BHUTAN HAND-WOVEN TEXTILE INDUSTRY

Survey Report 2022

BHUTAN HAND-WOVEN TEXTILE INDUSTRY

Survey Report 2022

BHUTAN HAND-WOVEN TEXTILE INDUSTRY

Survey Report 2022

Printed at Kuensel Corporation Ltd.
Layout and Design by Thinley Zangmo
ISBN: 978-99980-979-1-9

Prepared by
Karma Yeshey
Phurba Dorji
Institute of Management Studies Ltd., Thimphu

With
Joseph Lo (Ph.D)
Center for Folklife and Cultural Heritage, Smithsonian Institution, Washington D.C.

Photographs from RTA's archives
Royal Textile Academy, PO Box No. 1551, Thimphu Bhutan
Tel: +975 2 336460, +975 2 337589
www.rtabhutan.org

དཔལ་ལྡན་འབྲུག་གཞུང་། ལྷན་རྒྱས་གཞུང་ཚོགས་ཡིག་ཚང་།

OFFICE OF THE CABINET AFFAIRS
ROYAL GOVERNMENT OF BHUTAN

CABINET SECRETARY

November 24, 2022

FOREWORD

The first Bhutan Weaver Survey was conducted in 2010 by the National Statistical Bureau and the Department of Culture, Ministry of Home and Cultural Affairs. This survey report - Bhutan Hand-Woven Textile Industry Survey 2022 – is a continuation of this initiative so as to comprehend the evolution of Bhutan's hand-woven textile practice in terms of drawing trends and forecasting challenges based on empirical data. This survey exercise, undertaken by the Royal Textile Academy of Bhutan (RTA) was carried out in partnership with the Centerfor Folklife and Cultural Heritage (CFCH) of the Smithsonian Institution and funded by theWilliam H. Geiger Family Foundation Inc, USA. Significantly, it establishes RTA as a credible leader and authority in the textile and design sector in the country. Congratulations!

The findings from the survey prove interesting and intriguing. While it celebrates the continuation, vitality and resilience of the hand-woven textile sector in Bhutan, it also serves as an alarm-bell to highlight some precarious trends. More importantly, the sophistication of the analysis enables the reader to relate its findings to the changing contexts of Bhutan. A case in point is the declining number of young weavers. Yet, this is not because of the simplistic view of disinterest among youths but rather the success of Bhutan's education system. Furthermore, the analysis of this report draws from other survey reports, such as the Youth Attitudinal Survey on Bhutanese Weaving, Designing, and Textile Culture 2022 to provide a holistic, robust and vigorous evaluation; youth are not only proud of their textile heritage and cultural identify but they are indeed interested to embark on careers that involve weaving and designing.

Hence, having such empirical information on hand, the question is how will policy makers, industry stakeholders, organizations involved in the development of Bhutanese hand-woven textiles, designers, practitioners, etc. respond creatively, credibly and confidently to the challenges facing this sector, while also rejoicing its successes.

Tashi Delek!

Dasho Kesang Deki

TABLE OF CONTENTS

ABBREVIATIONS

APIC	: Agency for Promotion of Indigenous Crafts
BIMSTEC	: Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation
BLSS	: Bhutan Living Standard Survey
BTS	: Bhutan Trade Statistics
CBI	: Culturally Based Industries
CBS & GNH	: Centre for Bhutan Studies & Gross National Happiness
CFCH	: Centre for Folk Life and Cultural Heritage
GER	: Gross Enrolment Rate
GNH	: Gross National Happiness
GPI	: Gender Parity Index
IMSL	: Institute of Management Studies Limited
INR	: Indian Rupees
LFS	: Labour Force Survey
MoE	: Ministry of education
MoEA	: Ministry of Economic Affairs
MoF	: Ministry of Finance
MoHCA	: Ministry of Home and Cultural Affairs
MoLHR	: Ministry of Labour and Human Resources
NC2,3	: National Certificate 2, 3
NER	: Net Enrolment Rate
NSB	: National Statistical Bureau
NU	: Ngultrum
PAR	: Poverty Analysis Report
PHCB	: Population and Housing Census of Bhutan
RGoB	: Royal Government of Bhutan
RTA	: Royal Textile Academy
SAARC	: South Asian Association of Regional Cooperation
SPSS	: Statistical Package for the Social Science
TCB	: Tourism Council of Bhutan
TVET	: Technical and Vocational Education and Training
US$	: United States Dollar
WB	: World Bank
YDF	: Youth Development Fund

EXECUTIVE SUMMARY

With the aim to preserve, promote, educate and create awareness in the textile and design sector in Bhutan, the Royal Textile Academy (RTA), in partnership with the Centre for Folklife and Cultural Heritage (CFCH) of the Smithsonian Institution, funded by the William H. Geiger Family Foundation Inc, USA, conducted this nation-wide survey on Bhutan Hand-woven Textile Industry 2021.

Objective of the Survey

The overall objective of the survey was to:

- Obtain a profound understanding of the Bhutanese hand-woven textile sector for the purposes of forecasting and serving as a guide to establish programmes that are relevant to the industry and the overall development in Bhutan.

Overview of Survey Methodology and Participation

The sample size for the Bhutan Textile Industry Survey 2021, as provided by the RTA, was 6,000. Employing 'Representative sampling', the sample was distributed across three major regions – Central, Eastern and Western Bhutan – and Thimphu Dzongkhag, based on population density.

The approach taken for this survey included three phases in the following manner –

- **Pre-field Phase** –Literature review, questionnaire development, enumerators training, and pilot testing questionnaire
- **Field Phase** –Survey; and
- **Post-field Phase** – Data entry, data analysis and report writing

For accuracy and efficiency, the data collected was processed using Statistical Package for the Social Science (SPSS) software. The edited and processed data were further analysed using Microsoft excel.

There were 6,077 respondents of which 99.3% were female and 0.7% were male. In terms of the age group distribution, about 80% of the respondents were within the age range of less than 25 to 45 years, highest being 26-35 years (>35%), followed by 36-45 years (<30%) and less than 25 years (>10%). While slightly over 15% constituted 46-55 years, 56 years and above represented less than 5%.
Similarly, by educational background, over 60% of the respondents were without any formal education, followed by those with secondary level education (>15%), higher secondary (<10%), primary (<10%), and university degree (<5%) college (<2%); vocational diploma and postgraduate degree constituted less than 2%.

While the respondents were from all 20 dzongkhags, over 15% were from Chukha, followed by Wangdue (>10%); Paro (10%); Samtse, Trashigang and Thimphu (<10%); and Punakha and Monggar (>5%). Respondents from the remaining dzongkhags ranged from less than 1% to about 5%. 55% of the respondents were from the western region, followed by the <30% from the eastern region; and the central' region and Thimphu dzongkhag along with Thimphu Thromde (<10%).

Key Findings

1. Bhutanese engaged in textile production are mainly focused in weaving and very few in other specialised areas such as yarn production and processing, dyeing and others.
2. Karchang Gho and Kira (simple weave) seem to be the most woven by Bhutanese weavers as compared to Hor Gho and Jamsam Kira, with Shinglochem Gho and Dhidhim Kira being the least frequently woven.
3. Frequency of production of other types of traditional textiles (Rachu, Kera, Kheb, etc.) and contemporary textiles/fabric in Bhutan is very low.
4. Where weaving happens, it is likely that slightly over 50% of the households or families may derive less than 25% of their household income from weaving.
5. About 85% of the weavers in Bhutan weave for their own consumption.
6. Slightly over 50% of the weavers may generally spend about 2-4 hours a day weaving and over 30% may spend about 4-6 hours a day weaving.
7. Karchang Gho and Kira may generally take the shortest time to weave, with over 60% of weavers taking 3 days to a week to complete and another 25% taking about 2 weeks. Intrinsic patterns like Kushuthara and Shinglochem Gho can take the longest time to weave with about 55% of weavers completing within a month's time, another over 25% taking about 3 months, another over 10% taking about 6 months.
8. About 55% of the weavers may finance from their own savings, about 20% from the sale of textile products, another about 15% with support from family and friends, and another about 5% financed by clients through provision of materials.
9. Overall, the traditional Bhutanese fibre types – cotton, sheep wool, yak wool, and nettle – do not appear to be in common use as raw materials for making Bhutanese weaves. Rather, imported fibre types appear to be in more common use for the Bhutanese weaves.
10. Satisfaction level with the quality of traditional Bhutanese fibre types is very low, which is commensurate to their use. In stark contrast, satisfaction level with the quality of imported fibre types is very high.
11. Traditional Bhutanese fibre types are generally viewed as expensive. In sharp contrast, imported fibre types are considered reasonable in cost.
12. Bhutanese weavers are more agreeable to the 'cost-quality relationship' for the 'imported fibre types' than for the 'traditional Bhutanese fibre types'.
13. Generally, accessibility to traditional Bhutanese fibre types is considered difficult, whereas imported fibre types are easily accessible.
14. Over 20% of the Bhutanese weavers may know the final selling price of their textiles, most of whom may be doing the calculation themselves.
15. Generally, there seems to be a good satisfaction level among weavers with the selling price of their textiles. However, there is a feeling among weavers that the cost of production is apparently higher than the selling price.
16. Most weaving in Bhutan seems to take place at home, indicating weaving in Bhutan is more of a 'home' or 'local' affair with less weaving taking place during April – October months for various reasons.

17. The decision as to what and how much to weave seem to be largely made by the weavers themselves, which may be based on choices by clients, past experience, market trends, other producers, advice from family and friends, etc.
18. Advertisement and promotion of their textile products are largely done by themselves as they sell their products, through family and friends, word of mouth, and also through building a reputation of making good textile products. Social media is used minimally.
19. Most of the purchasers of textile products are Bhutanese.
20. About 80% of the weavers' main customers are from the same geographical region – same Dzongkhag, same region, same Gewog.
21. Non-Bhutanese purchasers (almost at the ratio of 3 International: 1 SAARC countries) of the Bhutanese textile products are small. Other traditional textiles, contemporary scarves and shawls, and soft furnishings seem quite popular among non-Bhutanese customers.
22. With over 65% of the weavers' frequent customers based in their own localities – same Gewog, dzongkhag and region – over 65% of their textile products are sold at home and in the local market directly by weavers themselves as well as delivery of those 'made-to-order'.
23. Weavers have certain challenges in selling their textile products, some of which are –access to market, cost factors of their products, manpower issues, issue of oversupply vis-à-vis low price, lack of transportation, etc. However, those whose products have better demand and whose products are made for targeted markets seem to face no challenges in selling their products.
24. Karchang seems to be the best-selling textile product in the market, while Kushuthara seems the worst-selling product.
25. Annually about 40% of the people may purchase textile products ranging from 6-11 pieces, followed by about 30% who may purchase 1 – 5 pieces, over 20% may purchase 11 – 15 pieces, and over 10% may purchase more than 15 pieces.
26. Weavers may face challenges in paying their suppliers, workers or creditors owing to lack of cash in hand (<40%), lack of access to financial resources (<20%), lack of credit facilities (<15%), and problems in sales turnover or cash flow and sales with poor profit (around 10% each). However, those with cash at hand or with easy access to cash or savings, with good sales and profit, receiving prompt payments from customers, etc. have fewer difficulties.
27. Weavers may face difficulties in collecting payments from customers owing to when customers are short of cash (>50%), payments are not in cash (>30%), difficulties in collecting payments from family and friends, and difficulties in locating middlemen for payments. Conversely, weavers have less challenge when customers pay in cash, when terms of payment are only in cash, when payments are immediate or favourable payment terms, and when middlemen are trustworthy and punctual in making payments.
28. While about 40% of the weavers may use their income/profit generated on household expenses, others may save it for education, plough back into weaving, invest into other areas, etc. Majority of the decisions on usage of the income generated may be made by weavers themselves, and to a certain extent, by their spouses, and in some cases by parents and siblings. Most weavers may be happy with the decision-making process on the usage of income generated.
29. While about 30% of the textile products may be sold in far off places, over 30% of the sellers may have some challenges in delivering their products owing to lack of transport and high cost of transportation, including labour charges.

30. While some weavers may pack their products for delivery, a large proportion may do it sometimes, another similar proportion may not do it at all. Packing currently is done in plastic bags or cloth pieces or in carton boxes. There are challenges in packing attributed to the high cost of packing materials, lack of packing materials, lack of experience, etc.
31. Sources of learning weaving skills seem generally a family matter. The weaving skills may be largely handed down from their parents and learned from other family members. Weavers are found to have learnt weaving at all age levels (below 12 years, 13-20 and 21 -30), majority being between the age of 13-20.
32. Most weavers may pass on their weaving skills to others for various reasons, including for tradition, culture and economic reasons. The perceived responsibility to pass on weaving skills seems widespread, from 'anyone who is interested' to 'family', 'friends' and 'community'.
33. While weavers may generally be interested in improving their overall skills, most may want to hone their skills in textile designing and technical skills in various areas including in traditional textile weave design, natural dyeing techniques, fibre knowledge and yarn spinning and plying. Interest in improving their business and general skills is also reasonably high.
34. While weavers may prefer both frequent short-term (within a week) and mid-term (within a month) training, they prefer the trainings to be conducted in their locality as compared to centralized training locations. Their preference for long-term training is much less.
35. Most weavers may like their weaving skills to be certified for a range of reasons.
36. In terms of the training cost, while about 10% may find charging a fee for the training reasonable, only slightly over 25% may actually contribute to the training cost.
37. While about 35% of the weavers are either good or excellent in spoken Dzongkha, their reading and writing skills are much lower. Their proficiency in English is even lower. Their proficiency in numeracy may be slightly better than the English language.
38. While the number of weavers creating their own textile design is currently very low, most weavers would be interested in doing so.
39. While about half the weavers may find weaving interesting, rewarding, and/or enjoyable most of the time, the rest may find it difficult most of the time.
40. Most of the weavers may be either happy or very happy. However, there may be a small group who may be unhappy or very unhappy.

key Recommendations

Hand-Woven Textile Sector as a Formal Textile Industry

1. Organise the hand-woven textile sector as a formal textile industry.
2. Institutionalise the textile production system.
3. Encourage creativity and innovation in the hand-woven textile industry.
4. Establish quality control and supply chain linkages.
5. Ensure the availability of easily accessible, affordable, quality Bhutanese fibre types.

Education and Skills of Weavers

6. Formalise transmission of knowledge, design and weaving skills to ensure sustainability.
7. Enhance education and skills of weavers focusing mainly on textile designing and technical skills and to a certain extent on business skills.
8. Determine levels of training programmes, duration and certification.
9. Engage and expand the roles and scope of the current institutions/centres as well as encourage other players to join the sector.
10. Introduce weaving programmes in schools.

Survey Questionnaire Design

11. Treat the hand-woven textile sector as a separate economic activity in the *Labour Force Surveys* (LFS).
12. Develop Standard Occupational Codes and Standard Industrial Classification for hand-woven textile workers.
13. 'Clothing' must be a separate item in the *Bhutan Living Standard Surveys* (BLSS).
14. Data collection designs must be maintained as three regions – central, eastern and eastern (with Thimphu Dzongkhag), and Thimphu Thromde.
15. Ensure that the data collection is in terms of respondents'permanent as well as current address.
16. Define annual family income based on analysis of Bhutan poverty and living standards, as well as GNH surveys.
17. Provide details on the traditional origins of textiles, i.e., community-based geographically produced textiles.
18. Determine production frequency of contemporary textiles/fabrics by combining current survey Q. Nos. 23 and 24.
19. Future surveys could base questions on the 2010 survey (MoHCA& NSB, 2013) for determining household income from weaving.
20. Future GNH surveys could incorporate a component on weaving to determine the level of cohesion within weaving families' vis-à-vis non-weaving families.
21. Future surveys could combine Q.Nos.34 to 37 to a single question to arrive at quantifiable responses for determining the time taken to weave textile products.
22. Reformulate Q. No.112 in future surveys to determine changes in the value of textile products in a given period.
23. Future surveys could factor the cost of raw materials to determine whether the cost of yarns has increased, decreased, or remained the same during a given period.

24. Q. No.119 for future surveys could provide a list of possible ways of promoting themselves including the use of digital or virtual modes.
25. Future surveys to include the place of sale of textiles to non-Bhutanese customers, including capturing the nationalities of the non-Bhutanese customers.
26. Review and reformulate Q.No.173 for future surveys for determining usage of income or profit generated.
27. Future surveys to question types of packaging materials weavers use for delivery, and labelling and branding their products.
28. Future surveys to include reasons why weavers may not be willing to pay for training.
29. Future surveys to include aspects of community participation to determine community cohesiveness through weavers' perspectives.
30. Conduct longitudinal studies involving a few weavers under 25 years of age.

1
BACKGROUND AND OBJECTIVES

1.1 Aim

As one of the means to sustain weaving practices and expressions in Bhutan, the Royal Textile Academy (RTA) conducted this nation-wide Bhutan Hand-Woven Textile Industry Survey 2021 to understand the potentials and challenges of the industry and to identify where interventions may be necessary. This was carried out in partnership with the Centre for Folklife and Cultural Heritage (CFCH) of the Smithsonian Institution and funded by the William H. Geiger Family Foundation Inc, USA.

1.2 Objective

The objective of this survey is to:

- Obtain a profound understanding of the textile sector for the purposes of serving as a guide to establish programmes and meaningful interventions that are relevant to the industry and the overall development in Bhutan.

1.3 Background: Literature Review

The tradition of weaving in Bhutan is relatively well documented, some of which are *Traditional Bhutanese Textiles* by Barbara S. Adams (1984), *Thunder Dragon Textiles from Bhutan* by Mark Bartholomew (1985), *From the Land of the Thunder Dragon – Textile Arts of Bhutan* by Diana K Meyers and Susan S. Bean (Editors, 1994), The Thirteen Traditional Crafts by Barry Ison in *Bhutan (check correct title of book) – Mountain Fortress of the Gods* (1997), Traditional Arts by Sonam Yangchen and Jigme Choden in *Intangible Culture of Bhutan* (2015), Bhutanese Art of Textile Weaving – Druk Thagzo by APIC in *Arts and Crafts of Bhutan* (2017 – 1st Edition, 2020 – 2nd Edition), Art of Textile by Khenpo PhuntshoTashi in *Arts and Culture of Bhutan* (2019), etc.

Much as weaving has been an integral part of the Bhutanese culture, the first ever baseline report on 'textiles' under 'craft-based manufacture' was included as part of the *Bhutan Cultural Industries Sector Development –A Baseline Report 2009*, which in itself was as a consequence of the First BIMSTEC Summit in Bangkok, Thailand (July 2004), followed by the Paro Initiative (2006). The report provided more of narratives on 'distinctive patterns of Bhutanese textiles', 'being prized for their natural vegetable colours', 'weaving largely home-based as supplementary income/economic activity', 'expensive or prized especially commissioned textiles', 'back strap looms', 'competition from Indian manufacturers', 'lack of and therefore on the importance of comprehensive data', etc.

The Baseline Report, among others, expressed the urgent need for a comprehensive research for both the supply and demand of hand-woven textiles to provide an in-depth analysis of the situation to guide the development and growth in the sector.

Apparently, since the Baseline Report was more concerned with comprehensive coverage of the overall cultural industries, the information on sub-sectors such as the handloom understandably relied on existing statistical surveys and data sources. Such information although sufficient to establish baseline data for the sector, lacked accurate information, for instance, on the number and location of weavers, and quantities of hand-woven textiles produced or sold for the purposes of supply chain and market analysis, as well as for the introduction of quality standards, skills standards, product development, sales, and organisational support that may enhance the competitiveness of the sector. Hence, the *Bhutanese Weaver Survey 2010* was carried out to provide such information.

The *Bhutanese Weaver Survey 2010,* among others, made the following two pertinent observations, that:

1) Weaving was predominantly practised as a very individual and isolated activity, with production characterised by a high level of fragmentation and almost non-existent organisation and coupled with the lack of easy access to various resources, including funds for development and inconsistent monetary returns, made the potential for growth in weaving very limited.
2) In spite of challenges in (1) above, weaving generated about 15% of the wages and salaries received by the weavers, which contributed about 40% of household cash income, indicating that the sector had significant economic potential under the right conditions.

The above-cited survey report pointed out that in order to realise the potential of the handloom sector in Bhutan and thereby support the development of weaving as a thriving cultural industry, it was important to overcome the challenges of fragmentation of activities, and recommended to –

1) Overcome the lack of specialisation in relation to various processes involved,
2) Allow weavers easier access to resources and to the market,
3) Impart higher levels of business skills and knowledge of the market requirements among weavers, and
4) Transform weaving from artistic occupations to a craft-based manufacture framework, addressed from different perspectives.

Further, as did by the Baseline Report 2009, it also pointed out that in order to fully understand the complexities and value-chains involved in the commercialisation of weaving activities, a more comprehensive study related to the supply and demand of hand-woven textiles should be in order. It also underscored the fact that the development of the hand-woven textile sector in Bhutan came with a competitive edge as local skills were readily available, and that weaving was perhaps the most extensive and equitably distributed capital in the country.

In addition, periodical and regular survey and statistics reports such as the '*Labour Force Survey*', '*Bhutan Living Standards Survey*', and '*Bhutan Trade Statistics*' provide critical data on textiles and allied aspects in Bhutan.

In the *Labour Force Surveys* (LFS), 'weaving of home-based textiles' along with 'cane and wood products' is clubbed under 'Manufacturing' as 'Major Economic Activity'. Considering LFS for the three consecutive reporting years, i.e., 2018, 2019 and 2020, there is an increasing trend of employment under 'manufacturing', which could perhaps also include 'textiles', 'cane' & 'wood products' in the increasing employment trend. (NSB 2018, 2019, 2020). However, 'textiles' being treated under the major 'manufacturing' economic activity, there is no way of finding out the share of 'textiles' under 'manufacturing' sector.

While LFS thus far has not used any 'occupational codes' to identify various occupations, for some reason, tables of '*International Standard Classification of Occupational Codes*' (ISCO-08) and '*International Standard Industrial Classification of Industry*' (ISIC-Rev4) were used as references as part of the 'Survey Instruments'. (NSB 2018, 2019 & 2020; pp.5)

Bhutan Trade Statistics (BTS), an annual publication of the Ministry of Finance (MoF), Royal Government of Bhutan (RGoB), among numerous others, provides trade details for 'textile and textiles articles'. Table 1 shows the value of import and export of 'textiles and textile articles' for three 5-year period intervals, i.e., BTS for 2005, 2010 and 2015, and annually for 2016 – 2020. Except nominally for one or two years, import of 'textile and textile articles' has been increasing from Nu.172.3 million in 2005 to Nu.1.3 billion in 2020. However, the export of the same 'textile and textile articles' has not kept pace with the growth in 'import'. The best 'textiles and textile articles' export year has been 2005 with an export value of Nu.787.13 million (nearly 100% by 'Man-made filaments'), and the worst ever was in 2018 with a dismal export value of Nu.0.524 million. This situation seems to contradict with MoEA's (2011) claims as under:

> *"… CBIs are net importers. However, the partial CBIs export almost their entire output (about 99%) and account for 98% of the total exports of all CBIs. Within this category, the weaving and handmade paper industries are the largest net exporters and consequently the biggest net foreign exchange earners among all CBIs." (pp.10)*

Perhaps, much of the 'textiles and textile articles' produced in Bhutan are largely traded in the domestic market. Part of the answer may be in the *Bhutan Living Standard Survey* (BLSS) reports.

In the *Bhutan Living Standard Survey* (NSB 2003, 2007, 2012 & 2017), 'clothing and footwear' is one of the items under 'Non-Food Consumption Expenditure' category. 'Clothing and footwear' as percentage of non-food consumption expenditure in Bhutan ranged from 9 – 15% from 2003 to 2017 with a slightly lower range for 'Urban' (10 – 15%) and a slightly larger range for 'Rural' (8 – 15%) as compared to 'Urban'. (NSB 2003, 2007, 2012 & 2017). Of these, about 80 – 85% of the 'clothing and footwear' may be 'purchased' and another 10 – 20% of the 'clothing and footwear' consumed may be 'home-produced', with a similar consumption expenditure pattern for 'Urban' and 'Rural' areas (Urban: 80 – 100% 'purchase' and 0 – 20% 'home-produced'; Rural: 75 – 85% 'purchase' and 10 – 20% 'home produced') (NSB BLSS 2003, 2007, 2012 & 2017). It may also be noted that anywhere from 0 to about 12% may also be 'gifted'.

Table 1: Value of Textile Import and Export by Bhutan Trade Statistics Years

BTS Year	Value of Import (Nu)	Major contributor to Import	Value of Export (Nu)	Major contributor to Export
2005	172,296,289	Over 40% by 'cotton' (Nu.68.4m) (Annex II; pp.3/5)	787,128,170	Nearly 100% by 'Man-made filaments' (Nu.784.4m). (Annexure V, pp.2 of 3)
2010	304,575,712	Almost 55% by 'cotton' (87.1m) & 'Other made-up textile articles; sets; worn clothing & textile articles; rags' (79.6m) (pp.4)	41,444,341	Largely by 'Man-made filaments; strip and the like of man-made textile materials,' (Nu.20.8m) & 'Man-made staple fibres (18.1m) (pp.167)
2015	876,842,513	Almost 75% by 'cotton' (244.4m), 'Other made-up textile articles; sets; worn clothing & textile articles; rags' (166.8m), 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (132.6m), and 'Silk' (Nu.107m) (pp.4)	15,491,321	About 90% by 'Man-made filaments; strip and the like of man-made textile materials' (Nu.9.8m), 'Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery' (Nu.2.9m), & 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.1.0m) (pp.168)
2016	869,550,908	Almost 75% by 'cotton' (Nu.219.8m), 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.179.5m), 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (Nu.166.1m), and 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.95.6m) (pp.4)	4,008,756	Over 90% by 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.1.2m), 'Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery' (Nu.1.0m), 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.0.758m), & 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (Nu.0.690m) (pp.167)
2017	935,596,060	Almost 75% by 'cotton' (Nu.206.7m), 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (Nu.171.7m), 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.164.0m), and 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.117.8m) (pp.4)	4,377,265	Almost 100% by 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.1.8m), 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.1.0m), 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (Nu.0.859m), & 'Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery' (Nu.0.646m),), (pp.163/4)

BTS Year	Value of Import (Nu)	Major contributor to Import	Value of Export (Nu)	Major contributor to Export
2018	959,646,627	About 70% by 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.208.7m), 'cotton' (Nu.174.1m), 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (Nu.140.3m), and 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.126.8m) (pp.4)	523,573	About 90% by 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.0.462m), (pp.163/4)
2019	883,148,476	Over 65% by 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.203.7m), 'cotton' (Nu.140.2m), 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (Nu.130.3m), and 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.105.9m) (pp.4)	3,281,480	Over 65% by 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.2.2m) (pp.161)
2020	1,300,437,045	Over 80% by 'Other made-up textile articles; sets; worn clothing and worn textile articles; rags' (Nu.333.8m), 'Articles of apparel and clothing accessories, not knitted or crocheted goods' (Nu.198.6m), 'Articles of apparel and clothing accessories, knitted or crocheted goods' (Nu.197.6m) 'cotton' (Nu.127.9m), 'Man-made staple fibres' (Nu.105.7m), and 'Silk' (Nu.101.0m). (pp.4)	1,917,301	No ONE Category stands out in the export for the year. (pp.159-160)

[Source: BTS 2005, 2010, 2015, 2016 – 2020, MoF, RGoB]

In 2014, a visitor exit survey was carried out involving international and regional visitors (TCB, 2014). The survey reported that international "… visitors were attracted to Bhutan by cultural and nature-based activities, adventure/sports and other attractions like textiles, community-based activities, wellness and spa, and retreat/meditation" (p.29-30), with similar attractions being reported by regional visitors. (p.43) The average out-of-pocket spending by international 'tariff paying' and 'non-tariff paying' visitors on ‘souvenirs and shopping’ were US$ 305.17 and US$ 220.29 respectively, non-tariff paying visitors comparatively spent much lower (p.30-31). The average out-of-pocket spending by the regional visitors on ‘souvenirs and handicrafts’ were reportedly INR 6,254.76 (about US$95), accounting for 24.4% of the total out-of-pocket spending (p.45-46). However, it cannot be determined as to the share of ‘hand-woven’ textiles within the ‘souvenirs and handicrafts’ shopping.

Further, the Tourism Council of Bhutan carried out the *Tourism Establishment Census of Bhutan 2021,* as operational in 2019, covering themes such as accommodation; food, beverage and entertainment; transport, tour operators/ travel agencies and reservation agencies; health and wellness; and other tourism activities, within which ‘handicrafts ‘was included. Of the total revenue of Nu.23,337.5million generated from the tourism sector, Nu.251.18million was reportedly generated by ‘other tourism activities’, of which Nu.165.27million represented a share of the ‘handicrafts’. (p.58) Of course, there is no way of knowing whether the definition of ‘handicrafts’ (p.13) includes ‘hand-woven’ textiles, and even if it did, there is no way of determining the share of ‘hand-woven’ textiles within ‘handicrafts’.

Finally, two hand-woven textile survey reports by the Royal Textile Academy (2022), namely, (1) *Bhutan Youth Attitudinal Survey on Weaving, Bhutanese Weaving Culture and Designing 2021* and (2) *National Purchase and Consumption of Textile Survey 2021,* are notable.

The *Bhutan Youth Attitudinal Survey on Weaving, Bhutanese Weaving Culture and Designing2021* (RTA, 2022), among others, found that:

1. Youths were not equally familiar with the diversity of Bhutanese textiles and identification of various motifs, as well as with traditional items used for dyeing. Their level of technical knowledge of the named Bhutanese textile weaves as well as their familiarity with various looms used in textile weaving was pretty low.
2. While parents have played very important roles in imparting knowledge and training to their children to weave Bhutanese traditional textiles, educational or training institutions/centres have not played any role or have taken a very little role in training youths in traditional weaving.
3. There was generally a good interest in Bhutanese traditional weaving and designs and a good proportion of youths would be interested in learning designing and weaving if available in schools and educational institutes. Comparatively more youths were interested in design than in weaving, clearly indicating demand for creative and innovative products and services.
4. Bhutanese youths took pride in wearing the national dress, with a strong preference for the Gho and Kira woven in Bhutan, except that they were generally seen as unaffordable. There was also a general consensus among youth that weaving traditions must be preserved.
5. While comparatively more youths were interested in taking up designing than weaving as form of gainful employment, consideration for availability of support in formal weaving skills and training on designing, accessing raw materials and design resources, access to financial assistance, marketing and promotion, entrepreneurial skills development, establishing networks and linkages, etc. were very important.

The study, among others, made the following pertinent recommendation, to:

1. Professionalise the traditional Bhutanese weaving and weaving industry as a thriving sector within creative cultural industry.
2. Institutionalise the production system and develop industry clusters for its enhancement.
3. Encourage creativity and innovation in the traditional Bhutanese textile sector.
4. Establish a Bhutan national institute of textiles/fashion technology as a legal entity offering various levels and nature of programmes, including continuing education programmes.
5. Put in place strategies and protocols for providing support to youth to start businesses in weaving and/or designing, including financial assistance, access to raw materials and resources, assistance in marketing and promotion, including branding, etc.
6. Introduce weaving programmes in schools and institutes, including through incorporation into relevant academic subjects and their lessons.

Similarly, the *National Textile Purchase and Consumption Survey 2021* (RTA, 2022), among others, found that:

1. By and large, Gho/Kira woven on back-strap looms are of superior quality, followed by those woven on Meche looms, with machine woven being generally of average quality.
2. Gho/Kira woven on back-strap looms, generally of superior quality, are also expensive, followed by those woven on Meche looms. Machine-woven Gho/Kira being of average quality are also reasonably priced in the market.
3. The likely future purchases for machine woven Gho/Kira and woven on Meche loom are significantly higher than for those woven on a back-strap loom.

The study, among others, made the following recommendations, to:

1. Develop the Bhutanese hand-woven textile industry as a bespoke industry for aspirational products.
2. Develop Meche loom textiles in ways to offer what back-strap loom textiles cannot, rather than copying back-strap loom textiles.
3. Increase the value of hand-woven textiles, rather than suppress demand for machine-woven textiles.
4. Make the hand-woven textiles attractive for customers with high disposable income.
5. Attract young adults through the creation of conspicuous textile products.
6. Establish a process/mechanism of Quality and Authenticity Certification.

2
STUDY METHODOLOGY

2.1 Study Design and Questionnaire

The questionnaire was developed in collaboration with Royal Textile Academy (RTA), Dr.Joseph Lo, a consultant from CFCH, and Institute for Management Studies Limited (IMSL). The structure of the questionnaire was adopted from the *Bhutanese Weaver Survey 2010* (MoHCA & NSB, 2013). Prior to finalising questionnaires, a thorough review of a variety of existing sources (for example, documents, reports, data files, and other written artefacts, etc.) with the intention of collecting independently verifiable data and information was carried out. The questionnaires developed were pre-tested by choosing some pilot participants (within Thimphu) and necessary changes were made based on the findings prior to its deployment in the field.

The research designs used in this study were 'exploratory research' and 'descriptive research' as provided hereunder:

Exploratory Research: The study used an exploratory research design to ascertain the initial thought process of the research. This involved an extensive review of literature, consulting experts and peers. The exploration helped in finalising research problems and a fair idea of finalising the objectives of the research.

Descriptive Research: The study used a descriptive research design and applied descriptive data analysis using cross tabulation, etc. The variables in focus for this study are gender, age and education. The study also looked at the spatial effect keeping rural-urban distribution in mind.

2.2 Sampling

The universe of the study is composed of weavers and those engaged in allied weaving activities. The sample size for the Bhutan Hand Woven Textiles Survey is 6,000 which was derived based on a total population of 394,027 ranging from 25 years and above (PHCB2017, p.98) at a 95% confidence level and 1.26 Confidence Interval.

For the purpose of this study, the geography of the country was divided into three major regions – Central, Western, Eastern Bhutan – and Thimphu dzongkhag.

2.3 Data collection process

- Snowballing technique was used to reach out to respondents as it ensured a high response rate. One referral led to another and since the next respondent would know the earlier personally, it ensured many conveniences including the time spared by the respondents. This led to enhanced accuracy of data. In most cases, a personal visit method was used wherein the questionnaire was filled by the enumerator.
- IMSL with the support of colleagues from the RTA Bhutan led the study. Four teams comprising of six enumerators in the east, five enumerators in the west, four enumerators in the central and five enumerators in Thimphu dzongkhag were deployed. Each team had a team leader who administered the survey questionnaires. The enumerators were selected based on their familiarity with the geographic locations and fluency in local dialects.

- The enumerators were given a day-long training on the use of survey questionnaires, field procedures and interview protocols. The enumerators were also briefed on getting consent from the respondents and maintaining their confidentiality. Upon completion of the training and before deployment of the enumerators to the field, a pre-testing of the survey tools and methods was carried out in Thimphu. The questionnaire was perfected on smart phones. However, wherever there was network hitches, paper surveys were employed.
- A multi-layered structure of supervision was organised during the fieldwork. Four regional supervisors led the teams in the field, i.e., for Eastern, Central, and Western regions and Thimphu dzongkhag. Each of them was responsible for monitoring the progress and ensuring the data quality before pushing data to a central server. Additionally, officials from IMSL carried out independent random on-site checks. The four supervisors reported directly to the central coordinator who checked the quality of the data on a real-time basis.
- A majority of the one-on-one survey interview was conducted which was guided by a questionnaire displayed on the phone screens. However, paper surveys were also conducted in places where networks were poor and smart phone interviews could not be administered. The questionnaires were printed in bulk prior to leaving for the field trip. The enumerators had to fill in the questionnaire set by hand. Correspondingly respondents' answers which are routed/gathered by enumerators were administered by the consultants. All intended numbers of completed interviews with specific groups and sub-groups were met.
- Apart from the above two methods, data were also gathered through video calls. This method of data collection was implemented especially for the regions where frequent travel restrictions and lockdowns were imposed due to the outbreak of Covid-19. The enumerators were also trained on the use of video calls. The participants were selected based on a random probability formula. Some were identified through recommendations provided by participants themselves.
- The research team provided RTA with the raw data (SPSS) files with the codified entries of surveyed responses.

2.4 Analysis of the survey data

The data were processed using Statistical Package for the Social Science (SPSS) software which is commonly used as a social statistical tool for its accuracy and efficiency. The software is commonly used for interactive statistical analysis. The edited and processed data were further analysed using Microsoft excel. The data analysis is done in collaboration with officials from the Royal Textile Academy (RTA), Smithsonian Consultant, and Institute for Management Studies Limited.

2.5 Work Approach

Phase	(Key Activity) What will we do?	Process (How will we do?)	Output	Initial Deadline	Revised Timeline
Pre-field phase	Literature review	Review of documents and reports to obtain a fundamental understanding of the hand-woven textile sector and to enhance the analysis of the study	Information compiled for use in the report		
	Development and finalisation of questionnaire	Consultative meetings with RTA	Questionnaires finalised	November 30, 2020	
	Training of enumerators & piloting survey tool	• Familiarisation with the survey tool	Enumerators trained and survey tools piloted.	December 1 -3, 2020	
Field Phase	Survey and gathering of data	• One-on-one survey tool administration • Data collection via google link	Survey completed and tools ready for data entry	December 7, 2020 to January 7, 2021	
Post-field phase	Training data cleaners	Orientation of data punchers on the survey tool and the interface	Data punchers trained and ready for data entry		
	Data entry and cleaning	• Data entry by individual punchers • Data analysts run through all the entries and cross check for inconsistencies such as typing errors, empty fields, etc. and correct it through coded verification	Data entry and cleaning completed and data ready for analysis	January 8 – 17, 2021	
	Data analysis	Cross tabulations, generation of frequency tables and tables in percentage/mean	Data analysis completed		
	Report Writing	Report written by the Lead consultant	Draft report submitted to RTA	January 25, 2021	
	Presentation of findings	PPT presentations to RTA	Presentation completed and comments recorded for document refinement		
	Refinement of the report	The report refined/finalized based on agreed comments	Final report submitted	February 1, 2021	

However, due to COVID-19 pandemic situation which resulted in frequent nationwide lockdowns, area based lockdown and travel restrictions that were imposed, the timeline that was planned could not be followed. The outbreak of Covid-19 on 5th March 2020 came as a crucial blow to the smooth conduct of the survey. Schools were closed, strict travel restrictions were imposed and gatherings and meetings were curtailed. This hampered the due process of the study in finalising the questionnaires and in sampling size. Just as the enumerators kick-started with the surveys in the regions and in Thimphu, it suffered another blow with the nationwide lockdown that came into effect on December 19, 2020. The enumerators, who were already in the field had to immediately stop with the survey and were stranded till the lockdown was lifted. The successive lockdowns imposed by the government also disrupted the smooth conduct of the study and therefore, various alterations and modifications had to be made in the timeline.

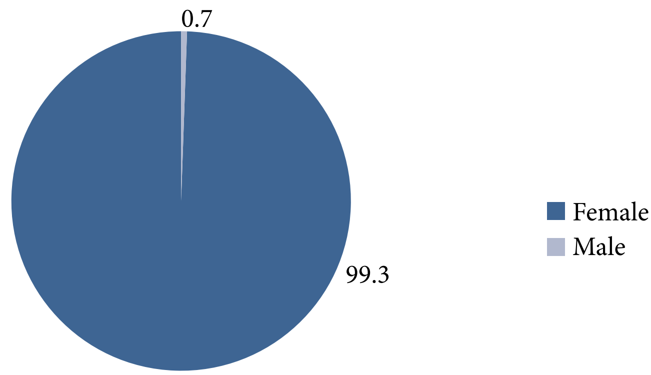
3
SURVEY FINDINGS

6,077 weavers and those engaged in allied weaving activities from across three regions of the country, i.e., Central, Eastern, and Western and Thimphu dzongkhag participated in the survey.

3.1 General Profile

i) Gender

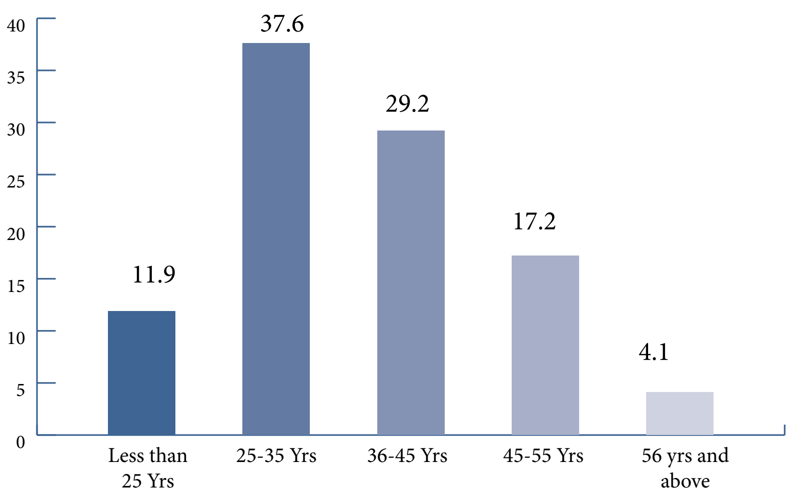
Figure 1 : Respondents by gender (%) (N=6,077)



99.3% (or 6,033) of the total 6,077 respondents were female and 0.7% (or 44) were male respondents (Fig 1). Refer Appendix B1.1 for details.

ii) Age range

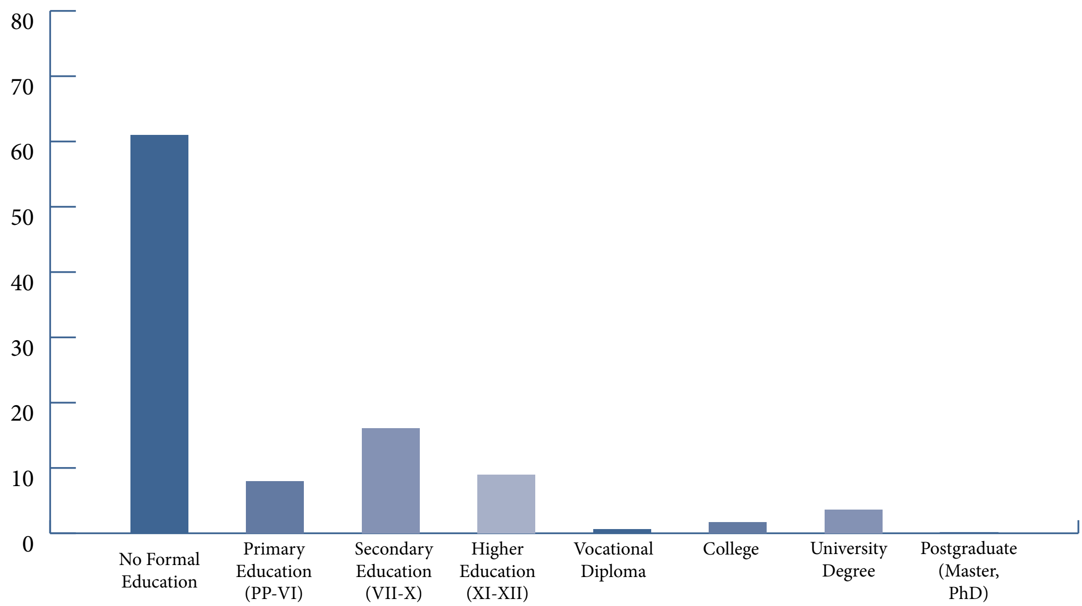
Figure 2 : Respondents by age (%) (N=6,077)



Of the total respondents, 37.6% (or 2,285) respondents were within the age range of 26-35 years, followed by 36-45 years (29.2% or 1,775). While lowest participants were in the 56 years and above range, the lowest at 4.1% (or 249), 17.2% (or 1,045) were within the age range of 46-55 years. 11.9% (or 723) were within the age range less than 25 years. (Fig 2). Refer Appendix B1.2 for details.

iii) Educational background

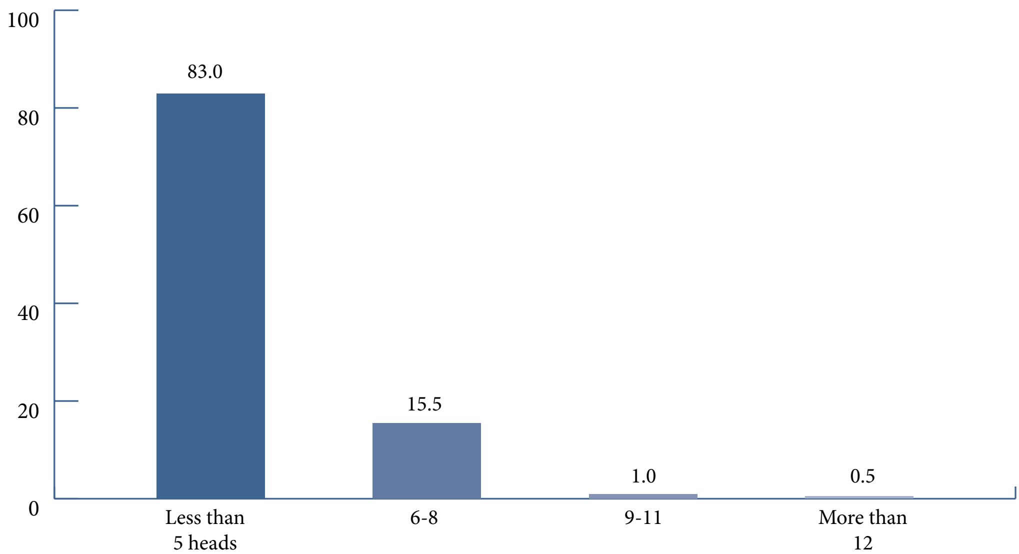
Figure 3 : Respondents by educational qualification (%) (N=6,077)



In terms of educational background, 61.0% (or 3,706) of the respondents were without any formal education, followed by education levels with secondary (16.1% or 977), higher secondary (9.0% or 544), primary (8.0% or 484), university degree (3.6% or 218), and college (1.7% or 106). Respondents with vocational diploma and postgraduate degree constituted 0.6% (or 38) and 0.1% (or 4) respectively. (Fig 3) Refer Appendix B1.3 for details.

iv) Number of persons in the household

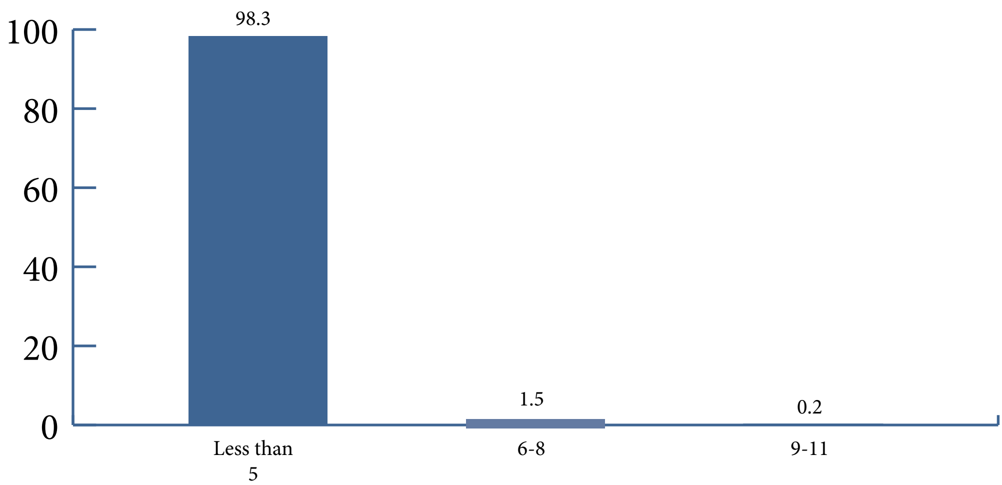
Figure 4 : Respondents by persons in household (%) (N=6,077)



Of the total, 83% (or 5,046) of the respondents had less than five persons in the household, followed by 6-8 persons (15.5% or 943). While 1.0% (or 59) had 9-11 persons in the household, 0.5% (or 29) respondents had more than 12 persons in the household. (Fig 4) Refer Appendix B1.4 for details.

v) Number of children under 18 years in the household

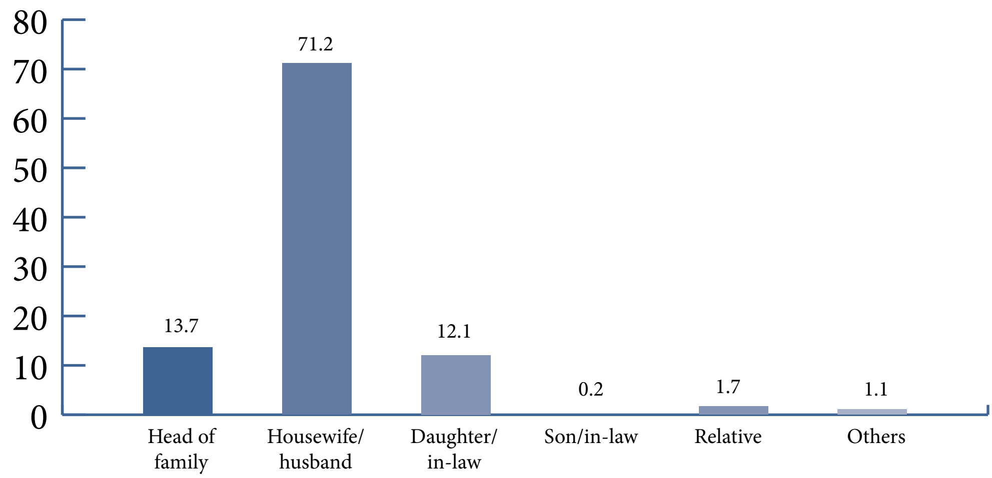
Figure 4 : Respondents by persons in household (%) (N=6,077)



Overwhelming majority of the respondents (98.3% or 5,974) reported having less than 5 children under 18 years. While 1.5% (or 90) reported having 6-8 children under 18 years, 0.2% (or 13) reported having 9-11 children under 18 years. (Fig 5) Refer Appendix B1.5 for details.

vi) Interviewee's position in the family

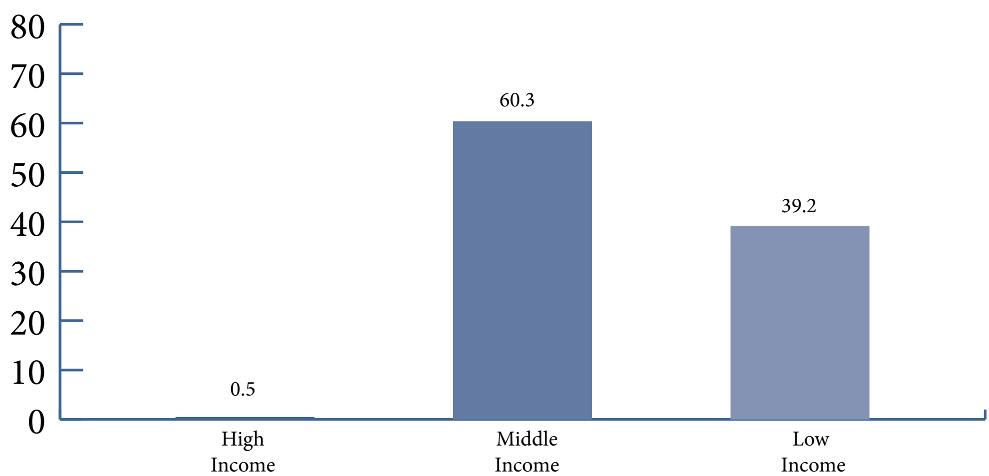
Figure 6 : Respondents by position in the family (%) (N=6,077)



While 13.7% (or 830) of the respondents were head of the family, 71.2% (or 4,327) were house wife/ husband, followed by daughter/daughter-in-law (12.1% or 735), relatives (1.7% or 103), others (1.1% or 69), and son/son-in-law (0.2% or 13). (Fig 6) Refer Appendix B1.6 for details.

vii) Annual family income

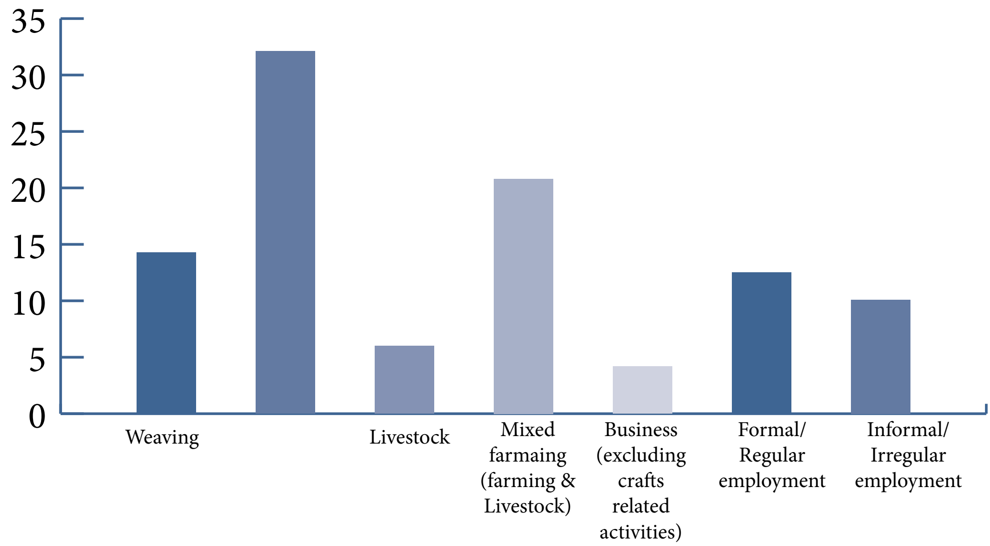
Figure 7 : Respondents bymain family income activity (%) (N=6,077)



In terms of the annual income, 60.3% (or 3,664) of the respondents are in the middle income group and 39.2% (or 2,382) in the low income group. Only 0.5% (or 31) reported having 'high income' (Fig 7). Refer Appendix B1.7 for details.

viii) Family income activity

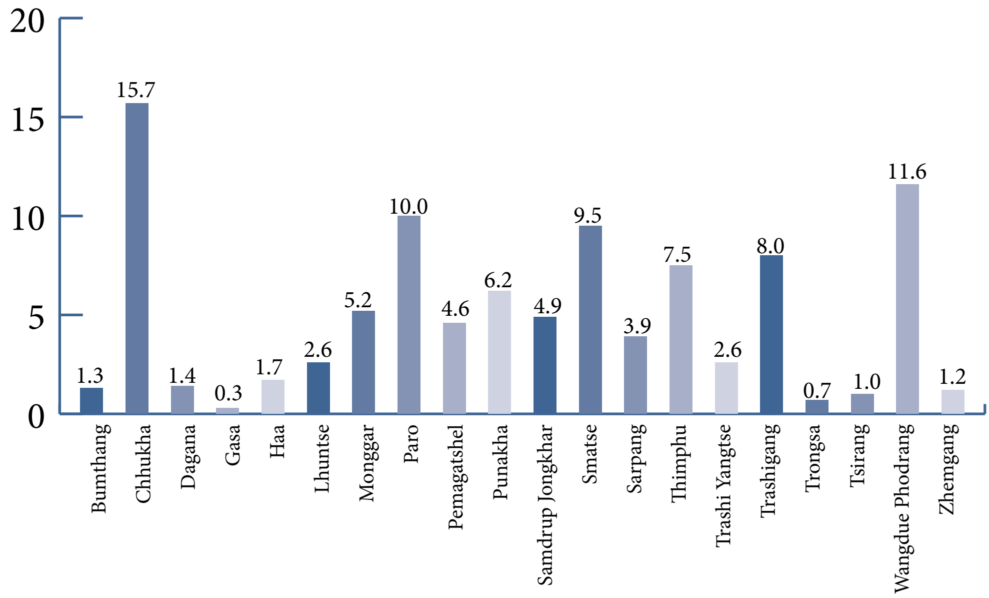
Figure 8 : Respondents by main family income activity (%) (N=6,077)



As to the main family income activities, 32.1% or 1,952 of the respondents reported farming as their main activity, followed by mix farming (20.8% or 1,264), weaving (14.3% or 868), formal or regular employment (12.5% or 760), and informal/irregular employment (10.1% or 614). The least income activities are from business (4.2% or 255), followed by livestock (6.0% or 364) etc. (Fig 8). Refer Appendix B1.8 for details.

