to approximately 70% in Animal and Jewellery. The lowest figure is in Clay, (49%) driven by low levels of employment of Heritage Craft skills in Clay construction, building, restoration and conservation businesses. In terms of volume, Paint and Wood & plant have the most Heritage Craft employment (37,210 and 30,710 respectively), while Jewellery and Toys & automata are the two smallest groups contributing to the total (300 and 210 respectively).

Table 5: Heritage Craft firms and employment

Group	Firms	Total Emp	Heritage Craft Emp	% Heritage Craft Emp	Avg Heritage Craft emp per firm*
Paint	21,460	40,990	37,210	91%	1.7
Wood & plant	16,400	34,710	30,710	88%	1.9
Metal	7,140	30,110	23,030	76%	3.2
Textiles	7,970	25,710	20,640	80%	2.6
Clay	4,370	16,550	8,100	49%	1.9
Plaster	11,460	15,600	14,760	95%	1.3
Glass	4,570	9,460	7,230	76%	1.6
Animal	1,030	8,790	6,210	71%	6.0
Stone	2,490	8,470	6,690	79%	2.7
Paper	1,670	7,900	6,160	78%	3.7
Instruments	2,130	3,730	2,910	78%	1.4
Precious metals	1,010	2,560	2,060	80%	2.0
Vehicles	900	2,530	2,010	79%	2.2
Guns	660	1,580	1,320	84%	2.0
Jewellery	120	450	300	67%	2.5
Toys & automata	100	250	210	84%	2.1
Total	**83,490**	**209,390**	**169,550**	**81%**	**2.0**

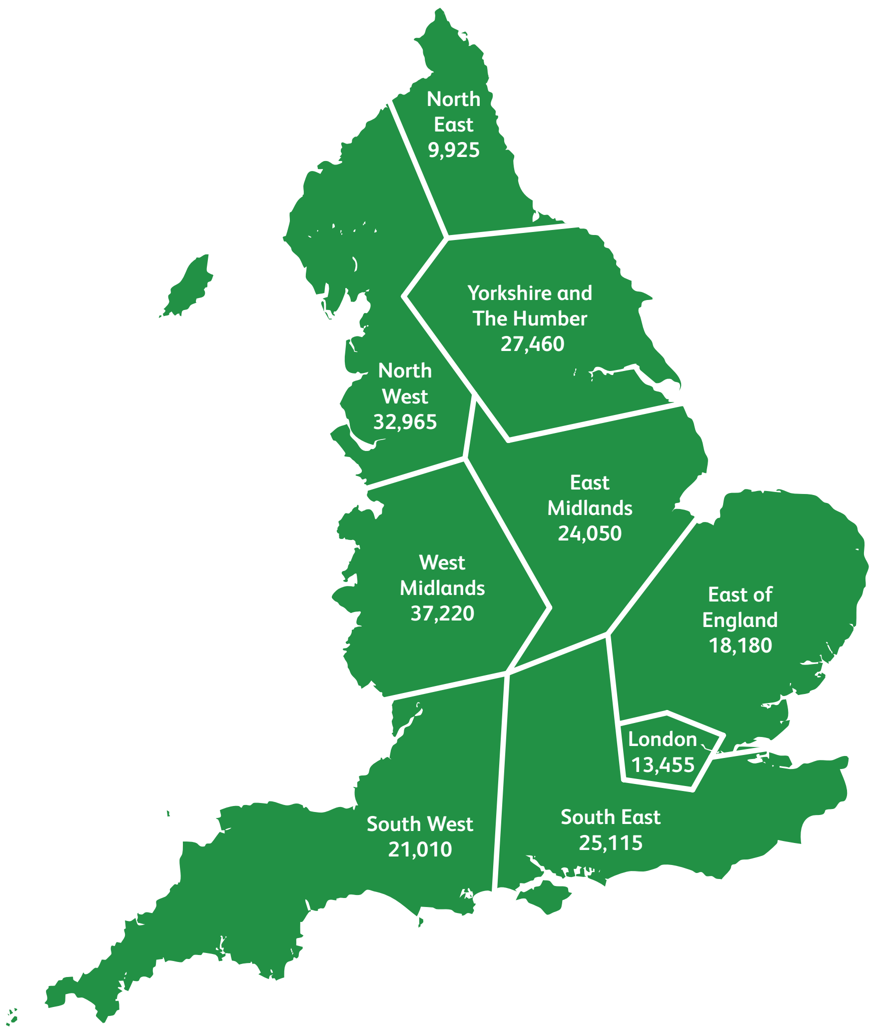
Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/S2) * Heritage Craft Emp/Firms

The number of people employed in each firm using Heritage Craft skills for the majority of their working time varies across groups, with businesses in the Animal group tending to employ the most Heritage Craft workers. Paper, Metal and Stone all also employ an above average number of Heritage Craft workers. The businesses in Plaster and Instruments tend to have the smallest average employment, suggesting a high degree of self-employment in these groups, which is explored in Chapter 4.

4.1.1 The regional distribution of the workforce

The West Midlands has the highest absolute number of Heritage Craft workers, with 37,220 of the workforce being employed in this region, followed by the North West with 32,965. There is a significant gap between these and the next highest employer, Yorkshire and the Humber, with 27,460 employees.

Figure 1: Total employment across the regions



Source: Heritage Craft Mapping Survey 2012 and Annual Population Survey 2011 (TBR Ref: W2/S1aR)

Nationally, the Heritage Craft sector accounts for 0.9% of the total English workforce.

Table 6 considers the distribution of employment across the regions by Heritage Craft groups. It also shows the proportion of the total workforce in the region that Heritage Craft accounts for. Nationally, the Heritage Craft sector accounts for 0.9% of the total English workforce. The largest variation from this is the West Midlands, where 1.6% of the total regional workforce is employed in Heritage Craft.

Table 6: Regional distribution of workforce

Group	North East	North West	Yorks & Humber	East Midlands	West Midlands	East of England	London	South East	South West	England
Animal	80	985	365	2,995	1,110	760	785	695	1,020	8,790
Clay	995	2,635	2,235	1,405	4,795	745	575	1,405	1,760	16,550
Glass	545	1,170	860	990	1,250	1,210	1,000	1,440	1,000	9,465
Guns	30	235	285	125	300	140	70	225	160	1,580
Instruments	65	280	375	425	330	560	620	780	300	3,735
Jewellery	5	15	55	40	70	20	95	110	40	450
Metal	1,565	4,525	4,170	2,985	7,500	2,700	1,185	2,910	2,575	30,110
Paint	2,135	6,005	5,530	4,610	4,330	4,245	3,575	6,630	3,925	40,985
Paper	195	1,595	945	960	630	955	445	1,405	770	7,895
Plaster	1,205	2,055	1,860	1,655	1,525	2,215	1,290	2,265	1,535	15,595
Precious metals	45	230	285	140	515	245	535	320	245	2,560
Stone	270	1,565	660	945	545	1,635	430	1,590	830	8,470
Textiles	740	6,145	4,645	5,110	2,260	1,500	2,105	1,410	1,790	25,710
Toys & automata	5	60	15	25	20	15	25	45	40	245
Vehicles	95	235	90	385	375	185	125	725	315	2,530
Wood & plant	1,040	5,080	4,855	3,405	3,670	4,010	2,720	5,650	4,280	34,710
Heritage Craft	9,925	32,965	27,460	24,050	37,220	18,180	13,455	25,115	21,010	209,385*
% Distribution	**5%**	**16%**	**13%**	**11%**	**18%**	**9%**	**6%**	**12%**	**10%**	**100%**
Heritage Craft as proportion of total England workforce[12]	**0.9%**	**1.1%**	**1.2%**	**1.2%**	**1.6%**	**0.7%**	**0.4%**	**0.6%**	**0.8%**	**0.9%**

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W2/S1aR) * Variance to Table 5 due to rounding

12 Using 2011 data from the Annual Population survey, which puts the England workforce total at 24.1m

Key features of the regional distribution of employment are:

- Glass tends to be relatively evenly distributed across regions. With the exception of the North East (which has 545 employees), all other regions range between approximately 900 and 1,500 employees. Although the absolute numbers vary, the same pattern is replicated in Paint, Plaster and Wood & plant.
- The Animal, Clay and Vehicles groups show the most extreme examples of employees being clustered in one region, with the East Midlands, West Midlands and South East respectively accounting for a significant amount of employment for each group.
- The West Midlands is home to some of the highest numbers of employees in four groups: Clay, Metal, Precious metals and Guns – the latter three groups clearly showing a focus on the availability of local materials.
- The South East and the North West appear to be strong locations for a number of different groups. These are often not the most significant in terms of the highest level of absolute employment; rather the region hosts a large number of employees from across various groups. The North West: Textiles, Toys & automata, Paper, Stone, Metal and Guns. The South East: Vehicles, Jewellery, Toys & automata, Instruments, Stone, Paper and Guns.
- There is a cluster of activity in the Instruments group in south eastern England, incorporating London, the South East and East of England, with half of all employees in the group working in these three regions.
- The North East and the South West stand out as not hosting a majority of employment in any single group. The South West is home to the second largest number of employees in the Vehicles group, but the tendency is more for the region to sustain a relatively similar proportion of employment across each group. Excluding Vehicles, the range is no more than 5%, from 7% of total employment in Textiles to 12% in the Animal group. The largest concentration of any group in the North East is Plaster, with 8% of employment from that group in this region. However, with the exception of Metal, the North East consistently employs the smallest absolute number of people in each group (London employs the smallest number in Metal).
- Links to broader industrial concentrations are evident; for example, the higher number of Textiles employees in the North West, East Midlands and Yorkshire and the Humber, and Metal in the West Midlands and Yorkshire and the Humber.

Gunsmithing in the West Midlands

The history of the gun trade in Birmingham dates back to the late 16th century. Its development was made possible by its system of turnpikes and canals, enabling the city to import raw materials and export small manufactured goods, including small arms.

Gun manufacture in the West Midlands depended on the coal and iron ore deposits of the Black Country, and the conversion of watermills (which had previously been used to grind corn) to industrial processes.

Birmingham had already supplied 15,000 swords to the Roundheads during the English Civil War, and, by the late 17th century, began supplying the British Government with small arms to use against the French in the War of the League of Augsburg. In the early 19th century, the city's gun manufacturing was dominated by the Government and the East India Company's procurements for the Napoleonic Wars, when 1.9 million guns were produced by 125 firms – two-thirds of all the guns used by the British Army. By the second half of the 18th century, the city was said to be the "foremost arms producer in the world". It supplied both the Crimean War and the American Civil War, the Confederates in particular, when an estimated 800,000 weapons were shipped to the States. In the 20th century, the government turned to Birmingham for arms manufacture to support the First World War.

Gun manufacture in the West Midlands has always been collaborative; locks and components were traditionally subcontracted from Black Country producers. The barrel makers were located in Aston, Deritend, Smethwick and West Bromwich, where water powered their boring and grinding machines. Showell's Dictionary of Birmingham (1885) lists around 60 specialist trades involved in gun manufacture.[13] In 1851, the trade is said to have employed 2,867 people, over one-third of the total (7,731) workforce in England and Wales. By 1868, there were 578 gun firms in the city.

The Proof House, which opened in 1813, was established by Act of Parliament at the request and expense of the trade itself[14]. It independently tests the weapons produced and ensures their safety and standard of workmanship. It is still used and is one of only two such proof houses in England. A report of 1883 accounted for over half a million of barrels being proved annually.[15]

Birmingham's Gun Quarter is still associated with the manufacture of firearms. But, due to the UK's severely restrictive laws regarding gun ownership, including sporting arms, there is only a small commercial market for firearms in the UK. According to one gun trade interviewee:

"There are only 12 left in the gun quarter. When I joined there were 30-40. They've all died or retired. There's only one man here younger than me; he works with his dad."

This is reinforced by the data later in the report, which shows that 40% of new entrants to the sector are aged 35-49.

The current UK perception toward guns is an issue for this group. In 2011, Birmingham sought to rename the Gun Quarter because of its association with firearms and gun crime.

13 http://www.gutenberg.org/files/14472/14472-h/14472-h.htm
14 http://www.gunproof.com/
15 http://www.gutenberg.org/files/14472/14472-h/14472-h.htm

4.2 The nature of employment and the characteristics of the workforce

4.2.1 Nature of employment

This chapter considers the ways in which businesses operating in the sector manage their workforce, focussing on the different forms of employment.

78% of the workforce works independently/is self-employed (i.e. is employed in a firm with only one employee – themselves). This is a striking comparison to the national average figure for self-employment, which is 14% of the workforce in England.

Across the sector, workers tend to be employed in micro-businesses, with 96% of people in firms with 10 employees or fewer. This figure is driven by the fact that 78% of the workforce works independently/is self-employed (i.e. is employed in a firm with only one employee – themselves). This is a striking comparison to the national average figure for self-employment, which is 14% of the workforce in England[16].

As might be expected, the proportion of self-employment varies. For example, 94% of those working mainly in Taxidermy are self-employed, compared to 34% in Leather.

Table 7: Work type and self-employment

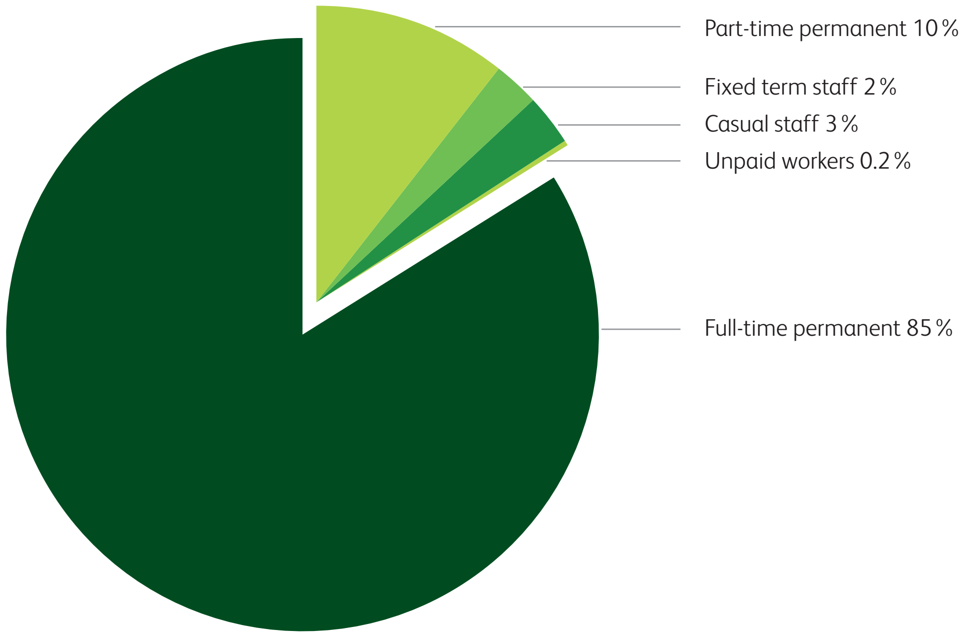
Group	% of workforce self-employed
Taxidermy	94%
Plaster	91%
Clay	85%
Clocks and barometers	84%
Musical instruments	84%
Paint	84%
Glass	80%
Wood & plant	79%
Heritage Craft average self-employment	**78%**
Metal	70%
Precious metals	67%
Guns	65%
Textiles	65%
Stone	64%
Boats	61%
Cars	61%
Paper	61%
Toys & automata	60%
Jewellery	43%
Leather	34%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4)

16 Annual Population Survey 2011

Figure 2 below presents an overview of the types of employment contract used by businesses across the sector, specifically for employees who use Heritage Craft skills and knowledge for the majority of their working time. The majority of the workforce (84%) is employed on a permanent, full-time basis.[17]

Figure 2: Breakdown of workforce using Heritage Craft skills and knowledge for majority of working time by type of employment



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W7/C3)

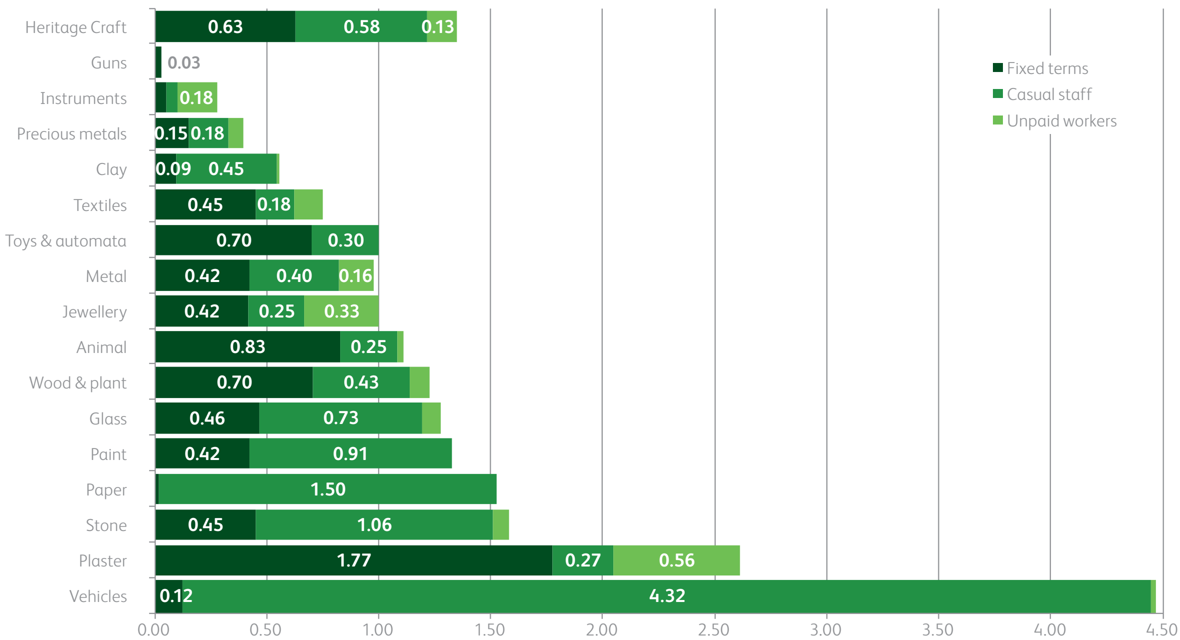
Of the remaining 16%, 10.6% of these are also permanently employed with only 5.4% of employees operating on a non-permanent contract. This pattern is reflected across the total employment footprint (i.e. all staff regardless of amount of time spent using Heritage Craft skills and knowledge) with minor differences.[18]

Although a small part of the current workforce, the survey also gathered data on the total number of additional non-permanent workers (fixed-term staff[19], casual staff[20] and unpaid workers undertaking any work, not specifically Heritage Craft activity) a business might call upon in a given year. Figure 3 below shows that Heritage Craft businesses call upon an average of 1.3 additional workers (on top of those currently working with this business) per firm in a given year.

There is very little difference between whether these additional workers would be given a fixed-term contract or be employed for an undetermined period on a casual basis. However, it is less likely that they would work on an unpaid basis. As might be anticipated, this varies by group, with Guns being the least likely to call upon any additional labour, and Vehicles calling upon an average of up to approximately 4.5 additional staff. There is, however, a consistent trend not to use unpaid workers.

17 Self-employed sole traders would be included in this category of permanent employees, but could be employed full or part time in their business.
18 In the total footprint, 86% are permanent full time, 9% permanent part time, 3% fixed term, 2% casual and 0.3% unpaid.
19 For this research, "fixed term" was defined for survey respondents as meaning any employee whose employment has a defined end point.
20 For this research, "casual worker" was defined for survey respondents as meaning any employee whose employment is not formally contracted or who is on a zero-hours contract.

Figure 3: Average number of additional workers per firm, per year



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W07/C4)

Scaling these figures up, it is possible that, at any one time, up to 112,530 additional people could be working in the sector[21]:

- 52,460 people on fixed-term contracts.
- 48,830 people working on a casual basis.
- 11,240 people working on an unpaid basis.

This tendency towards self-employment and somewhat limited used of temporary employment contracts was reflected in the in-depth interviews where there was a general reluctance to employ people. Whilst several referred to having employed people in the past, in general, it was unlikely that they would do so again in the future. This was partly a matter of succession, but costs were also a major inhibitor – exacerbated by the current state of the economy:

"We used to have eight or nine more people working for us. But the more people we employed, the less money we had. Other companies have gone [bust] because of all the on-costs…public liability and vehicle insurance, and the Hire Purchase costs on the van…" – Stone interviewee

"Large jobs need a lot of…work. We can't take those on the basis of employing a lot of labour and then sit around, waiting for more work to come in." – Stone interviewee

It should be noted that both the Guns and Stones trade are predicted to increase employment (see Table 28), the interviews may point to a more nuanced view that depends on where the business is based – and, in the case of Stone, the type of business and market.

Where casual employees were used, they tended to be family members. Interviewees were wary of training the competition by offering temporary employment while they were still active in the business themselves (which is reflected again later in the report with reference to the legacy of Heritage Craft). Consequently, the default for many small businesses is to work collaboratively with other businesses, building a network of other self-employed craftspeople or businesses into a flexible team. However, whilst the pooling of resources from a group of businesses does make the whole greater than the sum of its parts, by definition, being a sole trader limits those companies' capacities. This includes the scale of work that practitioners can take on and constrains their potential turnovers:

21 These people could be in any role, not necessarily those specifically using Heritage Craft skills and knowledge

"I have six to eight people that I use – a cabinet maker, an enamel dial restorer, a painted dial restorer, a watch repairer for fine mechanisms, a metal gilder, a bevelled glass maker who bends glass (e.g. for domes) and a company that does casting work for the antiques trade. I can send off a handle and they'll replicate it… They also have a catalogue." – Clocks/antiques interviewee

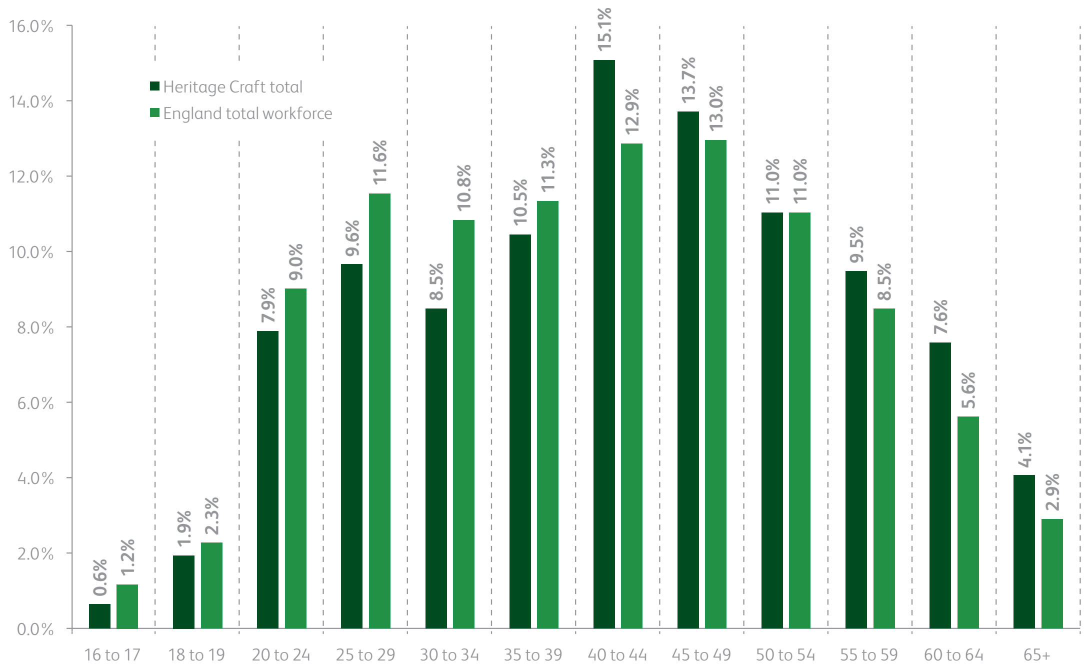
"I use subcontractors on larger projects [all Wood & plant]… This all works well as they all have their own businesses and I don't get involved in PAYE." – Wood & plant interviewees

4.2.2 Workforce characteristics

4.2.2.1 Age

As shown in Figure 4 below, the largest age bands in the Heritage Craft sector are 40-44 and 45-49 (approximately 30% employees). Only 10.5% of employees are aged 24 or younger. Comparing this profile with the average for the total workforce in England highlights this issue of an older workforce. A greater proportion than average of the Heritage Craft workforce is aged 60+ (11.6% compared to 8.5%) and a smaller proportion is aged below 34 (28.6% compared to 34.8%).

Figure 4: Age of Heritage Craft workforce, compared to national average



Source: Annual Population Survey 2011 (TBR Ref: W2: C4)

The loss incurred through retirement is not being compensated for by young people entering Heritage Craft trades at entry level. An upholsterer who was interviewed pointed to the number of his peers who were disappearing from the business:

"I started in 1995 and at that time there were five pages of upholsterers in Yellow Pages. Now there is one column. A lot of old boys have retired."

The general consensus amongst interviewees was that the younger generation seems to have no interest in Heritage Craft and does not want "to get their hands dirty". This is put down to various factors: the absence of practical skills training at school; the fact that the younger generation prefer to buy new and "don't value old things, or get things repaired"; a fundamental lack of appeal:

"Young lads aren't inspired by the romantic aspect of it – getting their hands dirty, or standing at a vice all day. It doesn't look sexy to a 16- or 17-year-old." – Guns interviewee

More specifically, it is assumed that the disinclination to enter Heritage Crafts was attributable to the tension between the desire to earn money and the time necessary to acquire skills, in particularly since those skills will not necessarily guarantee a substantial income. The lack of status associated with learning a trade is also considered to be a disincentive.

"…The lads aren't earning any money when they're training… They know that they could be earning more if they were doing painting and plumbing. It's always been the case, but now that there's less employment about, it's becoming more of an issue." – Stone interviewee

"Modern apprentices…expect to run before they can walk. In my first year as an apprentice, I hardly did anything. I was the lowest of the low – then I got trusted to take on some minor things. Youngsters these days aren't prepared to work like that – but without it, they won't get a feeling for things." – Stone interviewee

4.2.2.2 Ethnicity

The ethnic diversity of the Heritage Craft sector is limited, with 95% of the workforce being white and the data showing some Heritage Craft groups only having employees of white ethnicity.[22] The sector is therefore much less ethnically diverse than the rest of the economy, the average for England's total workforce being 90% white.

However, there are groups with a higher degree of ethnicity in their workforce, which include Textiles, Instruments and Guns. In Textiles, 18% of the workforce is from a Black, Asian or Minority Ethnic (BAME) background, with Instruments and Guns 14% and 12% respectively.

