Selling Platforms for Art, Craft and Design in Scotland

A Report

CREATIVE SCOTLAND

ALBA | CHRUTHACHAIL

Equal opportunities

Creative Scotland operates an equal opportunities policy. Our offices have disabled access. Certain publications can be made available in Gaelic, in large print, Braille or audio format

This report is produced in electronic form by Creative Scotland – please consider the environment and do not print unless you really need to. Please note that we use hyperlinks throughout this document (to link to other publications, research or plans) which won't be accessible if the document is printed. Your feedback is important to us. Let us know what you think of this publication by emailing **feedback@creativescotland.com**

Contents

Foreword

The quality and diversity of contemporary art, craft, and design in Scotland is a matter of celebration. The country is home to a wealth of skilled artists and creative practitioners who make, show and sell their work across the world. But, as the pandemic has shown, these self-employed and freelance workers are often financially insecure. Sales provide a vital source of income to artists, makers and designers, and contribute to the economy more widely. Given this, Creative Scotland wishes to gain a better understanding of the landscape for sales in Scotland and the opportunities for artists and creative practitioners to promote their work to collectors and buyers.

The report was commissioned in 2019 and gives an important insight into the experience of people working in the sector in a variety of roles, from the maker to the seller. Further research may be required to explore its findings in more depth and to examine some of the more recent shifts that have occurred, especially in terms of digital reach and distribution. While the report has been updated to acknowledge the impacts of COVID-19 it reflects, primarily, a pre-pandemic world.

This is a discursive rather than a definitive piece of work, and through conversation it has generated a wealth of ideas and suggestions. These will act as important pointers to future actions. The report will be shared and discussed with partners to determine where common ambitions and priorities lie. Working with others, and acting in our role as advocate, development agency, broker and funder, we hope this report will enable us to affect positive change.

We're extremely grateful to everybody who took part in the research, to the advisors who helped us to steer the project, and to Juliet Dean of PACE Projects and Janet Biggar for their insight and expertise.

In 2016 Creative Scotland published the Visual Arts Sector Review, a report that discussed the sector's core strengths, identified future challenges and proposed actions that would enable development into the future. The review highlighted the importance of selling work in the sector, noting that after salaried work, income from sales was the biggest contributor to artists' earnings. The report highlighted the need for Creative Scotland to develop a stronger understanding of the landscape for sales in Scotland so that it could more effectively determine what, if any, interventions were needed to strengthen resilience and create opportunity into the future. Our Creative Industries Strategy was published in the same year, putting emphasis on the growth of sustainable creative businesses and the micro-enterprises that make up the majority of the creative industries sector in Scotland.

These reports helped to frame this research. Looking ahead our next steps will be informed by Creative Scotland's refreshed strategic priorities and objectives as laid out in our Annual Plan for 2021/22.

Amanda Catto,
Head of Visual Arts,
Creative Scotland

1 Introduction

This report has been commissioned by Creative Scotland – the public body that supports the arts, screen and creative industries across all parts of Scotland on behalf of everyone who lives, works or visits here. Creative Scotland's Visual Arts Sector Review identified that sales of work are one of the primary sources of income for visual artists, makers and designers in Scotland. Creative Scotland would therefore like to learn more about the range of opportunities for selling original work and limited editions, the challenges that exist in making sales and the potential for future growth.

The research was undertaken by Pace Projects. An Advisory Group with representatives from the sector has been established to inform and guide the work (see Section 11 for Advisory Group membership).

2 Executive Summary

Project Aim

The research provides an overview of selling platforms for artists, makers and designers, and gives an understanding of the barriers that exist in developing sales and an identification of development needs. This research is intended as a starting point which will lead to future in-depth studies. Creative Scotland understands that any suggested actions for development needs in sales will sit alongside other mechanisms for generating income.

Methodology

The research was conducted in three parts; desk research, one to one interviews and a survey to seek feedback on the initial findings. It should be noted that the primary research was conducted in Spring 2019 well before the global pandemic which has changed the way we live and work. Nevertheless, we believe that the data gathered together in this report is still of value and interest.

An Overview of Selling Platforms

Commercial Galleries

With around 300 commercial galleries selling art, craft and design across Scotland, the range of work, business model, pricing, customer base and quality varies considerably. Most galleries sell to a local or national market with only a few focussing primarily on international markets. Many galleries use several selling platforms in addition to their gallery space such as online and at art fairs.

There has been a significant increase over the past 15 years in the number of craft galleries selling affordable, locally made products. However, the market for unique high-value craft and design is considered very underdeveloped and there are few places to buy such work in Scotland.

Many galleries face financial challenges citing high rent and rates as factors. Despite the country's international reputation for high quality visual artwork, there are some forms of artistic practice where there is little to no market in Scotland and some galleries have to seek markets elsewhere e.g., through international art fairs.

Publicly Funded Galleries and Organisations

Many galleries have a physical retail space as well as an online shop; many view the shop as important for supporting their local arts ecology. Some galleries also sell directly through exhibitions, as well as at pop-up events and sometimes art fairs. As public funding and sponsorship opportunities reduce, generating income through sales is more of a priority. Organisations recognise that building up a viable selling platform requires a strategic long-term commitment with consistency across all selling platforms and a relevant skillset. A strong and active social media profile is critical.

Art, Craft and Design Fairs

The contemporary art fairs in Scotland are mainly for a local market, with a focus on accessible, affordable work from Scottish artists. The market for what some may call critically engaged contemporary art is very underdeveloped in Scotland. Where there is little market in Scotland, many galleries have become more reliant on the international art fair circuit. This is becoming increasingly unsustainable financially and environmentally.

There are around 15 national craft and design fairs in the UK although most of these are in England and Wales. Some arts professionals advocate for the establishment of an international craft and design fair in Scotland which would help to build a market and inspire collecting. Many designers and makers would like to access international markets by exhibiting in international craft and design fairs. These however can be expensive to participate in and require investment over several years to make an impact.

Online Shops and Galleries

Online galleries vary significantly in terms of scale, type of artwork and approach; some are curated whilst others have no selection criteria. The past ten years have seen a rise in the number and scale of online galleries operating globally. The largest, Artsy, was set up in 2010 and has over 600,000 works for sale. In the future, it is envisaged that buying art online will become more normalised and digital techniques will be increasingly sophisticated.

Relatively few artists actively sell their work online. In contrast, for many makers and designers selling online (through their website or on platforms such as etsy, or directly on Instagram) is a key part of their sales approach particularly for batch-produced work which is a growing market. It is recognised by individuals and organisations that it is challenging to build a profile online and to grow a customer base. It takes a lot of resources and time to increase visibility, particularly with increasingly saturated markets.

Exhibiting Societies

There are a number of well-established exhibiting societies in Scotland. These are membership organisations, run by and for artists with the aim of providing exhibiting opportunities for members, a support structure and networking. Some have seen large increases in membership; attracting many younger and emerging artists and those living in rural areas. The societies are keen to be more responsive to their members and are exploring new ways of working. Most of the societies are run primarily on a voluntary basis. Identifying sufficient resources is challenging and currently there is limited scope for growth and development.

Open Studios

The past 15 years have seen a big growth in open studio events across Scotland, in urban and rural areas. One of the largest and most established events is Spring Fling in Dumfries and Galloway. Between 2003 and 2018 Spring Fling attracted over 100,000 visitors, generated £1.9m in sales and brought over £8.5m to the local economy.

Many artist's studio events are developing more effective marketing materials such as digital-friendly maps and apps. There has also been a rise in accompanying programmes such as workshops, demonstrations and talks. The majority of open studio events are organised voluntarily which can be a challenge for artists with competing demands on their time.

Markets, Pop-up Shops and Art Car Boot Sales

Pre-COVID-19, events such as craft fairs and makers markets could be increasingly found across Scotland. This could suggest a growing interest in buying local products. These events are important to the livelihood of many makers and designers; for some it represents a major part of their annual business yield. Having the opportunity to sell in person and being part of a creative community of sellers is seen by many as a vital part of being a maker or designer.