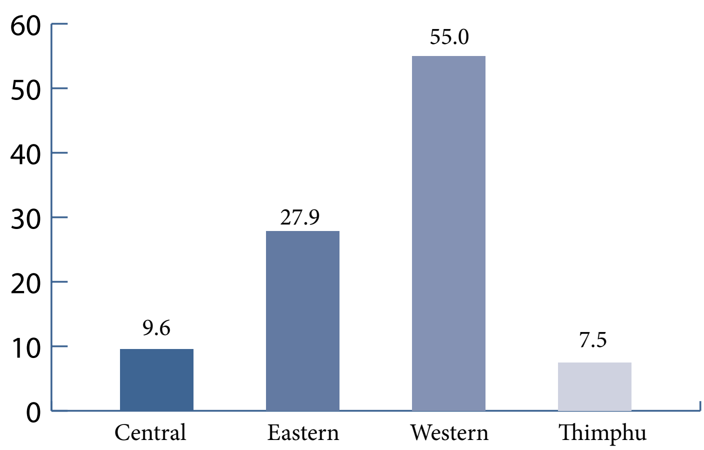
ix) Participation by Dzongkhags and Regions

Figure 9a : Respondents by Dzongkhag (%) (N=6,077)



While the respondents were from all 20 dzongkhags, 15.7% (or 954) of the respondents were from Chukha, followed by Wangdue (11.6% or 703), Paro (10.0% or 609), Samtse (9.5% or 579), Trashigang (8.0% or 488), Thimphu (7.5% or 454), Punakha (6.2% or 378) and Monggar (5.2% or 314) dzongkhags. Respondents from 12 remaining dzongkhags ranged from less than one percent to 4.9%. (Fig 9a) Refer Appendix B1.9 for details.

Figure 9b : Respondents by regions (%) (N=6,077)



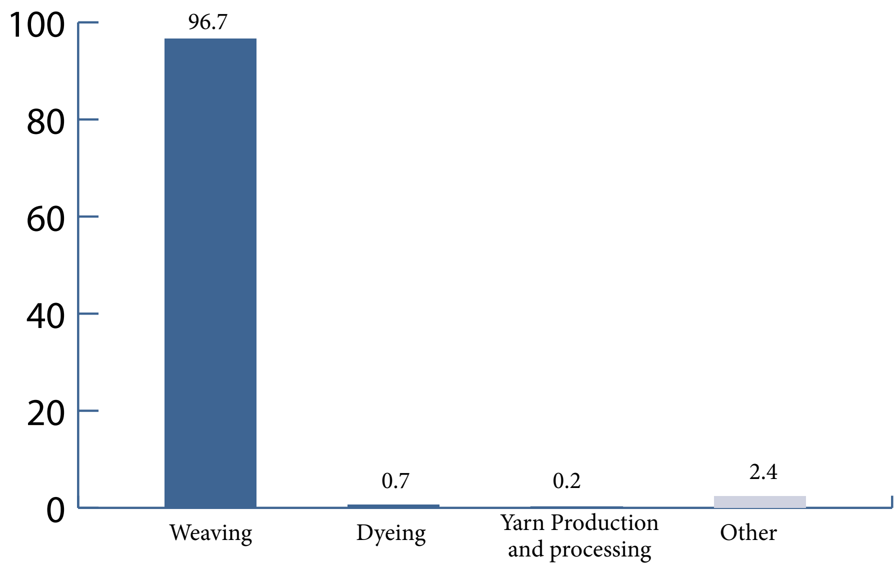
Participation by regions, 55% or 3,343 of the total 6,077 respondents were from the western region, followed by eastern region (27.9% or 1,694), central' region (9.6% or 586) and 7.5% or 454 from Thimphu dzongkhag along with Thimphu Thromde. (Fig 9b) Refer Appendix B1.10 for details.

3.2 Textile practice and production types

i) Type of textile production practice

Q. Type of hand-woven textile practice and production. Please tick (√) only ONE major or specialist practice. [*Yarn production and processing / Dyeing / Weaving/ Other*]

Figure 10 : Type of hand-women textile practice and production (%) (N=6,077)



In terms of the type of hand-woven textile practice and production, almost all (96.7% or 5,876 of 6,077) are engaged in weaving. Yarn production and processing, dyeing and other represent very little. (Fig 10, Appendix B2.1)

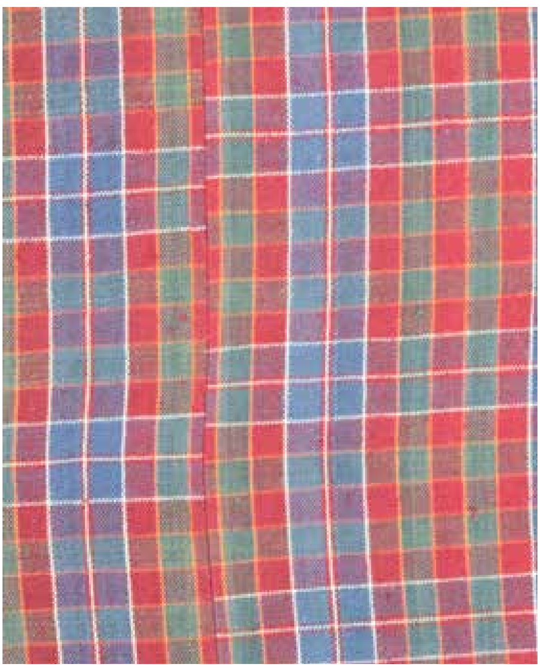
ii) Frequency of Gho types produced

Q. Most frequent types of textile products produced in the last 5 years (Frequency ranking from 1 – 5; 0 = Not at all / 5 = Most frequent)
~ *Karchang/Plain (Mathra, Sethra, AdhaMathra, Pangtshi, Jadrima, etc.)*
~ *Hor (Lungserma, Dromchuchem, Aikapur, MentseMathra)*
~ *Shinglochem*

Figure 11(a): Gho – Karchang/Plain

Pangtshi

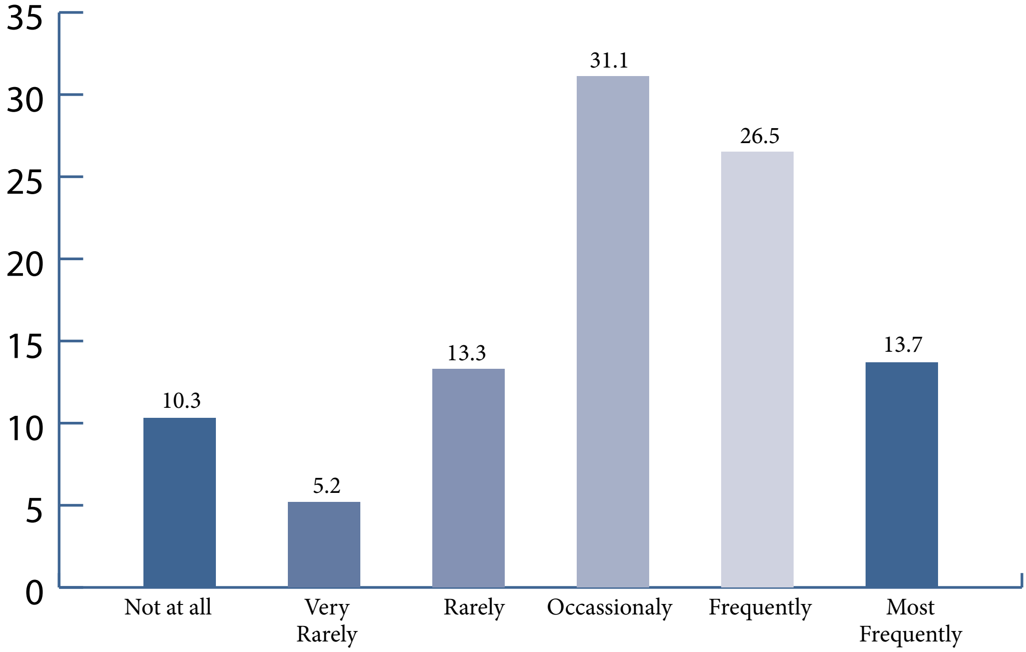
Jadrima



Mathra

Sethra

Figure 11b : Gho - Karchung/Plain/Mathra, Sethra, Adha Mathra, Pangtshi, Jadrima, etc, (%) (N=6,0077)



From the total 6,077 participants, while 31.1% or 1,889 respondents have occasionally produced *Karchang Gho* in the last 5 years, 40.2% or 2,444 have frequently (26.5% or 1,613) or most frequently (13.7% or 831) produced the same textile during the same period. (Fig 11b) Refer Appendix B2.2 for details.

Figure 12(a): Gho – Hor

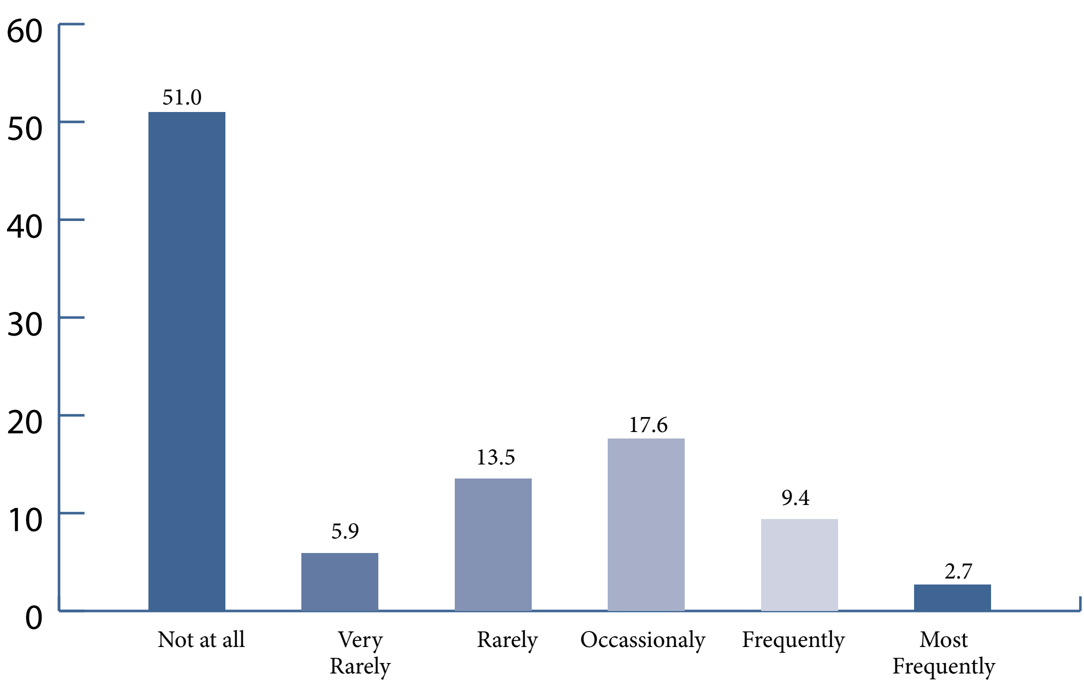
Lungserma

Dromchuchem

Aikapur

Mentse Mathra

Figure 12(a): Gho – Hor (Lungserma, Dromchuchem, Aikapur, Mentse, Mathra) (%) (N=6,077)

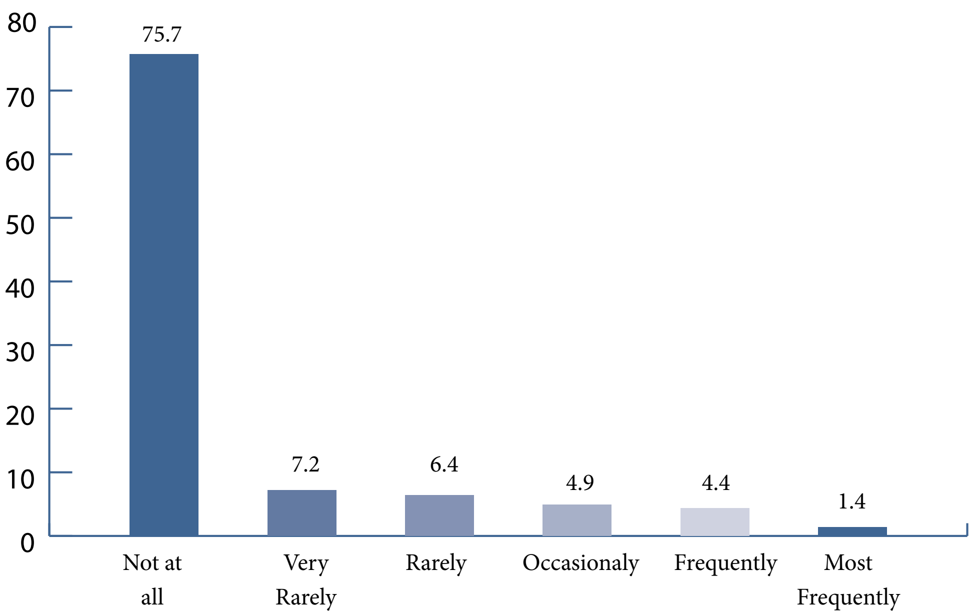


Of the 6,077 who responded to this question, 1,067 or 17.6% stated having produced *HorGho* occasionally during the past 5 years, while 12.1% or 734 produced the same textile frequently (9.4% or 570) or most frequently (2.7% or 164). (Fig 12b) Refer Appendix B2.3 for details.

Figure 13(a): Gho – Shinglochem

Shinglochem

Figure 13(b): Gho – Shinglochem (%) (N=6,077)



Out of 6,077 who responded to this question, 89.3% or 5,430 had rarely (6.4% or 389), very rarely (7.2% or 438) produced any *Shinglochem Gho* during the past 5 years. (75.7% or 4,603) had not produced at all while only 10.7% or 647 produced occasionally (4.9% or 295), frequently (4.4% or 265) or most frequently (1.4% or 87) the same textile during the same period. (Fig 13b) Refer Appendix B2.4 for details.

iii) Frequency of Kira types produced

Q. Most frequent types of textile products produced in the last 5 years. (Frequency ranking from 1 – 5; 0 = Not at all / 5 = Most frequent)

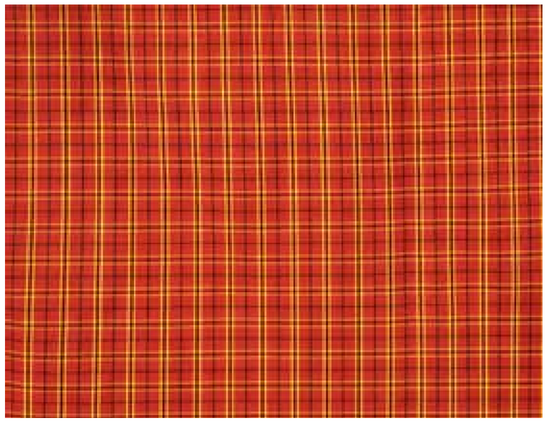
~ Karchang/Plain (Mathra, Sethra, Adha Mathra, Pangtshi, Jadrima, etc.)

~ Jamsam/ Simple pattern

~ Dhidhim (Kushuthara, Mapsham, etc)

Figure 14 (a): Kira – Karchang / Plain

Mathra



Sethra

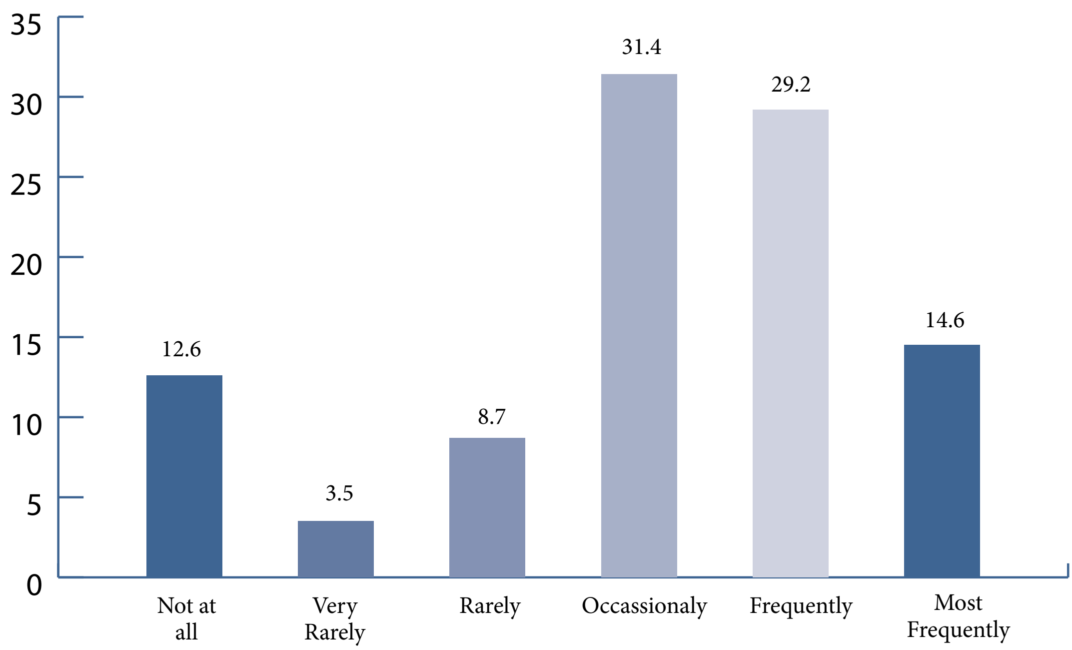
Adha Mathra

Pangtshi

Jadrima

Thara

Figure 14 (b): Kira – Karchang / Plain)Mathra, Sethra, Adha Mathra, Pangtshi, Jadrima, Thara, etc)

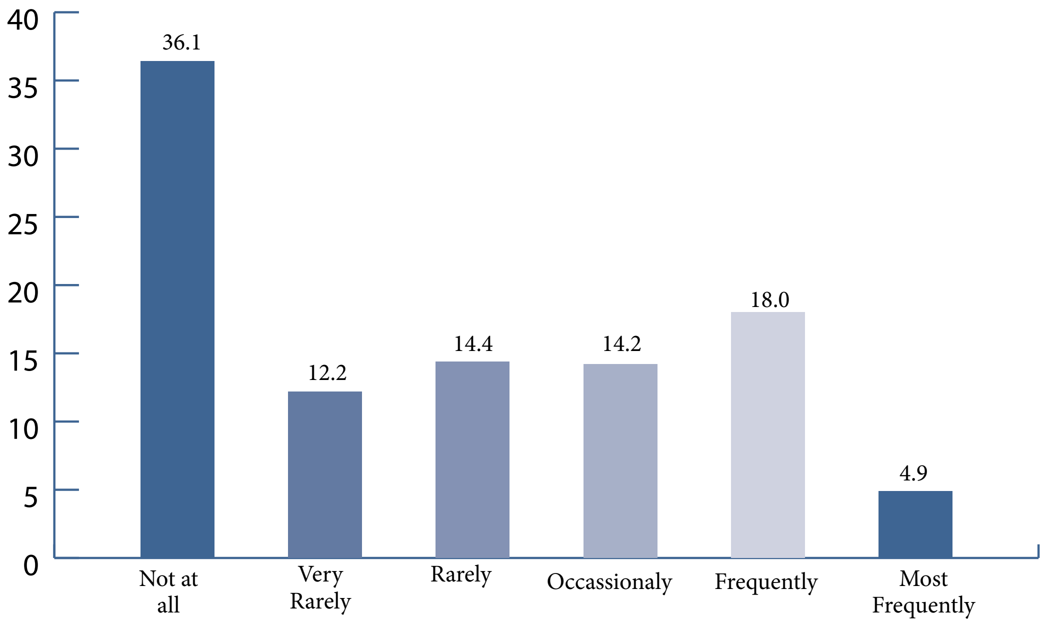


The survey shows that 43.7% or 2,657 of the respondents have frequently (29.2% or 1,777) or most frequently (14.5% or 880) produced *Karchang Kira* during the past 5 years. A further 31.4% or 1,911 respondents have produced the same textile occasionally during the same period. (Fig 14b) Refer Appendix B2.5 for details.

Figure 15(a): Kira – Jamsam / Simple pattern

Jamsam

Figure 15 (b): Kira – Simple pattern/ Jamsam (%) (N=6,077)

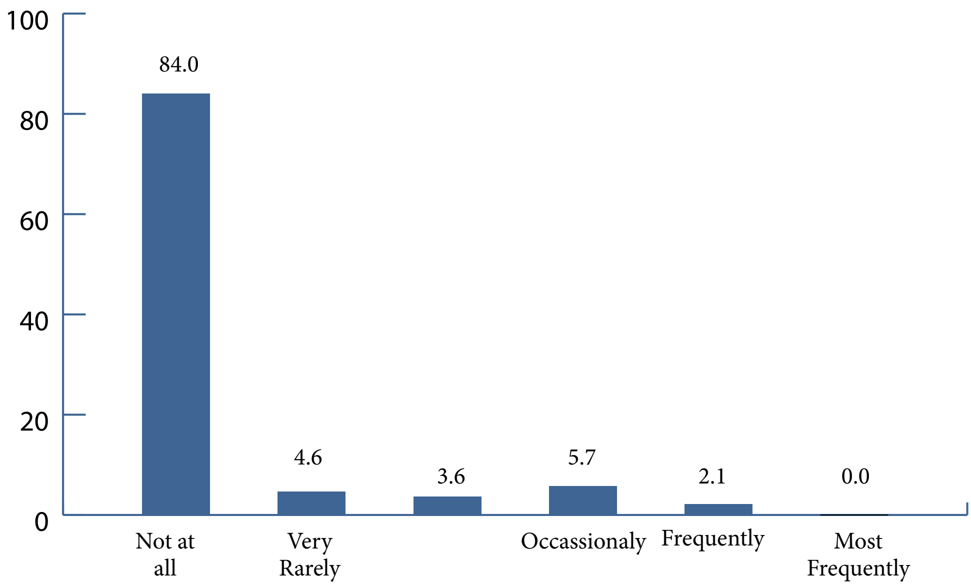


22.9% or 1,387 of the total 6,077 respondents have either frequently (18.0% or 1,091) or most frequently (4.9% or 296) produced *Jamsam Kira* during the past 5 years; another 14.2% or 861 have occasionally produced the same textile during the same period. (Fig 15b) Refer Appendix B2.6 for details.

Figure 16(a): Kira – Dhidhim / Intricate pattern

Mapsham

Figure 16(b): Kira – Dhidhim / Intricate pattern (Kishuthara, Mapsham, etc)



Only 2.1% or 130 of the total (6.077) have frequently produced *Kiras* with intricate patterns (*Dhidhim*) in the past 5 years, and another 5.7% or 347 produced the same textiles occasionally during the same period. (Fig 16b) Refer Appendix B2.7 for details.

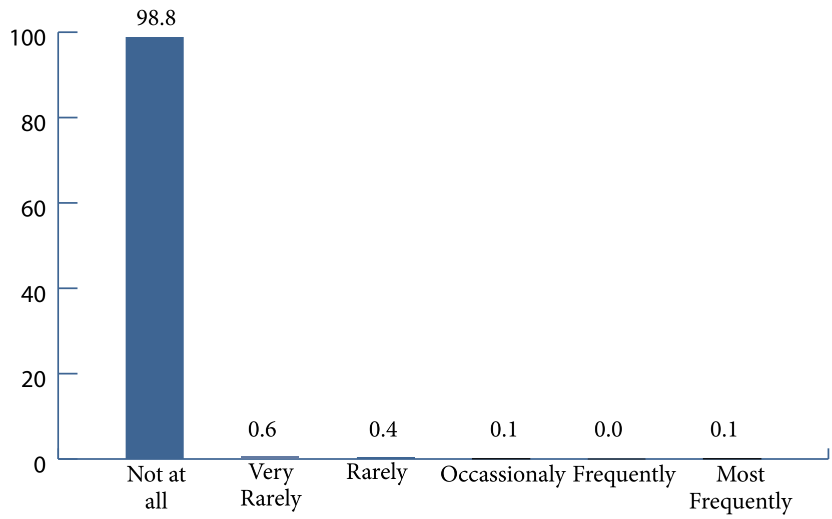
iv) Frequency of Yathra production

Q.	Most frequent types of textile products produced in the last 5 years: Yathra. (Frequency ranking from 1 – 5; 0 = Not at all / 5 = Most frequent)

Figure 17(a): Yathra

Yathra

Figure 17(b): Frequency of Yathra production (%) (N=6,077)



Nearly all (99.0% or 6,066) of the total 6,077 respondents have not at all produced *Yathra* while (98.8% or 6,007), very rarely (0.6% or 35) and (0.4% or 24) rarely produced *Yathra* in the past 5 years. Only 0.3% or 11 of the respondents have either occasionally (0.1% or 4), frequently (0.1% or 3) or most frequently (0.1% or 4) produced the *Yathra* during the same period. (Fig 17b) Refer Appendix B2.8 for details.

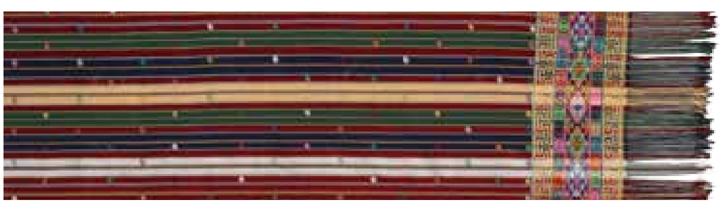
v) ***Frequency of 'Other' types of traditional textiles production***

Q. Most frequent types of textile products produced in the last 5 years: Other types of traditional textile (Rachu, Kera, Kheb, etc). (Frequency ranking from 1 – 5; 0 = Not at all / 5 = Most frequent)

Figure 18(a): Other types of traditional textiles

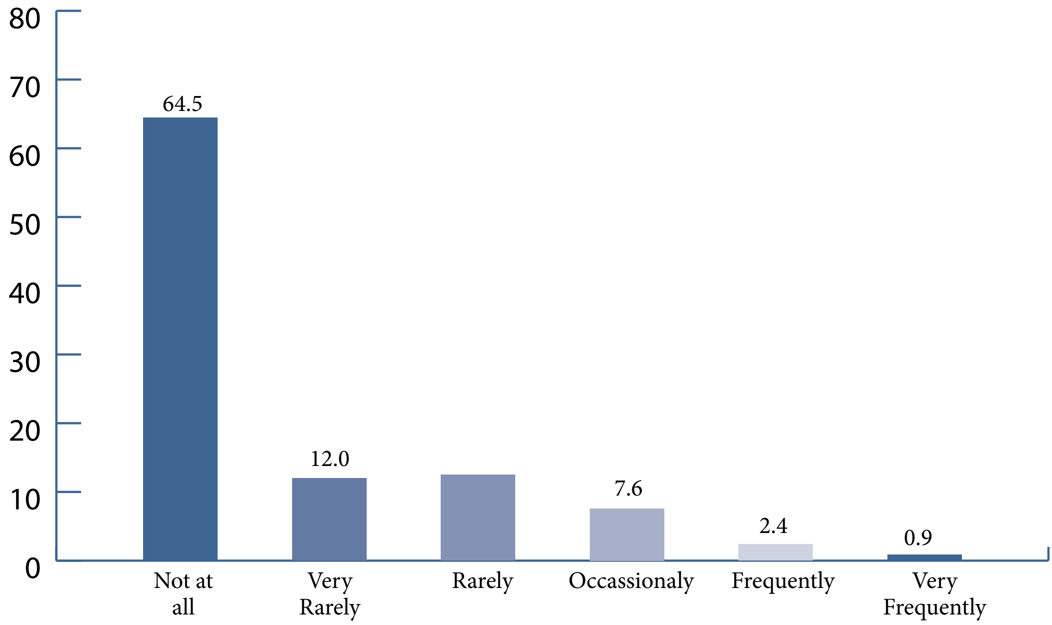
Kera

Thrikheb



Adha Rachu

Figure 18(b): Other types of traditional textiles



89% (5,411) of the total 6,077 respondents have either 'rarely' (12.5% or 759), 'very rarely' (12% or 732) or 'not at all' (64.5% or 3,920) produced 'other types of traditional textile' in the past 5 years. Only 10.9% or 666 have either 'occasionally' (7.6% or 461), 'frequently' (2.4% or 148) or 'most frequently' (0.9% or 57) produced the same textiles during the same period. (Fig 18b) Refer Appendix B2.10 for details.

v) *Frequency of 'Contemporary' textiles / fabric production*

Q. Most frequent types of textile products produced in the last 5 years (Frequency ranking from 1 – 5; 0 = Not at all / 5 = Most frequent)

- ~ Contemporary textiles/fabric
- ~ Name of textile/fabric

Figure 19(a): Contemporary textiles

Shawl

Scarf

Table Cloth

Multipurpose Textile Panel

Figure 19(b): Production of contemporary textiles, e.g. scares, stoles, textiles for furnishing, etc. (%)

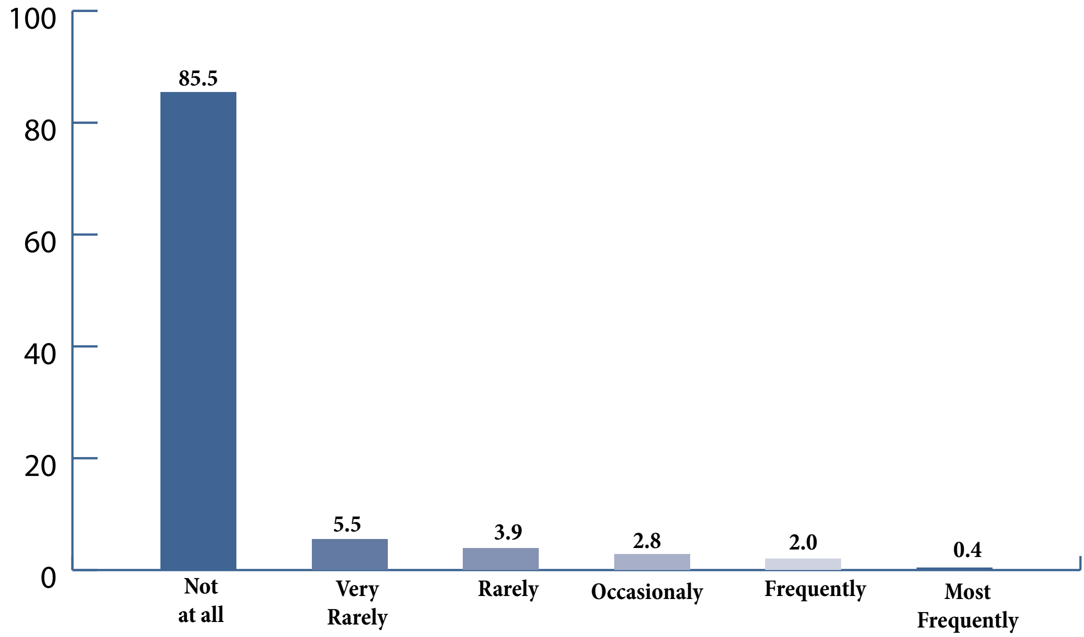
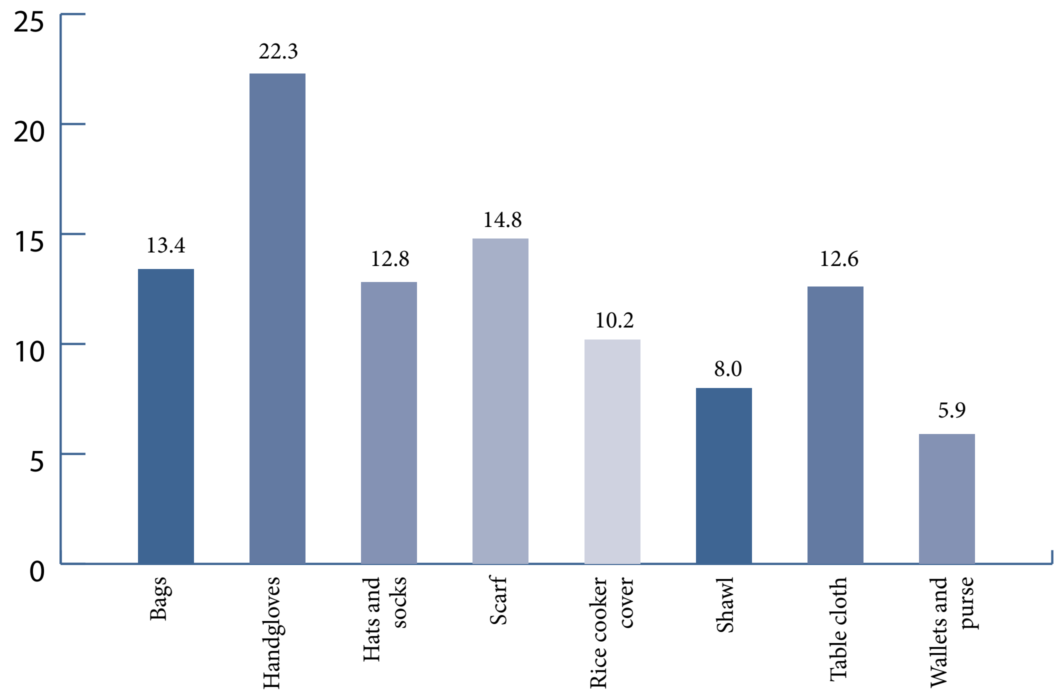


Figure 19(c): Production of tyoes of contemporary textiles (% (N=4,444)

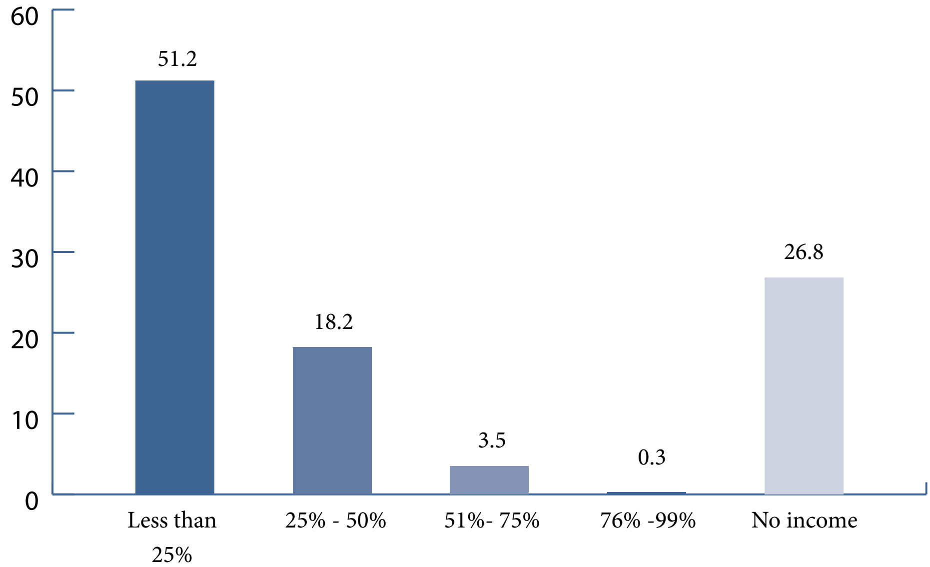


Of the 6,077 participants, only 2.4% (141) of the respondents either 'frequently' (2.0% or 119) or 'most frequently' (0.4% or 22) produced contemporary textiles in the past 5 years. Additionally, 2.8% or 173 of the respondents 'occasionally' produced contemporary textiles during the same period. 85.5% (5,193) of the respondents did not produce any such contemporary textiles (not at all) and the remaining did 'rarely' (3.9% or 236) or 'very rarely' (5.5% or 334). (Fig 19b, Appendix B2.11) Contemporary items included bags, hand gloves, hats and socks, scarves, rice cooker covers, shawls, table cloths, wallets and purses, etc. with proportions ranging from 5.9% or 263 (wallet and purse) to 22.3% or 989 respondents (hand gloves). (Fig 19c, Appendix B2.12)

3.3 Income

Q. Percentage of household income from weaving in a month. Please tick (√) ONE only. [*Less than 25% / 26 – 50% / 51 – 75% / 76 – 99% / 100%*]

Figure 20: Percentage of household income derrived from weaving in a month (%)

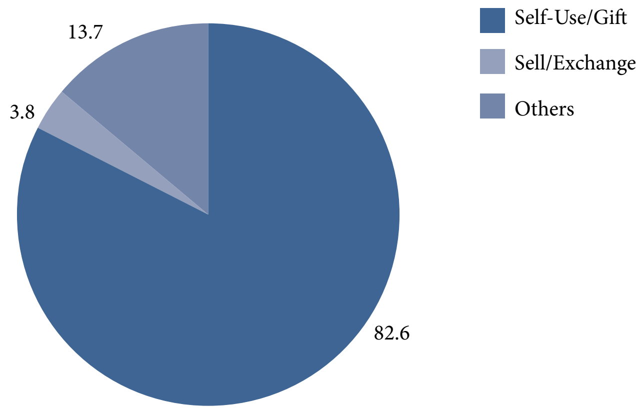


On the percentage of household income derived from weaving in a month, 51.2% (3,112) of the respondents indicated 'less than 25%' of household income being derived from weaving in a month, followed by 18.2% (1,103) of the respondents for '26% – 50%'. While it is 3.5% (213) respondents for '51% - 75%' and 0.3% (19) for '76% - 99%', there is nobody deriving 100% of household income from weaving in a month. 26.8% (1,630) of the participants derive no income from weaving. (Fig 20, Appendix B3.1)

3.4 Basic Weaving Practice

i) Making textiles for, assistance in weaving

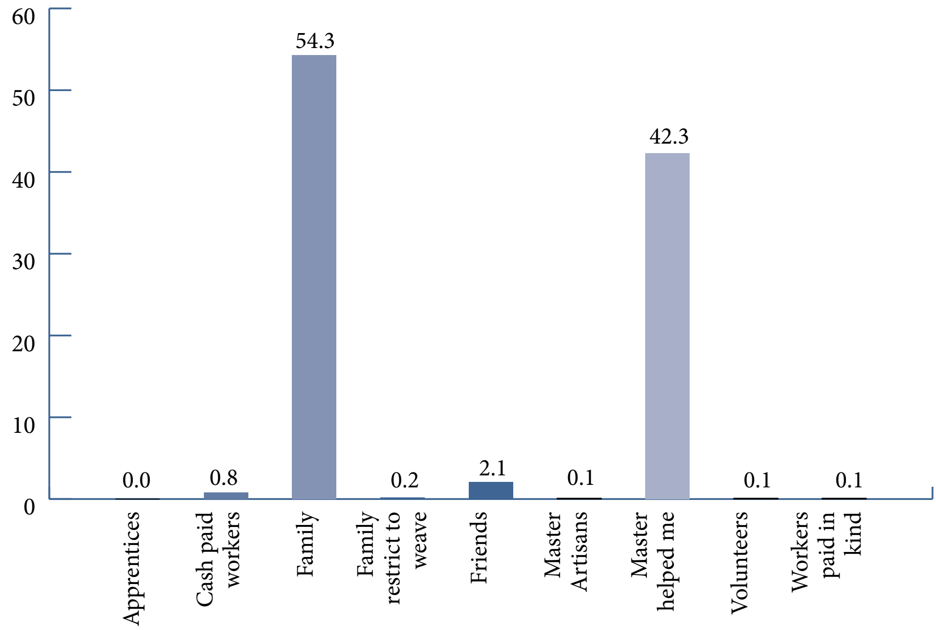
Q. What do you mainly make your textile for? Please tick (√) ONE only. [Self-Use or Gift/ Sell or Exchange/ Other]



Of the total respondents (6,077), 82.6% or 5,017 make their textile products mainly for their own use or for gifts. While only 3.8% (228) make them to either 'sell' or for 'exchange', 13.7% (832) make based on orders, commission and/or as old-age engagement. (Fig 21) Refer Appendix B4.1 for details.

Q. Who are the main people who usually help you weave? Please tick (√) ONE only. [Family/ Cash paid workers/ Master Artisans/ Volunteers/ Friends/ Workers paid in kind/ Apprentices/ Nobody helped me (Skip to question 5)/ Other]

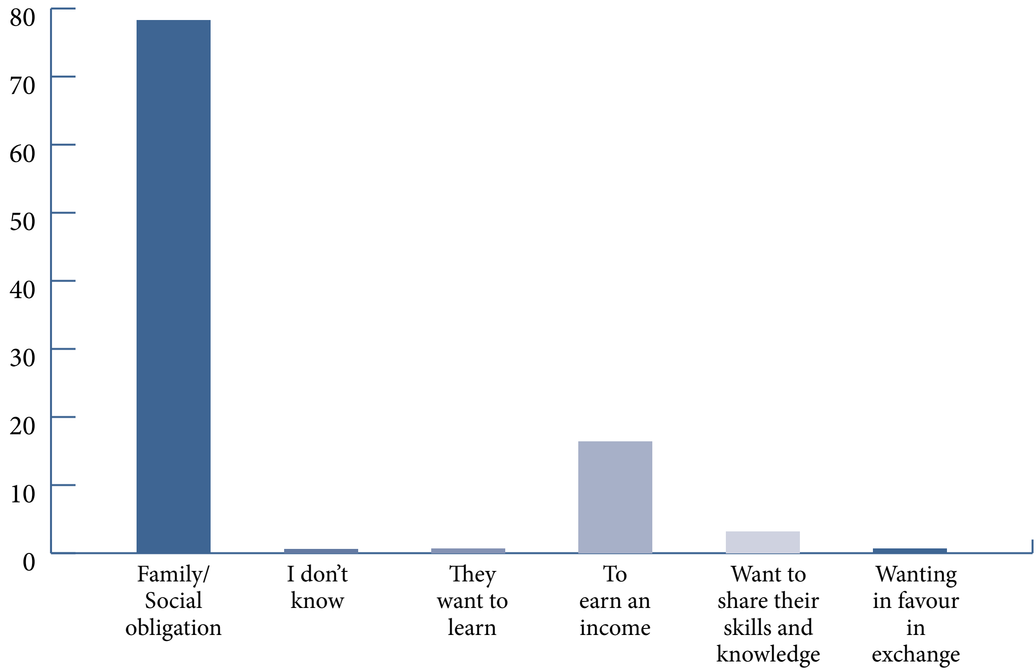
Figure 22: Main usual helpers in weaving (%) (N=6.077)



54.3% or 3,297 respondents of the total (6,077) were mainly helped by 'family' members in their weaving and to a small extent, by their friends (2.1% or 130). 42.3% (2,572) respondents were not helped by anybody. (Fig 22) Refer Appendix B4.2 for details.

Q. What is the main reason for them to help you weave? Please tick (√) ONE only. [Family or Social obligation/ To earn an income/ Wanting in favour in exchange/ Want to share their skills and knowledge/ They want to learn/ I don't know/ Other]

Figure 23: Percentage of household income derrived from weaving in a month (%)

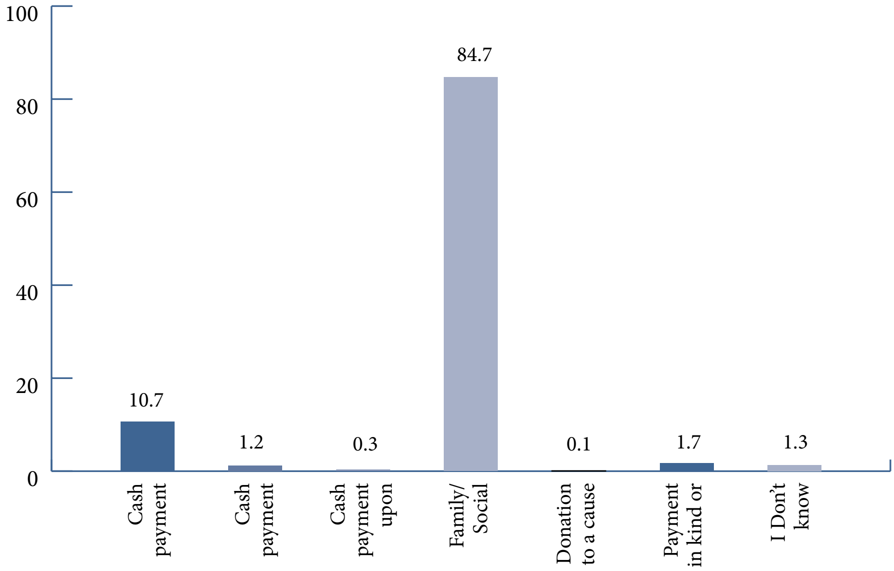


Of the total respondent, 78.3% or 2,800 indicated 'family or social obligation' as the main reason for rendering help in weaving, followed by 16.4% or 586 'to earn an income' and 3.2% or 116 'want to share their skills and knowledge' as the main reasons for helping. (Fig 23) Refer Appendix B4.3 for details.

ii) Rewards for assistance

Q.	How did you reward them? Please tick (√) all that applies. [Family/Social acknowledgements/ Cash payment calculated by time/ Cash payment calculated when products are sold/ Cash payment upon distribution of profit after sales of goods/ Payment in kind or exchanged in favours/ Donation to a cause/ I don't know]

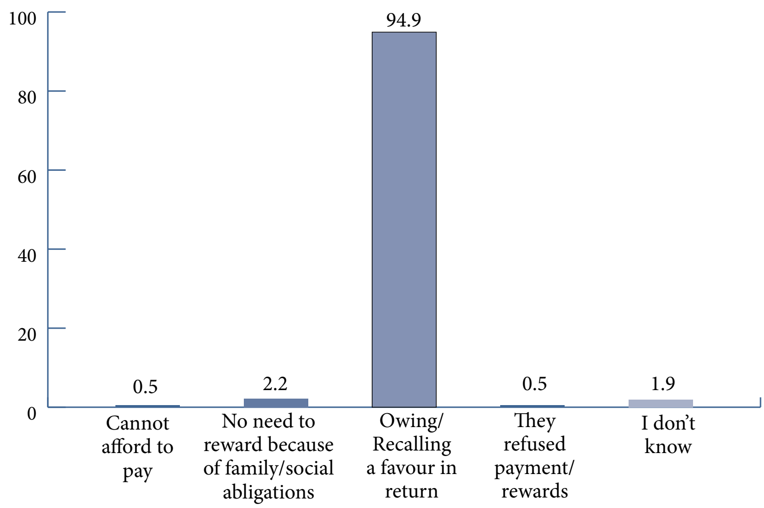
Figure 24: Reward system (%) (N=3,927)



The bulk of the reward for providing help in weaving is through 'family/social acknowledgements' as indicated by 84.7% or 3,326 of the respondents, followed by 12.2% or 481 being rewarded by 'cash payment', whether calculated by 'time', 'when products are sold', or 'upon distribution of profit after sales of goods'. (Fig 24) Refer Appendix B4.4 for details.

Q. Reasons for not rewarding. Tick (√) all that applies. [*No need to reward because of family or social obligations/ Owing or recalling a favour in return/ Cannot afford to pay/ They refused payment or rewards/ I don't know*]

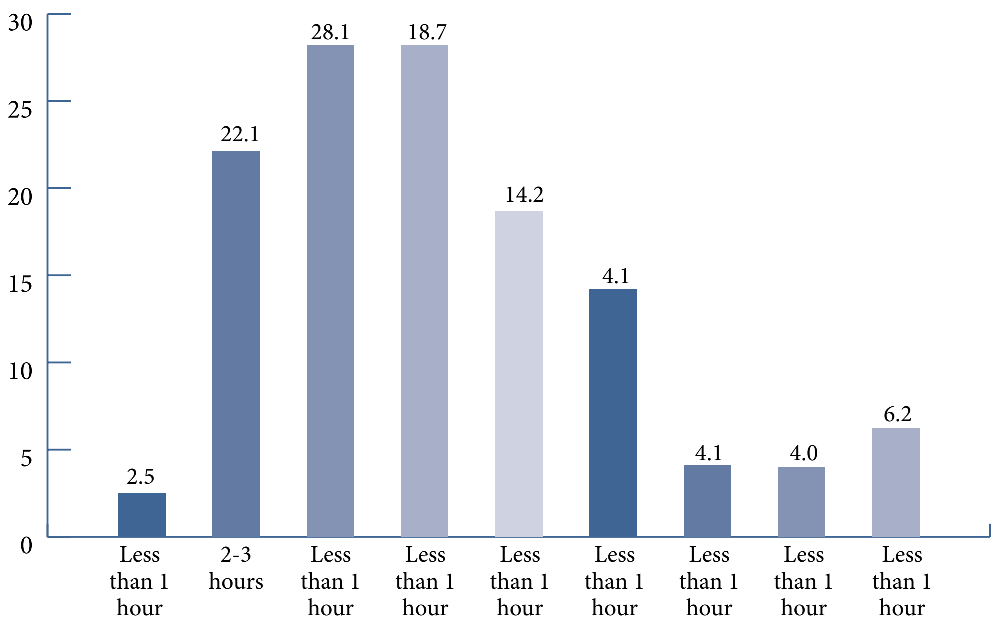
Figure 25: Reasons for not rewarding (%) (N=2,786)



94.9% or 2,643 of the total respondents have indicated 'owing/recalling a favour in return' as the reason for not rewarding for providing help in weaving, followed by 2.2% or 62 indicated 'no need to reward because of family/social obligations' as the reason. (Fig 25) Refer Appendix B4.5 for details.

iii) Time spent on weaving, fixed time, periods

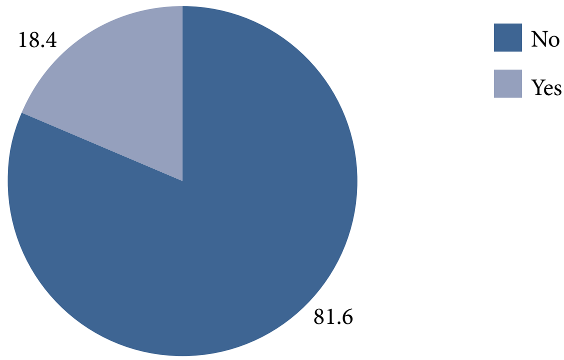
Q. Typically, how many hours do you spend a day weaving? Please tick (√) ONE only. [*Less than 1 hour/ 2 – 3 hours/ 3 – 4 hours/ 4 – 5 hours/ 5 – 6 hours/ 6 – 7 hours/ More than 7 hours*]



Of the total respondents, 28.2% or 1,715 have indicated spending 3 – 4 hours a day weaving, followed by 22.1% or 1,344 spending 2 – 3 hours, 4 – 5 hours by 18.7% or 1,135, and 5 – 6 hours by 14.2% or 865 respondents. 6.2% or 376 of the participants weave occasionally. (Fig 26) Refer Appendix B4.6 for details.

Q. Do you have any fixed time during the day when you don't weave? Please tick (√) Yes or No. If NO, skip to question 8.

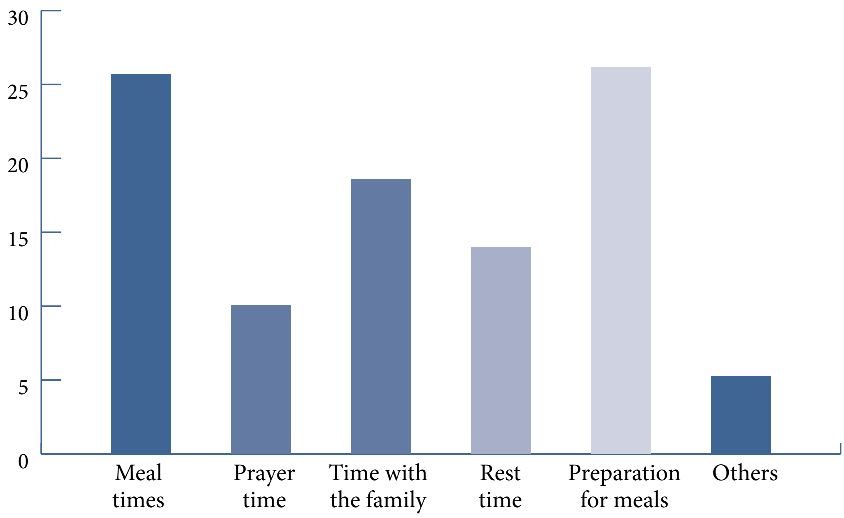
Figure 27: Reasons for not rewarding (%) (N=2,786)



Of the total respondents, 81.6% or 4,699 have indicated as having no fixed time when they do not weave and 18.4% or 1,063 of the respondents have stated that they have a fixed time when they do not weave. (Fig 27) Refer Appendix B4.7 for details.

Q. What are these periods? Please tick (√) all that applies. [*Preparation for meals/ Meal times/ Prayer times/ Time with the family/ Rest time/ Other*]

Figure 28: Daily times when respondents are not weaving (%) (N=4,753)

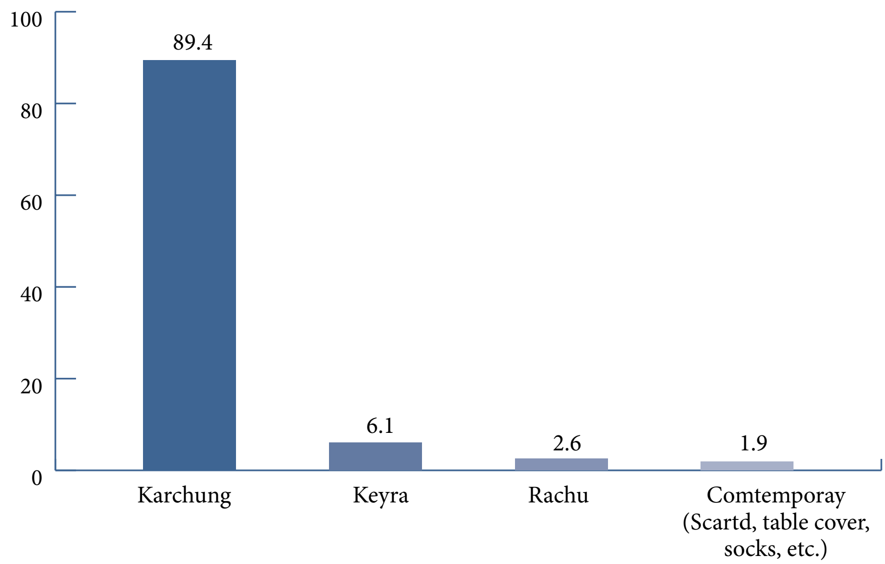


Of the total respondents, 20.5% or 1,247 and 20.1% or 1,221 respectively have indicated that they do not weave during 'preparation for meals' and 'meal times'; followed by 'time with the family' (14.5% or 884), 'rest time' (11.0% or 667) and 'prayer times' (7.9% or 482). (Fig 28). Refer Appendix B4.8 for details.

iv) *Time taken to weave*

Q. Reviewing the range of textiles which you had made in the past 5 years, please name 1 product that takes the shortest time to weave.

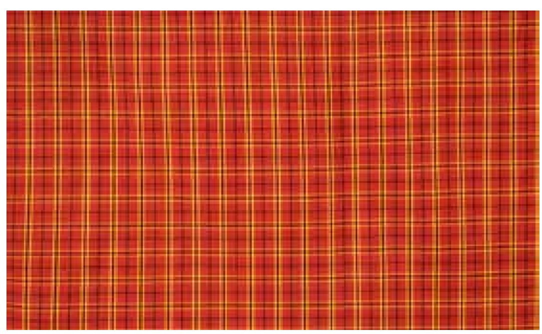
Figure 29(b): Gho/Kira - Karchang/Plain



Identifying a textile type that takes the shortest time to weave, 89.4% or 4,826 of the total respondents found '*Karchang*' as taking the shortest time to weave. (Fig 29a, Appendix B4.9a)

Figure 29(b): Gho/Kira – Karchang / Plain

Mathra



Sethra

Adha Mathra

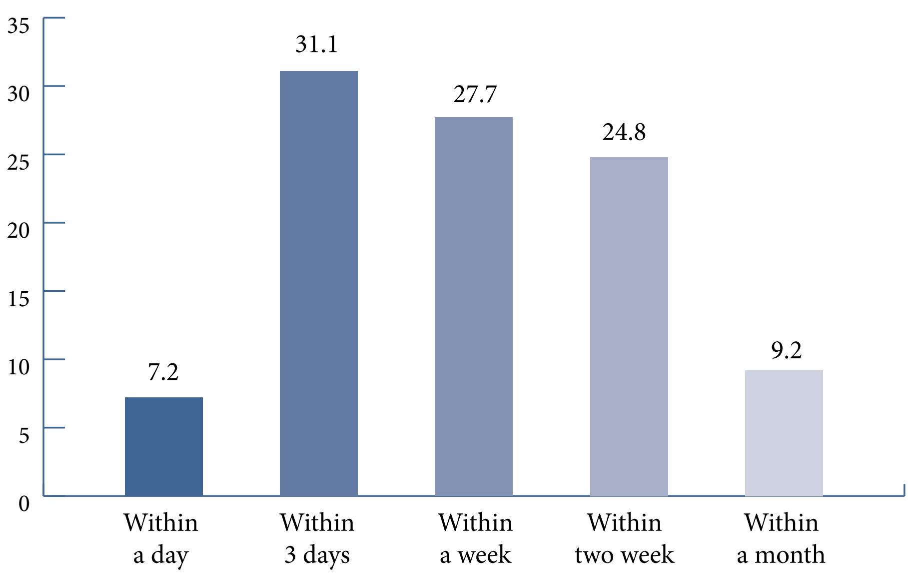
Pangtshi

Jadrima

Thara

Q. How many days did it take you to weave? Please tick (√) ONE only [*Within a day/ Within three days/ Within a week/ Within two weeks/ Within a month*]

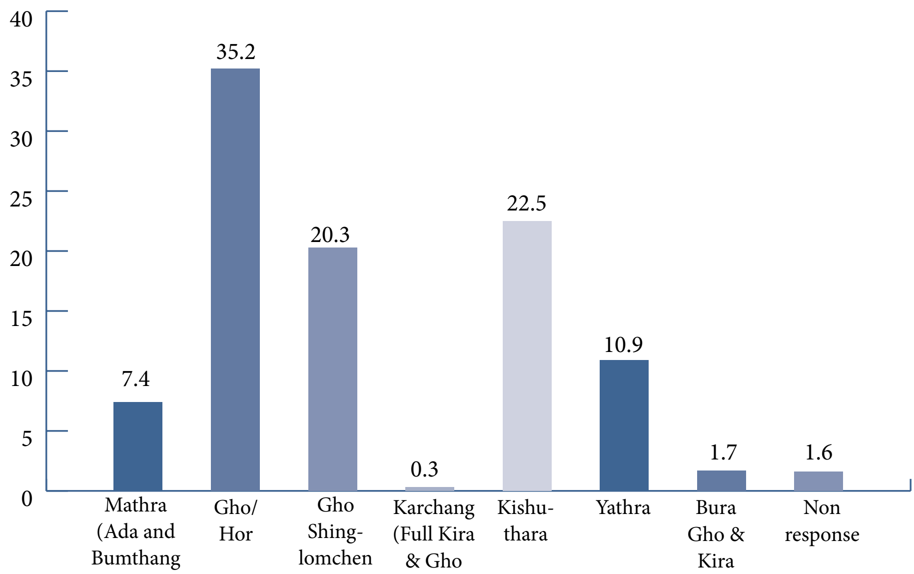
Figure 29(c): Shortcuts time taken to weave (%) (N=5,373)



In determining how short it takes to weave a textile product, 31.1% or 1,669 of the total respondents have indicated within 3 days, followed by 'within a week' (27.7% or 1,491), and 'within two weeks' (24.8% or 1,330). However,7.2% or 389 have indicated as having completed the weave 'within a day' on the one hand and 9.2% or 494 completing the weave 'within a month' on the other hand. (Fig 29c) Refer Appendix B4.9b for details.

