BRITISH COUNCIL

Crafting Futures Georgia

Georgia Craft Research Report

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Executive summary

This study of a sample of the perspective of 50 craftspeople from across Georgia explores their business practices (including income and growth), teaching and learning, physical making spaces, internet use, attitudes to environmental sustainability, and perceptions of their own sector. It also considers the impact of the covid-19 pandemic.

One aim was to gauge the progress or difference in the craft sector since the extensive study by the Georgian Arts and Culture Centre was undertaken in 2012, particularly understanding changes to incomes and whether growth is occurring in the sector. Though there is variation at an individual level, it appears that craft in Georgia is growing. Production and income from craft is increasing, though held back significantly by the pandemic in 2020 and 2021. There was comparatively little adaptation to the circumstances of the pandemic by our respondents, which needs addressing to build future resilience. 64% reported a loss of income due to reduced sales during the pandemic.

Craft practice is generally an individual pursuit for our respondents, who work in a direct manner with their customers, and are in control of the narrative of their work. Where they do work within family groups, people are more likely to be educated informally. Most makers' work at home or in their own workshops, which poses an issue for those entering the market who do not have access to a suitable environment. Georgians are making good use of the internet for craft businesses (mostly for selling, not sourcing materials) but this should be developed further to increase resilience in the face of political and economic instability, and regional conflict. 20% of our respondents saw an increase in online sales during the pandemic, and only 6% reported fewer online sales.

While designs are generally a mix of traditional and contemporary styles that for most makers are regularly changed and updated, techniques tend not to change as much. People are mostly sourcing their materials in the same way as they were 5 years ago with a shift to sourcing materials online for a small number of respondents. Awareness of digital technologies is high, but uptake is low (18%).

Georgian craft is being bought by locals, domestic visitors and international tourists, with tourism badly affected by the pandemic this has had an adverse effect on craftspeople but partly because of a varied customer base, this has not been completely catastrophic, with a small number of makers reporting an increase in sales during the pandemic.

Craftspeople have a fairly good idea of how to improve their businesses but perhaps need some support to achieve this. This could come from peer learning. However, some have a more passive attitude, reflecting the challenging economic and political circumstances, but also this is a barrier to progress.

We surveyed a high number of self-taught craftspeople; they remain a significant proportion of informally educated craftspeople. Most have gone on to teach others formally or informally. The studio/workshop or home studio are important sites of teaching. There is significant interest in the craft from young people, whose interest can be encouraged and facilitated in both formal and informal settings. Our respondents are more likely to pass their skills on to someone outside of their family group, but there is still a significant tradition of passing crafts skills on within families that has great potential for further research and investigation.

We have learnt that environmental sustainability and notions of being environmentally friendly are important Georgian makers, though they may not always know or understand how to articulate this in the narrative around their work. Learning more about this area will be beneficial to craftspeople.

While the perception of the sector is not overwhelmingly positive, it suggests a strong, resilient and active community of makers working in challenging circumstances.

Introduction

The British Council's Crafting Futures is a global programme which aims for a sustainable future through making and collaboration – supporting a future for craft by understanding its value in our history, culture and world today.

The programme brings together craft practitioners, designers and organisations from around the world to explore possibilities for this future together. In Georgia, Arts University Plymouth is working with a range of partners. For the research project this is the Georgian Arts and Culture Centre (GACC).

Crafting Futures is tailored to the needs of the local communities, and the British Council's inclusive approach means it is open to craft practitioners of any background in any location. In Georgia the overarching focus is on craft education. While part of the programme is focused on formal creative education for young people in the Vocational Education and Training (VET) sector, there is a strong tradition of informal education in craft so we felt it was important to consider this within this research and to focus primarily on craftspeople with involvement in informal education. Both formal and informal education are important for the health of the sector and the market. This report provides an overview of the sector to support educational and development initiatives.

Research Team

Dr Kim Bagley - Craft specialist and Making Futures Fellow at Arts University Plymouth. UK Academic lead for the project.

- Questionnaire adaptation, data and response analysis, report writing, research assistant training.

Maka Dvalishvili - Director of the Georgian Arts and Culture Centre

- Logistical and professional support for research assistants, respondent shortlisting, questionnaire adaptation.

Tamar Kiknadze - Programmes development consultant, Georgian Arts and Culture Centre

- Fieldwork coordination, research and response collection, questionnaire analysis and review; report review and contributions to report writing.

Natia Trapaidze - Research Coordinator

- Fieldwork coordination, research and response collection, questionnaire review, photography

Mariam Kakhniashvili - Research Assistant

- Fieldwork research and response collection, data entry, questionnaire review

Salome Gviniashvili - Research Assistant

- Questionnaire review, data entry, response translation

Makuna Gotsadze - Photography

The precedent and purpose for this study

This study is to an extent based on the Study of the Traditional Crafts Sector in Georgia conducted by the Georgian Arts and Culture Centre in 2012. The new study is smaller in scale and focuses only on the perspectives craftspeople themselves[1]. The focus is on the growth of Georgian crafts, as well as the sustainability of the sector. An important aspect of sustainability is the transfer and learning of skills. Therefore it explores, in particular, informal and home-based learning alongside current global concerns in craft practices.

The purpose of the study is to learn more about the sector to inform further research and development initiatives and to create an impression of the sector for future reference, for development agencies, governmental agencies and education providers. Questions focused on the following areas:

- The craft work itself
- Learning (informal, and intergenerational)
- Teaching (informal, and intergenerational)
- Income and growth
- The impact of the covid-19 pandemic
- The craft making space and habits of craftspeople
- Internet use
- Environmental sustainability
- Perceptions of the sector by the craftspeople themselves.

The impact of the current pandemic situation on craft practice is also recorded, as well as building a general picture of what craft is being made, how it is being made and how it can be described.

Methods and Collection Process

The study collected primary data through a detailed questionnaire with a sample of 50 people who are professional craftspeople. Many engage in informal learning and/or teaching. The list of respondents was initially generated using prior knowledge, including the original GACC study. Further intel was acquired during the fieldwork process to find and involve other suitable

[1] The original study considered retail and customers in addition to the craftspeople.

interviewees. Inclusion criteria were flexible, but participants were all professional craftspeople. The original study focused on traditional crafts only. For this study the scope was broadened to include a wider range of practices, though the majority are engaged in traditional crafts. A range of practices, ages and both male and female respondents were included to give breadth. The sample is a representative (though imprecise) cross-section of craftspeople working in Georgia. The responses are an effective snap-shot of craft in Georgia as validated by other recent studies.

The questions were asked verbally and questionnaires were completed by the research team who were able to provide clarity and conversation leading to full responses. Visual photo and video documentation was recorded by the research assistants to document the fieldwork. All respondents consented to the use of their information and images. Demographic data and personal information was collected, but this data is anonymised for reporting purposes. Work and persons in photographs are attributed.

The research coordinator and two research assistants were trained online in good fieldwork practice by Dr Kim Bagley of Arts University Plymouth in advance of the fieldwork process and ethical clearance was sought at the University. The third research assistant joined the team after the training and undertook photographic documentation. The research coordinator and research assistants had prior knowledge and experience of craft practice as well as suitable communication skills in English and Georgian. Maka Dvalishvili supported the research assistants in Georgia with her knowledge of Georgian craft, her prior research experience, and with her networks. The research team reviewed the research questionnaire to ensure local applicability and appropriateness of the questions asked before fieldwork commenced.

Fieldwork was undertaken in Spring 2021 observing government protocols in relation to the Covid-19 pandemic. Due to restrictions, and adverse weather conditions, a small number of interviews were undertaken online via video call.

Limitations

Though a substantial number of respondents were included, the study is limited by the sample size. Though it is significant and likely representative of the sector, it does not cover all professionals. Tbilisi was included, and represents the largest number of respondents from a single geographic area. While the questionnaire was lengthy, and the range of topics covered was extensive, the overall scale and funding of the study meant that it did not cover any single issue in detail. Working in an interdisciplinary, international team brought a range of perspectives, but it is acknowledged that the author of this report is an english-speaking academic without insider cultural knowledge and limited first hand cultural experience.

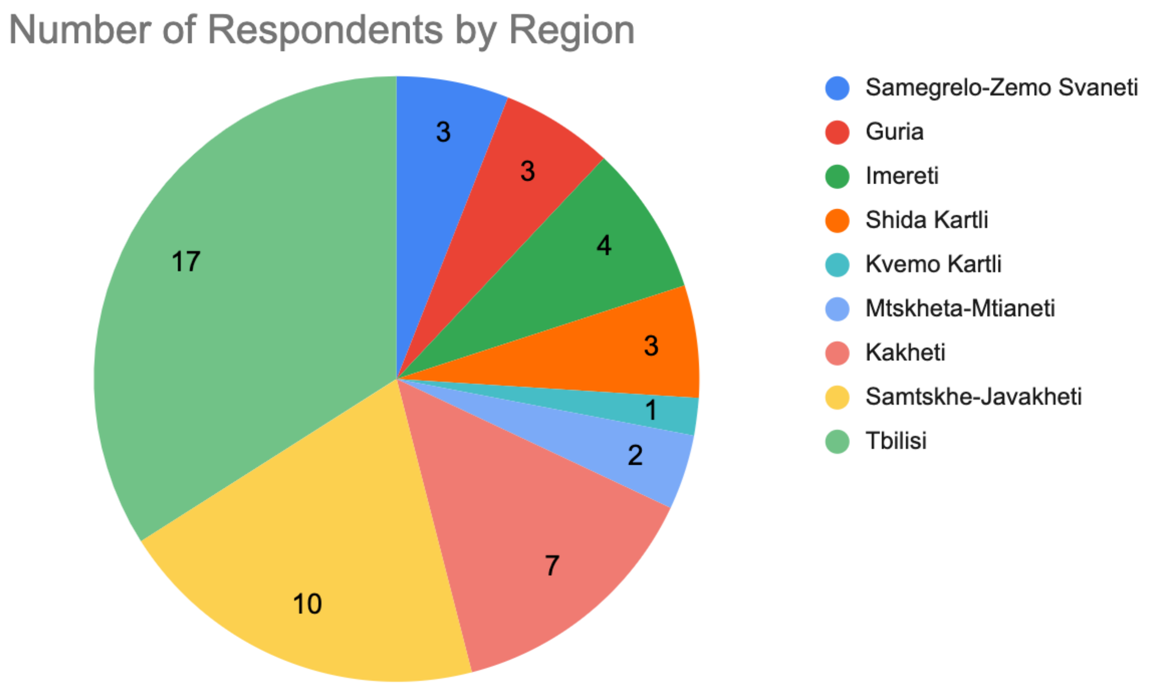
Each respondent is an individual with their own hopes, fears, and emotions in relation to their practice and the world around them. Their response to the study comes from this perspective and will naturally include individual biases, and some apparent contradictions in the data. These do not invalidate the study, but rather give it a sense of humanity - an important element of craft practices. The study primarily gathers the craftspeople’s own perspectives.

This study does not address issues of government policy and is therefore unable to make recommendations that relate to law or policy. It does not provide an historic overview of Georgian crafts. This was included in detail in the original 2012 study. In addition, there is significant existing literature available for interested readers.

Demographics of respondents

50 professional crafts persons in Georgia were interviewed by the research team. There was an equal gender split between men and women. Women are over represented in textile crafts and men in metalwork, ceramics and woodwork. 48 out of 50 respondents identified themselves as Georgian nationals, with one Armenian and one who did not record their national identity. Both the average and median ages of respondents is 57 years. The oldest respondent was 88 and the youngest 28. The length of respondents' careers in crafts was recorded. Many respondents, particularly older respondents, began their craft practice in childhood, with some very long careers of over 60 years recorded, with the longest career being 84 years. This does suggest an ageing workforce, but because the inclusion criteria expected a professional skill level, this may not be the case across the sector; mastery takes time. This study mostly looks at the perspectives of mature and established professionals. This is because they are the keepers of craft skill and knowledge. See the Teaching and Learning section for more details and young people's engagement with our respondents.

Respondents' locations included the city of Tbilisi (17 respondents, 34%) and 8 regions detailed in the chart below and covering most parts of the country. In this regard, the sample was quite similar with the 2012 study, where the share of craftspeople located in the capital city was 32.7%.