There is a growing market for small-scale produced work such as textiles and jewellery. For one-off higher end craft and design pieces the market is much smaller. Organising pop-up events is very resource heavy and may not be sustainable in the future without some form of additional resource.

Degree Shows

Each of the five main art colleges in Scotland host end of year degree shows open to the public. The students are responsible for pricing and handling any sales so it has been difficult to collect specific data on sales. The degree shows can lead to other exhibiting and sales opportunities such as New Designers in London. Colleges are exploring ways of creating selling opportunities for artists at other times of the year through for example a college shop.

Generally, it is recognised there is a skills and knowledge gap amongst students for selling their work. Some art colleges are proactively addressing this and are developing for example employability programmes.

Suggested Actions

This research highlights the passion and commitment of the arts sector in sustaining and growing a healthy arts ecology of which sales is a key element. We found however significant challenges for artists, makers, designers and arts organisations in building, maintaining and growing sales. The challenges identified in this research, which was undertaken in early 2019, have since widened with the arrival of COVID-19, exacerbating the challenges and adding some new ones.

With the temporary closure of many physical spaces, the shift to selling online has become a priority and indeed a necessity for many individuals and organisations. Many events such as art and design fairs, open studio events and exhibitions have either been cancelled, postponed or re-presented online. Although this research does not extend to present day circumstances, it is very likely that some organisations will have been very adversely affected and some may have ceased trading, and it is evident that many makers, designers and artists are struggling, even more so than before, to make a living as a result of the pandemic.

However, we have also witnessed an impressive collaborative and supportive movement within the arts sector during COVID-19. Individuals and organisations have come together to share skills and knowledge; initiatives such as the Artist's Support Pledge and B!D by Visual Art Scotland have demonstrated how quickly the sector can galvanise to support each other.

Summarised below are suggested actions that have emerged from the research. For more details please see Sections 9 and 10 of this report.

Suggested Actions: Financial

All of our interviewees cited the need for sustained financial support as one of their biggest priorities; the financial precarity of the sector has become more acute in the current pandemic. Galleries are looking for rate relief, rent control and business support, and practitioners and micro businesses are asking for tax breaks. Small bursaries for individual creatives could make a significant difference. Administrative support for pop-up events and markets, open studios events and exhibiting societies' programmes would help to ensure their sustainability and growth. Support for galleries to access international markets is also critical. With COVID-19, an online presence is more important than ever before; financial support to develop online potential would be very useful.

Suggested Actions: Developmental

Strengthening the culture for appreciating and buying contemporary craft and design was recognised as a key priority. Creating opportunities in order to retain talent in Scotland, in urban and rural locations fosters healthy creative communities. Recommendations include supporting craft curators and new writing, developing an international craft and design fair in Scotland and financial incentives for setting up physical retail spaces for craft and design, in particular on the high street.

Another significant developmental need is building a market in Scotland for what might be termed experimental/critically engaged art. With COVID-19 disrupting the ability to reach international markets where this work would be sold, there are opportunities for new models. The concept of the 'hyper local' has become increasingly important. Recommendations include creating an art fair of international significance and more focus on building a stronger culture of patronage in Scotland.

Suggested Actions: Skills

Artists, makers and designers would like more professional development opportunities, training and advice. There are particular gaps in such provision for artists. Developing skills for selling internationally – technical and cultural as well as business – was seen by many as a priority. Since COVID-19, the demand for digital skills has significantly increased.

Suggested Actions: Strategic

Many organisations would like support to develop long-term sales strategies, such as specialist sales support. Supporting wider networking and marketing of selling opportunities across Scotland was also seen as a priority. For organisations to continue to grow and scale up, sustained support over a period of years is important as it takes time to access markets and build a customer base. Individuals and organisations would benefit from research into attitudes and behaviours amongst target audiences and customers to give them greater insights into consumer behaviour.

To conclude, this research identified development needs of varying scale across all eight selling platforms. Since the global pandemic, the conditions for selling have changed substantially with online selling becoming critical across all platforms. Given the limitations in the research in terms of scale, and recent global changes, further in-depth studies are recommended, in particular the impact of COVID-19 on selling platforms.

3 Strategic Context

The project is a joint initiative between the Visual Arts and Creative Industries teams within Creative Scotland. It has been designed to respond to:

- The Creative Scotland Visual Arts Sector Review, published in 2016, which identified that the financial position of many artists in the country is reliant on sales with this being second only to salaried work for income.
- The Creative Industries Strategy, published in 2016 by Creative Scotland, which identifies the need for Creative Scotland to work with others to 'invest together to grow sustainable creative businesses through collaboration and partnership working'.
- The Creative Scotland Arts Strategy published in 2016. It identifies the need to 'establish a strong and up-to-date understanding of the different dynamics, operating contexts and business models that exist across the arts in Scotland with a view to enabling the evolution and sustainability of new ways of working, including through partnerships and collaboration'.
- Creative Scotland understands that any recommendations for development needs in sales will sit alongside other mechanisms for generating income.

Own Art

Creative Scotland also contributes to the delivery of Own Art in Scotland. This scheme, which has been operational in Scotland for over 10 years, is designed to make buying art easier and more affordable, and contributes towards supporting the practices of artists and makers.

4 Project Aim

To undertake a review of the opportunities for selling and the different routes to market (in Scotland, the rest of the UK and internationally) for visual artists, makers, and designers based in Scotland. The research will provide:

- An up to date overview of the many and varied ways in which artists, makers and designers are selling original and limited edition works of art, craft and design.
- An understanding of what could be improved, the barriers that exist in developing sales and an identification of development needs/future opportunities.

5 Methodology

The research was conducted in three parts. The first phase comprised of desk research focusing on the following platforms:

- Commercial galleries selling art, craft and design
- Publicly funded galleries/organisations with a retail and/or online shop selling art, craft and design
- Art, craft and design fairs
- Online stores and galleries
- Exhibiting societies
- Open studios
- Markets, pop-up shops and art car boot sales
- Degree shows

Given the finite brief, not all platforms were able to be covered and neither were we able to go into each area in any great depth. Whilst it is recognised that there are other selling platforms such as auctions, commissioning, crowdfunding campaigns, independent shops and department stores, this study has had to limit the research to the eight platforms outlined in Section 6.

The second part of the research entailed one to one interviews with 22 individuals from a cross section of relevant organisations in the fields of visual art, craft and design with a sales remit as well as makers, artists and designers.

Thirdly, we sent the draft report out with a survey, for feedback to 65 people: those interviewed, the advisory group and a small cross section of individuals and organisations who we thought would be able to offer a relevant and informed response. Although the response rate was too small to be indicative of a sector wide response (only 11 responses), the feedback helped to inform some of the research.

This report represents the results of the findings and gives an overview of the landscape of selling platforms for the Scottish sector considering scale, reach, trends and patterns, barriers and challenges, and development needs/future opportunities.

It should be noted that our findings are primarily sourced from 22 interviews and hence many of the statements are based on a small cross section of individual's views. This is an initial scoping study that will help Creative Scotland to decide where there is a need for targeted support to improve selling opportunities for artists, makers, designers and those selling their work.

6 Selling Platforms

This section gives an overview of the scale, reach, trends and patterns, and barriers and challenges of the following selling eight platforms:

- Commercial galleries
- Publicly funded galleries and organisations
- Art, craft and design fairs
- Online shops and galleries
- Exhibiting societies
- Open studios
- Markets, pop-up shops and art car boot sales
- Degree shows

6.1 Commercial Galleries

There are around 300 commercial galleries selling art, craft and design across Scotland. These galleries vary considerably in terms of business model, scale, customers, ethos, pricing, type and quality of work. Some of these could be classed more as independent shops but identify as a gallery. Most sell to a local or national market with only a few focussing primarily on international markets. The number of commercial galleries currently operating across Scotland indicates there is a market; in Edinburgh alone, over 40 galleries were identified.