Q. Reviewing the range of textiles which you had made in the past 5 years, please name 1 product that takes the longest time to weave.

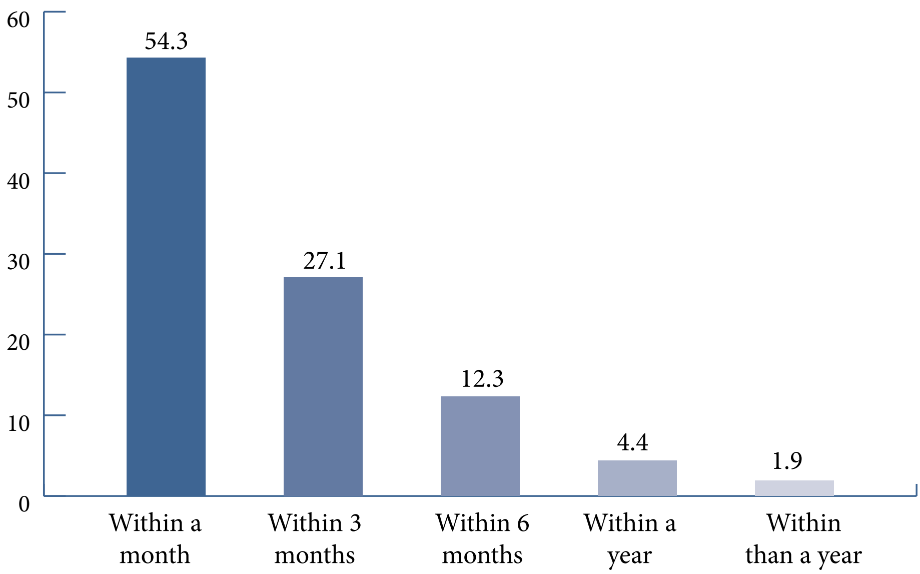
Figure 30(a): Textile type taking the longest duration to weave (%) (N=6,077)



In terms of identifying the textile type that takes the longest time to weave, 35.2% or 2,137 of the total respondents have named '*HorGho*' as taking the longest duration to weave, followed by '*Kushuthara*' (22.5% or 1,365), '*GhoShinglochem*' (20.3% or 1,235), etc. (Fig 30a, Appendix B4.10a)

Q. How many months did it take you to weave? [*Within a month/ Within 3 months/ Within 6 months/ Within a year/ More than a year*]

Figure 30(b): Longest duration to weave a textile type (%) (N=4,420)



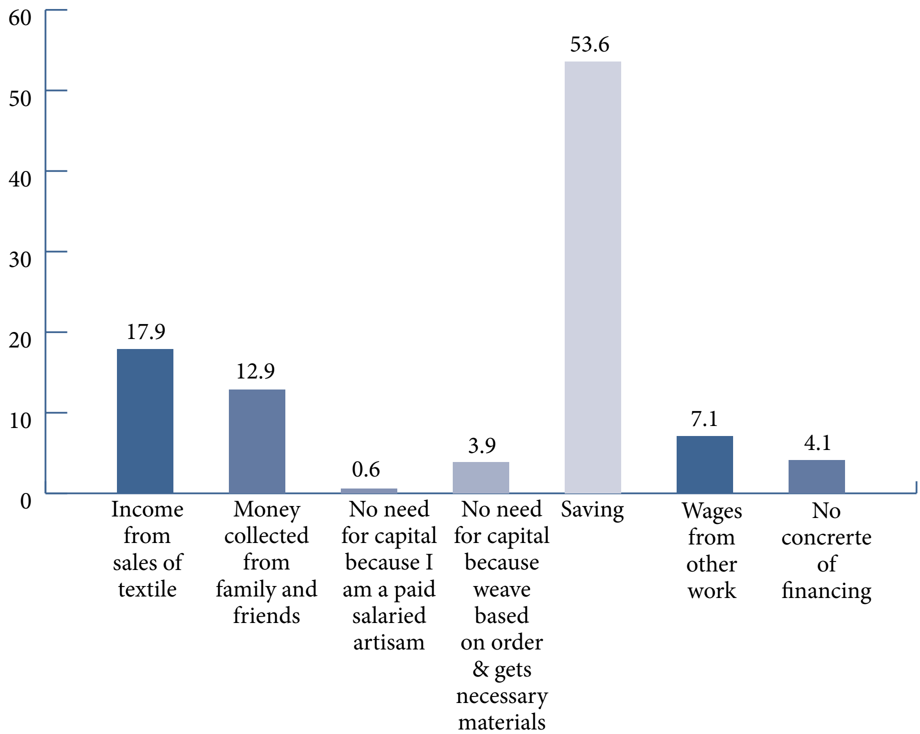
In determining how long it takes to weave certain textile products, 54.3% or 2,401 of the total respondents have indicated as completing the weave 'within a month', followed by 'within 3 months' (27.1% or 1,198) and 'within 6 months' (12.3% or 542). However, while 4.4% or 196 have stated completing the weave 'within a year', 1.9% or 83 said they take 'more than a year' to make the weave. (Fig 30b) Refer Appendix B4.10b for details.

3.5 Production

3.5.1 Capital

Q. What is the main source of money to finance the production of your textiles? Please tick (√) ONE only [*Income from sales of textiles/ Savings/ Formal or official loans/ Informal or unofficial loans/ Money collected from family and friends/ Government investment/ Wages from other work/ NGOs or Foundations or Institutions or Aid agencies/ No need for capital because I am a paid or salaried artisan/ No need for capital because I only weave upon order and the person who orders provide me necessary materials to work and/or pays for the materials in advance*]

Figure 31: Main source of income to finance weaving (%) (N=6,077)



Of the total respondents, 53.6% or 3,260 have indicated having used their 'savings' to finance their weaving (can be 60.7% or 3,690, if 'wages from other work' is considered as 'savings'). 17.9% or 1,086 financed from 'income from sales of textiles' and 12.9% or 782 sourced from 'money collected from family and friends'. Although small, 3.9% or 236 have indicated basing their weaves on orders from clients with the provision of necessary materials. 4.1% or 247 have no concrete source of income for financing their weaving activities. (Fig 31) Refer Appendix B5.1 for details.

3.5.2 Raw Materials

(i) Frequency of use of fibre types as based-material

Q. For weavers, please rank the frequency of the fibre type you have been using as based material in the past 12 months (0 = Not at all, 5 = Most frequent)
A. Bhutan – Cotton, Sheep Wool, Yak Wool, Nettle, Others
B. Imported – Cotton (Industrial produced), Mercerised cotton (Khaling cotton), Cotton (hand produced), Poly-cotton (Teri-cotton), Reeled or Filament Silk (Seshu), Spun Silk (Bura), Wool, Acrylic, Others

Figure 32(a): Bhutan raw materials

Cotton

Sheep wool

Yak wool

Nettle fibre

Figure 32(b): Imported raw materials

Cotton (Industrial produced)

Mercerised cotton (Khaling)

Cotton (hand produced)

Poly-or Teri-cotton

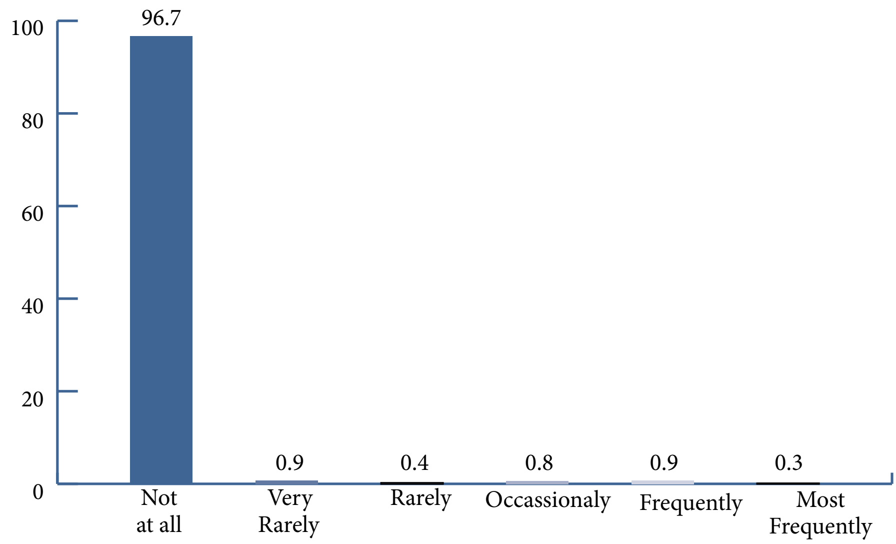
Reeled of Filament silk (Seshu)

Eri silk (Bura)

Wool

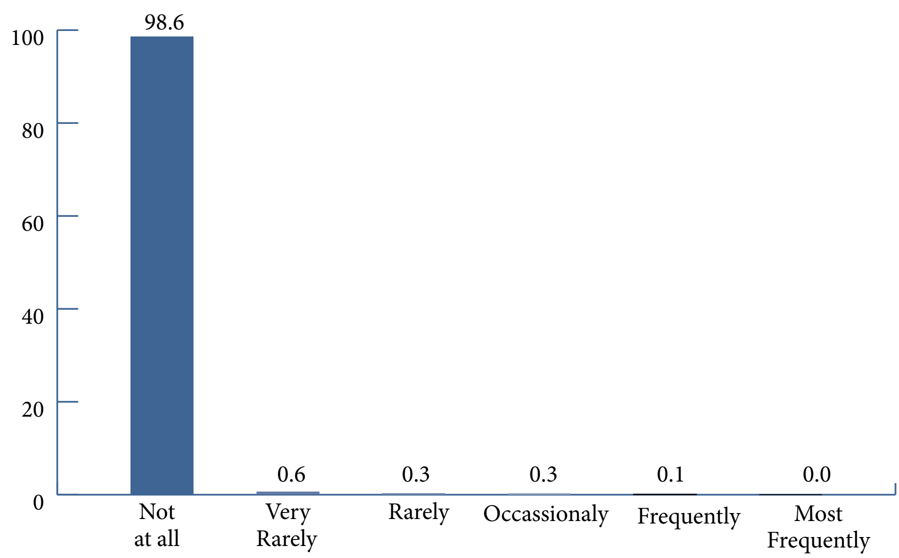
Acrylic

Figure 33(a): Frequency of use of Bhutanese cotton in the past 12 months (%) (N=6,077)



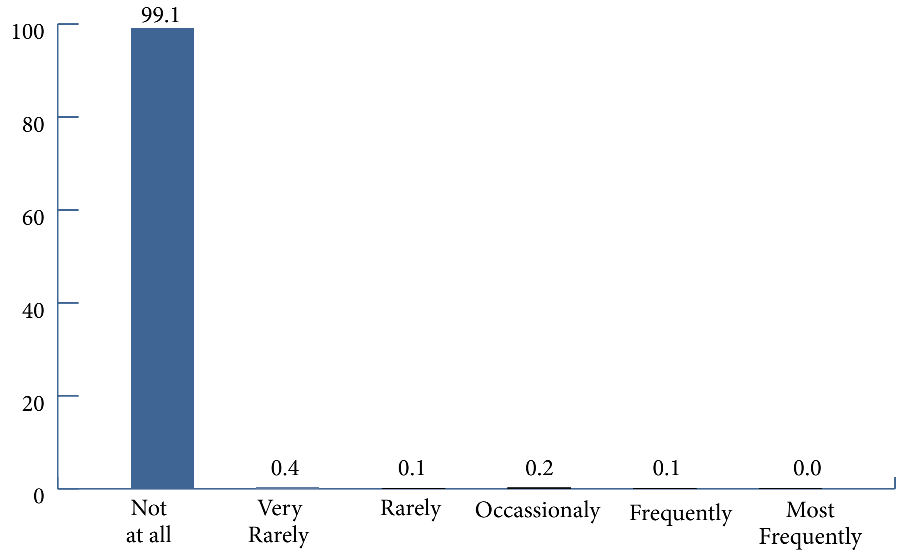
Data shows that while 1.2% (74) of the weavers have frequently used Bhutanese cotton in the past 12 months, 0.8% (47) have occasionally used it during the same period. Close to 100% (98% or 5,958) have not at all or have rarely used. (Fig 33a) Refer Appendix B6.1 (a) for details.

Figure 33(b): Frequency of use of Bhutanese Sheep wool in the past 12 months (%) (N=6,077)



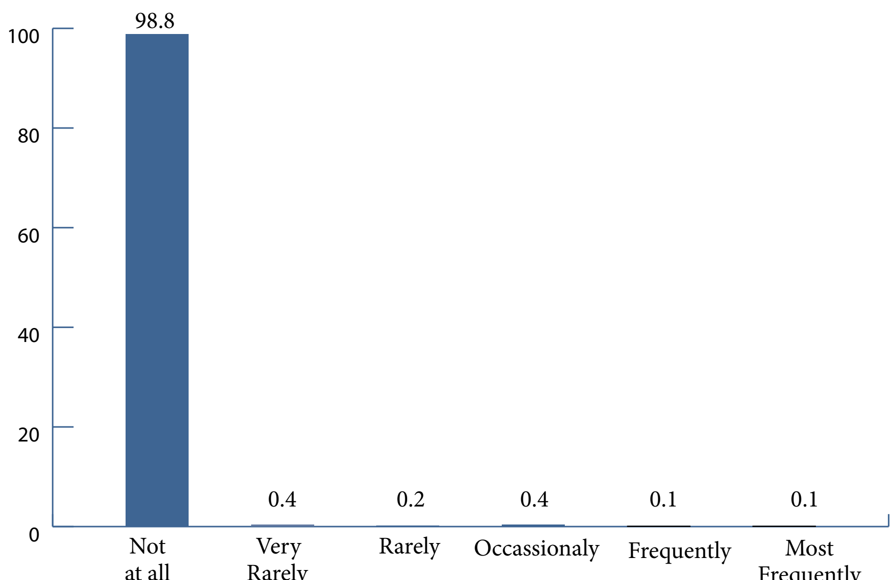
Data shows that while 0.1% (8) of the weavers have frequently used Bhutanese sheep wool in the past 12 months, 0.3% (19) have occasionally used it during the same period. Nearly 100% (99.5% or 6,050) have not at all or have rarely used it. (Fig 33b) Refer Appendix B6.1 (a) for details.

Figure 33(c): Frequency of use of Bhutanese Yak wool in the past 12 months (%) (N=6,077)



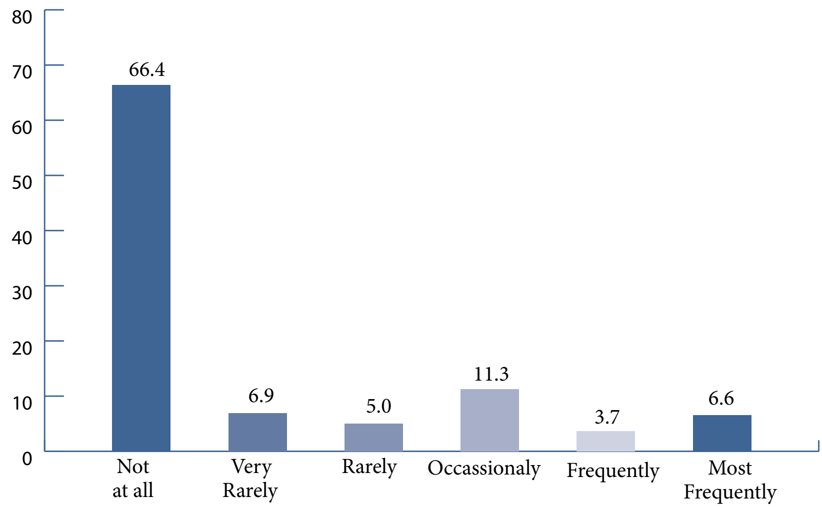
Data shows that while 0.1% (10) of the weavers have frequently used Bhutanese yak wool in the past 12 months, 0.2% (11) have occasionally used it during the same period. Nearly 100% (99.6% or (6,056) have not at all or rarely used it. (Fig 33c) Refer Appendix B6.1(a) for details.

Figure 33(d): Frequency of use of Bhutanese nettle fibre in the past 12 months (%) (N=6,077)



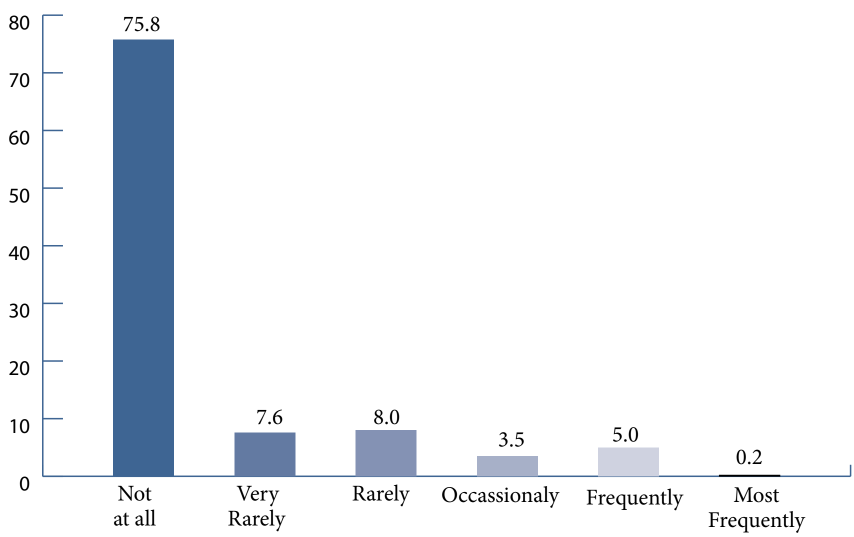
Data shows that while 0.2% (15) of the weavers have frequently used Bhutanese nettle fibre in the past 12 months, 0.4% (22) have occasionally used it during the same period. Nearly 100% (99.4% or 6,040) have not at all or rarely used it. (Fig 33d). Refer Appendix B6.1(a) for details.

Figure 34(a): Frequency of use of imported cotton (Idustrial produced) in the past 12 months (%) (N=6,077)



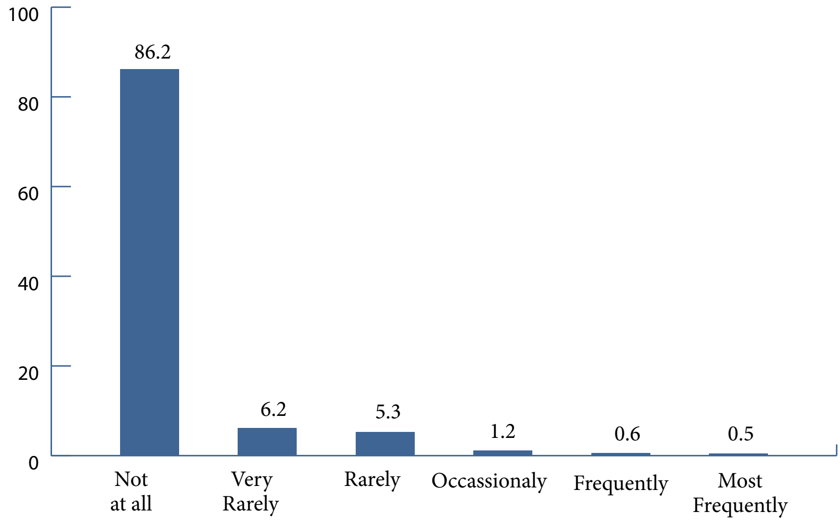
Data indicates that while 10.3% (626) of the weavers have frequently used imported cotton (industrial produced) in the past 12 months, 11.3% (689) have occasionally used it during the same period. On the other hand, 78.3% (4,762) have not at all or rarely used. (Fig 34a) Refer Appendix B6.1(b) for details.

Figure 34(b): Frequency of use of imported mercerised cotton (Khaling cotton) in the past 12 months (%) (N=6,077)



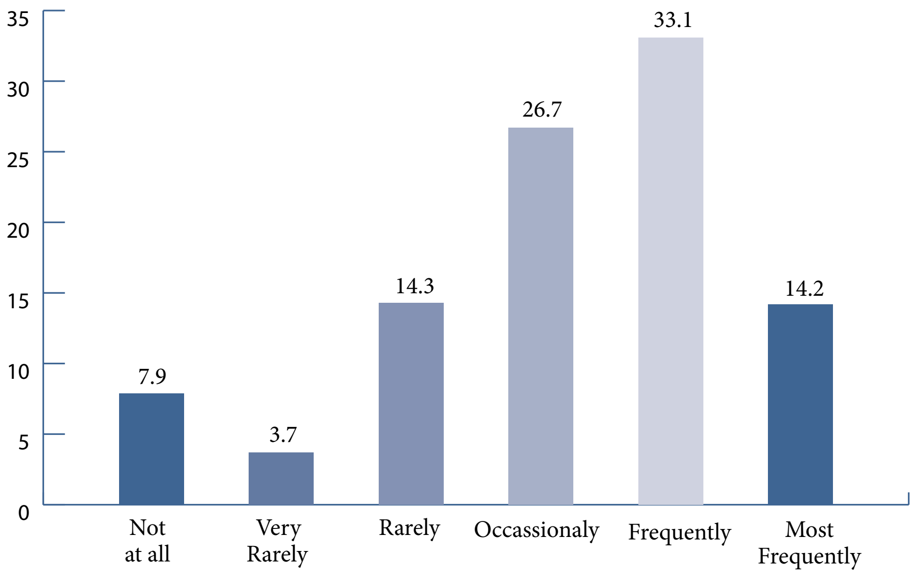
Data indicates that while 5.2% (314) of the weavers have frequently used imported mercerised cotton (Khaling produced) in the past 12 months, 3.5% (211) have occasionally used it during the same period. On the other hand, 91.4% (5,552) have not at all or rarely used. (Fig 34b) Refer Appendix B6.1(b) for details.

Figure 34(c): Frequency of use of imported cotton (Hand produced) in the past 12 months (%) (N=6,077)



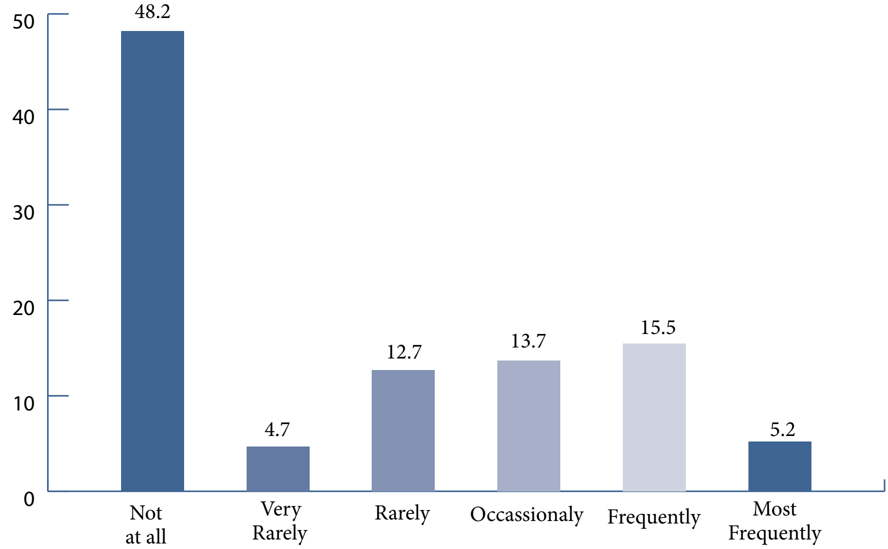
Data indicates that while 1.1% (68) of the weavers have frequently used imported cotton (hand produced) in the past 12 months, 1.2% (72) have occasionally used it during the same period. On the other hand, 97.7% (5,937) have not at all or rarely used. (Fig 34c) Refer Appendix B6.1(b) for details.

Figure 34(d): Frequency of use of imported poly-cotton (Teri-cotton) in the past 12 months (%) (N=6,077)



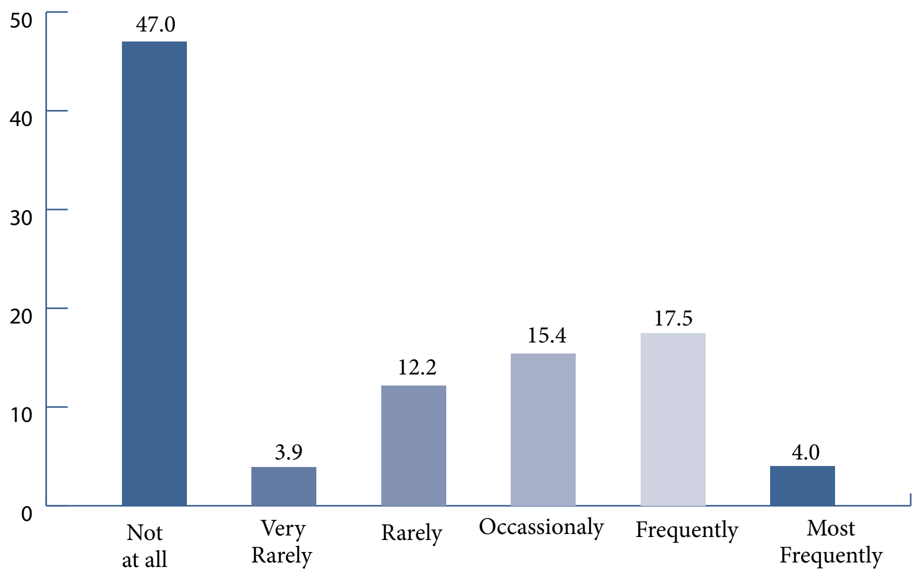
Data indicates that while 47.3% (2,876) of the weavers have frequently used imported cotton (Teri-cotton) in the past 12 months, 14.3% (1,623) have occasionally used it during the same period. On the other hand, 25.9% (1,578) have not at all or rarely used. (Fig 3d) Refer Appendix B6.1(b) for details.

Figure 34(e): Frequency of use of imported reeled or filament silk (Seshu) in the past 12 months (%) (N=6,077)



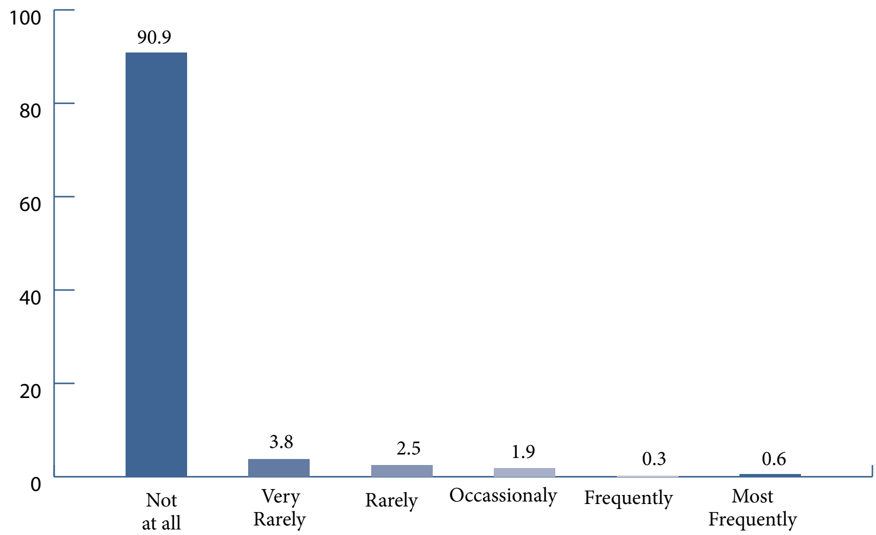
Data indicates that while 20.7% (1,258) of the weavers have frequently used imported reeled or filament silk (*Seshu*) in the past 12 months, 13.7% (835) have occasionally used it during the same period. On the other hand, 65.6% (3,984) have not at all or rarely used. (Fig 34e) Refer Appendix B6.1(b) for details.

Figure 34(f): Frequency of use of imported spun silk (Bura) in the past 12 months (%) (N=6,077)



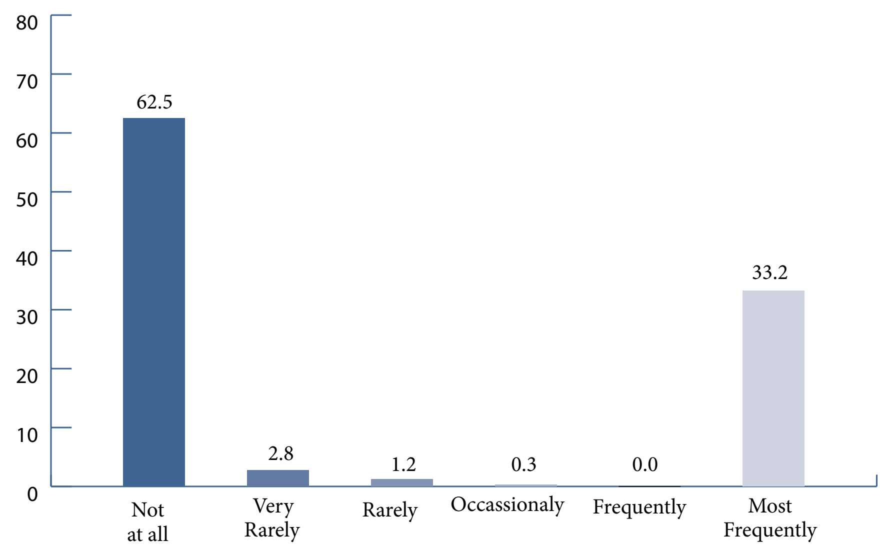
Data indicates that while 21.5% (1,308) of the weavers have frequently used imported spun silk (*Bura*) in the past 12 months, 15.4% (936) have occasionally used it during the same period. On the other hand, 63.1% (3,833) have not at all or rarely used. (Fig 34f) Refer Appendix B6.1(b) for details.

Figure 34(g): Frequency of use of imported wool in the past 12 months (%) (N=6,077)



Data indicates that while 0.9% (55) of the weavers have frequently used imported wool in the past 12 months, 1.9% (117) have occasionally used it during the same period. On the other hand, nearly 100% (97.2% or 5,905) have not at all or rarely used. (Fig 34g) Refer Appendix B6.1(b) for details.

Figure 34(h): Frequency of use of imported wool in the past 12 months (%) (N=6,077)



Data indicates that while 33.2% (626) of the weavers have frequently used imported cotton (industrial produced) in the past 12 months, 0.3% (18) have occasionally used it during the same period. On the other hand, 66.5% (3,800) have not at all or rarely used. (Fig 34h) Refer Appendix B6.1(b) for details.

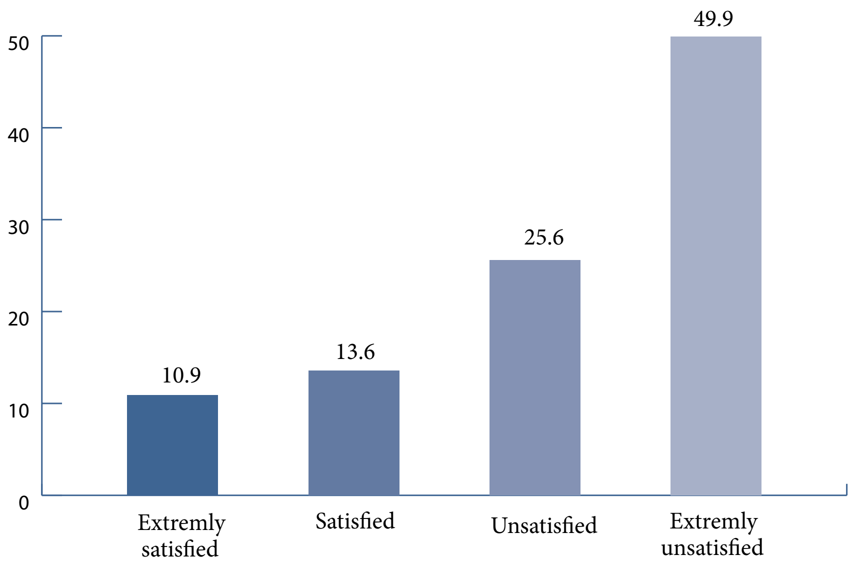
(ii) Satisfaction with the quality of fibre types

Q. How satisfied are you with the quality of this material? Please tick (√) ONE only. [*Extremely unsatisfied/ Unsatisfied/ Satisfied/ Extremely satisfied*]

A. Bhutan – Cotton, Sheep Wool, Yak Wool, Nettle, Others

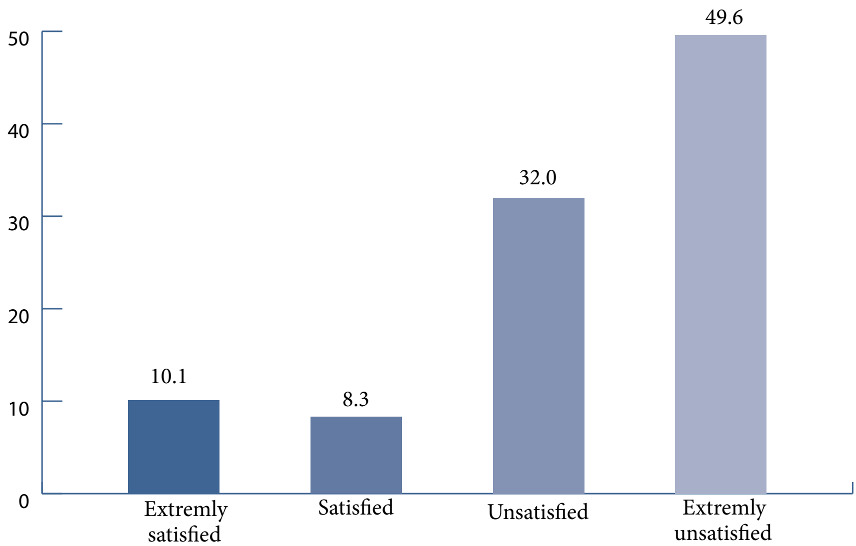
B. Imported – Cotton (Industrial produced), Mercerised cotton (Khaling cotton), Cotton (hand produced), Poly-cotton (Teri-cotton), Reeled or Filament Silk (*Seshu*), Spun Silk (*Bura*), Wool, Acrylic, Others

Figure 35(a): Satisfaction level with the quality of Bhutanese Cotton in the past 12 months (%) (N=715)



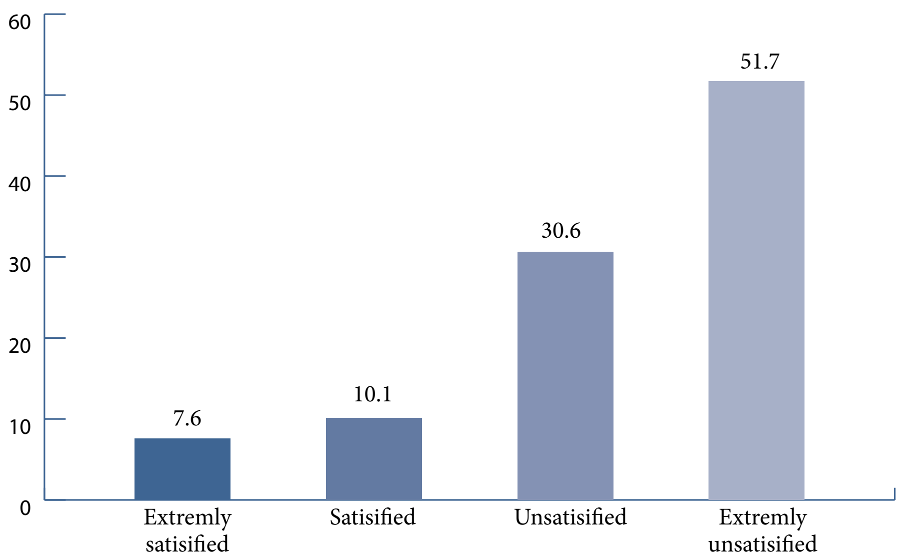
Of those who use Bhutanese cotton, data shows that while 24.5% (175) of the respondents are satisfied with the quality of Bhutanese cotton in the past 12 months, 75.5% (540) are not satisfied with the quality. (Fig 35a) Refer Appendix B6.2(a) for details.

Figure 35(b): Satisfaction level with the quality of Bhutanese Sheep wool in the past 12 months (%) (N=672)



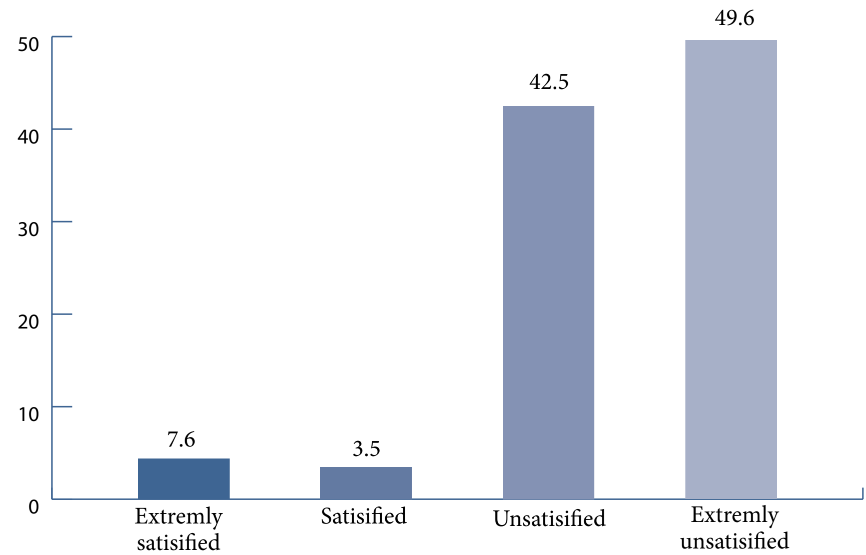
Of those who use Bhutanese sheep wool, data shows that while 18.4% (124) of the respondents are satisfied with the quality of Bhutanese sheep wool in the past 12 months, 81.6% (548) are not satisfied with the quality. (Fig 35b) Refer Appendix B6.2(a) for details.

Figure 35(c): Satisfaction level with the quality of Bhutanese Yak wool in the past 12 months (%) (N=474)



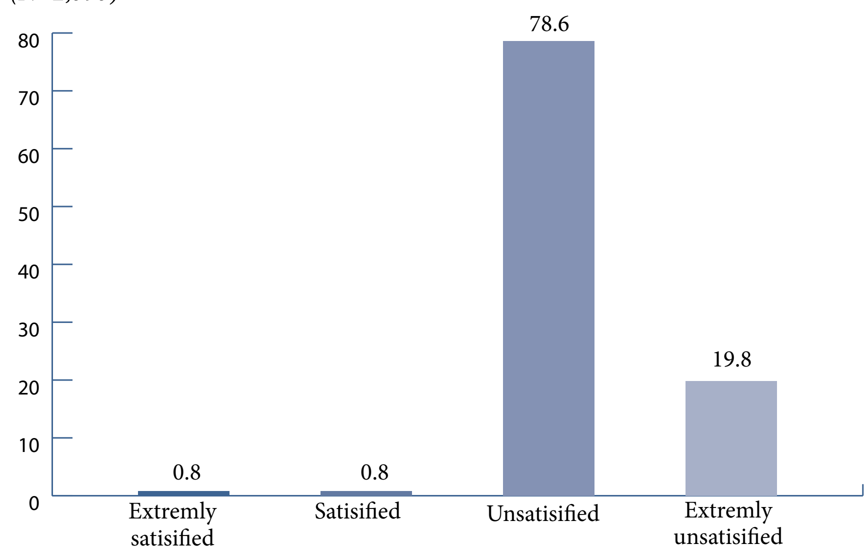
Of those who use Bhutanese yak wool, data shows that while 17.7% (84) of the respondents are satisfied with the quality of Bhutanese yak wool in the past 12 months, 82.3% (380) are not satisfied with the quality. (Fig 35c) Refer Appendix B6.2(a) for details.

Figure 35(d): Satisfaction level with the quality of Bhutanese Nettle fibre in the past 12 months (%) (N=597)



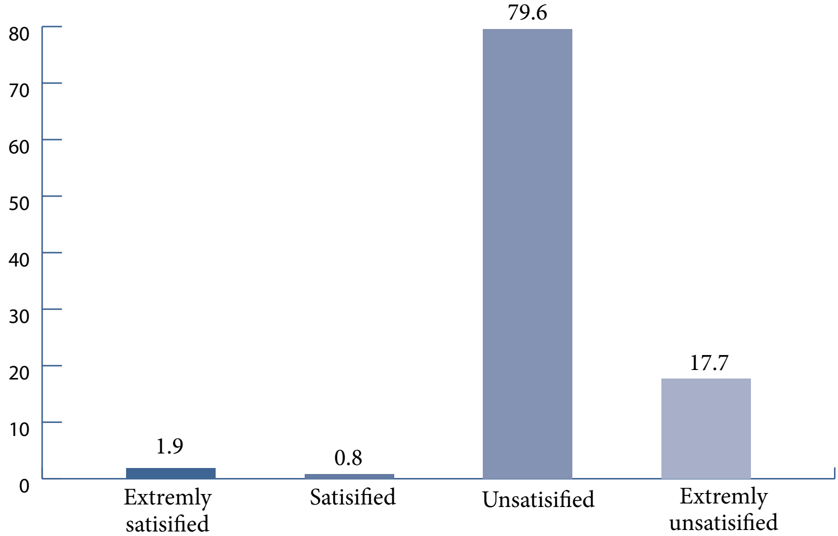
Of those who use Bhutanese nettle fibre, data shows that while 7.9% (47) of the respondents are satisfied with the quality of Bhutanese nettle fibre in the past 12 months, 92.1% (550) are not satisfied with the quality. (Fig 35d) Refer Appendix B6.2(a) for details.

Figure 36(a): Satisfaction level with the quality of imported Cotton (Industrial produced) in the past 12 months (%) (N=2,373)



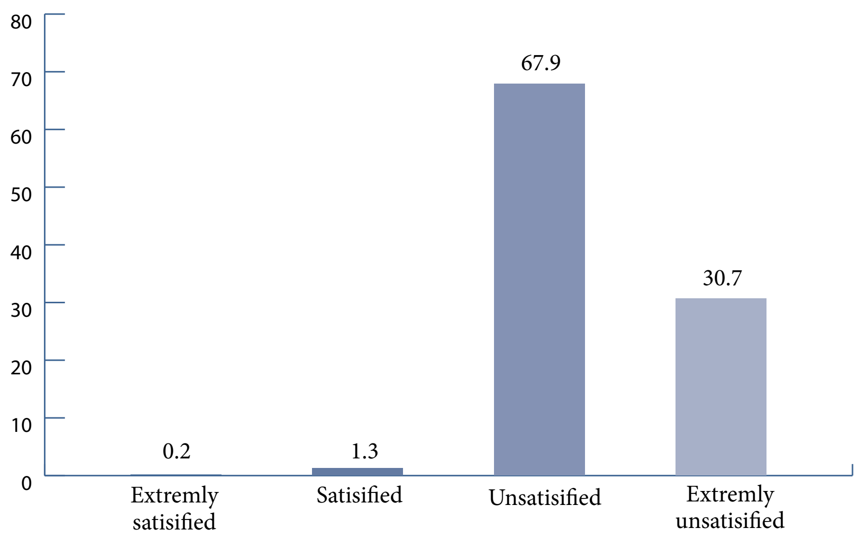
Data shows that while 1.6% (38) of the respondents are satisfied with the quality of imported cotton (industrial produced) in the past 12 months, 98.4% (2,335) are not satisfied with the quality. (Fig 36a) Refer Appendix B6.2(b) for details.

Figure 36(b): Satisfaction level with the quality of imported Mercerised Cotton (Khaling Cotton) in the past 12 months (%) (N=2,373)



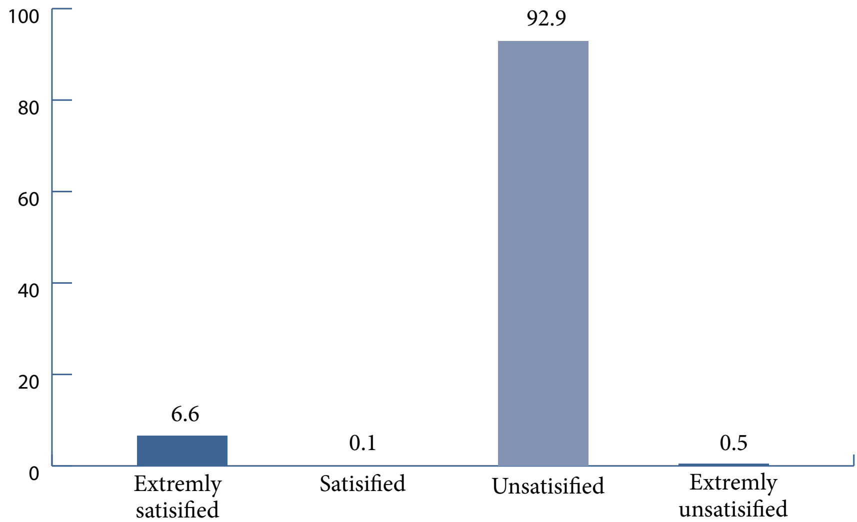
Data shows that while 2.7% (52) of the respondents are satisfied with the quality of imported mercerised cotton (Khaling cotton) in the past 12 months, 97.3% (1,858) are not satisfied with the quality. (Fig 36b) Refer Appendix B6.2(b) for details.

Figure 36(c): Satisfaction level with the quality of imported Cotton (Hand produced) in the past 12 months (%) (N=1,305)



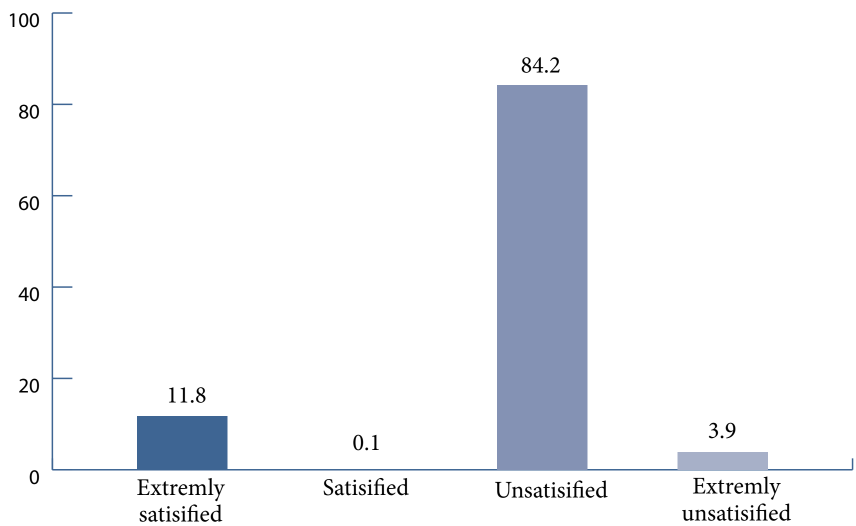
Data shows that while 1.5% (19) of the respondents are satisfied with the quality of imported cotton (hand produced) in the past 12 months, 98.6% (1,286) are not satisfied with the quality. (Fig 36c) Refer Appendix B6.2(b) for details.

Figure 36(d): Satisfaction level with the quality of imported poly-cotton (Teri-cotton) in the past 12 months (%) (N=5,483)



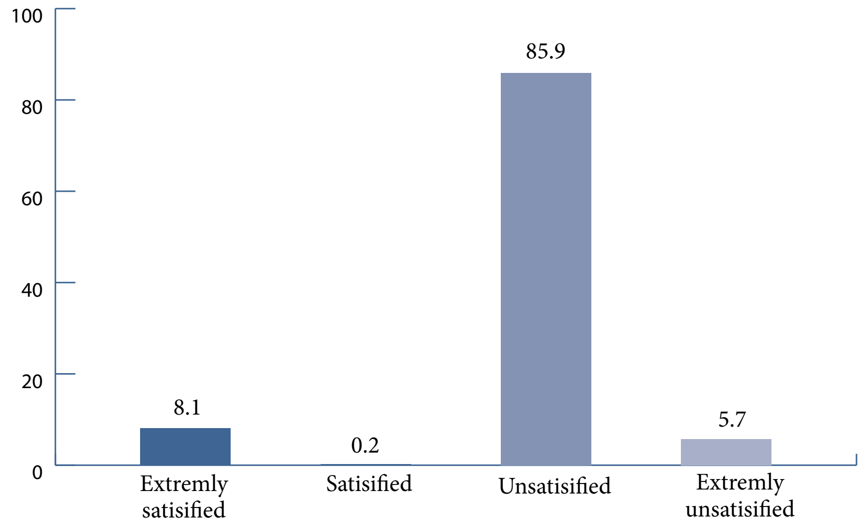
Data shows that while 6.7% (363) of the respondents are satisfied with the quality of imported Poly-cotton (Teri-cotton) in the past 12 months, 93.4% (5,120) are not satisfied with the quality. (Fig 36d) Refer Appendix B6.2(b) for details.

Figure 36(e): Satisfaction level with the quality of imported Reeled or Filaments silk (Seshu) in the past 12 months (%) (N=3,286)



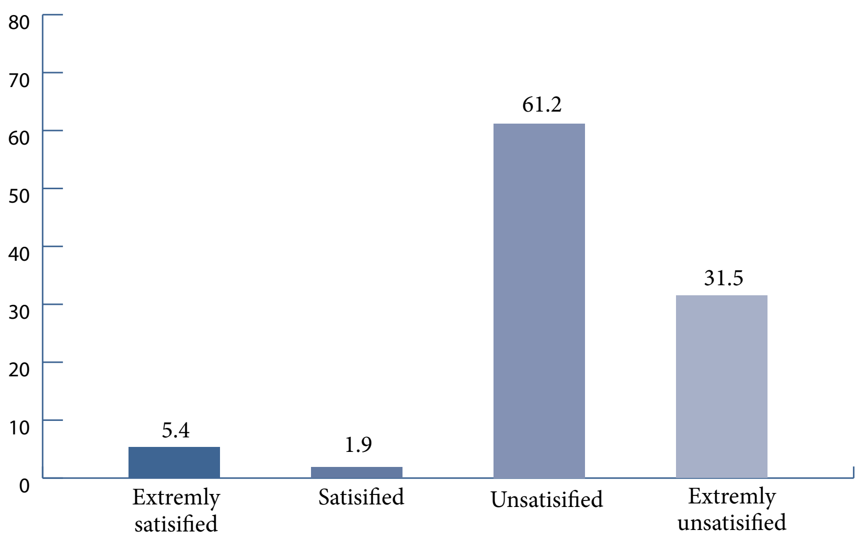
Data shows that while 11.9% (390) of the respondents are satisfied with the quality of imported Reeled or Filament (*Seshu*) in the past 12 months, 88.1% (2,896) are not satisfied with the quality. (Fig 36e) Refer Appendix B6.2(b) for details.

Figure 36(f): Satisfaction level with the quality of imported spun silk (Bura) in the past 12 months (%) (N=3,345)



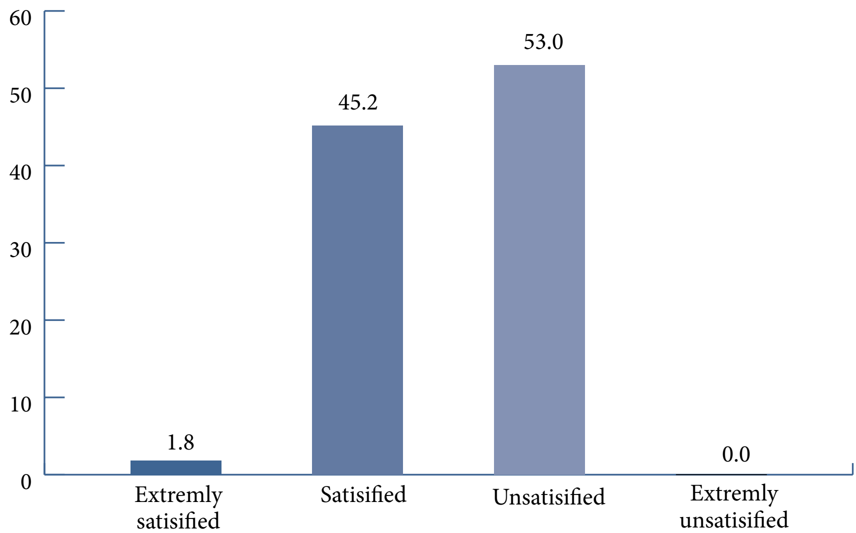
Data shows that while 8.3% (38) of the respondents are satisfied with the quality of imported spun silk (*Bura*) in the past 12 months, 91.6% (3,065) are not satisfied with the quality. (Fig 36f) Refer Appendix B6.2(b) for details.

Figure 36(g): Satisfaction level with the quality of imported wool in the past 12 months (%) (N=998)



Data shows that while 7.3% (73) of the respondents are satisfied with the quality of imported wool in the past 12 months, 92.7% (925) are not satisfied with the quality. (Fig 36g) Refer Appendix B6.2(b) for details.

Figure 36(h): Satisfaction level with the quality of imported Acrylic in the past 12 months (%) (N=866)



Data shows that 47% (409) of the respondents are satisfied with the quality of imported acrylic in the past 12 months and53% (459) are not satisfied with the quality. (Fig 36h) Refer Appendix B6.2(b) for details.