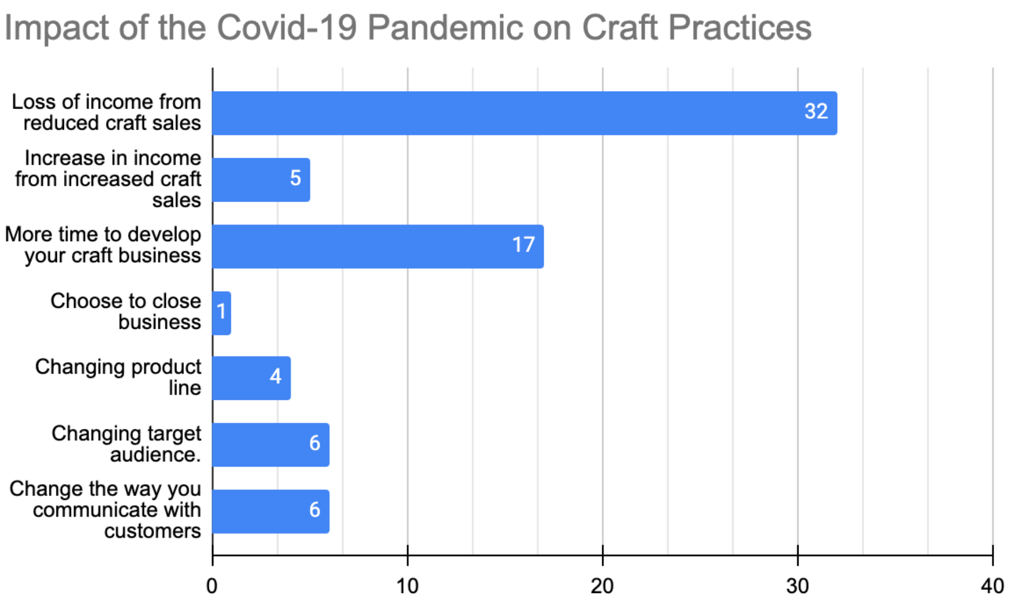
The range of crafts or material specialities represented is wide, including metalwork (ranging from fine jewellery to weapon making), woodwork, ceramics, basketry, leather work and those working with stone and bone. There are a range of textile practices represented including weaving, embroidery, macrame, batik, machine and hand knitting.

The Impact of the Covid-19 Pandemic

This research was undertaken during the covid-19 pandemic, which had a significant impact on the Georgian economy. The overall decrease from January to October 2020 was 5.1% (Bamchavadze, 2021). A study of 1938 businesses from various sectors focused on microenterprises was conducted by PricewaterhouseCoopers Georgia LLC. It revealed that for May 2020 revenues dropped by more than half for 65% of respondents. The GACC conducted a survey in February, 2021, which showed that the craft sector was one of those which was hardest hit by the pandemic.

Consequently, it was impossible to ignore the impact on our respondents, and an opportunity to capture its effects. While the pandemic came up in many answers to our questions, we asked one specific question about the impact of the pandemic on our respondents' craft practices. The impact on income is negative, but overall the response is mixed and indicates a nuanced picture. 32 respondents all said that the pandemic led to a “loss of income from reduced craft sales”, though only 1 person chose to close their business. Although the mentioned GACC survey showed more severe influence, with 61 (85.9%) persons out of 71 stating the significant loss of income, 8 (10.96%) some loss and 2 craftspeople (2.8%) termination of business, but in general the results comply with the current study.

A significant proportion of respondents (17) said they have more time to develop their business. 4 respondents changed their product line and only 6 changed their target audience and communication methods. 5 reported an increase in sales. This suggests that for most respondents, they did not have tools, resources, skills or motivation to change how they worked in response to the pandemic, but that there are some more flexible and agile makers who were able adapt to changed circumstances or for whom the change in circumstances had a positive impact.



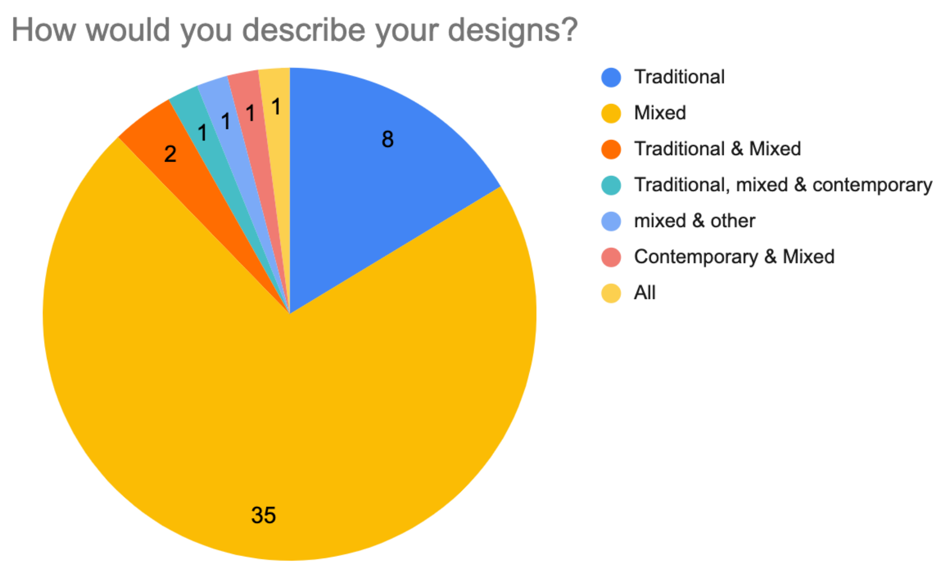
While reduction in income is to be expected considering the unprecedented nature of the pandemic, with its truly global impact and governmental restrictions, it is nevertheless surprising and worrying that there was limited adaptation evident from many respondents one year into the pandemic.

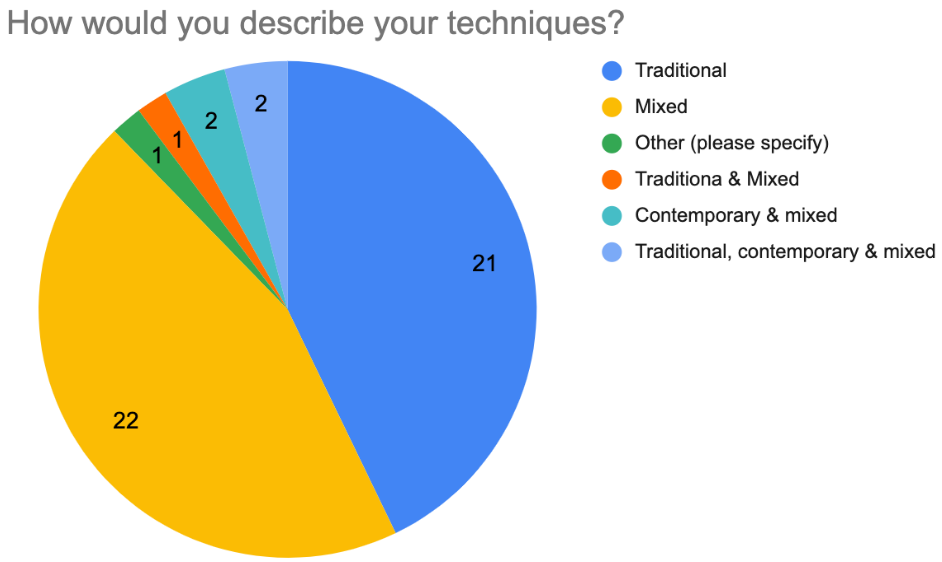
Craft and business practices of respondents

This section establishes the characteristics of craft production undertaken by the respondents. It also captures changes in the recent past including the effect of the pandemic. Day to day aspects of running a craft business are also explored, including stock management, quality control, sales locations and working with others. Changes to income, and internet literacy and use complete the picture of how craft businesses operate.

Categorising craft work

Respondents described their designs and their techniques as Traditional, Contemporary, Mixed (both traditional and contemporary) or other. Contemporary is here understood as a style rather than time. Traditional is a neutral term that does not designate work as unchanging or old-fashioned, but rather refers to an established idiom with historic precedent. Most described their work as mixed (41 in total), with traditional a distant second (12 in total). No respondents selected either contemporary or ‘other’ without selecting another category in addition. One respondent selected both contemporary and other, explaining that it depends on the order, though their personal preference is for modern designs. Overall, there is a strong bias towards forms, shapes, colour choice, motifs and patterns that the craftspeople describe as ‘mixed’ which suggests that a traditional design aesthetic remains important, but that the designs and aesthetics of their craft practices are more varied and responsive to contemporary stimuli. There is an awareness of different visual styles, for example, one respondent explained that they had two different lines, one contemporary and one traditional. For the respondent who selected all 4 categories offered, they explained, with their personal professional focus on teaching, that their design style depends on the theme they are teaching.

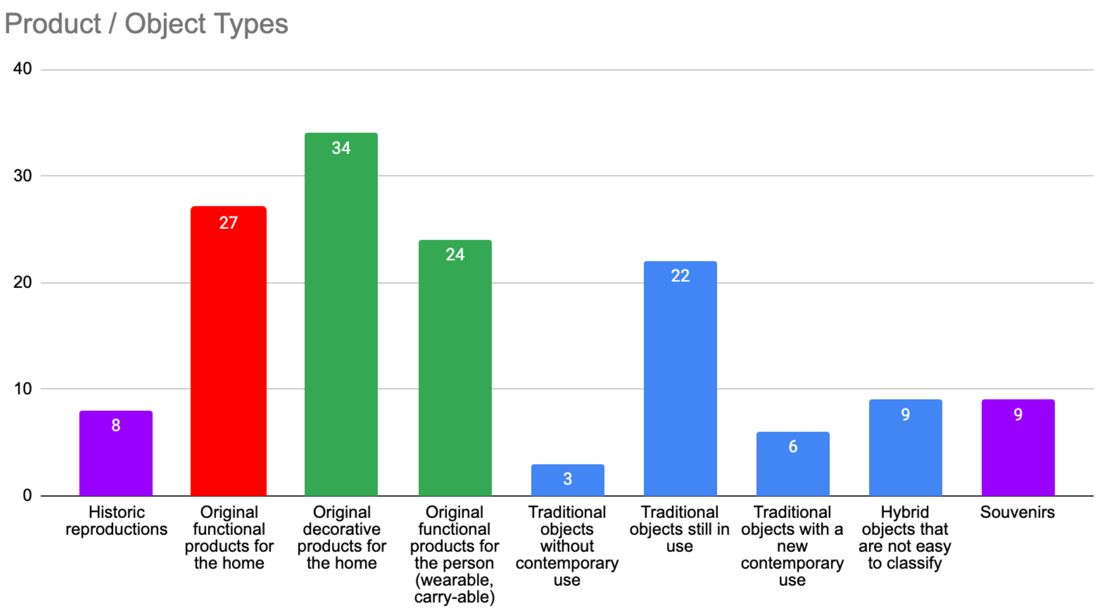




Technique is more split, with 'traditional' techniques more dominant than traditional designs. The person who selected 'other' described their techniques as 'innovative'. Again, no respondents described their techniques as completely contemporary.

They also categorised their products, selecting all relevant categories. Categories included both historic reproductions and souvenirs to capture these specific types of craft object associated with heritage craft and with tourism. Other categories included functional and decorative products for the home, wearable/carryable objects such as clothing or jewellery, and traditional objects, which could be described as 'in use' in the same way they may have been in the past, having a 'new use' (such as s traditional form used for storage or drinking, which is now used as a vase), or traditional objects that are no longer normally in use, and are likely to now be used for decoration, or which serve a nostalgic purpose. These answers give us insight into how craft practices could be marketed or presented, for example within the interior design or fashion contexts.

Decorative products / objects are the most popular type, followed by the 3 most functional categories. Souvenirs, historic reproductions and hybrid objects that are difficult to classify are less popular but are still made by 16 - 18% of respondents. Traditional objects that have lost or changed their use over time are least popular.