The global contemporary visual art world has changed dramatically in the last 20 years, yet this is not necessarily reflected in the level and range of sales in Scotland. Despite the country's international reputation for high quality visual art work, there are some forms of artistic practice where sales have been slow in Scotland and these galleries are becoming increasingly reliant on selling through international art fairs where they consider the markets to be. The recent closure of a number of galleries focussing on international markets indicate some of the challenges galleries face in Scotland. Established galleries welcome the arrival of new galleries as this can lead to a critical mass, a network and a stronger culture.

There has however been a significant increase over the past 15 years in the number of craft galleries selling locally made products. This is likely due to the growth of a more developed tourism industry, with initiatives such as the North Coast 500. With urgent debates around climate change and sustainability, buyers are starting to make more conscious choices. There is a growing interest in local provenance, sustainability, ethics and longevity. Whilst there is a growing market for batch-produced work such as textiles and jewellery, the market for unique pieces of craft and design is considered very underdeveloped in Scotland. Several industry specialists argue there is a paucity of places to see and buy work of international standing in Scotland. Some consider there is a general lack of support for craft and design in Scotland in certain areas such as exhibitions, curatorial development and critical writing.

Commercial galleries are using a number of selling platforms in addition to the gallery space including through their websites and/or at art fairs. Art fairs are an important platform for galleries to increase sales and support new buyers and collectors. However, attending art fairs is expensive and can be challenging for the galleries in terms of visibility and cashflow. This is covered in more detail in 6.3.

Artists are often expected to bear many of the financial costs in selling their work through galleries such as framing and transport costs as well as a portion of the marketing costs such as invitations and preview costs. The gallery is likely to take a commission of any sales realised (the % of commissions vary). Opportunities for a wider range and diversity of artists to present their work in galleries can be limited which can in turn reduce opportunities to sell work in Scotland.

Many artists and galleries seem to have been heavily affected by the economic recession in 2008 and feel that the market has never fully recovered. Mid-career artists in particular have noticed a gradual but steady decline in sales over the years. The uncertainty over Brexit is also a contributing factor.

Barriers and Challenges

- **Financial:**
  - **Business Rates and Rents:** rateable values on commercial properties are calculated mainly on size of premises rather than turnover which can disadvantage many galleries that need space to show work. High city centre rents can be a deterrent.
  - **Online Competition**: galleries are increasingly in competition with online companies whose overheads tend to be lower. Sometimes galleries are undercut by customers who contact artists directly. This has increased since the rise of social media.
  - **Start Up Costs:** Setting up a commercial gallery can carry high costs and risk with little public sector support in terms of start-up grants or business support.
- **Developmental:**
  - **Lack of Skills Development for Artists:** compared to professional development training programmes available to makers, there are far fewer opportunities for visual artists to learn skills such as marketing, web site development, PR.
  - **Lack of Time:** gallerists have cited that they have insufficient time to research new artists as their priority is on selling.
  - **Underdeveloped Market for Unique Pieces of Craft and Design**
  - **Underdeveloped Market in Scotland for some forms of Art Practice**
  - **International Market Development**
  - **Underdeveloped Cultural Patronage:** generally, it was lamented there is not a culture of patronage of the arts in Scotland and no "decent patron scheme in Scotland that works". There is also a sense that the potential for support from Scotland's large diaspora is largely unrealised.
  - **Cultural Assets and Tourism:** it was considered that the tourism market for contemporary art was underexploited and that local authorities could do more to promote the cultural assets in the region. A more joined up approach with other local authorities in terms of marketing would be helpful.

6.2 Publicly Funded Galleries and Organisations

Many publicly funded arts spaces have a physical retail space as well as an online shop which sells locally made products such as jewellery and ceramics. Several commission artists and designers to produce limited edition works and/or create collections of products inspired by their art programme or heritage.

In the case of the two key photography centres in Scotland (Street Level in Glasgow and Stills in Edinburgh), editions and prints relating to the galleries' exhibition programmes are available for sale both in the gallery and online.

The five print studios (in Aberdeen, Dundee, Edinburgh, Glasgow and Inverness) offer a wide range of work for sale both in the gallery shops and online; including work by members and invited artists. Some have established publishing programmes with artists which entails the commissioning of a limited edition of prints. Some of the print studios have also built up a considerable stock of work which presents both a challenge and an opportunity. Publicly funded sculpture studios tend not to have prominent selling platforms.

Many of the galleries use a number of complementary selling platforms such as the gallery shop, exhibition space, online shop, pop-up events and sometimes art fairs. Several organisations saw the shop as important for supporting the arts ecology; providing a platform for artists and makers, particularly in the local area. Generating income through sales has become more of a priority as public funding and sponsorship opportunities reduce. More galleries/arts centres are setting up online stores in addition to their physical shops.

Building up a viable selling platform requires a strategic long-term commitment. Public spaces need to have strong sales strategy, train up staff where necessary and allocate sufficient staff resources to implement the strategy. In organisations with a small team, there is likely to be no dedicated sales person. It is important to acknowledge that the skillset for selling is quite different from exhibition making.

Having consistency across all selling platforms such as messaging and pricing is important, as is a strong and active social media profile. The latter (especially Instagram) was cited as critical particularly when launching new products or announcing special offers. Linking the retail and the communications teams is also seen as vital.

Project Ability's engagement of a creative consultant has been fundamental in growing the store, in developing new products and ensuring continuity of stock. Sales have increased significantly and the organisation sees further potential to increase sales.

Barriers and Challenges

- **Expertise and Staff Resources:** publicly funded arts spaces do not necessarily have the skills, time or resources to sell artwork as a viable business.

6.3 Art, Craft and Design Fairs

In Scotland, there are now five annual art fairs selling contemporary visual art: in Glasgow, Aberdeen, Edinburgh, the Borders (Kelso) and Dundee. The markets are predominantly local with a focus on buying accessible, affordable work from Scottish artists. As well as commercial galleries attending the art fairs, a number of artists take part independently as well as charitable organisations.

In addition to the Scottish art fairs, there are around 12 fairs with a national remit. These are mainly concentrated around London and in the south of England. Some present alternative models such as the New Artist Fair which is open to artists rather than galleries to exhibit, and the Other Art Fair which showcases emerging artists and those without gallery representation. This looks like an appealing model for artists trying to access these markets and make themselves known to galleries as well as individual collectors.

The international art market has experienced staggering growth in the past 20 years and this can be evidenced in the rapid rise in number and scale of international art fairs across the globe in cities such as London, Basel, New York, Miami and Hong Kong. Most notable amongst these are ArtBasel and Frieze Art Fair. The established art fairs are often a catalyst for attracting satellite fairs suited to different markets such as Hybrid Contemporary taking place alongside the long-established ARCO fair. Successful models have expanded into other cities such as the Affordable Art Fair now found in ten cities across the world. Unseen Photo Fair in Amsterdam is one of the major events in the European/International photography calendar. Participation in associated events such as Unseen Book Market are cost effective ways of profiling work without the big expense of taking out a booth in the fair itself.

Growth in the international art market is beginning to tail off and fairs can be vulnerable to market changes. Whilst the larger brands seem to be thriving, several of the smaller fairs have gone out of business or replaced by new ones. Some Scottish galleries are heavily reliant on taking part in art fairs in order to reach their markets. The galleries have emphasised the importance of building up their reputation and profile over time; arguing a sustained presence over several years and at multiple fairs per year is vital. Many emerging galleries find it challenging to break into the markets where they understand the sales are.

One of the most significant changes is how the international art fair has transformed from a trade show into a platform where all aspects of the art market – galleries, collectors, curators, and artists converge. With the rise in number and frequency, the art fairs have become very influential and, in many artists and galleries eyes, too powerful. Although established as commercial fairs, they are increasingly used by curators as one of their primary sources for seeing new work and research for exhibition making.

There are around 15 craft and design fairs of national significance across the UK although the majority of these are to be found in London, Wales and the north of England. Aside from

Scotland Trade Fair which features a specific craft section, the only Scottish fair of national significance identified is Elements: a fair of contemporary jewellery and silver. There does however appear to be a significant expansion in the past five years of local fairs/markets across Scotland, mainly in the big towns and cities. This is covered in more detail in Section 6.7.