Table 8: Workforce ethnicity by group

Group	Total	% workforce BAME
Textiles	82%	18%
Instruments	86%	14%
Guns	88%	12%
Glass	93%	7%
Animal	94%	6%
Paper	95%	5%
Paint	96%	4%
Wood & plant	96%	4%
Clay	96%	4%
Heritage Craft	**95%**	**5%**
Stone	97%	3%
Metal	99%	1%
Vehicles	100%	0%
Precious metals	100%	0%
Jewellery	100%	0%
Plaster	100%	0%
Toys & automata	100%	0%

Source: Annual Population Survey 2011 (TBR Ref: W2/S5b)

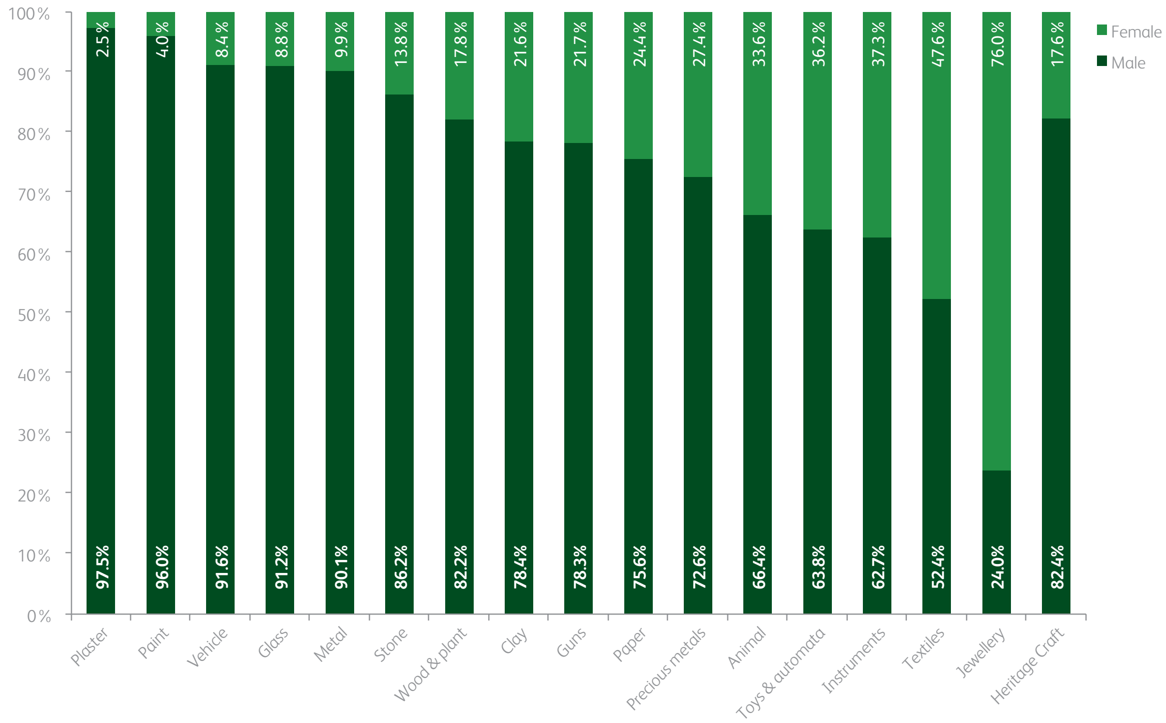
22 It is highly unlikely that the groups showing 0% ethnic minority employees actually do not employ any people from a BAME background. Rather, the sample size is likely to be so small that the figures have been suppressed by the Office for National Statistics.

Katie Barton, Designer – Maker
Photography by Briony Campbell

4.2.2.3 Gender

The workforce of the Heritage Craft sector is predominantly male: 83% are male and 17% are female. This is in stark contrast to the gender balance of England's workforce as a whole, which is 54% male, 46% female. Whilst there are some significant differences in the gender composition of the workforces in particular groups – for example, in the Jewellery group, 76% of the workforce is female, and in Textiles, 48% – most groups are dominated by male workers. This was very evident from the Guns and Stone in-depth interviewees, in particular where the only women interviewed or referred to were in administration.

Figure 5: Gender composition and work type



Source Annual Population Survey 2011 (TBR: W2/C3)

4.2.2.4 Skills profile

Just under three-quarters of the workforce (71%) have either no qualifications or a highest qualification up to NQF level 3 (equivalent to A-Level), with 33% of these people being qualified only to level 2. Following this, 13% of the workforce is qualified to level 5 (equivalent to a bachelors degree). However, it is interesting to note that a worker is more likely not to have any qualifications than to have a degree-level qualification.

Table 9: Workforce skills profile

Qualification level	Heritage Craft Total	% distribution	England total workforce % distribution
No Quals	29,695	14%	6%
Up to NQF level 2	68,735	33%	28%
NQF level 3	50,255	24%	21%
NQF level 4	7,160	3%	6%
NQF level 5	20,870	10%	20%
NQF level 6+	5,220	2%	10%
Other	23,250	11%	2%
Don't Know	4,200	2%	6%
Total	**209,385**	**100%**	**100%**

Source: Annual Population Survey 2011 (TBR Ref: W2/S7aR)

The skills profile in Heritage Crafts shows a number of differences to the skills profile across the total workforce in England. Heritage Craft workers are less likely to have a level 6+ (postgraduate) qualification (2% compared to 10% in England overall). They are also much more likely to have no qualifications or other qualifications (14% compared to 6%, and 11% compared to 2% respectively).

In-depth interviewees implicitly valued experience above qualifications. Several described coming into the business because it was a family tradition; one interviewee was the sixth generation of joiners in his family – something in which he took considerable pride. In general, their training was on the job; the learning process being about tacit knowledge exchange through showing and doing, rather than formalised teaching:

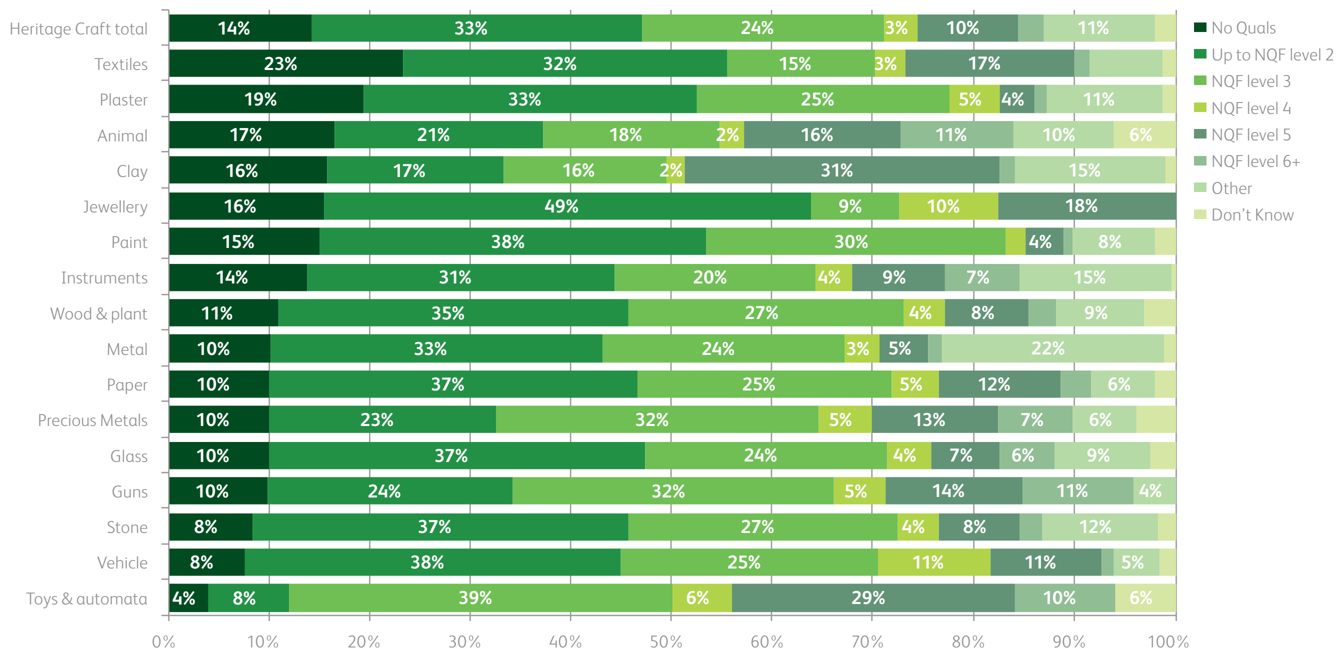
"I've spent 42 years repairing – that type of business you learn by doing and seeing. I started young with my father." – Instruments interviewee

Passing on those skills to the next generation was described in much the same way:

"My son started at 16 as an apprentice and learned the practice as well as theory. You need to be quite bright to do all the estimates, handle the clients, decide which stone to use, sort out the delivery, carve, and fix the stone, etc." – Stone interviewee

Figure 6 shows the distribution of skills across each Craft group, highlighting Toys & automata and Clay as having particularly different skills profiles. In both groups, the workforce is much more likely to have a degree-level qualification and much less likely to be qualified only to level 2. Clay is also amongst the groups with the highest level of workers with no qualifications. At the other end of the scale, Toys & automata has one of the largest proportions of workers qualified to level 6 or above (postgraduate).

Figure 6: Distribution of skills across the workforce by group



Source: Annual Population Survey 2011 (TBR Ref: W2/C6)

The likelihood is that, in many cases, Figure 6 reflects the availability of training, in which case the high proportion of many groups with other or no qualifications is perhaps of concern.[23] In the case of Clay, Textiles, Plaster and Metal, approximately one-third of the workforce falls into this group. Instruments and Animal also have just over a quarter of the workforce in this group. Textiles has the highest proportion of workers with no qualifications, accounting for 23% of the workforce.

23 It is also important to note that the skills profile is likely to be somewhat skewed by the pre-existing qualifications of people who enter the sector as a second career, which in many cases are likely not to be Heritage Craft related.

Claire Hoppit, Student, Building Crafts College
Photography by Briony Campbell

Quite apart from whether colleges were offering relevant Heritage Skills training, interviewees expressed some doubt as to how meaningful the qualifications that they offered were. One interviewee, the director of a Stone business employing ten people, used training to market his company's competences:

"We depend on quality, [since] work comes in by word of mouth and repeat business. All the lads do skills training at NVQ level 2 in façade maintenance, cleaning and repairs. I've just done a level 6 myself. This training is evidence of competence. …I've had some doubts about how useful it all is, but it seems to count in terms of getting Heritage work."

Aside from a concern about the potential for tokenistic training, a more general criticism from Heritage Craft practitioners was that the standard of work of young people leaving college is not necessarily guaranteed. Greater value is placed on experience than certificates:

"I sometimes take students from the college if I think they are up to the work. If they are not of a high enough standard, they become a liability." – Wood & plant interviewee

4.3 The economic value of the sector

4.3.1 Economic performance

Total turnover generated by the sector is £10.8 billion, with £5.5 billion being directly attributable to the Heritage Craft elements of the businesses.

Total turnover accounts for 0.3% of revenue generated by firms in England.[24] The turnover per firm generated by Heritage Craft activity is highly variable across the different groups. However, the average turnover per firm that is directly attributable to Heritage Craft is £65k. It should be noted that this is £12k below the VAT threshold.

Animal and Paper generate the most Heritage Craft turnover per firm, with both having a high total turnover and a large percentage directly attributable to Heritage Craft. Toys & automata and Precious metals have the highest percentage (92% and 87% respectively) of turnover being directly attributable to Heritage Craft.

Table 10: Turnover across the sector

Group	Firms	Total turnover	Turnover directly attributable to Heritage Craft activity	% Heritage Craft turnover	Average Heritage Craft turnover per firm
Animal	1,030	£482,802,420	£384,436,060	80%	£373,240
Paper	1,670	£552,255,170	£458,035,580	83%	£274,270
Precious metals	1,010	£190,198,670	£166,028,230	87%	£164,380
Metal	7,140	£2,206,303,620	£975,775,090	44%	£136,660
Guns	660	£179,944,220	£84,926,720	47%	£128,680
Stone	2,490	£646,808,380	£276,531,510	43%	£111,060
Textiles	7,970	£1,115,642,080	£855,006,230	77%	£107,280
Vehicles	900	£136,672,510	£75,384,960	55%	£83,760
Wood & plant	16,400	£1,740,756,980	£1,324,177,450	76%	£80,740
Toys & automata	100	£8,566,490	£7,896,780	92%	£78,970
Glass	4,570	£613,829,890	£263,537,840	43%	£57,670
Jewellery	120	£13,395,770	£5,896,320	44%	£49,140
Instruments	2,130	£127,567,530	£82,395,790	65%	£38,680
Clay	4,370	£1,178,538,050	£137,412,340	12%	£31,440
Plaster	11,460	£541,239,890	£166,740,390	31%	£14,550
Paint	21,460	£1,112,008,010	£217,082,530	20%	£10,120
Total	**83,490**	**£10,846,529,670**	**£5,481,263,810**	**51%**	**£65,650**

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/S3)

24 Using 2011 data from the Inter-Departmental Business Register, which puts total turnover in England at £3.9 trillion

Interviewees across the board tended to present themselves as having a vocation, rather than being financially motivated. They prized personal satisfaction and regarded financial targets pragmatically – needing to make enough to live on:

"I've never earned much. I'm 51 now and last year I had a profit of £16,000 – paltry for someone of my age. I've become accustomed to the price we get for our services." – Guns interviewee

"I don't have any financial targets [for the business] as such. Any financial targets that I do have are about a better standard of life than my [state] pension would allow for." – Guns interviewee

On reflection, some thought that they could have earned more, but were insecure about the effect of raising their prices. Others recognised the limitations to their potential to earn:

"Within the hand crafts, there is relatively little money to be made. Working by hand requires a high input of time. There's a limit to what you can charge per hour. It doesn't matter how many hours you put in – you only generate money when you're making something. So different years' incomes vary: you might take a week off, be ill, or things might just go badly. The same is true of all hand workers." – Guns interviewee

The combination of Heritage Craft work with other activities is common. In no single group does 100% of turnover come from Heritage Craft activity. This is not to say that no single business takes 100% of turnover from Heritage Craft activity, rather that this is rare. This was reflected in the in-depth interviews. At one end of the scale, Heritage Craft was a minority interest for one stonemason's business, accounting for only 15-20% of their turnover. At the other end of the scale, a gunmaker described his work as entirely based around Heritage Craft skills.

There are a few sectors where in excess of 80% of turnover comes directly from Heritage Craft. For example, in Toys & automata, whilst there are only a small number of businesses, these tend to focus almost exclusively on Heritage Craft. This is similarly the case in Precious metals, Paper, Animal and, to a certain extent, Wood & plant and Textiles. Correlating with this, these groups also have amongst the highest proportions of employees using Heritage Craft skills and knowledge for the majority of their working time.

With this in mind, one might expect that as the proportion of turnover generated from Heritage Craft activity reduces, so too does the proportion of the workforce that uses their Heritage Craft skills and knowledge for the majority of their working time. However, as shown in Figure 7 opposite, this is not necessarily the case.

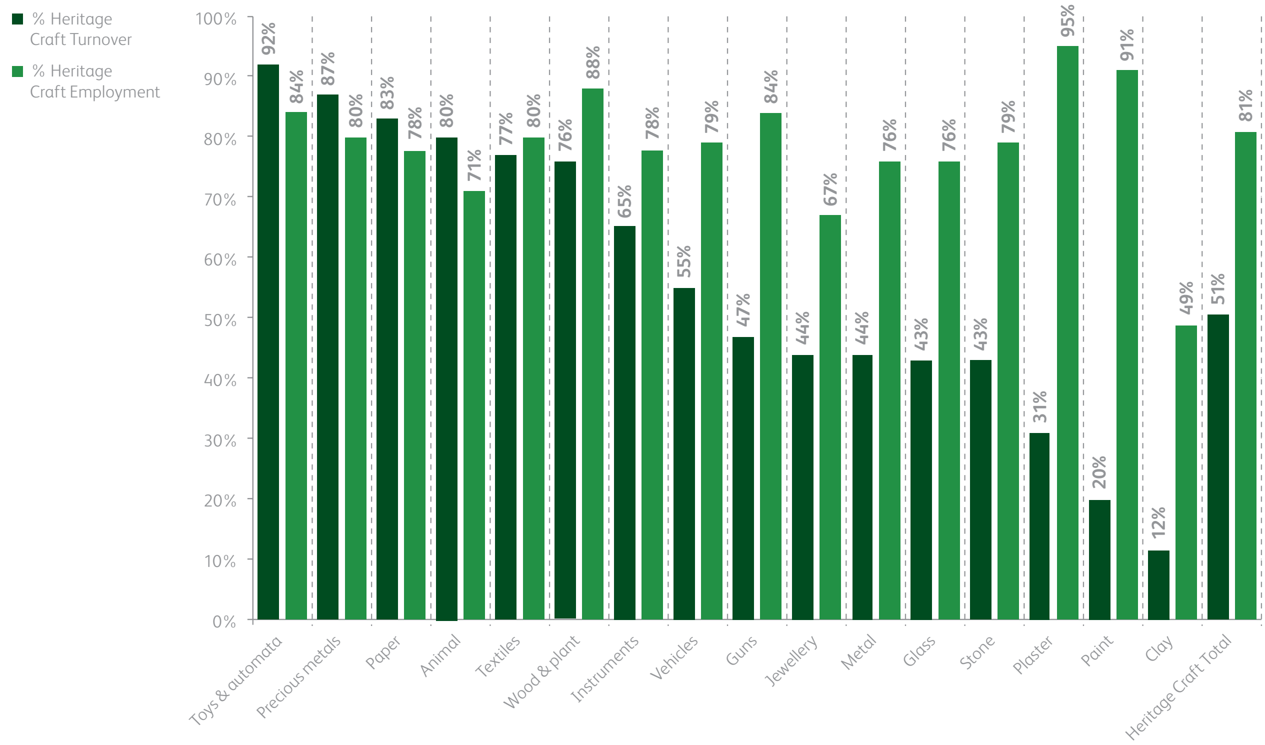
In fact, the proportion of workers using Heritage Craft skills for the majority of the time they are working is far greater in many groups than the proportion of turnover that is generated from Heritage Craft-specific work. This could suggest that the value of Heritage Craft-specific business is low compared to the amount of human resource required to deliver it, i.e. it takes a large number of workers to deliver a relatively low-value project/contract. Or, as is the case with the clock interviewees in the Instruments group, repair and restoration work is both labour intensive and slow relative to the money to be made, which is why they combine repair with retail.

"People are not willing to pay a fair rate for the job… They don't realise how many man hours are involved… I give people an estimate and they are shocked… [This is a] disposable society."

"As repair work is slow to carry out, I am not taking any more work till February/March 2013. However, retail is key for income and I need more retail."

Workers are also likely to be using their Heritage Craft skills and knowledge on a much wider range of work, beyond the scope of what is considered a Heritage Craft project/contract. For example, Paint and Plaster show the most extreme gaps between percentage Heritage Craft turnover and percentage Heritage Craft employment, and these groups are perhaps the most pertinent to fall into the category of having fundamentally "Heritage" skills, regardless of the nature of the contract in which they are applied. As such, whilst employees might be using Heritage Skills for the majority of their time, they may not be working on what is considered to be a Heritage contract.

Figure 7: Comparison of % Heritage Craft turnover and % Heritage Craft employees



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/C3)

Whether large numbers of workers are used to deliver relatively low-value projects/contracts) can be explored by considering GVA – a measure of the value generated once the cost of creating/delivering goods and services has been accounted for.

Across the sector as a whole, GVA is £4.4 billion, with £2.2 billion (50%) of this being directly attributable to the Heritage Craft activities of businesses. Total Heritage Craft GVA accounts for 0.6% of GVA generated by businesses across England.[25] Overall, Wood & plant has the highest Heritage Craft GVA (£519m) and has a high proportion of its total GVA as Heritage Craft GVA (76%). Jewellery has the lowest Heritage Craft GVA (£2.3m) and also a relatively low proportion of the total GVA being attributable to Heritage Craft activity (44%).

Across the sector as a whole, GVA is £4.4 billion, with £2.2 billion (50%) of this being directly attributable to the Heritage Craft activities of businesses.

GVA per head is more useful than total GVA when considering the relative value of goods and services across the sector, providing a view on the productivity of the workforce in each group. The higher the GVA per head, the fewer workers it is taking to deliver the value generated. The lower the GVA, the more workers it is taking to deliver the value the business is creating. GVA per head delivered by Heritage Craft employees working in the Heritage Craft aspects of the business is highly variable, ranging from £2.8k in Paint to £32k in Guns. The average for Heritage Craft employees is £12.8k. This compares to an average GVA per head in England of £30.9k.

Guns, Precious metals and Paper deliver the highest levels of GVA per head of the workforce, demonstrating that employers in this group are able to generate the most value from their Heritage Craft skills and knowledge.

25 Using 2011 data from the Annual Business Survey, which puts GVA in England at £7.4 trillion

Table 11: Gross value added across the sector

Group	Heritage Craft Emp	Total GVA	Heritage Craft GVA	% Heritage Craft GVA	Average Heritage Craft GVA per head
Wood & plant	30,710	£680,846,020	£519,110,600	76%	£16,900
Metal	23,030	£785,541,350	£368,842,500	47%	£16,020
Textiles	20,640	£408,957,460	£313,009,540	77%	£15,170
Paper	6,160	£219,621,480	£190,720,090	87%	£30,950
Animal	6,210	£151,797,360	£124,787,140	82%	£20,090
Stone	6,690	£256,200,660	£109,384,770	43%	£16,350
Paint	37,210	£546,847,780	£106,753,820	20%	£2,870
Glass	7,230	£264,022,380	£104,345,500	40%	£14,440
Plaster	14,760	£307,619,520	£94,768,700	31%	£6,420
Precious metals	2,060	£73,201,760	£63,888,010	87%	£30,960
Clay	8,100	£467,757,850	£55,692,220	12%	£6,870
Guns	1,320	£89,536,930	£42,257,970	47%	£32,000
Instruments	2,910	£59,777,320	£38,413,340	64%	£13,190
Vehicles	2,010	£58,304,970	£32,659,030	56%	£16,250
Toys & automata	210	£4,211,850	£3,882,570	92%	£18,460
Jewellery	300	£5,437,890	£2,393,560	44%	£7,990
Total	**169,550**	**£4,379,682,590**	**£2,170,909,350**	**50%**	**£12,800**

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/S4

Value in gunsmithing

Birmingham's gun trade has always depended on overseas sales. This may be truer now than it has ever been. Our research reveals that guns deliver the highest GVA per head of all the Heritage Crafts surveyed and also having one of the highest rates of international exports. Interviewees described relying on the export market for European luxury items, which includes cars and handmade guns in particular. Hotspots were identified as the Middle East, China and India.

"These days guns are very expensive – they take hundreds of hours to build. Therefore they can be seen as elitist. The trade tends to keep quiet about that. We don't talk about exports much either. I only survive by working for the US.

I'd only be able to scratch a living working for the UK market. The US has a different view of guns. It's perfectly OK to collect firearms. Some of the collectors are very wealthy and they can afford what we make. Often they're never even shot."

It appears that the increased rarity of hand-carved wood stocks is also reinforcing gunsmithing's position within an already niche market. The value attributed to these goods is synonymous with their being collectables:

"… As the market becomes more computerised and synthetic stocks proliferate…top range guns will be [made] of real wood, which will increase in value."

"…They're perceived as a piece of fine art – they represent what can be achieved by hand… The kind of thing that you'll find in royal collections... We go for the best quality to be found in the market."

The worth of these items is associated with a high level of craftsmanship and the investment of time:

"We're paid enough to produce things that take time... It's partly a function of the number of hours you devote – you'll be trying to reach as near to perfection as possible".

One of our interviewees, a gunmaker with overseas clientele, was fortunate to have secured enough work to cover the next two to three years:

"I could take on more, but I cherry pick what I want to do… I go for the more prestigious commissions and those that motivate me. I tend to leave the more mundane stuff. I look to do work that's unusual or to build guns that haven't been made for a couple of generations…"

In terms of this market, it could be argued that the gun trade punches way above its weight in terms of generating value:

"How many other self-employed people bring the sort of currency into the country that we do? I'm talking about new money. One customer alone has deposited £1.5m with me over the past decade. Sadly, it hasn't all gone to me, but my outworkers have been able to pay off their mortgages, sort out their kids, etc. on the back of the US trade that we've attracted".

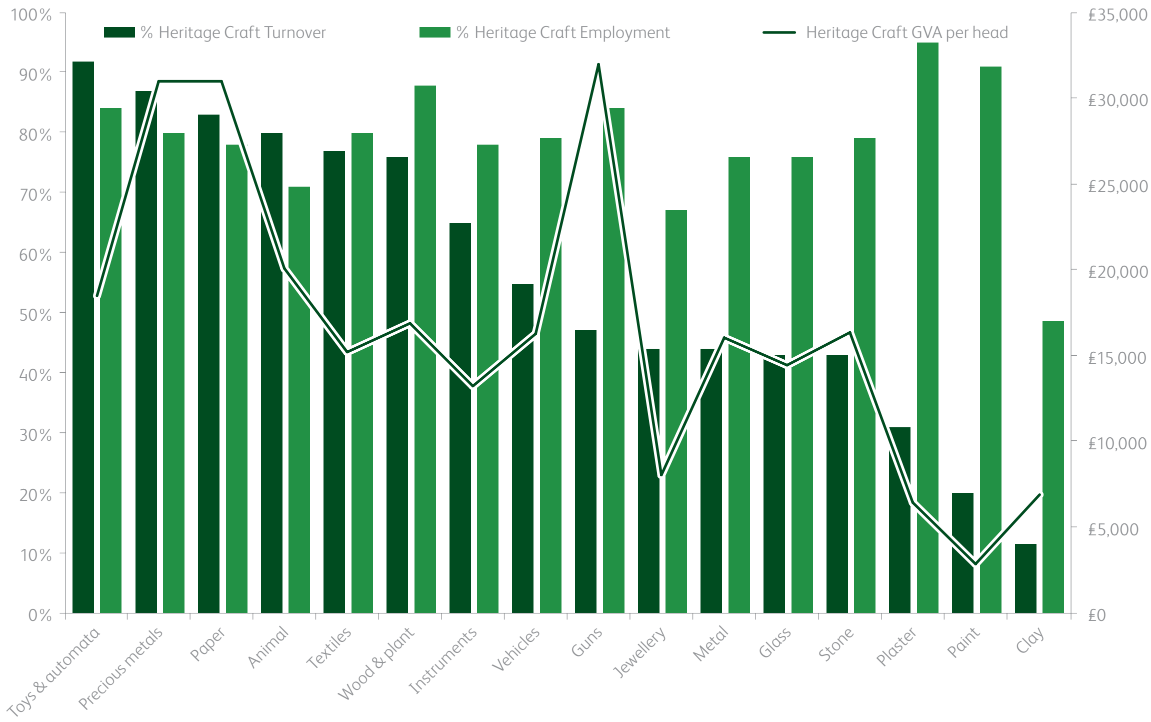
Other interviewees described a more modest but nonetheless buoyant market at home. In stark contrast to the luxury export market described above, the British gun market appears somewhat prosaic. Guns are said to be regarded as tools or "as a form of sporting equipment – like golf clubs". Interviewees' turnovers appeared to be based on the value of repair work. The fact that this has not dropped off was credited to the state of the economy:

"Like shoes, repair work has gone up. People are getting old ones repaired; they're less likely to change guns in this financial climate".