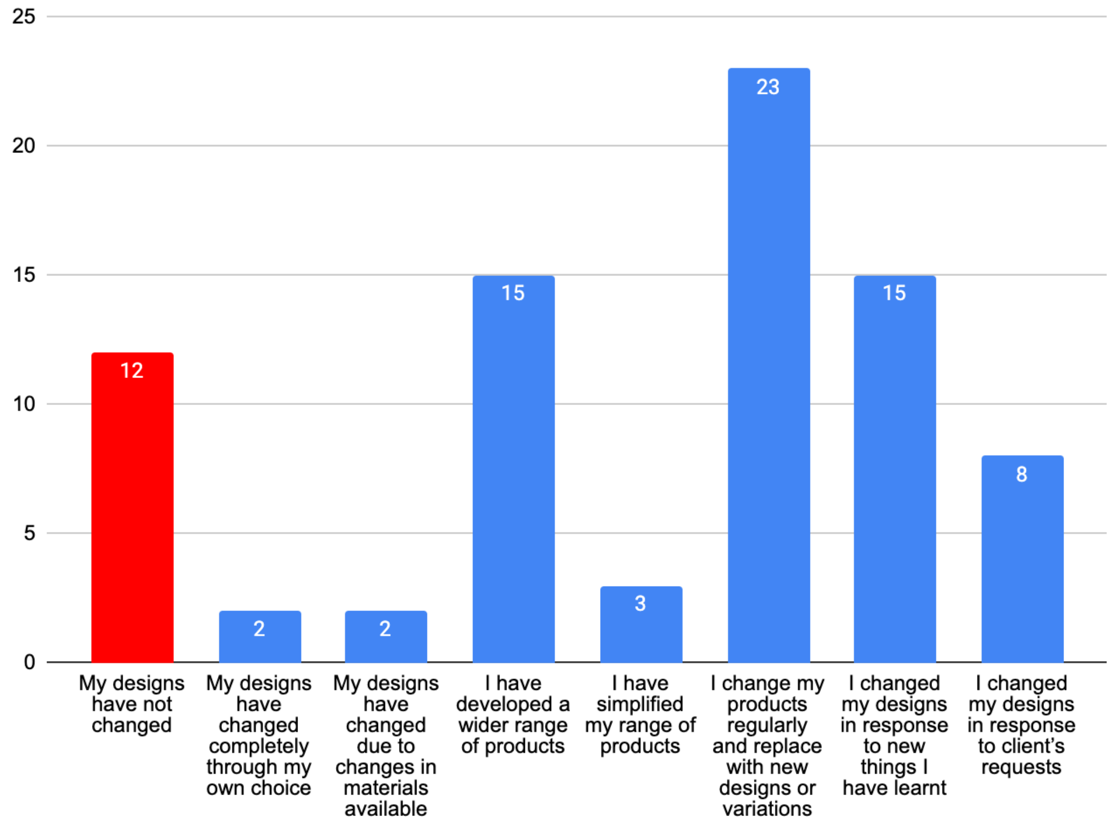
Change and innovation

Adaptation of design is the most common innovation practised within the Georgian craft sector. 20 out of 21 craft entities interviewed in 2021 for the ETF project “Craftsmanship and skills for the future - Study on skills development in the craftsmanship and design sector in ETF’s partner countries” stated that they are continuously adapting product design to market needs. Having in mind that for that particular research the focus was on innovative companies, it can be said that the results of this study better reflect the overall situation within the sector.

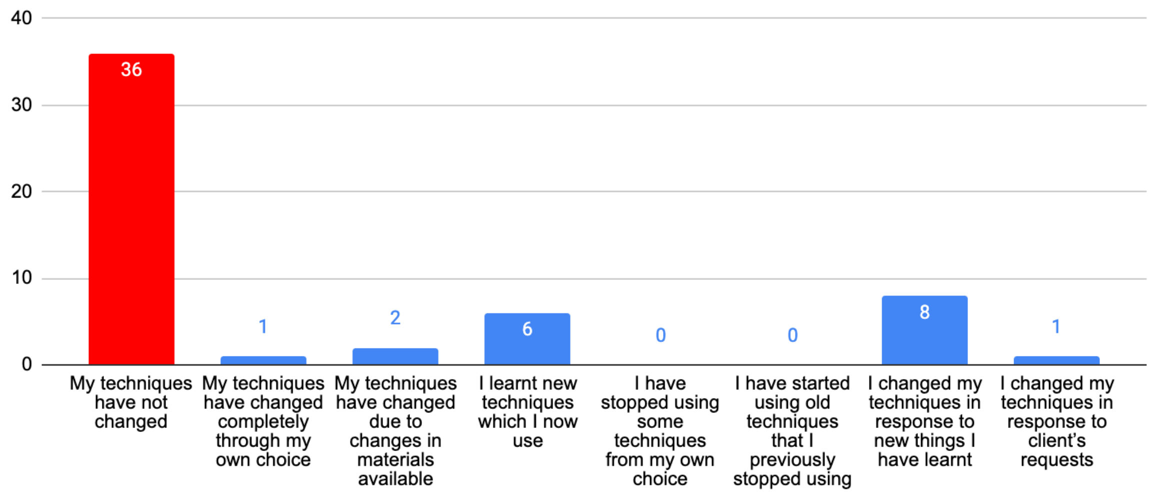
Looking at the last 5 years, most respondents have changed their design and products, with 12 stating that they have not changed their designs. Most of these did not select another category, and if they did it was change in response to client’s requests, with one exception. This indicates that adaptation, change and variation are very much part of the Georgian craft landscape. There are very few examples of forces beyond the respondent’s control, such as material sourcing issues that lead to change, and only 3 respondents said they have simplified their range of products. Design change is driven by the craftspeople themselves, from what they have learnt, or in product development, with client requests less powerful forces. One respondent, who said that she changes her designs in response to new things she learnt, did mention that at the moment she is making less, and on the whole tries to preserve traditional elements.

Regarding technique, the picture is less varied, with 36 respondents not changing technique, and 8 adding to their repertoire or implementing new things they have learnt. Overall, there is a sense that once all the relevant techniques are established and mastered, there isn’t much reason to change, rather just to improve and consolidate. This is summarised by one respondent who said it is necessary to have basic techniques to improve novelty, it is an unchangeable and dynamic process which has to be used by artists to improve her/his skills.

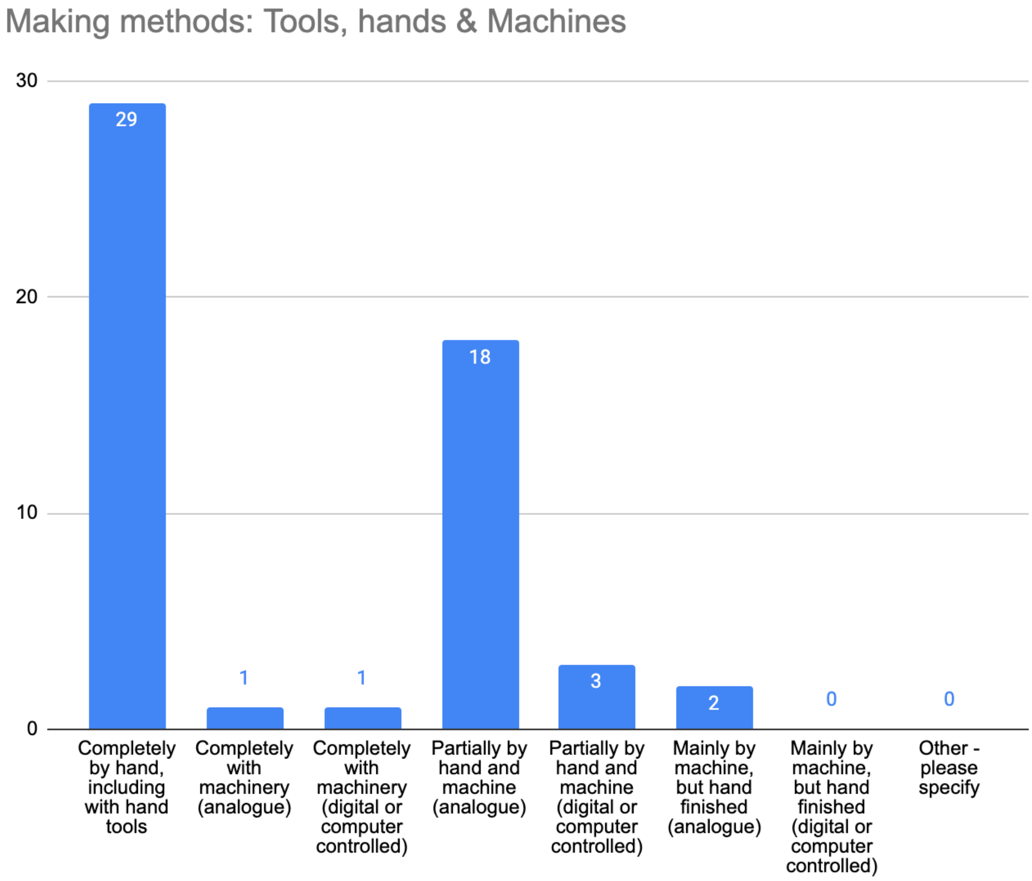
Change to product & design over 5 years



Change in range of techniques over 5 years

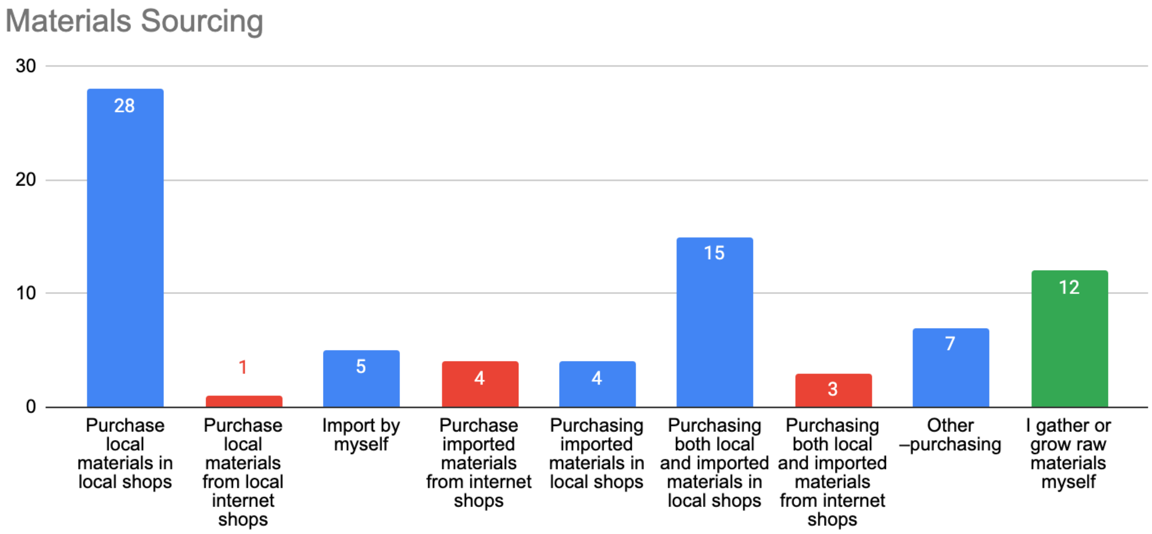


58% make their work by hand (including with hand tools), with 36% using a combination of hand marking and analogue machinery such as pottery wheels and sewing machines. 3 respondents said they use digital or computer-controlled machinery.

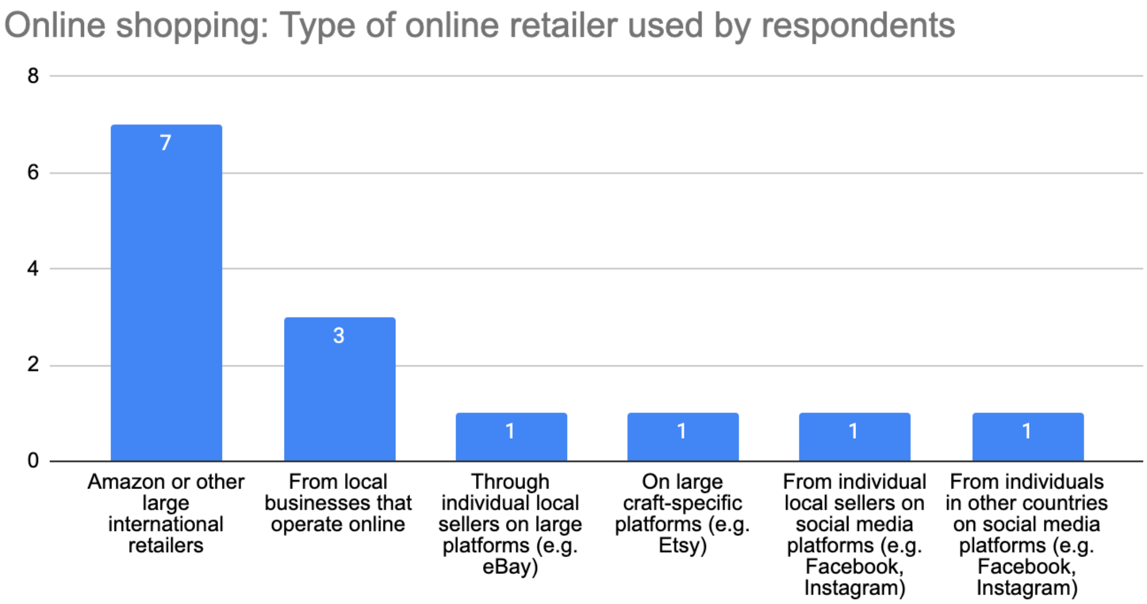


CAD (computer-aided design) and CAM (computer-aided manufacturing) is used alongside analogue and hand-making processes in some craft practices globally. While the majority of respondents are aware of CAD/CAM technologies (80%), only 9 are making use of this in their work. 2 respondents mentioned where they learned about these technologies, including from Enterprise Georgia and USAID. For those who are using CAD/CAM this includes a textile practitioner who sketches on photoshop to create printed materials, another who is using computer rendering and sketching, and another who uses laser printing. A ceramicist mentioned their digital kiln controller and a jeweller makes models using CAD. Another textile practitioner who is not yet using digital technology would like a laser cutter, engraver and fabric printer for her business.