In the north of England, the Great Northern Contemporary Craft Fair is recognised as one of the leading selling events for contemporary craft in the UK (150 makers, 6,000 visitors). Established in 2008 in Manchester, it expanded in 2018 to include both Newcastle and Sheffield. The Hepworth Wakefield has a good model of fairs, organising and hosting specialist print and ceramics fairs as well as their summer and Christmas fairs.

In London, a fairly recent addition (2015) is the London Craft Week taking place annually in May. It is an umbrella festival bringing together over 240 established and emerging makers, designers, brands and galleries from around the world in venues across London. MADE London design and craft fair is a regular feature in London – with over 5,500 annual visitors – there are three annual fairs in London as well as one in Brighton. New Designers is a major annual showcasing opportunity in London showing the work of around 3,000 emerging designers and new graduates. With a focus on showcasing and networking it can nevertheless lead to future sales opportunities.

In contrast to the high volume of international art fairs, only three major craft and design fairs of international reach in the UK could be identified: Collect, London Design Fair and 100% Design.

Collect is the only gallery-presented art fair dedicated to modern craft and design. Organised by the Crafts Council, it takes place annually in London (40 international galleries, 400 artists). Craft Scotland presented a showcase of 17 makers in 2018 and presented again in 2019. A big moment in the calendar is the London Design Festival which attracts a number of industry events such as London Design Fair (550 exhibitors, 36 countries); 100% Design (400 exhibitors) and retail trade event Top Drawer (60 countries, 21,000 visitors).

In the USA, NY Now is an important annual trade event in New York which attracts over 20,000 visitors over four days. For some years, the Department of International Trade (DIT) has supported individual makers to attend. In 2019 Craft Scotland started a new partnership with DIT and presented a showcase of 12 Scottish makers which was set to expand to 20 in 2020. Elsewhere there is Premiere Vision in Paris (and in other cities); the largest global fashion and textiles event worldwide which takes place twice a year and has over 2,000 exhibitors. And there is the long established Salon del Mobile Milano now in its 59th year which is probably the largest and most respected design fair in the world.

Barriers and Challenges

- **Financial:**
  - **Cost:** the costs of the stand, transport, accommodation can be significant. With rising shipping and insurance costs, participation in international fairs is particularly high. Galleries have to simultaneously staff the fair booth and their galleries back in Scotland. For individual makers and artists, taking a week off to take part in a fair can result in loss of income in other areas.
  - **Risk:** there are no guarantees that sales targets will be met.
  - **Sustainability:** as well as financially unsustainable, there are significant environmental costs. Creatively, artists exhibiting at multiple art fairs are under pressure to increase their output which can be unsustainable.
- **Access:**
  - The influence and power of the international art fair presents a critical problem for many artists in Scotland who do not have access to these markets. The fairs are where significant sales are made and where many curatorial decisions are taken.
- **Skills:**
  - **Skilling up:** artists, makers and designers need a wide range of skills and knowledge in e.g., branding, pricing, marketing. Craft Scotland identified a gap in skillset within the craft sector and have proactively responded by developing a number of CPD programmes such as the Compass programme for next generation, emerging and established makers.

6.4 Online Shops and Galleries

Increasingly arts organisations are exploring ways of expanding their markets by selling online. Selling print and photography online has advantages over 3D works in terms of reproduction online, packaging and shipping. In Scotland, five online galleries focusing on Scottish art were identified; the similarly named scotlandartists.co.uk, scotlandsartists.com, scotlandart.com, as well as artpistol and From the Studio.

Online galleries vary significantly in terms of scale, type of artwork and approach; some are curated and feature a small number of artists such as From the Studio; others such as artgallery.co.uk are uncurated, selling over 44,000 works with prices starting from £27 for an original artwork.

The past ten years have seen a rise in the number and scale of online galleries operating globally. The largest, Artsy, was set up in 2010 and has over 600,000 works for sale. Artsy partners with over 2,500 galleries, 800 museums and institutions, and 60 international art fairs. Several Scottish galleries are partnering with Artsy including Ingleby Gallery, Patricia Fleming Projects, Peacock Visual Arts and the Scottish Gallery. The French-based company Singulart, established in 2017, has achieved extraordinary growth. It showcases the work of thousands of artists from over 45 countries. They have over 300 UK artists on their books.

Companies are aware of the huge potential for attracting large audiences, far greater than a physical ‘offline’ audience if the conditions are right. Buying art online is however still a new practice and companies are continually exploring ways of growing their customer base. Many companies use algorisms to recognise people’s tastes and preferences to encourage them to buy works. Singulart are looking to expand their service by partnering with other institutions, creating editorial to enrich their site and delivering pop-up shows. Artsy are planning to include video art, performance art and dance on their site.

In the future, it is envisaged that buying art online will become more normalised. Digital techniques will likely be increasingly sophisticated, such as the ability to create more immersive, multisensory environments which will assist customers in making an informed choice. Some customers may feel intimidated going into a gallery and may prefer the anonymity of buying online.

In terms of individuals, relatively few artists with websites actively sell their work online. In contrast, for many makers and designers, selling online (through their website or on platforms such as etsy) is a key part of their sales approach particularly for batch-produced work which is a growing market. Certain products such as jewellery or textiles are more straightforward to sell online than others. Ceramics, glass and bulkier items are expensive to ship and risk getting damaged in transit. Selling ceramics and glass internationally is riskier because it is difficult to get insurance for damages or losses.

It is hard to build a profile online; it takes a lot of resources and time to increase visibility. In some cases, makers start off selling online with platforms such as etsy and once established they shift to embedding their own selling platform such as shopify or paypal into their websites. This gives them more control and retains customers on their websites rather than being redirected to a third-party website. etsy costs have also started to rise.

In terms of social media, Instagram seems most favoured by makers and designers to promote their products and they use this to drive sales to their websites. Many makers and designers also sell directly through Instagram, featuring photos/stories with prices. Potential customers can comment to buy and send payment via paypal. This is often used to clear out older work or make money quickly in the form of a sale replacing an open studio event. This is happening increasingly across art, craft and design and is an interesting instant sales model.

Barriers and Challenges

- **Financial:** although less costly than running a physical gallery, it is nevertheless expensive to develop and maintain a good quality website which needs to be regularly serviced and updated. Some makers with online shops have found the costs of platforms such as shopify too expensive for the level of sales they make.
- **Selling 'unseen':** it is harder to sell unique and/or higher value works online without first seeing the work in person. Perhaps for this reason, some online galleries such as artpistol and ScotlandArt also have physical gallery spaces. As the practice of buying art online is relatively new, customers can be hesitant and may need incentivising or particular encouragement before making a sale. The larger online galleries tend to have online chat advisors.
- **Expertise and Resources:** Visibility and Capacity: there are challenges for online galleries, especially small-scale ones, to understand their markets and drive traffic to their sites. Regular search engine rich content, good photography and active social media are important. Visibility for artists and galleries using expansive platforms such as Artsy or etsy can be a challenge.With increasingly saturated markets, makers need to dedicate more resources and time to make their websites distinctive i.e., investing in good photography.

6.5 Exhibiting Societies

There are a number of well-established exhibiting societies in Scotland; some dating back over almost 200 years. The main societies are the Royal Scottish Academy (RSA), the Society for Scottish Artists (SSA), Visual Arts Scotland (VAS), the Royal Scottish Society of Painters in Watercolour (RSW) and the Scottish Glass Society.

Essentially, the exhibiting societies operate in the same way; they are membership organisations, run by and for artists with the aim of providing exhibiting opportunities for their members, a support structure and networking. In some cases, prospective members need to be nominated by existing members as in the case of the RSW and the RSA; in other cases, there are different levels of membership e.g., for students and emerging artists, open membership (with certain criteria) or through invitation.