Returning to the question of whether, in some groups, it takes a large number of workers to deliver relatively low-value projects/contracts, this can be explored through examining whether groups with a high degree of Heritage Craft employment but a low proportion of Heritage Craft turnover also have low GVA per head.

Figure 8 below replicates the previous chart (Figure 7), but includes a line on a secondary axis to show GVA per head across the sector. Whilst there are some exceptions, most notably Guns, there is a perceptible downward trend in the GVA per head figures as the proportion of Heritage Craft turnover drops and is not matched by a drop in employment.

Figure 8: GVA per head compared to turnover and employment



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/C4)78888U

If all of these people are employed to deliver Heritage Craft work, then this would indeed suggest that, in some groups, a large number of workers are delivering relatively low-value projects/contracts. However, an important caveat to this analysis is that the Heritage Craft GVA per head is based on the assumption that Heritage Craft employees (i.e. those spending the majority of their working time using Heritage Craft skills and knowledge) deliver Heritage Craft GVA (i.e. GVA produced specifically from Heritage Craft activity). It may well be the case that not all such employees are always engaged in such projects, in which case the GVA per head figures would rise. Conversely, they might also drop further if non-Heritage Craft workers were also engaged in Heritage Craft projects.

An important consideration here is also the evidence from the interviews that, in some groups, customers often do not recognise the value of Heritage Craft skill in monetary terms, which naturally drives down the value of projects/contracts:

"Customers are not so interested in restoring old furniture and prefer to buy new from IKEA. There's a perception that old furniture isn't good, and people are less likely to commission as well. Restoration is labour intensive and involves a lot of hand skill, and people don't want to pay. I can remember people would pay to have a carver chair copied to make up a set. People don't have the money now. The removals side does sustain the restoration. At our peak, we had about eight people employed."
– Wood & plant interviewee

Photography by Briony Campbell

4.3.2 Selling and markets

Across the sector there are four key activities that businesses engage in to generate revenue:

- **Making/reproducing things:** where a new object or structure is created.
- **Repairing/maintaining things:** where repairing/maintaining means fixing an item in order to make it functional again, not specifically taking into account the original design and using modern materials alongside original materials.
- **Restoring things:** where restoring means returning something to a functional state, specifically taking into account the original design and using original materials.
- **Conserving things:** where conserving means maintaining something to secure its survival, countering deterioration, and preserving the object/building/structure's history and value to the greatest extent possible.

Businesses may do one, some, or all of the above. Table 12 below shows that approximately three-quarters of businesses provide goods/services that involve repairing/maintaining or restoring things, and half of businesses make/reproduce or conserve things. However, this profile of activity changes considerably when businesses are asked to specify the main activity undertaken. This brings making/reproducing and repairing/maintaining to the top of the list.

Table 12: Activities undertaken by businesses

Activity	% undertaking activity	% stating main activity
Making/reproducing	56%	38%
Repairing/maintaining	76%	35%
Restoring	71%	25%
Conserving	56%	1%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S5)

Only 1% of the sector undertakes conservation as its main activity. Taxidermists are most likely to be conserving something (16% identified conservation as their main activity), followed by businesses working with paper (6%) and guns (3%).

In terms of reaching the market, the majority of the Heritage Craft sector sells its products/services via word of mouth (73%), which 65% of businesses regard as the most important route in terms of the total value of sales.

This was echoed in a general consensus across in-depth interviewees; word of mouth is crucial for attracting business. Some had tried advertising but found it expensive and some had stopped once they had built up their client list. Other sales techniques mentioned included "good connections in the industry" (a form of word of mouth) and websites.

Whilst word of mouth was recognised as being "slower" and conceivably "unbusinesslike" in that "there's no planning; I just muddle through", generating "return business and existing customers recommending me" was the dominant ethos. This was exemplified by one Wood & plant interviewee for whom "the balance between new and repeat business is 50:50". The implication of interviewees' dependency on word of mouth is that quality is essential. In effect, you are only as good as your last job.

Table 13: Selling methods

Methods of selling	% using method*	% rating as most important in terms of total value of sales†
Word of mouth	73%	65%
Advertising through a directory	30%	4%
Online through own website	22%	4%
Advertising in printed press	13%	5%
Commissions from businesses/institutions	10%	7%
Direct to public	9%	4%
Online through a third party website	6%	3%
Through craft retailers/shops	4%	2%
Other	4%	1%
Through galleries or exhibitions	2%	0.5%
Commissions from general public	2%	1%
Advertising through a trade association/guild	2%	0.2%
Leaflets and other direct marketing	2%	1%
Repeat business	2%	1%
Through craft fairs	1%	0.4%
Direct to retailers who sell to the public on my behalf	1%	0.5%
Through others in supply chain	1%	0.4%
Through an agent	0.2%	0.2%
Trade fairs	0.2%	0.1%
Direct to businesses	0.2%	0.1%
Through street markets	0.2%	0.01%
Specific sales team	0.2%	0.2%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W1/S5)

* Total exceeds 100% as more than one method could be selected

† Sums to 100%, respondent required to select single most important in last year

The next two main methods used were advertising through a directory (30%) or online through own website (22%). However, these were rarely viewed as the most important methods for contributing to the total value of sales (4% each). There were a few exceptions to this amongst the interviewees. In one instance, a clock and antique restorer was attracting international customers through their website, which accounted for about a third of the business overall. The Wood & plant interviewee quoted below had been in business for a year and had a very focussed approach to using the web to generate business.

"I don't pay for advertising. I have my own website and am on at least two dozen free directories. I've worked at that. The majority of business has come through the website – say around 70% – though it can be difficult to know whether people have come to my website from the directories' web links."

The extent to which word of mouth is used does vary by group, but remains dominant across the sector. As shown in Table 14 below, the figure ranges from 51% in Textiles to 98% in Musical instruments. In general, the top three selling methods across the sector (word of mouth, advertising through a directory and online sales through the businesses' own websites) are reflected at a group level. However, there are some exceptions to this; the shaded cells in the table denote that craft retailers/shops and craft fairs are more frequently noted as routes to market in Jewellery, Toys & automata, Clay, Leather and Precious metals.

Table 14: Selling methods by group

Method of selling	Heritage Craft	Boats	Cars	Guns	Clocks & barometers	Jewellery	Musical instruments	Toys & automata	Taxidermy	Clay	Glass	Leather	Metal	Paper	Precious metals	Stone	Textiles	Wood & plant	Paint	Plaster
Word of mouth	73%	88%	79%	79%	69%	63%	98%	66%	69%	85%	65%	49%	78%	82%	88%	89%	51%	72%	77%	66%
Advertising through a directory	30%		12%	13%	71%	12%	47%	5%	16%	9%	28%	2%	36%	25%	1%	37%	24%	35%	24%	48%
Online through own website	22%	52%	32%	7%	33%	27%	41%	11%	6%	18%	44%	45%	40%	35%	17%	30%	26%	27%	5%	14%
Advertising in printed press	13%		3%	22%			4%	5%		1%	*	8%	1%		3%	5%	1%	8%	23%	35%
Commissions from businesses/institutions	10%		2%		2%	6%		11%	16%	1%	21%	6%	14%	5%	3%	8%	2%	7%	23%	
Direct to public	9%	6%	4%	26%	17%	12%	23%	7%	16%	5%	18%	18%	11%	3%	11%	20%	15%	8%		12%
Online through a third party website	6%		13%	1%		12%	5%			1%	17%	1%	23%	7%		3%	2%	4%		11%
Other	4%			13%	12%		1%	2%		1%	1%	13%	2%	1%	1%	11%	11%	1%	*	12%
Through craft retailers/shops	4%			4%		33%		71%		15%	3%	15%		*	71%	2%	7%	5%		
Leaflets and other direct marketing	2%	5%								4%		1%		1%		1%	3%	4%	2%	
Repeat business	2%			9%	12%		11%				1%	1%	9%	1%		1%	1%	5%		*
Advertising through a trade association/guild	2%	6%	4%	9%		4%	13%	5%		*	3%	3%	2%	28%		4%	2%	2%		
Through galleries or exhibitions	2%	5%	8%	1%		22%		5%		10%	6%	14%	3%	3%		1%	1%	2%		
Commissions from general public	2%		8%					5%	31%	1%	11%	2%	6%	2%	3%	*	6%	1%		
Through others in supply chain	1%	2%	1%							*	1%		1%			3%	9%	2%		
Direct to retailers who sell to the public on my behalf	1%					27%				*	2%	5%	1%	3%		1%	5%	1%		
Through craft fairs	1%					33%		71%		5%	1%	19%	1%		3%	1%	4%	1%		
Specific sales team	*			1%						*	*	1%		*		1%	1%	*	*	
Direct to businesses	*										1%		*	1%			*	1%		
Through street markets	*										1%						1%	*		
Trade fairs	*					6%						3%	*				2%			
Through an agent	*										1%	3%	*		3%		1%			

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W4/S1a) * = figure less than 0%, but not 0

NB: Totals exceed 100% as more than one method could be selected.

Table 15 considers the same list of selling methods, but shows which have been most important in each group in terms of the value of sales. Again, the shaded cells show the top three methods in each group. Whilst word of mouth remains the top method, the broader distribution of shaded cells shows that there are key differences in each group in terms of routes to market that return the most sales.

Table 15: Selling methods most valuable in terms of value of sales by group

Method most valuable in terms of sales	Heritage Craft	Boats	Cars	Guns	Clocks & barometers	Jewellery	Musical instruments	Toys & automata	Taxidermy	Clay	Glass	Leather	Metal	Paper	Precious metals	Stone	Textiles	Wood & plant	Paint	Plaster
Word of mouth	66%	87%	73%	74%	55%	30%	64%		69%	82%	64%	27%	50%	80%	80%	82%	47%	59%	77%	65%
Commissions from businesses/institutions	7%		2%		2%			5%	16%	*	2%	5%	5%	3%	3%	2%	1%	2%	21%	
Advertising in printed press	5%			9%				5%				2%	1%			1%	1%	8%	2%	23%
Advertising through a directory	4%		4%		16%		2%	5%			7%	1%	6%	1%			11%	7%		1%
Direct to public	4%			7%	3%	6%	1%			2%	3%	12%	8%		4%	5%	11%	6%		
Online through own website	4%	5%	12%	3%	12%		23%	5%		4%	9%	9%	15%	7%	4%	3%	6%	3%		
Online through a third party website	3%			1%						*	1%		6%	3%			*	2%		11%
Through craft retailers/shops	2%			1%		27%		5%		6%	1%	7%		*	5%		4%	5%		
Commissions from general public	1%								16%		10%	2%		1%			3%	*		
Leaflets and other direct marketing	1%											1%		1%			2%	4%		
Other	1%			3%			1%	2%			*		2%	1%	1%	1%	11%		*	
Repeat business	1%				12%		11%				1%	1%	5%	1%		1%	*	2%		*
Advertising through a trade association/guild	*	1%										1%				1%		1%		
Direct to businesses	*										1%		*	1%			*	*		
Direct to retailers who sell to the public on my behalf	*									*		5%	1%			1%	1%	1%		
Specific sales team	*			1%						*	*			*		1%	1%	*	*	
Through an agent	*										1%	3%	*		3%		*			
Through craft fairs	*					21%		71%		1%		11%				1%	1%	*		
Through galleries or exhibitions	*	5%	8%			10%				5%		14%					*			
Through others in supply chain	*	2%	1%								*		1%			2%		2%		
Through street markets	*																	*		
Trade fairs	*					6%							*				1%			

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W4/S1a) * = figure less than 0%, but not 0

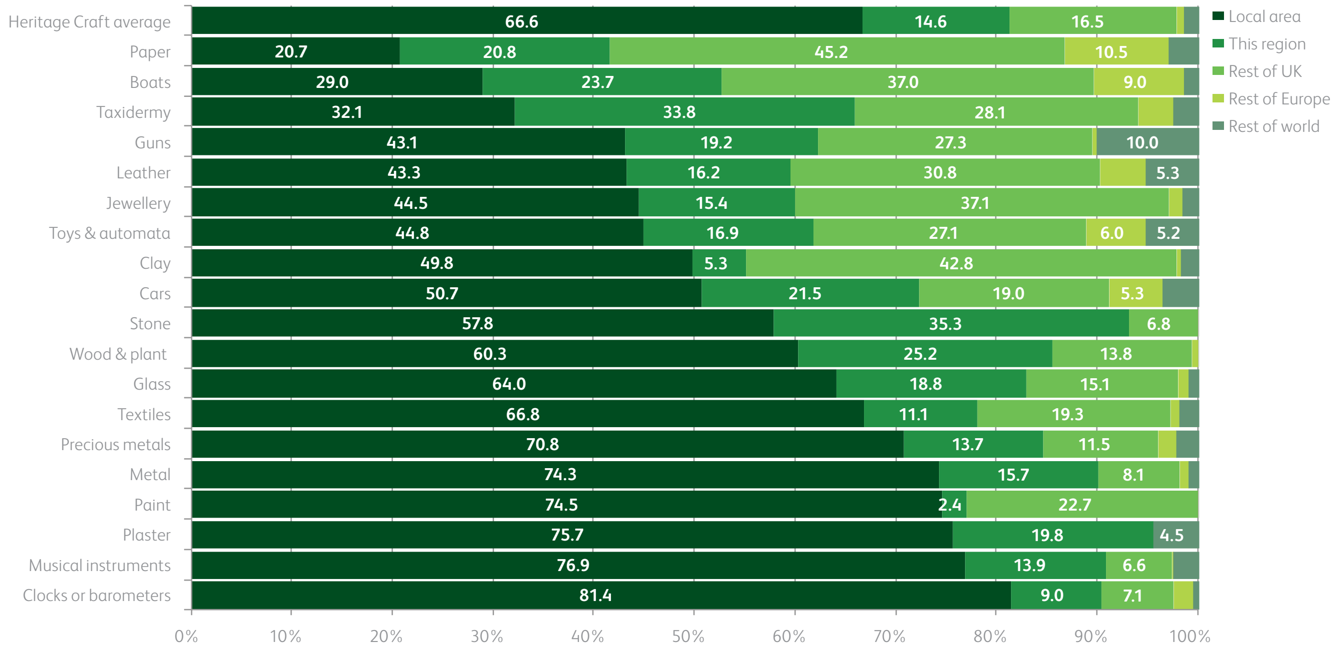
NB: Total sums to 100%, respondent required to select single most important in last year

The reliance on word of mouth as the most important method of generating income is reflected in the data on location of customers: the sector is highly dependent on locally-based customers for generating income; an average of 67% of income across the sector is generated from customers based in the local area. However, this is highly variable by group.

As shown in Figure 9 below, there is a trend for limited exporting across most groups, with a small number of exceptions. Paper and Toys & automata generate the most income from international clients, perhaps a reflection of the nature of the goods being sold and relative ease of distribution. Guns, Boats and Cars are the next most likely to export; Guns specifically are the most likely to sell outside of Europe. Given the complexities associated with the shipment of these items, one must assume that this level of income generation is driven by a niche market in the UK for these groups.

As previously noted, Guns interviewees suggested that the main market for gunmaking is in the US, that the Middle East has been buoyant, and that China and India were both good markets for European luxury items. In stark comparison, the market for repairs is UK based.

Figure 9: Proportion of income by location of customers and group



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/C3)

The variation in propensity to sell to clients based elsewhere in the UK, or even outside of the local area but within the region, is also interesting. But again, this, to some extent, reflects the nature of the activity group. Taking Instruments as an example (although these patterns are likely to be reflected across a number of groups), in chapter 4.1.1, Table 6 showed a relatively even distribution of employees in each region (with fewer in the North East). This, alongside the fact that such a large proportion of business is done within the local area and surrounding region, suggests that businesses are likely to have a base from which they operate; a workshop, perhaps, which contains all of the tools/equipment they need – and customers living in the area come to them. The even distribution of such businesses across the UK means that, generally, customers do not need to seek such an organisation outside of their home region, but on occasion do – perhaps for very specialist requirements, hence 10% of revenue from customers located elsewhere in the UK or internationally. For a Musical instrument interviewee, business from outside the area reflects a decline in the number of workshops:

"There are fewer and fewer piano shops and workshops around, and recent customers have come from Cardiff, Leamington, London, Worcester and Yorkshire. For the costs of repairing an instrument to a good standard you can now buy a reasonable piano, so people are only getting the top makes restored now – Steinway, Bechstein and Bluthner – or if it is a prized instrument. We recently restored an obscure German make that was a treasured family piano. Most of our business comes through recommendation or the internet."

For a Clocks/Antiques interviewee, the web is bringing business from beyond the local area:

"Five years ago, people used Yellow Pages. Now it is the web and I would say a third to half my business comes from the web. Clients come from all over Greater Lancashire, some from the rest of England, Scotland, America and New Zealand. The website is key, and if an item is small enough to post, people will send it."

The use of digital technology in Heritage Craft

Although it might seem a contradiction, the research investigated the role that digital technology might play in Heritage Craft – both in terms of the management of Heritage Craft businesses and in the execution of Heritage Crafts themselves. The interviewees provided evidence that a wide range of views exists as to the use and value of digital technology even in the context of skills that have been honed over a long period of time.

" I believe in technology...and while carpentry skills have been around for thousands of years and are tried and tested, it's also good to embrace the new." – Wood & plant interviewee

A number of interviewees did not use technology: they were not attracted to the idea, felt that they had neither the skills nor time to invest in it, and doubted that it would benefit the business:

"I have a computer but there's no need for it [in the business] and I have no abiding interest in using it. The paperwork's very simple. I use a duplication book for invoices. My friends have found using a computer less than reliable." – Guns interviewee

Predictably, business administration is a common use of the technology. Interviewees reported using computers for organising their finances, ordering materials, and for correspondence, in particular – sending photographs of work, showing progress on restoration to clients – as well as undertaking research.

"Digital photography has made work easier and quicker. You can show work in progress… and can go out [to a prospective client] and send back an image to the workshop for comment." – Musical instrument interviewee

Marketing and selling is the most common use of technology. The survey for this research identified that 22% businesses sell online through their own website and that 6% sell through a third-party website. For all Heritage Crafts, apart from Guns, selling online is one of the top three retail methods. However, online sales are only rated as producing 7% of sales values (4% own website, 3% third party).

"I recently re-did my website and have got it working more efficiently [using search engine optimisation]. This has brought in work about every two months. I suspect the cost of setting it up isn't justified by the return. But, the new website [gives me] a higher profile and I've learnt a lot from the new people who are hosting it." – Wood & plant interviewee

A few interviewees described using digital technology for production, where this saved time, money and, in one instance, for the refurbishment of a musical instrument:

"The production of these guns hasn't changed in 100 years – that's part of the attraction. But [digital technology] is something that we use on an outsourcing basis, when parts are machined. CNC [computer numerical control] machining takes the hard graft out of what would take hours to do by hand." – Guns interviewee

"Digital sound – [if] you can have an attractive old piano case with a mechanism that either can't be restored or isn't economic to restore, we can convert it into a digital piano. I'm thinking about having one of the technicians doing more on digital electronics." – Musical instrument interviewee

Interviewees' future plans for using digital technology tended to be conservative. Most people were satisfied with their current uses of it. However, a few envisaged developing their websites and their use of social media.

"I know people who've developed sites and can use them for current projects and highlighting work in real time." – Wood & plant interviewee

With a few exceptions, most interviewees had no plans to develop their digital skills, and felt that they had the basics for their business administration and website needs.

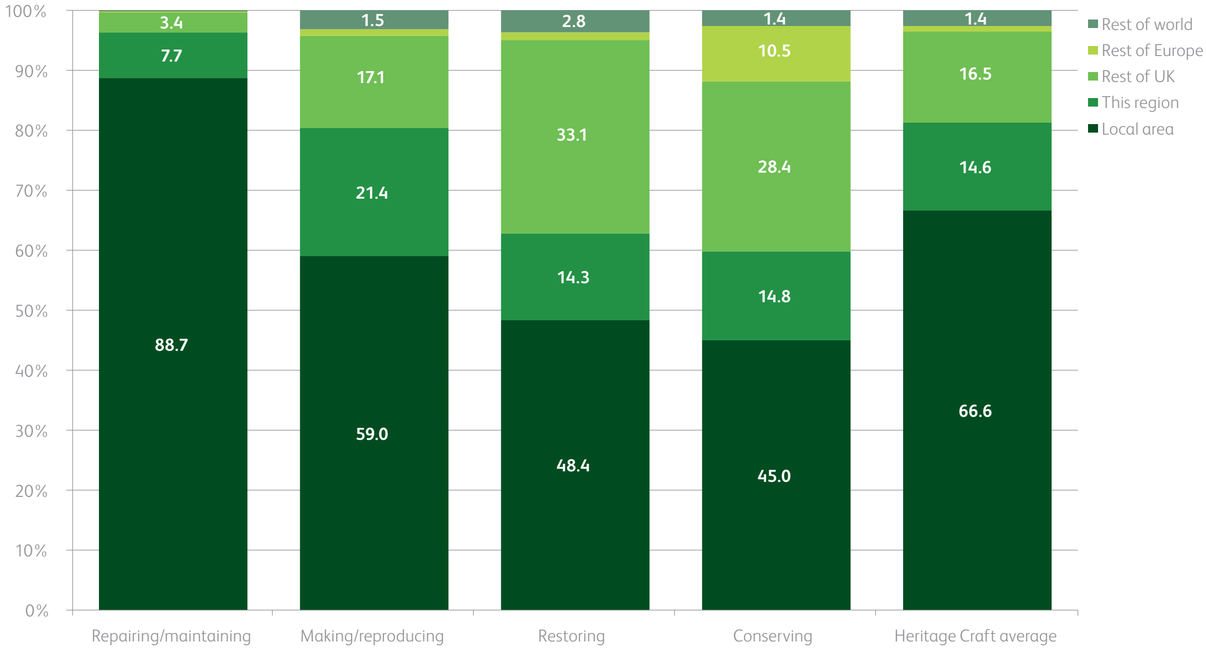
"I've been looking at my training needs and have looked at a six-week business development course... The modules include IT… It's not so much about a return on the money, but being able to do something better. Instead of spending three hours on the computer, I could spend one hour and have more leisure time." – Wood & plant interviewee

As one can see from the above examples, while it is possible that the limited use of digital technology and limited ambition to develop its use may reflect the predominantly older profile of the workforce and the importance of word-of-mouth selling, there is scope for more businesses to effectively use digital technology.

Bartholomew Harris, Carpenter
Photography by Briony Campbell

Figure 10 below considers the location of customers according to the main activity of the business. Those who are conserving or restoring things as a main activity are far more likely to generate revenue from customers based outside of the local area than those who are repairing/maintaining things. This may reflect an implicit difference in the nature of the activity and the availability of the different skills required for repair and maintenance versus restoration and/or conservation. The fact that almost 90% of revenue comes from local customers in the repairing group suggests that customers do not need to look much further than the immediate local area to find someone able to repair their item/building/structure. However, the fact that restoration and conservation businesses generate just over half of their income from customers based outside the local area suggests that people must look further afield for specialist skills. This is reflected in the fact that so few organisations specialise in conservation, and relatively few in restoration (see Table 12, page 56).

Figure 10: Proportion of income by location of customers and main activity



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/C1)

4.3.3 Driving economic performance

One of the aims of the in-depth interviews was to gain insight from businesses on the approach to driving the performance of the business through planning and setting financial targets and defining measures of success and quality.

In the main, interviewees' approach to business planning was non-existent or variable. However, it is noticeable that where businesses have, or have had, employees, the approach is more systematic.

Most businesses do not have financial targets, but are conscious of cash flow. This partly reflects the fact that the majority of interviewees were self-employed and wanted to remain in business but had no desire to expand the business. Consequently, their approaches to planning tended to be linked to the size and scale of what was feasible within those constraints:

"I do cash forecasting. As a small business, this can be in my head. You do need to keep an eye on things. For example, if I have a big job coming up that needs 30 metres of fabric, have I got enough cash to pay for it?" – Wood & plant interviewee

However, the current financial climate is making planning more difficult. Interviewees across the board implied that neither current estimates nor the use of previous financial performance information were necessarily helpful:

"I keep quarterly retail figures and have three years' worth as an indication of what is happening. Going forward, I have no idea as previous patterns have changed. Friday and Saturday used to be busy, but no longer. It's impossible to say how things will pan out at the moment and so planning is more difficult because of these variations. The quarterly pattern has changed altogether." – Clocks/antiques interviewee

In terms of measuring business success, interviewees noted three particular factors which they identified with success:

1. Pride and self-respect in your work: “I get a great deal of satisfaction out of doing it and knowing that I can provide people with what they want. [I also get satisfaction from:] [knowing] when there’s enough work for the next year; having good publicity; and just being there – being able to do what I do to earn a living.” – Guns interviewee
2. Making money to run the business, live comfortably and stay out of debt. Success is: “…Getting paid (truly, it’s difficult when builders rip you off), being associated with quality, not having an overdraft, knowing that you’ve done a good job and that your repair is going to last at least 100 years, receiving awards and having a good share of the market.” – Stone interviewee
3. Customer and client satisfaction: “[Success is having a] good reputation. People have something that’ll last a long time. We also have a very important role/responsibility if someone’s learning to play. If the instrument’s not good quality, this affects their progress and perception of how they are doing.” – Musical instrument interviewee

Without exception, quality was seen as an essential measure of success; crucial for both customer satisfaction and repeat business.

“We depend on quality – work comes in by word of mouth and repeat business.” – Stone interviewee

As one can see from the above examples, while it is possible that the limited use of digital technology and limited ambition to develop its use may reflect the predominantly older profile of the workforce and the importance of word-of-mouth selling, there is scope for more businesses to effectively use digital technology.

Quality is monitored and managed in various ways. Several interviewees spoke of the importance of being aware of other practitioners’ work as a way of maintaining standards. Others, but notably not all, had industry standards to which to refer. For example, the British Horological Institute’s Code of Practice[26] was noted. The gun trade is particularly sensitive to standards:

“Our rule is that a job has to be right or it has to be done again until it is right. It’s crucial for shotguns; if they go off, you’re going to be holding them in your hands, very near to your face. They have to be sent to the proof house for testing.”[27] – Guns interviewee

“We know the standards we need to work to and we do so. [Our] staff are trained and we mix with other restoration businesses and meet people and talk. If a business is isolated, standards can drop.” – Musical instrument interviewee

In general, businesses have a self-set, in-house standard against which they monitor the quality of work. This is often linked to considerations such as affordability, customer service and the needs of the customer.