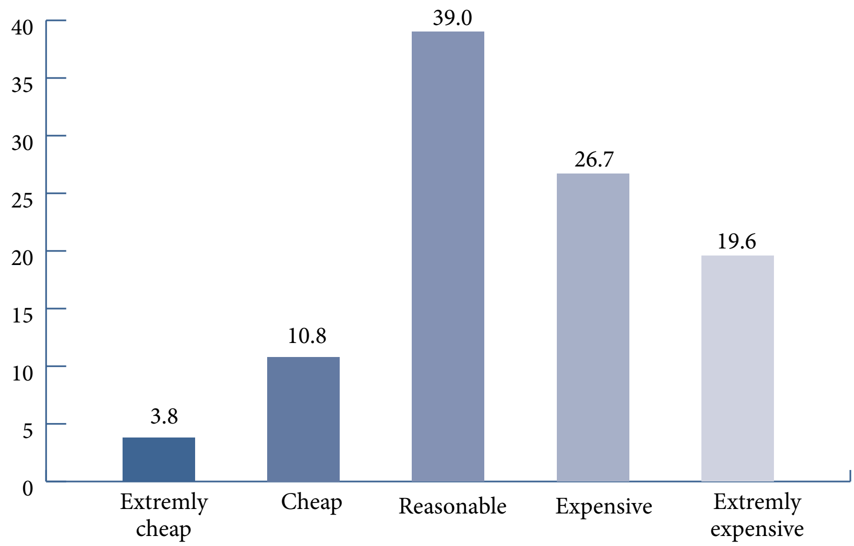
(iii) Current cost by fibre types

Q. How do you feel about the current cost of this material? Please tick (√) ONE only. [*Extremely Cheap/ Cheap/ Reasonable/ Expensive/ Extremely Expensive*]

A. Bhutan – Cotton, Sheep Wool, Yak Wool, Nettle, Others

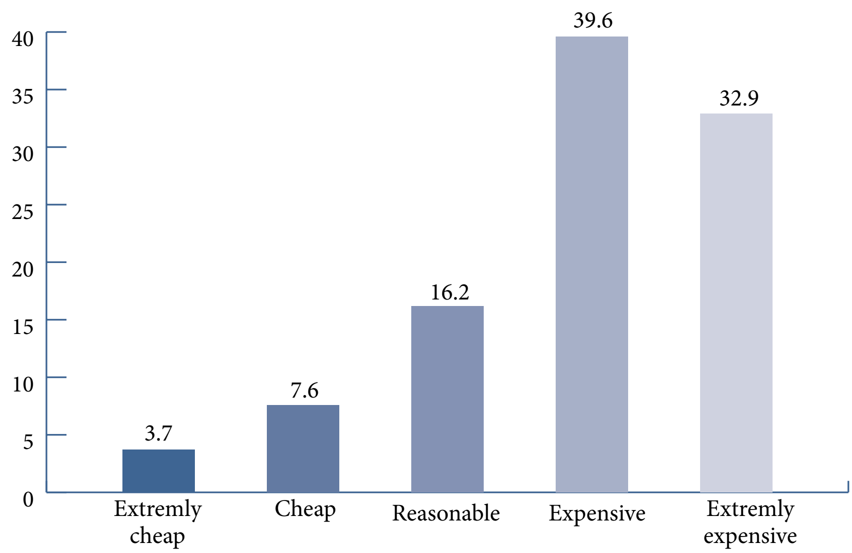
B. Imported – Cotton (Industrial produced), Mercerised cotton (Khaling cotton), Cotton (hand produced), Poly-cotton (Teri-cotton), Reeled or Filament Silk (*Seshu*), Spun Silk (*Bura*), Wool, Acrylic, Others

Figure 37(a): Opinion on the current cost of traditional Bhutanese Cotton (%) (N=572)



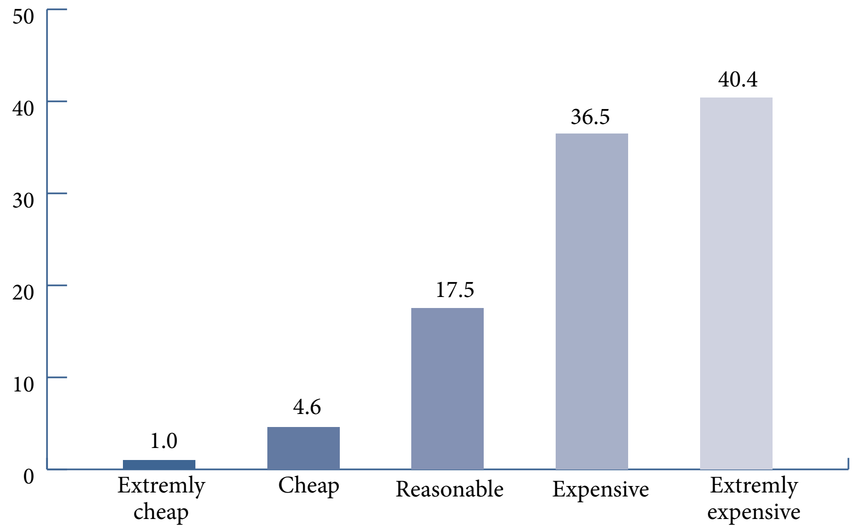
Of those who use traditional Bhutanese cotton, data indicates that while 53.6% (307) of the respondents view the current cost of the traditional Bhutanese cotton either cheap or reasonable, 46.3% (265) found it expensive. (Fig 37a) Refer Appendix B6.3(a) for details.

Figure 37(b): Opinion on the current cost of traditional Bhutanese Sheep Wool (%) (N=572)



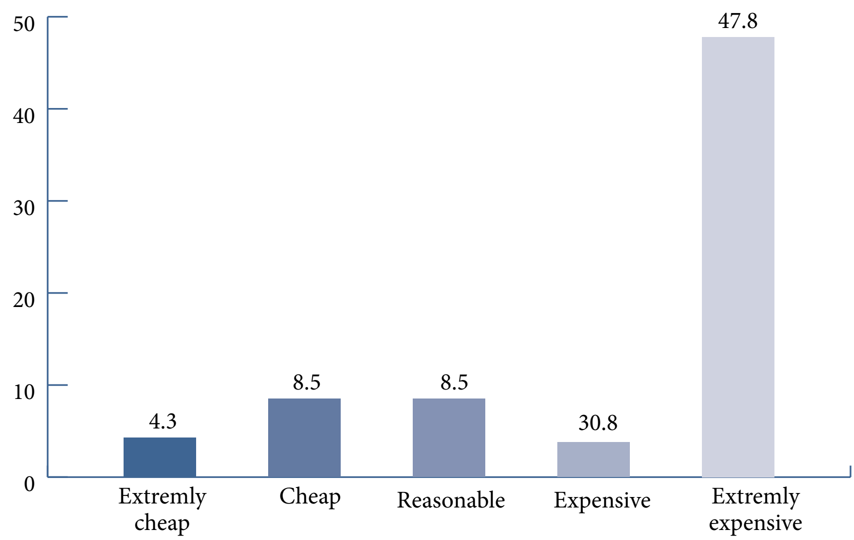
Of those who use Bhutanese sheep wool, data indicates that while 27.5% (127) of the respondents view the current cost of the Bhutanese sheep wool as either cheap or reasonable, 72.5% (335) view it as expensive. (Fig 37b) Refer Appendix B6.3(a) for details.

Figure 37(c): Opinion on the current cost of traditional Bhutanese Yak Wool (%) (N=572)



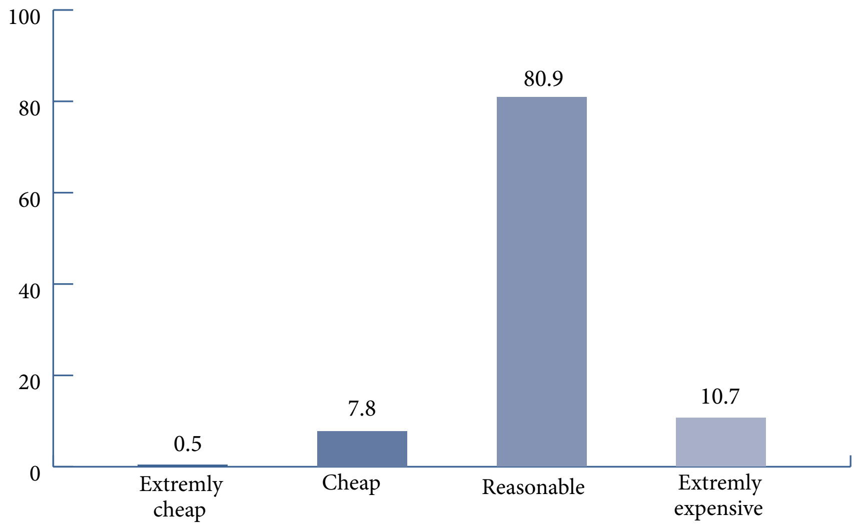
Of those who use Bhutanese Yak wool, data indicates that while 23.1% (116) of the respondents view the current cost of the Bhutanese Yak wool as either cheap or reasonable, 76.9% (386) view it as expensive. (Fig 37c) Refer Appendix B6.3(a) for details.

Figure 37(d): Opinion on the current cost of traditional Bhutanese Nettle fibre (%) (N=529)



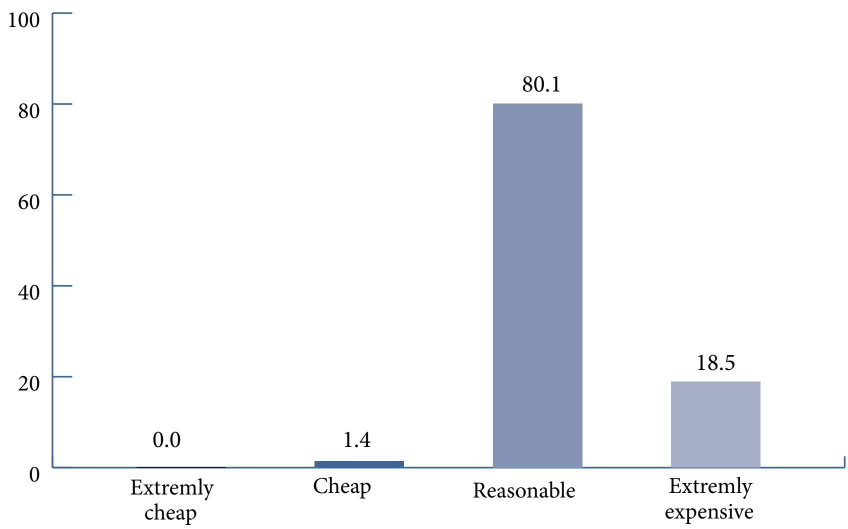
Of those who use Bhutanese nettle fibre, data indicates that while 21.3% (113) of the respondents view the current cost of the Bhutanese nettle fibre as either cheap or reasonable, 78.6% (416) view it as expensive. (Fig 37d) Refer Appendix B6.3(a) for details.

Figure 38(a): Opinion on the current cost of imported Cotton (Industrial produced) (%) (N=2,376)



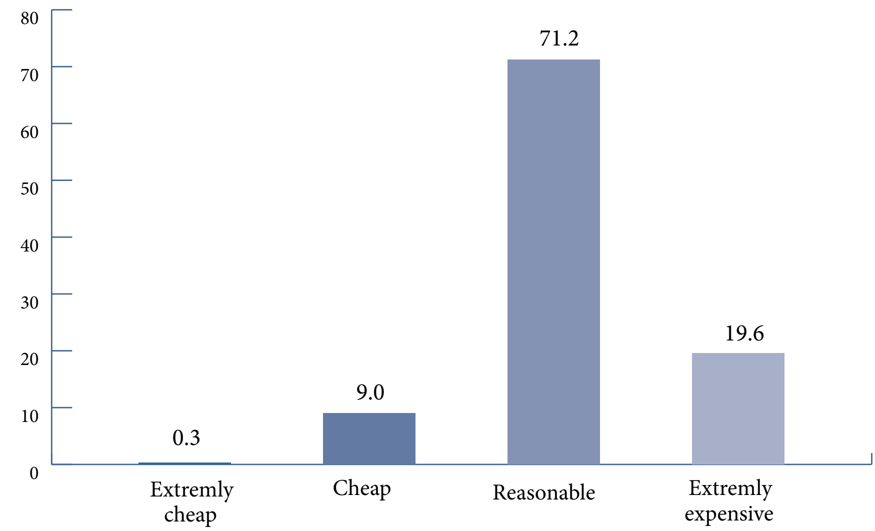
Data indicates that while 89.2% (2,122) of the respondents view the current cost of imported cotton (industrial produced) as either cheap or reasonable, 10.7% (254) view it as expensive. (Fig 38a) Refer Appendix B6.3(b) for details.

Figure 38(b): Opinion on the current cost of imported Mercerised Cotton (Khaling Cotton) (%) (N=1,874)



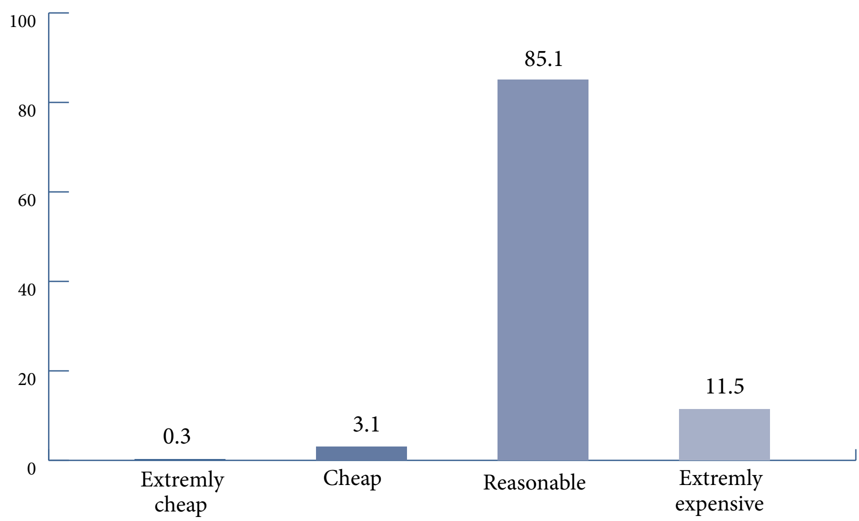
Data indicates that while 81.5% (1,527) of the respondents view the current cost of the imported mercerised cotton (Khaling cotton) either cheap or reasonable, 18.5% (347) view it as expensive. (Fig 38b) Refer Appendix B6.3(b) for details.

Figure 38(c): Opinion on the current cost of imported Cotton (Hand produced) (%) (N=1,293)



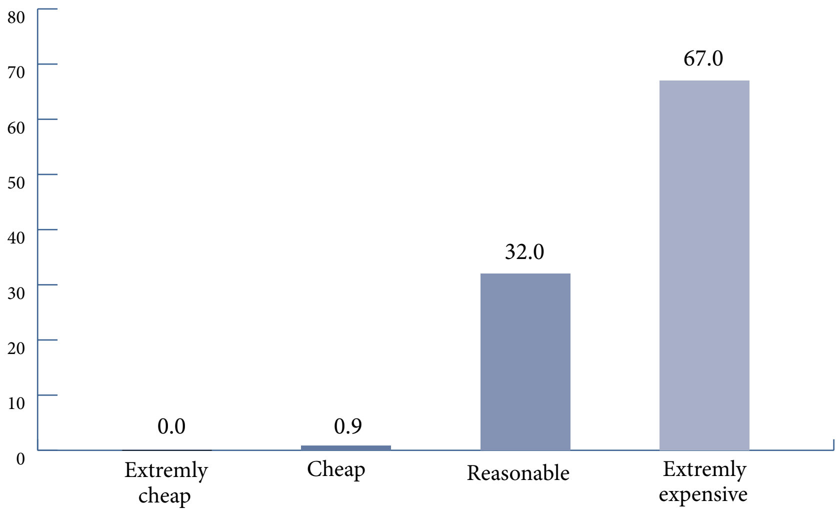
Data indicates that while 80.5% (1,040) of the respondents view the current cost of the imported cotton (hand produced) either cheap or reasonable, 19.6% (253) view it as expensive. (Fig 38c) Refer Appendix B6.3(b) for details.

Figure 38(d): Opinion on the current cost of imported Poly-cotton (Teri cotton) (%) (N=5,395)



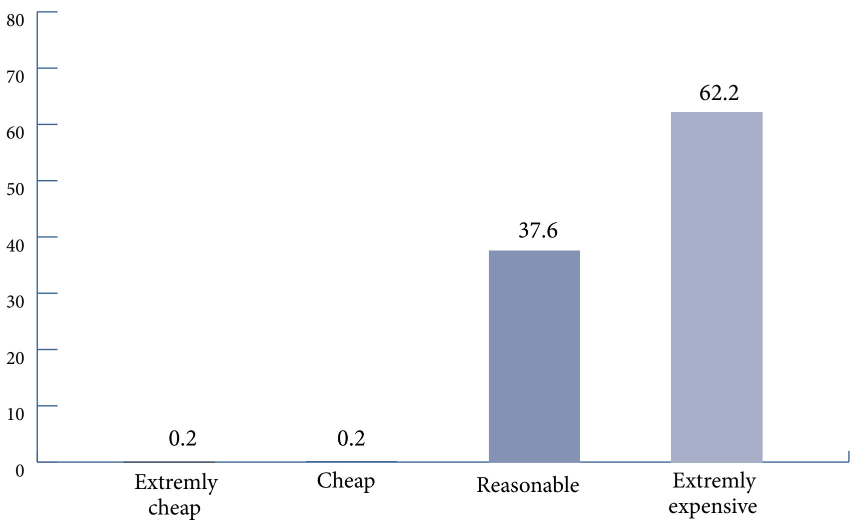
Data indicates that while 88.5% (4,773) of the respondents view the current cost of the imported Poly-cotton (Teri-cotton) either cheap or reasonable, 11.5% (622) view it as expensive. (Fig 38d) Refer Appendix B6.3(b) for details.

Figure 38(e): Opinion on the current cost of imported Reeled or Filament Silk (Seshu) (%) (N=5,395)



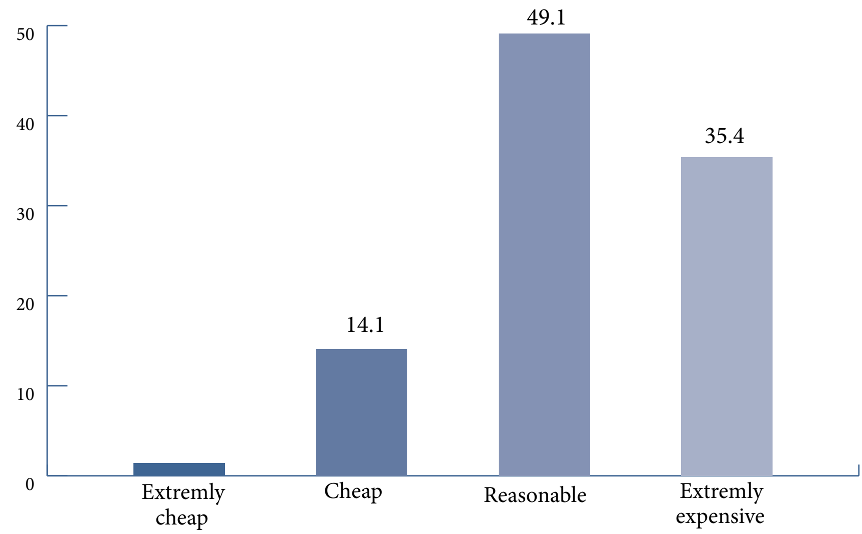
Data indicates that while 32.9% (1,081) of the respondents view the current cost of the imported Reeled or Filament Silk (*Seshu*) as either cheap or reasonable, 67% (2,194) view it as expensive. (Fig 38e) Refer Appendix B6.3(b) for details.

Figure 38(f): Opinion on the current cost of imported Spun Silk (%) (N=3,359)



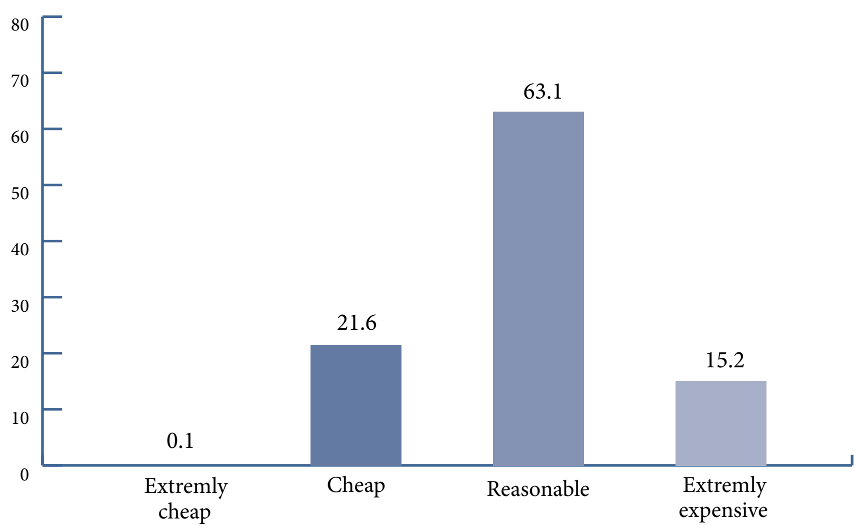
Data indicates that while 37.8% (1,271) of the respondents view the current cost of the imported Spun Silk (*Bura*) as either cheap or reasonable, 62.2% (2,088) view it as expensive. (Fig 38f) Refer Appendix B6.3(b) for details.

Figure 38(g): Opinion on the current cost of imported wool (%) (N=943)



Data indicates that while 64.6% (609) of the respondents view the current cost of the imported wool as either cheap or reasonable, 35.4% (334) view it as expensive. (Fig 38g) Refer Appendix B6.3(b) for details.

Figure 38(h): Opinion on the current cost of imported Acrylic (%) (N=804)



Data collected shows that while 84.8% (682) of the respondents view the current cost of imported acrylic as either cheap or reasonable, 15.2% (122) view it as expensive. (Fig 38h) Refer Appendix B6.3 (b) for details.

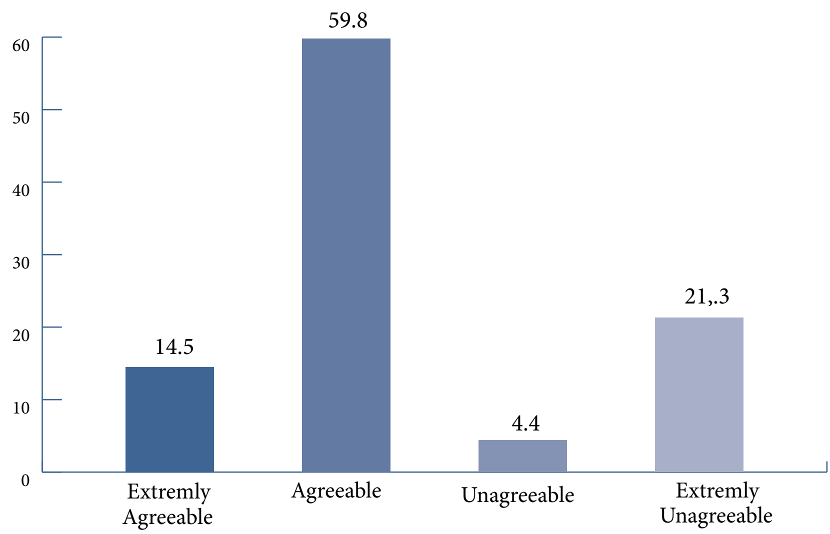
(iv) Cost-Quality Relationship by fibre types

Q. What do you think about the value (in terms of cost and quality relationship) of this material? Please tick (√) ONE only. [*Extremely Unagreeable/ Unagreeable/ Agreeable/ Extremely Unagreeable*]

A. Bhutan – Cotton, Sheep Wool, Yak Wool, Nettle, Others

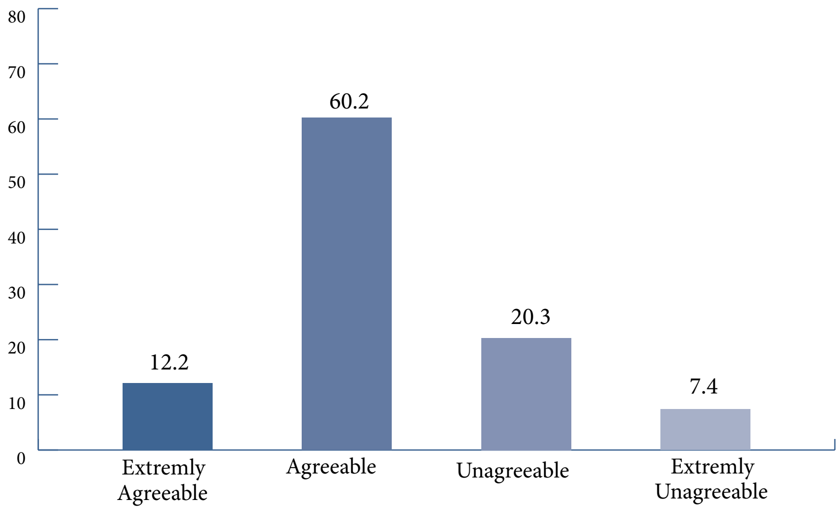
B. Imported – Cotton (Industrial produced), Mercerised cotton (Khaling cotton), Cotton (hand produced), Poly-cotton (Teri-cotton), Reeled or Filament Silk (*Seshu*), Spun Silk (*Bura*), Wool, Acrylic, Others

Figure 39(a): Opinion on the Cost-Quality relationship for the traditonal Bhutanese Cotton (%) (N=572)



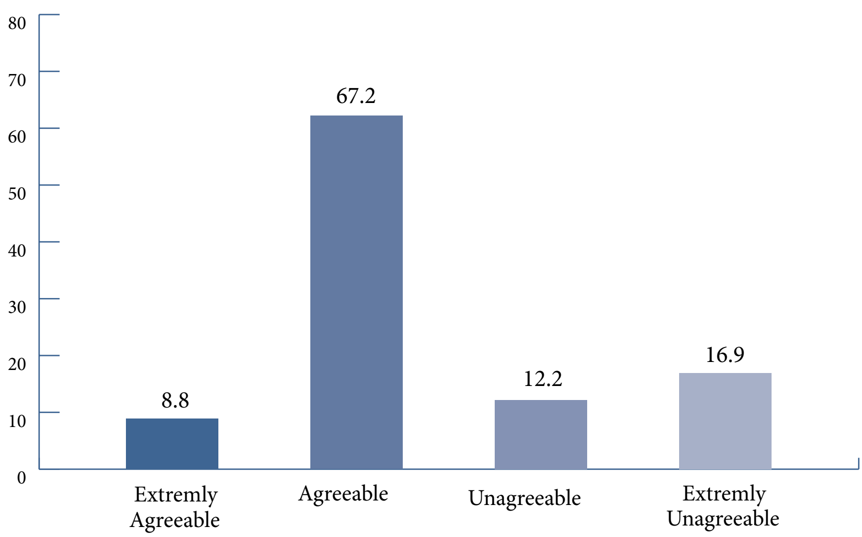
Of those who use traditional Bhutanese cotton, data shows that while 74.3% (425) opine that the cost-quality relationship for the traditional Bhutanese cotton is agreeable, 25.7% (147) are not agreeable to the cost-quality relationship. (Fig 39a) Refer Appendix B6.4(a) for details.

Figure 39(b): Opinion on the Cost-Quality relationship for the traditonal Bhutanese Sheep Wool (%) (N=462)



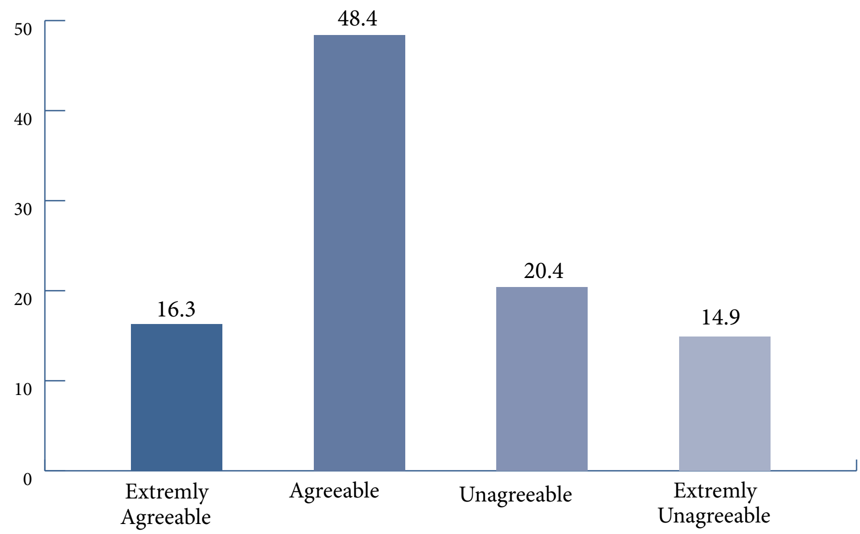
Of those who use traditional Bhutanese sheep wool, data shows that while 72.3% (334) of the respondents opine that the cost-quality relationship for the Bhutanese sheep wool is agreeable, 27.7% (128) are not agreeable to the cost-quality relationship. (Fig 39b) Refer Appendix B6.4(a) for details.

Figure 39(c): Opinion on the Cost-Quality relationship for the traditonal Bhutanese Yak Wool (%) (N=502)



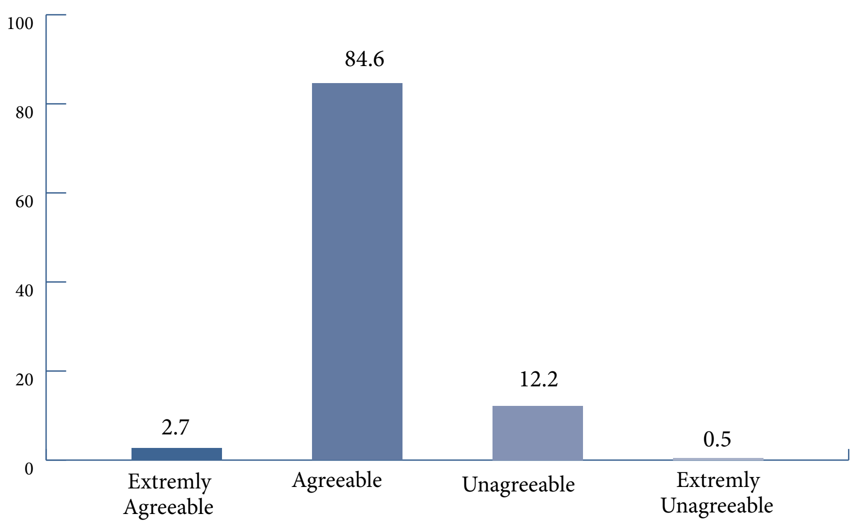
Of those who use traditional Bhutanese yak wool, data shows that while 71% (356) of the respondents opine that the cost-quality relationship for the Bhutanese yak wool is agreeable, 29.1% (146) are not agreeable to the cost-quality relationship. (Fig 39c) Refer Appendix B6.4(a) for details.

Figure 39(d): Opinion on the Cost-Quality relationship for the traditonal Bhutanese Nettle fibre (%) (N=529)



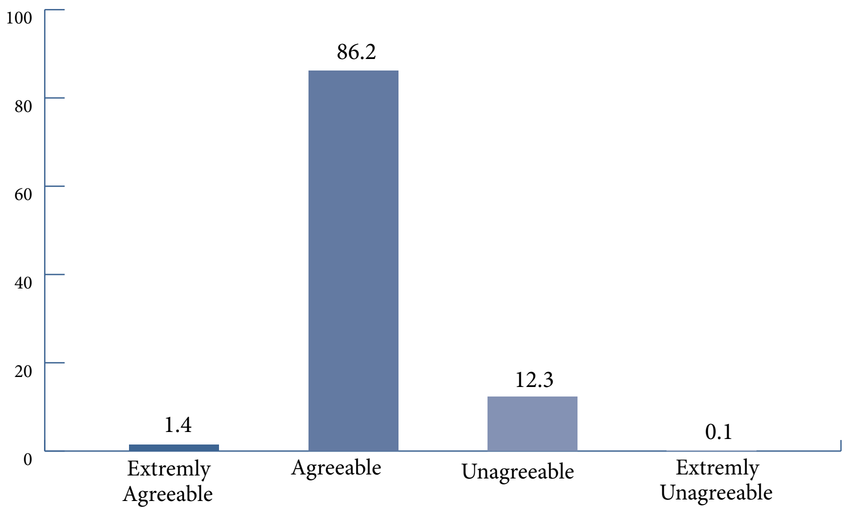
Of the respondents who use the traditional Bhutanese nettle fibre, data shows that while 64.7% (342) of the respondents opine that the cost-quality relationship for the Bhutanese nettle fibre is agreeable, 35.3% (187) are not agreeable to the cost-quality relationship. (Fig 39d) Refer Appendix B6.4(a) for details.

Figure 40(a): Opinion on the Cost-Quality relationship for the imported Cotton (Industrial produced) (%) (N=2,356)



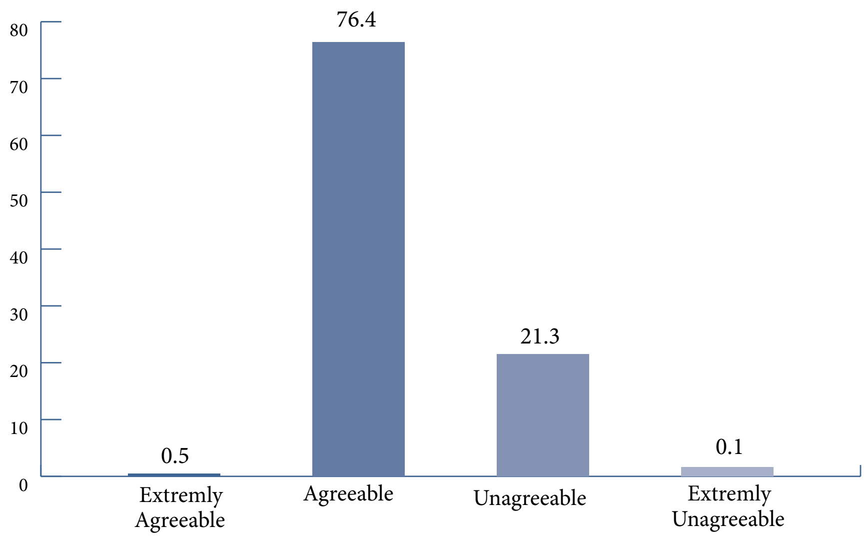
Data shows that 87.3% (2,057) of the respondents opine that the cost-quality relationship for imported cotton (industrial produced) is agreeable.12.7% (299) said they are not agreeable to the cost-quality relationship. (Fig 40a) Refer Appendix B6.4(b) for details.

Figure 40(b): Opinion on the Cost-Quality relationship for the imported Mercerised Cotton (Khaling Cotton) (%) (N=1,884)



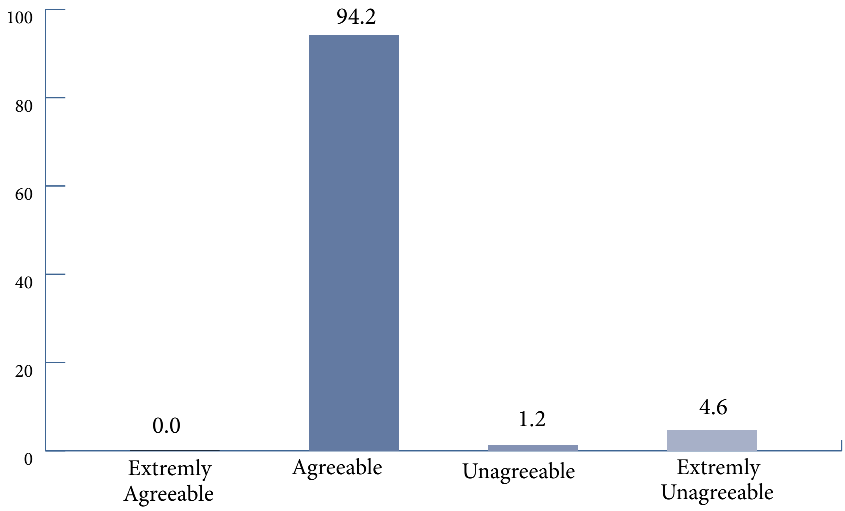
While 87.6% (1,650) of the respondents opine that the cost-quality relationship for the imported mercerised cotton (Khaling cotton) is agreeable, 12.4% (234) do not agree to the cost-quality relationship. (Fig 40b) Refer Appendix B6.4(b) for details.

Figure 40(c): Opinion on the Cost-Quality relationship for the imported Cotton (Hand produced) (%) (N=1,265)



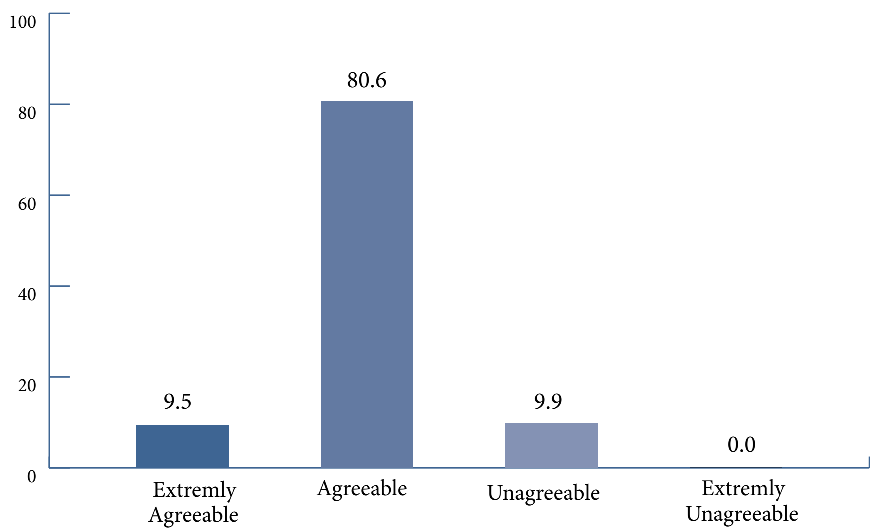
Data shows that while 76.9% (973) of the respondents opine that the cost-quality relationship for the imported cotton (hand produced) is agreeable, 23.1% (292) are not agreeing to the cost-quality relationship. (Fig 40c) Refer Appendix B6.4(b) for details.

Figure 40(d): Opinion on the Cost-Quality relationship for imported Poly-cotton (Teri-cotton) (%) (N=5,391)



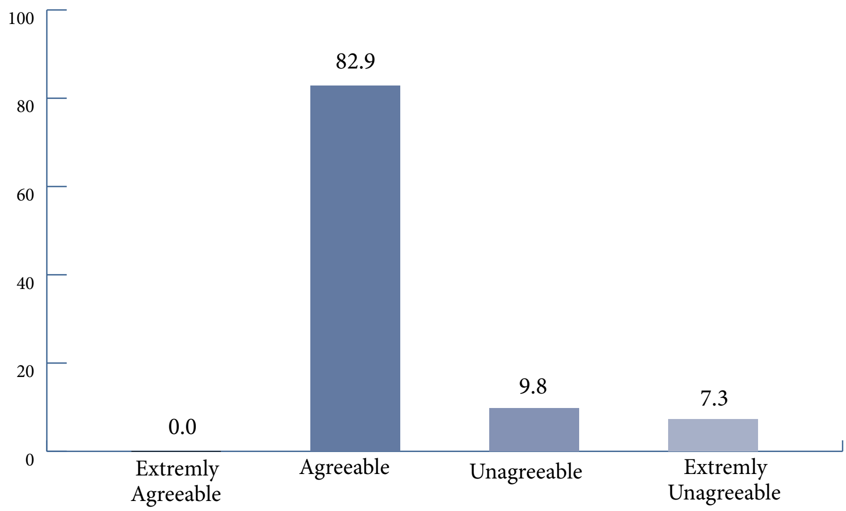
Data shows that while 94.2% (5,080) of the respondents opine that the cost-quality relationship for the imported poly-cotton (Teri-cotton) is agreeable, 5.8% (311) are not agreeable to the cost-quality relationship. (Fig 40d) Refer Appendix B6.4(b) for details.

Figure 40(e): Opinion on the Cost-Quality relationship for imported Reeled or Filament Silk (Seshu) (%) (N=3,238)



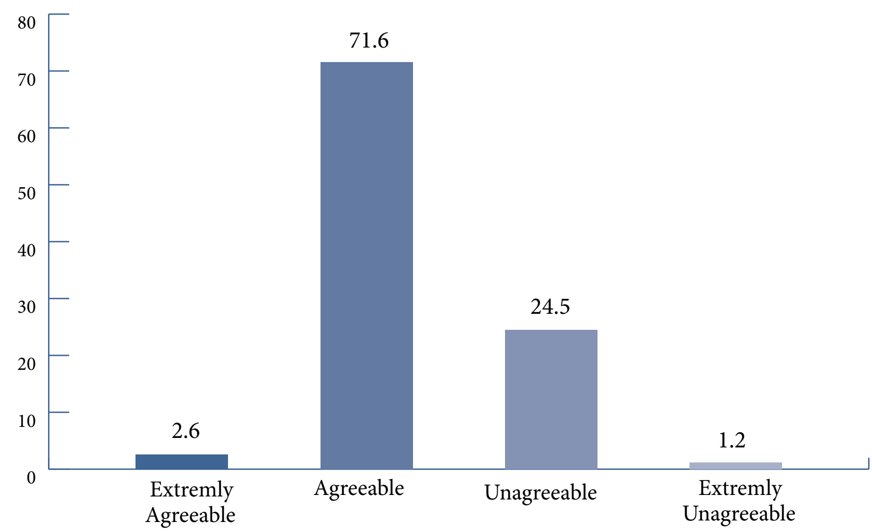
Data shows that while 90.1% (2,917) of the respondents opined that the cost-quality relationship for the imported Reeled or Filament (*Seshu*) is agreeable, 9.9% (321) are not agreeable to the cost-quality relationship. (Fig 40e) Refer Appendix B6.4(b) for details.

Figure 40(f): Opinion on the Cost-Quality relationship for imported Spun Silk (Bura) (%) (N=3,365)



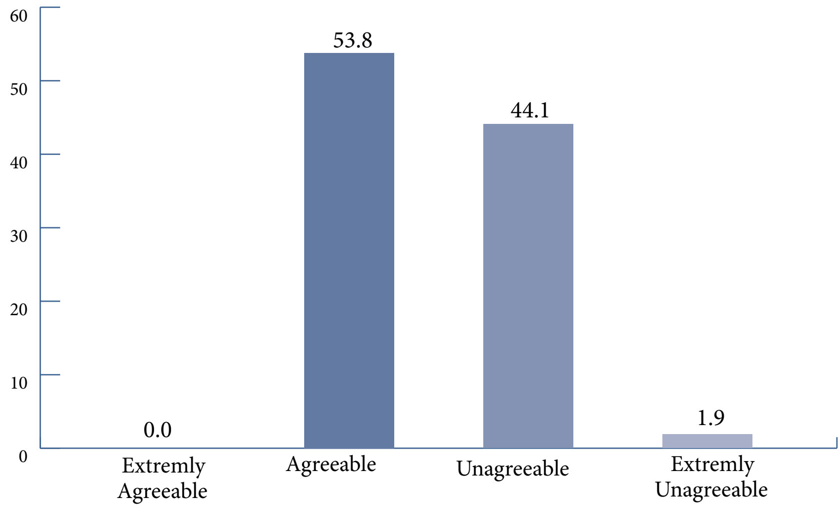
While 82.9% (2,791) of the respondents opine that the cost-quality relationship for the imported spun silk (*Bura*) is agreeable, 17.1% (574) are not agreeable to the cost-quality relationship. (Fig 40f) Refer Appendix B6.4(b) for details.

Figure 40(g): Opinion on the Cost-Quality relationship for imported Wool (%) (N=966)



Data shows that while 74.2% (717) of the respondents opine that the cost-quality relationship for imported wool is agreeable, 25.7% (249) are not agreeable to the cost-quality relationship. (Fig 40g) Refer Appendix B6.4(b) for details.

Figure 40(h): Opinion on the Cost-Quality relationship for imported Acrylic (%) (N=823)

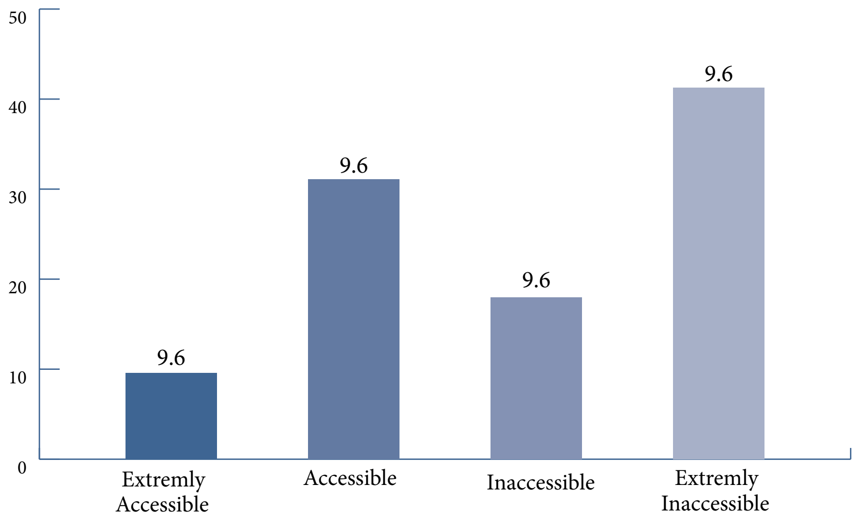


Data shows that while 53.9% (444) of the respondents opine that the cost-quality relationship for imported acrylic is agreeable, 46% (379) are not agreeable to the cost-quality relationship. (Fig 40h) Refer Appendix B6.4(b) for details.

(v) Accessibility to fibre types

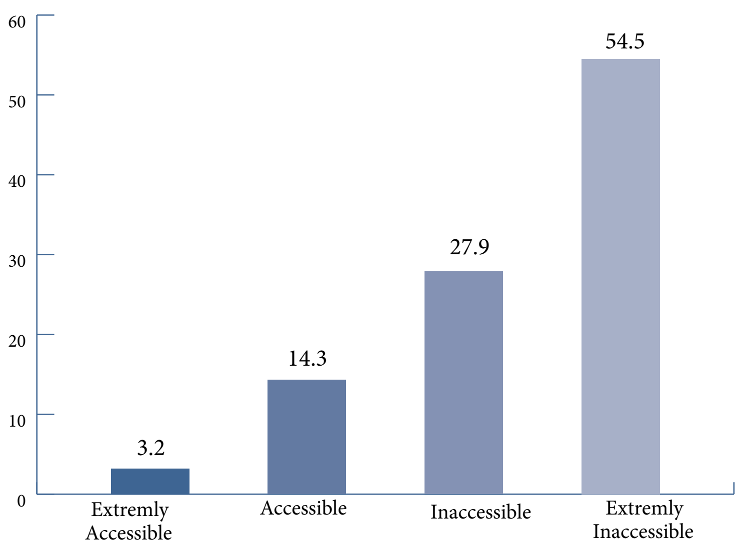
Q. Is it difficult for you to access this material? Please tick (√) ONE only. [*Extremely Inaccessible/ Inaccessible/ Accessible/ Extremely Accessible*]
A. Bhutan – Cotton, Sheep Wool, Yak Wool, Nettle, Others
B. Imported – Cotton (Industrial produced), Mercerised cotton (Khaling cotton), Cotton (hand produced), Poly-cotton (Teri-cotton), Reeled or Filament Silk (*Seshu*), Spun Silk (*Bura*), Wool, Acrylic, Others

Figure 41(a): Accessibility traditional Bhutanese cotton (%) (N=572)



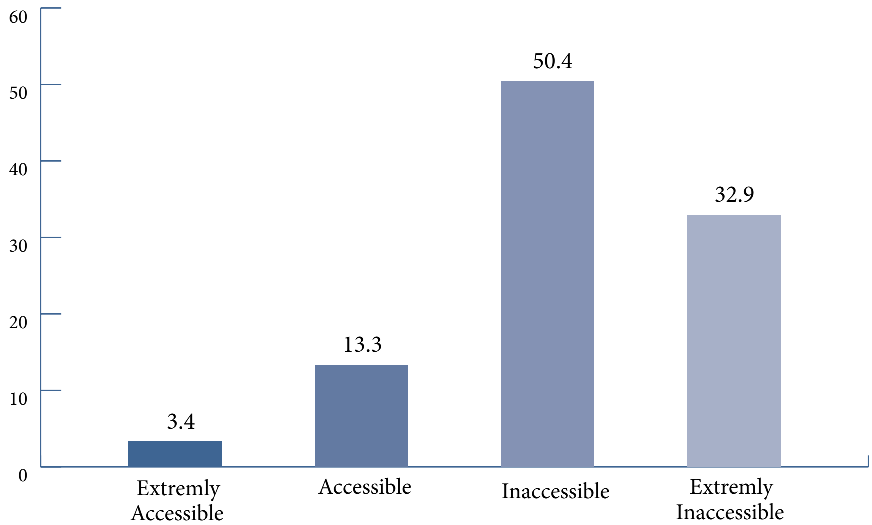
Of those who use traditional Bhutanese cotton, data indicates that while 40.7% (233) of the respondents expressed having no difficulties in accessing traditional Bhutanese cotton, 59.3% (339) of the respondents have expressed difficulties. (Fig 41a) Refer Appendix B6.5(a) for details.

Figure 41(b): Accessibility Bhutanese Sheep Wool (%) (N=462)



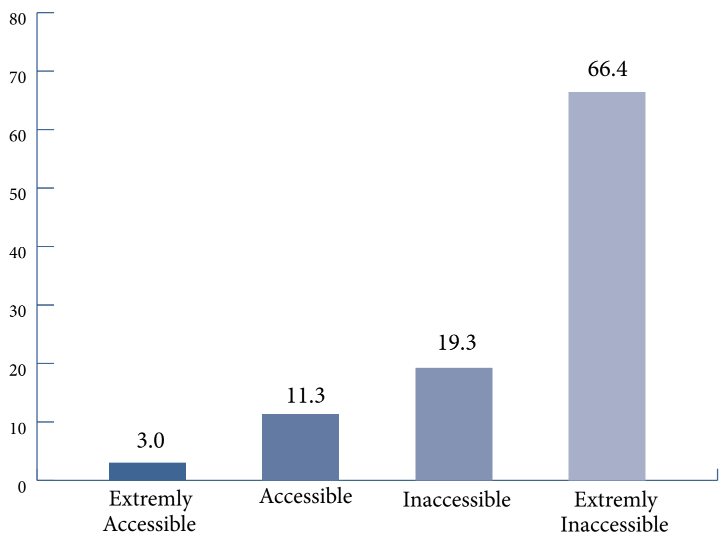
Of those who use traditional Bhutanese sheep wool, data indicates that while 17.5% (81) of the respondents expressed having no difficulties in accessing Bhutanese sheep wool, 82.4% (389) of the respondents have expressed difficulties. (Fig 41b) Refer Appendix B6.5(a) for details.

Figure 41(c): Accessibility Bhutanese Yak Wool (%) (N=502)



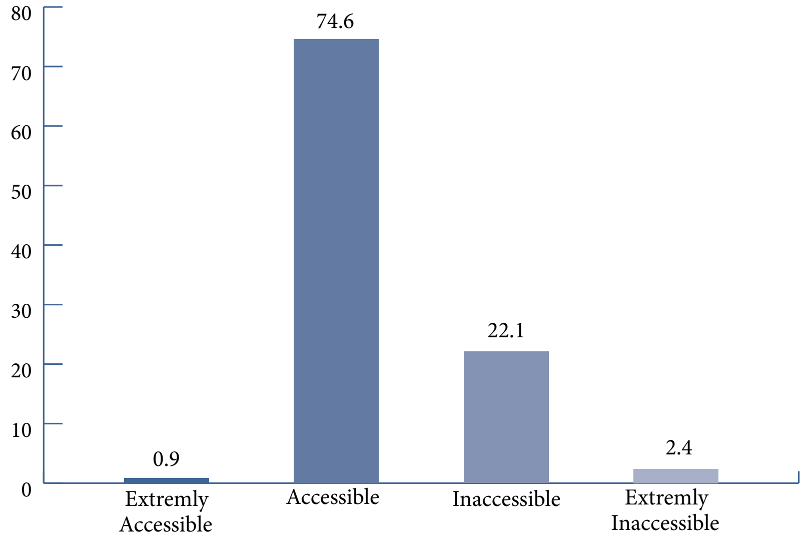
Data indicates that while 16.7% (84) of the respondents expressed having no difficulties in accessing Bhutanese yak wool, 83.3% (418) of the respondents have expressed difficulties. (Fig 41c) Refer Appendix B6.5(a) for details.

Figure 41(d): Accessibility of Bhutanese Nettle fibre (%) (Na529)



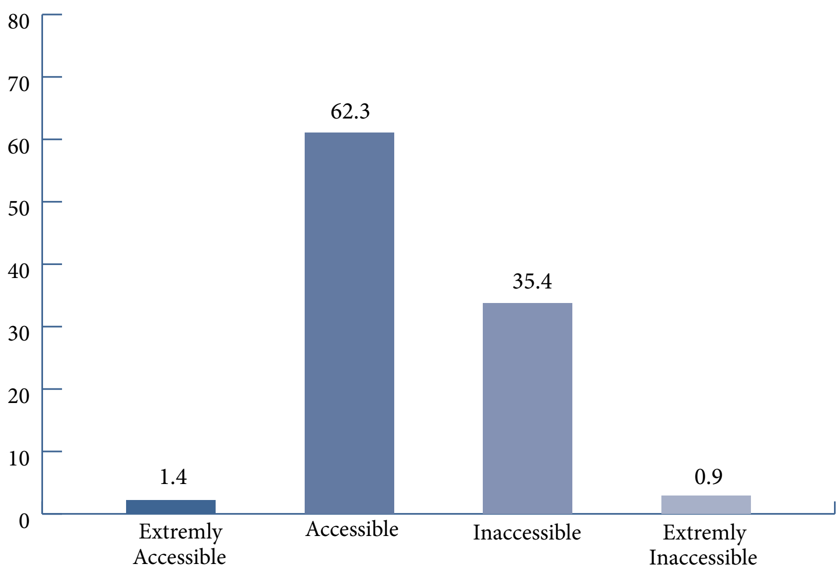
Of those who use traditional Bhutanese nettle fibre, data indicates that while 14.3% (76) of the respondents expressed having no difficulties in accessing Bhutanese nettle fibre. However, 85.7% (453) of the respondents have expressed difficulties. (Fig 41d) Refer Appendix B6.5(a) for details.

Figure 42(a): Accessibility imported Cotton (Industrail produced) (%) (N=2,407)



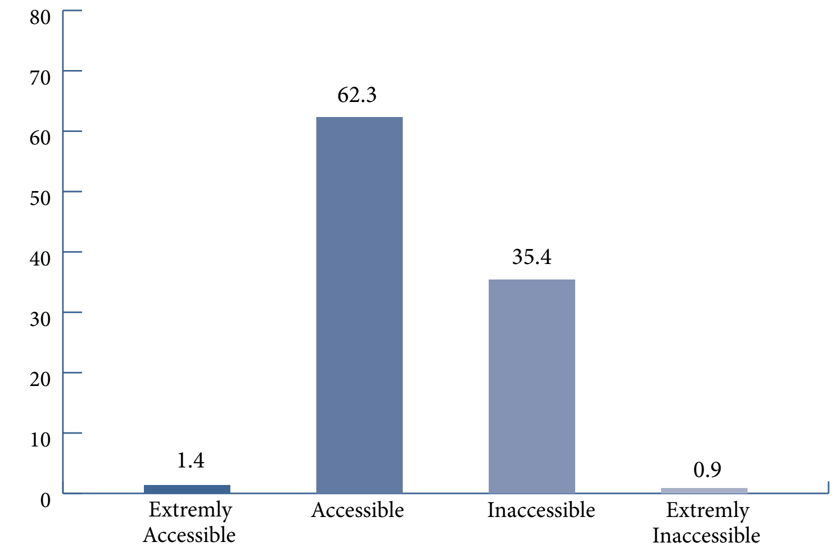
Data indicates that 75.5% (1,817) of the respondents didn't have difficulties in accessing imported cotton (industrial produced), while24.5% (590) expressed difficulties. (Fig 42a) Refer Appendix B6.5(b) for details.

Figure 42(b): Accessibility Imported Mercerised Cotton (Khaling Cotton) (%) (N=1,899)



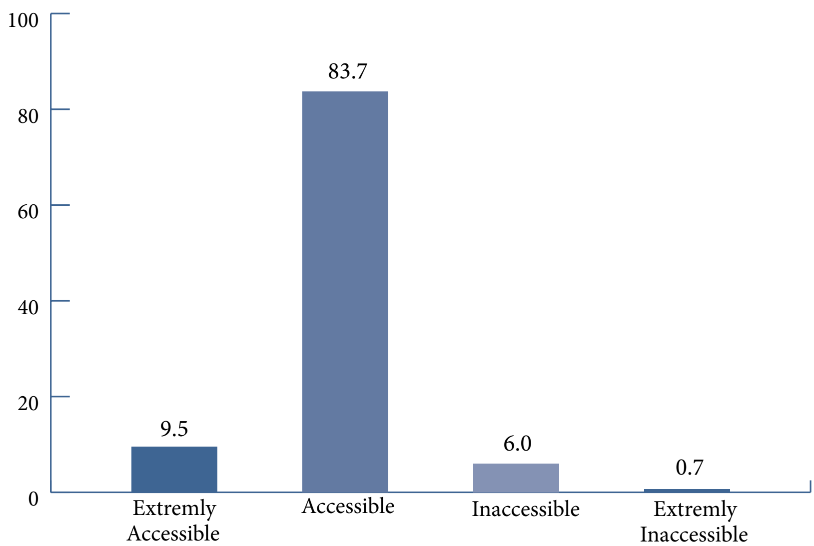
Data indicates that while 63.3% (1,202) of the respondents expressed having no difficulties in accessing imported mercerised cotton (Khaling cotton), 36.7% (697) of the respondents have expressed difficulties. (Fig 42b) Refer Appendix B6.5(b) for details.