The result is quite similar with that of the interviews conducted for the above mentioned ETF study, where 10 from 21 companies indicated that they use CAD, and 4 use CAM, therefore we can consider that the ratio is representative of the technological innovation of the sector.

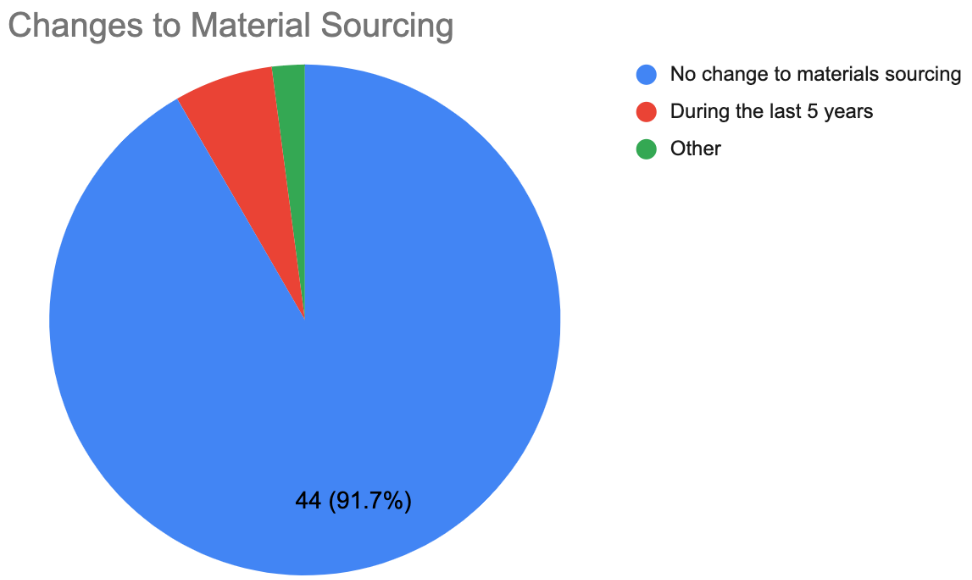


Material sourcing is dependent primarily on local shops, with most respondents buying local or both local and imported materials. A smaller proportion gather some of their own materials. This includes wood, wool, silk (worms), clay, and stone. Physical shops are more important than internet shops, but at least 8 are sourcing materials online. For those who selected 'other,' they spoke about receiving materials as gifts (5), including from friends abroad, or having a large existing stock (2).

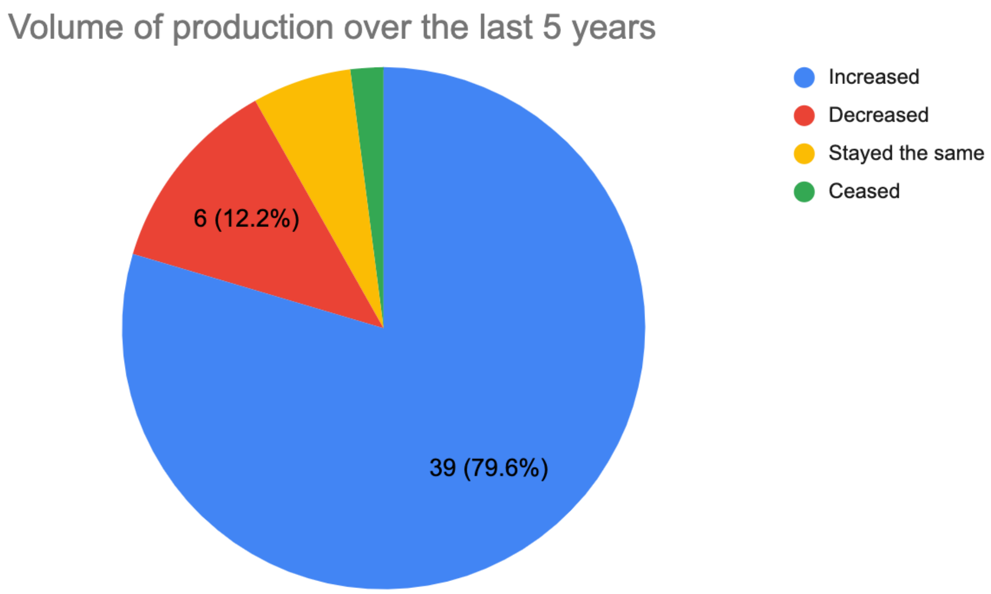


Of the 8 respondents who shop for materials online, the most popular type of shop is a large online retailer. One respondent mentioned previously using such a shop in China. The only respondent not using a large retailer is buying from a local business that operates online. There is no discernible pattern for online materials sourcing in relation to material/profession. Those who are buying online are using a wide range of materials from textiles to ceramics, glass and other materials.

There has been very little change to materials sourcing with no respondents indicating any changes specifically because of the pandemic. Reasons for changes in the last five years include markets closing. For example the ‘Children’s Dream’ market burnt down, so a textile practitioner (embroidery and knitting) is now importing materials from Russia. This could be attributed to less actual production taking place (though this is generally contradicted below), or a lack of flexibility or motivation or possibility to source materials in different ways, or perhaps the pandemic did not adversely affect material sourcing.



Over the last 5 years respondents have generally reported that their production has increased. For those able to respond to that question (49), 39 said that their production has generally increased (including 1 saying it increased only very slightly), though 2 specified that it ceased in the last year, and for 2 it decreased in the last year. For 6 it has decreased, and for 1 it has stayed the same. 3 noted that it stayed stable.



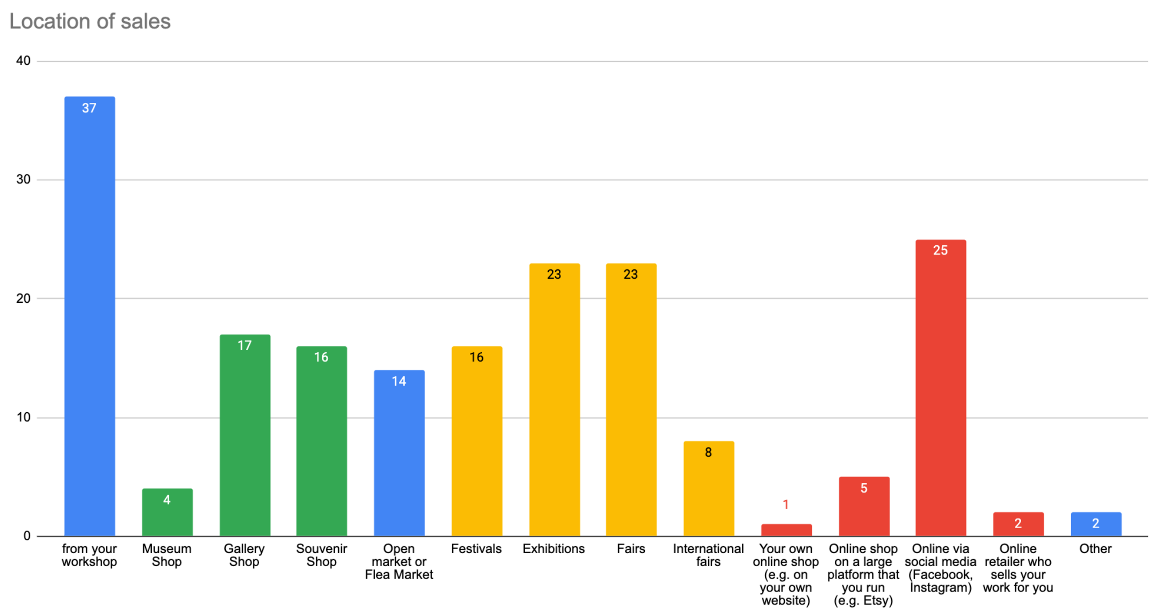
Sales venues are varied with a mix of online and physical outlets being used by respondents. Direct selling is prominent. This was also reported in the GACC study in 2012. Only 1 respondent did not select a form of direct selling (e.g. from their workshop, at a fair or directly via social media online). Craftspeople's own workshops are the most popular (37), followed by temporary events such as festivals, fairs and exhibitions. Physical retail outlets are used by a significant number of craftspeople, and most forms of online selling are used by fewer craftspeople. The most interesting response here is to direct selling via social media. Half of all respondents sell in this way. A large majority sell direct from their workshop, a site where they are fully in control of their narrative and also participate in selling their own work, this is comparable to selling direct via social media - it is fairly casual and likely requires less administration when compared to other forms of selling. There is potential for more growth in online selling, as it is clearly a form of communication and promotion adopted by many of our respondents (see below). Because forms of direct selling are so prominent, it is fair to say that how craftspeople tell the story of their own work is likely key to success in selling.

We asked respondents whether there has been any change to their sales venues during the pandemic. 27, or 54% reported no change.

10 reported more online selling

3 reported less online selling

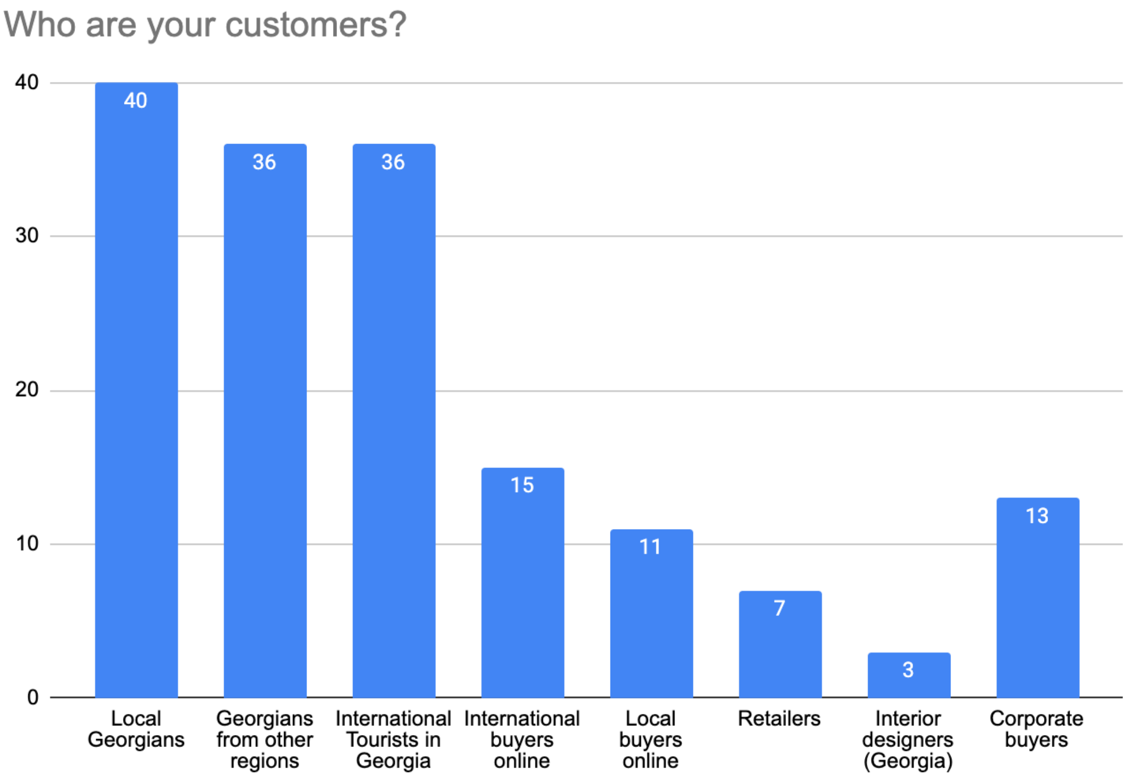
11 reported fewer sales in general (1 of those also reported more online sales), which broadly aligns with the chart above related to production.