“We have our own in-house standards. This is most important and we try to maintain those standards. As a small family business, once you lose your reputation, it is very difficult to get it back.” – Wood & plant interviewee

Interestingly, clients’ awareness of quality or lack of awareness was also raised by a few interviewees. For example:

“I often have to lead and show the architect, interior designer [and] client what this [quality] means. I show them very high-quality work and then match their criteria and the budget. Sometimes there is not enough budget for the amount of carving, and I prefer to do less carving and maintain a very high quality. It is very important for the reputation of the business.” – Wood & plant interviewee

26 http://www.bhi.co.uk/Documents/Code.pdf
27 http://www.gunmakers.org.uk/proofhouse.html

Blacksmith
Photography by Paul Felix

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5 Supply of Heritage Craft Skills and Knowledge

5.1 The sector's training requirements and habits

"My son is taking over and he has to learn everything from me – skills I've acquired over 50 years. At school, he didn't do anything practical. They designed things, but weren't allowed to use the lathe in the workshop. The technician had to do all the work on that. But we're not all going to be designers…" – Guns interviewee

The most popular forms of training and education undertaken to develop Heritage Craft skills and knowledge are experience through working/learning by doing (43%), formal apprenticeships (30%), and mentoring from an experienced craftsperson (21%). These figures reinforce evidence from the in-depth interviews that learning in the sector is mainly a process achieved from doing – direct interaction and experience – rather than institution-based learning (e.g. degree course at a college/university).

"If I was bit younger, I might have gone off and studied horology at West Dean or done a week-long course at the Horology Institute at Newark. No doubt this would have improved my skills. Also I could have had a fully equipped workshop with lathe, etc. – all this would cost about £30k. I know someone who did this and it bankrupted them. My cabinetmaker went to West Dean, in contrast to a local woodworker who makes kitchens and does much cruder work but makes 10 times more than him."
– Clocks interviewee

Table 16: Education/training used and contribution made to current skills

Education/Training	% stating method used	% stating method contributes most to current level of skill
Experience through working/learning by doing	43%	27%
Formal apprenticeships with a qualification attached	30%	20%
Mentoring from an experienced crafts person	21%	16%
Other vocational qualification	16%	10%
NVQ	15%	11%
Informal apprenticeships (e.g. a set period of time working with experienced crafts people)	14%	9%
Experimentation, deliberately trying new things to push the boundaries of skills and knowledge	5%	1%
Degree course at a college/university (BA, BSc)	4%	3%
Part-time or short course without a qualification	3%	2%
A-Level/O-Level/GCSE in a related subject	2%	0.3%
HNC/HND	2%	0.4%
Postgraduate degree at a college/university (MA, MSc, PhD)	1%	0.4%
Part-time or short course with a qualification	1%	0.1%
Adult education classes	1%	0.2%
Foundation degree course	0.3%	0.04%
Free online tutorials	0.2%	0.1%
Other[28]	7%	13%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4)

28 City & Guilds was noted frequently as falling under specific "other" type of training used and valued by employers. A smaller number also noted professional memberships as being useful, as well as opportunities to study abroad.

It is important to note that these forms of education and training reflect the range of activities all employees have undertaken, not just new starters. For example, if someone aged 50 undertook an apprenticeship when they were a teenager and believed that this made a contribution to their current level of skill and knowledge, this would be recorded here.

The forms of training also reflect the data presented earlier in the report in the skills profile of the workforce (Figure 6, page 47), particularly the tendency towards either non-qualification based training/learning or vocational qualifications.

"People from colleges may have certificates, but they don't have the experience." – Stone interviewee

A number of businesses talked about the decline of apprenticeships in relation to young people's attitudes and the education system:

"Restoration is a core part of the business. It used to be larger and we had apprentices, but over the years this became less popular and young people didn't want to learn the skills. They were more interested in IT and earning more money, so it's declined. We started in 1986 and it is about 18 years since we had an apprentice. The trainees used to do an apprenticeship in antique restoration and we sent them to college as backup. But the courses changed – going into plastics and areas not relevant to our business."

"I think my skills are becoming scarcer and nothing ever seems to happen to rectify that. It almost seems that people are discouraged at school. It's better to be a computer whizz or be in finance, and there's a negative attitude to people who want to work with their hands. I have friends in Germany, where joiners and plumbers are revered people." – Wood & plant interviewees

Table 17 (next page) presents the most common types of training undertaken across the sector and the extent to which employers consider these types of training to have contributed to the current level of Heritage Craft skill and knowledge in the business.

The colour coding on the table helps to identify groups where there are issues in the balance between the types of training employers feel is relevant and that which workers have undertaken. Groups where all of the highlighted cells are pale green are balanced: employers use these types of training regularly and note them as being one of the top three in terms of developing current levels of Heritage Craft skill and knowledge. Groups that have multi-coloured cells are imbalanced: employees have undertaken training, but employers do not consider that type of training to contribute significantly to Heritage Craft skills and knowledge. The dark green cell denotes one of the three types of training commonly undertaken; the light green cell denotes the type that employers feel is more valuable (than the dark green cell).

Table 17: Education and training undertaken and contribution to current level of skill by group

Group	Type of training	Average	Boats	Cars	Guns	Clocks and barometers	Jewellery	Musical instruments	Toys & automata	Taxidermy	Clay	Glass	Leather	Metal	Paper	Precious Metals	Stone	Textiles	Wood & plant	Paint	Plaster
Secondary education	A-Level/O-Level/ GCSE in a related subject	2%	5%		9%		6%					1%	3%	4%			*	13%	1%	2%	
Higher education	Degree course at a college/university (BA, BSc)	4%	1%			12%	6%	5%	73%		4%	13%	4%	3%	5%	1%		14%	6%	2%	
	Foundation degree course	*		8%			6%				1%		1%		1%	1%	1%		1%		
	Postgraduate degree (MA, MSc, PhD)	1%			9%				60%			7%	1%	1%				4%	*		
Vocational qualifications	Formal apprenticeships with a qualification attached	30%		25%	4%	52%		2%	2%		33%	29%	15%	31%	26%	13%	56%	5%	32%	28%	51%
	HNC/HND	2%		13%	3%			11%		16%	1%	2%		1%	1%	3%		3%	1%	2%	
	NVQ	15%		8%			12%				7%	1%	5%	2%	17%		14%	1%	28%	24%	14%
	Other vocational qualification	16%	6%	13%	9%	2%	6%	23%			6%	2%	18%	14%	24%	1%	8%	15%	15%	24%	12%
	Part-time or short course with a qualification	1%	2%									1%	2%	1%		3%	1%	1%	4%		
Unaccredited training	Adult education classes	1%		1%			21%	11%				2%	3%	3%				1%	1%		
	Informal apprenticeships	14%	10%	9%	26%	3%	6%	25%		16%	5%	16%	5%	17%	1%	69%	12%	15%	27%	2%	12%
	Part-time or short course without a qualification	3%					27%	11%			33%	3%	2%	5%		3%	*	*	1%		
Mentoring	Mentoring from an experienced crafts person	21%	55%	16%	29%	19%	34%	27%	5%		5%	38%	15%	19%	15%	15%	14%	14%	7%	26%	35%
Independent experiential learning	Experience through working, learning by doing	43%	70%	56%	60%	52%	39%	41%	27%	69%	48%	51%	64%	52%	23%	18%	34%	62%	46%	33%	39%
	Experimentation	5%	10%	19%	9%		6%				3%	8%	6%	9%	2%		3%	13%	8%	2%	
	Free online tutorials	*						2%										8%	1%		
	Other	7%	12%		24%	24%	6%	13%	5%	47%		3%	5%	17%	10%	6%	12%	19%	12%		1%
	Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Key:

- Method of training in the top three most commonly undertaken and is considered to have contributed significantly to current level of skill and knowledge
- Method of training in the top three most commonly undertaken but is not considered to have contributed significantly to current level of skill and knowledge
- Method of training not in the top three most commonly undertaken but is considered to make significant contribution to current level of skill and knowledge

Across the board, experience through work is used and also valued by employers as making a positive contribution to current level of skill. Two slight variations in this can be seen in Precious Metals and Paint, where employers note that either formal apprenticeships (Metal) or NVQs (Paint) have made a stronger contribution to skills than experience through working.

There is an interesting cluster of green cells toward the top right of the table. Generally, these cells highlight instances where employers state that their employees have undertaken some form of experiential learning, but they feel that the qualification-based training would be more effective in developing skills.

Attitudes towards apprenticeships

Heritage Craft businesses have an emphasis on learning by doing, including apprenticeships, but attitudes amongst those businesses interviewed show an ambivalence. Many of the concerns are shared across small businesses, as seen in the recent Holt review[29]. For example, concerns about training the competition is noted in this research and in the Holt review introduction. Any development in the provision of apprenticeships needs to address these industry concerns.

Regulation and bureaucracy are seen as challenges:

"The last government contrived to make it very hard for small businesses to take on apprentices for financial and other reasons. We previously had lads on work experience, but all the paperwork and expensive insurance was a real burden." – Guns interviewee

"I wouldn't want to take anyone on… It's very hard to do all the paperwork and sort it out for someone else. In the long term, I guess the sector will just go. Sad to say, there won't be the people to teach it." – Stone interviewee

Costs and having sufficient business to generate work for an apprentice were concerns voiced by self-employed business owners:

"I'd have liked to train someone, but would've struggled to give them enough work to fully occupy them." – Clocks interviewee

Negative attitudes towards young people are an issue, even if these are likely to reflect wider generational attitudes towards young people amongst a predominantly older workforce:

"I don't take on young people. 18-year-olds are not what they used to be! It's not the same as when I was young, when you expected to work and money was what it was. Now the issue is commitment. You can invest time in someone who, a year in, may decide it is not for them. You need three to four years to learn the trade." – Wood & plant interviewee

Attitudes were more positive amongst businesses that currently or previously had young people in their workforce.

"We have one or two work experience placements a year… Students usually come for a week and this year the girl asked to come back in the summer… I'd consider taking on an apprentice." – Musical instrument interviewee

29 Department for Business Innovation and Skills 2012 Making Apprenticeships more accessible to small and medium-sized businesses BIS p4

Similar patterns occur when it comes to employers maintaining and improving the Heritage Craft skills and knowledge used in the business. The method most commonly used was experience through working/learning by doing (55%). Furthermore, very few pursued short courses, adult education classes, mentoring, or free online tutorials. Of concern is that a fifth of businesses actually do nothing to maintain and improve their Heritage Craft skills and knowledge. Some of the veteran craftsmen interviewed, who had racked up decades of experience, doubted that anyone could "provide the next-step training" for them:

"Not planning to develop skills further – have a lifetime of experience." – Clocks/Antiques interviewee

Several had weighed up the cost benefit of acquiring new skills:

"One day I would like to learn about a style of rush seating that includes straw and gives a golden colour, but it wouldn't be economical to do as it would cost the customer more and they wouldn't pay the price." – Wood & plant interviewee

Table 18: Maintaining and improving Heritage Craft skills and knowledge

Method	% response
Experience through working/learning by doing	55%
Continuing work/commissions	14%
Experimentation, deliberately trying new things to push the boundaries of skills and knowledge	8%
Networking with other craft practitioners	5%
Adult education classes	2%
Mentoring from an experienced craftsperson	2%
Free online tutorials	2%
Part-time or short courses without a qualification	1%
Manufacturer/supplier training	1%
Part-time or short courses with a qualification	0%
Nothing	21%
Other[30]	22%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4)

There are few variations in the pattern by group, with the top four above being used by most businesses. As shown in Table 19 below, the only exceptions to this are in Jewellery, Musical instruments and Leather where part-time/short courses without a qualification are more commonly used, and Stone, where employers note adult education classes.

30 The most common other activities were to read literature in various formats (books, magazines, newsletters) and to undertake research (often on the internet) to keep up to date, undertaking specific training in-house or through information/activities from a professional body/guild.

Table 19: Methods of maintaining and improving skills and knowledge by group

Group	Experience through working	Continuing work/ commissions	Experi-mentation	Networking with other craft practitioners	Free online tutorials	Mentoring	Adult education classes	Manufacturer/ supplier training	Part-time/short courses w/o a qualification	Part-time/short courses with qualification	Nothing	Other
Boats	48%	12%	23%			5%			5%	2%	37%	10%
Cars	49%	3%	8%	8%	4%	8%		8%	2%		12%	17%
Guns	88%	11%	13%	3%	9%	1%					3%	8%
Clocks and barometers	59%	28%	24%	12%		12%	12%		3%	3%	16%	2%
Jewellery	28%		6%	18%			21%		43%		12%	33%
Musical instruments	40%	2%		11%		11%	11%	11%	12%			60%
Toys & automata	23%	13%		5%			2%				5%	71%
Taxidermy	47%	16%		37%							16%	16%
Clay	50%	41%	4%	3%	*		4%	1%	1%	0%	4%	15%
Glass	64%	3%	6%	10%	*	8%	7%	*	3%	3%	28%	4%
Leather	48%	11%	6%	2%		10%			14%	4%	25%	9%
Metal	52%	27%	12%	7%	1%	2%	2%	1%	*	1%	19%	14%
Paper	56%	7%		37%		6%					9%	8%
Precious Metals	17%	10%	7%	1%		1%	1%	3%			2%	73%
Stone	41%	11%	10%	1%	9%	1%	17%	1%	2%	2%	27%	5%
Textiles	53%	15%	8%	4%	13%	1%		1%	1%	*	8%	26%
Wood & plant	67%	19%	24%	8%	1%	0%	*	1%	0%	*	7%	27%
Paint	48%	7%		2%	2%	1%	*				44%	27%
Plaster	60%	11%									15%	14%
Average	55%	14%	8%	5%	2%	2%	2%	1%	1%	0%	21%	22%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4) = figure less than 0%, but not 0

A number of interviewees spoke of the value of fellow craft practitioners and trade associations in supporting learning:

"If I have a difficult problem or issue, I can pick up the phone and speak to colleagues." – Wood & plant interviewee

Interviewees referred to various associations, including the Pianoforte Tuners' Association, the Federation of Small Businesses, the Music Industries Association and the British Violin Making Association. However, other interviewees were not so positive about the value of trade associations (see page 104, Networks and Business Support).

When considering the maintenance and improvement of skill by business activity, there is very little variation from the sector average for businesses for which the main activity is making/reproducing things, or repairing/maintaining things. However, businesses which mainly restore things are significantly more likely to do nothing to maintain and improve skills (46% compared to an average of 21%), and businesses who mainly conserve things are significantly less likely to do nothing (4% compared to 21%). Restoration-focussed businesses are also more likely to use mentoring (28%) and seek specific learning opportunities from their continuing work/commissions (41%) to maintain/improve skills.

A potential explanation for this lack of engagement with specific types of training mechanisms versus a high degree of experiential learning is that only one-third (33%) of businesses overall felt that there were currently Heritage Craft skills and/or knowledge that they themselves or their team would like to develop. This demand for new skills and knowledge varies across Heritage Craft groups. Approximately half of businesses in Jewellery, Clocks and barometers, Textiles and Paint identified development needs, compared to 15% or less in Stone, Plaster, Guns and Precious Metals.

Table 20: Presence of training needs by group

Group	Yes	No
Jewellery	54%	46%
Clocks and barometers	52%	48%
Textiles	46%	54%
Paint	44%	56%
Boats	40%	60%
Leather	38%	62%
Metal	38%	62%
Wood & plant	37%	63%
Musical instruments	36%	64%
Heritage Craft average	**33%**	**67%**
Taxidermy	31%	69%
Cars	29%	71%
Paper	26%	74%
Toys & automata	18%	82%
Clay	18%	82%
Glass	17%	83%
Stone	15%	85%
Plaster	15%	85%
Guns	14%	86%
Precious Metals	5%	95%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4)

This pattern is replicated across the different activity types, with 37% of businesses making/reproducing things, 28% repairing/maintaining, or 35% restoring things, noting that they had a current need for new skills and knowledge development. This is in contrast to businesses which are conserving things, where only 10% identified any current development needs.

Where businesses did note the requirement for further skills and knowledge development, this most commonly related to additional skills working with a specific material related to their craft, or formalising their skills through further study and/or qualifications.

Table 21: Type of skills, knowledge or training required

Skills, knowledge or training	% response
Skills working with a specific material	21%
Undertaking formal study and/or qualifications related to personal/company skills	17%
Skills related to creating a specialist product	10%
Business skills	6%
Digital skills to support the process of designing and/or making products	4%
Skills related to using specific craft tools/equipment	3%
Collaboration work to learn from other craft designers/workers	1%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4)

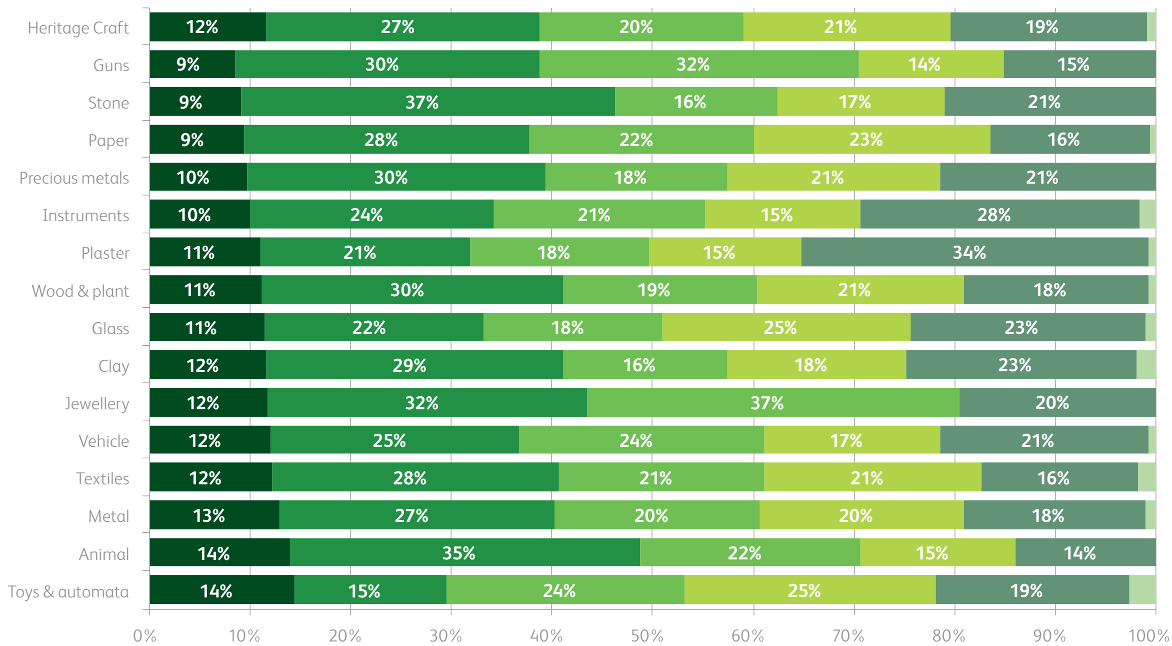
5.2 New entrants to the sector

In order to understand the profile of new entrants to the sector, Figure 11 below considers the length of time people working in the sector have been in their current role. New entrants are considered to be those who have been in their current position for less than one year.

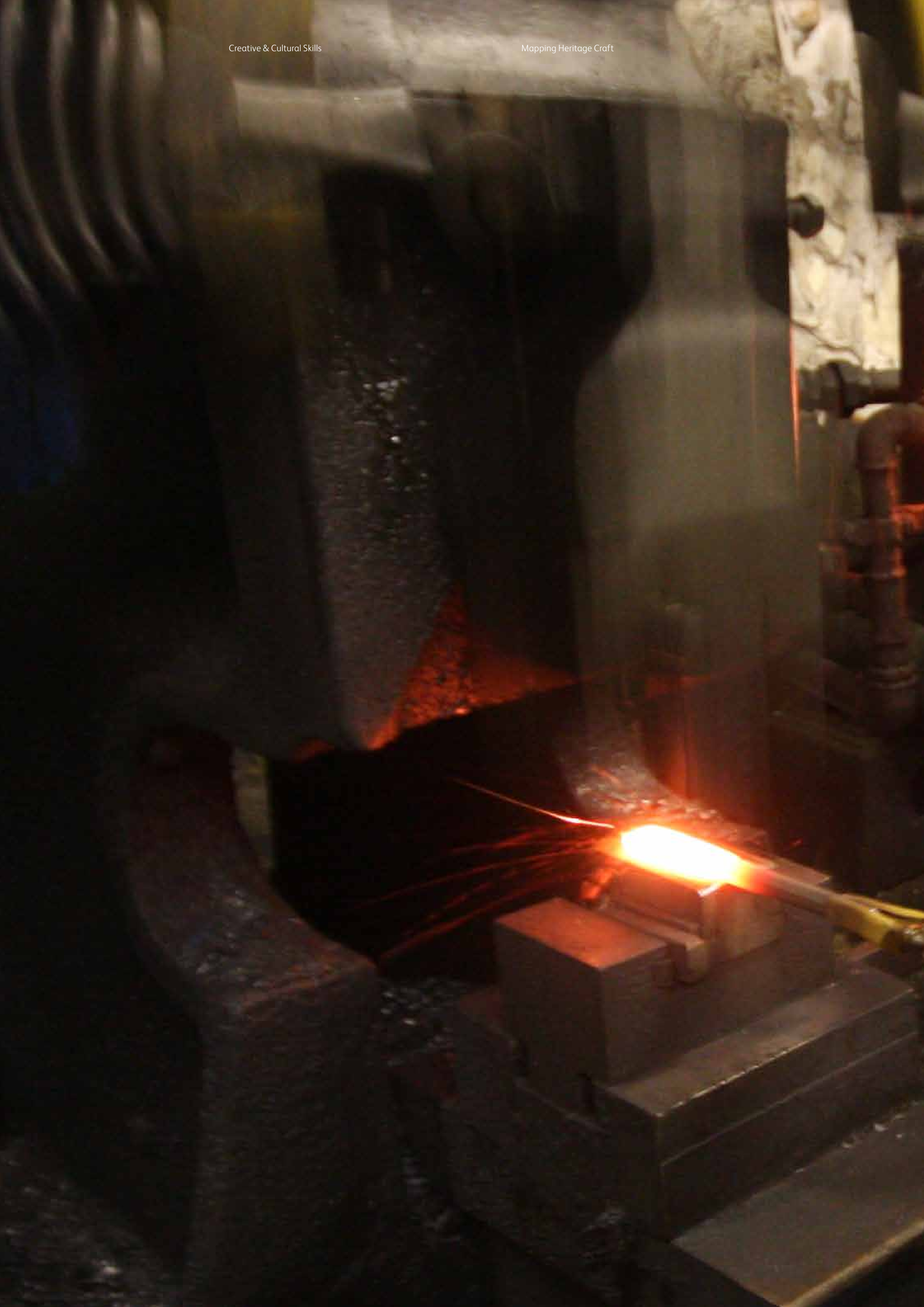
Across the sector, an average of 12% of the workforce are new entrants. However, it is interesting to note that the largest group is those who have been in their current role for 1-5 years; just over a quarter of the workforce (27%) falls into this category.

The length of apprenticeship programmes and opinion as to the length of time required to establish skills and knowledge in Heritage Crafts differ. However, taking into account a varying learning period depending on the educational route chosen (perhaps anything from 1-6 or 7 years), it would be fair to describe these two groups combined as “apprentice” workers. In which case, just under 40% of the workforce is in the apprenticeship phase of developing their skills and 60% are established craft workers.

Figure 11: Length of time working in the sector



Source: Annual Population Survey 2011 (TBR Ref: W09/C1)



Photography by Robin Wood/Heritage Crafts Association

As might be expected, the pattern varies across groups:

- Employees in the Animal group tend to have been in their current role for a shorter period of time than average, with 71% of employees having been in their current role for 10 years or less.
- Those employed in the Glass group tend to have been employed in their current role for a longer period, with 48% of employees having been in their current role for 10 years or more.
- Employees in the Guns group are much more likely than average to have been in their role for between 5-10 years (32%). They are also less likely to have been in their role for less than a year (9%) or 10-20 years (14%).
- Those employed in the Instruments group are much more likely than average to have been in their role for 20 years or more but much less likely than average to have been in their current role for 10-20 years.
- Jewellery group employees are much more likely than average to have been in their current role for 5-10 years, whilst none have been employed in their current role for 10-20 years.
- The Plaster group has the highest proportion of employees that have been in their current role for more than 20 years (34%). However, the proportion that have been in their current role for between 10-20 years is lower than average (15%).
- Employees in the Stone group are considerably more likely than average to have been in their current role for 5-10 years (37%).
- The Toys & automata group has a lower proportion of employees that have been in their current role for 1-5 years (15%). However, employees in this group are more likely to have been in their current role for less than a year (14%).

New entrants to the sector – those in the apprenticeship phase of development in their current role – are most likely to be aged between 20 and 34. However, approximately a third are also likely to be aged between 35 and 49. This reinforces anecdotal evidence that, for many, the move into Heritage Craft is a career change later in life, rather than a first career.

Table 22: Age of new entrants

Age group	Time in current role Less than 1 year	1-5 years
16 to 19	13%	4%
20 to 34	43%	47%
35 to 49	30%	33%
50 to 59	12%	12%
60+	3%	4%

Source: Annual Population Survey 2011 (TBR Ref: W09/S5a)

With the exception of the Vehicles group and Precious metals, the groups most likely to be employing young people from school leaving age (16-19) tend to be those with a strong link to construction (Wood & plant, Clay, Metal, Plaster).

Table 23: Age of new entrants by group

Row Labels	16 to 19	20 to 34	Less than 1 year & 1-5 years 35 to 49	50 to 59	60 +
Wood & plant	10%	49%	25%	13%	3%
Precious metals	8%	49%	22%	15%	6%
Vehicles	8%	39%	30%	17%	6%
Clay	7%	48%	36%	7%	2%
Metal	7%	46%	33%	12%	3%
Plaster	6%	53%	35%	1%	4%
Textiles	6%	41%	33%	16%	4%
Guns	5%	35%	40%	4%	15%
Animal	4%	42%	44%	5%	6%
Toys & automata	4%	44%	13%	19%	20%
Glass	3%	44%	35%	14%	4%
Instruments	3%	40%	35%	15%	7%
Paper	3%	43%	36%	14%	4%
Stone	3%	37%	26%	17%	17%
Jewellery	0%	32%	68%	0%	0%
Total	**7%**	**45%**	**32%**	**12%**	**4%**

Source: Annual Population Survey 2011 (TBR Ref: W09/S5a)

Again, the trend for people to move into the sector later in (or towards the end of) their career is evident, particularly so in Toys & automata, Stone and Guns, where between 15% and 20% of new entrants are aged 60+.

For those in-depth interviewees who came into the sector at a young age, the routes were generally informal and often based on decisions made when young:

"The business just happened. My husband left school, where he had been encouraged to be a stonemason. He's done it all his life." – Stone interviewee

"I started in 1977. I was ignorant of the trade then – ignorant of most things, actually. I was looking for a job... Someone mentioned a job in the Gun Quarter. I got the job and I've been there ever since." – Guns interviewee

5.3 The training available to the sector

As detailed in Chapter 5.1, the most popular forms of training and education undertaken to develop Heritage Craft skills and knowledge are experience through working/learning by doing (43%), formal apprenticeships (30%) and mentoring from an experienced craftsperson (21%). With this in mind, the focus of this element of the research was to gather information on the range of training opportunities available to support these types of learning.