Figure 42(c): Accessibility Imported Cotton (Hand produced) (%) (N=1,313)



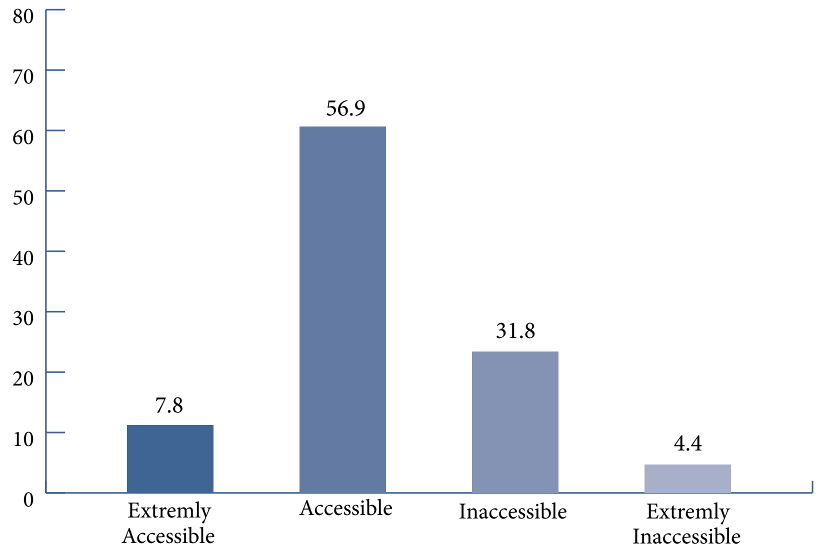
Data indicates that while 63.7% (836) of the respondents expressed having no difficulties in accessing imported cotton (hand produced), 36.3% (477) of the respondents have expressed difficulties. (Fig 42c) Refer Appendix B6.5(b) for details.

Figure 42(d): Accessibility Imported Poly-cotton (Teri-cotton) (%) (N=5,384)



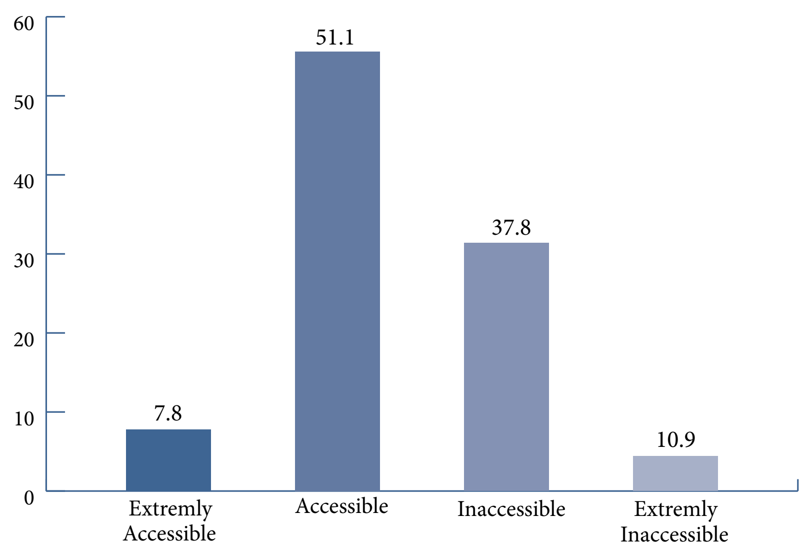
Data indicates that while 93.2% (5,023) of the respondents expressed having no difficulties in accessing imported poly-cotton (Teri-cotton), 6.7% (361) of the respondents have expressed difficulties. (Fig 42d) Refer Appendix B6.5(b) for details.

Figure 42(e): Accessibility Imported Reeled or Filament Silk (Seshu) (%) (N=3,252)



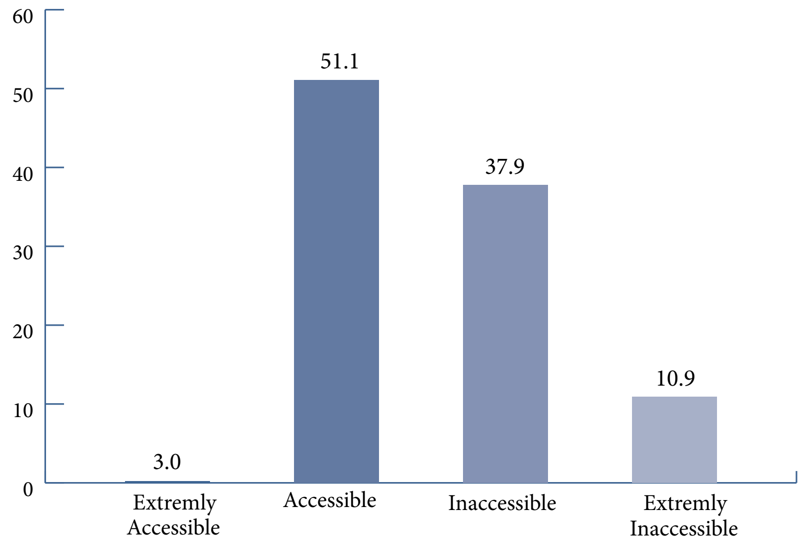
Data indicates that while 71.9% (2,337) of the respondents expressed having no difficulties in accessing imported reeled or filament (*Seshu*), 28.1% (915) of the respondents have expressed difficulties. (Fig 42e) Refer Appendix B6.5(b) for details.

Figure 42(f): Accessibility Imported Spun Silk (Bura) (%) (N=3,360)



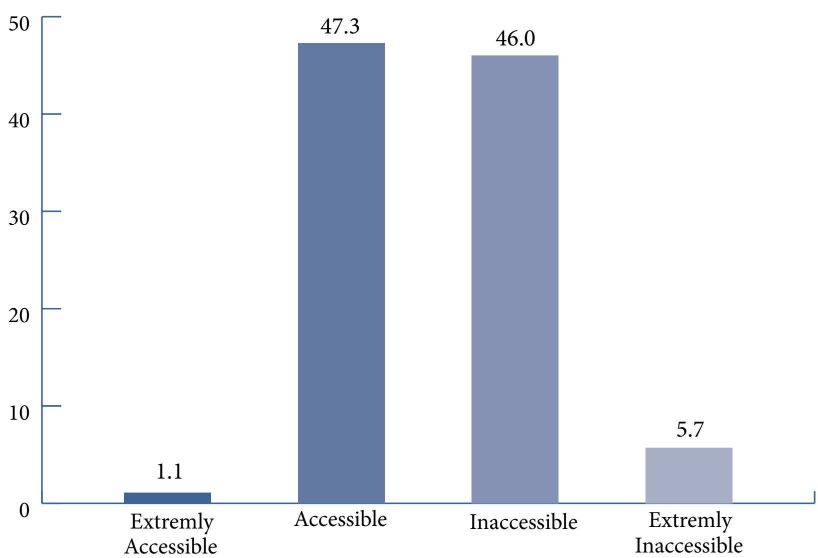
Data indicates that while 63.7% (2,142) of the respondents expressed having no difficulties in accessing imported spun silk (*Bura*), 36.2% (1,218) of the respondents have expressed difficulties. (Fig 42f) Refer Appendix B6.5(b) for details.

Figure 42(g): Accessibility to Imported Wool (%))N=1,079)



Data indicates that while 51.3% (553) of the respondents expressed having no difficulties in accessing imported wool, 48.7% (526) of the respondents have expressed difficulties. (Fig 42g) Refer Appendix B6.5(b) for details.

Figure 42(h): Accessibility Imported Acrylic (%) (N=920)



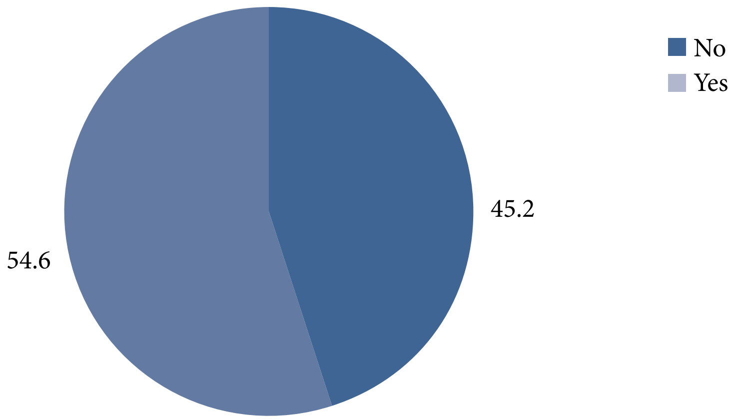
Data indicates that while 48.4% (445) of the respondents expressed having no difficulties in accessing imported acrylic, 51.7% (475) of the respondents have expressed difficulties. (Fig 42h) Refer Appendix B6.5(b) for details.

3.5.3 Costing

i) Selling price fixation

Q. 1. Do you know the final selling price of your textiles? Please tick (√) ONE only. [*YES/NO*]

Figure 43: Whether or not respondents know the final selling price (SP) of their textiles (%) (N=2,453)



The survey shows that 54.8% (1,345)out of 2,453 respondents have indicated knowing the final selling price of their textiles. (Refer Fig 43, Appendix B7.1(a) for details)

Q. 2. If 'YES', do you calculate the selling price of your textiles? Please tick (√) ONE only. [*YES/NO*]

Q. 3. If 'NO', does anyone else calculate the selling price of your textiles? Please tick (√) ONE only. [*YES/NO*]

Q. 4. If 'YES', who are they? Please tick (√) ONE only. [*Family members/ Friends/ Middlemen/ Shopkeepers who sell my products/ The person who orders the products from me/ The person who pays me wages/ Others*]

Figure 44: Whether or not they calculate SP of their own textiles, if they know their final SP (%) (N=1,345)

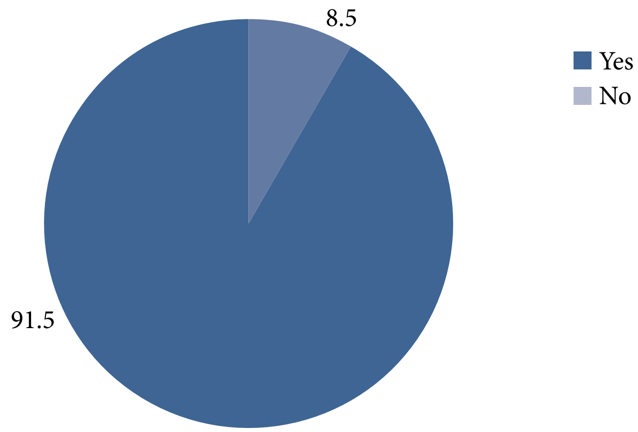


Figure 45: Whether or notsomebody else calculates the SP of their textile, if they know their final SP (%) (N=1,108)

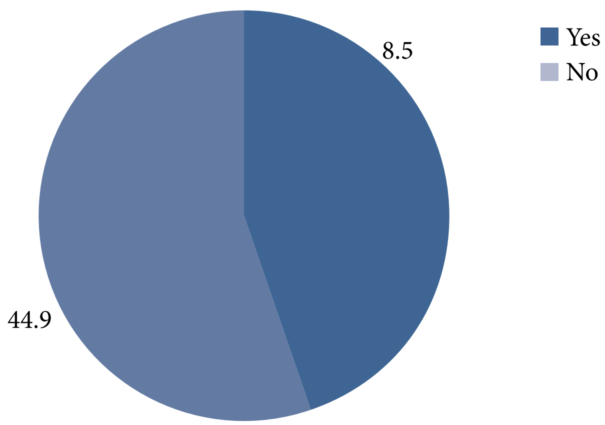
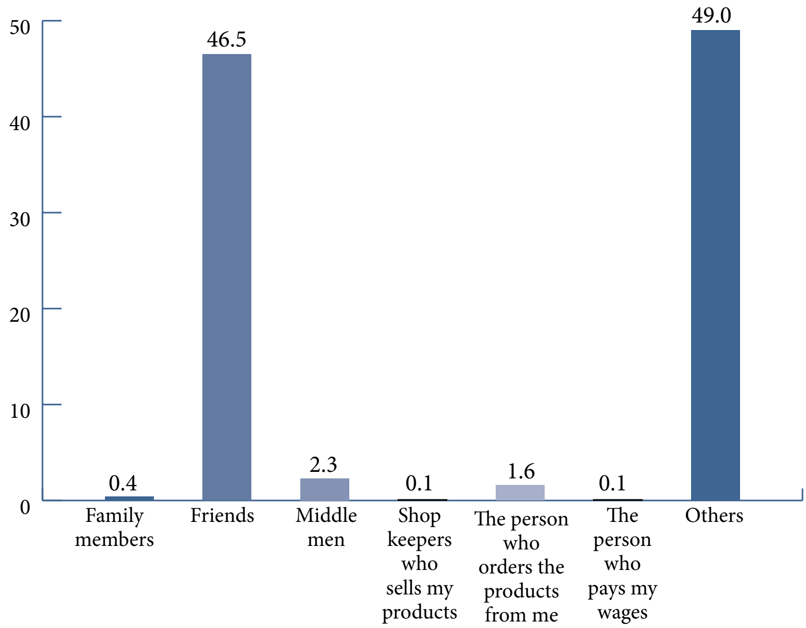


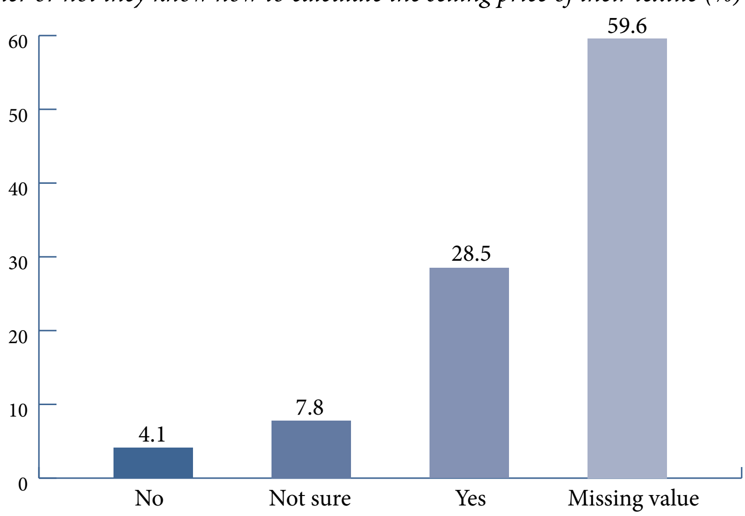
Figure 46: People who calculate selling price of their textile (%) (N=959)



In terms of whether or not they calculate the selling price of their textiles, 91.5% or 1,231 have stated that they do, of whom at least 44.9% or 497 are being assisted largely by their 'friends' (46.5% or 446) and 'others' (49.0% or 470). (Refer Figs. 44-46, Appendices B7.2-7.4 for details).

Q. 5. Do you know how to calculate the selling price of your textiles? Please tick (√) ONE only. [*Yes/ No/ Not sure*]

Figure 47: Whether or not they know how to calculate the selling price of their textile (%) (N=6,077)



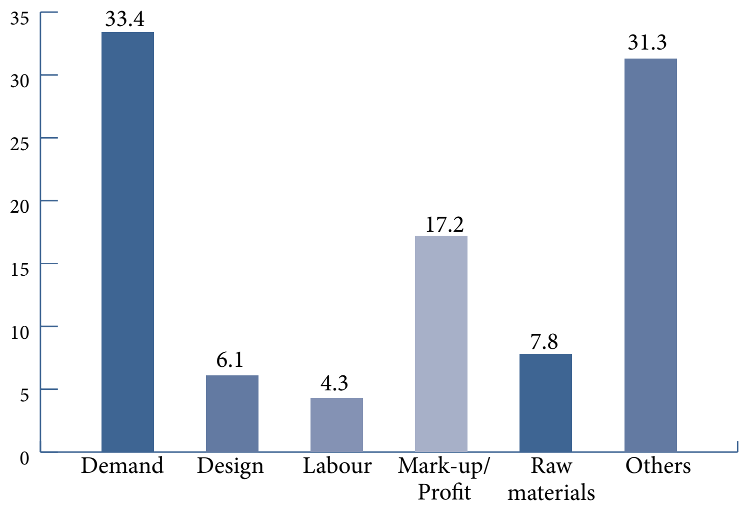
In calculating the selling price of their textiles, 28.5% or 1,731 have indicated that they know how to calculate the price. It is worth noting that 11.9% or 722 of the respondents either do not know (4.1%) or are 'not sure' (7.8%). A high 59.6% of the participants did not respond. (Fig 47) Refer Appendix B7.5 for details)

ii) Factors affecting selling price

Q. What is the most common product you wove in the past 5 years? Using this as a reference, please answer the following questions?

Q. 6a. Do you know what most affects the selling price of your textiles in the past 5 years? Please tick (√) ONE only. [*Raw materials/ Labour/ Transportation/ Design/ Mark-up/Profit/ Demand/ Others*]

Figure 48: Whether or not they know what most affected the selling price of their textiles in the past 5 years (%) (N=2,242)

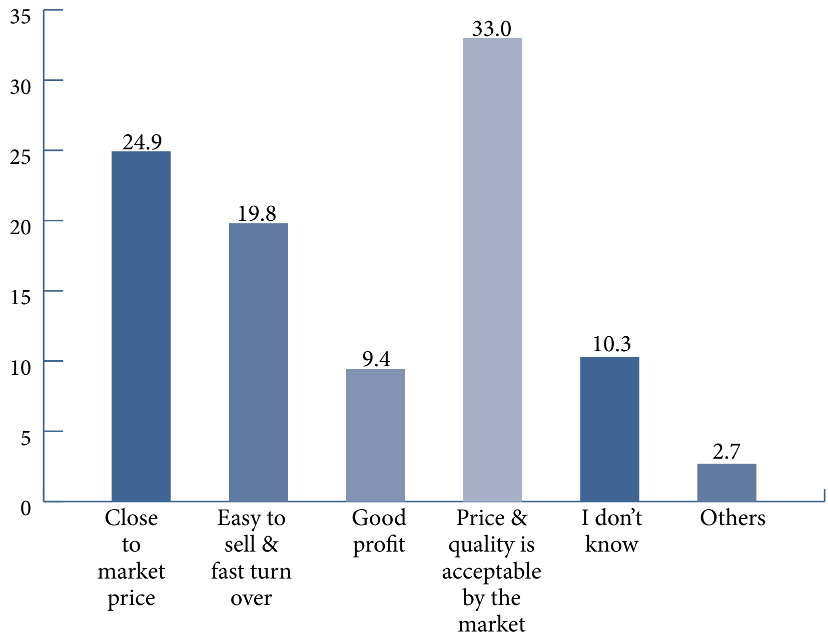


In terms of what may have affected the selling price of their textiles, 33.4% or 749 of the respondents claim that it was because of the 'demand' for the commodity, followed by 31.3% or 702 as being caused by 'others' (not specified), 17.2% or 385 being caused by 'mark-up/profit'. 'Raw materials' (7.8%), 'design' (6.1%) and 'labour' (4.3%) were stated as other causes affecting the selling price. (Fig 48) Refer Appendix B7.6 for details)

iii) Satisfaction over selling price

Q. 6b(1). Are you happy with your most recent selling price of your textile? If YES Please tick (√) All that applies. [*Close to market price/ Easy to sell and fast turn over/ Good profit/ Price and quality is acceptable by the market/ I don't know/ Others*]

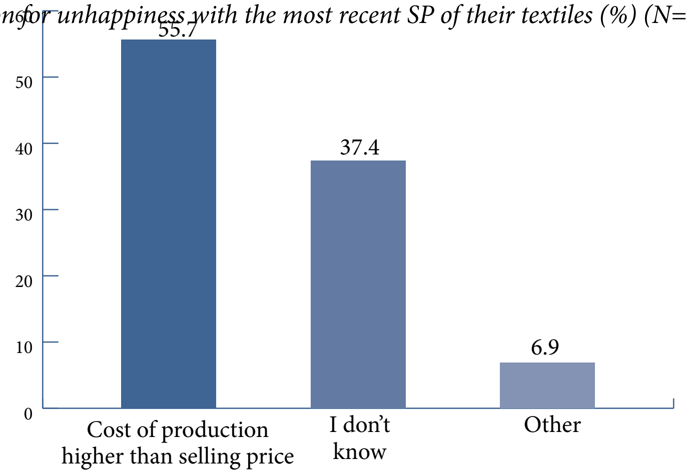
Figure 49: Satisfaction level with the most recent SP of their textiles (%) (N=1,839)



Satisfaction level with the most recent selling price of textiles seems generally good as indicated by – 33.0% or 607 of the respondents claiming that 'price and quality are acceptable by the market', 24.9% (458) stating price to be 'close to market price', 19.8% (364) indicating that it is 'easy to sell and fast turn over', and that there was 'good profit' (9.4% or 172). (Fig 49, Appendix B7.7)

Q. 6b(2). Are you happy with the most recent selling price of your textile? If NO Please tick (√) All that applies. [*Cost of production higher than selling price/ I don't know/ Others*]

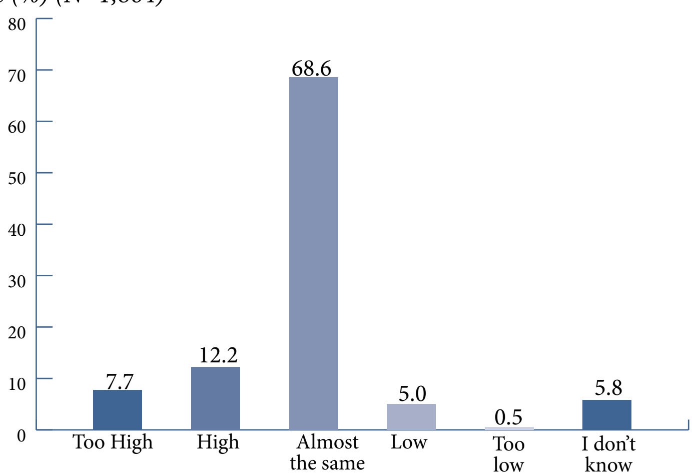
Figure 50: Reasons for unhappiness with the most recent SP of their textiles (%) (N=1,515)



However, some respondents are not happy with the most recent selling price of their textiles. While 37.4% or 566 do not know the reasons for their unhappiness, 55.7% or 844 of the respondents stated that attributed the unhappiness to 'cost of production higher than selling price'. 6.9% or 105 respondents stated 'other' reasons for their unhappiness. (Fig 50, Appendix B7.8)

Q. 6c. How does your price of this textile compare with that of other similar textiles for sale on the market in the past 5 years? Please tick (√) ONE only. *[Too high/ High/ Almost the same/ Low/ Too low/ I don't know]*

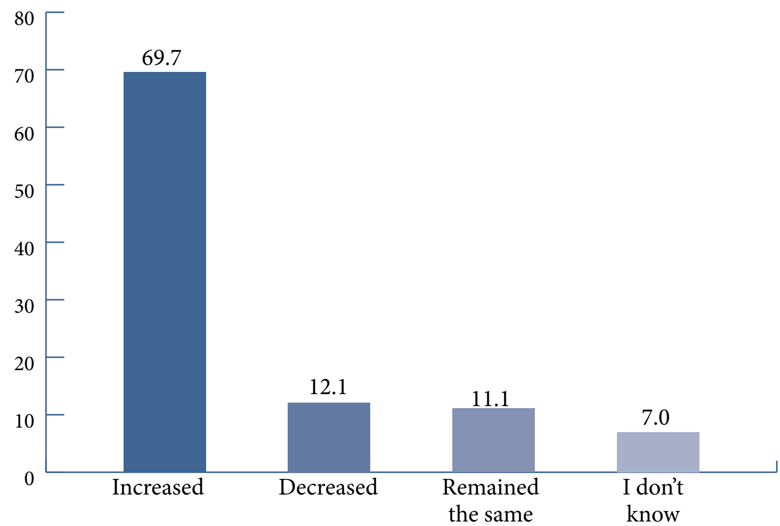
Figure 51: Views on price comparison of their textiles with other similar textiles for sale on the market in the past 5 years (%) (N=1,864)



The survey shows that 68.6% or 1,279 of the respondents opine that the price of their textile, as compared with that of other similar textiles for sale in the market in the past 5 years, has been 'almost the same'. However, 19.9% or 372 of the respondents feel that the price of their textiles are either 'high' or 'too high'. On the other hand, 5.5% or 104 of the respondents feel that the price has gone down. (Fig 51) Refer Appendix B7.9 for details.

Q. 6d. In the last 5 years, on average, do you think that the prices of your textiles have increased or decreased or remained the same? Please tick (√) ONE only. *[Increased/ Decreased/ Remained the same/ I don't know]*

Figure 52: Whether or not there have been price flactuations in the last 5 years on their textiles (%) (N=1,970)



In determining if the price of their textiles has increased, decreased, or remained the same in the last 5 years, 69.7% or 1,374 of the respondents indicated that the prices have 'increased' in the last 5 years. On the other hand, 23.2% or 458 of the respondents have indicated that the prices have either 'decreased' (12.1%) or 'remained the same' (11.1%). (Fig 52, Appendix B7.10).

3.5.4 Business Operations

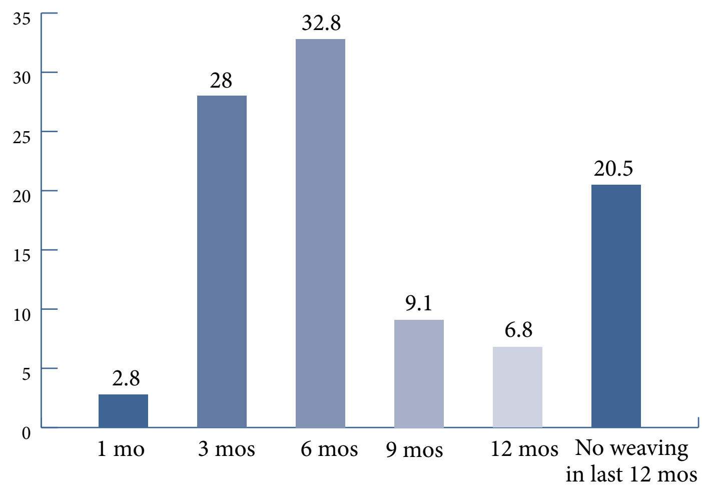
Q. Where do you weave most of your products? Please tick (√) ONE only. *[Home/ At the workshop, association/organization's venue or where the person pays my wages/ Shop/market/ Other fixed place/ Other]*

Figure 53: Location of most weaving products (%) (N=5,148)

Almost all weaving seems to happen at 'home' as indicated by the 97.9% or 5,040 of the respondents. (Fig 53, Appendix B8.1).

Q. In the past 12 months, how many months did you weave? Please tick (√) ONE only. *[1 month/ 3 months/ 6 months/ 9 months/ 12 months]*

Figure 54: Number of weaving months in last 12 months (%) (N=6,077)



In terms of time spent on weaving, 32.8% or 1,994 have indicated having spent 6 months in the past 12 months, followed by 28% or 1,704 for 3 months, 9.1% or 551 for 9 months, with 6.8% or 412 weaving all year round. 20.5% or 1,247 participants did not weave in the last 12 months. (Fig 54, Appendix B8.2)

Q. Which are the months that you did not weave at all? Please tick (√) the months that were closed for business. *[January – December]*

Q. What are the reasons for not weaving? Please tick (√) all that apply. *[Time with family/ Unavailability of raw materials/ Farming seasons/ Pilgrimage and/or festivals/ Other]*

Figure 55: No weaving months in the year (%) (N=6,077)

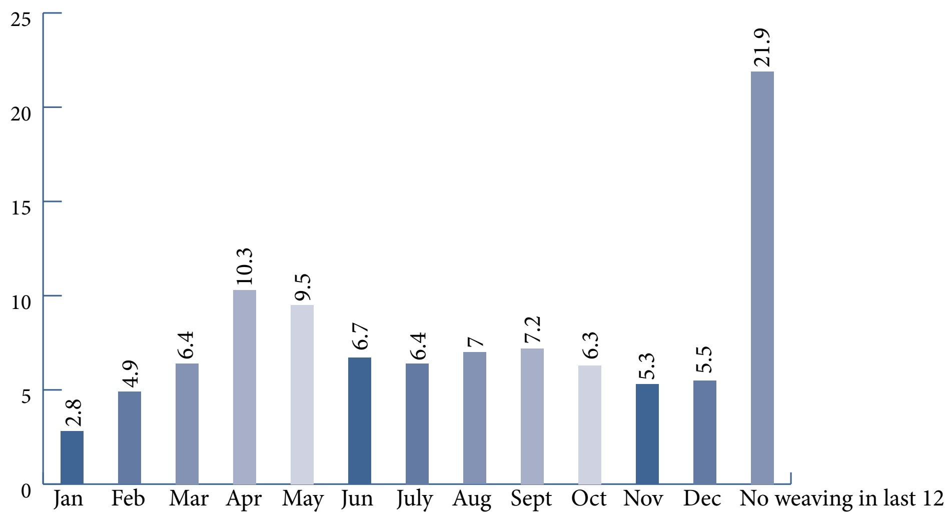
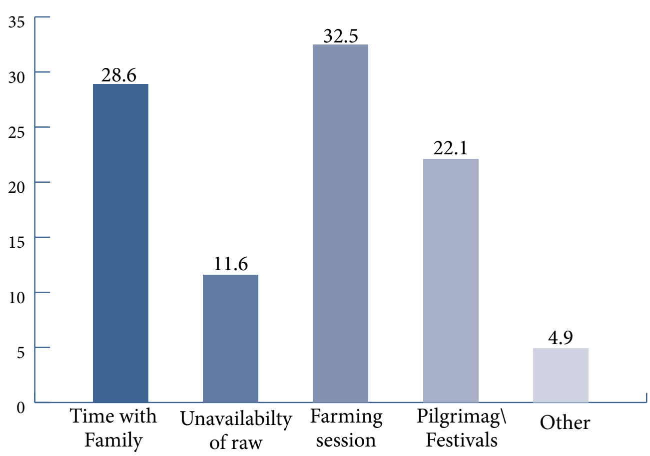


Figure 56: Reasons for not weaving during those specified months (%) (N=3,068)

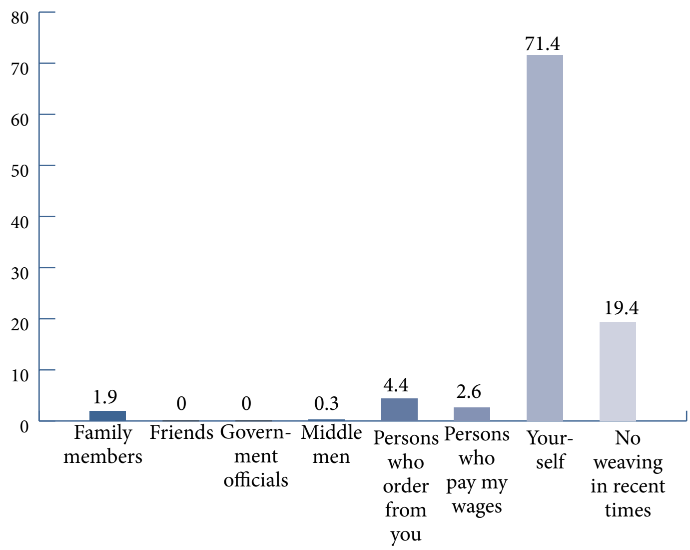


While there are no specific months that stand out, respondents have indicated the months from 'April to 'October' from 6.3% or 381 (October) to 10.3% or 623 (April) as the time they are more engaged in weaving. (Fig 55, Appendix B8.3) The reasons for taking time off from their weaving, 32.5% or 998 of the respondents said was because of 'farming season', followed by 28.9% or 886 for 'time with family', 22.1% or 678 for 'pilgrimage/festivals', and 11.6% or 355 as owing 'unavailability of raw materials'. (Fig 56, Appendix B8.4)

3.5.5 Merchandizing

Q. Who decides what and how much to weave? Please tick (√) ONE only. *[Yourself/ Family members/ Friends/ Middle men/ Shop keepers/ Persons who order from you/ Persons who pay my wages/ Government officials/ NGOs or Foundations or Institutions or Aid agencies/ Other]*

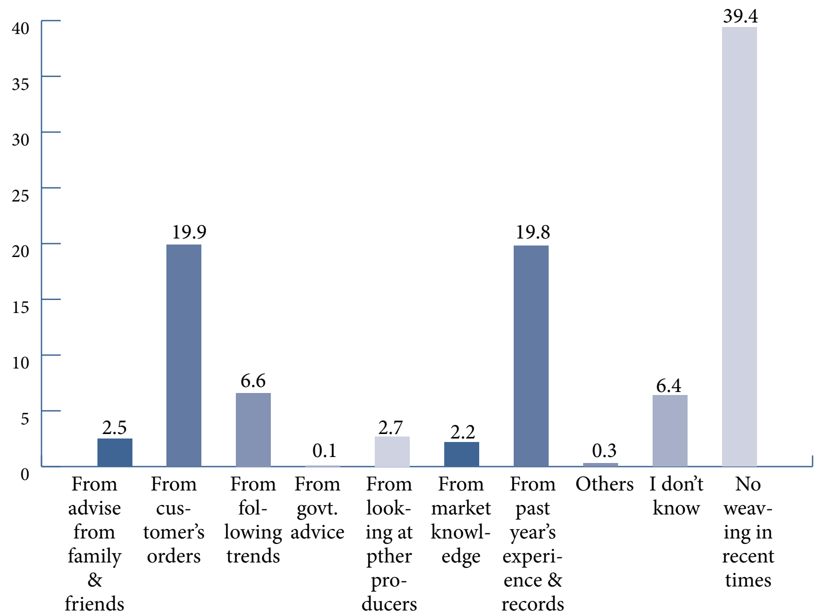
Figure 57: Decision maker on what and how much to weave (%) (N=6,077)



The decision as to what and how much to weave seems to be made largely by weavers themselves as indicated by 71.4% or 4,338 of the respondents responding to the choice item 'Yourself'. Other smaller responses were – 4.4% or 265 for 'Persons who order from you', 2.6% or 160 for 'Persons who pay my wages', 1.9% or 117 for 'Family members', etc. (Fig 57, Appendix B9.1)

Q. How did you or the person who was involved in the decision know what and how much to weave? Please tick (√) ONE only. *[From past years' experience and records/ From customers' orders/ From following trends/ From government advice/ From market knowledge/ From looking at other producers/ Advise from family & friends/ I don't know/ Other]*

Figure 58: Basis for the decision on what and how much to weave (%) (N=6,077)

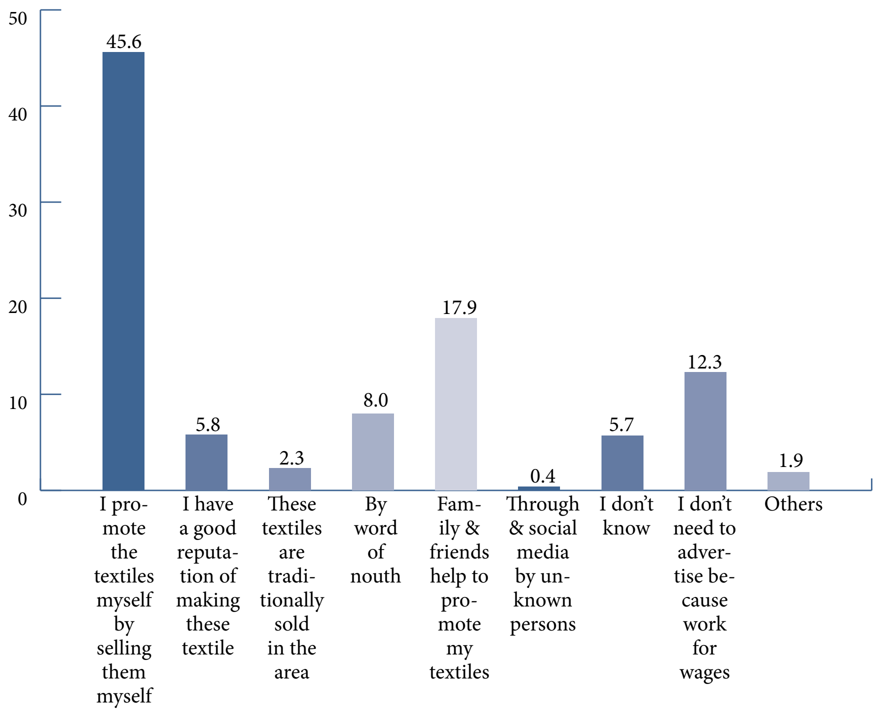


The basis of decision as to what and how much to weave seems to be varied. However, 'From customers' orders (19.9% or 1,209) and 'From past years' experience and records' (19.8% or 1,206) seem to be the major basis for decisions on what and how much to weave. Other minor basis for their decisions seem to hinge on 'following trends', 'looking at other producers', 'advice from family and friends', 'market knowledge', etc. 6.4% or 386 of the respondents have no idea as to on what basis they arrive at the decision as to what and how much to weave. (Fig 58, Appendix B9.2)

3.5.6 Advertising and Promotion

Q. In your opinion, which is the most popular means of people knowing that you are weaving and selling your textiles? Please tick (√) ONE only. *[I promote the textiles myself by selling them myself/ I have a good reputation of making these textiles/ These textiles are traditionally sold in the area/ By word of mouth/ Family and friends help to promote my textiles/ Through social media by unknown persons/ Advertisement in media (TV, newspapers, magazines, etc)/ I don't know/ I don't need to advertise because I work for wages/ Other]*

Figure 59: Means of advertisement and promoting textile products (%) (N=2,899)



In terms of advertisement and promotion of their textile products, 45.6% or 1,323 of the respondents have indicated that they promote themselves as they sell ('I promote the textiles myself by selling them myself'), followed by 17.9% or 520 through 'family and friends', 8% or 232 through 'word of mouth', and having 'a good reputation of making these textiles' (5.8% or 168). While 'social media' is used minimally (0.4% or 11), 12.3% or 356 feel they 'don't need to advertise because I work for wages'. (Fig 59, Appendix B10.1)

3.5.7 Purchaser Profile

i) Knowing your customers

Q. 1. Do you know who are your main purchasers? Please tick (√) ONE only. *[Yes/ No/ May be]*

Q. 2. If 'Yes', who are they? Please tick (√) ONE only. *[Bhutanese/ Non-Bhutanese]*

Figure 60: Whether or Not respondents know their main purchasers (%) (N=1,949)

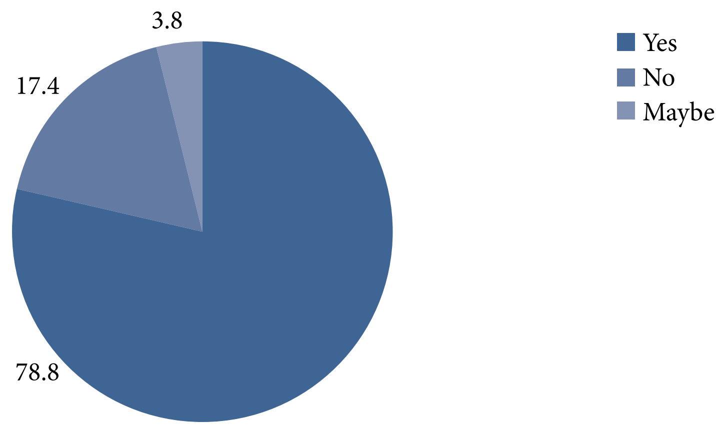
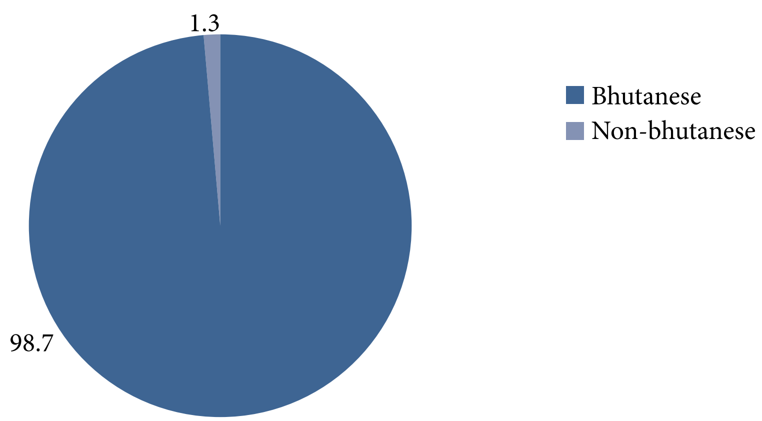


Figure 61: Purchasers - Bhutanese or Non-Bhutanese (%) (N=1,627)



As to whether or not the respondents know purchasers of their textile products, 78.8% or 1,535 of the respondents confirmed knowing them. Purchasers are mostly identified as Bhutanese (98.7% or 1,606). (Figs 60 & 61, Appendices B11.1 & B11.2)

ii) Bhutanese customers

Q. Who are your main customers? Please tick (√) ONE only. *[Other households or individuals/ Small enterprises/ Large enterprises/ Government or other public firms/ Local retail traders/ Exporters/ Contractor/ NGO or International organizations/ Other]*

Q. Do you know where they are from? Please tick (√) ONE only. *[Same Gewog/ Same Dzongkhag/ Same region (East, West, Central & South)/ All over Bhutan (except Thimphu)/ Thimphu/ Other]*

Figure 62: Idenifying the main customers (%) N=1,693)

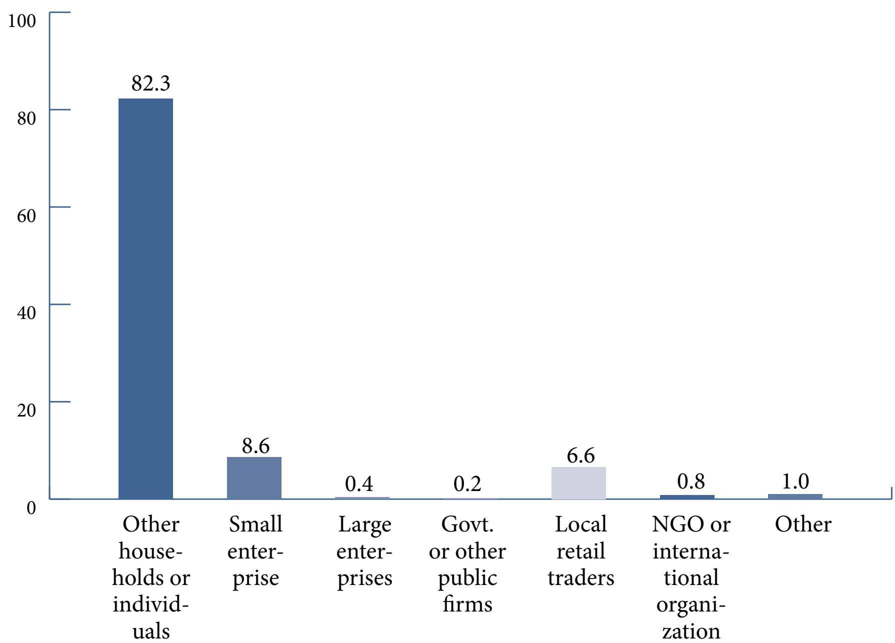
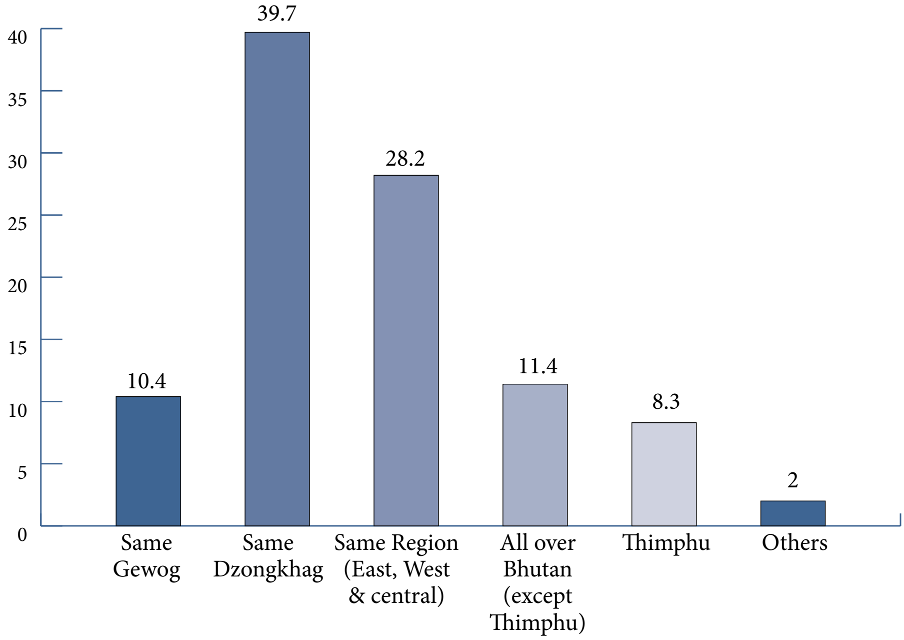


Figure 63: Geographical distribution of customers (%) (N=1,639)



With respect to identifying customers, 82.3% or 1,394 of 1,693 of the respondents identified 'other households or individuals' as their main customers, followed by two other small groups – 'small enterprises' (8.6% or 146) and 'local retail traders' (6.6% or 112). (Fig 62, Appendix B11.3) This is corroborated by the geographical distribution of their customers – out of 1,639 respondents, 'same Dzongkhag' (39.7% or 650), 'same region' (28.2% or 463) and 'same Gewog' (10.4% or 170). (Fig 63, Appendix B11.4)

Q. Which gender purchase your products the most? Please tick (√) ONE only. *[Female/ Male/ Male and Female in equal proportion]*

Q. What is their age range? Please tick (√) ONE only. *[Below 20/ 21-29/ 30-39/ 40-49/ 50-59/ Above 60]*

Q. Do you know where they are from? Please tick (√) ONE only. *[Same Gewog/ Same Dzongkhag/ Same region East, West, Central, South)/ All over Bhutan (except Thimphu)/ Thimphu]*

Figure 64: Customers by gender (%) (N=1,649)

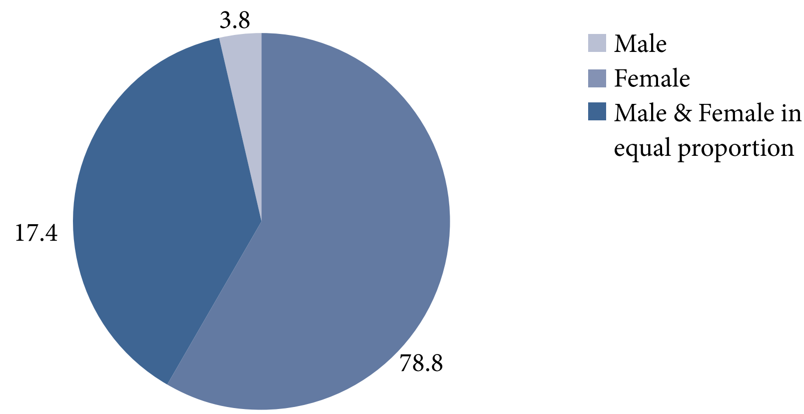


Figure 65: Customers by age (%) (N=1,618)

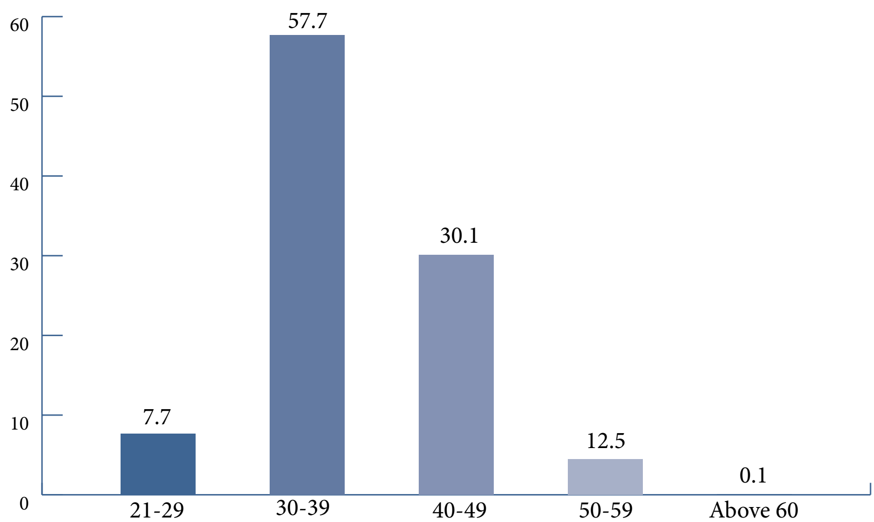
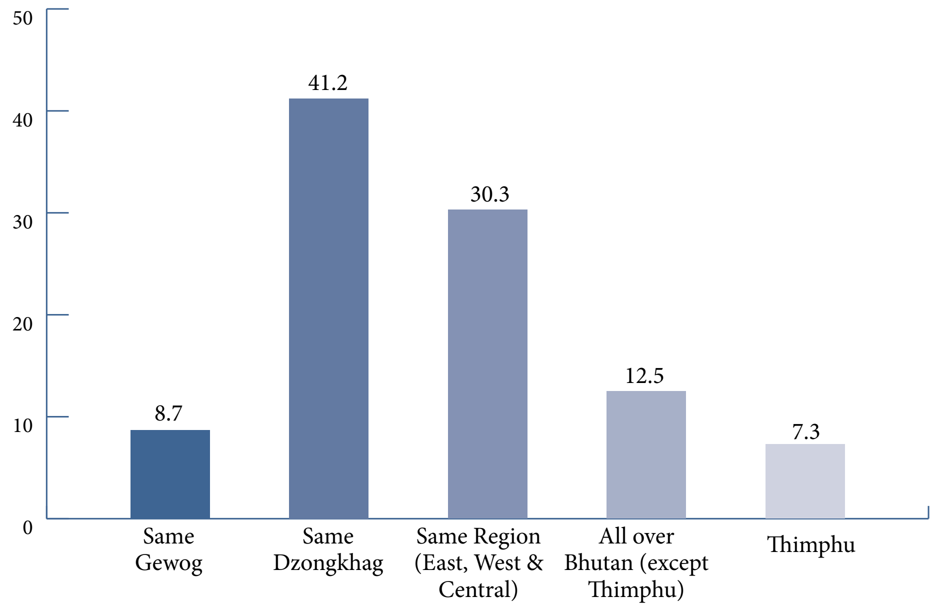


Figure 66: Geographical distribution of individual customers (%) (N=1,606)



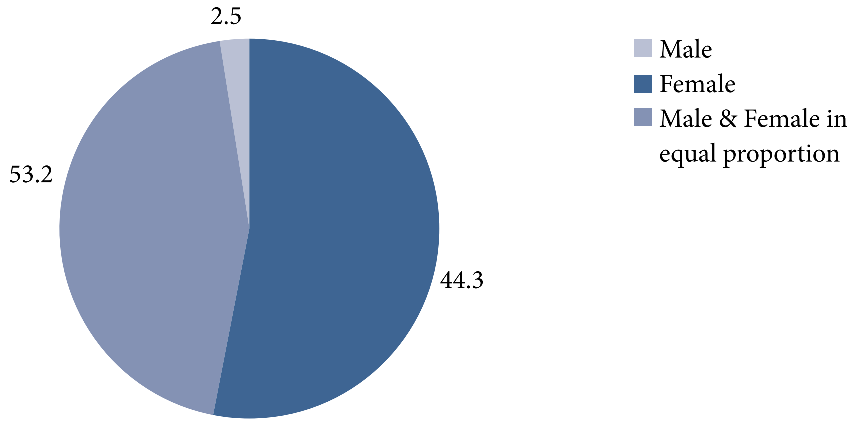
Going by the gender representation of customers, 58.4% or 963 of the 1,649 respondents stated 'male and female in equal proportion', at least 38.1% or 629 of the respondents indicated their customers being 'female'; only 3.5% or 57 mentioned their customers being 'male'. (Fig 64, Appendix B11.5) Respondents have indicated that at least 87.8% or 1,420 of 1,618 of their main customers fall within the age range of 30 – 49 years (57.7% '30-39' years, 30.1% '40-49' years) (Fig 65, Appendix B11.6) Geographical distribution of their main customers are, if not same, similar in trend to that discussed in the immediate paragraph hereinabove. (Fig 66, Appendix B11.7)

ii) Non-Bhutanese customers

Q. What is their gender? Please tick (√) ONE only. *[Male/ Female/ Male and female in equal proportion]*

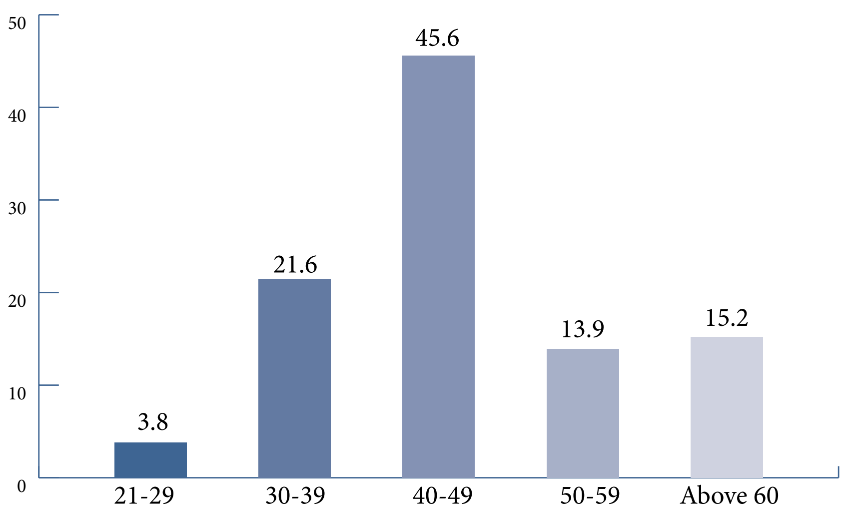
Q. What is their age range? Please tick (√) ONE only. *[Below 20/ 21-29/ 30-39/ 40-49/ 50-59/ Above 60]*

Figure 67: Non-Bhutanese customers by gender (%) (N=79)



A small group of respondents claimed that they had non-Bhutanese purchasing their textile products. 53.2% or 42 of 79 of the respondents indicated that their purchasers were 'male and female in equal proportion', and another 44.3% or 35 of 79 indicated being exclusively 'female' purchasers. (Fig 67, Appendix B11.8)

Figure 68: Non-Bhutanese customers by age range (%) (N=79)



45.6% (36) of the non-Bhutanese customers are within the age range of '40 – 49 years', followed by 21.5% for the age range of '30 – 39 years', 15.2% for 'above 60 years', 13.9% for 50-59 years', etc. (Fig 68, Appendix B11.9)

Q. Do you know which country do they come from? *[Yes/ No]*

Q. If 'Yes' where do the majority of your non-Bhutanese purchasers come from? Please tick (√) ONE only. *[Regional (SAARC Countries/ International)]*

Figure 69: Whether or not they know wthe nationalities of their customers (%) (N=85)

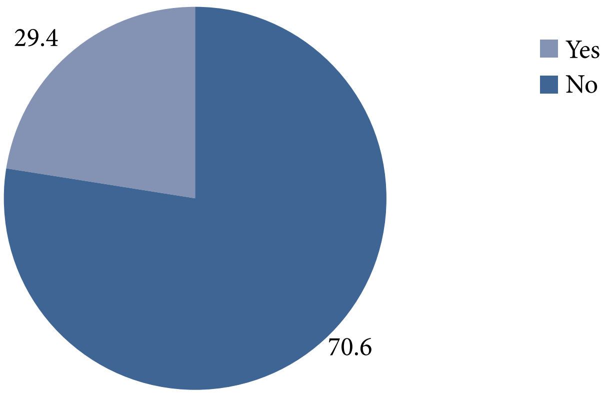
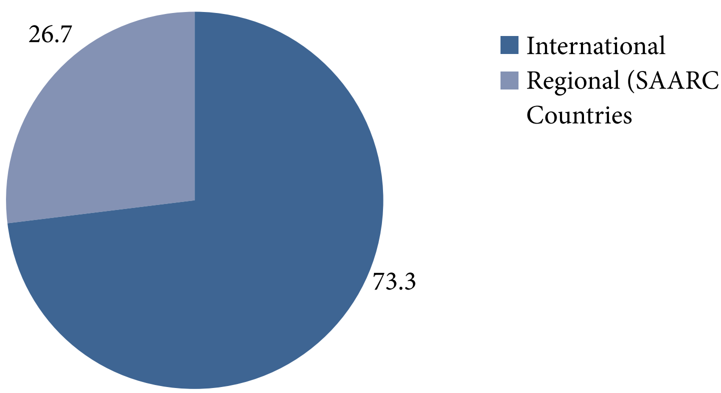


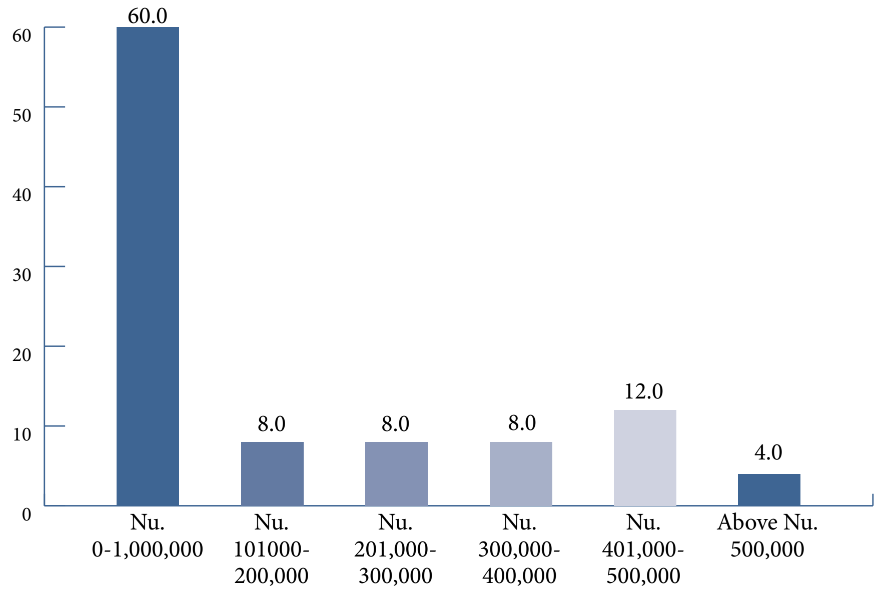
Figure 70: Customers - International or Regional (SAARC countries) (%) (N=30)



In terms of nationalities, while only 29.4% or 25 of 79 of the respondents indicated knowing their purchasers' nationalities or countries that these customers are from (Fig 69, Appendix B11.10), respondents identified their purchasers – 73.3% or 22 of 30 as 'international' and 26.7% or 8 of 30 as 'Regional (SAARC countries)'. (Fig 70, Appendix B11.11)

Q. In the last 5 years, on average, how much did they buy within a single purchase? *[To quote in Bhutanese Ngultrums]*

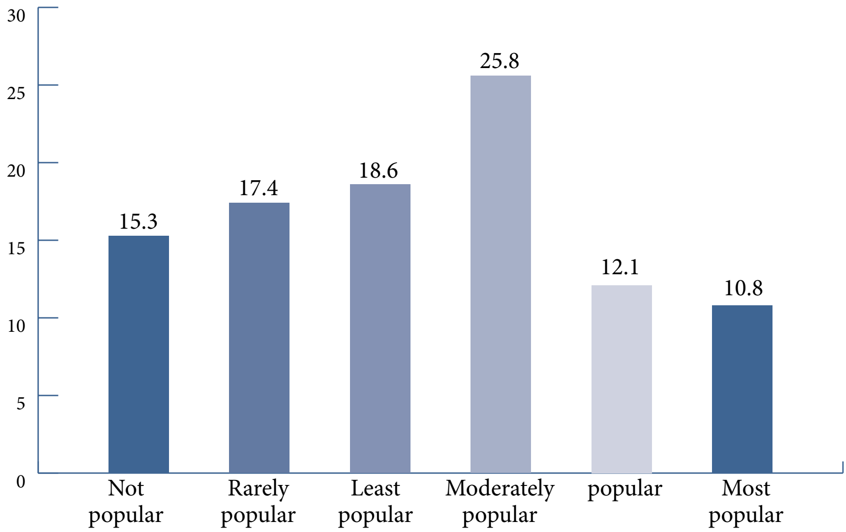
Figure 71: Average purchase volume in the past 5 years (%) (N=25)



With regards to volume in a single purchase in the past 5 years, while 60.0% or 15 of 25 of the respondents indicated non-Bhutanese purchasers as having purchased textiles worth Ngultrum 'less than 100,000', 12% or 3 respondents claimed that there have been purchases worth 'Nu.401,000-500,000', followed by 8.0% or 2 of 25 respondents each for 'Nu.301,000-400,00', 'Nu.201,000-300,000' and 'Nu.101,000-200,000'. There has also been at least 4.0% or 1 of 25 of the respondents claiming that a single purchase has been 'above Nu.500,000'. (Fig 71, Appendix B11.12)

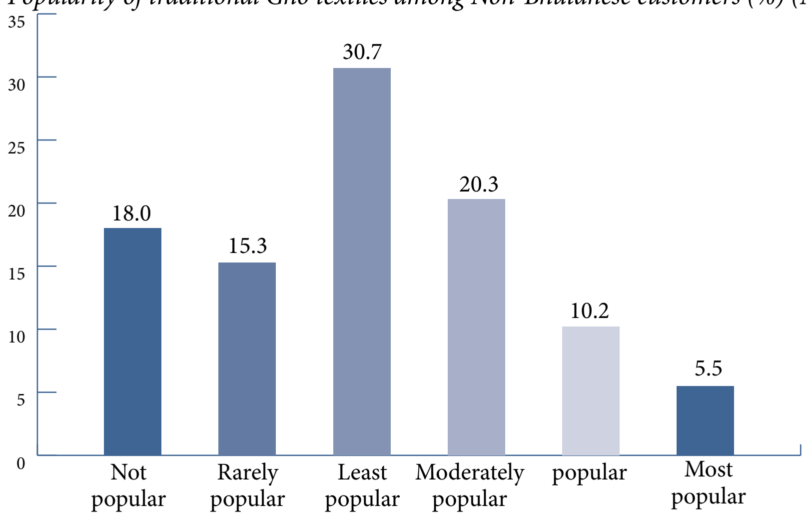
Q. From a scale of 0 – Not popular to 5 – most popular, can you rate the following products in terms of popularity amongst your non-Bhutanese purchasers? Please tick (√) all those that are relevant. *[Traditional Kira textiles/ Traditional Gho textiles/ Other traditional textiles (Rachu, Kera, etc)/ Yathra textiles/ Contemporary scarves & shawls/ Soft furnishings (e.g. placemats, table runners, etc.)]*

Figure 72(a): Popularity of traditional Kira textiles among non-Bhutanese customers (%) (N=6,077)



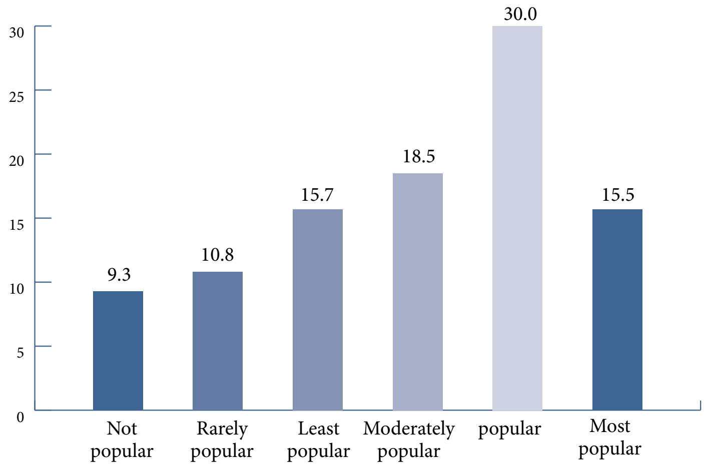
While 48.7% (2,954) of the respondents indicate that traditional *Kira* textiles are moderate to most popular among the non-Bhutanese customers, 51.3% (3,123) of the respondents claim that it is not or least popular among the non-Bhutanese customers. (Fig 72a). Refer Appendix B11.13 for details.