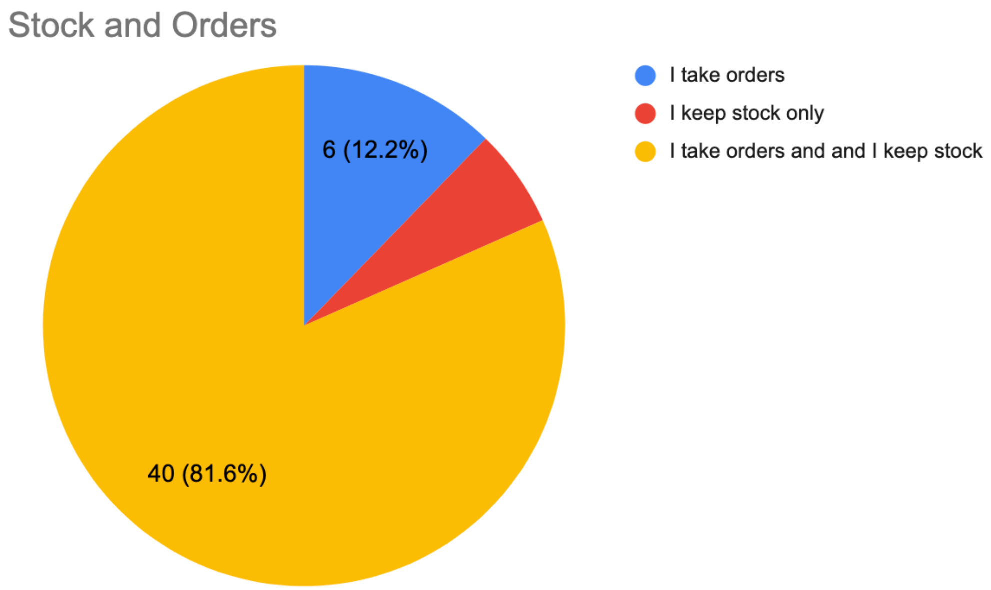
An increase in online sales were also noted in other GACC current studies. 38 out of 71 respondents who participated in the poll assessing the effect of covid-19 stated that they increased internet sales. In general it could be stated that pandemic stimulated integration of online channels in the sales of craftspeople.

Sales and customers

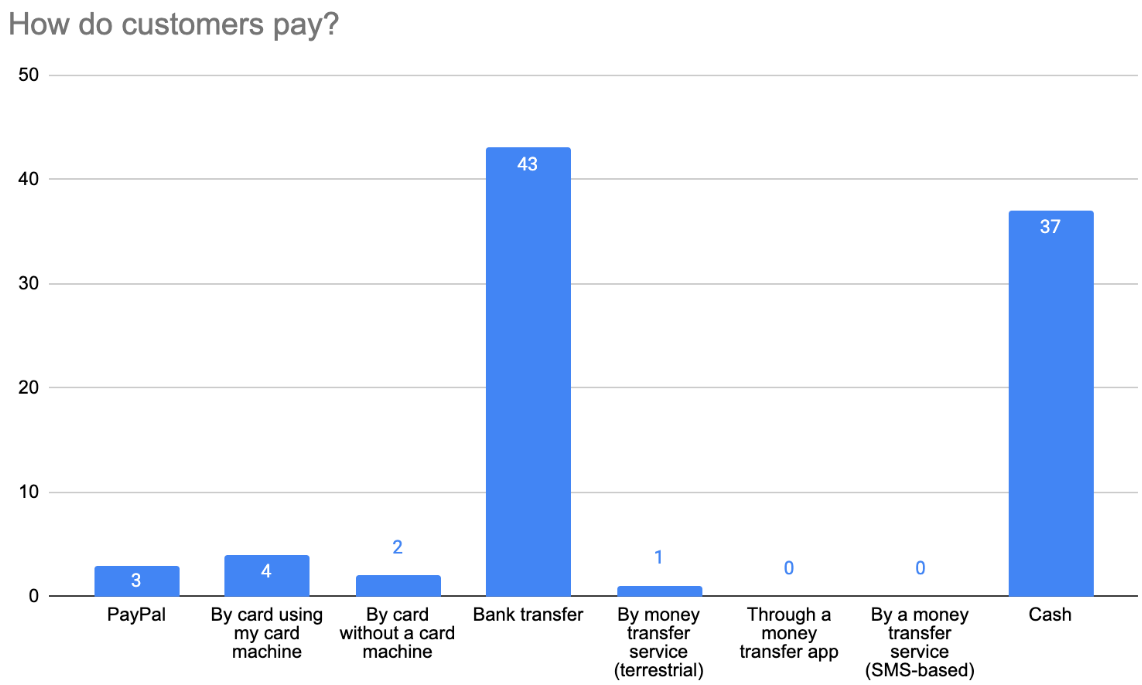
Our respondents sell to a range of customers, with each respondent generally selling to 3 - 4 of the following groups: local Georgians in their area, Georgians from other regions, international tourists in Georgia, international buyers online, retailers, corporate buyers, and in 3 cases, to interior designers in Georgia. Most sell to local people in their area, with Georgians from further afield and international tourists almost as likely to be customers of respondents. This indicates that while tourism is important to many respondents, there is at least some local market for most respondents, this is a good thing if we consider the negative effect of the pandemic on tourism. Although it should be noted that the biggest share of local Georgians in the area is most probably determined by the prevalence of craftspeople from Tbilisi, where the interest of locals in craft objects is higher.



The majority of respondents keep stock and take orders. A basket maker explained that they have stock for a particular reseller and then also take orders online.



Cash and bank transfer are the predominant payment type made to craftspeople in exchange for their products.



As is the case with craft production in many other places, there is no formal quality control. 48 respondents rely on their own skill and knowledge for quality control, in addition some also turn to trusted colleagues to check their work (9) and 27 referred to their own reputation. 3 mentioned that the retailers they sell through check their work and for 2 those retailers have specific quality markers that they are expected to comply with.

Summary

Overall, this section has described the nature of craft businesses of our respondents. Since GACC's 2012 study, production appears to have increased for many respondents, suggesting growth, (though in some cases with the exception of the covid-19 pandemic which has been disruptive to some but not all craftspeople). While designs are generally a mix of traditional and contemporary styles that for most makers are regularly changed and updated, techniques tend not to change as much. People are mostly sourcing their materials in the same way as they were 5 years ago with a shift to sourcing materials online for a small number of respondents. CAD/CAM and digital fabrication are currently having very little impact on respondents but for the individuals who do use these technologies they are useful tools. Georgian craft is being bought by locals, domestic visitors and international tourists, with tourism badly affected by the pandemic this has had an adverse effect on craftspeople but partly because of a varied customer base, this has not been completely catastrophic, with some makers even indicating an increase in sales during the pandemic. We now turn to the economic situation in more detail, gauging changes to income.

Economic situation: Income

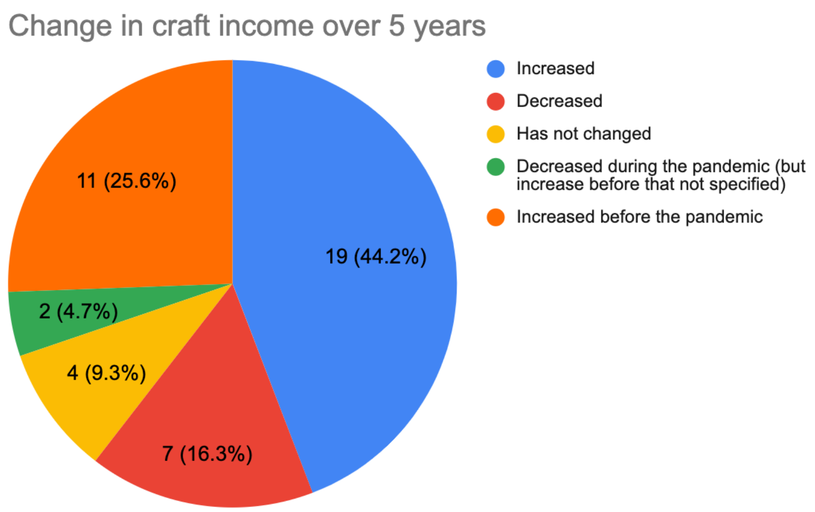
The next section covered income in order to ascertain the perception of the economic conditions within the sector. Respondents were asked about the proportion of income they made from craft practice and what they believed stimulates growth in their business. To avoid conflict or difficulty respondents were not asked to specify their actual income.

Our respondents' dependency on craft for their livelihood varied. On the one end of the scale, we have a council employee who makes craft work as a supplement to their stable income through to those who depend entirely on their craft for their income. The average percentage of current earnings from craft in relation to overall income for the respondent group is 65%. Some respondents noticed that their income from craft now makes up a smaller percentage of their income due to the pandemic, this is most frequently linked to tourism. For example, 1 maker reported that they took another job during this period, and a basket maker reported that their income was previously 100% from their craft practice, but now it is 50:50 craft and agriculture.

- 20 respondents earn 80-100% of their income from craft
- 13 respondents earn 50 - 79% of their income from craft
- 5 respondents earn 11 - 49% of their income from craft
- 2 respondents earn 10% or less from their craft
- 4 respondents do not (or no longer) earn an income from their craft, reasons given include the pandemic affecting tourism, or that they are no longer producing new works. There are some personal or health reasons for some respondents too that have no relation to the pandemic situation.
- For 2 respondents it's too changeable or rare to quantify.

Amongst those who do or have recently sold work, for 60% of respondents there has been some increase in their income, but this may have been affected by the pandemic. Only 18%

noted an overall and pandemic-related decrease. This points to a growing sector, impeded by the pandemic to a certain extent.



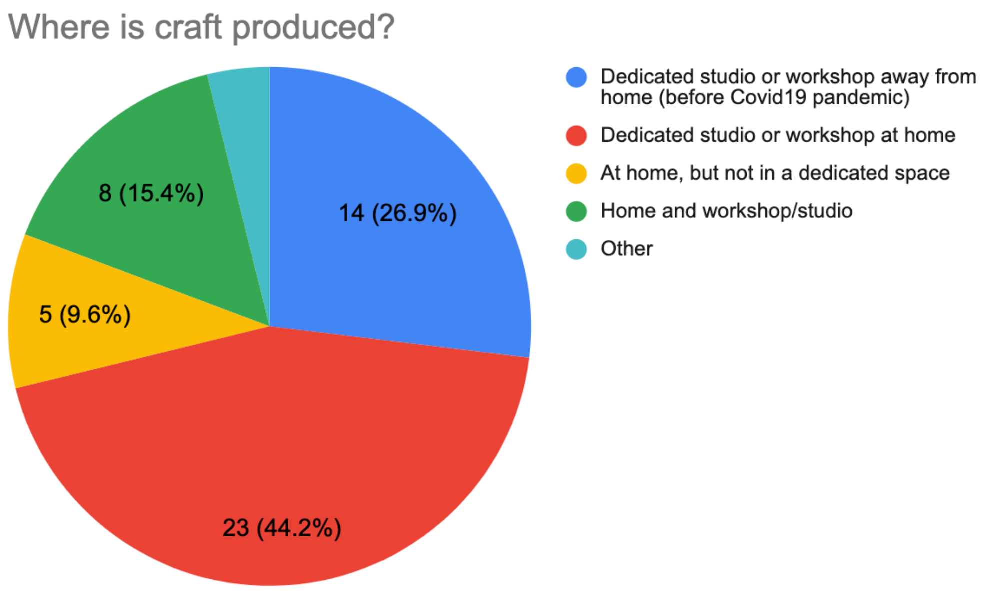
When asked what they thought would stimulate growth or be the main driver of growth in their business, 46 answered.

- 15 (30%) mentioned external factors such as demand, good market conditions, tourism returning or political stability.
- 6 mentioned financial investment.
- The remaining respondents mentioned aspects they have more control over such as improving their workshop and production facilities (7 mentions), diversifying or changing products and/or responding to the market (mentioned 6 times), marketing (mentioned 5 times), improving the technical or material quality of products (mentioned 3 times), expanding the business through taking on more students or increasing production (3 mentions).
- Individuals mentioned a better educated public, personal characteristics of energy and youth, learning a new language.
- 2 mentioned pricing: 1 mentioning competitive pricing and other higher, non-negotiable pricing.