An obvious challenge is that much experiential learning is self-directed and mentoring relationships are often informally arranged. As such, it was necessary to establish a more specific information requirement related to experiential learning opportunities. The in-depth information provided by interviewees fed back a number of positive comments about access to learning opportunities provided by trade associations and guilds, and the value of interaction with peers in terms of skill development, either through informal networks or, again, through an association/guild. With this in mind, the decision was taken to undertake a review of the learning opportunities provided across Heritage Craft guilds and associations to understand the "offer" to the workforce.

5.3.1 Supply of training from guilds

The following chapter provides an overview of the types of training available across the sector from the guilds reviewed. More detailed information by each Craft group is available in the appendix in Chapter 8.3. Further detail on the approach taken is provided in Chapter 8.1.7.

Overall, the main type of training provided by the guilds is entry level. This training is largely designed for members of the public to learn the basic skills and knowledge of a particular craft, which helps to develop skills as an amateur. On the whole, the courses are short-term (i.e. less than a week) and are provided by experienced and skilled members of the guilds. They take the form of classes or workshops, with a demonstration from the expert and practical experience for those participating. The vast majority of these courses do not result in the participant obtaining a qualification.

Following on from this, the "next step" of training provided by the guilds is a range of courses to support Continuing Professional Development (CPD) for professionals already operating in the sector. This type of training is aimed at individuals who have already attained a specific level of skill in the craft and who wish to specialise in a certain area. Again, the courses largely take the form of an expert or specialist from the guild running a short-term class or workshop, with a demonstration from the expert and the opportunity for practical engagement from the participants. CPD courses are less extensively offered across guilds and associations than entry-level courses, but are a significant element of the training offer for the development of skills at a professional level.

In order to encourage progression, some of the guilds provide taster courses, then signpost to other organisations/institutions that offer more practical qualification-based training such as NVQs or apprenticeships, or where speciality skills can be learned at higher education level or through CPD.

A key element of the offer from guilds is their engagement with and support of apprenticeships in the sector. The level of engagement in the provision of apprenticeships appears to function at two levels:

1. The guilds act as a mediator for connecting businesses (usually members of the guild) that have apprenticeship vacancies with persons seeking an apprenticeship in that craft. For example, the guilds will provide a list of members with apprenticeship vacancies and those interested in obtaining an apprenticeship can contact them (either directly or through the guild).
2. Some guilds have a deeper level of engagement with the supply of apprenticeships in the sector. This involves the design of the apprenticeships and acting as a governing body. As a governing body, the guild sets out the learning objectives and standards required for a successful candidate to complete the apprenticeship.

As might be anticipated, given the limited use of higher education (HE) and the preference for vocational qualifications, very few of the guilds had formal relationships with universities. Rather, they tend to have links to further education (FE) institutions offering courses that are relevant to their craft. In some cases, the guilds offer bursaries and grants for members that enrol in certain courses at FE institutions. At this level, the most the guilds do is potentially offer financial incentives for members of their guilds to enrol in these courses. There does not appear to be the same pattern for engagement in FE curriculum as there is in apprenticeship design.

In addition to bursaries for study, some guilds also offer support to help craftspeople develop their skills in other ways – for example, work-shadowing or studying abroad.

Informal learning and development opportunities – such as exhibitions and lectures, which do not have specific learning objectives but provide the opportunity to keep up to date and network with peers – are a common feature of the landscape. These experiences can be more intangible in terms of measuring their contribution to skills and knowledge. However, as seen in the in-depth information provided by interviewees, this access to the peer network is extremely valuable.

On the whole, access (in terms of geographical location) is dependent on the type/level of training. The supply of entry-level training is dispersed broadly throughout England, meaning that people aiming to learn basic skills should be able to find a short-term course relatively close by. The CPD courses provided by the guilds are more geographically sparse and largely dependent on where the skilled craftsperson with the specialist skill either lives or does business.

Owen Wall, Ceramicist
Photography by Briony Campbell

There appear to be very few opportunities to access learning related to the more practical aspects of running a Heritage Craft business through guilds. Some are proactive in this respect, offering courses on business skills to aspiring craftspeople, advising on how to establish a company and earn a living from the craft. Such courses include, for example, improving sales techniques, creating a customer database and developing a business plan.

5.3.2 Supply of apprenticeships

Mapping the availability of apprenticeships is not a straightforward task. Apprenticeships are offered under a variety of frameworks according to the sector in which they are delivered, and data is usually reported at the framework level. Only limited data is available to describe the nature of the apprenticeship and therefore it is not possible to determine the extent of relevant Heritage Craft activity. The occupation of the individual undertaking the apprenticeship is also not available, as this level of data is suppressed in accordance with the Skills Funding Agency's data protection arrangements.

Given these restraints, it is very difficult to articulate a detailed view on the current supply of apprenticeships. However, information is available to describe:

- Vacant apprenticeships currently advertised on the National Apprenticeship Service website.
- The number of apprenticeships started and achieved in allied frameworks up to April 2012.

This provides a useful indication of the apprenticeship opportunities available to the sector.

5.3.2.1 Vacancies with the National Apprenticeship Service

Table 24 presents data drawn from the National Apprenticeship Service vacancy search facility using keywords associated with each group to identify relevant opportunities. Immediately apparent is the paucity of formal opportunities. However, it should be noted that it is possible to undertake apprenticeships in some of these groups (e.g. Jewellery), but at present there are no advertised vacancies.

Table 24: Regional distribution of apprenticeships

Group	East Mids	East of England	London	North East	North West	South East	South West	West Mids	Yorks & Humber	England
Wood & plant	5	4	1	9	27	21	28	4	13	112
Paint	3	2	2	6	13	7	8		4	45
Generic		3	2	2	4	4	2	4	2	23
Clay	1			7		3	1	3		15
Plaster		2	1		4	1	4			12
Metal					3	2	1	1	1	8
Glass			1		2					3
Textiles									1	1
Animal								1		1
Stone							1			1
Vehicles										
Guns										
Jewellery										
Toys & automata										
Precious metals										
Instruments										
Paper										
Grand Total	9	11	7	24	53	38	45	13	21	221
% Distribution	**4%**	**5%**	**3%**	**11%**	**24%**	**17%**	**20%**	**6%**	**10%**	**100%**

Source: National Apprenticeship Service, August 2012 (TBR Ref: W6/S4)

Key features of the current offer are:

- North West (23%), South West (19%) and South East (16%) are the three regions with the most Heritage Craft apprenticeships currently available.
- Wood & plant is the group with the most current apprenticeships (112), which is explainable through the relatively large amount of joinery and carpentry apprenticeship vacancies.
- Some apprenticeships can be considered to be "generic" and offer the trainee the opportunity to learn Heritage Craft skills in a multitude of groups. These types of apprenticeships would usually teach the trainee skills in carpentry, painting and decorating, and plastering.
- London and the East Midlands offer the smallest number of Heritage Craft-associated apprenticeships, only contributing 3% and 4% respectively of the current offer.

Though limited, this data on the regional distribution of apprenticeships provides some insight to compare with the regional distribution of the workforce. Table 25 below considers the regional distribution of the workforce in the groups for which apprenticeships are available alongside the distribution of current vacancies.

Table 25: Regional distribution of workforce and apprenticeships

Group	% Distribution workforce[31]	% Distribution apprenticeships
North East	5%	11%
North West	16%	24%
Yorkshire and the Humber	13%	10%
East Midlands	13%	4%
West Midlands	14%	6%
East of England	10%	5%
London	7%	3%
South East	13%	17%
South West	10%	20%
England	**100%**	**100%**

Source: Heritage Craft Mapping Survey 2012 &
National Apprenticeship Service, August 2012 (TBR Ref: W6/S6)

It could be expected that the regional distribution of workforce would be similar to the regional distribution of vacant apprenticeships. However, a comparison between the two demonstrates that this is not necessarily the case and it is possible to classify the regions into three different groups:

- **Surplus apprenticeships:** geographical regions where the percentage distribution of vacant apprenticeships exceeds the current percentage distribution of the workforce (by more than 5%). At present, there are three regions within this category: North East, North West and South West.
- **Surplus workforce:** geographical regions where the percentage distribution of workforce exceeds the current percentage distribution of the vacant apprenticeships (by more than 5%). At present, there are two regions within this category: East Midlands and West Midlands.
- **Matches:** geographical regions where there is relative parity between the percentage distribution of vacant apprenticeships and the percentage distribution of workforce (+/-5%). At present, there are four regions in this category: London, Yorkshire and the Humber, East of England and South East.

Of course, this analysis does not take into account the number of apprenticeship vacancies currently offered, which, at an extremely low 221, would make up only 0.1% of the total workforce. This reinforces the importance of the work undertaken by associations and guilds to advertise and facilitate apprenticeship opportunities, particularly those not related to Modern Apprenticeships.

31 Workforce only in Animal, Clay, Glass, Metal, Paint, Plaster, Stone, Textiles, Wood & plant

5.3.2.2 Apprenticeships started and achieved in allied sectors

As previously noted, only limited information is available on participation in apprenticeships. Data on the number of people undertaking apprenticeships is reported at the level of "Sector Framework", which combines together the various apprenticeship programmes offered in that sector. This means that it is not possible to provide accurate information on the number of people undertaking specific apprenticeships related to Heritage Craft.

For the purpose of the research, data from the National Apprenticeship Service on the number of people starting an apprenticeship in a given year and those achieving an apprenticeship has been obtained for those sector frameworks most closely allied to Heritage Craft.

Table 26 below shows the number of people starting an apprenticeship in an allied framework over the last ten years. Just under 250,000 people have started an apprenticeship in this time period – 222,000 of them either in construction or vehicle maintenance and repair. Across other frameworks, the numbers are much smaller; in many cases they run in tens rather than hundreds.

Table 26: Apprenticeships started by year and sector framework

	Sector Framework	02/03 - 06/07	07/08	08/09	09/10	10/11	11/12*	Total
Various	Construction	81,600	20,400	16,790	14,070	15,590	11,460	159,910
Vehicles	Vehicle maintenance and repair	15,520	12,520	8,900	9,660	9,060	6,830	62,490
Glass	Glass industry	2,700	410	380	480	1,430	1,560	6,960
Vehicles	Vehicle fitting	1,870	1,430	530	630	980	550	5,990
Wood & plant	Furniture industry	2,100	370	310	360	450	360	3,950
Paper	Print and printed packaging	1,700	320	260	210	350	230	3,070
Textiles	Textiles	2,670	180	40	-	-	-	2,890
Metal	Farriery	270	140	100	120	100	120	850
Wood & plant	Trees & timber	190	90	100	110	150	160	800
Metal	Metals industry	380	40	30	30	20	-	500
Textiles	Fashion and textiles	-	-	-	20	90	150	260
Clay	Ceramics	100	-	-	10	10	60	180
Animal	Footwear and leather	60	40	10	-	-	-	110
Textiles	Apparel	60	-	10	-	-	-	70
Precious Metals	Jewellery, silversmithing and allied trades	10	-	-	-	-	50	60
Animal	Saddlery	30	-	10	-	-	-	40
Wood & plant	Set crafts	-	-	10	-	10	-	20
	Total	**109,260**	**35,940**	**27,480**	**25,700**	**28,240**	**21,530**	**248,150**

Source: National Apprenticeship Service 2012 (TBR Ref: W11/S1a) * Year to date, August to April

With the exception of 2010/11, the general pattern has been for the number of apprenticeship starts to decrease from 2007/08 onwards. Given the overlap with the recession, this perhaps reflects a period in which employers were more cautious about taking on apprentices. The increase in 2010/11 is likely to reflect the impact of new policy from the Coalition government to increase apprenticeship numbers.

As might be anticipated, the data on achieved apprenticeships shows a similar pattern, with the majority being completed in construction and vehicle trades and a decline in the number of achievements since 2008/09.

Table 27: Apprenticeships started by year and sector framework

Group	Sector Framework	02/03 - 06/07	07/08	08/09	09/10	10/11	11/12*	Total
Wood & plant	Construction	32,100	12,850	14,250	11,790	9,250	4,020	84,260
Vehicles	Vehicle maintenance and repair	2,300	4,220	6,150	7,380	6,430	3,370	29,850
Vehicles	Vehicle fitting	790	550	320	550	470	350	3,030
Glass	Glass industry	1,220	270	340	250	340	490	2,910
Wood & plant	Furniture industry	1,080	190	240	200	260	150	2,120
Textiles	Textiles	1,430	80	70	10	10	-	1,600
Paper	Print and printed packaging	740	130	150	180	140	100	1,440
Metal	Farriery	130	60	80	90	100	90	550
Wood & plant	Trees & timber	80	20	50	50	80	60	340
Metal	Metals industry	150	40	30	30	20	10	280
Animal	Footwear and leather	30	20	20	10	–	–	80
Clay	Ceramics	60	–	–	–	10	–	70
Textiles	Apparel	50	–	10	–	–	–	60
Animal	Saddlery	20	–	10	–	10	–	40
Textiles	Fashion and textiles	0	–	–	–	10	30	40
Wood & plant	Set crafts	0	–	–	10	10	–	20
Precious Metals	Jewellery, silversmithing and allied trades	0	–	–	–	–	10	10
	Total	**40,180**	**18,430**	**21,720**	**20,550**	**17,140**	**8,680**	**126,700**

Source: National Apprenticeship Service 2012 (TBR Ref: W11/S2a) * Year to date, August to April

Bartholomew Harris, Carpenter
Photography by Briony Campbell

The future of Heritage Craft

The future of Heritage Craft

6 The Future of Heritage Craft

6.1 The size of the workforce in ten years

Forecasted employment over the next ten years estimates that the number of employees in the Heritage Craft sector will have grown by 25,000 people (12%) to a total of 234,600 by 2022.

Stone and Precious metals show a percentage change of almost 50%, with Stone also having one of the highest levels of absolute growth. Metal and Paint, starting from some of the higher bases in 2012, also make a significant contribution to absolute growth. Although small in numbers, growth is also well above average in percentage terms in Vehicles and Guns. The forecast also predicts decline in a small number of groups, with Jewellery seeing the largest decline in percentage terms and Wood & plant in absolute terms.

Forecasted employment over the next ten years estimates that the number of employees in the Heritage Craft sector will have grown by 25,000 people (12%) to a total of 234,600 by 2022.

Table 28: Heritage Craft employment forecast 2012-2022

Group	2012	2017	2022	Change 2012-2022 Absolute	Percent	CAGR*
Stone	8,470	10,255	12,380	3,910	46.2%	3.9%
Precious metals	2,560	3,070	3,665	1,105	43.2%	3.7%
Vehicles	2,530	2,895	3,300	770	30.4%	2.7%
Guns	1,580	1,775	1,990	410	25.9%	2.3%
Metal	30,110	33,090	36,300	6,190	20.6%	1.9%
Paint	40,985	44,115	47,355	6,370	15.5%	1.5%
Textiles	25,710	27,415	29,160	3,450	13.4%	1.3%
Clay	16,550	17,615	18,730	2,180	13.2%	1.2%
Toys & automata	245	260	270	25	10.2%	1.0%
Animal	8,790	9,140	9,450	660	7.5%	0.7%
Glass	9,465	9,725	9,995	530	5.6%	0.5%
Plaster	15,595	15,945	16,260	665	4.3%	0.4%
Paper	7,895	7,865	7,820	-75	-0.9%	-0.1%
Wood & plant	34,710	34,410	34,065	-645	-1.9%	-0.2%
Instruments	3,735	3,605	3,470	-265	-7.1%	-0.7%
Jewellery	450	415	385	-65	-14.4%	-1.5%
Total	**209,810**	**221,585**	**234,600**	**25,215**	**12.0%**	**1.1%**

Source: TBR Observatory 2012 (TBR Ref: W1/S6)

* CAGR = Compound Annual Growth Rate

Despite this positive forecast, most of the in-depth interviewees were pessimistic about growth. To a certain extent the objective of the in-depth interviews was to provide contrasting information, so this incongruity could perhaps be expected. However, that a number of them perceived the future to be "gloomy" serves to demonstrate that the sector will need support to secure this forecasted growth. Market conditions must be at least sustained, if not improved, in order to achieve these rates of growth. The interviews highlight the challenges that supporting businesses face and identify potential market failures that support organisations could intervene to resolve and/or prevent.

This challenge was exemplified in the interviews in Guns and Stone; based on historical trends and forecasts, both of these groups are anticipated to grow. However, for some businesses, there are prevailing conditions that will prevent this. For example, legislation was a major issue:

"Legislation has seriously challenged the trade. Hungerford in 1987, Dunblane in 1996 and more recently the cinema shooting in Aurora, Colorado, all impact negatively on the trade. They shatter confidence and cause the loss of jobs."

There was a general consensus amongst Guns interviewees that "the trade is in decline [demonstrated by] the lack of opportunity for training [and] the lack of skills amongst youngsters leaving school."

Forecasted growth in Stone

The highest increases in employment, suggested by survey forecasts, were in the Stone trade. However, interviewees' anecdotal evidence suggests that the situation facing the Stone trade is more complex than is implied.

One contractor, whose business was in masonry and other stonework and for whom Heritage Craft represented a minority interest, envisaged expanding:

"We're likely to go on with the handcrafted work… We're thinking of doing more architectural work, windowsills and pillars. But we won't be able to do it for a while."

This plan depended on the company taking on an experienced craftsman, but they were finding this difficult. This suggests that, at the time of our research (summer 2012), few skilled stonemasons were looking for full-time employment.

However, this picture did not hold true everywhere. A major factor mitigating against employment in stonemasonry is building trends:

"Very little new building uses natural stone now – it's usually only for prestigious jobs. The trade has been declining for a number of years… It will die."

The low status attributed to stonemasonry is also considered to be a disincentive to those potentially entering the trade:

"Sometimes we're treated with contempt. Stonemasonry is dirty work. My husband's not been allowed to order in a pub; we've had a vicar assuming that my son was stripping the church roof, when he was actually repairing it."

In the time between the quantitative telephone survey and the qualitative interviews, another interviewee, whose business specialised in stone cleaning and restoration work, had revised his opinion about future growth. Having initially envisaged his workforce as likely to grow "slightly", he now considered the nature of employment in the sector to be "fragile". The uncertainty of contracts mitigated against his taking on more employees:

"We can't give people jobs that don't exist. For example, we won a significant contract, we were ready to start, and took on new people. We were due to begin on the Monday, but the previous Friday they rang to say that they'd found someone else who could do it more cheaply. It meant not employing the new lads and letting some of the others go."

6.2 The sector's view on growth prospects

Overall, the survey found that there is cautious confidence within the Heritage Craft sector for the forthcoming two to three years; 34% of businesses expect some growth in demand, 38% expect that demand will remain at the same level, and only 16% expect demand to decline.

Toys & automata have the most positive outlook on demand, with two-thirds of businesses anticipating considerable growth in demand and only 5% anticipating any decline. Whilst Paint has the next highest proportion of employers anticipating considerable growth in demand (42%), it is also the most mixed group in terms of demand expectations: 21% anticipate a considerable decline and 24% cannot predict a future. This, in addition to the fact that 75% of turnover comes from local customers (Figure 9, page 60), is likely to suggest a highly variable market, driven by localised conditions, such as variability in the housing market and income levels.

The only sector to predict a greater level of decline in demand than growth is Plaster, where 25% of employers anticipate a decline in demand and 12% anticipate an increase.

Most other groups are generally cautious about changes in demand. Very few note a below average expectation for demand to remain the same (only Precious metals, where 79% anticipate slight growth in demand and, as previously mentioned, Toys & automata and Paint) and most are more likely to anticipate slight growth in demand, rather than considerable (exceptions other than Toys & automata and Paint being Boats and Leather).

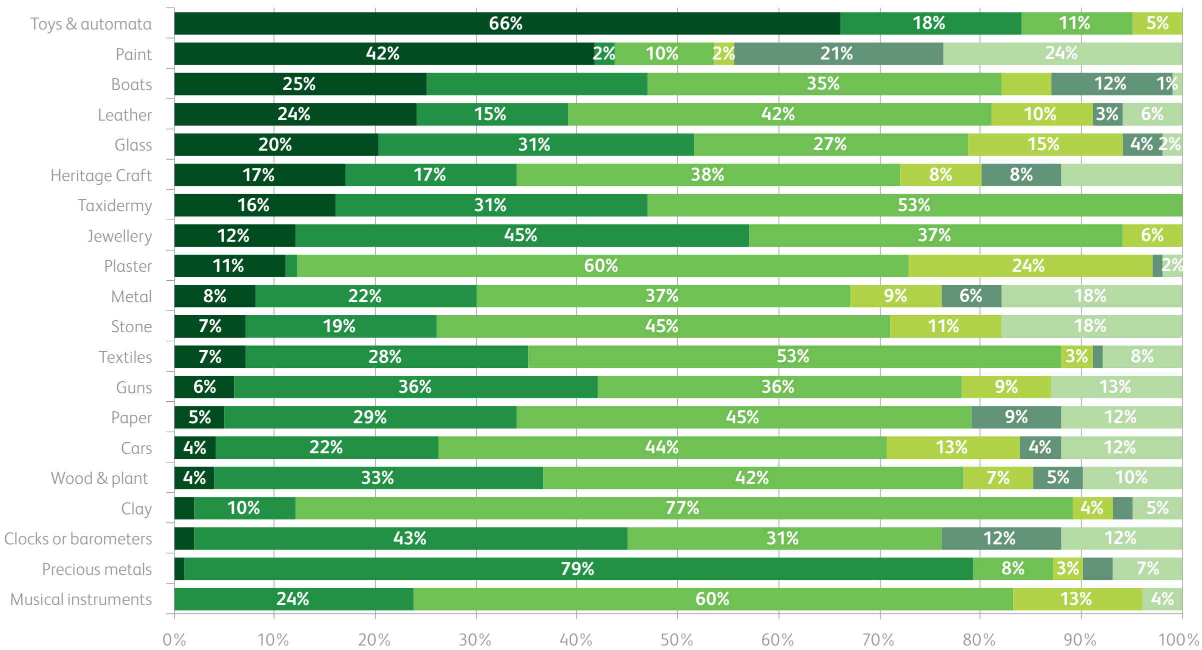
The two clockmakers who were interviewed, and whose businesses are based on retail and repair, reflected this cautious approach. They associated the recession with changing attitudes to heritage objects. Even in the period of this research (spring/summer 2012), some interviewees' businesses had contracted:

"There's been a notable decrease in footfall. Everybody I speak to [in other similar businesses across the country] says the same. Why? The current economic climate makes people feel insecure – not wanting to spend at the moment. People are very cautious with their money. A lot have no money full stop, and those that have [money] are being cautious."

"I'm not getting any enquiries from people wanting to buy clocks. People used to buy clocks for weddings and anniversaries. The repair side is ticking along as it has always done. I can look three to four weeks ahead and see no orders, and then something comes in. That hasn't changed in 25 years."

"The market itself is also changing: A lot of my customers are getting quite elderly... The younger generation buy/value different things and don't value old things or get things repaired. The older generation invested in status objects."

Figure 12: Demand expectations by group



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/C2)

1. Grow considerably
2. Grow slightly
3. Remain the same
4. Decline slightly
5. Decline considerably
6. Don't know

Liz Emtage, Ceramicist
Photography by Briony Campbell

The views on anticipated demand also vary depending on the size of the previous year's turnover. Those that had either had a small turnover (£50,000) or large turnover (£1m+) were more confident. Those with a previous turnover of £500,001 to £1m were the most likely to anticipate that demand would remain the same, and those with a turnover of between £50,001 and £100,000 were the most likely to anticipate that demand would decline considerably.

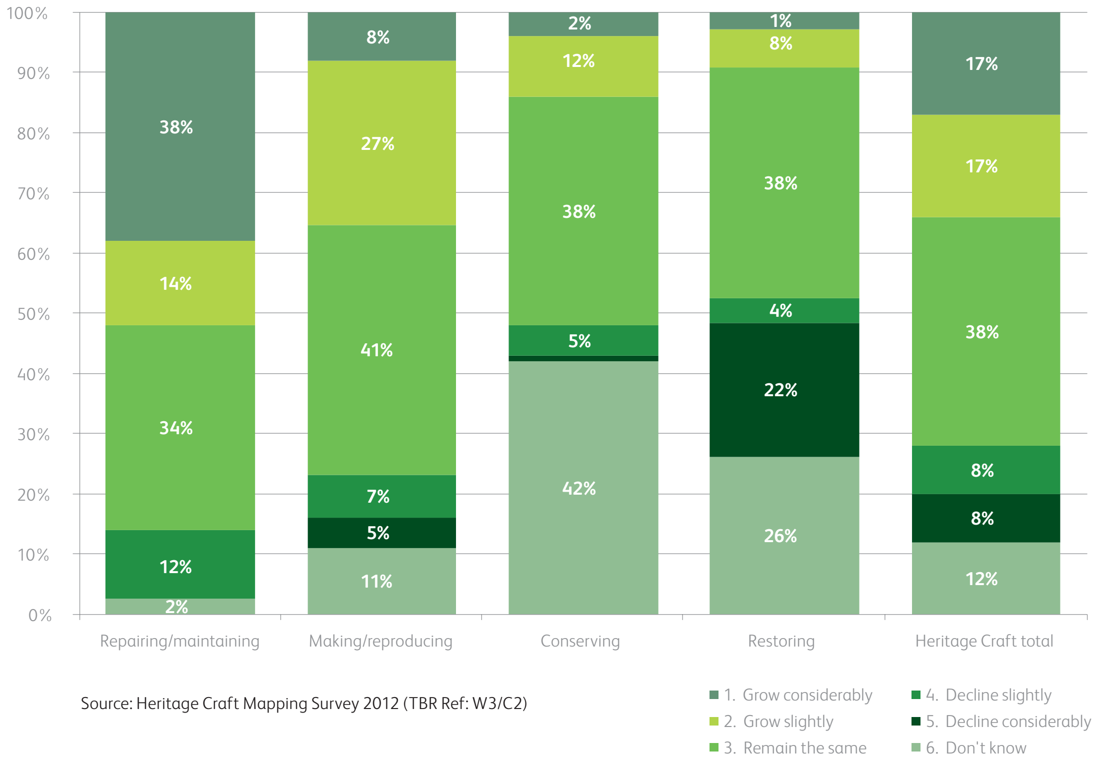
Table 29: Anticipated growth and last year's turnover

Growth expectation	Sector Average	Up to £50,000	Between £50,001 and £100,000	Between £100,001 and £500,000	Between £500,001 and £1m	Over £1m
Grow considerably	17%	24%	10%	15%	14%	30%
Grow slightly	17%	13%	17%	27%	20%	26%
Remain the same	38%	35%	53%	30%	57%	35%
Decline slightly	8%	6%	8%	8%	2%	2%
Decline considerably	8%	11%	11%	2%	-	2%
Don't know	12%	11%	2%	18%	6%	5%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4)

Views on the market position also differ depending on the main activity of the business. Particularly interesting here is the proportion of businesses in conserving and restoring which are unable to predict what the next two years will look like. Those repairing/maintaining things are significantly more likely to anticipate considerable growth in demand (38% compared to 17%), and although some slight decline is anticipated, no businesses with this as a main activity anticipated considerable decline.