Figure 72(b): Popularity of traditional Gho textiles among Non-Bhutanese customers (%) (N=6,077)



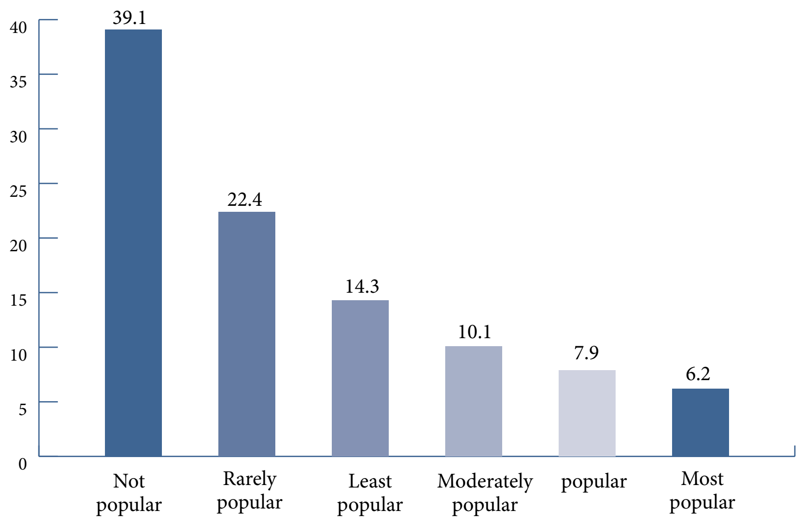
Data shows that while 36% (2,190) of the respondents indicate that traditional *Gho* textiles are moderate to most popular among non-Bhutanese customers, 64% (3,887) of the respondents claim that it is not or least popular among non-Bhutanese customers. (Fig 72ab). Refer Appendix B11.13 for details.

Figure 72(c): Populairty of other traditional textiles (Rachu, Kera, etc.) among non-Bhutanese customers (%) (N=6,077)



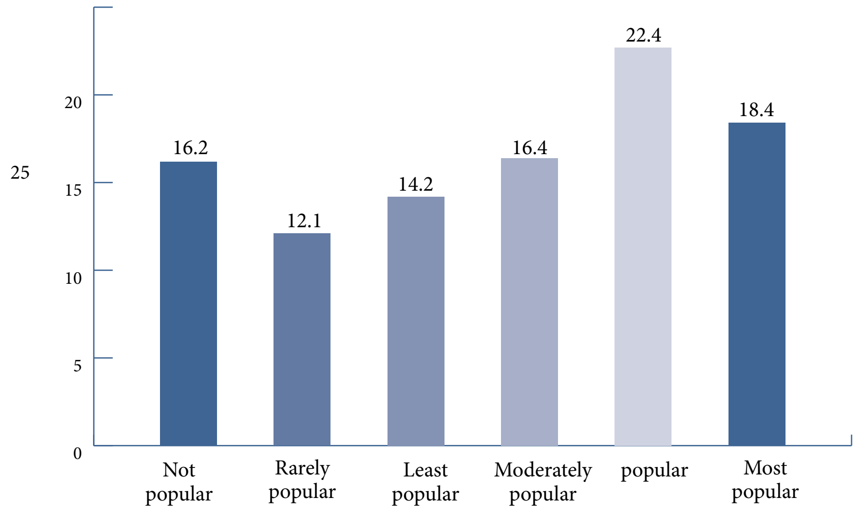
Data shows that 64.2% (3,902) of the respondents indicate that other traditional textiles (*Rachu, Kera,* etc.) are moderate to most popular among non-Bhutanese customers, while 35.8% (2,175) of the respondents claim that it is not or least popular among the non-Bhutanese customers. (Fig 72c). Refer Appendix B11.13 for details.

Figure 72(d): Popularity of Yathra textiles among non-Bhutanese customers (%) (N=6,077)



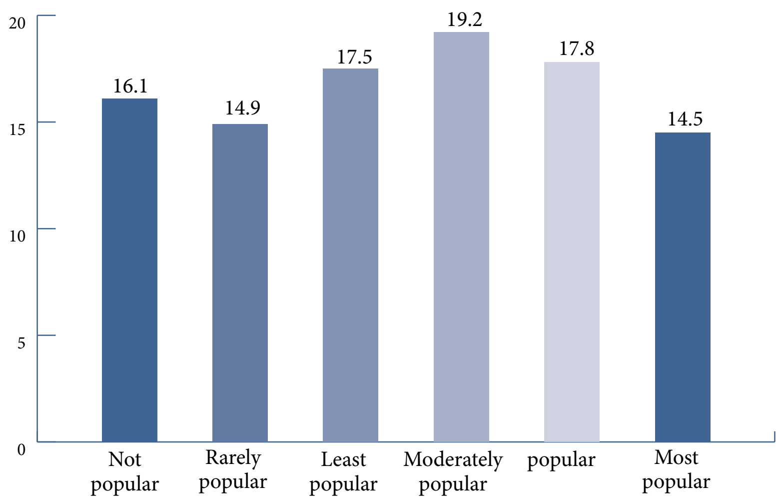
Data shows that while 24.2% (1,470) of the respondents indicate that traditional *Yathra* textiles are moderate to most popular among the non-Bhutanese customers, 75.8% (4,607) of the respondents claim that it is not or the least popular among non-Bhutanese customers. (Fig 72d). Refer Appendix B11.13 for details.

Figure 72(e): Popularity of contemporary scarves and shawls among non-Bhutanese customers (%) (N=6,077)



57.5% (3,491) of the respondents indicate that contemporary scarves and shawls are moderate to most popular among non-Bhutanese customers, while 42.5% (2,586) of the respondents claim that it is not or the least popular among non-Bhutanese customers. (Fig 72e). Refer Appendix B11.13 for details.

Figure 72(f): Popularity of soft furnishings (eg. Placemats, table runners, etc.) among non-Bhutanese customers (%) (N=6,077)



Data shows that while 51.5% (3,127) of the respondents indicate that soft furnishings (e.g., placemats, table runners, etc.) are moderate to most popular among non-Bhutanese customers, 48.5% (2,950) of the respondents claim that it is not or the least popular among non-Bhutanese customers. (Fig 72f). Refer Appendix B11.13 for details.

3.5.8 Marketing and Sales

i) Place of sale, customer location, sale modes

Q. Where do you sell your textiles? Please tick (√) ONE only. *[At home/ Local market/ All over Bhutan/ Neighbouring countries (India, Nepal, Bangladesh)/ Other]*

Q. Where are your most frequent customers based? Please tick (√) ONE only. *[Same Gewog/ Same Dzongkhag/ Same region (East, West, Central, South)/ All over Bhutan (except Thimphu)/ Thimphu/ Other]*

Figure 73: Place of textile sales (%) (N=5,411

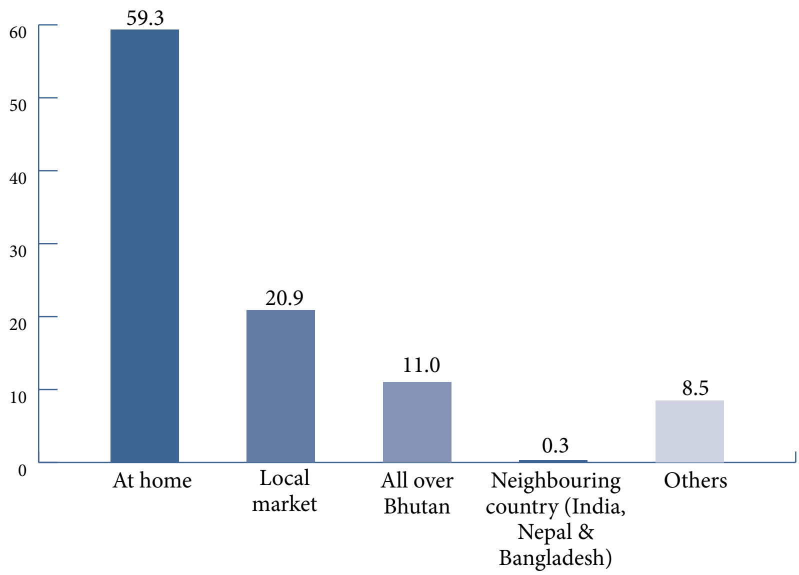
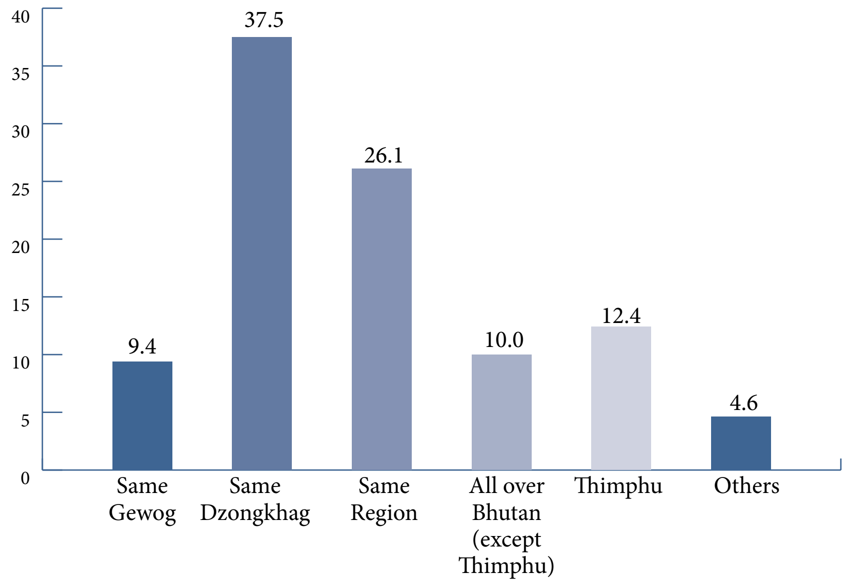


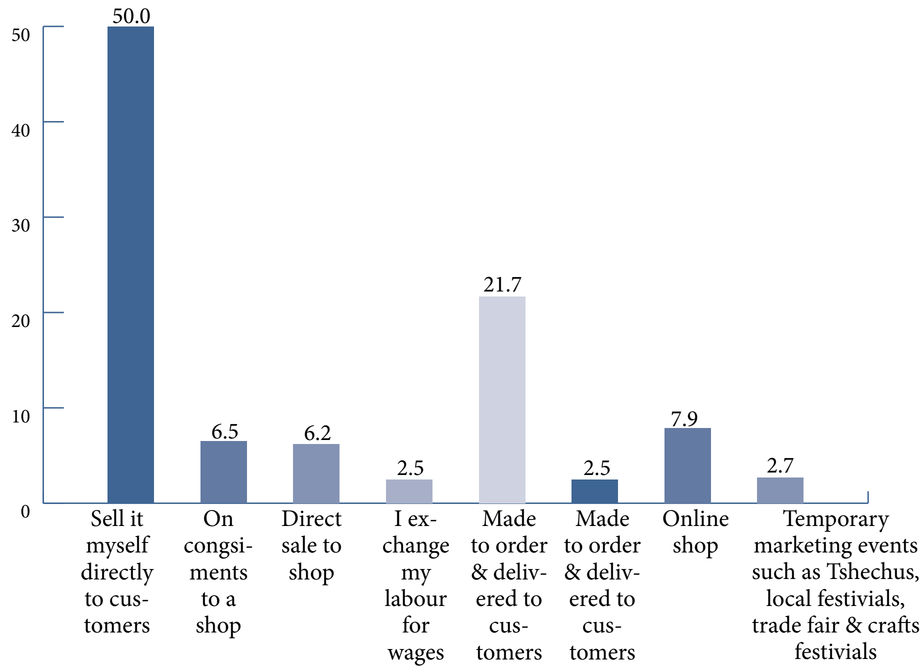
Figure 74: Base of most frequent customers (%) (N=5,413)



Respondents have indicated that their textile products are mainly sold 'at home' (59.3% or 3,209) and 'local market' (20.9% or 1,131), and to a certain extent 'all over Bhutan' (11% or 595). (Fig 73, Appendix B12.1) This is corroborated by the geographical distribution of their frequent customers – 'same Dzongkhag' (37.5% or 2,030), 'same region' (26.1% or 1,413) and 'same Gewog' (9.4% or 509). (Fig 74, Appendix B12.2)

Q. How do you mainly sell your textiles? Please tick (√) all that applies. *[Sell it myself directly to customers/ Through a 3rd party – middle person, family, friends, etc/ On consignment to a shop/ I exchange my labour for wages/ Made-to-Order and delivered to customers/ Online shops/ Temporary marketing events such as Tshechus, local festivals, trade fairs and crafts festivals]*

Figure 75: Main mode of sale of textiles (%) (N=5,406)

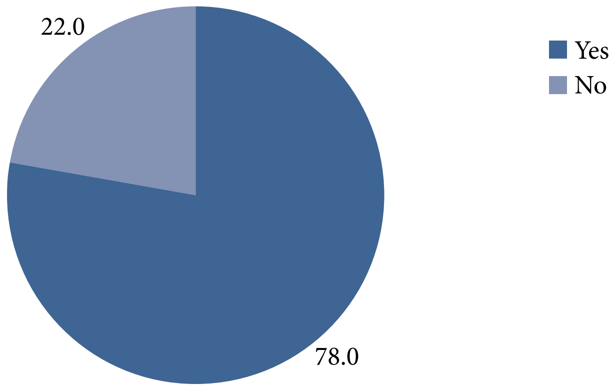


The main mode of sale of textiles is 'sell it myself directly to customers' (50% or 2,701) and 'made-to-order and deliver to customers' (21.7% or 1,174). (Fig 75, Appendix B12.3)

iii) Whether or not there are challenges in selling products

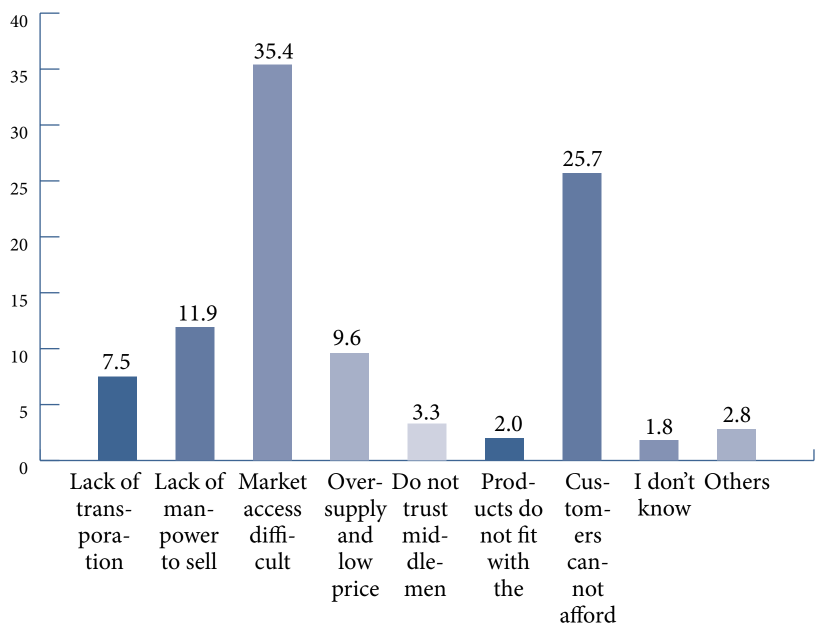
Q. Do you have any difficulties in selling your products? If YES, why? Please tick (√) all that applies. *[Lack of transportation/ Lack of manpower to sell/ Market access difficult/ Over-supply and low price/ Do not trust middlemen/ Products do not fit with the market/ Customers cannot afford/ I don't know/ Other]*

Figure 76: Whether or Not weavers have challenges in selling their products (%)



Whether or not weavers have challenges in selling their textile products, 78% of the respondents have stated that they do have challenges in selling their products, involving various factors. 22% of the respondents were able to sell due to various reasons. (Fig 76)

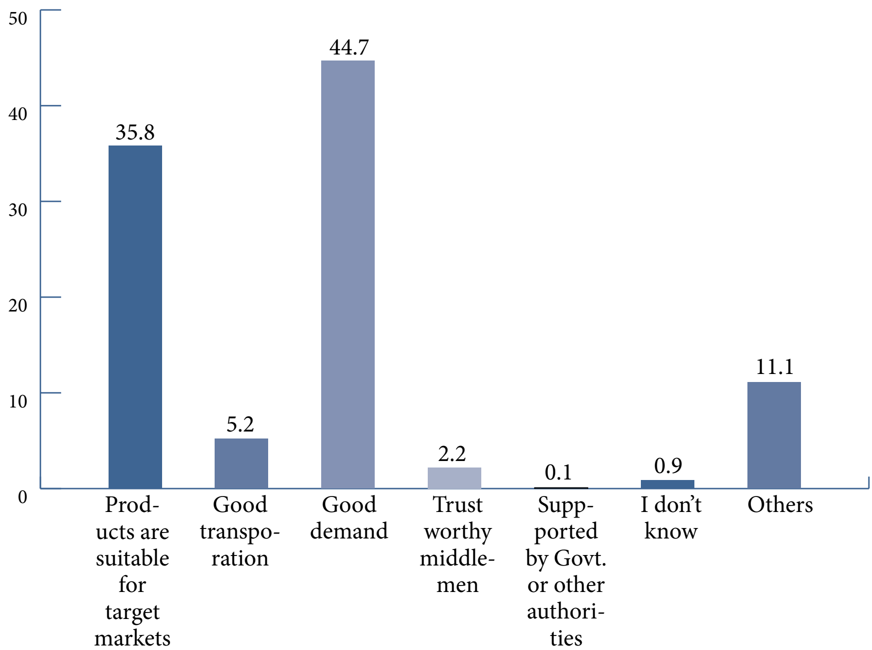
Figure 77(a): Challenges in selling products (%) (N=4,760)



In terms of challenges in selling their textile products, 35.4% or 1,686 of 4,760 respondents have stated 'market access' as difficult, followed by 25.7% or 1,225 whose 'customers cannot afford' their products. There are also issues of 'lack of manpower' (11.9%), 'over supply and low price' (9.6%), 'lack of transportation' (7.5%), etc. (Fig 77(a), Appendix B12.4a)

Q. Do you have any difficulties in selling your products? If NO, why? Please tick (√) all that applies. [Products are suitable for target markets/ Good transportation/ Good demand/ Trustworthy middlemen/ Supported by Government or other authorities/ I don't know/ Other]

Figure 77(b): Reasons for being able to sell products (%) (N=1,342)



On the other hand, there are others who face no difficulties in selling their textiles products who attribute it to – 'good demand' (44.7% or 600 of 1,342), 'products are suitable for the target markets' (35.8% or 480 of 1,342), etc. (Fig 77b) Refer Appendix B12.4(b) for details.

iv) Knowing what sells best/worst and why

Q. Do you know what is your best-selling product in the last 5 years? Please tick (√) ONE only. *[Yes/ No/ Not Sure]*

Q. What is your best-selling product? *[Name/ Selling price/ Quantity sold within a year]*

Figure 78: Knowing their best-selling product in the last 5 years (%) (N=5,843)

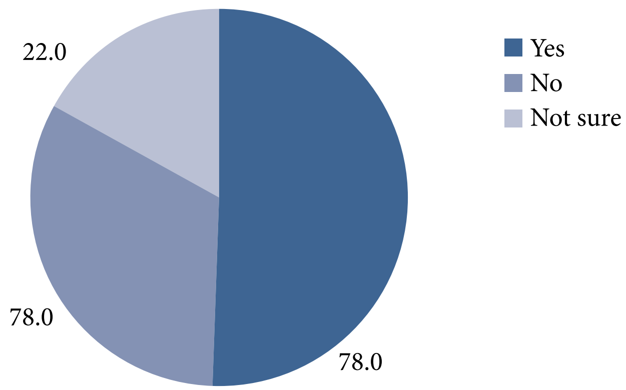


Figure 79: Best-selling products in the last 5 years by product name (%) (N=4,813)

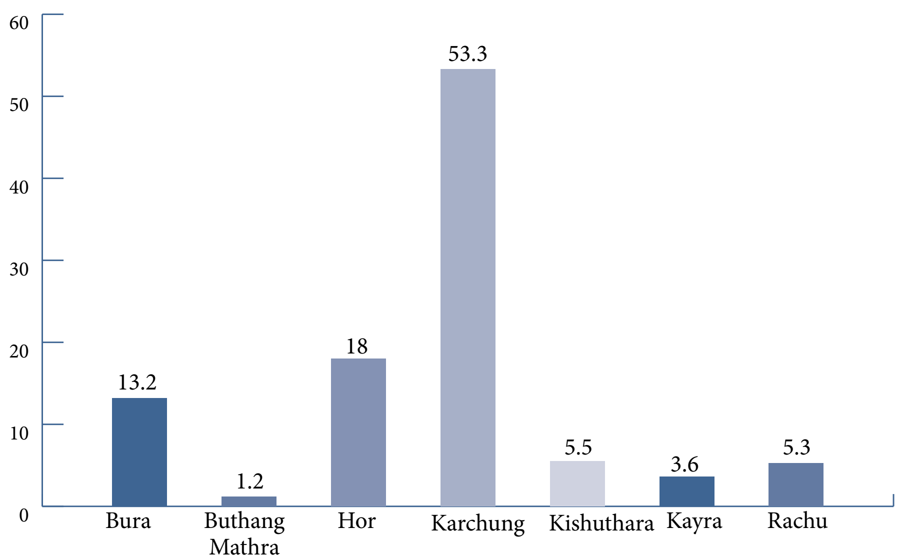


Figure 80: Best-selling product in alast 5 years by selling price (%) (N=4,813)

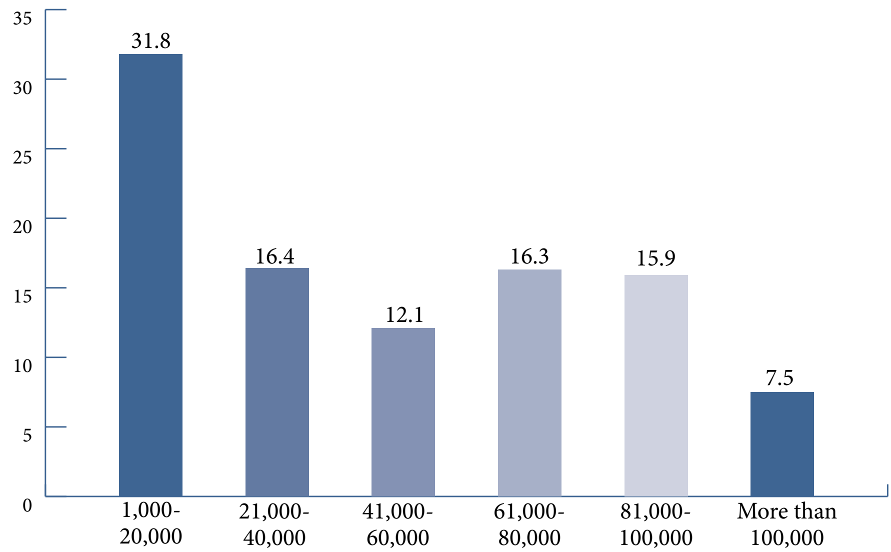
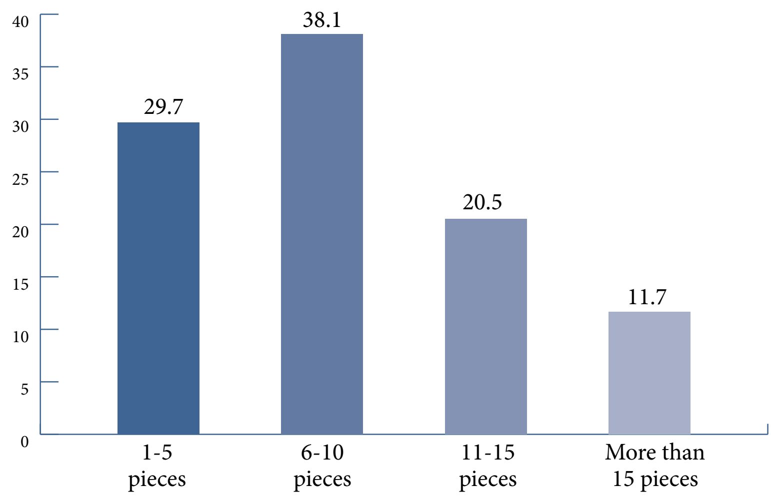


Figure 81: Best-selling product in last 5 years by quantity sold within a year %) (N=4,813)



When it comes to knowing their best-selling product in the last 5 years, 50.7% or 2,964 claimed that they know. (Fig 78, Appendix B12.5). 53.3% or 2,566 of 4,813 of the respondents have named '*Karchang*' as their best-selling product in the last 5 years, followed by 18.0% or 866 for '*Hor*' and 13.2% or 635 for '*Bura*'. (Fig 79, Appendix B12.6)

With respect to selling price of their products in the last 5 years, 31.8% or 1,532 of 4,813 of the respondents claimed to have fetched between 'Nu.1,000 – 20,000', followed by 16.4% or 789 of respondents for 'Nu.21,000 – 40,000', 16.3% (or 786) for 'Nu.61,000 – 80,000', 15.9% (763) for Nu.81,000 – 100,000', 12.1% (584) for 'Nu.41,000 – 60,000', and 7.5% (359) for 'more than 100,000'. (Fig 80, Appendix B12.7)

In terms of quantities sold within one year of the best-selling product in the past 5 years, 38.1% or 1,833 of 4,813 of the respondents claimed to have sold '6-10 pieces' within one year, followed by 29.7% or 1,429 having sold '1-5 pieces', 20.5% or 987 having sold '11-15 pieces', and 11.7% or 564 having sold 'more than 15 pieces'. (Fig 81, Appendix B12.8)

Q. Do you know what is your worst-selling product in the last 5 years? Please tick (√) ONE only. *[Yes/ No/ Not Sure]*

Q. What is your worst-selling product? *[Name/ Selling price/ Quantity sold per month]*

Figure 82: Knowing their worst-selling product in the last 5 years (%) (N=6,077)

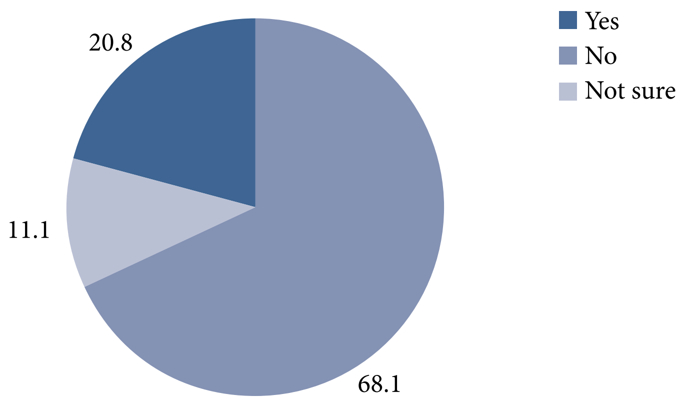


Figure 83: Worst-selling product in the last 5 years by product name (%) (N=1,264)

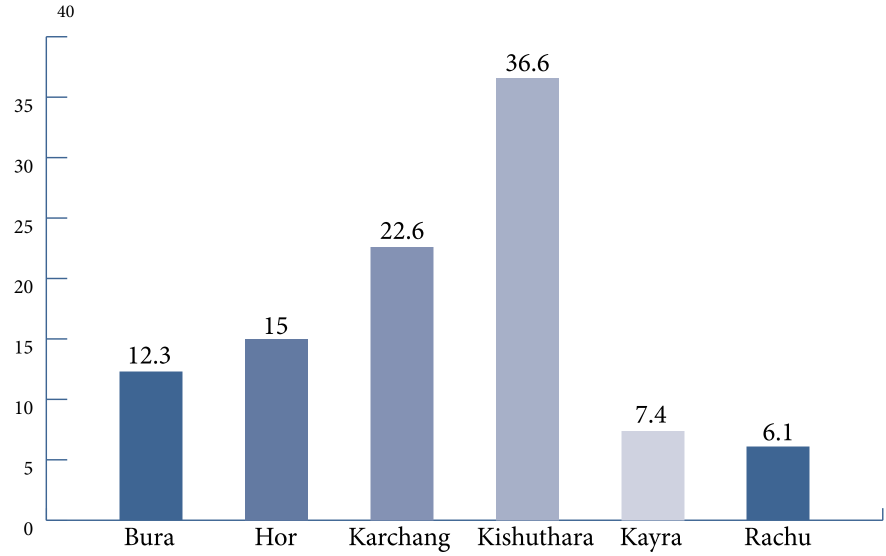


Figure 84: Worst-selling product in the last 5 years by selling price (%) (N=1,264)

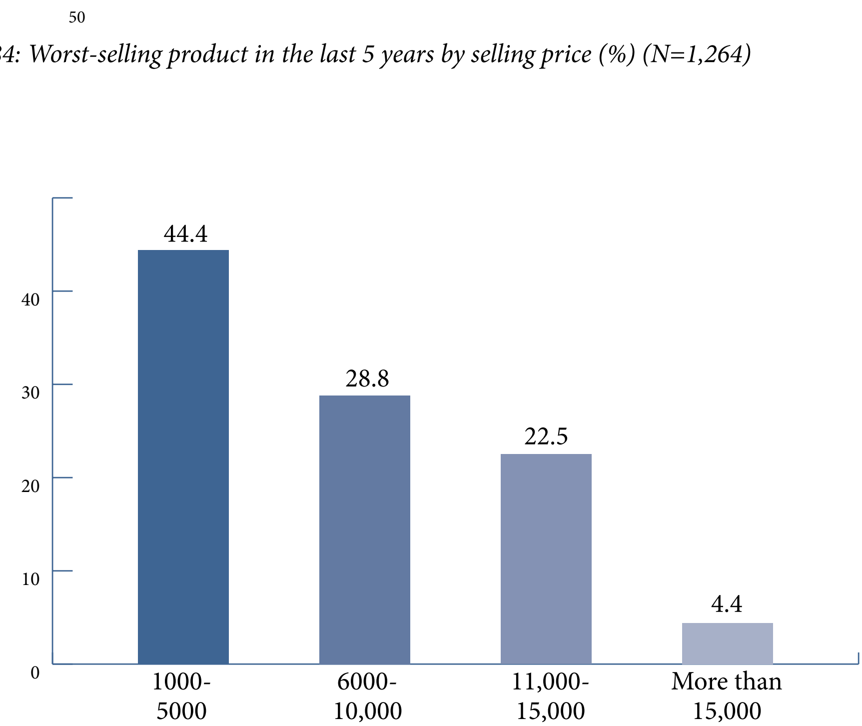
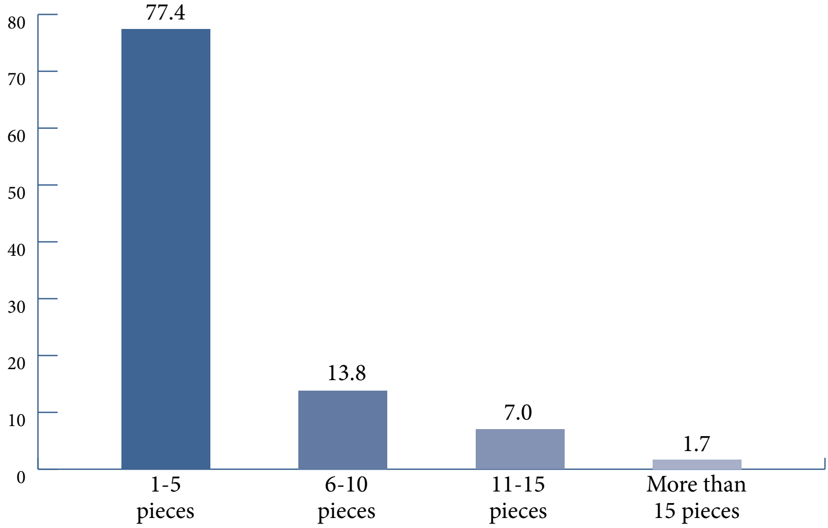


Figure 85: Worst-selling product in last 5 years by quantity sold within a year (%) (N=1,264)



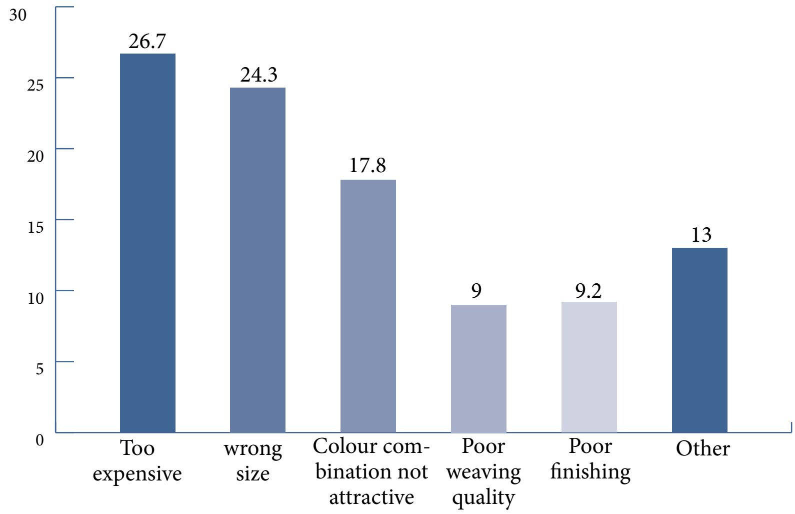
On the other hand, 20.8% or 1,264 of 6,077 of the respondents claimed that they had 'worst-selling products in the last 5 years'. (Fig 82, Appendix B12.9) For 36.6% or 463 of 1,264 of the respondents, '*Kushuthara*' was their 'worst-selling' product in the last 5 years, followed by '*Karchang*', - 22.6% or 286 respondents, 15.0% or 189 for '*Hor*', 12.3% or 156 for 'Bura', etc. (Fig 83, Appendix B12.10)

Selling price for the 'worst-selling product' in the last 5 years has been for 'Nu.1,000 – 5,000' as claimed by 44.4% or 561 of 1,264 of the respondents, followed by 28.8% or 364 respondents for 'Nu.6,000 – 10,000', and 22.5% or 284 for 'Nu.11,000 – 15,000'. (Fig 84, Appendix B12.11)

Contrary to 'best-selling' products, 77.4% or 978 of 1,264 of the respondents claimed to have sold '1-5 pieces' within one year of the 'worst-selling' products. Similarly, only 13.8% or 175 of the respondents claimed to have sold '6-10 pieces' within one year. (Fig 85, Appendix B12.12)

Q. What do you think are the reasons that this product did not sell well? Please tick (√) all that are relevant. *[Too expensive/ Wrong size/ Colour combination not attractive/ Poor weaving quality/ Poor finishing/ Other]*

Figure 86: Reasons that the product did not sell well (%) (N=1,309)



For the products not selling well, reasons stated varied including, 26.7% or 350 of 1,309 of the respondents stating as 'too expensive', 'wrong size' (24.3% or 318), 'colour combination not attractive' (17.8% or 233), etc. (Fig 86, Appendix B12.13)

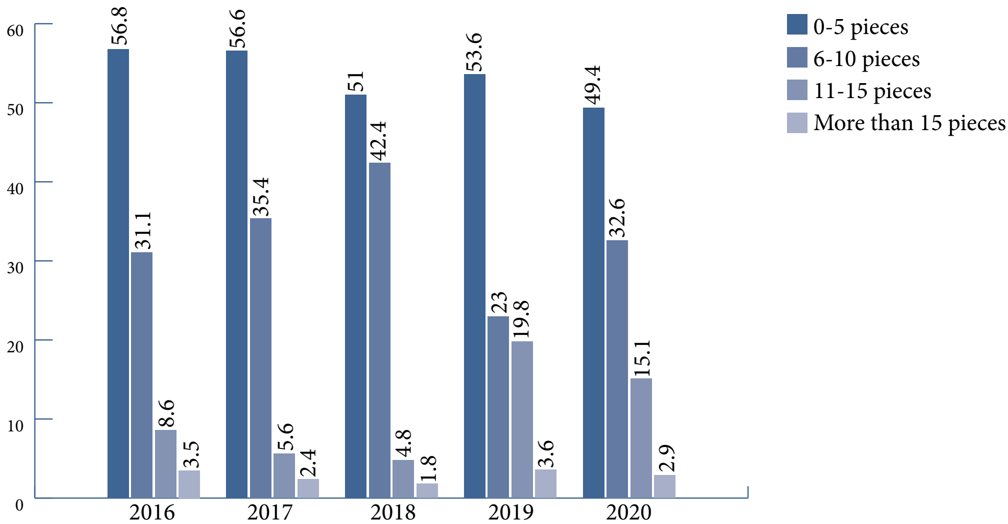
v) In a 5-year period – Quantity of textiles produced, Income from sale, Changes in sale

Q. On the annual average, can you please recall the total quantity you produced within the past 5 years? (With reference to the most frequent types of textiles produced in the last 5 years) *[2016/ 2017/ 2018/ 2019/2020]*

Table 1: Average quantity of textile products sold in last 5 years

Years	Percent/ Frequency	0 – 5 pieces	6 – 10 pieces	11 – 15 pieces	More than 15 pieces	Total
2016	Percent	56.8	31.1	8.6	3.5	**100.0**
	Frequency	1,563	856	236	96	**2,751**
2017	Percent	56.6	35.4	5.6	2.4	**100.0**
	Frequency	1,256	785	124	53	**2,218**
2018	Percent	51.0	42.4	4.8	1.8	**100.0**
	Frequency	1,325	1,102	125	46	**2,598**
2019	Percent	53.6	23.0	19.8	3.6	**100.0**
	Frequency	1,524	654	564	102	**2,844**
2020	Percent	49.4	32.6	15.1	2.9	**100.0**
	Frequency	1,496	987	459	88	3,030

Figure 87: Average quantity of textile products sold in last 5 years (%)



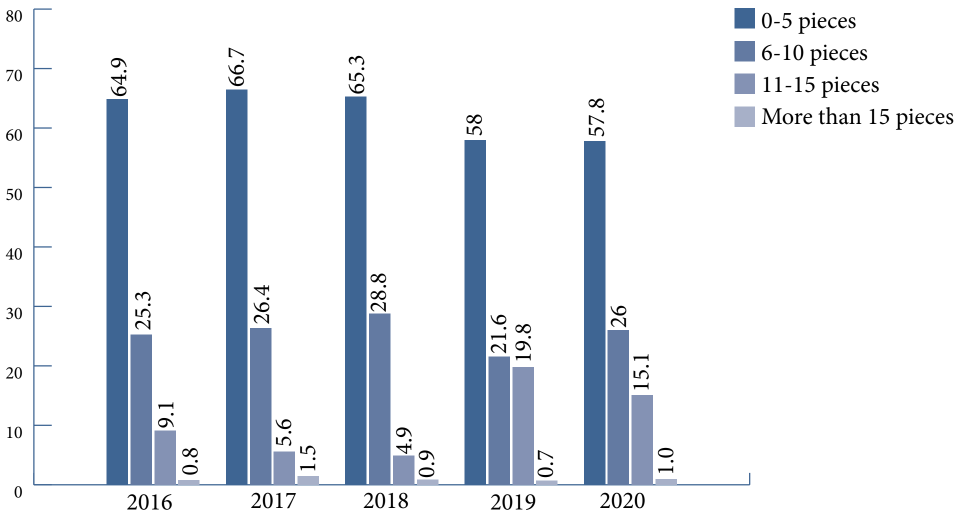
On an annual average, the highest quantity of textile products sold in the last 5 years has reportedly been '0 – 5 pieces' averaging 53.5% [ranging from 49.4% (2020) to 56.8% (2016)], followed by an average of 32.8% for '6 – 10 pieces' [ranging from 23.0% (2019) to 42.4% (2018)], 10.8% for '11 – 15 pieces' [ranging from 4.8% (2018) to 19.8% (2019)], and 2.8% for 'more than 15 pieces' [ranging from 1.8% (2018) to 3.6% (2019). (Table 1, Fig 87)

Q. On the annual average, can you recall your income from sales of your textiles within the last 5 years? (With reference to most frequent types of textiles produced in the last 5 years) *[2016/ 2017/ 2018/ 2019/2020]*

Table 2: Average price of textile products sold in last 5 years

Year	Percent/ Frequency	Nu. 0-50,000	Nu. 51,000-100,000	Nu. 101,000-150,000	More than Nu. 150,000	Total
2016	Percent	64.9	25.3	9.1	0.8	**100.0**
	Frequency	1,785	696	249	21	**2,751**
2017	Percent	66.5	26.4	5.6	1.5	**100.0**
	Frequency	1,476	585	124	33	**2,218**
2018	Percent	65.3	28.8	4.9	0.9	**100.0**
	Frequency	1,697	749	128	24	**2,598**
2019	Percent	58.0	21.6	19.8	0.7	**100.0**
	Frequency	1,649	614	562	19	**2,844**
2020	Percent	57.8	26.0	15.1	1.0	**100.0**
	Frequency	1,751	789	459	31	**3,030**

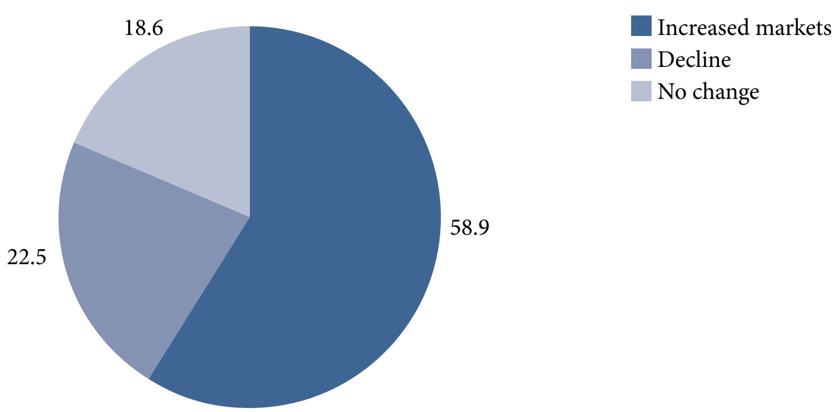
Figure 88: Average price of textile products sold in last 5 years (%)



Similarly, the average annual price of textile sold in the last 5 years has been annual average of 62.5% for the price range of 'Nu.0 – 50,000' [ranging from 57.8% (2020) to 66.5% (2017)], followed by annual average of 25.6% for the price range 'Nu.51,000 – 100,000' [ranging from 21.6% (2019) to 28.8% (2018)], annual average of 10.9% for price range of 'Nu.101,000 – 150,000' [ranging from 4.9% (2018) to 19.8% (2019)], and annual average of 1.0% for price range of 'more than Nu.150,000' [ranging from 0.7% (2019) to 1.5% (2017)]. (Table 2, Fig. 88)

Q. Do you think that the sales of your products have changed in the past 5 years? Please tick (√) ONE only. *[Increased Markets/ Declined/ No change]*

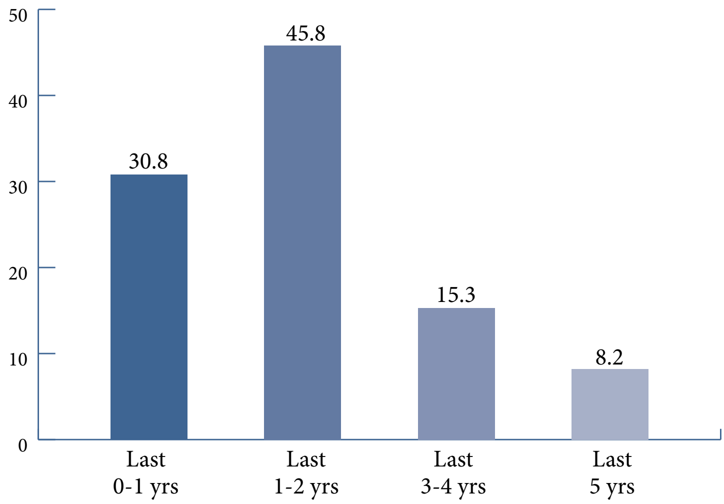
Figure 89: Whether or Not sales of products have changed in the last 5 years (%) (N=3,183)



58.9% or 1,875 of the total respondents opined that there have been 'increased markets' in the past five years. In contrast, 22.5% or 716 of the respondents viewed that the sale has 'declined', whereas 18.6% or 592 feel that the sale has remained the same. (Fig 89, Appendix B12.14)

Q. **If YES**, over what period of time have you seen this change? Please tick (√) ONE only. *[Last 0 – 1 year/ Last 1 – 2 years/ Last 3 – 4 years/ Last 5 years]*

Figure 90: Change in sales of products in the past 5 years by time period (%) (N=3,183)



As to when the change has actually taken place, while 45.8% or 1,457 of the respondents claim that the change has taken place in the 'last 1 – 2 years', 30.8% or 979 of the respondents feel that it has happened in the 'last 0 – 1 year', followed by 15.3% or 486 who have stated that it has taken place in the 'last 3 – 4 years'. Yet, 8.2% or 261 indicate that the change has taken place in the 'last 5 years'. (Fig 90, Appendix B12.15)

3.5.9 Payment Procedure

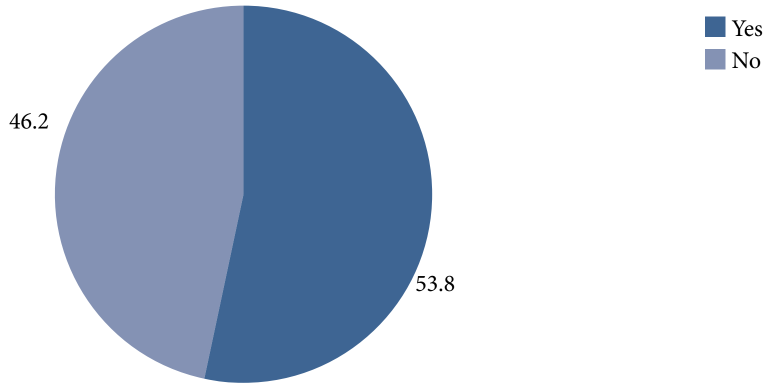
i) Making Payments

Q. Do you have problems paying suppliers/workers/creditors? Why? Please tick (√) all that applies.

If YES – *[No cash in hand/ No access to financial resources/ Lack of sales/ Sales with poor profit/ Problems in sales turnover or cash flow/ Lack of credit/ I don't know/ Other]*

If NO – *[Cash readily available in hand/ Easy access to cash or savings/ Good sales with good profit/ Prompt payments from customers/ Easy access to loans with low or no interest/ Exchange with labour or materials as payments/ I don't know/ Other]*

Figure 91: Whether or Not weavers have problems in paying their suppliers, workers, creditors, etc. (%)



Data shows that while over 45% of the respondents have no problems in paying their suppliers, workers, creditors, etc., about 55% of the respondents do have challenges. (Fig 91)

Figure 92(a): Reasons for challenges in paying supplier/workers/creditors (%) (N=3,220)

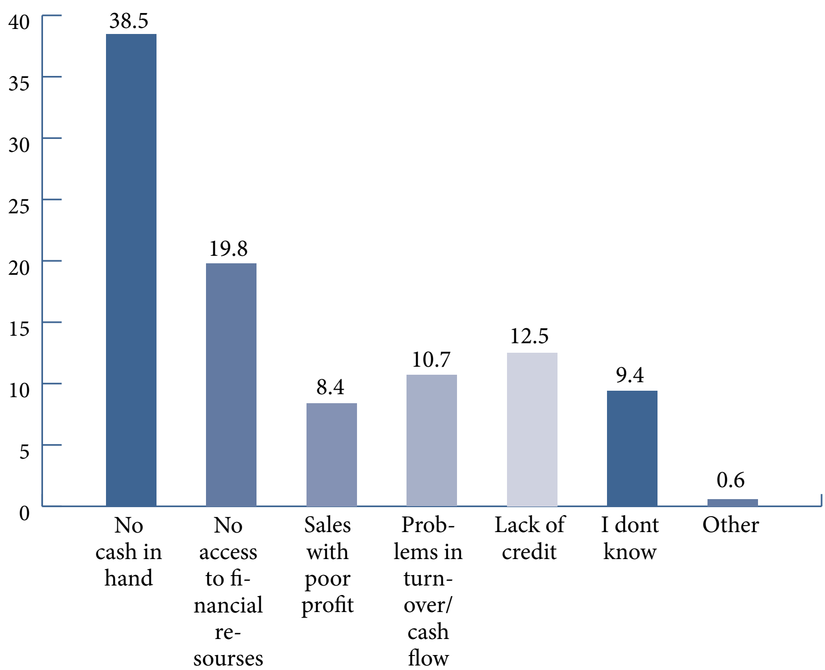
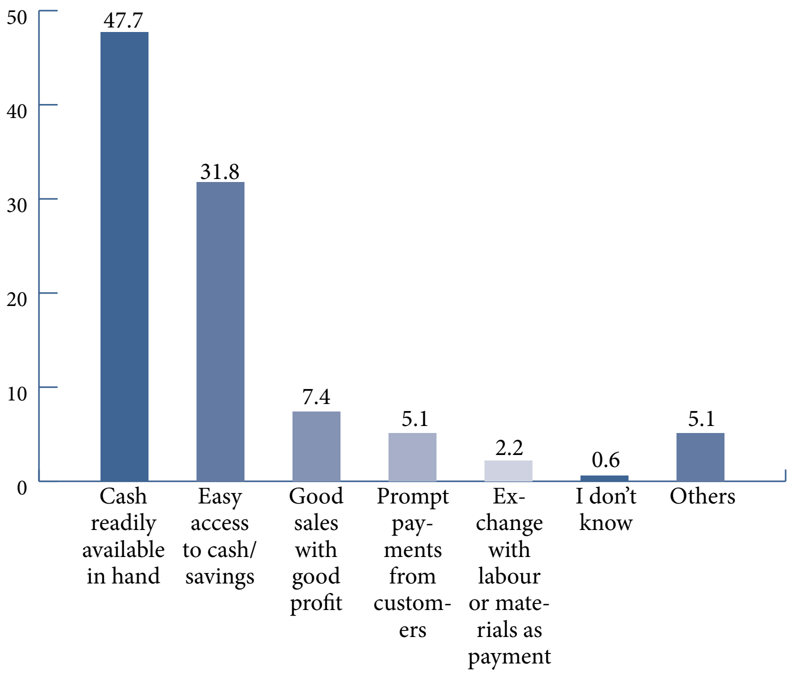


Figure 92(b): Reasons for not having difficulties in paying supplier/workers/creditors (%) (N=2,767)