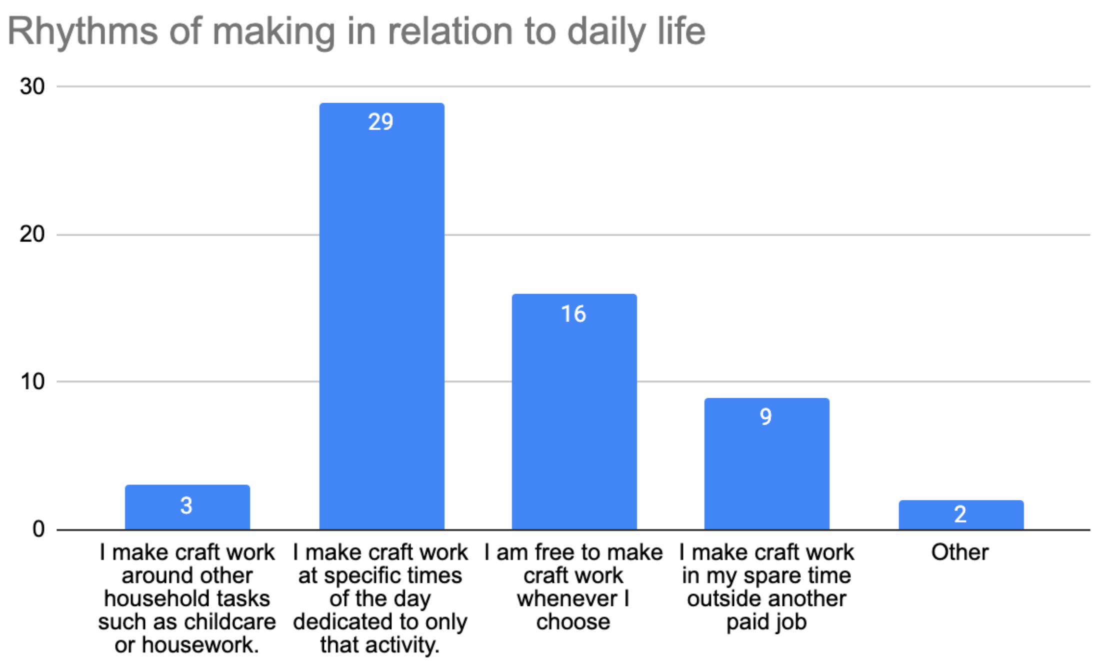
This suggests many craftspeople know what they need and have some good ideas of how to improve their businesses, but perhaps need some support to achieve this. The disparate answers suggest that more dialogue and ideas sharing between craftspeople for mutual support and development could be beneficial. The more passive answers that refer to external factors demonstrate that they are operating in challenging economic and political circumstances, but also a passive outlook. However, overall there are more active than passive attitudes to growth and these focus on both craft production itself and good business practices, suggesting that an entrepreneurial mindset is quite common.

Craft Making spaces and business arrangements

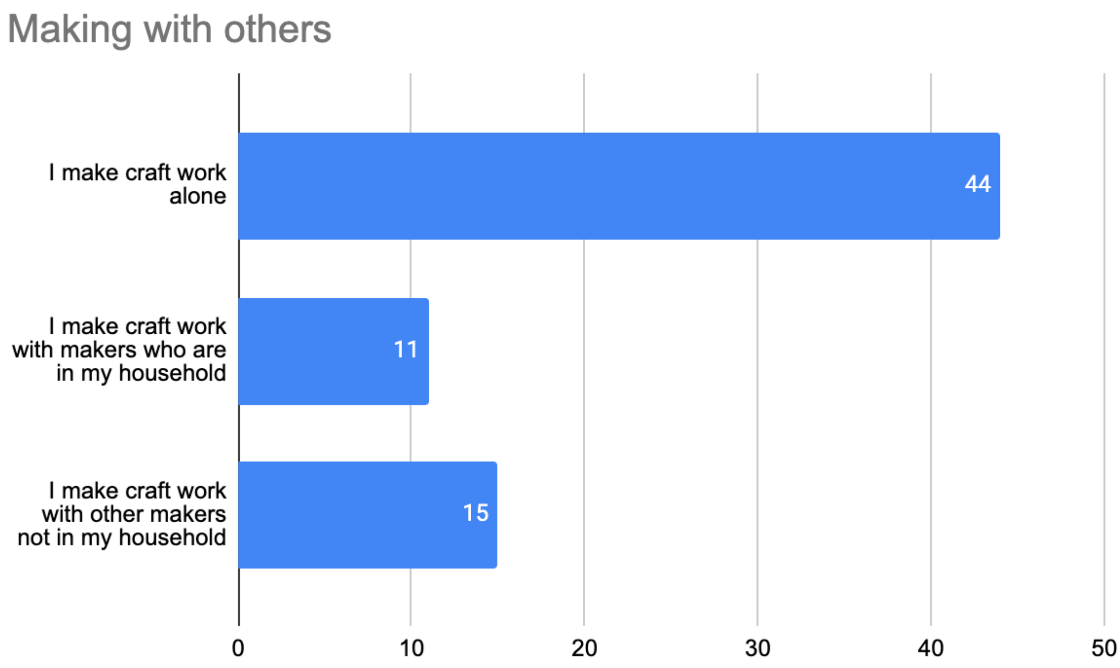
Respondents are generally making their work in dedicated spaces, more usually at home (28), but sometimes away from home (22). Very few makers are making at home without a dedicated space and this is of course related to the nature of their work, for example an embroiderer can work just about anywhere. No respondents mentioned community arts centres or other venues. This is a similar picture to the 2012 study, with perhaps slightly more people working from a workshop rather than just at home.



For almost all makers, craft production is not constrained by other tasks such as childcare or housework. 18% of respondents make their work in their spare time outside another job. Almost 60% have a structured day with dedicated time for their craft. 16 said they are free to make whenever they wish. There are clearly a range of approaches, to an extent determined by the nature of the craft practice, but it seems that craft practice tends to take a similar form to many other occupations or forms of self-employment.

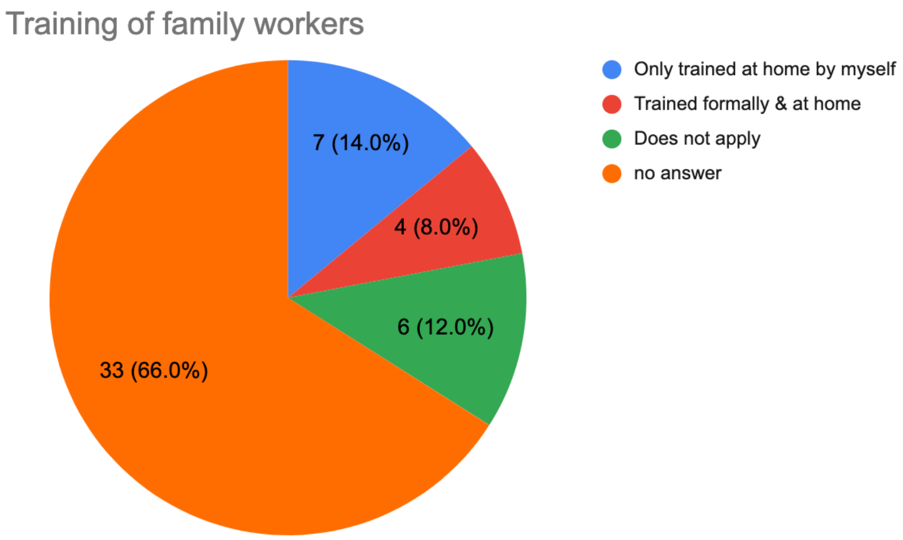


The majority of respondents work alone for at least some of the time (44). A few make with others only, including 4 who make only with those in their household and 2 who make with only those outside their household. Prevalence of individual makers is validated also by other samples. For example, a study of 64 makers conducted in 2021 for the EU funded project Crafting Europe, 39 artisans (60.9%) stated that they work alone.



Of these makers who work with or alongside others, 14 consider the people they work with to be part of their business, and 12 do not. For those makers for whom the question was appropriate, profits are generally either reinvested or shared equally, especially within family groups, a very small number mention paying others according to the work they have done. A craftsperson working with enamel told us their breakdown - 40% to the workshop, 40% to the business and 20% for marketing. A ceramicist has a daily rate and workshop fees.

For those working within family groups, we asked how those they worked with were trained; this question is relevant to a limited number of respondents. No one was only trained formally. Only 4 had formal training which indicates that informal learning is important and dominant for these types of makers. Only 9 of our respondents hire workers from outside their family group to assist or undertake craft production.



Internet Use

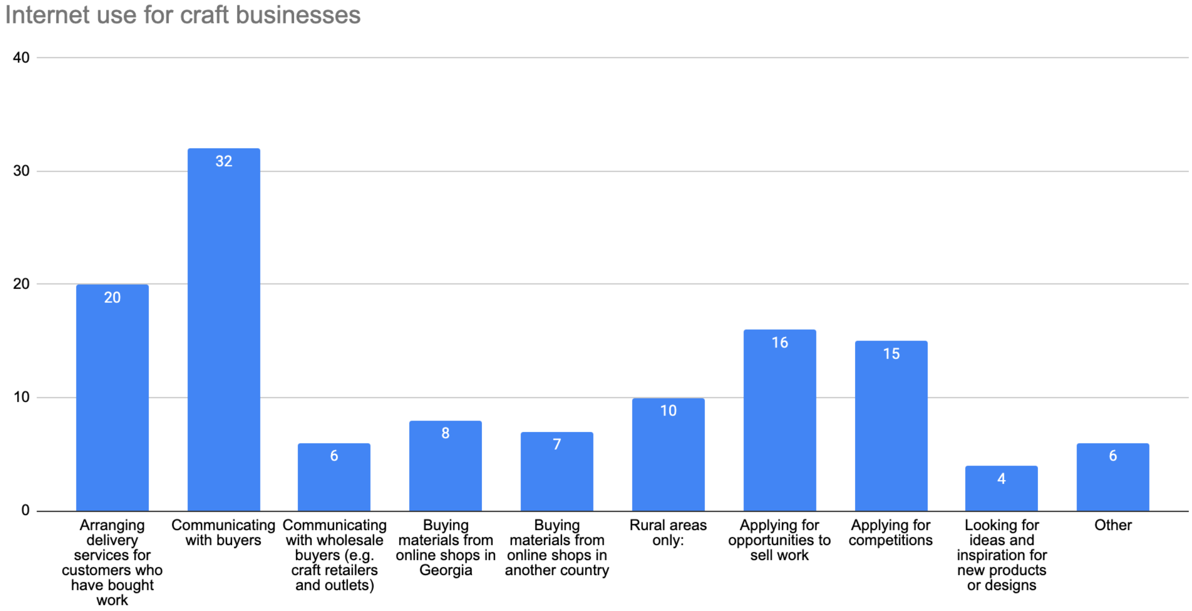
Questions on internet use gave an overview of how craftspeople are using the internet. Internet use was fairly high (80%). Older respondents are less likely to use the internet (particularly with over 60s), as one may expect. The average age of internet users was 52, while non-users was 67. A small number (4) with some internet literacy are not using the internet with their craft businesses in mind. With internet use proving vital to small businesses thriving within the pandemic globally (and as a very useful communication channel to build community and share information), it is useful data to have, to support craftspeople to become more resilient.

30 out of 50 respondents (60%) gave an email address, and 29 supplied a social media profile or similar form of online social advertising. Use of social media is quite widespread among craftspeople, although different samples return different ratios, fluctuating from 96% to 65% (data from recent GACC polls).

3 supplied website URLs or are currently building a website. This suggests fairly high levels of online communication, and the importance of the internet to marketing and communication for

many craftspeople. 10 respondents said that they do not use the internet at all, of which 2 can do so with help from children and grandchildren).

32 respondents were comfortable with 7 or 8 of the 8 basic online tasks listed. 5 can do a smaller number of the tasks. Those who were comfortable with fewer tasks were most likely to to be able to communicate regularly with others (email or social media) and browse the web, which potentially opens this group up to gaining skills in this area fairly quickly, or even of their own volition.



For those who use the internet for their craft business the most popular use is for communicating with buyers (62% of respondents use it for this purpose). Arranging deliveries is another popular use, with 20 respondents doing this via the internet. Applying for opportunities and competitions are also fairly popular. As reported elsewhere in this report, a small number are buying materials. Looking for ideas and inspiration is only used by 4 respondents, which is surprising.

A knitter and embroiderer told us that they have an Etsy account but don't use it, and that it takes a lot of time and effort to maintain an online commercial presence. Direct communication with customers is more useful than online selling from an online shop. One mentioned that their daughter manages internet related tasks, and another mentioned organising exhibitions as an online task that forms part of their craft activities.

Ethnofest Platform

The Georgian Arts and Culture Centre has been developing an online platform as part of their offer and to complement the popular annual fair and event in Tbilisi. Ethnofest offers selling opportunities, networking and professional development. Considering the important role the

GACC plays within the craft sector in Georgia, we thought it was useful to gauge how well this new online platform is becoming known. 18 (36%) were aware of it while 29 (59%) were not.