We could see evidence of more collaborative practice and an increase in partnerships: for example, VAS and SSA joined forces in 2018 to stage a joint annual exhibition at the RSA and collaborated again in 2020 to create, in their words, 'the biggest show of contemporary art in Scotland'. There are advantages in doing so; both organisations are able to pool resources and expertise and they can exhibit over a longer period. There are however disadvantages such as fewer exhibiting opportunities for artists. Craft Scotland has collaborated with VAS for the past three years on a material specific project at the annual VAS exhibition.

The SSA has seen a doubling of its membership; from 500 to 1,000 in the past two and a half years. It has attracted many younger and emerging artists and those living in rural and remote parts of Scotland. Many appreciate the benefits of being part of a community of artists; they are interested in ways of working collectively and collaboratively and feel supported by being part of a society. The SSA is keen to be responsive to their members and is exploring new ways of working and new exhibition opportunities outwith the RSA in Edinburgh and beyond the central belt.

In terms of other patterns, there is a move to produce more strongly curated exhibitions with fewer artists on show. Although this results in fewer exhibiting opportunities for artists, the resultant exhibitions are more coherent. The SSA is starting to show more experimental work, performance-based and new media work; this is appealing to emerging artists and is one of the reasons for the SSA's recent increase in membership numbers. SSA have also started to explore other selling platforms; they participated in the Edinburgh Art Fair at the end of 2018 and did in their words 'surprisingly well'.

VAS is exploring new ways of highlighting the work of their members such as the member showcase: a monthly Q+A on their website of three artist members chosen by a guest curator.

The dates for the annual SSA and VAS exhibitions at the RSA are set by the National Galleries of Scotland and the RSA programme and are not necessarily the best times for selling work i.e., 2 days before Christmas. Furthermore, in 2018, the SSA, VAS and RSA each held their annual exhibitions one after the other between December and March. From a sales and marketing perspective, they would each benefit from staggering the exhibitions throughout the year however they are limited to the dates they have been offered.

For many artists, opportunities to exhibit their work are limited and hence the chance to show at the prestigious RSA in Edinburgh is very attractive. However, exhibitions such as the annual VAS Open are over-subscribed with around 200 artists selected out of 1,200 applications. Societies such as VAS and SSA are responding by creating new ways of working and new partnerships.

Barriers and Challenges

- **Expertise and Resources:**
    - **Capacity:** most of the societies are largely run on a voluntary basis and are reliant on the goodwill and commitment of their organising committees. Key positions such as President and Treasurer tend to be short-term and institutional knowledge can be lost as people move on. As societies look to develop new opportunities for their members, identifying sufficient resources (staff and finances) is challenging and currently there is limited scope for growth and development.
    - **Skills:** as the exhibitions are run voluntarily, there is no dedicated sales staff or capacity for follow-up sales after the exhibition period.
    - **Generating income:** with some societies shifting their curatorial practice to exhibiting fewer works than before and with a greater emphasis on new media and performance work, sales have been considerably lower than previous years. Some societies are interested in developing other income generating opportunities such as taking part in art fairs or selling online however this is challenging with limited resources.

6.6 Open Studios

The past 15 years have seen a large growth in open studio events across Scotland; in cities where there tends to be a larger concentration of artists and in rural and remote locations. In studio complexes such as WASPS (which can be found in Edinburgh, Glasgow, Dundee, Aberdeen, Irvine, Selkirk, Kirkcudbright and Newburgh) many of the artists self-organise open studio events once or twice a year. WASPS is the largest studio provider in Scotland providing studio accommodation to over 800 artists across 21 buildings so there is much scope for open studio events.

In Fife alone, one can find the East Neuk Open Studios, Open Studios North Fife, Artline Open Studios and Central Fife Open Studios. In addition to these, the annual Pittenweem Arts Festival shows the work of over 100 makers in their homes and studios and is a selling platform as well as a platform for exhibitions, talks and workshops. Many of the studio events have a degree of quality control i.e., Open Studios North Fife established in 2006, is only open to professional artists and makers of a high standard who have a permanent studio in the area; selection is made by committee.

In rural areas, where artist's studios tend to be dispersed, artists have come together to organise open studio events in the form of a trail. North East Open Studios established in 2003, is the biggest open studio event in Scotland for artists and makers living and working in the North East of Scotland. During the ten-day event, it promotes seven different artist's trails across the region. As well as a dedicated website, every year it produces a book with maps of the trails which are widely distributed. The event is promoted as part of Aberdeen's festivals, and is also used as a year-round guide to artists' studios.

One of the largest and most established events is Spring Fling which takes place across Dumfries and Galloway and is arranged around six routes across the region. Between 2003 and 2018 Spring Fling attracted over 100,000 visitors who made around 300,000 studio visits. Over this period, £1.9 million of art and craft was bought in studios and the event brought over £8.5 million to the local economy.

In areas where there is a high concentration of creatives, artists have come together to organise exhibitions in their own homes, e.g., the Art Houses in Art Walk Portobello which has become very popular and is expanding every year.

In less populated areas, studios can be open all year round to the public. In the Outer Hebrides, the local authority has produced a handy cultural guide (*Made in the Outer Hebrides*) for the public to access artists and makers. In Orkney, the members-run Creative Orkney has produced the *Creative Orkney Trail* which is a guide to artists/makers' studios and sales outlets. Many studios are open five to six days a week, either seasonally or all year round.

Another area which offers year-round access to artist's studios is Craft Town Scotland in West Kilbride – Scotland's only designated craft town. The local authority sees craft as a driver for economic regeneration. Nine craft studios are open to the public throughout the year and works are also for sale in the Barony Arts Centre shop.

Many artist's groups are developing more effective marketing materials such as digital-friendly maps and apps. In addition to opening studios to the public, there has been a rise in accompanying programmes such as workshops, demonstrations, talks, and events for children. Some open studios initiatives even have bursaries and awards schemes for artists.

Barriers and Challenges

- **Financial:** participation fees can be a barrier for some artists.
- **Quality and Range:** this can vary from year to year. Artists are not always able to take part for personal or professional reasons so the standard and range can vary.
- **Capacity:** the majority of open studio events rely heavily on artists to voluntarily organise and run them. These events can be labour intensive and involve a huge collective effort, e.g., liaising with individual studio holders, processing participation fees, designing and distributing brochures. This can be a challenge for artists as they have competing demands on their time.
- **Access:** many of the studios are in people's homes or refurbished industrial properties and are not necessarily suitable for full public access.

6.7 Markets, Pop-up Shops and Art Car Boot Sales

Selling events can be increasingly found across Scotland from craft fairs in village halls, country fairs on estates, craft markets in towns, to makers markets and design markets in large towns and cities. This growth could suggest an increasing interest in buying locally designed and made products. These selling events are important to the livelihood of many makers and designers; for some it represents a major part of their annual business yield. The quality of products for sale can vary considerably; not all events have a selection criteria or quality control. Many are organised on a voluntary basis or with limited resources which calls in to question their long-term sustainability. There is a growing market for batch-produced work such as textiles (e.g., scarves, gloves), jewellery and ceramics.

For one-off higher end works which span craft, visual arts and design the market is much smaller.

The fairs and markets take place throughout the year, some happen monthly (e.g., the Ministry of Crafts in Aberdeen and Dundee), some are seasonal (e.g., the Christmas Craft Art and Design fairs held in Glasgow and Edinburgh) and some are annual such as the Fruitmarket Gallery Annual Design Market and the WASPS Christmas market. A number of companies have set up in the past five years such as Tea Green, run by makers for makers and the Ministry of Crafts. Orkney Arts and Crafts is a membership organisation that hosts around 20 one-day craft fairs between March and December every year.

Etsy Made Local is a national community-led initiative connecting shoppers with their local etsy communities. These take place across the UK and in Scotland can be found in Glasgow, Edinburgh, Aberdeen and Dundee. In 2018, the Glasgow market attracted over 6,000 visitors over two days. Having the opportunity to sell in person to their public and being part of a creative community of sellers is seen by many as a vital part of being a maker or designer.