Figure 13: Growth expectations by main activity



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/C2)

In terms of the drivers behind this anticipated growth, the most prominent causal factor noted by businesses was changes in the state of the economy, followed by increasing awareness/recognition of their brand.

Market conditions in Wood & plant

For Wood & plant businesses, expectations of growth or decline as linked to the state of the economy appeared to vary according to location and client and customers' income brackets.

In the South West, for example, one interviewee described their main concern as surviving:

"It is very fraught at the moment and the recession has had a big impact on both sides of the business … Retail is down 60% this year, and joinery [is] down 70%... Work I've estimated for is not being commissioned and [other] work is being cancelled. When I ask people, they say that what I'm making isn't essential (e.g. bookshelves) and they've got less money coming in.

I've two types of client. Wealthy people, who aren't affected [are] still buying when they see something they like. The family side and middle-classes aren't buying. I'm hearing this every day. Two years ago, people were buying.

I've also noticed a big move away from using credit cards to buy things – [people are paying by debit [card instead]. There's less [buying] on a whim." – Wood and plant interviewee

In contrast, two interviewees based in the South East and East of England noted that:

"The recession has had no impact and, if anything, business is growing… Over the last three years, I've taken on large projects and subcontracted. This is to develop the business, so that there's enough work for my son and me when he joins the business."

"East Anglia is a very good place to be for my work – there are a lot of large houses full of antique furniture, and clients just go through the house having things restored and repaired." – Wood & plant interviewees

The impact of the recession on the supply chain for Wood & plant businesses is significant. Several interviewees associated the decline in their businesses with those in the housing market and antiques trade. Some directly blamed housing professionals:

"Business would be better – and there is business out there – if solicitors, banks and estate agents would get their houses in order and get on with the job instead of delaying. This is affecting the removals side, which has an impact on the restoration: when people move, they often decide to have some restoration work done." – Wood & plant interviewee based in the South East

Owen Jones
Photography by Robin Wood/Heritage Crafts Association

“47% of Heritage Craft businesses that anticipated growth expected this change to be caused by a shift in the wider economy.”

Table 30: Reasons for anticipating growth

Factor	Heritage Craft Average
Changes in the state of the economy	47%
Increased recognition/awareness of brand	18%
Changes in the market for Heritage Crafts and/or conservation	8%
The business will be reaching a wider domestic market	8%
Lack of competition from other similar businesses	6%
A diversification in our range of products/services	2%
Increased consumer demand for my products/services	2%
Marketing and advertising	1%
The business will be reaching a wider market through exporting	1%
Improved access to private finance	*
Greater online presence	*
Improved access to public funding	*
Other	16%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W4/S2)

* = figure less than 0%, but not 0

Businesses which stated that changes in the state of the economy would result in an increase in demand were asked to specify what change would result in an increase. Almost half of these (49%) felt that economic growth and the recession lifting would be positive for them. Other responses included people have more money to spend (14%) and the recession being "good for business" (7%) – the latter being related to customers seeking to restore or repair items rather than buy new.

Where respondents noted changes in the market for Heritage Crafts and/or conservation as a driver of increased demand, they were also asked to expand on what changes they felt would occur. Answers included: an increase in the popularity of Heritage Craft; general growth in demand for their products/services; or, in some cases, the ageing workforce meaning that a smaller pool of individuals with specialist Heritage Craft skills exists and therefore demand for their skills is increasing. Table 31 below shows the variation in drivers of growth for the different Heritage Craft groups. The top drivers in each group are shaded. This helps to demonstrate that, whilst the importance attributed to changes in the economy having a positive impact can be seen across the board, the importance of factors can vary by group.

Table 31: Reasons for anticipating growth by group

Factor	Heritage Craft	Boats	Cars	Guns	Clocks and barometers	Jewellery	Musical instruments	Toys & automata	Taxidermy	Clay	Glass	Leather	Metal	Paper	Precious metals	Stone	Textiles	Wood & plant	Paint	Plaster
Changes in the state of the economy	47%	32%		33%	8%	48%		6%		40%	34%	17%	47%		82%	53%	37%	72%	48%	9%
Increased recognition/ awareness of brand	18%				35%	10%		6%			*	2%	11%		1%		4%	3%	48%	
Changes in the market for Heritage Crafts and/or conservation	8%		21%		4%	10%	2%	9%		1%		15%	18%		11%	17%	6%	23%		
The business will be reaching a wider domestic market	8%					10%	46%		33%	36%	39%	11%	2%	15%		7%	14%	6%		
Lack of competition from other similar businesses	6%		16%	33%	27%		7%			7%	4%	9%	7%	68%	9%	4%	15%	6%		
A diversification in our range of products/services	2%				8%	10%				4%	1%		18%	1%		3%	*	1%		
Increased consumer demand for my products/services	2%	26%		8%			44%			1%	6%	6%	3%	13%	1%	6%	1%			
Marketing and advertising	1%									7%	3%	2%	6%				5%	*		
The business will be reaching a wider market through exporting	1%		29%	4%							3%		2%				4%			
Improved access to private finance	*				27%													1%		
Greater online presence	*												*	5%			2%			
Improved access to public funding	*															2%				

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W4/S2) * = figure less than 0%, but not 0

Only 16% of businesses are anticipating a decline in demand for their products/services. Where this is the case, it is mainly driven by the state of the economy. For these businesses, the recession was anticipated to continue to have a negative impact on the business, with people having less spending power. A small proportion noted that the increase in VAT would continue to have an impact.

Table 32: Reasons for anticipating decline

Factor	Heritage Craft Average
Changes in the state of the economy	42%
Pro-actively reducing workload as near retirement	36%
Too much competition from other similar businesses	10%
Changes in the market for Heritage Crafts and/or conservation	9%
Competition from international businesses	8%
Decrease in the level of lottery funding	5%
Reduced access to finance	1%
The business will not be able to reach a wider market through exporting	1%
Reduced availability of materials	*
Reduced access to public funding	*
Lack of diversification in our range of products/services	*
Other	13%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W4/S2)

* = figure less than 0%, but not 0

The issue of international competition was identified specifically by one piano business:

"We are losing a lot of specialist manufacturers. China has taken a lot of the custom away from this country. We made better quality [instruments] that lasted longer. We don't make pianos in this country anymore. Yamaha closed their workshop which was very efficient. Someone should step in… We need a viable business… It should be looked at."

Although of limited interest to this research, one Stone interviewee also referred to the impact of reductions in public funding:

"Restoration and conservation have been supported by funding from English Heritage and the National Trust. The work benefitted quarries and created many jobs on churches and big country houses. But lots of that money has now gone to the Olympics – so people in the trade who benefitted are being laid off. The trade is unlikely to get those people back."

Supply of raw materials

Materials have a fundamental impact on the values and skills of Heritage Crafts as well as the sustainability and resilience of Heritage Craft businesses.

Gun trade interviewees identified issues of quality, availability, cost and regulation – matters that were also raised by other craft sectors.

The source of materials alone highlights international connections across the sector:

"It's becoming harder to get the quality of steel required from the Eastern Bloc, China and India. Everything else is within my control – but not that."

"Problems with steel quality and consistency may be to do with steel being recycled. These problems didn't occur previously. Since we [as a trade] only use small amounts, the [steel] industry isn't going to address that."

"We have difficulties with lubricants – these are very old-fashioned. We are now falling foul of laws because of their chemical content, and we suffer from what the EU calls the "precautionary principle"[32], and materials are banned as a matter of course."

Stonemasons also commented on the import of, for example, granite from China and India. In the UK:

"Suppliers, including quarries, have closed."

"Quarries are having planning problems: government legislation is a real problem."

Environmental protection is a particular issue for crafts that use wood and plant materials:

"Saltwater rush is now no longer available and I have to use freshwater [from Portugal], which is not such good quality. This is because the areas where it's grown are protected as national nature reserves. Germany and Holland were the main sources."

Overseas economic development policies are also impacting on supplies:

"The Indonesian Government has just put a ban on the export of rattan to protect their own furniture industry. Most rattan was being exported to China for furniture. Indonesia grows about 80% of supplies, with 20% from elsewhere, which is not of such good quality. There was already an environmental issue with deforestation and so less land [is available] for growing rattan."

Far from operating within a narrow, heritage context, Heritage Crafts are clearly subject to current industrial processes and policies. The implications include questionable business sustainability, the potential loss of skills and that Heritage Craft sectors perceive they are too small or not significant enough to have any control or impact on wider economic policy decisions.

32 The precautionary principle or precautionary approach states that if an action or policy has a suspected risk of causing harm to the public or to the environment, in the absence of scientific consensus that the action or policy is harmful, the burden of proof that it is not harmful falls on those taking the action. (http://en.wikipedia.org/wiki/Precautionary_principle)

6.2.1 Changes to the business driven by demand

6.2.1.1 Increased demand

When considering the changes required to the current workforce in order to meet an increase in demand (Table 33 below), three different types of action rise to the top, each noted by approximately one-third of businesses:

1. No action. Just over one-third (34%) of businesses felt that they would not need to make any changes. This would suggest that these businesses are currently performing under capacity and the increase in work would be met by fully utilising the resources available.
2. Increase working hours/improve use of working time. Just under one-third of businesses felt that they would need to either increase the number of hours their staff worked (22%) or increase the productivity of their skilled craft workers (10%).
3. Recruit. Whilst there are variations in what type of employee would be recruited, just over a third (34%) would need to undertake some form of recruitment. Most commonly there was a need to recruit people into non-craft roles. When probed as to which roles these might be, employers mainly commented on administrative functions or sales and marketing.

Given the previous comments from the in-depth interviews about the challenges associated with employing staff, it is perhaps surprising that recruiting features so highly. However, it is interesting to note that appointments are more likely to be to support non-craft activities, which (one assumes) would enable craft workers to increase input into craft tasks.

As previously noted, interviewees were reluctant to take on employees and were more likely to subcontract. This allowed one Wood & plant business to deal with increased demand while avoiding the perceived bureaucracy of employing staff:

"In the town, there are six or seven other woodworking businesses. We all know each other. Last year I had a very large contract for architectural work in a hotel in Paris that had to be completed in a month. I did some of the work and subcontracted the rest."

Table 33: Actions required to meet increased demand

Actions	% Response
Will not need to make any changes	34%
Need to increase the number of hours that staff work	22%
Need to recruit additional people into business functions other than craft	17%
Need to recruit additional permanent paid full-time skilled craft workers	10%
Need to increase the productivity of my current skilled craft workers	7%
Need to collaborate more with other craft businesses to deliver work	5%
Need to recruit additional permanent paid part-time skilled craft workers	4%
Need current skilled craft workers to develop new Heritage Craft skills and knowledge	3%
Need to use additional casual skilled craft workers	2%
Change premises to create more space	2%
Need to recruit additional fixed-term skilled craft workers	1%
Need to recruit to replace skilled craft workers who are likely to retire soon	1%
Need current skilled craft workers to multi-task across different craft skills	1%
Changes/improvements to machinery	1%
Reactively reduce commitments at peak times	1%
Recruit additional skilled craft workers (unsure as to type of employment)	1%
Need to use additional unpaid skilled craft workers	*
Need current skilled craft workers to develop new non-Heritage Craft skills and knowledge in other business functions	*
Need current non-craft workers to develop new skills and knowledge in other business functions	*
Need to recruit to replace skilled craft workers who leave to work elsewhere	*
Need current skilled craft workers to multi-task across business functions	*
Need current employees to develop new skills and knowledge	*
Don't know	2%
Other	9%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W4/S3)

* = figure less than 0%, but not 0

In general, this pattern of response (no action, increase working hours and productivity/recruitment) is replicated across the different groups, with a few exceptions:

- Businesses working in the Vehicles group are also likely to note that a change in premises to create more space will be required.
- Businesses in Guns, Toys & automata and Wood & plant have a higher tendency to note the need for collaborating with other businesses.
- Jewellery and Leather businesses note that they will need their current skilled craft workers to develop new Heritage Craft skills and knowledge.
- Taxidermy businesses are more likely to reduce commitments reactively at peak times.

However, having to deal with employment legislation and concerns about inconsistent income are key barriers to expanding the workforce:

"I have considered expanding the business and taking on people. I have tried taking on people a few times over the years. However, it needed a step change and involved understanding things I don't understand, and a commitment to paying a weekly wage regardless of business. There have been times when I have had barely enough to live on so it frightens me to take on that responsibility."
– Clocks interviewee

6.2.1.2 Decreased demand

Across the small proportion of businesses in the sector that felt that they were likely to experience decreased demand, the most common response to this was to close the business (14%). Whilst 8% of respondents with decreasing demand felt that they would not have to make any changes, 12% felt that they would need to reduce the size of the workforce in some way, 6% would not replace workers who left the business (either through retirement or leaving for other reasons) and 3% said they themselves would retire. This pattern of response was replicated across the different Heritage Craft groups.

Two of the Wood & plant interviewees described responding to the fall in demand by diversifying and carrying out extra marketing:

"We have diversified into hotels, as there are fewer private clients than [there] used to be. In the recession, hotels have been having a lot of restoration work done. It's not always the sort of work we like, but it pays the bills."

"A year ago, I made up packs saying what I did with images and distributed them to about 300 people. I've had a small percentage take-up, mainly from interior designers and shops."

Table 34: Actions required to counter decreased demand

Actions	% Response
Will have to close the business	14%
Will not need to make any changes	8%
Will have to reduce the amount of work I do in the business and find another source of income	6%
Will not seek to replace skilled craft workers who are likely to retire soon	5%
Need to reduce number of permanent paid part-time skilled craft workers	3%
I will retire	3%
Need to collaborate more with other craft businesses to deliver work	2%
Need to reduce number of permanent paid full-time skilled craft workers	1%
Need current skilled craft workers to develop new Heritage Craft skills and knowledge	1%
Need current skilled craft workers to develop new non-Heritage Craft skills and knowledge in other business functions	1%
Will not seek to replace skilled craft workers who leave to work elsewhere (but do not retire)	1%
Need to reduce the number of hours that staff work	1%
Need to reduce number of fixed-term skilled craft workers	*
Need to reduce number of casual skilled craft workers	*
Don't know	1%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W4/S3)

* = figure less than 0%, but not 0

Business succession is an important aspect of the continuation of skills. Many interviewees predicted that their retirement will be synonymous with closing down their businesses, since there is no-one to take over the running of it or to purchase it. With a few exceptions, their children have not chosen to come into the business: this includes those businesses that have been in the family for several generations. Equally, parents are concerned that their children will not be able to earn a living in Heritage Crafts.

"The business is 55 years old and was started by my father. I won't be handing it on as there is no-one to hand on to. No-one's interested in taking it on." – Clocks interviewee

"I am the sixth generation to work in wood and it would be nice if my sons or daughter followed. I have my doubts as to whether they will and I wouldn't foist it on them. I don't want to be the last in the family working with wood. On the other hand, I wouldn't necessarily encourage them. The job isn't what it used to be. The IKEAs and B&Qs have knocked the industry to bits. The quality isn't there. People buy a £60 bookcase in IKEA. When it doesn't fit the alcove at home they come to me and baulk at £400 for labour and quality. People don't understand what's involved." – Wood & plant interviewee

"I decided not to involve my son: this wasn't the environment or the future that I wanted for him. I worry that, in 20 years, there will be no living to be made from it." – Guns interviewee

Networks and business support

Across the wider cultural and creative industries, networks are regarded as integral to economic development.

Most businesses have informal networks across similar businesses and other trades – for example, across furniture and antique restoration, suppliers, architects and interior designers, and their clients. These informal networks can be local, regional and national. They provide a source of knowledge and support business development.

Being part of a formal trade association or professional network brought business benefits to members, including professional development, promotion, access to advice, the ability to represent group interests, and skill recognition.

"We have trade membership of the British Association for Shooting and Conservation and The Gun Trade Association. This is useful in terms of knowing where to go for help and advice on legal matters, importers, etc. They represent us at government level." – Guns interviewee

"I am a yeoman of the Worshipful Company of Basketmakers. I was very pleased to be nominated. You can also apply and submit work for assessment." – Wood & plant interviewee

However, not all interviewees recognised the value of memberships. Their main issues were relative cost and insufficient support.

"I'm not a member of any trade association. I don't think they are of any great use as far as I can see: you pay a large subscription and get a magazine." – Wood & plant interviewee

Around half of the interviewees were aware of non-specialist business support organisations. Their views about these were mixed – mainly to do with relevance and eligibility for support. The Federation of Small Businesses (FSB) was viewed positively. One interviewee suggested that Heritage Craft should have a higher profile within that organisation.

"It's run by people who have been in business… [It is] useful because [it is] a large organisation and has the opportunity to speak to ministers and get things done." – Clocks interviewee

"I'm a member…and use their legal advice service, which is good. I use other FSB members' businesses – for example, a computer person in town, although I haven't said to him that that's why [I use him]." – Wood & plant interviewee

A number of interviewees were, or had been, involved in local trade and business organisations, also reflecting the businesses' view of being part of and contributing to a wider community:

"I'm a member of the local Chamber of Commerce, which is in its infancy… The benefit is…that they'll have more influence than I would on my own. For example, I suggested we go to the council and ask them to have free parking in December. The council wouldn't entertain [the idea] if it was just me."
– Wood & plant interviewee

Heritage Craft businesses appear to be aware of the opportunity to get financial support, and a small number of interviewees had taken advantage of this. But most interviewees were wary of taking out loans and getting into debt.

"I used a start-up scheme. It helped me a lot."
"The bank supported me with an overdraft... That's the only kind of financial support that I've received."
"I wouldn't do it again. You can't do it if you can't predict how much is going to come in on a monthly basis."
– Guns interviewees

Unsurprisingly, networks and business support are of value and benefit if they are regarded as being relevant and responsive.

6.3 Legacy and passing on skills and knowledge

Overall, the majority (77%) of businesses in the Heritage Craft sector do not undertake activities to pass on craft skills and knowledge to people outside of the business.[33] The number of people working in the business appears to be a determining factor regarding the transfer of craft skills and knowledge to other people, with the larger firms (51+ employees) more likely than smaller firms to undertake activities to do so.

Table 35: Transferring skills and knowledge to people outside of the business

Participates in activities to transfer skills and knowledge to people outside of the business	% response	People working in the business 1	2-10	11-50	51+
		100%	100%	100%	100%
Yes	23%	22%	29%	33%	50%
No	77%	78%	71%	67%	50%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4)

33 "People outside of the business" was specifically defined in the survey as anyone who is not currently working in any capacity (paid or unpaid) for the business.

This is perhaps to be expected, as anecdotal evidence suggests that sole traders find it difficult to create the time for such activities. In order to explore the reasons for not doing additional work to promote the transfer of Heritage Craft skills, those who did not participate in any such activities were asked whether they would like to do so. Table 36 below shows that 27% of businesses feel that lack of time prevents them from engaging in such activities. Interestingly, time is less of a factor for sole traders than for larger businesses.

Table 36: Reasons for not transferring skills and knowledge to people outside of the business

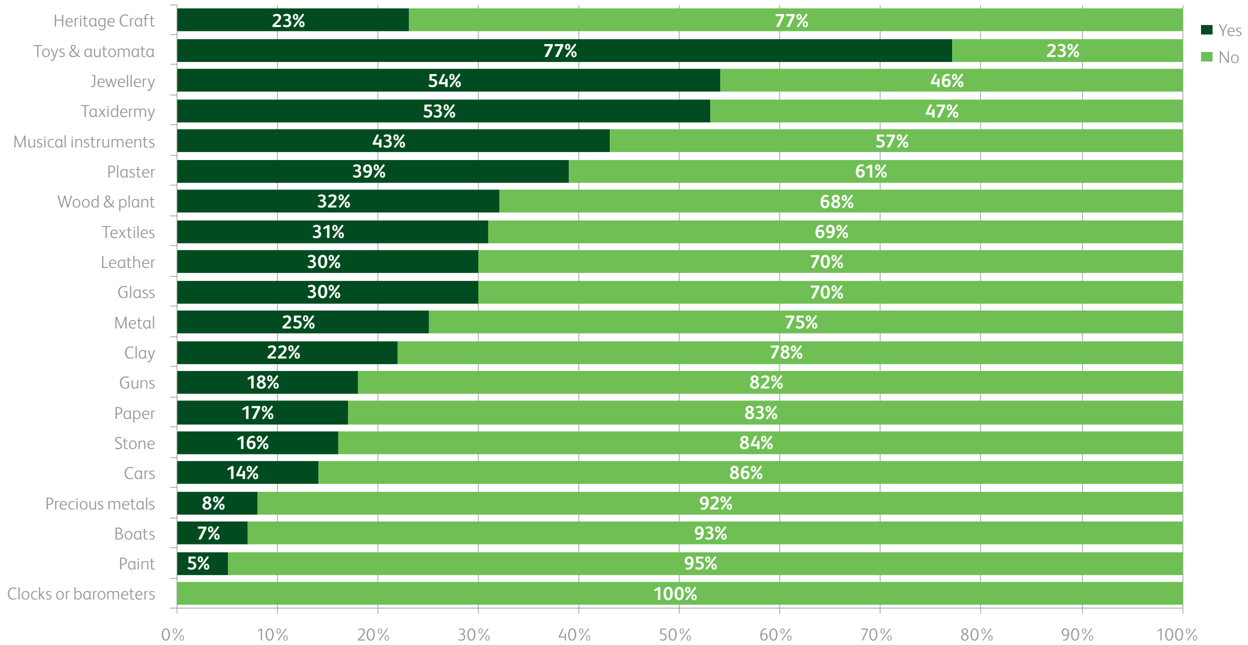
Would you like to do any activities to pass craft skills and knowledge on to other people outside of the business?	Number of people working in the business				
	1	2-10	11-50	51+	Heritage Craft Total
Yes, I just don't know how to get involved/what the opportunities are	9%	9%	1%		9%
Yes, I just don't really have the time	5%	18%	9%	24%	7%
Yes, but the cost would be prohibitive for us	3%	3%	6%		3%
Yes, other	17%	8%	14%	15%	15%
No, I don't see the need to	17%	15%	25%	35%	17%
No, I know I don't have time	20%	19%	16%	8%	20%
No, other	29%	28%	30%	19%	29%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S7)

The majority of "other" responses from those who would like to undertake this kind of activity noted that they were planning to do so in the future, or that they would be happy to do so but they perceived there to be a lack of interest in such activities. For those who did not want to participate in such activities, "other" responses were overwhelmingly focussed around concerns about "training up the competition" or, again, a perceived lack of interest for such activities.

The extent to which activities are undertaken varies considerably across the different Heritage Craft groups, ranging from 0% in Clocks and barometers to 77% in Toys & automata.

Figure 14: Businesses undertaking activities to pass on skills and knowledge by group



Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/C5)

The most popular method of passing on skills and knowledge is to teach informally and free of charge, with 30% of respondents stating that they do this. Another popular practice is to provide formal apprenticeships (18%).

Table 37: Activities taken to transfer sector's skills and knowledge

Activities undertaken	% respondents
Teach informally on an individual basis, free of charge	30%
Providing formal apprenticeships	18%
Providing work experience/placements	11%
Teaching classes with accredited qualifications	11%
Paid tuition without qualifications	7%
Providing informal apprenticeships	5%
Participating in shows and events where the public can see/participate in the craft	5%
Participating in informal sharing/demonstrations at events organised by craft guilds and societies that are not open to the public	2%
Other	26%

Source: Heritage Craft Mapping Survey 2012 (TBR Ref: W3/S4, Q28)

"Other" activities included teaching family members, offering informal mentoring or ad-hoc advice, and providing workshop tours and open demonstrations.

Conclusion

Conclusion

7 Conclusion

Heritage Craft constitutes a broad range of activities and work and, as such, has proven difficult to define, either through top-down economic intervention or by the sector itself. As there has previously been no set definition for Heritage Craft, and no way to measure it, there has been no economic or demographic data by which to judge performance, benchmark the sector or examine its characteristics. Through Mapping Heritage Craft, there now exists a detailed, robust evidence base that delves in depth into Heritage Craft activity across England, enabling a new understanding of the sector, its workforce and potential future importance.

The sector provides employment for 210,000 people, delivers just over £10 billion in revenue and £5 billion in GVA. These businesses employ 170,000 people who use Heritage Craft skills and knowledge for the majority of their working time and most are optimistic that demand for their products, goods and services will either grow or remain stable in the short term.

There are challenges, though, to maintaining stability and enabling growth, and the in-depth interviews highlighted the difficulties businesses face in planning beyond the very short term. Employment legislation is a significant barrier, with many preferring to subcontract or collaborate and split the value of a contract/project which requires a greater capacity than that currently available in the business, rather than taking on the permanent commitment of additional staff.

Despite this, one-third of employers anticipating growth do expect that they will need to recruit in order to meet this increased demand. This outlook is reinforced by the forecasting data, which estimates that the sector's employment footprint will grow by 12% over the next ten years, with an annual growth rate of 1%.[34]

The research has underlined the value and importance of apprenticeships to the sector, which relies heavily on the process of learning by doing. At some point in their lives, 30% of those currently working in the sector have undertaken an apprenticeship and these are highly valued in terms of providing skills and knowledge. However, concern is expressed about declining interest (particularly amongst young people) in apprenticeships as a route into the sector, which is further compounded by a perceived "negative attitude to[wards] people who want to work with their hands".

In order to address issues such as this, raise the profile of the sector and ensure its legacy, a number of businesses participate in activities that specifically pass on their skills and knowledge to people outside of the organisation (for example, by teaching informal classes, or providing tuition). The number of businesses engaged in these activities could be higher as many were unaware of the demand for them, or did not know how to get involved.

As noted in the introduction, this report is the first stage in a process designed to support the strategic development of the sector. The issues and questions it raises will form the basis of debate and review in the next stage of action planning by Creative & Cultural Skills, in partnership with the sector and government. However, this is an important line in the sand, a grounding of evidence which both the sector and other bodies can use as a starting point from which to move forward.

34 Compound Annual Growth Rate (CAGR)

Appendix

Appendix

8 Appendix

8.1 Detailed methodology

As noted in the introduction, a lack of data on the Heritage Craft Sector presented a need to conduct work on economic data within this field. This was partially the result of the lack of a clear definition (as discussed in Chapter 2), responsibility for the development and delivery of support for the sector falling across different organisations and agencies, and the absence of a straightforward way to measure the footprint of the Heritage Craft sector.