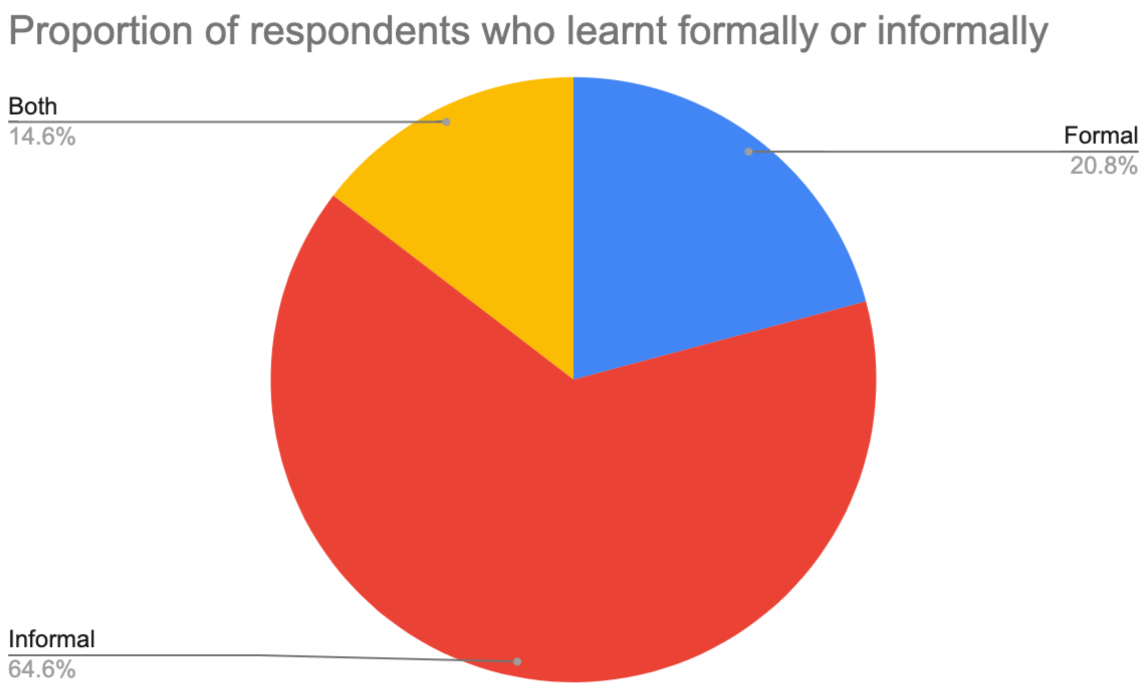
Summary

Though there is variation at an individual level, it appears that craft in Georgia is growing and that income from the craft is increasing, though held back by the pandemic. An entrepreneurial mindset of many respondents likely contributes to this growth. Craft practice is generally an individual pursuit for our respondents, who work in a direct manner with their customers, managing most aspects themselves and in control of the narrative of their work. Because of the emphasis on selling from makers' own homes and workshops, this may pose an issue for those entering the market who do not have a stable or suitable home or workshop environment. Georgians are making good use of the internet for communication, and in craft businesses this is no different and should be developed to increase resilience in uncertain times.

Teaching and Learning

Learning

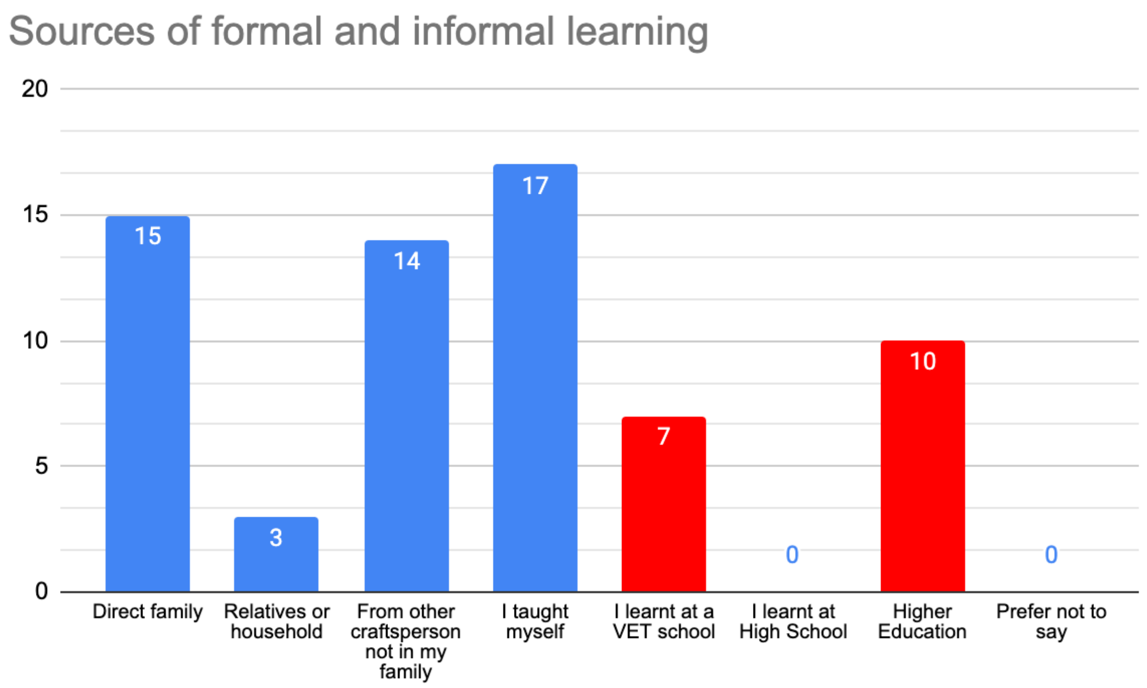
Respondents were asked about who they learnt their craft from in order to establish the nature of their involvement in intergenerational knowledge transfer.



Respondents were asked where they received their knowledge and skills in their craft. Many respondents learnt from more than one source, with self taught most frequently combined with other sources of learning. This was identified in the 2012 study, and persists (34% in this study and 32.1% in 2012). Amongst our respondents there is a higher proportion of learning from within the family group (36%) compared to the larger population surveyed in 2012 (14.2%), as well as recent study of crafts sector in Samegrelo-Zemo Svaneti region (17.65%). This discrepancy is likely because of the different selection criteria for this study, where we actively sought out those with informal education to learn more about how they operate.

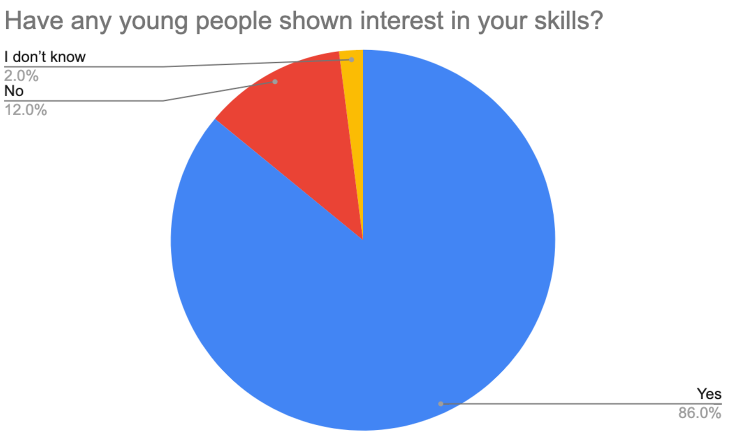
For those who learnt from within their family group, most learnt from parents and grandparents. At least two respondents indicated that most or all of the family knew their craft. Formally educated craftspeople did not in general get help from their family, with only one respondent saying their parents helped them with their formal craft studies. Informal learning outside the family group included, for example, neighbours or a local crafts person.

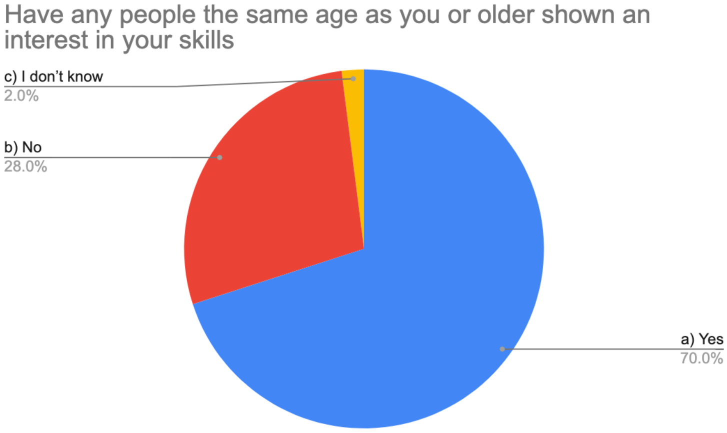
While the study specifically sought out informally trained craftspeople, and those engaged in teaching others, the formal education system clearly plays a strong and important role in maintaining and passing on craft skills in Georgia, with VET schools and higher education, the most prevalent sources of formal craft education.



Teaching

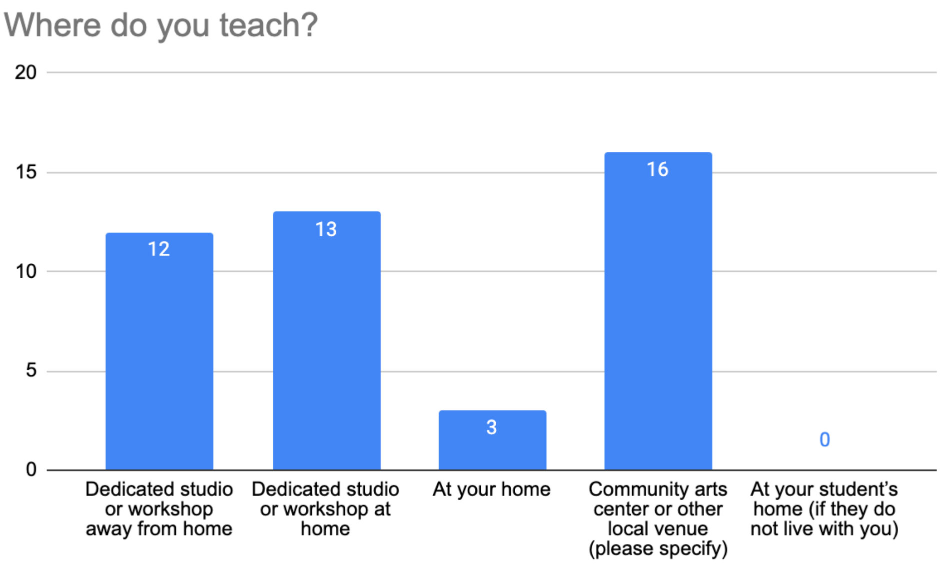
Questions were then asked about their involvement in teaching and who has shown interest in their craft as the future of craft practice lies in passing on skills, as well as favourable market conditions. 43 out of 50 respondents said that young people have shown an interest in their skills and 35 respondents said that those the same age or older have shown an interest. This gives a sense that people, and in particular young people, are interested in craft skills, which suggests potential for future teaching, and potentially, the sustainability of the sector.





44 out of 50 respondents indicated that they are currently teaching their craft in some capacity (this includes two who are about to start, one who had 5 students but they decided not to continue and one respondent who ordinarily teaches, but had stopped temporarily due to the pandemic. Only 3 were not teaching, and the remaining respondents chose not to answer. One older master in his eighties noted that previously masters were only able to teach their children, though there is no sense that this continues to be the case.

30 respondents said they have taught in the past, with 19 saying they have not. 1 did not respond. Positive responses included one person teaching at the Academy in Tbilisi and one teaching within the framework of funded projects, in this case mostly teaching people with 'special needs'. One mentioned that their students are not 'official' but that they are always teaching several people. The respondents therefore represent a wide range of teaching experiences, and possibilities for learning craft skills.

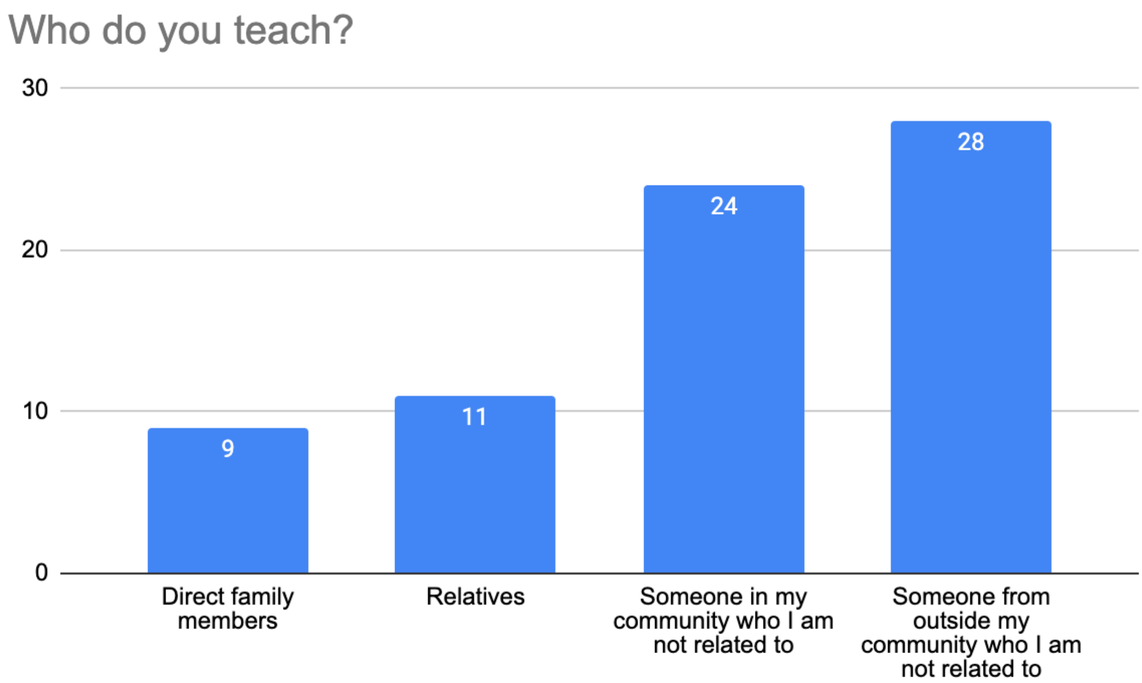


Locations for teaching are varied, with an even spread across dedicated craft spaces, if we count the home and home studio together. One mentioned teaching a Sunday School, and one mentioned that they teach tourists and American school students at their home.