Craft Scotland's annual pop-up summer exhibition takes advantage of the high volume of visitors during the Edinburgh Festival and uses the Fringe brochure as one of its key forms of advertising. It is a selling exhibition of makers and designers working in production rather than creating one-off pieces and has proved to be very successful. Annual increases in sales have enabled Craft Scotland to employ dedicated sales staff and organise additional events such as workshops run by makers. The latter have proved very popular and have helped to bring in new audiences and drive sales. In 2017, over 5,300 visitors attended over 24 days. In 2018, there were around 4,250 visitors however the sales were higher than the previous year. Dazzle is another event that takes advantage of the swelling of population during the Edinburgh Festival. It has delivered a selling exhibition of contemporary jewellery in Edinburgh since 1981 – the past eight years have been at the Dovecot. It also has an online shop where a selection of the exhibitors' work is for sale all year round.

An interesting rural model is Exclusively Highlands – an events company based in the Black Isle who have tapped into the tourism market: they use historic settings across the north of Scotland such as Blair Castle and House of Dun as the backdrop for their events where they sell high quality locally made food and craft. The growth in the number and scale of these events would point to an increasing interest in customers wanting experiences/ a 'day out' rather than just a transactional exchange. More and more makers are organising their own events and in a variety of venues such as a pop-up afternoon event in a pub or a takeover of a restaurant. Again, people seem to be looking for an experience (i.e., where it is combined with places to sit and eat and listen to live music). These tend to do better and attract people to stay for longer.

Focusing on functional objects for the everyday, such as tables and chairs, Design Exhibition Scotland, established in 2018, curates an annual showcase of contemporary design with the expressed aim of introducing outstanding design to a wide public audience. It was born out of a lack of exhibiting opportunities in Scotland and although not an overt selling platform, it is paving the way for future customers to buy locally designed high-quality objects.

The majority of pop-up events sell mainly craft and design (or have a small selection of artwork at a relatively low price point). Only one pop-up art market in Scotland of significant scale could be identified: the Art Car Boot Sale run by Patricia Fleming Projects. This is an annual curated event featuring around 100 artists who sell directly to the public. Held at SWG3 in Glasgow the Art Car Boot Sale is growing in size and reputation. Perhaps as a result of its success, other initiatives are beginning to start up; Rhubaba gallery held their first ever art market in Edinburgh in September 2019.

Barriers and Challenges

- **Financial:** Organising events such as Etsy Made Local and the Art Car Boot Sale are very resource heavy. This may not be sustainable in the future without some form of additional resource. Several well-known craft markets in Glasgow have indeed ceased to operate in recent years due to a lack of resources for organising such events.
- **Access:** Buying contemporary craft, design or art frequently relies on already being networked to discover where the events are taking place; this can inadvertently be quite exclusive.

6.8 Degree Shows

There are five main art colleges in Scotland: Duncan of Jordanstone College of Art (DJCA), Edinburgh College of Art (ECA), the Glasgow School of Art (GSA), Gray's School of Art (Grays) and Moray School of Art (MSoA). Each of these host end of year degree shows which are open to the public with preview days for press and VIPs. Although the objective is primarily showcasing and networking, many of the works are also available for sale. The students, rather than the colleges, are responsible for setting their own prices and handling any sales. Many students actively use social media, in particular Instagram, to promote their work. Whether this leads directly to sales is difficult to assess. As a generalisation, the School of Art and the School of Design students have different approaches and attitudes towards selling with some School of Art students reluctant to engage in selling.

Publications are produced to accompany the shows with details on each participating student. Two out of the five art colleges have a dedicated degree show website. This is a useful digital documentation of the event and a resource for prospective buyers, gallerists and curators.

Colleges are exploring ways of creating selling opportunities for artists at other times of the year. The GSA shop was set up in 2008 to sell a range of handmade or locally designed products from students, alumni and staff. It is currently closed due to the fire at the art school. Grays are keen to commission alumni and staff to create Gray's Editions and are also planning to run competitions for students to develop ideas too. These would be for sale during the year and during the degree show. ECA are thinking of developing a shop but plans are embryonic.

As well as the potential to sell work, there are other opportunities arising from the degree shows; a number of awards are given out such as monetary, residency, studio or purchase prizes. The number of graduate exhibitions and exhibiting opportunities drawn directly from the degree shows has risen. The RSA New Contemporaries, started in 2009, is an annual curated show of 60 to 65 fine arts graduates from the five main colleges of art in Scotland and is a further opportunity for artists to sell their work. Every year the RSA also gives out over £25,000 worth of monetary, residency, studio and purchase prizes for emerging artists in Scotland including one single award of £10,000: the Glenfiddich Artist in Residence Award.

Both Visual Arts Scotland and the Scottish Society of Artists select a number of graduates from the five Scottish art colleges to show in their annual exhibitions at the RSA in Edinburgh. Every year the Royal Scottish Society of Painters in Watercolour (RSW) invite Scottish art college graduates working in watercolour to exhibit their work with the RSW. The gallery artpistol has an annual summer exhibition of recent graduates: Best of Scotland's Art School Graduates; this can also lead to artists being signed up to the gallery. Elsewhere, Spring Fling introduced a new scheme in 2019 open to graduates from all the Scottish colleges of art. Every year each of the five colleges of art take a selection of students to New Designers in London – a major platform for graduate designers to connect with industry and consumers; over 3,000 students exhibit each year over a two-week period.

Barriers and Challenges

- **Skills and Resources**
    - **Media and Attitudes:** certain media such as paintings, photography, jewellery, textiles lend themselves more easily to sales than others, for example, performance or installation based practice. Some students particularly amongst Fine Art have a negative attitude towards selling their work.
    - **Skills:** one of the toughest challenges cited by artists is navigating the first few years after art school. Generally, it is recognised that students from both the Schools of Art and the Schools of Design have a skills gap and knowledge gap and are in need of more training to help professionalise their practice. The professional development advice and training available to students can vary considerably from college to college and between departments too. Some art colleges are proactively addressing this and are developing employability programmes for their art and design students.
    - **Resources:** some art colleges lack the financial and human resources to expand their digital offer e.g., a dedicated degree show website
- **Geographical distance:** for art colleges outside the central belt it can be more challenging to attract people to visit the degree shows. Despite incentivising and organising special events, some colleges have found that too often curators, gallerists and collectors from the central belt do not attend.

7 Own Art

Own Art is a national initiative that makes buying contemporary art and craft affordable by providing interest-free loans for the purchase of original work.

The Own Art scheme has undoubtedly been a helpful catalyst for purchasing art. Over 48 galleries in Scotland are currently on the scheme from Dumfries and Galloway up to the Shetland Islands although there is a greater concentration of galleries in the central belt and the north east of Scotland. Between 2013 and 2018, £3,660,034 was processed by Scottish galleries under the Own Art scheme. Assuming galleries take 40% commission on average, in the region of £2,196,020 has been paid out to artists in the last six years. In 2018, 721 loans were processed at a total value of £678,244. Once commission has been discounted, we estimate around 500 artists received in the region of £406,946.

Own Art's customer survey data in Scotland since 2014 indicates that 60% of artwork purchased on the scheme were paintings, 22% prints, 5% sculpture and 3% ceramics. 79% of customers said Own Art enabled their purchase. 74% of customers said Own Art enabled them to purchase a more expensive item than they originally thought possible.

It should also be noted that quite a number of galleries offer their own credit scheme as an alternative to Own Art, mainly for established clients.

8 Customers, Buyers and Collectors

This research did not specifically look into buyers, customers and collectors however here are some findings we gathered along the way.

Public collecting initiatives have been critical in supporting artists and galleries. With many museums having reduced acquisition budgets, sales from public museums have decreased in recent years; however, the role of institutions such as universities and hospital trusts in collecting is still invaluable.

It is widely acknowledged that the culture of patronage is underdeveloped in Scotland which in turn impacts on the ability for public museums and galleries to build their collections. A greater focus on building a stronger culture of patronage would be helpful.