Those who face challenges in paying suppliers/workers/creditors, 38.5% or 1,239 of 3,220 of the respondents are because of 'no cash in hand', followed by 19.8% or 637 with 'no access to financial resources' as well as 'lack of credit' (12.5% or 404). Challenges are because of 'problems in sales turnover or cash flow' (10.7% or 345) and 'sales with poor profit' (8.4% or 272). (Fig 92a, Appendix B13.1)

Respondents who said that they have no difficulties in paying their suppliers/workers/creditors, at 47.7% or 1,321 of 2,767 are because of having 'cash readily available in hand', followed by 31.8% or 879 having 'easy access to cash or savings'. 'Good sales with good profit' and 'prompt payments from customers' have also played a part in having less difficulties. (Fig 92b, Appendix B13.2)

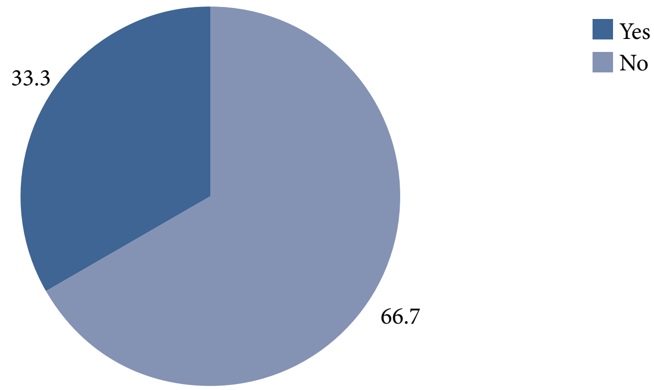
ii) Collecting Payments

Q. Do you have problems collecting payments from customers? Why? Please tick (√) all that applies.

If YES – *[Customers short of cash/ Payments not immediate or payment terms not favourable/ Difficult to locate middlemen to obtain payments/ Difficult to collect payments from family/friends/ Payments not in cash/ I don't know/ Other]*

If NO – *[Customers always pay in cash/ Payments immediate or payment terms favourable/ Middlemen trustworthy and payment is punctual/ Cash terms only/ I don't know/ Other]*

Figure 93: Whether or Not weavers have difficulties in collecting payments (%)



Data shows that while over 65% of the respondents do not have difficulties in collecting payments, about 35% of the respondents do have challenges. (Fig 93)

Figure 94(a): Reasons for challenges in collecting payments from customers (%) (N=2,403)

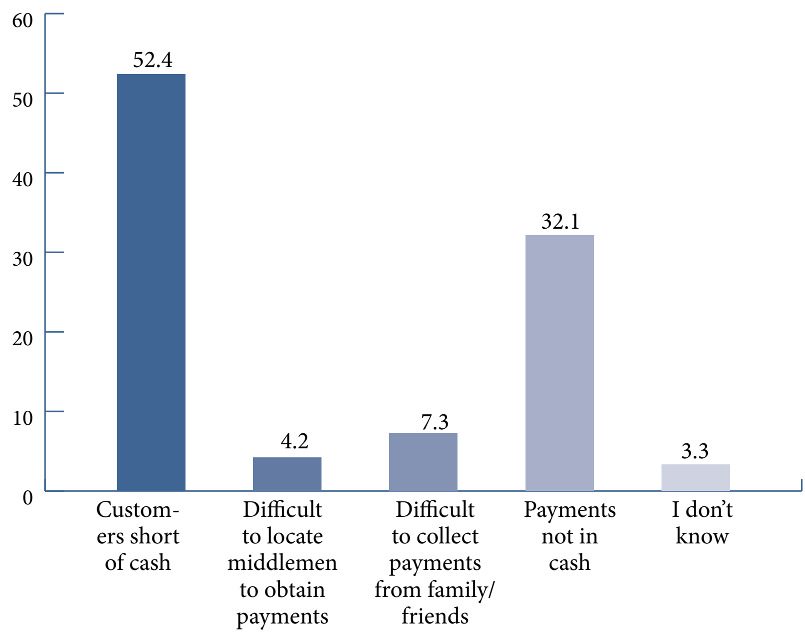
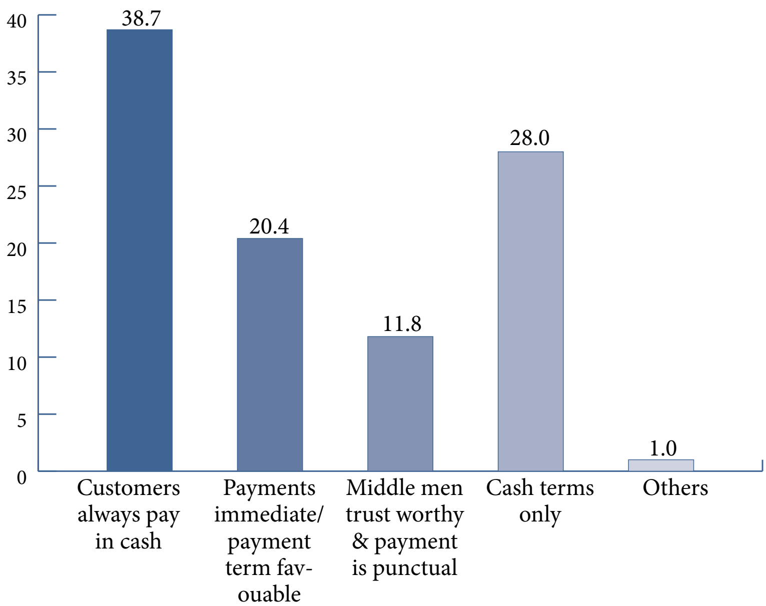


Figure 94(b): Reasons for not having difficulties in collecting payments from customers (%) (N=2,049)



With regards to facing challenges in collecting payments from customers, 52.4% or 1,260 of 2,403 of the respondents said it is because of 'customers short of cash', followed by 32.1% or 772 of the respondents indicating 'payments not in cash' as the reason. 'Difficult to collect payments from family / friends' and 'difficult to locate middlemen to obtain payments' are the other two factors affecting them. (Fig 94a, Appendix B13.3)

However, on the other hand, there are respondents who reported having no difficulties in collecting payments from their customers and said factors such as – 'customers always pay in cash' (38.7% or 1,869 of 4,824), 'cash terms only' (28.0% or 1,352), 'payments immediate / payment terms favourable' (20.4% or 986) and 'middlemen trustworthy and payments are punctual' (11.8% or 568). (Fig 94b, Appendix B13.4)

iii) Credit terms

Q. Do you provide credit terms to your customers? Please tick (√) ONE only. *[Always/ Definitely not/ It depends]*

If YES, what are the terms? Please tick (√) ONE only. *[Within a week/ Within a month/ Within 3 months/ Within 6 months/ Within a year/ No fixed term]*

Figure 95: Whether or Not credit terms are provided to the customers (%) (N=2,049)

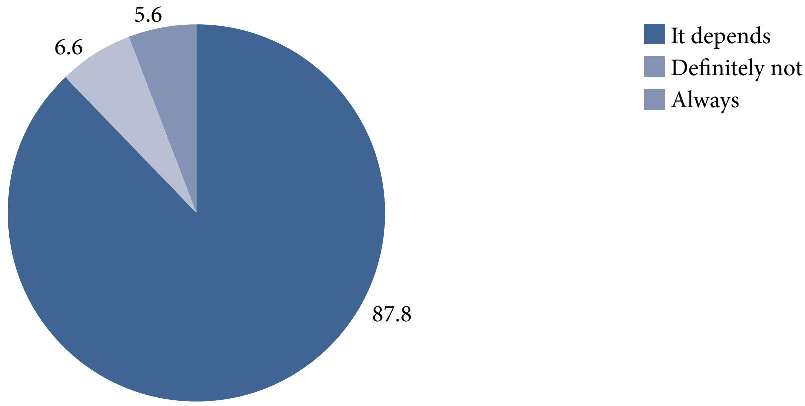
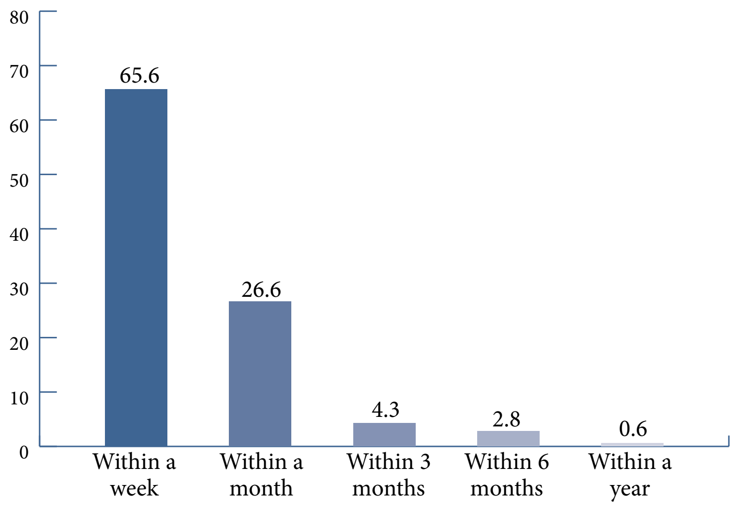


Figure 96: Period of credit terms (%) (N=2,049)

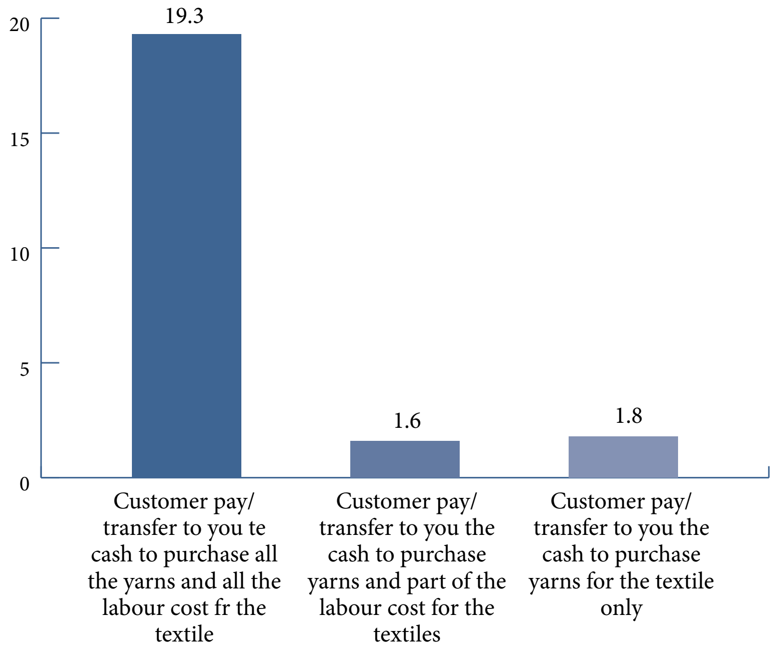


With regards to availing credits, 6.6% or 136 of the total respondents provide credit terms 'always' while 5.6% or 114 'definitely not' and 87.8% or 1,799 of the respondents indicated providing credit terms on certain conditions. (Fig 95, Appendix B13.5) As and when credit terms are provided, while 65.6% or 1,345 of 2,049 of the respondents provide for 'within a week', 26.65 or 546 of the respondents do it for 'within a month'. (Fig 96, Appendix B13.6)

iv) Commissioned to weave – Most common practice

Q. When you are commissioned to weave a piece of textile do you: Please tick (√) ONE only. *[Obtain no deposits from your customers/ Customers pay or transfer to you the cash to purchase all the yarns for the textile only/ Customers pay or transfer to you the cash to purchase all the yarns and part of the labour cost for the textile/ Customers pay or transfer to you the cash to purchase all the yarns and all the labour cost for the textiles/ Other]*

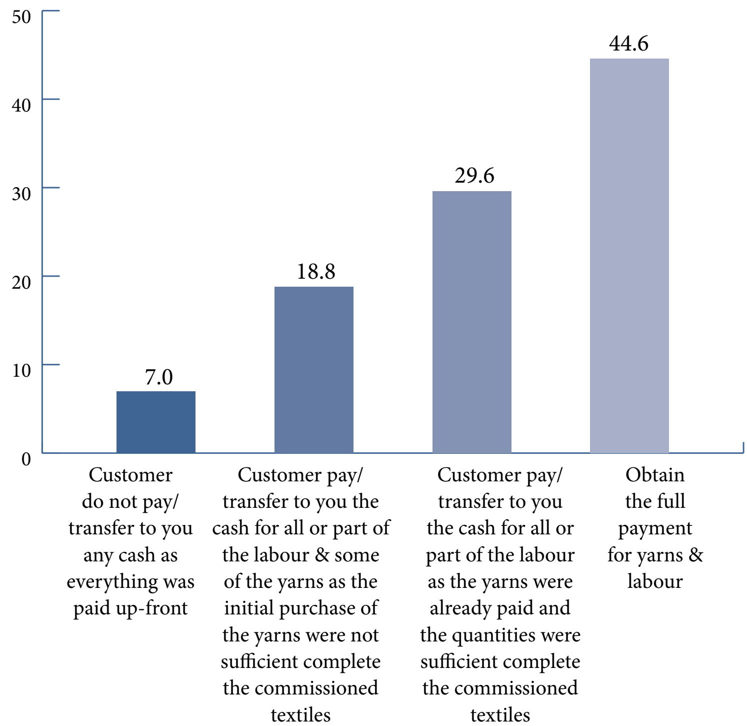
Figure 97: Payment for the commissioned weaving (5) (N=256)



As to making payment as and when weaving is commissioned, as reported by 256 of 6,077 of the respondents, about 20% (49) get paid the cost of all yarns and labour cost for the textiles, about 40% (97) get paid all cost of yarn and part of the labour cost and 45% (110) stated that they get paid only for the cost of all yarns. (Fig 97, Appendix B13.7)

Q. When you complete the commissioned textiles, do you: Please tick (√) ONE only. *[Obtain the full payment for yarns and labour/ Customers pay or transfer to you the cash for all or part of the labour and some cost of the yarns as the initial purchase of the yarns was not sufficient to complete the commissioned textiles/ Customers pay or transfer to you the cash for all or part of the labour as the yarns were already paid and quantities were sufficient to complete the commissioned textiles/ Customer do not pay or transfer to you any cash as everything was paid up-front/ Other]*

Figure 98: Payment upon completion of the commissioned weaving (%) (N=2,344)

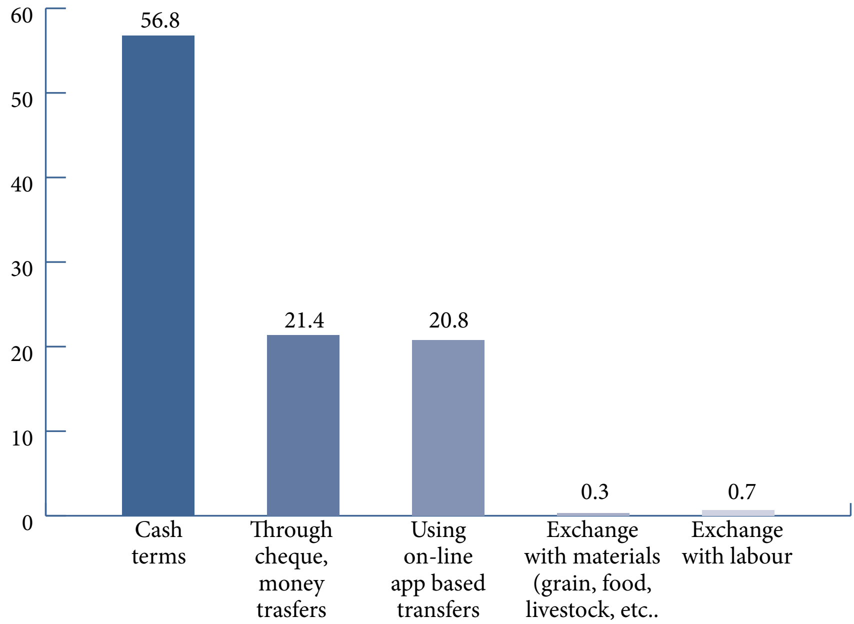


Upon completion of the commissioned weaving, while 44.6% or 1,046 of the total respondents obtain 'full payment for yarns and labour', 29.6% or 694 respondents would pay for 'all or part of the labour as the yarns were already paid and the quantities were sufficient to complete the commissioned work'. Further, 18.8% or 440 respondents would pay 'all or part of the labour and some of the yarn as the initial purchase of the yarns were not sufficient to complete the commissioned textiles'. (Fig 98, Appendix B13.8)

v) Mode of payment

Q. How do you usually get paid? Means of payment. Please tick (√) ONE only. *[Cash terms/ Through cheque, money transfers/ Using online app-based transfers/ Exchange with materials (grain, food, livestock, etc.)/ Exchange with labour/ Other]*

Figure 99: Mode of payment (%) (N=4,750)

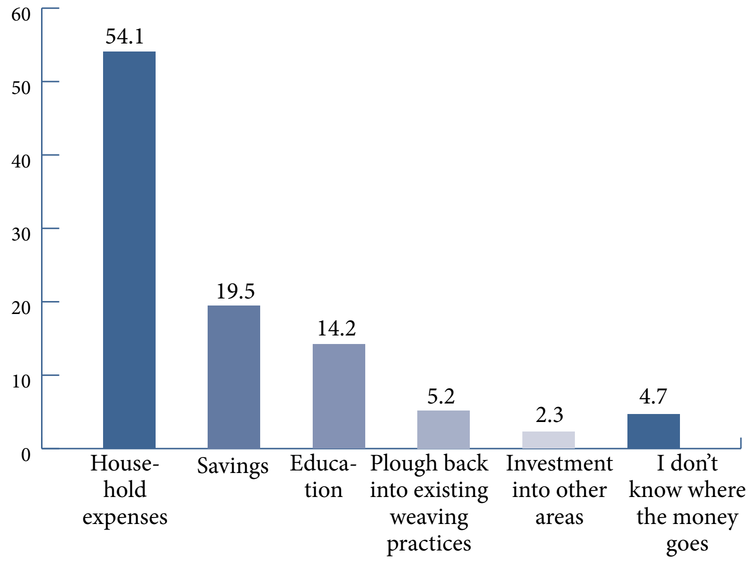


When it comes to payment, while 56.8% or 2,698 of the total respondents indicated paying in 'cash terms', 21.4% or 1,015 indicated paying 'through a cheque, money transfer', and 20.8% or 986 of the respondents indicated paying it 'using online app-based transfers'. (Fig 99, Appendix B13.9)

vi) Usage of income or profit generated

Q. How is the income/profit generated usually used? Please tick (√) ONE only. *[Household expenses/ Savings/ Education/ Plough back into existing weaving practices/ Investment into other areas/ I don't know where the money goes/ Other]*

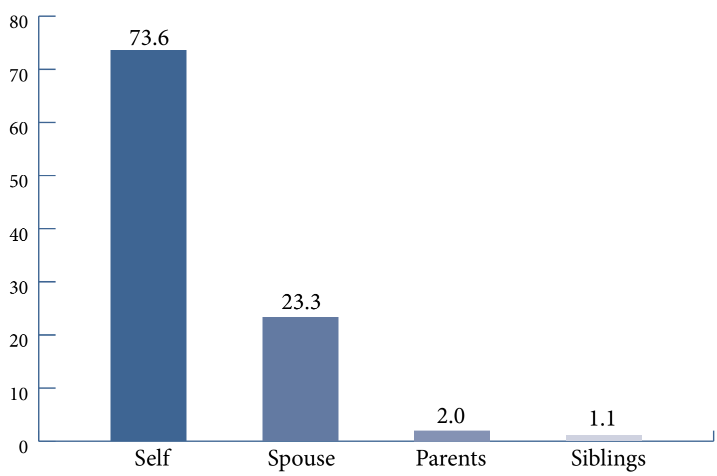
Figure 100: Usual usage of income/profit generated (%) (N=4,907)



With regards to usage of income or profit generated from the sale of textile products, 54.1% or 2,654 of the total respondents indicated using on 'household expenses', followed by 19.5% or 956 for 'savings', 14.2% or 697 for 'education', etc. Even though small, some are 'ploughed back into weaving' (5.2% or 256) and 'invested into other areas' (2.3% or 113). Yet, another group (4.7% or 231) have no idea as to how the income generated is used. (Fig 100, Appendix B13.10)

Q. Who makes the decision on the usage of the income? Please tick (√) ONE only. *[Self/ Spouse/ Parents/ Siblings/ Relatives/ Business partner/ Other]*

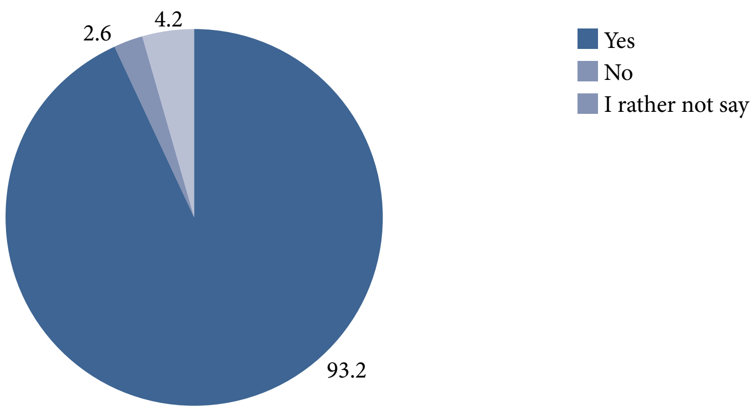
Figure 101: Decision-making on usage of the income generated (%) (N=4,118)



Majority of the weavers seem to be in charge of making decisions on usage of the income generated, as indicated by 73.6% or 3,029 of the total respondents as 'self', followed by 23.3% or 959 'spouse'. 'Parents' and 'siblings' have also been indicated as having some decision-making roles (Fig 101, Appendix B13.11)

Q. Are you happy with this decision-making? Please tick (√) ONE only. *[Yes/ No/ I rather not say]*
If NO, *why?*

Figure 102: Satisfaction with the decision-making process (%) (N=2,308)



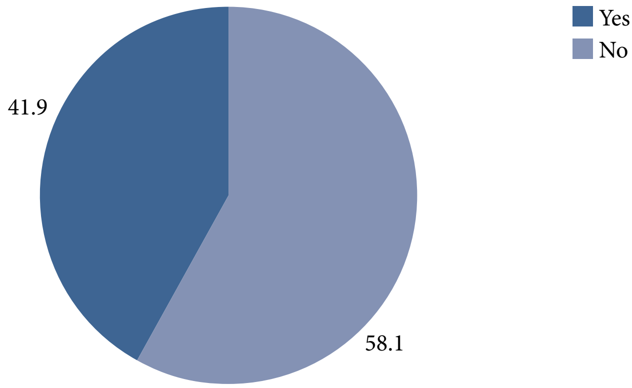
The survey shows that 93.2% or 2,152 of the total respondents were happy with the decision-making process on the usage of income generated. A small percentage have indicated either 'No' (2.6% or 59) or would 'rather not say' (4.2% 97) indicating some issues. A small group who indicated not being satisfied with the decision-making process did not provide any reasons for their dissatisfaction. (Fig 102, Appendix B13.12)

3.5.10 Packing for Delivery

i) Delivery of products

Q. Do you sell your products far away from where you make the products? Please tick (√) ONE only. *[Yes/ No]*

Figure 103: Whether or Not textile products are sold in far away places (%) (N=4,57)



On whether or not products are sold to some faraway places, whereas 41.9% or 1,698 of the total have been affirmative, 58.1% or 2,359 of the total respondents have indicated otherwise, i.e., 'No', meaning products are generally sold around in the locality. (Fig 103, Appendix B14.1)

Q. Is it difficult for you to deliver your products to other regions? Please tick (√) ONE only. *[Yes/ No]*

If YES, please tick (√) all that applies. *[Lack of transportation (vehicles)/ Lack of roads/ Lack of labour/ Lack of knowledge/ High cost/ I don't know/ Other]*

Figure 104(a): Whether or not there are difficulties in delivering their products to other regions (%) (N=4,057)

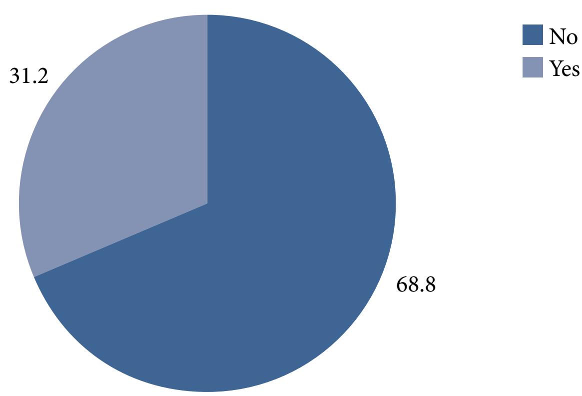
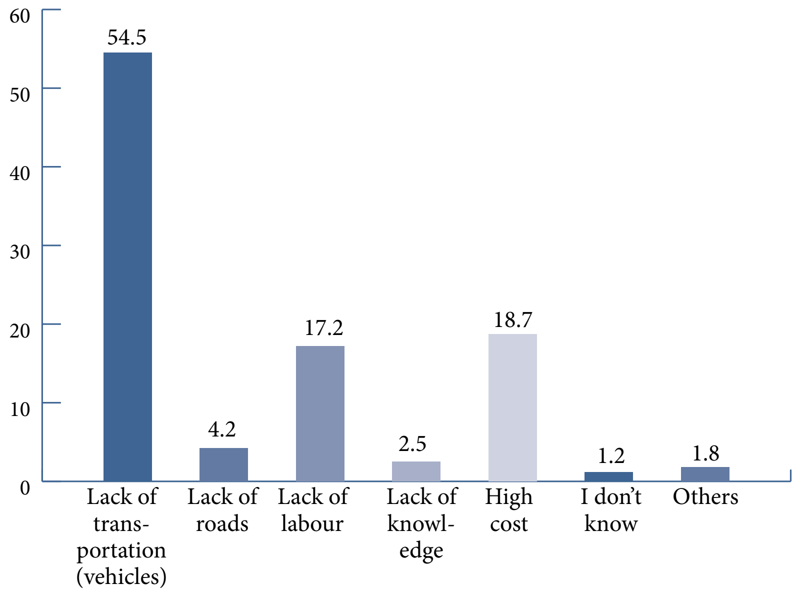


Figure 104(b): Reasons for difficulties in delivering their products to other regions (%) (N=1,265)



In terms of whether or not there are challenges in delivering their products to other regions, 68.8% or 2,792 of 4,057 of the respondents have indicated 'No'. However, 31.2% or 1,265 of the respondents have indicated having some difficulties in delivering their products to other regions, which may be important to note. (Fig 104a, Appendix B14.2)

One of the main reasons associated with difficulties in delivering their products ~~to others~~ is 'lack of transportation (vehicles)' as indicated by 54.5% or 689 of 1,265 of the respondents, followed by 'high cost' (18.7% or 236), 'labour cost' (17.2% or 217), etc. (Fig 104b, Appendix B14.3)

ii) Packing the products

Q. Do you pack your products for delivery? Please tick (√) ONE only. *[Yes/ No/ Sometimes]*

If YES, how?

Figure 105: Whether or not they pack their products for delivery (%) (N=1,928)

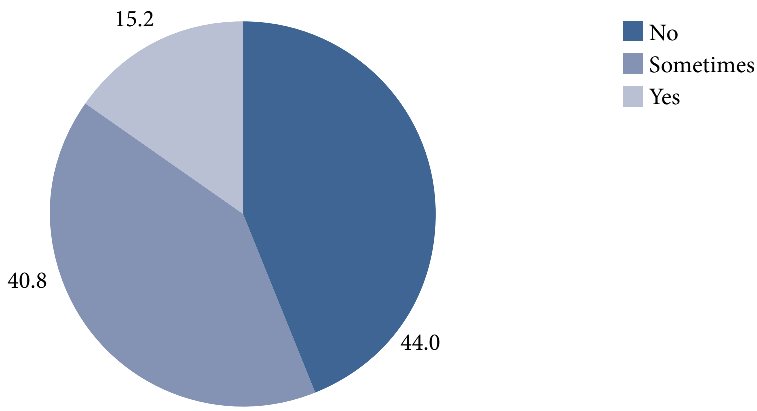
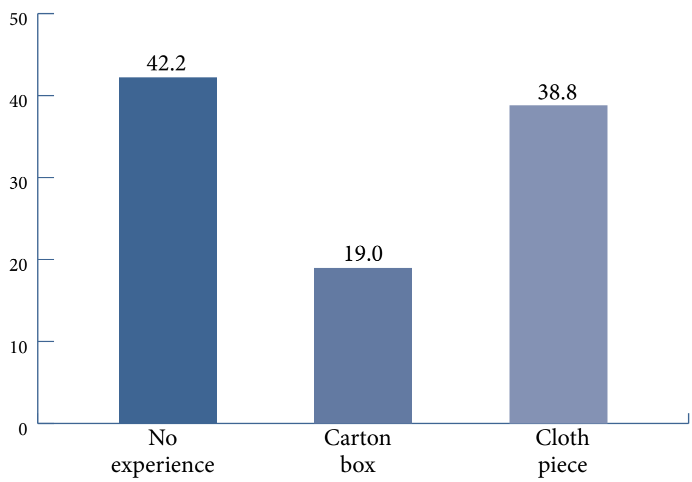


Figure 106: Three most commonly used packing materails (%) (N=294)



As to whether or not the respondents pack their products for delivery, while 44.0% or 848 of 1,928 stated 'No', 40.8% of 786 respondents stated 'sometimes', and 15.2% or 294 respondents actually packing their products for delivery. (Fig 105, Appendix B14.4) The most common packing materials are 'plastic bag' (42.2% or 124), 'cloth piece' (38.8% or 114), and 'carton box' (19.0% or 56). (Fig 106, Appendix B14.5)

Q. Are there any current problems with packing? What are the problems? Please tick (√) ONE only. *[Yes/ No]*

If YES, please tick (√) all that applies. *[No experience/ Lack of packing materials/ High cost of packing materials/ Lack of labour/ I don't know/ Other]*

Figure 107: Whether or Not there are current challenges with packing (%) (N=1,806)

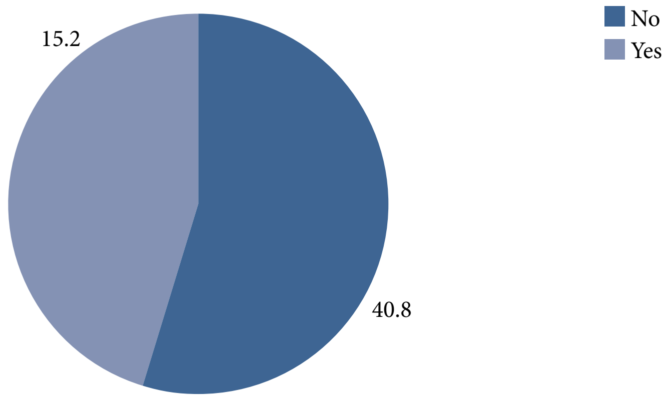
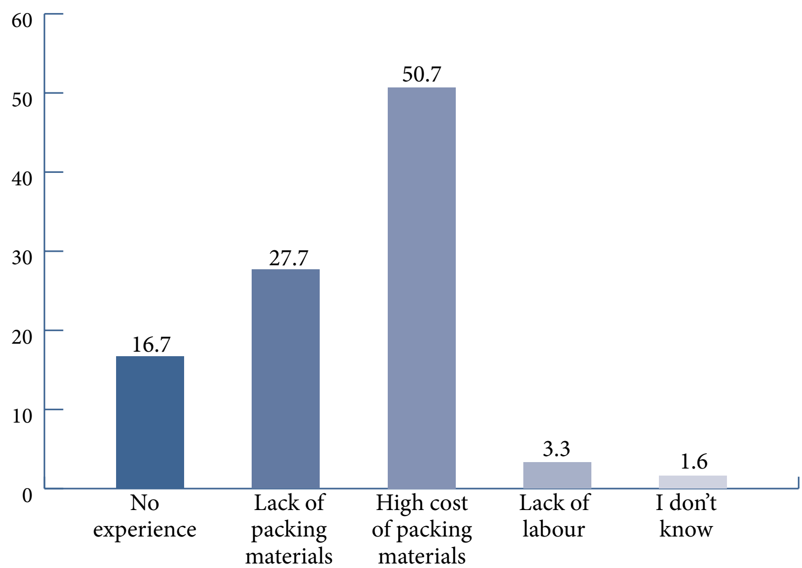


Figure 108: Reasons for the packing challenges (%) (N=816)



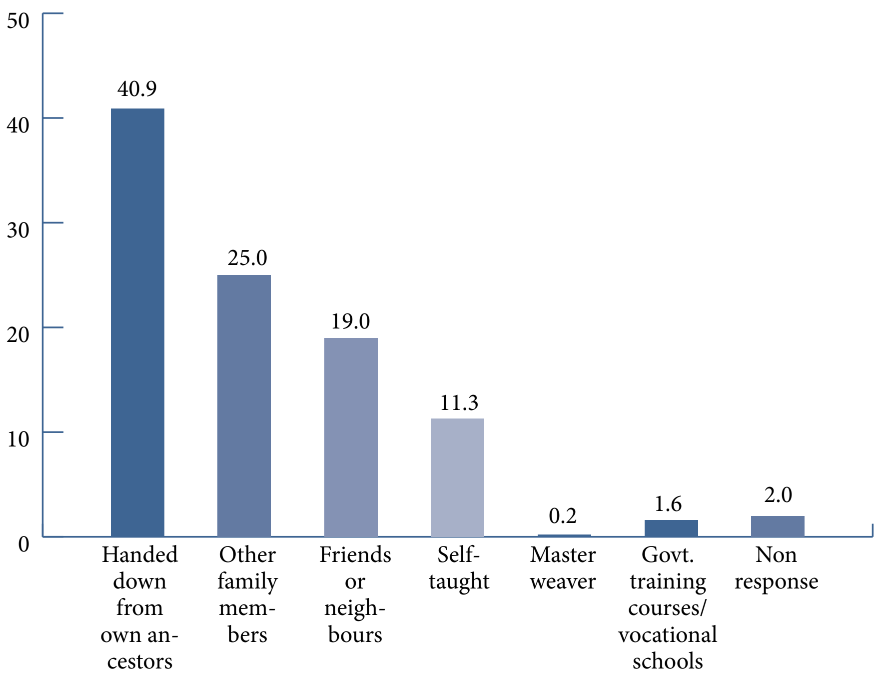
It is significant that 45.2% or 816 of 1,806 of the respondents indicated that they do have challenges with packing their products for delivery. (Fig 107, Appendix B14.6) Reasons for their packing challenges are topped by 'high cost of packing materials' (50.7% or 414), followed by 'lack of packing materials' (27.7% or 226), 'no experience' (16.7% or 136), etc. (Fig 108, Appendix B14.7)

3.6 Skills and Education

i) Learning weaving skills, passing on the tradition

Q. Whom did you learn the skills from? Please tick (√) ONE only. *[Handed down from own ancestors/ Other family members/ Friends or neighbours/ Self-taught/ Master weaver/ Government training courses or vocational schools/ Other]*

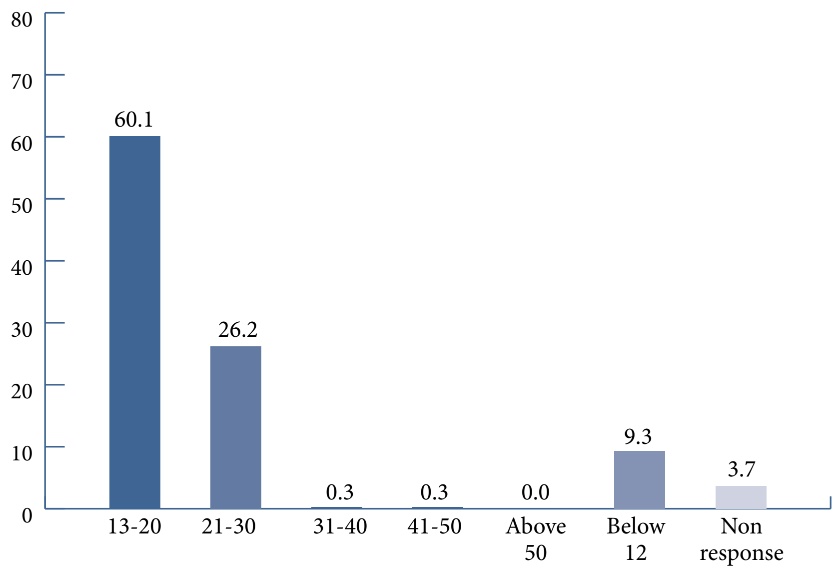
Figure 109: Weaving skills learned from (%) (N=6,077)



Weaving skills seem to be acquired largely from family members. 40.9% or 2,488 of the respondents have indicated having learned weaving skills from being 'handed down from own ancestors'. Additionally, 25% or 1,519 of the total respondents indicated having learned from 'other family members'. While 19% or 1,157 of the respondents have learned from their 'friends or neighbours', 11.3% or 687 of the respondents were reportedly 'self-taught'. (Fig 109, Appendix B15.1)

Q. At what age did you start weaving? Please tick (√) ONE only. *[Below 12/ 13–20/ 21–30/ 31–40/ 41–50/ Above 50]*

Figure 110: Age of starting to weave (%) (N=6,077)



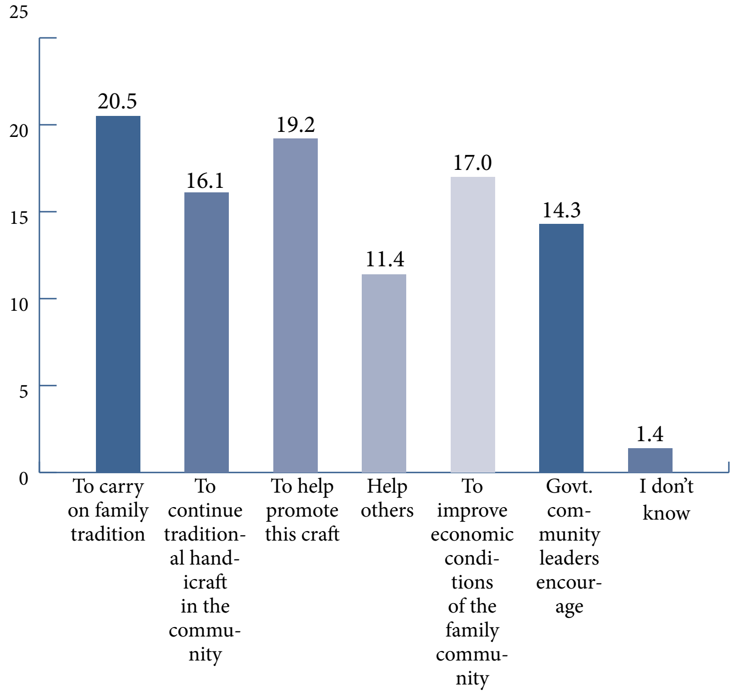
While the majority of the respondents learned weaving within the age range of '13 – 20 years' (60.1% or 3,654), 26.2% or 1,591 of respondents have learned to weave while they were '21 – 30 years' old. Some have learned to weave even as early as 'below 12 years' as reported by 9.3% or 567 of the respondents. (Fig 110, Appendix B15.2)

Q. Do you hope to pass your skills to others? Why? Please tick (√) all that applies.

If YES – *[To carry on family tradition/ To continue traditional handicraft in the community/ To help promote this craft/ Help others/ To improve economic conditions of the family or community/ Government or community leaders encourage/ I don't know]*

If NO – *[Low prestige/ Nobody is interested to learn/ Does not generate enough money/ Does not help improve economic conditions of the family or community/ Government or community leaders do not encourage/ I don't know/ Other]*

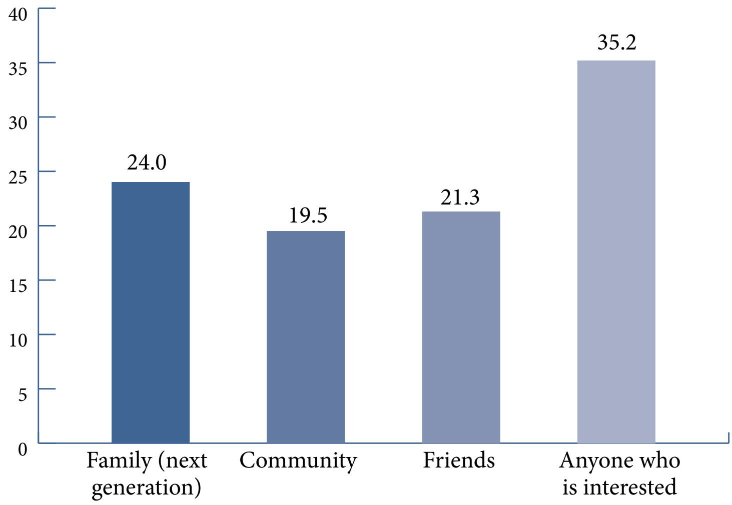
Figure 111: Reasons for passing on skills to others (%) (N=6,077)



As to whether or not they hope to pass on their weaving skills to others, reasons stated for doing so are varied. While over 35% said they will carry on the family tradition and continue traditional handicrafts in the community, slightly over 30% would like to promote this craft and help others. Further, while over 15% would like to do it for economic reasons for the family/community, about 15% would do because of the encouragement from the leaders. (Fig 111, Appendix B15.3)

Q. Who will you pass these skills to? Please tick (√) All that applies. *[Family (next generation)/ Community/ Friends/ Anyone who is interested/ Other]*

Figure 112: Perceived responsibilities for passing on the weaving skills (%) (N=6,077)



Data shows that perceived responsibilities to pass on the weaving skills is left to 'any who is interested' (35.2% or 2,138), followed by for 'family' (36.9% or 1,456), 'friends' (21.3% or 1,295), and 'community' (19.5% or 1,188) (Fig 112) Refer Appendix B15.4 for details.

ii) Improving skills

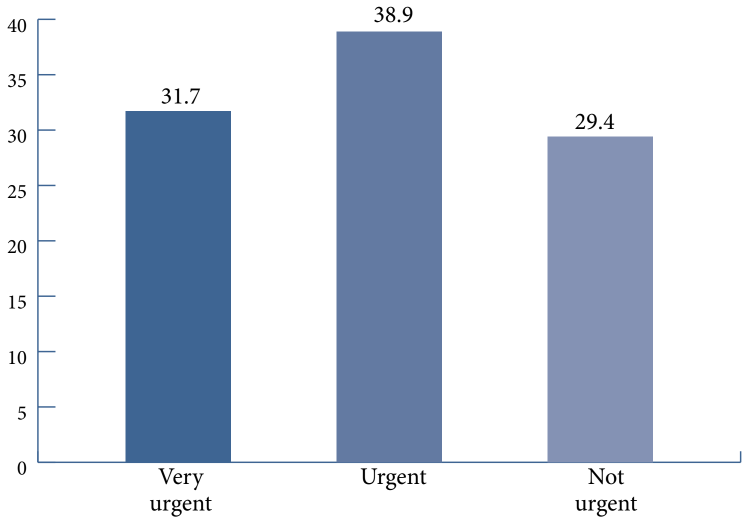
Q. What skills would you like to improve on and please list the priority for each? Please tick (√) all that applies. (1 – Very urgent, 2 – Urgent, 3 – Not urgent)

General Skills:
[General literacy/ General numeracy/ Personal hygiene]

Textile designing and technical skills:
[Contemporary textile weave design/ Traditional textile weave design/ Colour combinations/ Fibre knowledge/ yarn spinning and plying/ Natural dyeing techniques/ Upgrade existing weaving and textile production skills (On backstrap looms)/ New weaving techniques and textile production skills (on horizon frame looms or Meche looms)/ Textile finishing techniques]

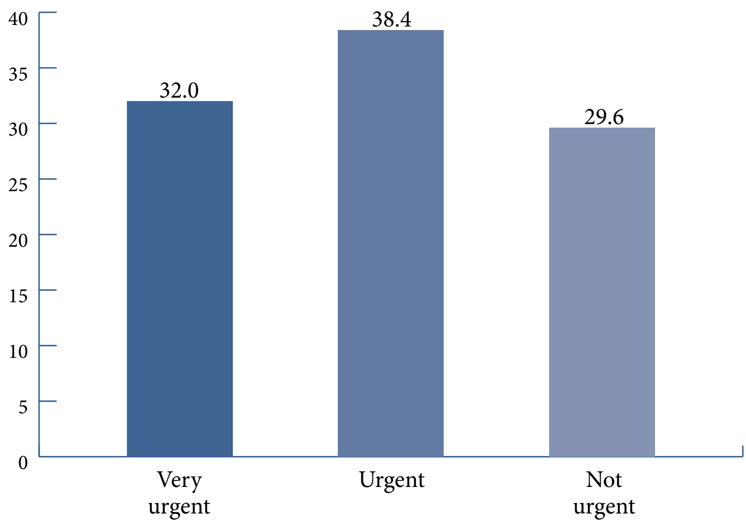
Business skills:
[Basic finance, accounting and budgeting/ Inventory, sales and marketing (including digital marketing)/ Production planning and time management]

Figure 113(a): Improving in General Skills: General literacy (%) (N=5,223)



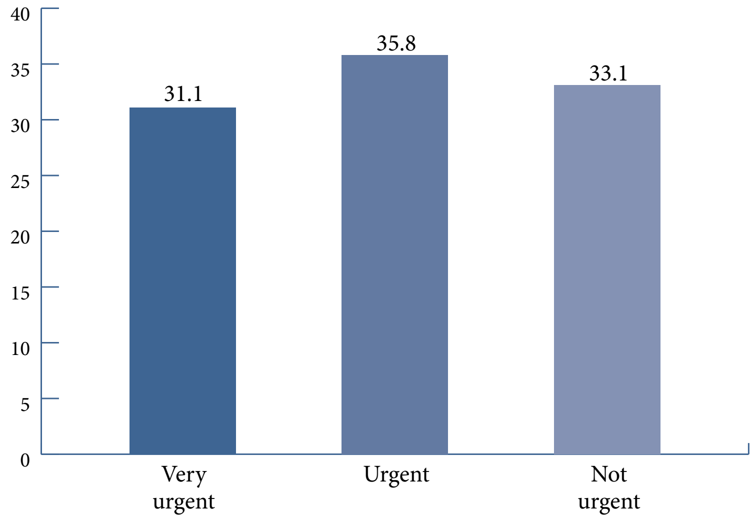
Data shows that while 70.6% (3,690) of the respondents consider improving skills in general literacy as either urgent or very urgent, 29.4% (1,533) do not consider it as urgent. (Fig 113a) Refer Appendix B15.6 for details.

Figure 113(b): Improving in General Skills: General Numeracy (%) (N=5,195)



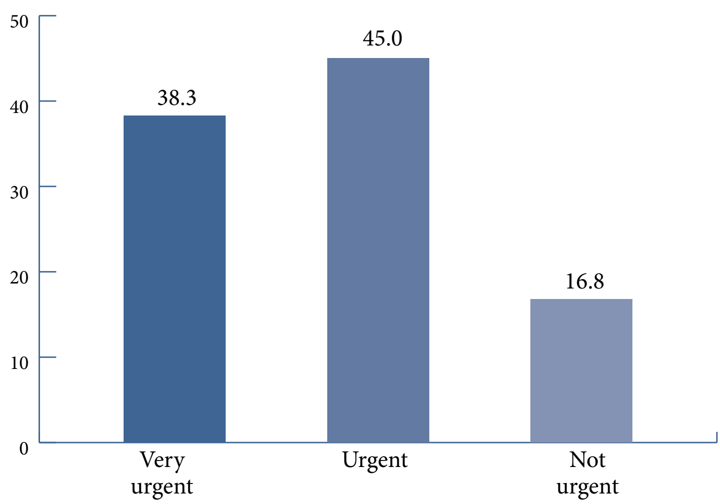
Data shows that while 70.4% (3,658) of the respondents consider improving skills in general numeracy as either urgent or very urgent, 29.5% (1,537) do not consider it as urgent. (Fig 113b) Refer Appendix B15.6 for details.

Figure 113(c): Improving in General Skills: Personal Hygiene (%) (N=5,194)



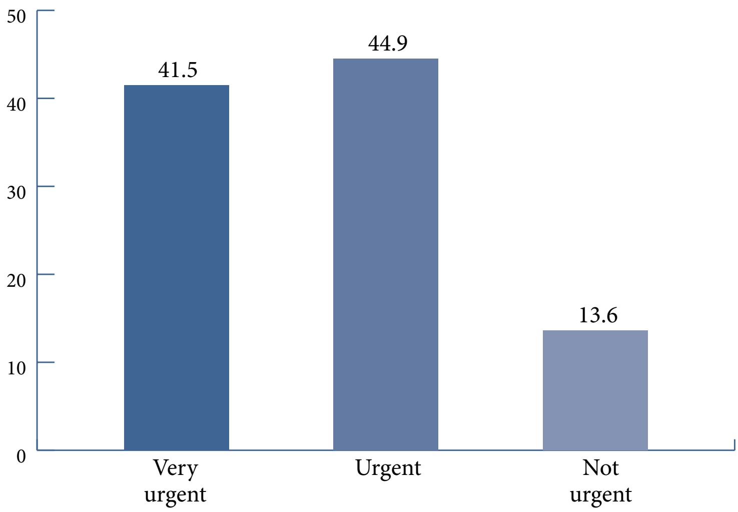
Data shows that while 66.9% (3,474) of the respondents consider improving skills in personal hygiene as either urgent or very urgent, 33.1% (1,720) do not consider it as urgent. (Fig 113c) Refer Appendix B15.6 for details.

Figure 114(a): Improving in Textile Designing and Technical Skills: Contemporary textile weave design (%) (N=5,234)



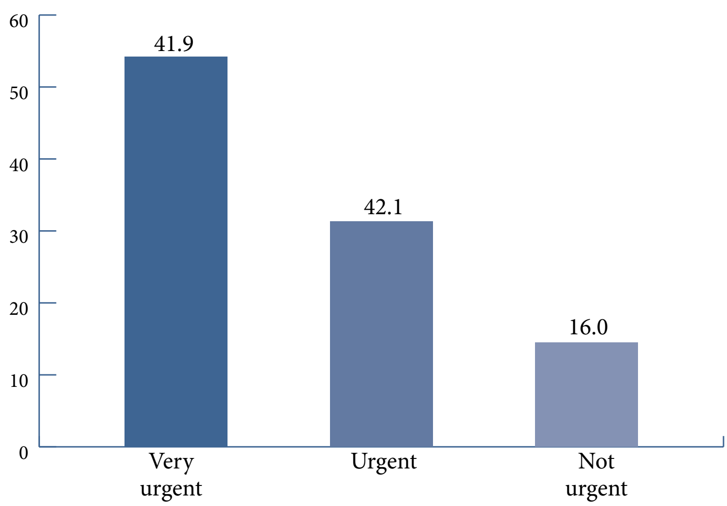
Data shows that while 83.3% (4,357) of the respondents consider improving skills in contemporary textile weave design as either urgent or very urgent, 16.8% (877) do not consider it as urgent. (Fig 114a) Refer Appendix B15.6 for details.

Figure 114(b): Improving in Textile Designing and Technical Skills: Traditional textile weave design (%) (N=5,249)



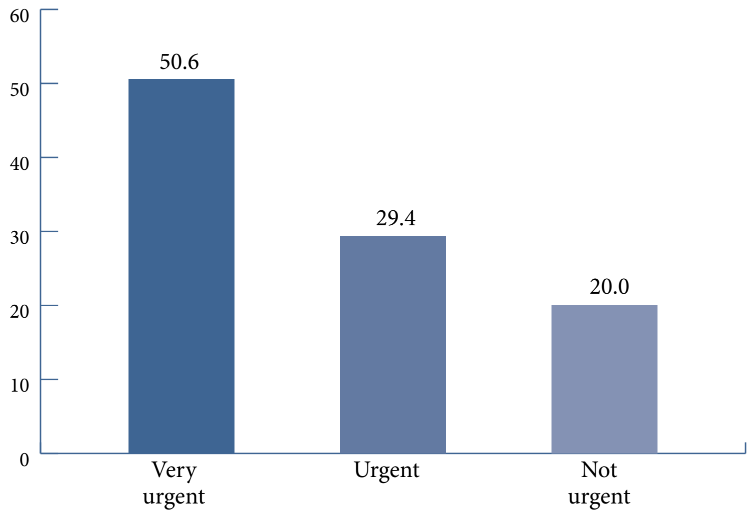
86.4% (4,536) of the respondents consider improving skills in traditional textile weave design as either urgent or very urgent while 13.6% (713) do not consider it as urgent. (Fig 114b) Refer Appendix B15.6 for details.

Figure 114(c): Improving in Textile Designing and Technical Skills: Colour combinations (%) (N=5,209)



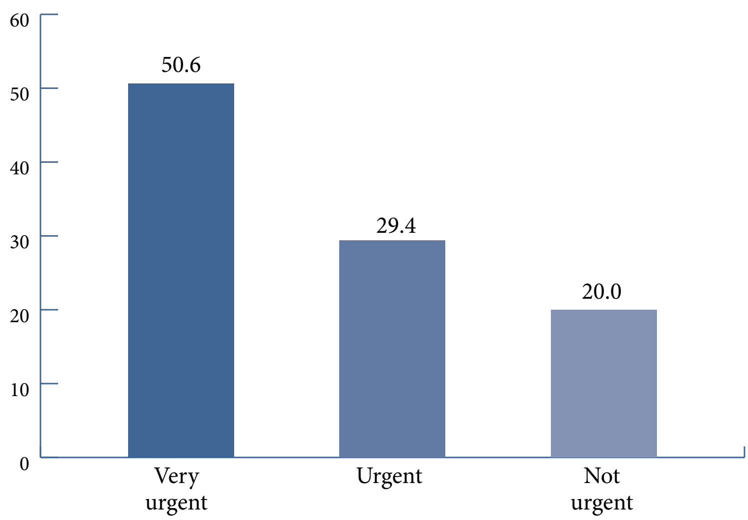
Data shows that 85.5% (4,454) of the respondents consider improving skills in colour combinations as either urgent or very urgent and 14.5% (755) do not consider it as urgent. (Fig 114c) Refer Appendix B15.6 for details.

Figure 114(d): Improving in Textile Designing and Technical Skills: Fibre knowledge (%) (N=4,979)



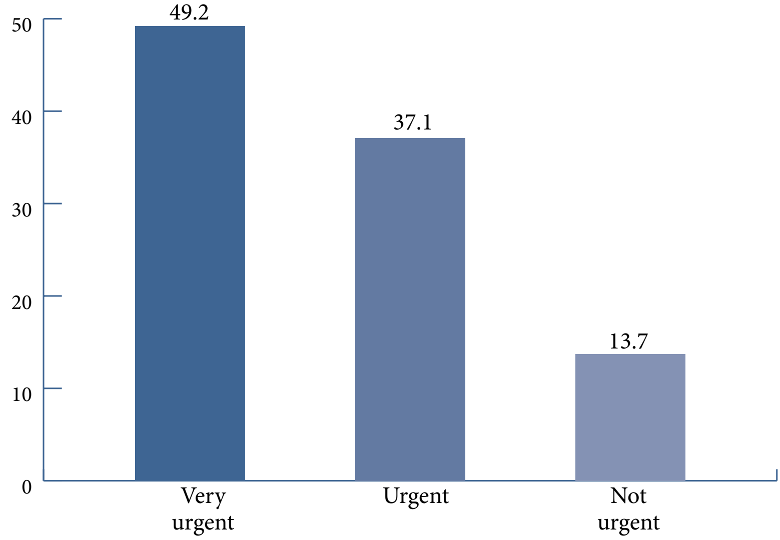
Data shows that while 80% (3,984) of the respondents consider improving skills in fibre knowledge as either urgent or very urgent, 20% (995) do not consider it as urgent. (Fig 114d) Refer Appendix B15.6 for details.

Figure 114(e): Improving in Textile Designing and Technical Skills: Yarn spinning and plying (%) (N=4,979)



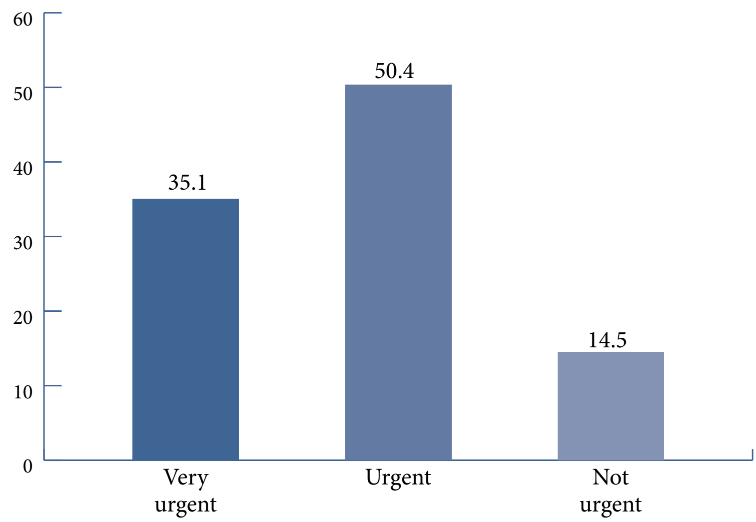
While 80% (3,984) of the respondents consider improving skills in yarn spinning and plying as either urgent or very urgent, 20% (995) do not consider it as urgent. (Fig 114e) Refer Appendix B15.6 for details.