This chapter of the report deals specifically with the last of these challenges and the methodology developed to address it, before moving on to provide details on the approach taken in other elements of the research, specifically the qualitative consultation and the supply mapping.

8.1.1 Mapping the size of the sector

As shown in Chapter 2, Heritage Craft cuts across a number of industries/sectors and is typified by niche, often small-scale, activity. This presents a number of challenges:

- A traditional economic map of a sector or industry would usually employ the secondary data and statistics produced by the Office for National Statistics or specific government departments[35]. However, the standard sources of secondary data used to measure other sectors are not appropriate because the Standard Industrial Classification/Standard Occupational Classification (SIC/SOC) systems are not detailed enough.[36]
- Many businesses are relatively informal and are combined with their proprietors' other paid employment or business activities. As such, they are often overlooked in surveys such as the Labour Force Survey or Annual Population Survey which are based on main profession and earnings.
- The nature of the sector is such that a high proportion of businesses are not visible in official data sources. For example, they do not pay VAT, are not PAYE registered, are not a formally registered business or do not list their business in a directory. As such, they are often excluded from secondary data sources[37] or do not appear on business listings/databases that can be used to substitute SIC/SOC-based secondary data.
- Whilst a variety of guilds, livery companies and societies exist, businesses and practitioners are not required to register with them in order to practise. As such, take-up is patchy and multiple memberships are possible and frequent. In addition, membership of organisations tends to be for the individual rather than the business, and as such is open to amateur as well as professional members. This means that it is not possible to use membership levels as an accurate measurement of sector/workforce size.

35 For example, Annual Business Survey (ABS), Business Register & Employment Survey (BRES), Annual Population Survey (APS), Labour Force Survey (LFS), the Inter-Departmental Business Register (IDBR).
36 However, it is important to note that this does not mean the SIC/SOCs are of no use – rather that they cannot be used alone.
37 For example, the ABS does not count sole traders in its employment data.

The complexity of the Heritage Craft footprint also means that these challenges are not consistent across the board, i.e. not every activity is subject to the same measurement challenges. However, it is possible to follow a methodology founded on the principle of utilising a number of analytical steps in order to generate the best estimate of the Heritage Craft population, which is valuable and helpful when there is no single technique for estimating the population.

The method employed six main steps as follows:

1 Creating a master database of Heritage Craft makers, practitioners and businesses using data available from associations/guilds/membership bodies.
2 Utilising keyword searches on a business dataset to identify Heritage Craft businesses and their economic activity.
3 Applying weights to this "known universe" of businesses and makers to scale this up to a population estimate.
4 Undertaking a survey of 762 Heritage Craft businesses, and then weighting survey results to the population in order to deliver specific data on the nature of activity, business performance and needs.
5 Using SIC-based data (from ONS data sources) to model data on GVA and workforce demographics.
6 Using historic trend data on employment and standard forecasts of anticipated performance in order to estimate a likely future employment footprint.

To successfully execute the methodology, the research had to follow a set process so that the information produced at each stage could feed into the next. The process for the research is summarised in the following flow diagram:

Figure 15: Method flow diagram

Determine paper definition

↓

Undertake steps 1 & 2 to develop a database of as many of these types of business as possible

↓

Review outputs from steps 1 & 2 and rationalise paper definition based on what it is possible to capture

↓

Undertake step 3 to create a population estimate based on the measured definition

↓

Undertake step 4 to validate the population estimate and gather data from businesses

↓

Review outputs from steps 3 & 4 to produce the final population estimate for the sector

↓

Undertake step 5 using final population estimates to produce data on workforce demographics and GVA

↓

Undertake step 6 using final population estimates to produce future employment forecast

Each of these steps is explained in more detail in the following chapters.

8.1.2 Creating a master database of businesses

Steps 1 and 2 of the process are concerned with drawing together as much data as possible on "visible" craft practitioners and businesses. "Visible" in this study refers to those businesses that have a presence that can be picked up through their membership of a trade association/guild, advertising with a generic craft association/website, or are captured on a business database.

Step 1 was delivered by undertaking a process of web harvesting to identify businesses and makers engaged with both generic craft organisations/associations and those that are practice/material based. The harvesting process involved first identifying a detailed list of websites providing lists of businesses/ professional practitioners and then running the various websites through harvesting software to draw out information on business activity, location and contact details.

Step 2 utilised TBR's unique business dataset Trends Central Resource (TCR)[38], a longitudinal dataset of 2.5 million businesses operating across the UK. Each record on TCR contains a textual description of business activity. As such, the process involved using a series of keywords developed from the paper definition in order to identify relevant firms amongst the 2.5 million records.

There are a number of limitations of these steps, which require input from other strands of the method in order to estimate the size of the population:

- For some activities, even though businesses can be identified, in some cases there is limited information about exactly what it does, which means there can be a level of uncertainty regarding the extent to which it is actually engaged in Heritage Craft activity. For example, a business operating in the Plaster group might simply describe its activity as "plastering services", which provides no information as to whether or not the services are relevant.
- A further complexity is that the definition excludes businesses/practitioners who only produce "conceptually driven art". Where people are making specific objects, it is virtually impossible to understand whether this is the case from the business listings.
- This exercise will always have a missing tier: it will not capture businesses that are not registered with a guild, do not have a web presence or are not on TCR.

For these reasons, there is a need to a) speak to businesses (or a representative sample of them) in order to validate whether or not they are engaged in Heritage Craft activity, and b) estimate the size of the missing tier in order to create a valid population estimate.

38 For more information see http://www.tbr.co.uk/pages/tbr-observatory/tcr-database.php

Wheelwrights
Photography by Robin Wood/Heritage Crafts Association

8.1.3 Validating the population estimate

Whilst steps 1 and 2 develop a more detailed database of potential Heritage Craft businesses than previously available, it is not a census of all businesses operating across the sector. It is effectively a sample of the Heritage Craft sector, and the function of steps 3 and 4 (arguably the most important in the methodology) is to use this sample in order to estimate the actual size of the sector.

Step 3 uses the principles of an approach developed by TBR and applied to its own dataset (TCR) to estimate the size of the missing tier. This is described in the box below.

TBR's approach to estimating the missing tier

Managed and developed by TBR's in-house data and statistics team (the TBR Observatory), TCR is one of the most extensive bodies of information on UK enterprise. It contains data on 2.5 million live firms in the UK and their performance histories, meaning it can be used to understand the structure and dynamics of any part of the UK economy – any location (down to specific streets), any sector (down to specific products and services) and any size (from micro to conglomerate).

Whilst TCR has superior coverage when compared to official sources such as the Inter-Departmental Business Register (IDBR)[39], it is not a census of all businesses operating across the UK. As such, the Observatory team carries out a "gap-filling" exercise on TCR in order to produce a view of the whole economy.

The only statistics available that attempt to cover the whole of the economy (and can therefore be used to understand the gap) are the Small and Medium Enterprise (SME) statistics produced by the Department for Business, Innovation & Skills (BIS).[40] These statistics are only available at the level of two-digit SIC code and for Government Office Regions, and as such cannot be used for detailed sectoral analysis.

TCR represents a "near census" of UK business activity for those businesses employing five or more people. However, there is a "missing tier" of businesses: the zero class and micro (or non-VAT) enterprises[41]. This gap is to be expected. Many very small businesses do not appear regularly on private sector monitoring databases as a) they often have low turnover and therefore are not required to register for VAT[42] and b) they are not required to submit full accounts to Companies House.[43] This requirement to understand this missing tier drives the need to estimate.

In order to deliver the estimation, all firms on TCR are allocated an employment size band, which allows figures to be weighted to the SME statistics through a grossing procedure. To produce the estimate for the missing tier, given the near census nature of TCR, it is assumed that records which do not have an employment figure generally fall into the zero class category.

The businesses with missing employment data that are placed in this zero class category are assigned an estimate of employment based on their legal status. If a business is registered as a partnership, limited partnership or limited liability partnership, it is generally given an employment figure of 2. For other legal statuses, businesses are given an employment figure of 1.

This procedure allows the comparison of TCR against the SME statistics for each two-digit SIC code across all size bands and then determines the relationship between the business counts of each dataset. This relationship is calculated as a grossing factor, which is then used to weight the businesses on the TCR dataset that are in a particular SIC or size band so that TCR is more like the SME statistics and more representative of the whole economy.

For example, if TCR had one business in a certain SIC and size band, but BIS SME statistics showed five businesses in the same SIC and size band, then the grossing factor would be five (i.e. five divided by one) because the TCR number should be five times higher. Given the "near census" flag, it is only the smaller companies on the TCR dataset that are weighted, namely the zero class (or non-VAT enterprises). Once this process has been completed, the TCR dataset is then ready to carry out analysis across all industries and geographies.

TCR contains site employment both for branches and HQs. Therefore large multisite firms have their employment distributed appropriately, with only HQ site employment being recorded at the HQ location (rather than total company employment). This removes the potential for any double counting.

39 The IDBR only covers VAT and PAYE registered businesses, which means that a significant proportion of sole traders and micro businesses are not covered within these statistics.
40 http://stats.bis.gov.uk/ed/sme/
41 These non-VAT enterprises are generally self-employed sole traders or partnerships but can also be self-employed people operating under a limited company legal status.
42 http://www.hmrc.gov.uk/vat/start/register/when-to-register.htm
43 http://www.businesslink.gov.uk/bdotg/action/detail?itemId=1073791254&type=RESOURCES

For this research, the master database is used as the sample and the grossing factors are applied to that in order to estimate the size of the total population. However, because the database includes businesses that may not be Heritage Craft, this is an estimate of the potential size of the sector. Step 4 is required to validate the sample and subsequently produce the final population estimate.

In order to deliver step 4, a two-stage telephone survey was undertaken with a representative sample of the potential population. The two stages were as follows:

1 A series of questions to validate Heritage Craft activity/relevance to the study.
2 For those businesses engaged in Heritage Crafts, a series of questions about the nature of business activities, employees, markets and revenue, education and training provided/undertaken, and the future prospects of the business.

The outcomes of stage one of the survey were used to moderate the population estimate. Proportions for exclusion were calculated by employment size, group and subgroup, and applied to the original potential population estimate.

In total, 2,478 businesses participated in the survey, with 762 participating in both stages one and two. A copy of the survey is available as an annexe to this report.

8.1.3.1 Stage one validation tests

In order to validate whether a business should or should not be included, the first stage of the survey included a series of questions that would identify non-Heritage Craft businesses and use this information to moderate the estimates of sector size. The validation tests applied were as follows:

The respondent must:

- Make money from their craft
- Use hand tools and/or execute skilled, part-automated processes
- Create items that are functional, traditional in design and/or decorative – but are not conceptually driven art.[44]

This created a problem in some areas where businesses might fulfil these criteria, but still not be truly considered to be Heritage Craft. This was mainly the case in the crafts that are construction trades, such as carpentry and joinery, plastering, painting, glazing etc. One argument is that however these skills are applied, the crafts are fundamentally Heritage. However, because of the variability in the application of skill, it was decided for the purpose of this research that it was important to verify the intent of these businesses with regard to Heritage Craft activity, i.e. is some or all of the business activity specifically Heritage in its intent or application? For this reason, all construction-related categories were first screened to determine the business intent.

44 The respondent may combine conceptual art with one of the other three activities, but it must not be their sole activity.

The final aspect of stage one was to ask all respondents who declined to participate if, before closing the call, they would be willing to confirm whether they would consider their business to be part of the Heritage Craft sector according to the definition statement.

Naturally there are always some respondents who refuse to provide information of any kind. However, the detailed nature of stage one of the survey, plus the structuring of the sample[45] meant that it was not necessary to adjust for non-response bias.

The call outcomes summary for the survey is as follows:

Table 38: Call outcomes summary

Call outcomes	Number of businesses
Attempted calls	9,984
No outcome[46]	5,566
Refused to provide any information	1,940
Participated in stage one	2,478
Participated in stage two	762

(TBR Ref: W13/S1)

The following table provides details on the number and source of business records involved in the process of determining the final population estimate and the final number of firms in the footprint.

Table 39: Business records used in determining population record and source

Group	Firms on TCR	Firms on TCR + web harvest	Firms after de-duplicating and weighting	Firms after applying exclusions rules developed from survey
Animal	1,193	1,600	2,495	1,030
Clay	2,252	3,187	9,711	4,370
Glass	4,309	5,154	16,127	4,570
Guns	393	393	1,489	660
Instruments	994	1,429	3,302	2,130
Jewellery	195	195	497	120
Metal	5,468	7,417	16,437	7,140
Paint	12,410	13,370	70,520	21,460
Paper	2,014	2,123	6,770	1,670
Plaster	4,686	4,830	22,952	11,460
Precious metals	526	1,204	1,433	1,010
Stone	1,543	1,968	5,868	2,490
Textiles	7,769	8,381	21,289	7,970
Toys & automata	487	496	853	100
Vehicles	475	481	1,041	900
Wood & plant	9,190	9,843	25,966	16,400
Total	**53,904**	**62,071**	**206,750**	**83,480**

Source: TCR 2012 and multi-source web-harvest data (TBR Ref: W12/S1)

45 The survey sample was structured by size and activity, and weighting was carried out on this basis. Quotas were set and monitored to ensure confidence that the results sufficiently reflected the population.
46 These are calls which did not deliver any information of use to the survey. This might be for a number of reasons. For example, answering machines, person not present for call back, wrong numbers, busy lines or unanswered lines.

8.1.4 Modelling demographic and value added data

In designing the questionnaire to be used at step 4, the decision was taken not to include questions on the demographic characteristics of employees. Whilst sole traders would have been able to answer these questions accurately, such information gathered from employers can be unreliable and based on guesswork. In addition, respondents often decline to provide such information.

There was also concern that, as it would be challenging to collect relatively straightforward data on turnover through the survey, the string of financial information required to calculate GVA would be provided by so few respondents that the return of information would not justify the cost of collecting it. As such, an alternative method was used to model data.

Step 5 is therefore based on the methodology employed in developing Creative & Cultural Skills' footprint statistics and uses best-fit SICs to understand trends in employment demographics and GVA, and to model data obtained through the survey.

8.1.4.1 Workforce demographics

This approach uses trend data from the Annual Population Survey in order to disaggregate the workforce according to a range of demographic variables:

- Gender
- Age
- Ethnicity
- Disability
- Qualification levels
- Occupational group

Trends are determined using breakdowns of the workforce profile for each variable by the SICs that are the closest match to the groups. These trends are then applied to final population figures in order to estimate the demographic profile of the workforce.

A list of the best first SICs used in this process is available in the appendix (chapter 8.5, page 134).

8.1.4.2 GVA

In order to provide an estimate of the GVA produced by the sector, data is used from the Annual Business Survey (ABS) that describes the relationship between turnover and GVA by SIC.

Turnover is a key element of the GVA calculation; as such, a ratio between levels of turnover and GVA can be determined. The ABS provides a detailed breakdown of the GVA to turnover ratios for all SICs. Using this data and the best-fit SICs for each group, it is possible to take proxies for each group and calculate for every pound sterling of turnover the pounds sterling that are delivered in GVA. This ratio can then be applied to the turnover data generated from the survey.

It is important to note that in both of these approaches, the figures quoted are not drawn from the APS or ABS; rather the trends from this data are used to model the data gained through the survey.

The same list of best-fit SICs was used for the GVA calculation as for the workforce demographics. The list is available in the appendix (Chapter 8.5, page 134).

8.1.5 Modelling employment forecasts

Step 6 again calls on TCR, this time using historical data on employment change in Heritage Craft businesses between 1999 and 2009 in order to forecast employment patterns going forward. The database developed and validated in steps 3 and 4 was matched to TCR in order to deliver the backward employment trend. The backward trend was then used to develop a projection of employment, which was moderated according to the growth expectations forecast by the Office for Budget Responsibility.

8.1.6 Qualitative consultation

Recognising that numbers alone often only tell half a story, the research incorporated a series of 22 in-depth semi-structured interviews with Heritage Craft businesses. These interviews were conducted in sets in order to deliver in-depth information to support the quantitative analysis, to illustrate the reality of the sector's ecology and business, and to consider perceptions of its present and anticipated future prosperity.

Responses to the survey questions provided a basis for the selection of the case studies:

- Stone, which predicted the highest increase in employment.
- Instruments, which predicted the second highest decrease in employment.
- Guns, which has the highest craft GVA per head and predicted an increase in employment.
- Wood & plant – one of the largest groups, which predicted a decrease in employment.

Interviewees were selected according to an urban/rural split. This had the advantage of allowing us to explore how things work in different locations.

- Stone – drawn from across England, but not from the South East or South West.
- Instruments – drawn from across England, but not from the South East or South West.
- Guns – drawn from across England, but not from the South East or South West.
- Wood & plant – urban interviews from the South East region and rural interviews from the South West.

The interviews were intended to extend our understanding of businesses' perceptions of drivers, their markets, and how they approach planning and resources – in particular their supply chains, skills, access to finance and business development support, networks and technology.

The topic guide for the interviews is provided in the appendix (Chapter 8.4).

In the next stage of research, in order to further explore issues related to supply chains and markets, a further 16 interviews will be undertaken with suppliers, exhibitors, retailers and stakeholders, drawn from contacts provided by the business/practitioner interviewees.

8.1.7 Mapping training supply from guilds

In order to gain an understanding of the training provision offered by or through Heritage Craft guilds, a content analysis of their websites was undertaken. The content analysis considers the different types of training and education offered via the website and the level of engagement the guilds have with training delivery.

The content analysis was split into two main stages. First, from the previously established list of Heritage Craft websites (used to create the master database, see chapter 8.1.2), a sub-list was composed of those guild websites that contained some information on training or education related to their craft. For example, if a guild's website contained information about apprenticeships, this would be included in the sub-list.

Secondly, the websites on the sub-list were then revisited and examined to retrieve information about the specific type of training being provided (or advertised) through their websites. An overview of the results of this research is provided in the main body of the report and a detailed summary of findings at group level is provided in the appendix.

8.1.8 Mapping apprenticeships

To develop an understanding of the supply of formal apprenticeships within the sector, data was harvested from the National Apprenticeship Service website, using the apprenticeship search engine to return Heritage Craft apprenticeships that are currently advertised as vacant. To harvest the website, keywords were used to return relevant apprenticeships. The apprenticeships harvested from the National Apprenticeship Service website were then segmented into their relevant groups (e.g. Metal, Wood & plant) to enable a snapshot analysis of apprenticeships currently available.

A similar validation test was used in the search for apprenticeships as that used in the survey – specifically, the level of hand skill. For example, textile apprenticeships where the training was primarily machine based were not included in the analysis.

Further data from the National Apprenticeship Service on the number of people starting and achieving apprenticeships over the last ten years was obtained from the data.gov.uk website.

8.2 Detail on practices and techniques used by group

Group	Practices/techniques noted by survey respondents
Work mainly with leather	• Popular responses with regard to which practices and techniques craftspeople working with leather used were the cutting of leather and making up of leather goods. • Sewing and stitching, completed either by hand or machine, were also common responses from those working within this sector of Heritage Craft. • Other recurrent responses stated riveting as a practice used within their trade. • Less common answers included the attachment of metal fixtures to leather goods and digital printing.
Work in taxidermy	• The majority of those working within this field employ traditional taxidermy skills and techniques. It should, however, be noted that there were a few responses which cite the use of modern materials for model making and various other practices. This included the casting of fibreglass and the use of silicon and rubber. • Besides the actual practice of preserving specimens, a number of those within this craft have diversified their business to incorporate the production of display cases and mounts for their goods.
Work mainly with clay	• A common practice amongst those working predominantly with clay was sculpting. • Walling was also a very common technique used amongst those involved in this Heritage Craft, along with moulding solid objects, decorating, firing and throwing. • Other associated practices included welding, woodworking and steel fabrication. • Respondents also listed the extraction and processing of clay for use. • There was a lack of continuity between those using hand- or combined machine-based techniques according to whether their craft involves restoring, repairing, making or reproducing.
Work mainly with glass	• Cutting, polishing, etching and drilling were commonly noted. • Glassblowing was less common, along with glass engraving and furnace working. • Glass restoration, stained glass working and glass painting were all relatively common. • Whilst often using modern tools, techniques were still hand based rather than computer controlled and, as such, demand a high level of dexterity. • It is interesting to note that glassworking is often not an isolated practice; rather, it is often done in conjunction with other crafts such as carpentry and joinery.
Make, repair, restore, conserve guns	• Most respondents were engaged in gunmaking, with some repair, restoration and conservation. • Whilst respondents highlighted alternative practices and methods such as woodworking, metalworking and engraving (all of which fundamentally contribute to the production and assembly of guns), they are identified as individual practices. • Techniques such as carving, filling, sanding, pinning and boxing are also mentioned. • From the responses provided, it appears as though both hand and machine tools are used across the piece.

Group	Practices/techniques noted by survey respondents
Make, repair, restore, conserve musical instruments	• The majority of craftspeople in this group are involved in the repairing and maintaining of instruments. • Woodworking and carving were common practices. • Tuning instruments and working with string instruments was also regularly noted.
Make, repair, restore, conserve instruments, e.g. clocks & barometers	• A significant number of those within this group are involved in clock restoration. • There is little difference apparent between techniques used by those involved in repairing and maintaining and those restoring instruments. Practices such as carving, woodturning and cleaning are used by both. • A combination of hand tools and machines are used to conduct the trade. However, whilst most use traditional techniques regardless of tool type, a few have now incorporated new methods into their work, e.g. using ultrasonic cleaning tanks.
Make, repair, restore, conserve jewellery	• There is a high degree of crossover between the practices noted in Jewellery and Precious metals. • Goldsmithing and silversmithing are practised by the majority of this group. • Restoration of jewellery, bead threading and bead making are also practised. • Other techniques include sawing, soldering, milling and polishing, all of which contribute to the manufacturing of the final product. • Enamelling is also quite a common technique amongst those making and reproducing things.
Work mainly with metal	• The most common technique employed in this category is blacksmithing. • No respondents cited using the following techniques: etching metal, tinsmithing, coppersmithing and engraving. Therefore, despite a diverse number of techniques that could be utilised by those working in metal, there is a far smaller range actually in use. • It appears as though more craftspeople involved in restoring practices use hand tools and techniques as opposed to those making and reproducing products.
Work with paint	• Practices such as marbling, leafing in gold and silver and wallpapering were commonly noted. • A moderate proportion of this Heritage Craft sector is also involved in gilding. • Work is conducted using a variety of materials including wood and glassware. • Restorative work commands only a small proportion of activity within the group.
Work mainly with paper	• The practices most commonly used are illumination, papermaking and paper shaping. • Calligraphy and lithographic printing are also used by craftspeople within this group.
Work with plaster	• A small number of craftspeople use the practice of lime mortaring to complete their work. Respondents highlight the fact that it is not a principle technique – rather, it is employed only when specifically requested by the client. • Other practices and techniques used include tiling, manufacturing plaster, making moulds used for plaster, and rendering.

Group	Practices/techniques noted by survey respondents
Work mainly with precious metals	• Silversmithing and goldsmithing are by far the most popular practices and techniques within this group. • A moderate number of craftspeople answered that they use other techniques besides those listed. These include French polishing, casting of bronze sculptures and producing trophies. • Gold finishing and gilding are less frequently used. • There is some overlap between craftspeople included in the Precious metals category and other groups, e.g. Jewellery. • Work with precious metals is occasionally done in conjunction with the use of other, less valuable materials, e.g. wax.
Work mainly with stone	• Bricklaying, roofing, stonemasonry, letter cutting and carving stone are utilised across the group, with bricklaying being the most common. • There is no real continuity between those using hand tools or machines depending on whether making, producing, conserving or restoring.
Work mainly with textiles	• Upholstery and other manipulated thread works, e.g. sewing. • Glove making, hand knitting, spinning and dyeing are all practised, though to a lesser extent.
Make, repair, restore, conserve toys, games and/or automata	• The majority of craftspeople working within this group are involved in woodworking and metal working, both of which are relatively equal in terms of the number of people practising such skills. • There is a particularly low proportion of people working with textiles and assembling ready-made parts. • A small number of people noted painting and decorating. • Unlike most other Heritage Crafts, this group also uses electronics. • A large number of craftspeople are still constructing and producing their goods by hand. • All respondents are involved in making or reproducing toys, games and automata as opposed to restoration.
Make, repair, restore, conserve boats	• Craftspeople within this sector appear to specialise either in the manufacture or repair of one or two components of boats. • Mechanical engineering skills were widely used amongst those involved in restoring and manufacturing/reproducing boats. • Woodworking skills are heavily utilised by those involved in boat building. • Metalworking and painting are also used, though less frequently.
Make, repair, restore, conserve cars	• Panel beating and painting are commonly used by this group. • Those craftspeople involved in restoring cars all tend to use similar skills, e.g. panel beating, hammering, metalwork, whereas there is greater contrast in techniques used amongst those making or producing goods.
Work mainly with wood & plant materials	• The most commonly used practice in this group is carpentry, which is used significantly more than all other practices and techniques in this group. • Others include caning, thatching, woodturning, marquetry and lacquering. • A small number of respondents within this Heritage Craft are reliant on “other skills”, e.g. drawing, which is preliminary to the manufacturing of a large number of goods in this group. • A large proportion of work is completed by hand using traditional methods. However, modern technology, e.g. CNC milling, is also used in some subgroups to prepare materials for assembly.

8.3 Learning opportunities provided by guilds and associations by group

Group	Overview	Nature of provision
Animal	• There are two main associations of saddlers: the Society of Master Saddlers and The Worshipful Company of Saddlers. • Associations offered a variety of training opportunities, with the Society of Master Saddlers providing a more progressive pathway of training that culminates in the award of formal qualifications. • Apprenticeships and scholarships are available for those wishing to enter into the profession, combining study with employment and periodic assessments. • Whilst there is no specific age of recipients for the Society of Master Saddlers, preference is given to young saddlers by The Worshipful Company of Saddlers to support their progression. • The British Footwear Association has developed a foundation course in footwear technology for those entering the footwear trade. • Online taxidermy tuition is available to members of the UK Guild of Taxidermists; there is an additional annual seminar and conference.	• Formal apprenticeships are provided by the guilds for saddlers. There is also the opportunity for modest funding from the guild for these apprenticeships. • There is financial support for companies that employ people within that group type to help with training. However, the type of training is not specified. • In addition, there is a formal training scheme for saddlery that offers various levels (from beginner to advanced) to develop skills. • In terms of the provision of training and educating saddlers, the guilds are active in formal training schemes that cover different levels of expertise, from beginner to advanced. • The guilds are also used as a mediator to connect those wanting to be trained with those providing the training. For example, the Society of Master Saddlers provides the contact details of members offering apprenticeships. They also act as governing body for the apprenticeship to judge whether the apprenticeships are being delivered correctly and whether the candidates are meeting the expected standards. • There are potential funding opportunities for candidates provided by the guilds for training related to the supply of associated Heritage Craft skills and training. • The guilds also provide regular short courses (1-4 days) that enable members to participate in modules to inform them of relevant contemporary issues in their trade. These modules cover topics such as health and safety issues and understanding the supply chain. • Some of the short-term courses are restricted to one particular geographical location by the guilds. The result is that some members might find it more difficult to attend these courses and modules that can inform them about important issues. • The guilds make little use of online training and education, which could be a potential means to overcome/mediate the geographical fixity of some courses. • The provision of apprenticeships is widespread throughout England and dependent on the number of employers in the craft trade willing to provide these apprenticeships.