Buyers have multiple reasons for purchasing art e.g., personal, societal or economic. Buying a work of art can be a one-off experience, an intermittent or ad hoc activity, or a regular pursuit. For some galleries, sales of contemporary art are flourishing. A recently established Fife-based gallery regularly sells over 75% of work on exhibition. However, building up a customer base in Scotland can also be challenging and requires sustained effort. For some types of art, there is an extremely limited market in Scotland and galleries are obliged to seek markets outside of the country; the costs of which can be prohibitive. With the current pandemic, the importance of the building a collecting base in Scotland is more vital than before.

According to several gallerists, high value and 3D artworks are difficult to sell online unless customers are already familiar with the work. Recognising this, From the Studio, who do not have a physical gallery, have made the strategic decision to only sell prints and works on paper up to a certain price point (between £100 and £890). Storing, packing and shipping prints and works on paper are also more straightforward than 3D works.

For the exhibiting societies, small scale artworks priced under £250 sell well. As societies such as the SSA are showing fewer artists and work that is harder to sell such as performance or new media work, sales are lower than in previous years. Some exhibiting societies have cited the importance of healthcare trusts as customers.

There is a growing market for batch produced work such as jewellery, knitwear and ceramics. Price is an important factor; many makers cited that customers were comfortable with a price point of around £45 for a single item. For online sales, it is harder for many sellers to get a sense of who their customers are particularly for one-off, smaller transactions. For one-off unique, high value pieces of craft or design, the market is very small in Scotland and makers tend to seek markets outside of Scotland.

Pop-up shops such as the Craft Scotland summer show in Edinburgh take advantage of the swelling of numbers to the city during the Edinburgh festival. Here the average value per sale was £69 with the highest value sale at £690. Advertising in the fringe festival programme attracts many new customers and gross sales have almost trebled since 2013. The Art Car Boot Sale held at SWG3 in Glasgow attracts the extensive arts community in the central belt as well as the existing customer base at SWG3. Over £100,000 of sales were made in 2017 and £72,000 in 2018, all of which went directly to the artists.

The open studios events offer a diverse range of work at varying price points. For many artists this is an opportunity to directly engage with the public and build their profile. Sales vary considerably from studio to studio and year to year; a studio might make over £9,000 of sales, another may barely cover their costs. Sometimes the studio events can lead to commissions. In the case of Spring Fling, 50% to 60% of visitors came from outside Dumfries and Galloway (25% of which were from Scotland) in 2018. The majority of visitors were 50+. Spring Fling are programming events to attract more families and younger people.

According to Artsy, international Art Fairs generated an estimated $12.7 billion in profits for exhibiting galleries in 2015. In terms of international Craft and Design Fairs, Collect generated sales of around £1.3m in 2019, slightly down from 2018 which estimated £1.4m and £1.5m in 2017. Craft Scotland performed well in both 2018 and 2019. In 2019, buyers were mainly from the UK whereas previously there had been more international customers. They also stated that all the galleries are after the same small pool of buyers. In terms of trade fairs, wholesale are ordering closer to the season nowadays. Retail in general is not very secure; companies are uncertain about the future of their business even in 6 months' time. Many tend to order at the last minute which can be problematic in terms of having enough stock.

For artists, makers and designers, finding the right platform is key. One artist remarked that they were unable to find buyers in their hometown in Scotland and that people considered their work too expensive although most were under £1,000 for an original painting. The majority of their customers, along with their gallery, are in the south of England.

At degree shows, any sales are handled directly by the students rather than through the colleges and therefore it has been difficult to track customers, scale and amounts. Some colleges are interested in tracking sales figures and are exploring the best method of gathering this data. In some cases, students have been underreporting sales as they are concerned the college might ask for a commission. Anecdotally sales tend to be local, both individuals and businesses. The schools of art tend to acquire a number of students' work each year.

Looking forward, research into attitudes and behaviours amongst target audiences and customers for visual art, design and craft would give greater insights into consumer behaviour, particularly in the context of the current pandemic.

9 Ideas Generated through the Research

Given the breadth of the remit, a multitude of ideas for development have emerged through the research, either directly suggested by the interviewees or by the report's author. See below:

Financial

- Rate relief, rent controls and/or business support for galleries and micro businesses in craft and design.
- Tax breaks for artists, makers and designers.
- Universal basic income.
- Financial support for artists, makers and designers to take part in fairs.
- Financial support for galleries to take part in international art fairs.
- Financial support for both established and emerging curators and producers.
- There are limited avenues for artists with an experimental practice to sell their work in Scotland and there is a potentially sizeable untapped market internationally for this kind of work. Support for start-up galleries (online and physical) to understand and access new markets and develop a growth plan would be helpful.
- For established galleries, ongoing support to access online platforms such as Artsy would be useful.
- International showcasing initiatives at major platforms (e.g., cultural sporting, intergovernmental), are important opportunities to build visibility and access new markets. Continued support for such initiatives are even more critical at a time of political uncertainty.
- Small bursaries to allow makers and designers to do market research and business development would be helpful.
- Administrative support for organising pop-up events such as regular craft and design markets and art car boot sales would contribute to their long-term sustainability.

Developmental

- Build up a culture of patronage in Scotland which is still largely underdeveloped.
- Craft and design is further developed in order to build a culture for appreciating and buying contemporary craft and design e.g., support craft curators, new writing, exhibition making.
- A dedicated centre for craft and design in Scotland.
- An international craft biennale and/or international craft and design fair in Scotland.
- Incentives for setting up physical retail spaces for makers to sell their work, in particular on the high street.
- An international contemporary art fair in Scotland.
- An annual prize for contemporary art
- An annual exhibition celebrating Scotland's design and craft graduates along the lines of New Designers (held in London).
- Developing individual's and organisation's online potential to promote and sell their work
- Scotland has a wealth of knowledge and skills in contemporary art practice and exhibition making; there is potential to harness experience to create a new generation of galleries. Identifying ways of providing support for new initiatives would be helpful.
- The SSA's large increase in membership evidences a clear demand for more exhibiting opportunities and support for artists. Resources to enable the societies to continue to develop more diverse and responsive programmes and selling opportunities for members would be helpful.
- A brokering agency for artists to more easily identify suitable galleries.
- An advisory service for fine art graduates and emerging artists e.g. surgeries, workshops, resource materials.

Skills

- Training in digital marketing and sales. This has become even more critical as a result of COVID-19.
- Training of dedicated sales staff in public gallery shops and a co-ordinated approach to training the wider team.
- Training in accessing international markets.
- More professional development opportunities for visual artists; graduates, emerging and established artists. Whereas makers and designers have the opportunity to take part in Craft Scotland and Craft Council's CPD programmes, there are fewer opportunities for visual artists. Courses for artists in e.g., marketing, PR, website development; surgeries, workshops, advisory sessions, resource materials would be helpful. *Artquest* has some helpful information such as a primer for new graduates but it is very London focused.
- Where there are gaps in art college provision, introduce more comprehensive training and advice for students e.g., finding the right selling platform, pricing, editioning, marketing etc. This is particularly important in terms of retaining graduates in Scotland working within the arts and creative industries.
- Mentoring for artists, makers and designers.
- Sales and retail staff from different organisations across the sector share practice, experiences and skills and have opportunities for joint training.

Visibility

- Building and maintaining a strong social media presence is important.
- In contrast to makers, few artists have online shops on their websites. Further work could be carried out to identify the root causes of this.

Strategic

- Long-term sales strategies are developed:
- Developing digital sales strategies
- Bring in expertise where needed. A small amount of resource to engage a specialist can make a significant difference to sales.
- Explore ways of boosting sales such as producing limited editions.
- Identify year round selling opportunities for exhibiting societies and open studios events e.g., online.
- Identify year round selling opportunities for art colleges. The GSA shop (although currently closed due to the fire) is a good model.
- Stronger promotion of degree shows nationally and create public facing websites for each of the degree shows. Edinburgh College of Art's updated website (introduced in 2018) is an excellent example.
- Identify ways of tapping into more of the tourism markets, e.g., organising high quality events during the Edinburgh Festivals, over and above the Craft Scotland summer show.
- Explore holding art car boot sales at other times of the year and in other cities, and to coincide with major platforms such as Glasgow International where a specialist art audience is in town.
- Invest in showcasing students' and graduates' work in targeted platforms such as the design show Top Drawer. New Designers run a graduate programme, One Year In to feature 'a curated showcase of the most promising and intriguing designers, studios and entrepreneurs who have recently launched their own businesses'. This idea could be replicated across other platforms.
- **Sustainability:** whilst there are many pop-up events taking place across Scotland, there are few physical retail spaces for makers to sell their work, in particular on our high streets. Without a year round presence, it can be challenging to build new audiences, both locals and tourists.