Respondents commented on the frequency of their teaching. 7 respondents teach daily (or on weekdays), 15 teach 2 - 4 times per week, and one teaching weekly. 6 teach infrequently or without a regular schedule.

The relationship between respondents and those who they teach varies, with fewer family members and relatives compared to those the respondents were not related to (see chart). There is no discernible pattern between frequency of teaching and relationship to student.

The majority of students are younger than the respondents with ‘Most of them’ being the most frequent response (15) followed by ‘All of them’ (11) and 4 described younger students as ‘a lot of them’. For 3 respondents, half are younger. One mentioned a low percentage (20%).



The number of students being taught by our respondents at the time they were surveyed varies significantly as some are not teaching anyone and some work in organisations or institutions where they are teaching larger groups on a regular basis. See the table below for the numbers of respondents teaching different numbers of students. A fine metalsmith described their teaching as helping students at a community arts centre, but not teaching them officially. A felt maker is currently teaching two Georgian students online, who are in Italy. A leatherworker described teaching two people who are also currently coworkers. A few mentioned currently having no students due to the pandemic. Those with larger numbers of students are generally teaching within institutions, whether these are universities, VET colleges or more informal community learning.

Number of students currently taught (at time of survey) versus frequency of occurrence

No of Students	1-5 (as individuals or small groups)	6-10	10-20	20-50
Frequency (number of respondents who teach this number of students)	12	5	5	4

Approximately 244 students in total were being taught by our respondents at the time they were surveyed. A lot of the active teaching was on hold due to the pandemic, so this number is likely more accurate for immediately before the pandemic. Without the pandemic this number is much likely considerably higher as some people are engaged in teaching tourists too who are not included in these numbers.

Our 50 respondents have collectively exposed thousands of students to craft practices in the past, estimated at over 10 500[2]. The majority of these are more formal classes and within institutions, though this could range from a once off experience to a university programme. A minimum of 300 of these students are now engaged in selling their work, though this number is likely higher as many were unable to articulate a precise number. 3 respondents did not know how many went on to sell their work.

A proportion of past and present students are making craft to sell or for pleasure/hobbies. This is estimated at 277, but likely to be much higher as 13 were unable to give us a more specific answer than ‘a lot’ and 9 did not know. Of course continuation without commercial intent is more common with textile crafts, compared to metalwork or ceramics where more specific and costly equipment such as kilns and furnaces are needed.

The teaching and learning picture amongst respondents includes a considerable number of self-taught craftspeople. The majority of respondents are informally trained, most have gone on to teach others formally or informally. The studio/workshop or home studio are important sites of teaching. The formal education sector remains extremely important. There is significant interest in the craft of our respondents from young people, whose interest can be encouraged and facilitated in both formal and informal settings. Our respondents are more likely to pass their skills on to someone outside of their family group, but there is still a significant tradition of passing crafts skills on within families that has great potential for further research and investigation.

[2] This number may seem inflated, but reflects total teaching at all levels over the lifetimes of respondents including a small number of respondents who have individually taught hundreds, or in 1 case thousands in different contexts.

Attitudes to craft and environmental sustainability

9 questions were included that addressed environmental sustainability. This is because it is both an important global concern, but appears to be a particular concern of many craftspeople in both their outlook and in how they communicate the narrative of their work. This may also provide an area for future development in education, marketing and personal satisfaction for craftspeople in Georgia.

Although the greening of the economy is on the agenda of different state bodies in Georgia, wider society as well as most business entities still do not accept responsibility for greening their practices. According to ecological efficiency, Georgia was in 94th place out of 194 in 2008 (Aslanishvili, D., & Omadze, K. 2019). In this regard, the Craft sector is not an exception.

All 50 respondents agreed that environmental sustainability was important to them personally, with one responding that craft is feeding the environment. When asked about how they practise their craft in an environmentally sustainable way, many respondents were unable to answer, with 35 not answering at all, this could be because they do not separate their practice from other personal concerns, or that the vocabulary or thinking is not yet linked explicitly for them. Those who did answer mostly referred to using natural materials, and natural dyes or for reusing materials or waste (e.g. paper). Some mentioned avoiding pollution and being careful about waste. There is a sense from these responses of an intuitive understanding of the sustainability of craft practices and an awareness of making a minimal impact on the landscape they inhabit. One respondent summarised this, saying that taking care of the environment is important overall, and makers try not to damage the environment with their work, through the use of eco-friendly materials or dyes.

A similar picture was revealed in another GACC poll. 80% of participants in the GACC's online poll conducted within the project, Crafting Europe, said that concepts such as sustainability, 'kilometre zero' and the circular economy are important for the crafts sector, but skills demand studied within the ETF project showed no importance of green skills for future employees from the companies surveyed.

Our respondents responded readily to more specific questions. Most respondents named their materials as natural (48). 43 respondents indicated they used local materials and 10 indicated that they do this where possible. 4 noted they do so when it is affordable, but only one noted that they use locally sourced materials if it does not make their product more expensive.

Regarding energy efficiency only 6 respondents are not trying to reduce energy consumption; only 7 are explicitly. Of those 7, two linked reducing energy use directly to making processes. For those who are actively reducing or minimising their energy use, this may be related to the cost of energy rather than a desire to reduce their carbon footprint. For 34 respondents this ‘does not apply’, 2 preferred not to say. This does not indicate that energy consumption is not a concern, but rather that most labour involved in these crafts practices by the craftspeople themselves does not require energy intensive processes. However, no one mentioned material extraction, or the energy cost of materials before they reach the craftsperson, the potential impact of imported materials, or other factors relating to production, such as energy use in metal working. Craftspeople, as in many places, are primarily concerned with their own part of the making process and its impact. Their scale of production is of course much smaller than industrialised production and cannot really be compared.

Regarding the narrative that makers use in how they sell their work and tell its story, environmental sustainability is the ‘main narrative’ for 22 respondents. For 21 other makers, it is ‘part of their story’ and for 4 makers they do not mention it to their customers. Only 8 makers pass on the increased cost of pursuing a more environmentally friendly process, with 3 relating this to the increased cost of materials and 5 indicating that they do so because it is a better quality product. The remaining respondents are almost evenly split between not charging more (19) or only making environmentally friendly products (20). Only 1 respondent said no when asked if an environmentally friendly marketing narrative in packaging or other forms of marketing increase sales. 24 said yes, 17 said they didn’t know and 2 preferred not to say. This suggests that environmental narratives have a significant role to play in the marketing of craft goods.

20 makers said that there is no specific group to whom environmentally friendly products appeal. For 21, all their products are environmentally friendly. For 5, a specific group prefers to buy environmentally friendly craft, with two mentioning international tourists specifically.

Environmental sustainability is important personally to makers in Georgia, and a significant number use it as part of the narrative they tell to their customers. There is scope for more complex conversations with makers, who are likely working in a sustainable way, but could build on this in relation to supply chain transparency, understanding carbon footprint, and emotional durability which are becoming increasingly powerful and important parts of marketing for craftspeople globally. Combining cultural and environmental sustainability presents many opportunities for Georgian craftspeople to encourage patronage.

Perceptions of the Sector

In order to gauge general perceptions of the craft sector by craftspeople, respondents were asked to agree or disagree with a series of statements.

35 of 50 respondents agreed that the market for craft in Georgia is growing. The same perception was revealed in other recent studies (ETF project, Crafting Europe project poll) shows that most representatives of the craft sector, in particular 30 out of 50 in one case and 12 out of 21 in another, feel that the craft market has increased during the past 5 years.

37 respondents agreed that ‘Craft is prestigious’.

Only 4 agreed that ‘Craft is old-fashioned’ and only 7 agreed that it is unusual for young people to be involved in craft professionally. Only 2 agreed that there are no places to sell craft. 5 agreed that ‘Craft is not relevant to my daily life’. This suggests that the majority of respondents see craft as an appealing prospect with a good future.

However, 16 agreed that they can’t earn a good living from craft and just fewer than half agree that ‘craft is a good option for a career’, suggesting that there is a sense of precariousness. 13 said ‘it is too difficult to find supplies’, suggesting that this is a hurdle for a significant minority.

Further comments included one respondent who thought Georgian craftspeople needed to be more responsive and individual in their production. One noted that it deserves more respect than it has now. Another spoke about the long history of Georgian craft and its authenticity, and distinctive identity as well as its continuing relevance for contemporary practitioners.

While the perception of the sector is not overwhelmingly positive, it suggests a strong, resilient and active community of makers.

Recommendations

Craft & business practices

We have learnt that our respondents have mostly increased earnings and production over the last 5 years, however the covid-19 pandemic has had a significant impact on many craftspeople, affecting this positive trajectory quite severely in some cases. We therefore recommend that development and educational initiatives aimed at increasing the resilience of small craft businesses are developed. Building on existing internet literacy where it already exists and encouraging intergenerational knowledge sharing from young people to their older relatives and other masters could really help to develop skills sharing and trust as well as intergenerational learning.

There is already an agile, creative and entrepreneurial mindset in many of the respondents. Mentorship and peer learning are opportunities that could help the community. Those from the informal sector (many of our respondents) could offer some of their skill and knowledge to the formal craft education sector with appropriate facilitation. From our respondents, the home studio/workshop or individual workshop outside of the home are important not only to making but to selling work. Consequently, some help and support for those wanting to enter the sector in the form of shared workshop spaces, or opportunities to work in other people's workshops could help more young people to get into craft as a career. Workshop facilities were mentioned in the GACC 2012 report and remain important.

Teaching and learning

We have learnt that there is a considerable number of Georgian craftspeople who are self-taught. There is scope to do further research to understand how this happens. The majority of respondents are informally trained, most have gone on to teach others formally or informally. The studio/workshop or home studio are important sites of teaching. The formal education sector remains extremely important, but is certainly not the only way people are becoming craftspeople. There is significant interest in the craft of our respondents from young people, whose interest can be encouraged and facilitated in both formal and informal settings. Our respondents are more likely to pass their skills on to someone outside of their family group, but there is still a significant tradition of passing crafts skills on within families that has great potential for further research and investigation.

We therefore recommend that the Creative Learning Module developed as part of the Crafting Futures programme for use in the VET formal sector, is offered as an elective or additional semi-formal for professional craftspeople too. It may provide a suitable framework for arts and cultural centres, or individual craftspeople to teach in formal settings and to provide some approaches they may find interesting and enjoyable. Based on imagination and creativity, it will help to encourage creative problem solving which is essential to maintaining resilience and passion in extremely difficult times such as those we have seen in 2020 and 2021. Its' emphasis on reflective learning may also help informally educated craftspeople and their students to develop a reflective practice.

It would be immensely valuable to support interested informal teachers to develop their teaching practice through mentoring, or training, where the needs and expectations of the craftspeople come from them directly. It would also be very valuable to students in formal education to have opportunities to learn from informally educated craftspeople, both about their work, but also their approach to their craft business.

Intergenerational learning for older craftspeople could be used to support internet use and connectivity as this seems to be an important and growing area in the sector, which could help some of the less popular crafts find willing enthusiasts, students and collectors. All interventions need to take heed of the different (slower) pace and structure of informal learning to avoid unreasonable expectations of progress.

Sustainability

We have learnt that environmental sustainability and notions of being environmentally friendly are important Georgian makers, though they may not always know or understand how to articulate this in the narrative around their work.

We therefore recommend that there is a good opportunity to arrange some training or workshops about environmentally friendly and regenerative narratives for craftspeople. This could help them to better understand the potential of their own products to form part of this important issue and increase knowledge and terminology that is being used within the global craft community. This would need to carefully avoid 'greenwashing' or promoting an overly simplistic attitude to what constitutes environmental and cultural sustainability. However, it does present a real opportunity for craftspeople to engage meaningfully with an issue that is instinctively important to them and important to their audience.

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