Group	Overview	Nature of provision
Clay	• There are a number of guilds, societies and associations, not confined to merely one central body, i.e. represented in regions and counties. • A large number of organisations host exhibitions rather than workshops and "hands-on" training activities. • A few websites have sections for advertising courses and workshops but have none listed at present, suggesting that training is not always available. • Classes and workshops offered are for hobbyists rather than for professional development, with none of those advertised resulting in a formal qualification being awarded.	• The provision of training and education provided by the guilds associated with the Clay group are predominantly short-term courses (1 to 4 days). • The short term courses are mainly entry-level courses and are given by members of the guilds for a small fee (£20 to £150). • The method applied in the short term courses is usually experienced members providing a demonstration and the participants attempting to copy them. • Talks and presentations are also a popular educational activity in the Clay group. These provide the opportunity for more informal and less structured learning of the craft. • Exhibitions are also common. • The supply of training in the Clay group is relatively strong for short-term courses aimed at entry level. • The guilds offer many opportunities to those wanting to learn the craft at entry level. Interested parties should be able to find a short course nearby. • The guilds lack the provision of longer-term educational training that would enable members to learn the craft as a profession. • There is an absence of the guilds providing apprenticeships in the craft. • There are no qualifications in the crafts awarded by the guilds. • The short-term courses are geographically dispersed throughout England and (potentially) reflect the popularity of pottery as a hobby.

Group	Overview	Nature of provision
Generic	• Courses/workshops are available, covering a whole spectrum of Heritage Crafts, which generally seem to be short term and evening based, with the additional option of private tuition. • Courses do not seem to result in a qualification; they are just for pleasure. • Some guilds provide practical demonstrations where artists take students through the experience of producing their craft objects. • Some websites have sections for the listing of training courses, but at present do not have any available to attend. • Exhibitions are commonplace but it is questionable as to whether this constitutes education/training. • Financial grant support is available for some Heritage Craft apprentices or trainees. • Workshops that have business development training sessions are available. • Some of the guilds take Heritage Craft education to the schools. Artists of the guilds visit schools and work with the pupils to create craft objects. This is an opportunity to disseminate Heritage Craft skills to young people and stimulate their interest. At present, this is not extensively done by guilds. For example, Suffolk Craft Society is one of the few guilds that offer this training activity. • Few guilds offer qualifications that are connected with long (1+years) part-time courses.	• Shows and exhibitions, which are common, provide the opportunity for informally networked learning that is less structured and is developed through encountering and exchanging workers within the Heritage Craft sector. • Education from the guilds, to a certain extent, is dependent upon a volunteer ethic where members give up spare time to run one-off or short-term courses or lectures. • Members of guilds that run courses and classes sometimes charge for their services. • The generic guilds are strong in supplying entry-level educational experiences for Heritage Craft skills. Overall, these courses are based on an informal structure with little emphasis on providing qualifications for participants. • There are relatively few instances of web-based learning for developing Heritage Craft skills. • There is the provision of funding, mentoring, "professional development" to support craft makers in their business and practice, as well as internships. There is some business development support from generic craft guilds, but these are relatively few in comparison to the predominance of informal types of learning. Training is also more aimed at short-term courses/workshops.
Glass	• In terms of information relating to education and training provided on surveyed websites, a significant number of courses seem to culminate in formal qualifications at educational institutions, e.g. National Diploma, Higher National Diploma, BTEC, BA and MA. • Long listings of short-term courses and private tuition for individuals and groups (just for hobbyists).	• Short-term courses are the mainstay of the education and training provided by the guilds in the Glass group. • Classes are aimed at the entry and intermediate levels to learn and develop the craft. • The main technique of training in the Glass group is done by demonstrating and experiencing (e.g. learning from an expert and attempting to copy their skills).

Group	Overview	Nature of provision
Guns	• There is only one principle organisation for gunsmiths. A search revealed plenty of active gunsmith branches but no other governing bodies/guilds. • The aim is to maintain a high level of craftsmanship through mentoring provided by members of the Livery – resulting in admission to the society and earning trainees the Freedom of the Gunmakers' Company (not an official qualification). • There were no details of official course dates or event information. • The organisation provides small grants for the education and training of gunmakers.	• The guild offers an apprenticeship scheme, with the potential for funding, which aims to improve the skills of the craft. • The guild also provides a limited amount of funds for supporting the training of persons already employed within the craft. • The apprenticeship is business oriented and recognises that the skills required to be a professional gunmaker need to preserve the traditional skills and inform the trainee of the modern-day techniques necessary to make the craft products competitive in the marketplace. • The supply of training is aimed at producing professionals in the craft or increasing/developing the skills of those persons already in the craft. • There is nothing provided at entry level for this craft. This could cause a potential barrier for capturing persons that are interested in the craft but unable to commit to a long-term course initially (e.g. an apprenticeship). • No information about the geographical location of the courses was provided by the guild.
Instruments	• Making and restoring clocks and barometers. All but one organisation surveyed offered some form of educational programme, either in the form of a lecture series or structured training. • Courses may lead to an official examination prior to the awarding of a certificate and qualification. Various levels of award are available, e.g. the British Horological Institute offers training that is examined and leads to the awarding of a certificate. • Making and restoring musical instruments: this seems to have fewer current opportunities for training. Whilst web pages have sections for education and courses, no ongoing or upcoming events were listed.	• Seminars and workshops are predominantly the training supplied from the guilds in the Instruments group. • The seminars and workshops are practical, with demonstrations from experts in the craft. • Lectures are also on offer from the guilds, with an emphasis on learning the knowledge and history of the craft (i.e. knowledge-based rather than practical-based training). • The guilds also provide some bursaries for participants for longer-term courses at university. • The guilds are mediators (i.e. they provide links) for the supply of apprenticeships and link the demand with the supply. • The short-term seminars and workshops supply entry-level training in the craft(s). • There is a lack of training supplied by the guilds that would be classified as "next-step" training for the craft. • The guilds are active as mediators in providing apprenticeship training schemes in the craft.

Group	Overview	Nature of provision
Jewellery[47]	• Lots of jewellery making courses are listed on websites. These are organised and run via external organisations and companies. • The majority of courses do not lead to a formal qualification being awarded following the completion of courses. • However, certain companies listed on the main websites surveyed that offer courses also run a number of one-day sessions which result in certification, e.g. art clay certification.	• Short-term courses are the main supply of education and skills training provided by the jewellery guilds. • Some of the courses are business oriented and aimed at improving the business skills of those in the craft, with a focus on topics such as marketing skills, finance, selling techniques, using social media and building a client database. • Members of guilds offer courses/workshops that are short-term, with a main focus on establishing entry-level skills. • Some workshops offered by the guilds and their members are tailored to the needs and skills of the individuals participating on the course. Therefore, if the individuals want to obtain advanced training, then this is possible. • The guilds offer support for training by providing discounts to courses in jewellery making. • It is recognised that craft skills training also needs to be supplemented with business training for the profession. • Some courses are tailored to the specific requirements of the recipient of the training. • Entry-level courses are relatively widely available. • Courses for more advanced or next-step training are more remote.
Metal	• Lots of training opportunities are available within this group, either in the form of adult evening classes, workshops or lecture series (not leading to qualifications, just for hobby and interest). • Different lengths of courses are available, e.g. a weekend or longer, weekly classes. • There is a list of institutions offering formal qualifications, e.g. in the stained glass window trade, students can complete courses which lead to National Diploma, Higher National Diploma, BTEC, BA and MA. • Both short-term and long-term courses are available. • Scholarships and work placements are also awarded to students within this field.	• The supply of skills training is a mixture of formal education with recognised qualifications, and informal training in the form of introduction classes and workshops. • There are also apprenticeships in the Metal groups. The guilds do not provide the apprenticeships but are important mediators that connect the suppliers with those persons demanding the training. • Metal is one of the few groups where the guilds provide training that covers a range of levels, from entry-level to next-step and advanced training. • There seems to be an absence of online training, which could represent a lack of demand for this type of training.
Paper	• Multiple courses, workshops and exhibitions are available, covering a range of different paper-based activities, e.g. medieval manuscript illumination, Persian biomorphic design. • There are extensive lists of training providers nationwide. • Courses do not seem to lead to formal qualifications. However, there are various different competency levels available, for different durations. • Residential courses are also available (calligraphy) but once again do not lead to formal qualifications.	• Courses do exist, but few offer formal qualifications. These courses cater for new and existing Paper workers. Many courses are provided by existing Paper workers. Signposting also exists via some of the guilds. The guilds within the Paper group offer good provision of informal workshops, courses and exhibitions. • There are few formal relationships with education providers. • Courses are available in the Midlands, Cornwall and East of England, and signposting highlights opportunities across the country.

47 See Precious metals for training activity strongly related to Jewellery.

Group	Overview	Nature of provision
Plaster	• There is a central guild for plasterers. • No courses are mentioned specifically. However, given that bursaries and scholarships are available to contribute to "fees for existing courses where no other support is available", there clearly is educational training available in this trade.	• There is no signposting and no courses are offered by the one central guild for plasterers. A bursary is offered to help people access training abroad, wage subsidy and mentoring.
Precious metals	• Lots of courses are available which offer the chance to achieve a formal qualification in a variety of fields within this subgroup, e.g. jewellers' diploma and business diploma. • Courses are also available which cater for all abilities, either to provide basic knowledge or to build on existing knowledge gained from the undertaking of a previous course. • "Drop-in" classes are on offer for those who have already completed a six-week tuition course. • Details of further education institutions were provided.	• Seminars and workshops provide informal training, whilst diplomas provide a qualification. The diplomas are offered by the National Association of Goldsmiths and are formal qualifications. There are also apprenticeships available, although these are currently under development. • There is more formal training provision available here than in other groups. There are also links to apprenticeships and training providers to help those looking at more formal routes into the Precious metal trade. The training available appears to bridge the gap between informal and short courses to more formal development of people's skills.
Stone	• The Dry Stone Walling Association offers regular educational day events to increase awareness about the trade. • There are a range of methods through which training is delivered, ranging from one- or two-day courses, lasting 3-12 months, to studying combined with apprenticeships delivered by employers. • Courses are offered which build on existing knowledge gained from elementary-level training. The Worshipful Company of Masons works in close alliance with The Building Crafts College and City and Guilds of London Art School – the first of which provides courses for the carpentry trade. • A wide number of bursaries and scholarships are available across the subgroups to those wishing to study a Heritage Craft where a qualification will be awarded, e.g. City & Guilds qualification, NVQ3, etc. in stone carving.	• Workshops, seminars and lectures are the most popular form of provision within Stone craft. Practical work, apprenticeships and certificates are also available. However, these are not as widespread as the informal opportunities that exist. • The workshops and seminars are more likely to be offered as CPD to build the skills of stoneworkers. As a result, progression routes are not as apparent. There is some information, such as City & Guilds, NVQ and apprenticeship information, but this is outweighed by the CPD that is available.

Group	Overview	Nature of provision
Textiles	• Both non-award short courses and qualification-level courses are offered across the different subgroups. • Ongoing development of a syllabus for formal qualifications is to be offered at training centres. The aim will be to maintain the high standard of craftsmanship across the trade (The Worshipful Company of Upholders of the City of London). • Within the weaving subgroup, scholarships and other forms of financial support are available to students wishing to attend specific educational institutions to study approved courses. • Individual tuition is available for upholstery trades. Such training appears to be for hobbyists and personal interest purposes rather than for professional development.	• There is a lot of provision for training in Textiles; this includes taster courses, formal qualifications, informal qualifications and CPD. • As such, there is a clear progression route for those that would like to develop their skills and become involved in the sector. Many of those that operate in the sector also appear to be part of the learning environment and support the progression of others within the industry. This progression also supports those in higher education through funds and bursaries. • Strengths exist in the provision of training across the country and the ability of the guilds to provide signposting.
Toys & automata	• Only one organisation was researched for this subgroup. • There is no particular education/course programme. However, the Bespoked Bristol festival provides an opportunity for bicycle fanatics to socialise with fellow artisans and discuss ideas. • There is an exhibition of various heritage bicycle makers at the cycling event.	• Very little information is available for this subgroup and, as such, it is difficult to provide an overall perspective on the training opportunities available. • From what information is available, it is clear that little training is offered and there is not a lot of information for those wanting to develop their skills.
Vehicles	• Searches of the internet revealed very few vehicle-related organisations. Of those identified, none offered educational activities/courses. • Scholarships are available for young students identified as being gifted in this area of craftsmanship. • Occasional meetings are organised, e.g. rallies, which are often held as part of larger events.	• There is very little information available for this subgroup and, as such, it is difficult to provide an overall perspective on the training opportunities available. • From what information is available, it is clear that little training is offered and there is not a lot of information for those wanting to develop their skills.
Wood & plant	• Some larger organisations that might be expected to offer educational activities did not do so, such as The Worshipful Company of Basketmakers. • By contrast, certain subgroups, such as woodturning and carpenters & joiners, were well represented in terms of education provision; both national and regional bodies provide details of courses and workshops. • Carpentry has its own institution for training, providing formal qualifications via the Building Crafts College. All courses work towards either diplomas, NVQ awards, or are apprenticeship schemes.	• Seminars and workshops are predominantly the type of training supplied by the guilds within the Wood & plant group. But because of the number of guilds, there are also opportunities for online learning and qualifications. • Much of the training provision is practical-based, with demonstrations from experts in the craft. • Seminars and workshops provide entry-level training in the Wood & plant crafts. There is also training available at other levels and bursaries for those wanting to study at more advanced levels.

Mike Turnock
Photography by Robin Wood/Heritage Crafts Association

Interviews with Heritage Craft practitioners focused on their perceptions of business drivers, the market for Heritage Craft and their approaches to planning and resources.

8.4 In-depth interview discussion guides

The discussion guides were designed to probe further into themes covered in the survey to extend our understanding of businesses' perceptions of drivers, their markets, and how they approach planning and resources – in particular their supply chains, skills, access to finance and business development support, networks and technology.

Drivers

The questions below are intended to pursue a number of issues raised in the survey – to flesh out, validate and extend our understanding beyond conclusions that might be drawn from the desk research. It should, for example, provide us with perceptions of whether and how government policies, economic, social, technological, legal, or environmental drivers are expected to impact on jobs/occupations and skills needs.

- What drives your business now and will these drivers be the same or different in the next two to three years? What are your priorities? (PROMPTS: government growth initiatives, regulation, environmental sustainability, historic environment and landscape conservation and management)
- Who is your market, where are they and how do they know about you?
- What would you say are the current and future opportunities and challenges of the market?

Strategy and planning

We're interested in how you think about the future of your business and its sustainability:

- How do you go about planning for your business?
- Given the drivers that we've just discussed, do you anticipate that how you plan for the future is going to be different to how you currently plan? If so, why?
- How does the business meet its financial targets and what role do Heritage Craft skills play in this?
- How do you build a reputation for delivering quality – indeed, how do you define quality? (i.e. do they have BSI kitemarks, is it about the service alongside the product, all about word of mouth, or is it through pricing?)
- What does success look like – now and for the future?
- What are the values that motivate your practice/business? (PROMPTS: financial, cultural, environmental). Which value is most important to you?
- Are you planning to develop the use of digital technologies for your business? If so, how and why? (e.g. digital technology can be important to businesses in various ways: improving communications, marketing, retailing, management, design and production, skills training.)

Supply chain

We're interested in your supply chain partly because of how sourcing materials may contribute to the viability of your work, and partly because of its impact on the environment and local economy.

- Where are your suppliers based? (e.g. local, regional, national and international)
- Do you have current or future concerns about suppliers of materials or equipment for your business? (e.g. cost, lack of availability, competition for materials and the market, quality of materials, environmental considerations, e.g. production of materials, transport, health and safety, etc.

Skills supply

A key aspect of this research is to understand current and future skills and workforce needs and issues around Heritage Crafts:

- What are the likely future challenges and opportunities with respect to your workforce skills, training and development?
- For a one-man business only: Are you planning to train people to succeed you in the business?
- What are your views on the future of your craft?

Access to finance and business development support

It's often difficult for small businesses to access funding or various kinds of support.

- Are you aware of support and services available to you, such as that provided by Business Link, local advice websites (e.g. Norfolk Rural Business Advice Service), or craft/creative industry-specific services (e.g. Crafts Council website, Creative & Cultural Skills business survival toolkit or local creative industries agency)?
- Have you used or are you intending to use these? If so, which, when and why?

Networks (not explored in survey)

We're interested in how businesses can, and do, benefit from contact with others: access to information, shared resources, etc.

Are you involved in any informal networks, formal business or craft guilds, or other networks and organisations locally or nationally that promote and support business and craft development (e.g. local Chambers of Commerce; the Federation of Small Businesses; the Heritage Crafts Association; guilds; cultural and creative industries networks, e.g. Creative North Yorkshire; online networks, e.g. Sustainable Craft Networks, or online networks, such as LinkedIn)?

- What are the benefits to your business of being involved in these?

8.5 'Best-fit' SIC definition

Sector	Sub-Sector	UKSIC07	SIC description
Animal	Equine leather	1511	Tanning and dressing of leather; dressing and dyeing of fur
	Leather clothing and accessories	1520	Manufacture of footwear
	Leather luggage	1512	Manufacture of luggage, handbags and the like, saddlery and harness
	Leather preparation	1511	Tanning and dressing of leather; dressing and dyeing of fur
	Making, restoring and conserving other leather objects	1511	Tanning and dressing of leather; dressing and dyeing of fur
	Taxidermy	3299	Other manufacturing not elsewhere classified (n.e.c.)
Clay	Clay construction, building, restoration and conservation	2331	Manufacture of ceramic tiles and flags
	Making, finishing, restoring and conserving clay objects	2331	Manufacture of ceramic tiles and flags
	Making, finishing, restoring and conserving clay objects	2341	Manufacture of ceramic household and ornamental articles
	Making, finishing, restoring and conserving clay objects	9529	Repair of other personal and household goods
	Tile installation	4339	Other building completion and finishing
	Tile making	2331	Manufacture of ceramic tiles and flags
Glass	Decoration, e.g. engraving, painting	9003	Artistic creation
	Glass construction, building, restoration and conservation	4334	Painting and glazing
	Making, fabrication and restoration of glass objects	2312	Shaping and processing of flat glass
	Making, fabrication and restoration of glass objects	2313	Manufacture of hollow glass
	Making, fabrication and restoration of glass objects	2319	Manufacture and processing of other glass, including technical glassware
	Stained glass	2312	Shaping and processing of flat glass
	Stained glass	2313	Manufacture of hollow glass
Guns	Gunsmithing	2540	Manufacture of weapons and ammunition
	Gunsmithing	3311	Repair of fabricated metal products

Sector	Sub-Sector	UKSIC07	SIC description
Instruments	Making and restoring clocks and barometers	2651	Manufacture of instruments and appliances for measuring, testing and navigation
	Making and restoring clocks and barometers	2652	Manufacture of watches and clocks
	Making and restoring clocks and barometers	9525	Repair of watches, clocks and jewellery
	Making and restoring musical instruments	3220	Manufacture of musical instruments
	Making and restoring musical instruments	3319	Repair of other equipment
	Making and restoring musical instruments	9529	Repair of other personal and household goods
Jewellery	Jewellery making	3213	Manufacture of imitation jewellery and related articles
Metal	Architectural metalwork	2511	Manufacture of metal structures and parts of structures
	Architectural metalwork	2512	Manufacture of doors and windows of metal
	Blacksmiths and forgers	2562	Machining
	Decorative and ornamental metalwork	2451	Casting of iron
	Decorative and ornamental metalwork	2512	Manufacture of doors and windows of metal
	Decorative and ornamental metalwork	2550	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
	Decorative and ornamental metalwork	2572	Manufacture of locks and hinges
	Fabricated metalwork	2591	Manufacture of steel drums and similar containers
	Farrier	162	Support activities for animal production
	Foundry	2550	Forging, pressing, stamping and roll-forming of metal; powder metallurgy
	Hand tools, e.g. knives, cutlery	2571	Manufacture of cutlery
	Hand tools, e.g. knives, cutlery	2573	Manufacture of tools
	Hand tools, e.g. knives, cutlery	3311	Repair of fabricated metal products
	Leadwork	4391	Roofing activities
	Leadwork	4399	Other specialised construction activities n.e.c.
	Metal furniture makers	3101	Manufacture of office and shop furniture
	Metal furniture makers	3109	Manufacture of other furniture
	Wrought iron	2512	Manufacture of doors and windows of metal
	Wrought iron	2812	Manufacture of fluid power equipment
Paint	Decoration	4334	Painting and glazing

Sector	Sub-Sector	UKSIC07	SIC description
Paper	Calligraphy and illumination	9003	Artistic creation
	Papermaking and paper shaping	1712	Manufacture of paper and paperboard
	Papermaking and paper shaping	1724	Manufacture of wallpaper
	Papermaking and paper shaping	1729	Manufacture of other articles of paper and paperboard n.e.c.
	Printing, pressing and bookbinding	1812	Other printing
	Printing, pressing and bookbinding	1813	Pre-press and pre-media services
	Printing, pressing and bookbinding	1814	Binding and related services
Plaster	Plastering	4331	Plastering
Precious metals	Engraving and finishing	1814	Binding and related services
	Engraving and finishing	2561	Treatment and coating of metals
	Engraving and finishing	3109	Manufacture of other furniture
	Engraving and finishing	3212	Manufacture of jewellery and related articles
	Engraving and finishing	9525	Repair of watches, clocks and jewellery
	Goldsmithing and silversmithing	3212	Manufacture of jewellery and related articles
	Goldsmithing and silversmithing	9525	Repair of watches, clocks and jewellery
Stone	Bricklaying	4399	Other specialised construction activities n.e.c.
	Carving and letter cutting	1629	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
	Dry stone walling	4399	Other specialised construction activities n.e.c.
	Stonemasonry	4399	Other specialised construction activities n.e.c.

Sector	Sub-Sector	UKSIC07	SIC description
Textiles	Making, restoring and conserving clothing and accessories	1413	Manufacture of other outerwear
	Making, restoring and conserving clothing and accessories	1414	Manufacture of underwear
	Making, restoring and conserving clothing and accessories	1419	Manufacture of other wearing apparel and accessories
	Making, restoring and conserving clothing and accessories	9529	Repair of other personal and household goods
	Making, restoring and conserving furnishings	1392	Manufacture of made-up textile articles, except apparel
	Making, restoring and conserving other textiles, e.g. felt, sails, nets, ropes	1394	Manufacture of cordage, rope, twine and netting
	Making, restoring and conserving other textiles, e.g. felt, sails, nets, ropes	3319	Repair of other equipment
	Making, restoring and conserving textile products	1399	Manufacture of other textiles n.e.c.
	Spinning, weaving and dyeing	1310	Preparation and spinning of textile fibres
	Spinning, weaving and dyeing	1320	Weaving of textiles
	Spinning, weaving and dyeing	1330	Finishing of textiles
	Tailoring and dressmaking	1413	Manufacture of other outerwear
Toys & automata	Toys & automata	3240	Manufacture of games and toys
Vehicles	Vehicle manufacture and restoration – boat	3011	Building of ships and floating structures
	Vehicle manufacture and restoration – boat	3012	Building of pleasure and sporting boats
	Vehicle manufacture and restoration – boat	3315	Repair and maintenance of ships and boats
	Vehicle manufacture and restoration – cars	3099	Manufacture of other transport equipment n.e.c.
	Vehicle manufacture and restoration – cars	3317	Repair and maintenance of transport equipment n.e.c.

Appendix

Sector	Sub-Sector	UKSIC07	SIC description
Wood & plant	Antique restoration and repair	9529	Repair of other personal and household goods
	Basketry	1629	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
	Basketry	9529	Repair of other personal and household goods
	Brooms and brushes	3291	Manufacture of brooms and brushes
	Carpenters and joiners	1623	Manufacture of other builders' carpentry and joinery
	Carpenters and joiners	4332	Joinery installation
	Carpenters and joiners	4399	Other specialised construction activities n.e.c.
	Furniture and cabinet makers	3101	Manufacture of office and shop furniture
	Furniture and cabinet makers	3109	Manufacture of other furniture
	Furniture and cabinet repair/ restoration	9524	Repair of furniture and home furnishings
	Ladder manufacturer	1629	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
	Making and finishing other wooden objects	1629	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
	Picture framing and restoration	1629	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
	Picture framing and restoration	4778	Other retail sale of new goods in specialised stores
	Sculptors and wood carvers	1629	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials
	Thatching	4391	Roofing activities
	Woodturning	1629	Manufacture of other products of wood; manufacture of articles of cork, straw and plaiting materials

Acknowl-edgments

Acknowledgements

9 Acknowledgements

Creative & Cultural Skills would like to thank everyone who was involved in the research for Mapping Heritage Craft. In particular, we would like to thank our sponsors BIS, and the hard work and dedication of the research steering group. We would also like to thank all of the Heritage Craft practitioners that gave their time to either the research survey or in-depth interviews.

Steering Group

- Robin Wood – Heritage Crafts Association
- Greta Bertram – Heritage Crafts Association
- Emily Cherrington – Assistant Private Secretary to TRH The Prince of Wales and The Duchess of Cornwall
- Jo Reilly – Heritage Lottery Fund
- Lee Bryer – ConstructionSkills
- Joy Russell – English Heritage

We would also like to thank:

- Peter Martin – Lantra
- Jonathan Yewdall – BIS
- Dr James Evans – CFE Research
- Fiona Dodd – TBR
- Anna Morgan – TBR
- Sara Selwood – Pomegranate
- Victoria Pirie – Pomegranate
- Nick How – Qa Research
- Hilary Jennings – Independent Consultant
- Maryanne Murray – Project

This research has been led by Fiona Dodd, Head of Research at TBR, in association with Qa research and POMEGRANATE.

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Published in October 2012

Creative and Cultural Industries Ltd is registered in England as a Charity No. 1105974
and as a limited company by guarantee No. 5122855 at Lafone House, The Leathermarket,
Weston Street, London SE1 3HN.

Design by Project

www.thisisproject.com

London Office
Lafone House
The Leathermarket
Weston Street
London SE1 3HN

T (020) 7015 1800
E info@ccskills.org.uk

Scotland Office
28 Castle Street
Edinburgh
EH2 3HT

T (0131) 226 4642

Wales Office
1 Caspian Point
Pierhead Street
Cardiff
CF10 4DQ

T (02920) 444195

Northern Ireland
77 Malone Road
Belfast
BT9 6AQ

T (02890) 385272

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ISBN 978-0-9564298-8-9