Underdeveloped Cultural Patronage

Generally, it was lamented there is not a culture of patronage of the arts in Scotland and no "decent patron scheme in Scotland that works". There is also a sense that the potential for support from Scotland's large diaspora is largely unrealised.

Cultural Assets and Tourism

It was considered that the tourism market for contemporary art was underexploited and that local authorities could do more to promote the cultural assets in the region. A more joined up approach with other local authorities in terms of marketing would be helpful.

10 Suggested Actions

This short study highlights some of the barriers and challenges artists, makers and designers face in selling work and also presents an extensive list of ideas for improvement, generated through the research, as outlined in Section 9.

Below is a series of recommendations/suggested actions taken from this long list of ideas in section 9. Feedback from the draft study has helped to inform this list, however the ideas are intentionally not prioritised; the value of each will depend on the reader's own interests and priorities.

Financial

All of our interviewees cited the need for financial support as one of their biggest priorities. Many galleries would like to see rate relief, rent control and business support since for many galleries, the cost of operating in town centres is becoming prohibitive. Practitioners and micro businesses in visual art, craft and design would like to have tax breaks, particularly in the current pandemic which is putting enormous pressure on the sector.

The availability of small bursaries for artists, makers, designers, curators and producers e.g., for market research, business development, travel would be very helpful. Makers and designers tend not to apply to the Creative Scotland Open fund so some work around making that more accessible to them might be useful.

Pop-up events such as craft and design markets and art car boot sales have grown significantly (pre-COVID-19) and proved to be very popular amongst the public. However, these events are administratively heavy to organise and some support to ensure the continuation of such events would be helpful.

Exhibiting societies play a critical role in creating selling opportunities for their extensive membership. Paid administrative support, rather than relying on voluntary help, is necessary in order to continue to develop diverse and responsive programmes for members.

Many artists, makers and designers rely on art, design and craft fairs to reach their markets. Financial support for participation costs, particularly where travel is involved, would be helpful. In Scotland there is an underdeveloped market for some forms of art practice (what might be termed experimental art). In order for galleries showing this kind of work to access their markets, having a platform at national and international fairs is critical. Financial support for galleries to take part in such fairs over a number of consecutive years is necessary if these galleries are to grow their business.

Established galleries have emphasised the value in growing the gallery sector. Financial support for start-up galleries (online and physical) to understand and access new markets and develop a growth plan would be useful.

With the current pandemic, fewer people are visiting galleries in person and therefore an online presence is more important than ever before. Financial support for galleries, artists, makers and designers to develop their online potential would be very useful.

Developmental

One of the biggest areas highlighted for development was the need to strengthen the culture for appreciating and buying contemporary craft and design. Recommendations include supporting craft curators, new writing and exhibition making. An international craft biennale and/or international craft and design fair in Scotland could bring international audiences as well as fostering local audiences. A dedicated national centre and shop for craft and design would also help to build markets. Retaining graduates is important as too often they leave Scotland to find opportunities elsewhere. An annual exhibition celebrating Scotland's design and craft graduates along the lines of New Designers (held in London) is one route forward.

Whereas craft and design markets (pre-COVID-19) were prevalent, there are few permanent physical stores selling craft and design. Financial incentives for setting up physical retail spaces for makers and designers to sell their work, in particular on the high street, would foster healthy creative communities in our town centres.

Another significant area sited for development was building a market in Scotland for what might be termed experimental art. Many artists and galleries are reliant on markets outside of Scotland to sell their work. With the onset of COVID-19, international travel has been curtailed and the concept of the ‘hyper local’ has become increasingly important. Recommendations include creating an art fair of international significance and hosting an annual contemporary art prize which would raise the profile of contemporary visual arts in Scotland. More focus on building a stronger culture of patronage in Scotland was also cited as important. This would in turn help to grow museum acquisitions and commissions.

With the imminent departure of the UK from the European Union, the international visibility of Scotland is more important than before. Identifying opportunities to showcase at major international platforms (cultural, sporting, intergovernmental) would be useful. Building a consistent presence for craft and design at key international fairs, e.g., London, Milan, Eindhoven was cited as important.

Some artists cited the need for a brokering agency to match artists up with suitable galleries. Others suggested a market advisory service for artists, makers and designers.

Skills

Artists, makers and designers would like more professional development opportunities, training and advice in for example marketing, PR, website development, pricing, editioning. There are particular gaps in such provision for artists. More comprehensive training and advice for art and design students for example in pricing, editioning and marketing would also be helpful.

Developing skills for selling internationally – technical and cultural as well as business – was seen by many as a priority.

Sales training for exhibition organisers, retail and sales staff would be helpful particularly for publicly funded, not for profit organisations. There is an appetite from the sector to share practice, experiences and skills in sales; creating opportunities to facilitate this would be useful.

Since COVID-19, the demand for digital skills has significantly increased.

Strategic

Many organisations would like support to develop long-term sales strategies, such as specialist sales support. Exhibiting societies, art colleges and open studios are keen to identify year round selling opportunities through for example digital platforms.

As so much activity has moved online since the pandemic, support for galleries to feature on online platforms such as Artsy would be helpful.

Supporting wider networking and marketing of selling opportunities across Scotland was also seen as a priority.

For organisations to continue to grow and scale up, sustained support over a period of years is important as it takes time to access markets and build a customer base.

Research into attitudes and behaviours amongst target audiences and customers for visual art, design and craft would give greater insights into consumer behaviour.

To conclude, this research identified development needs of varying scale across all eight selling platforms. Since the global pandemic, the conditions for selling have changed substantially with online selling becoming critical across all platforms. Given the limitations in the research in terms of scale, and recent global changes, further in-depth studies are recommended, in particular the impact of COVID-19 on selling platforms.

11 Contributors

Advisory Group

Malcolm Dickson, Director, Streetlevel Photoworks

Patricia Fleming, Director, Patricia Fleming Projects

Elisabeth Gibson, Director, Project Ability

Irene Kernan, Director, Craft Scotland

Mhari McMullan, Manager, Welcome Home

David McCracken, Print Curator, Peacock Visual Arts

Trudy Shillum, Designer and Events Organiser

Interviewees

One to one interviews were held with 22 individuals from a cross section of relevant organisations in the fields of visual art, craft and design with a sales remit as well as makers, artists and designers. They were selected to provide a diverse range of experiences of selling work across Scotland and internationally.

12 Sources and Further References

- Artmag
- Artsy
- ARTHOUSE Unlimited
- Artquest
- Artwork
- Baltic shop
- Clicks and Mortar
- Craft Scotland
- Crafts Council
- Craft In An Age of Change report 2012, Crafts Council
- Craft Scotland State of the Sector report 2017
- Creative Industries Strategy, Creative Scotland
- Visual Art Sector Review, Creative Scotland
- Culture Counts
- Design Council
- The Design Trust
- Etsy
- www.gov.uk/guidance/tradeshow-access-programme
- House of Voltaire
- IntoArt
- MAKE
- Own Art
- Scottish Design Exchange
- Welcome Home store

CREATIVE SCOTLAND

ALBA | CHRUTHACHAIL

Waverley Gate
2-4 Waterloo Place
Edinburgh EH1 3EG
Scotland UK

The Lighthouse
Mitchell Lane
Glasgow G1 3NU
Scotland UK

Reception +44 (0) 330 333 2000
enquiries@creativescotland.com

www.creativescotland.com
@creativescots

Awarding funds from
THE NATIONAL LOTTERY®