Figure 114(f): Improving in Textile Designing and Technical Skills: Natural Dyeing Techniques (%) (N=5,124)



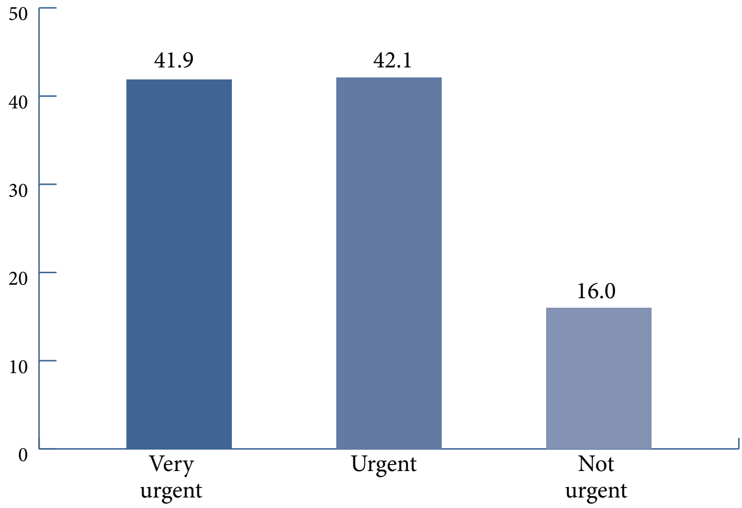
Data shows that while 86.3% (4,424) of the respondents consider improving skills in natural dyeing techniques as either urgent or very urgent, 13.7% (1,537) do not consider it as urgent. (Fig 114f) Refer Appendix B15.6 for details.

Figure 114(g): Improving in Textile Designing and Technical Skills: Upgrading existing weaving and textile production skills on back-strap loom (%) (N=5,129)



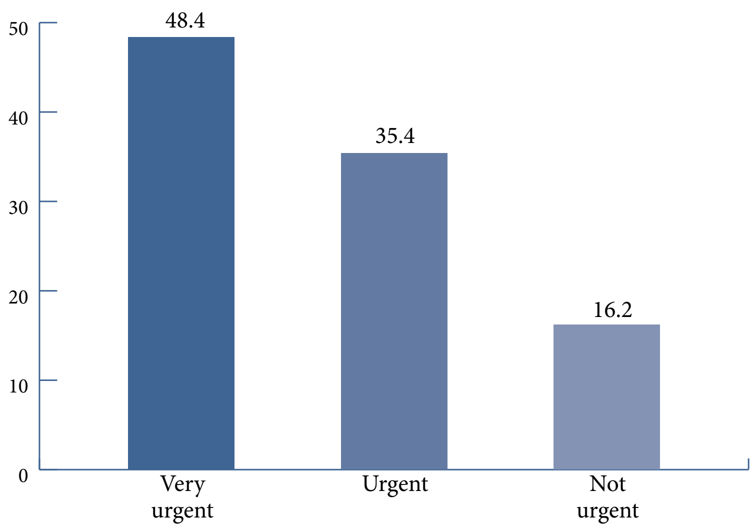
85.6% (4,387) of the respondents consider upgrading weaving and textile production skills on the back-strap loom as either urgent or very urgent. 14.5% (742) do not consider it as urgent. (Fig 114g) Refer Appendix B15.6 for details.

Figure 114(h): Improving in Textile Designing and Technical Skills: New weaving techniques & production skills on Mache loom (%) (N=5,065)



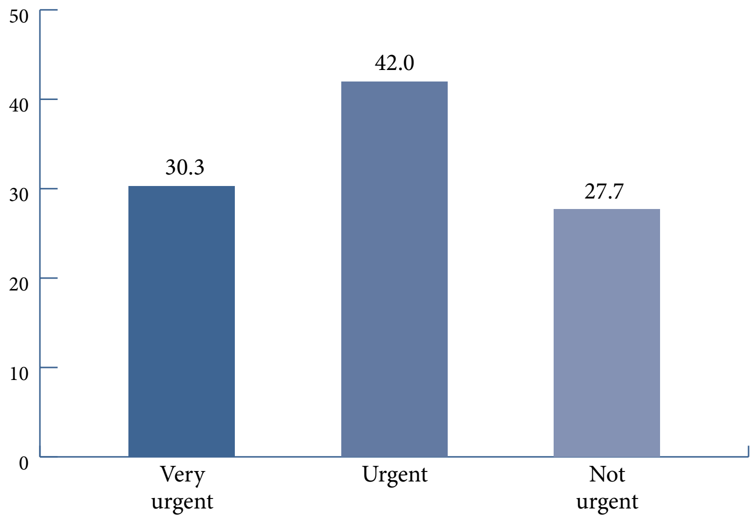
Data shows that while 84% (4,256) of the respondents consider improving new weaving techniques and production skills on the Meche loom as either urgent or very urgent, 16% (809) do not consider it as urgent. (Fig 114h) Refer Appendix B15.6 for details.

Figure 114(i): Improving in Textile Designing and Technical Skills: Textile finishing techniques (%) (N=5,108)



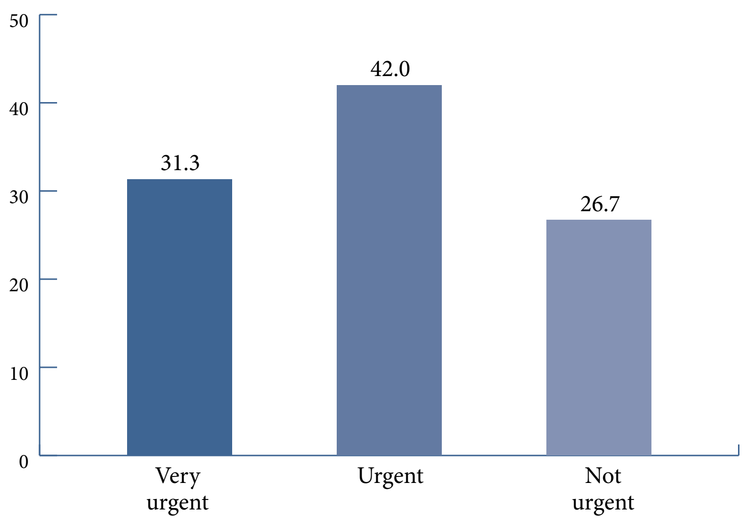
Data shows that while 83.8% (4,279) of the respondents consider improving skills in textile finishing techniques as either urgent or very urgent, 16.2% (829) do not consider it as urgent. (Fig 114i) Refer Appendix B15.6 for details.

Figure 115(a): Improving in Business skills: Financial (%) (N=4,924)



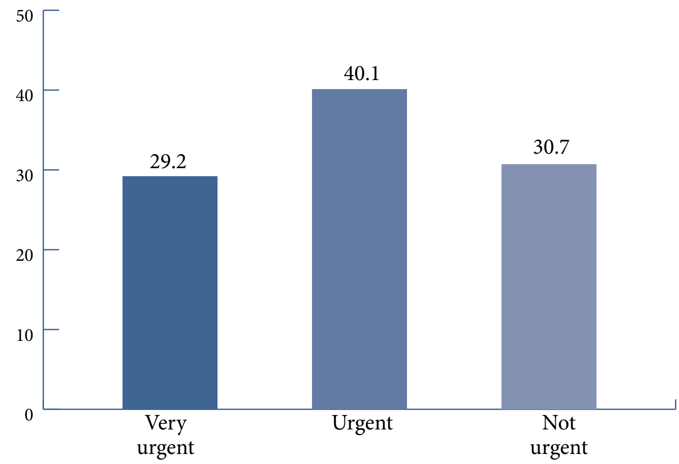
Data shows that while 72.3% (3,561) of the respondents consider improving skills in basic finance, accounting and budgeting as either urgent or very urgent, 27.7% (1,363) do not consider it as urgent. (Fig 115a) Refer Appendix B15.6 for details.

Figure 115(b): Improving in Business skills: Inventory, sales and marketing, including digital marketing (%) (N=4,953)



Data shows that while 73.3% (3,630) of the respondents consider improving skills in inventory, sales and marketing, including digital marketing, as either urgent or very urgent, 26.7% (1,323) do not consider it as urgent. (Fig 115b) Refer Appendix B15.6 for details.

Figure 115(c): Improving in Business skills: Production planning and Time management (%) (N=4,925)

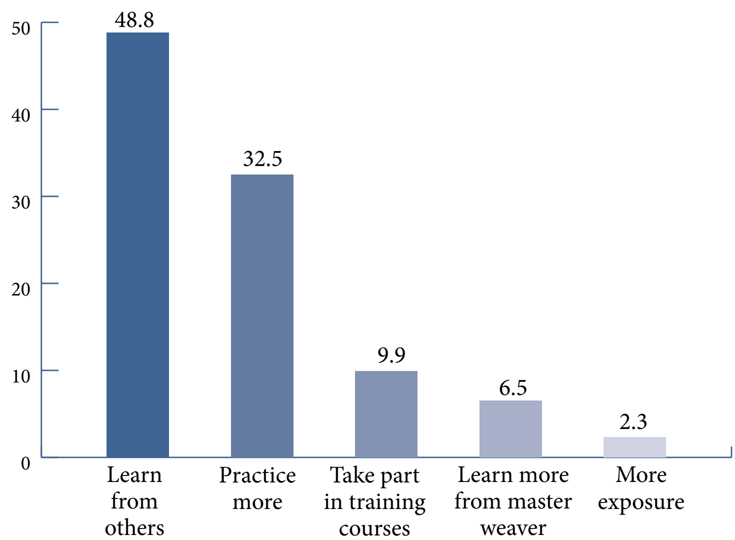


Data shows that while 69.3% (3,412) of the respondents consider improving skills in production planning and time management as either urgent or very urgent, 30.7% (1,513) do not consider it as urgent. (Fig 115c) Refer Appendix B15.6 for details.

iii) Mode of improving weaving skills

Q. How would you like to improve on your weaving skills? Please tick (√) all that applies. *[Learn from others/ Practice more/ take part in training courses/ Learn more from master weaver/ More exposure/ Other]*

Figure 116: Mode of improving weaving skills (%) (N=6,077)

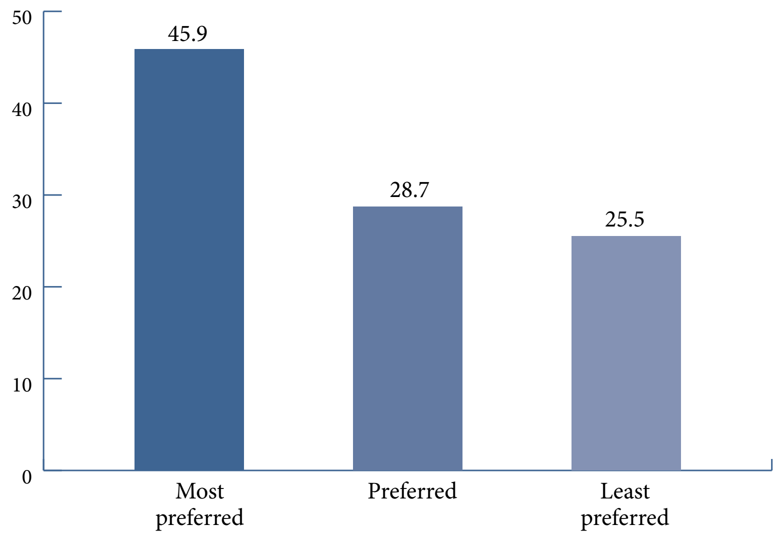


In terms of ways to improve their weaving skills, it ranges in descending order of responses as indicated by respondents from 'learn from others' 48.8% (2,965), followed by 'practice more' (32,5% or 1,977). Others in smaller proportions said 'take part in training courses' (9.9% or 603), 'learn more from master weaver' (6.5% or 395), and 'more exposure' (2.3% or 137). (Fig 116) Refer Appendix B15.7 for details.

iv) Preferences for training

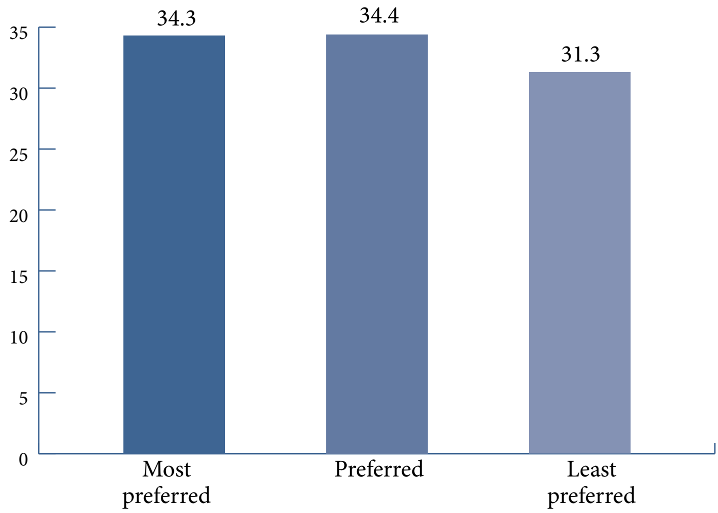
Q. What are your preferences for the trainings? (Please rank all in terms of preferences: 1 for most preferred; 3 for least preferred). Please tick (√) ONE only. *[Frequent short-term training within a week at your locality/ Frequent short-term training within a week at regional/centralized at RTA/ Frequent mid-term duration training of maximum of 1 month at your locality/ Frequent mid-term duration training of maximum 1 month at a regional/centralized at RTA/ Long-term training up to 1 – 3 months at regional/ centralized at RTA/ 6 months – 1 year at a centralized at RTA]*

Figure 117(a): Training preference: Frequent short-term within a week at their locality (%) (N=4,929)



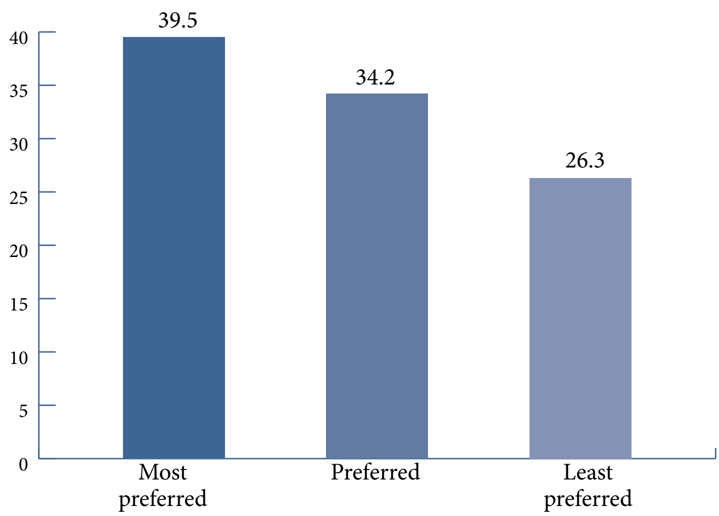
Data shows that while 74.6% (3,674) of the respondents prefer frequent short-term training within a week at their localities, 25.5% (1,255) have shown low preference. (Fig 117a) Refer Appendix B15.8 for details.

Figure 117(b): Training preference: Frequent short-term within a week at regional/ centralized at RTA (%) (N=4,887)



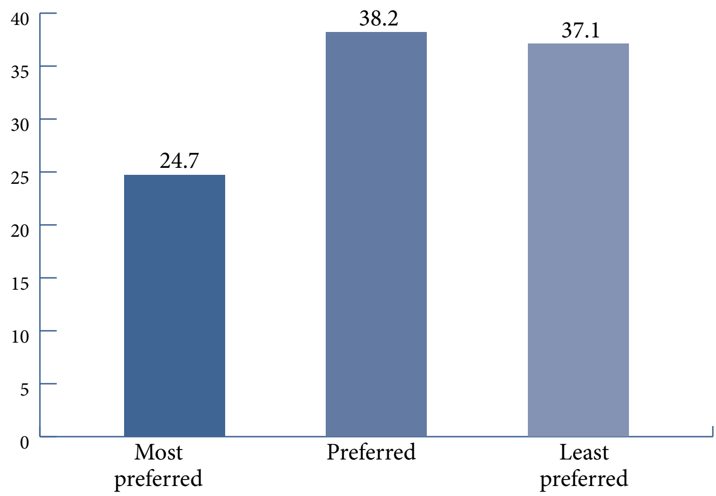
Data shows that while 68.7% (3,358) of the respondents prefer frequent short-term training within a week at regional or centralized at RTA, 31.3% (1,529) have shown low preference. (Fig 117b) Refer Appendix B15.8 for details.

Figure 117(c): Training preference: Frequent mid-term max. of 1 month at their locality (%) (N=4,878)



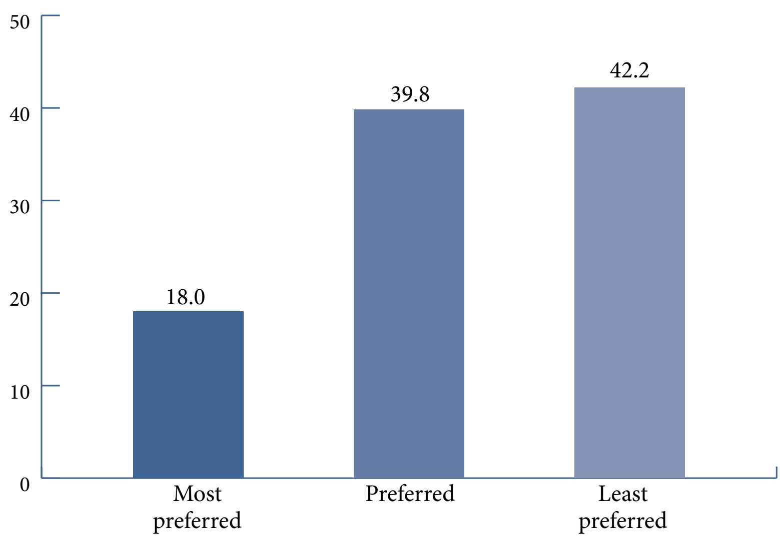
Data shows that while 73.7% (3,593) of the respondents prefer frequent mid-term duration training of a maximum of 1 month at their localities, 26.3% (1,285) have shown low preference. (Fig 117c) Refer Appendix B15.8 for details.

Figure 117(d): Training preference: Frequent mid-term max. of 1 month at regional/centralized at RTA (%) (N=4,869)



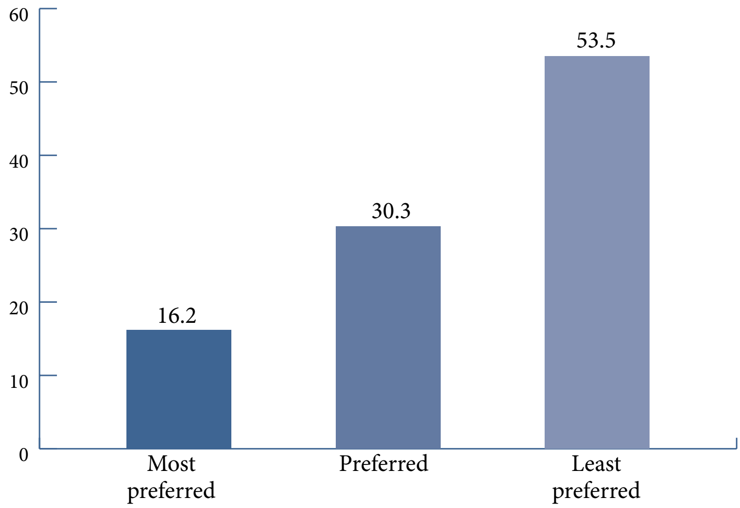
Data shows that while 72.9% (3,064) of the respondents prefer frequent mid-term duration training of a maximum of 1 month at a regional or centralized at RTA, 37.1% (1,805) have shown low preference. (Fig 117d) Refer Appendix B15.8 for details.

Figure 117(e): Training preference: 1-3 months duration at regional/centralized at RTA (%) (N=4,838)



Data shows that while 57.8% (2,795) of the respondents prefer long-term duration training up to 1 – 3 months at a regional or centralized at the RTA, 42.2% (2,043) have shown low preference. (Fig 117e) Refer Appendix B15.8 for details.

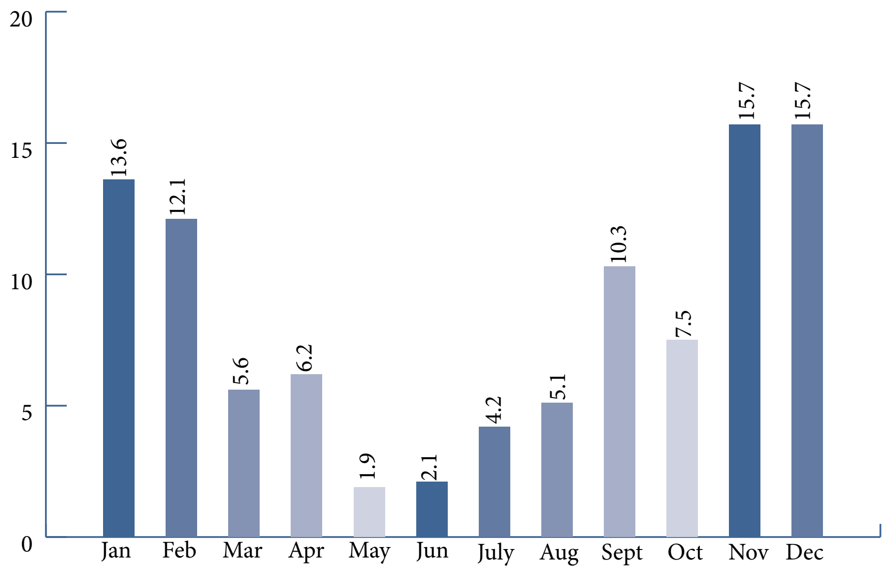
Figure 117(f): Training preference: 6 months - 1 year centralized at RTA (%) (N=4,817)



Data shows that while 46.5% (2,241) of the respondents prefer long-term duration training from 6 months to a year centralized at RTA, 53.5% (2,576) have shown low preference. (Fig 117f) Refer Appendix B15.8 for details.

Q. Within the year, which are your preferred months for training. Please tick (√) all that applies. *[Jan, Feb, Mar … Dec]*

Figure 118: Preferred months for training in the year (%) (N=6,077)



The data shows that 74.9% (4,555) of the weavers would prefer September to February for the trainings. The proportion of preference, except October (7.5% or 456), it ranges from 10.3% or 625 (September) to 15.7% each in November (956) and December (954). Preference during other months range from 1.9% (115) in May to 6.2% (375) in April. (Fig 118) Refer Appendix B15.8 for details.

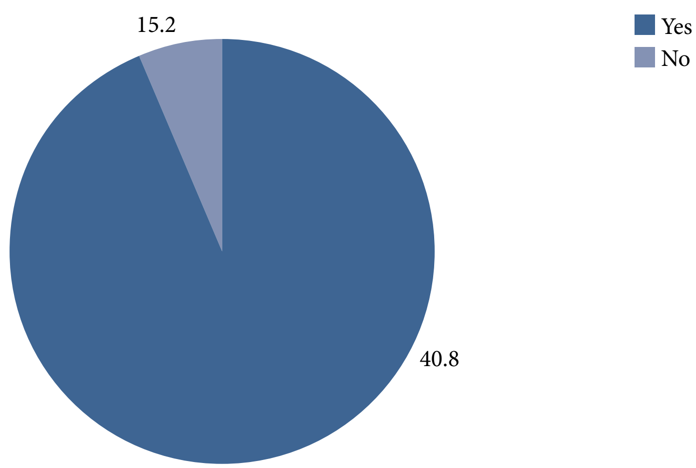
v) Weaving skills certification

Q. Would you like weaving skills to be certified? Why? Please tick (√) all that applies.

If YES –*[It officially validates my skills against a national certified system/ It makes it easier to quote a standard acceptable rate when I am commissioned piece of weaving work/ It gives me recognition amongst my family and community/ It gives me a sense of value/ It is prestigious/ It provides me with an indication of where I am as a weaver in Bhutan/ It indicates to me which particular skills I need to further improve upon/ Facilitates opportunities for employment/ I don't know/ Other]*

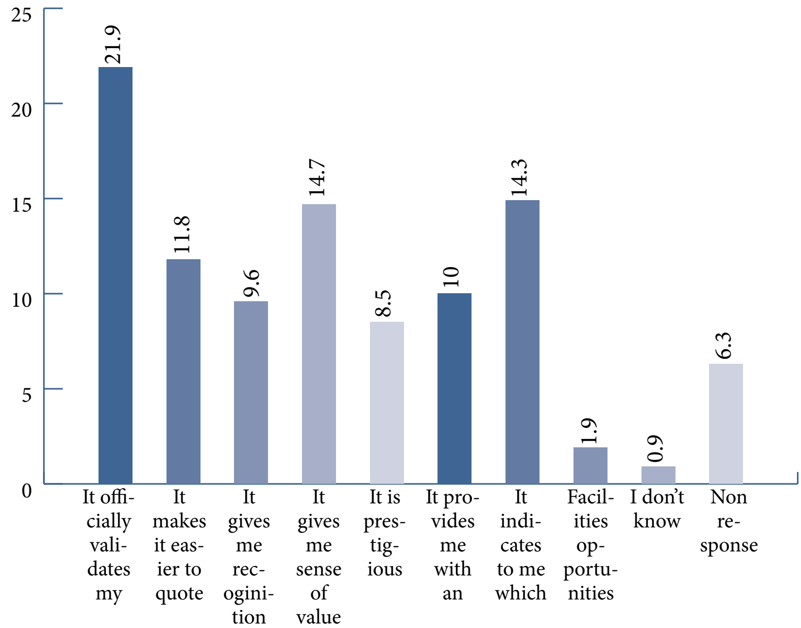
If NO –*[Not interested to have my skills officially validated/ Having my skills certified will work against me when I give a quote when commissioned with a piece of weaving work/ Because people already know the standard of my weaving skills/ I don't need an officially certified system to validate my skills/ It is not prestigious/ I already know where I stand as a weaver in Bhutan/ I don't need a system to indicate where I can further improve my weaving skills/ Does not facilitate opportunities for employment/ I don't know/ Other]*

Figure 119: Whether or Not weavers would like their skills to be certified (%)



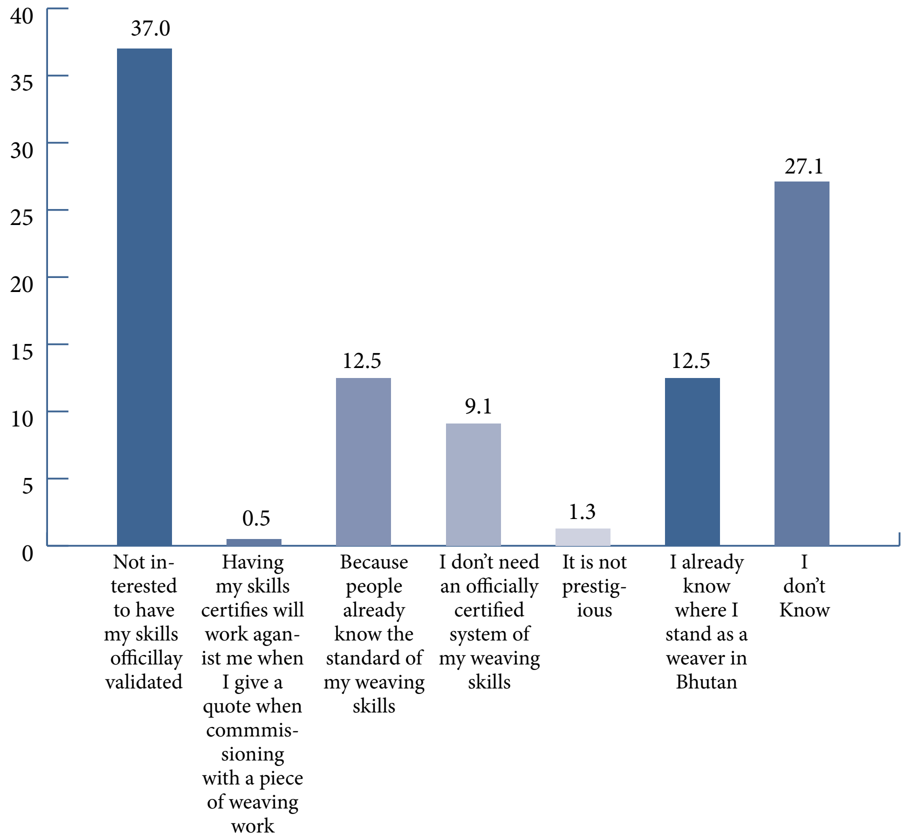
Data shows that about 95% would like their weaving skills to be certified. However, slightly over 5% would not like their weaving skills to be certified. (Fig 119)

Figure 120(a): Preference for certification of weaving skills (%) (N=6,077)



Findings indicate that most weavers would like their weaving skills to be certified for various reasons. These include – over 45% for validation against national standards (21.9%), gauging standing as a weaver (10%), and for further improvement purposes (14.3%); about 35% as a sense of pride and worth, i.e., sense of value (14.7%), recognition (9.6%), and prestige (8.5%); and for economic and employment opportunities (<15%). (Fig 120a) Refer Appendix B15.10 for details.

Figure 120(b): Respondents who would not like their weaving skills to be certified (%) (N=384)



On the other hand, a small group of respondents (384) would not like their weaving skills to be certified. The reasons fall mainly in two categories. Of the 384 respondents, while slightly over 35% are simply not interested in their skills being officially validated, another about 35% either know their own standards or that the people know the standards of their weaving, and therefore, do not need to officially validate their skills. (Fig 120b) Refer Appendix B15.11 for details.

vi) Training cost

Q. Do you think it is reasonable to charge a fee for any of the above trainings that you are interested in? Please tick (√) ONE only. *[Yes/ No]*

If YES, are you willing to contribute to the cost for the above trainings? Please tick (√) ONE only. *[Yes/ No]*

Figure 121: Reasonableness for charging fee for any kind of listed trainings (%) (N=6,077)

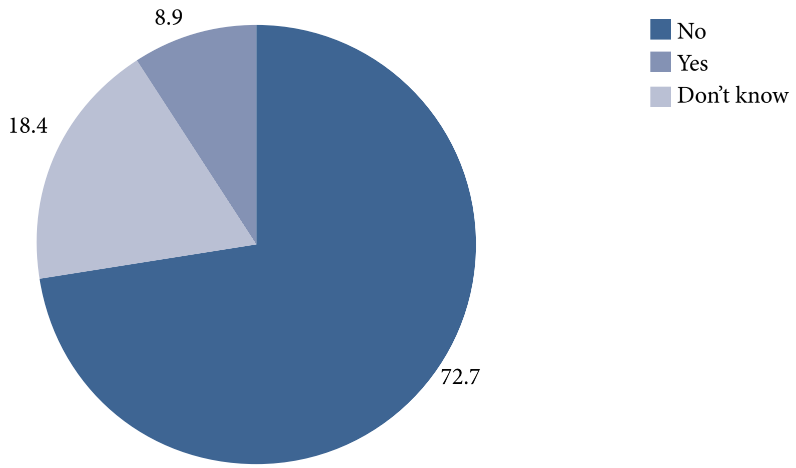
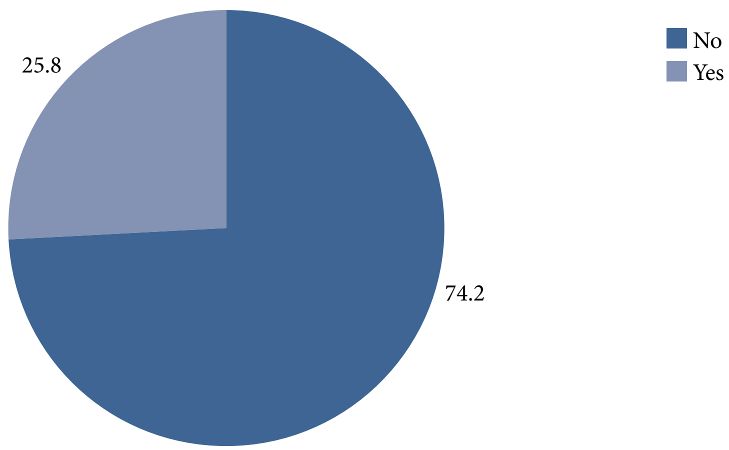


Figure 122: Willingness to contribute to the cost for the listed trainings, if fees are charged (%) (N=1,907)



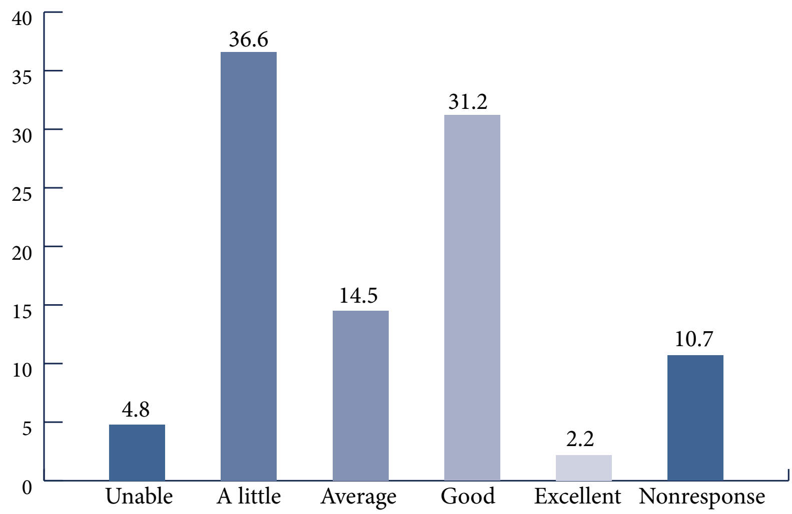
As to whether or not it is reasonable to charge a fee for any of the listed training that the respondents are interested in, only 8.9% or 541 of the total respondents have stated as being 'reasonable'. Of the 1,907 respondents, only 25.8% or 492 of the respondents have indicated their willingness to contribute to the cost of listed training. (Fig 121& 122, Appendices B15.12& B15.13)

vii) Language proficiency

Q. Proficiency in Dzongkha – Speak, Write and Read. Please tick (√) ONE only. *[Unable/ A little/ Average/ Good/ Excellent]*

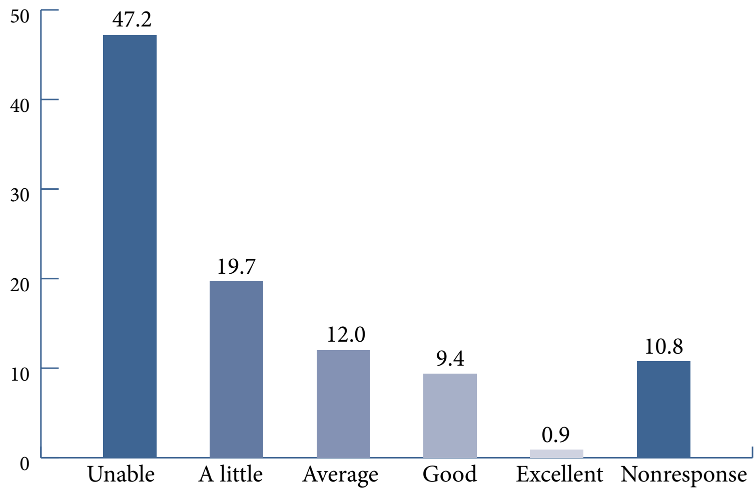
Q. Proficiency in English – Speak, Write and Read. Please tick (√) ONE only. *[Unable/ A little/ Average/ Good/ Excellent]*

Figure 123(a): Language proficeincy: Dzongkha - Speak (%) (N=6,077)



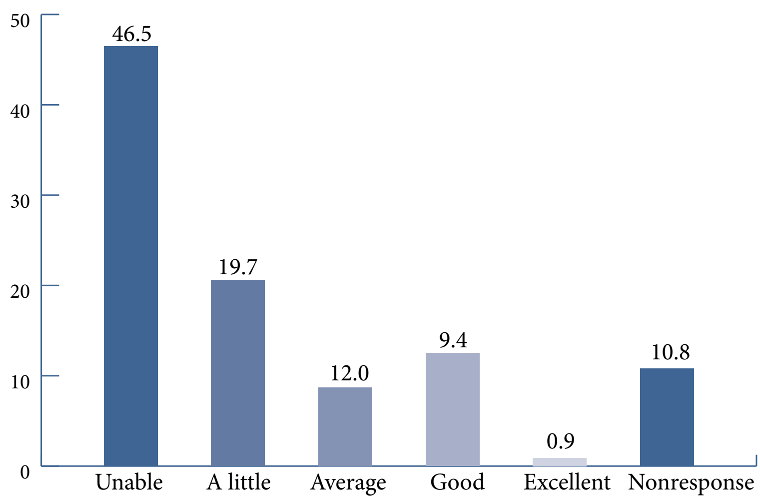
Data shows that while 33.4% (2,032) of the respondents have good proficiency over spoken Dzongkha, 51.1% (3,107) have average or low proficiency. 4.8% (289) have no proficiency in spoken Dzongkha. (Fig 123a) Refer Appendix B15.14 for details.

Figure 123(b): Language proficeincy: Dzongkha- Write (%) (N=6,077)



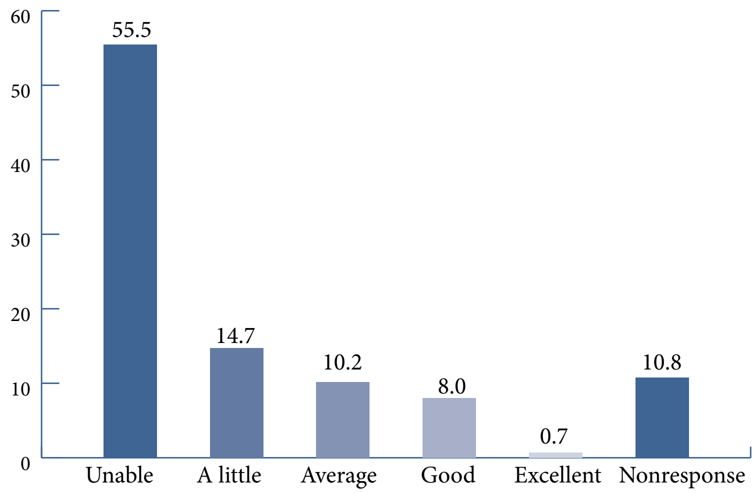
Data shows that while 10.3% (627) of the respondents have good proficiency in written Dzongkha, 31.7% (1,924) have average or low proficiency in writing. 47.2% (2,871) have no proficiency in written Dzongkha. (Fig 123b) Refer Appendix B15.14 for details.

Figure 123(c): Language proficeincy: Dzongkha - Read (%) (N=6,077)



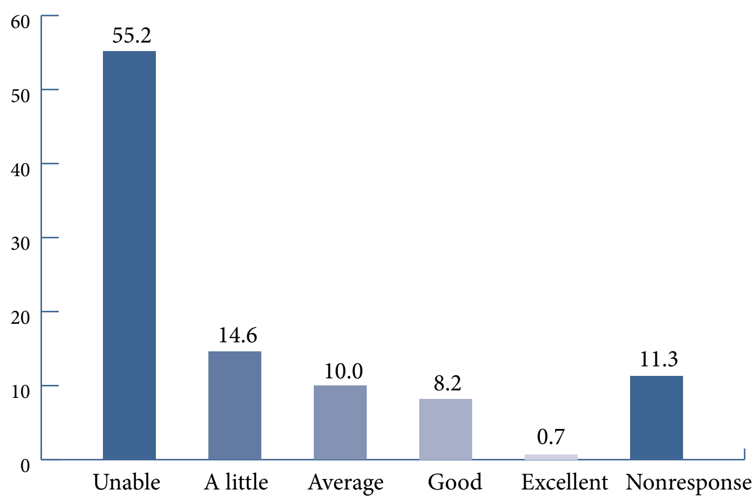
Data shows that while 13.4% (817) of the respondents have good proficiency in reading in Dzongkha, 29.3% (1,780) have average or low proficiency in reading Dzongkha. 46.5% (2,823) have no proficiency in reading in Dzongkha. (Fig 123c) Refer Appendix B15.14 for details.

Figure 124(a): Language Proficiency: English - Speak (%) (N=6,077)



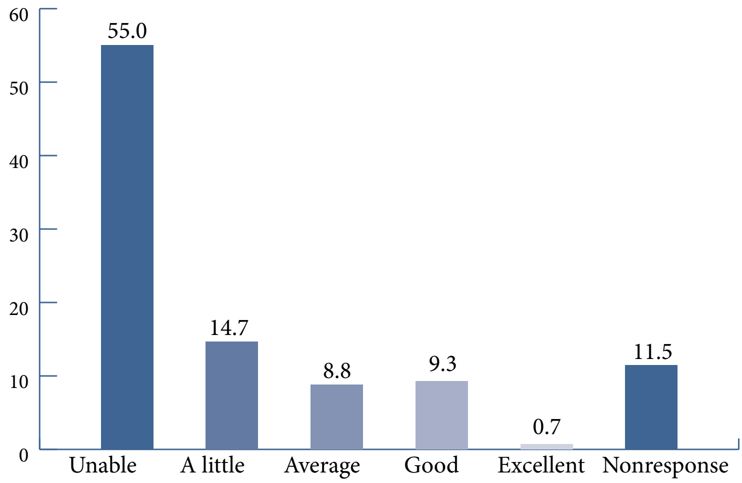
Data shows that 8.7% (529) of the respondents have good proficiency in spoken English, and 24.9% (1,516) have average or low proficiency in spoken English. 55.5% (3,375) have no proficiency. (Fig 124a) Refer Appendix B15.14 for details.

Figure 124(b): Language proficeincy: English - Write (%) (N=6,077)



Data shows that 8.9% (539) of the respondents have good proficiency in written English, and 24.6% (1,499) have average or low proficiency in written English. 55.2% (3,352) have no proficiency. (Fig 124b) Refer Appendix B15.14 for details.

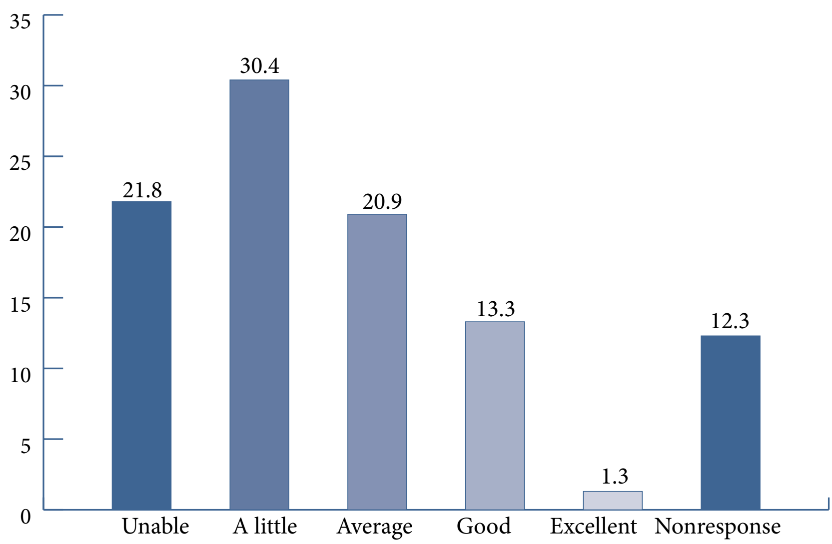
Figure 124(c): Language proficeincy: English - Read (%) (N=6,077)



Data shows that 10% (610) of the respondents have good proficiency in reading in English, and 23.5% (1,427) have average or low proficiency in reading in English. 55% (3,343) have no proficiency.. (Fig 124c) Refer Appendix B15.14 for details.

Q. Proficiency in Numeracy skills. Please tick (√) ONE only. *[Unable/ A little/ Average/ Good/ Excellent]*

Figure 125: Numeracy skills (%) (N=6,077)



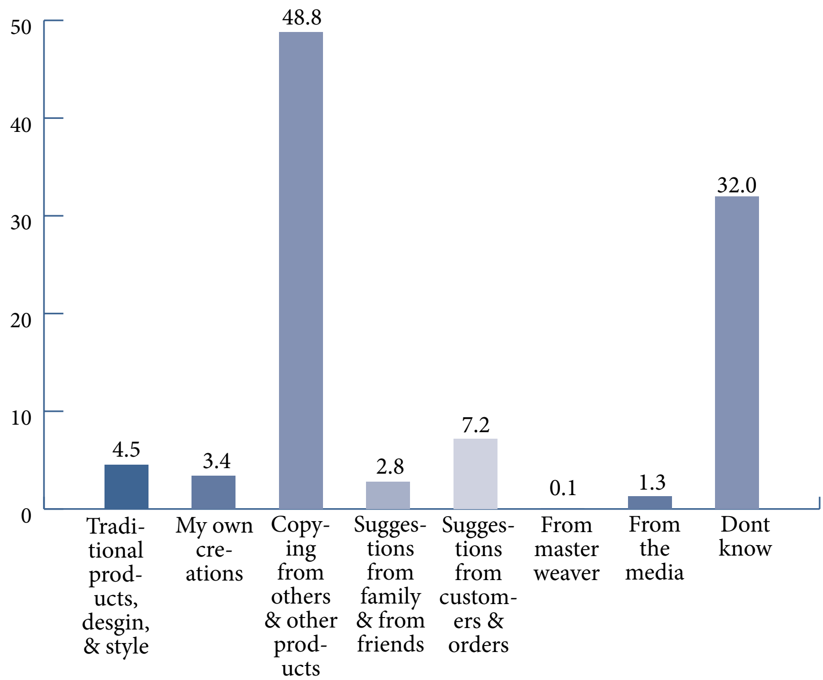
As to their numeracy skills, 51.3% or 3,116 of the respondents have indicated that they either have 'a little' or 'average' proficiency in numeracy. Similarly, 14.6% or 887 respondents have indicated that their proficiency in numeracy is either 'good' or 'excellent'. However, 21.8% or 1,324 of the respondents have no numeracy skills. (Fig 125, Appendix B15.15)

3.7 Design and Technology

i) Sources of ideas for textile products

Q. Most of the time, where did you get the idea to make these products? Please tick (√) ONE only. *[Traditional products, designs and style/ My own creations/ Copying from others and other products/ Suggestions from family and friends/ Suggestions from customers and orders/ From master artisans/ From media (TV, magazines, etc)/ From visits to other places/ Directed from customers and orders/ Other]*

Figure 126: Sources of ideas for the textile products (%) (N=6,077)

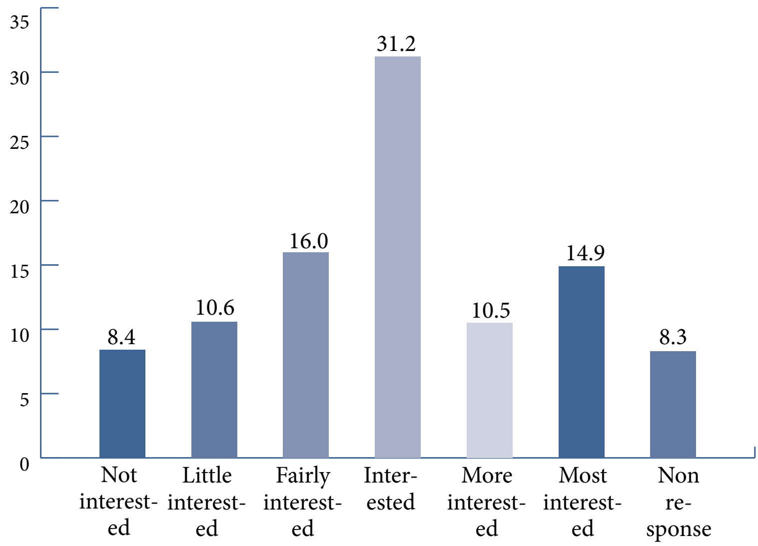


Respondents largely sourced the ideas for their textile products from 'copying from others and other products' as stated by 48.8% or 2,963 of the respondents. Other minor sources reportedly are from 'suggestions from customers and orders' (7.2% or 437), 'traditional products, designs and style' (4.5% or 276) and 'suggestions from family and friends' (2.8% or 172). Their 'own creations' is indicated by only 3.4% or 204 of the respondents. Sources of ideas from the 'master artisans' is almost non-existent (0.1% or 4). (Fig 126, Appendix B16.1)

ii) *Interest in creating textile designs*

Q. What is the level of your interest in creating your own textile designs? (0 – No interest, 5 – Extremely interested) Please tick (√) ONE only.

Figure 127: Level of interest in creating their own textile designs (%) (N=6,077)

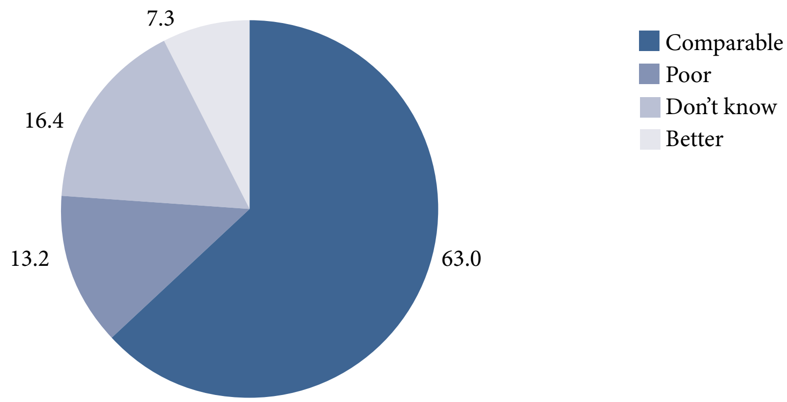


The overall level of interest in creating their own textile designs is high. While 47.2% or 2,871 of 5,570 of the respondents are either 'interested' (31.2% or 1,898) or 'fairly interested' (16% or 973), 25.4% or 1,545 of the respondents are either 'most interested' (14.9% or 904) or 'more interested' (10.5% or 641). The overall interest from 'fairly interested' to 'most interested' is 72.7% or 4,416 respondents. (Fig 127, Appendix B16.2)

iii) Quality of textile products – self-declaration

Q. What do you think of the quality of your textiles comparing with those in the market? Please tick (√) ONE only. *[Better/ Comparable/ Poor]*

Figure 128: Opinions on the quality of their textiles compared to those in the market (%) (N=6,077)



As to the self-declared quality of the textiles, 63% or 3,831 of the respondents claim that their products are comparable to those in the market. While 7.3% or 446 of the respondents claim that they are even better than those in the market, 13.2% or 805 of the respondents indicated that they are 'poor' in quality as compared to those in the market. (Fig 128, Appendix B16.3)

3.8 Social Capital and Happiness

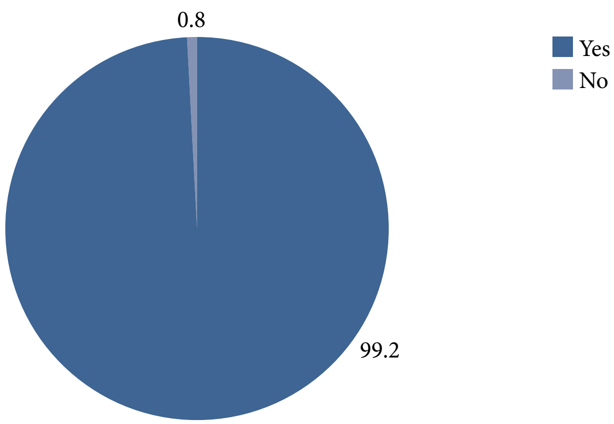
i) Continuing the tradition, culture

Q. Do you like weaving/working on your textiles/textile products? Why? Please tick (√) all that applies.

If YES – *[To continue family tradition/ Proud of my culture/ People interested in the products/ High prestige/ Help others/ Enhance income and improve living conditions/ Have a good market demand/ Easy access to raw materials/ Interested in making/ Self-fulfilment/ I don't know/ Other]*

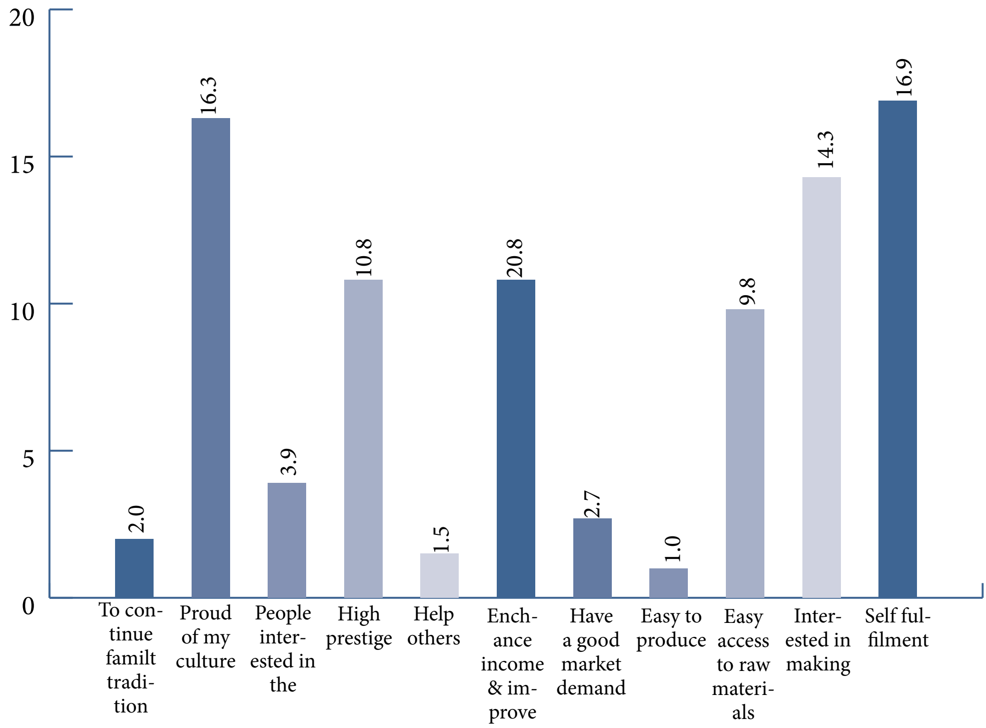
If NO – *[Not interested to continue traditions/ Not proud of my culture/ People now not interested in these products/ Low prestige/ Too much trouble/ Unable to generate income or improve living conditions/ No market demand/ Too complex and complicated to produce/ Unable to obtain raw materials/ No interesting/ Not self-fulfilling/ Other]*

Figure 129: Whether or Not weavers like weaving/working on their textile products (%)



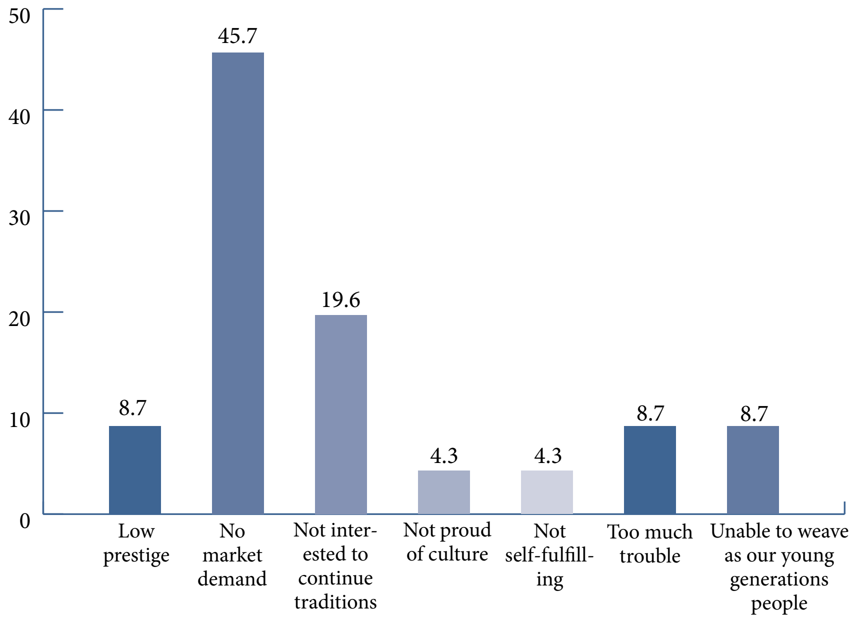
Nearly 100% of the respondents like weaving or working on their textile products. (Fig 129)

Figure 130(a): Reasons for liking to weave/work on their textiles/textile products (%) (N=6,077)



Data shows that 68.3% (4,147) of the respondents like weaving/work on their textiles/textile products to enhance income generation and improving living conditions (20.8% or 1,263), self-fulfilment (16.9% or 1,026), pride in culture (16.3% or 989), and interest in making (14.3% or 869). This is followed by 20.6% with high prestige (10.8% or 659) and easy access to raw materials (9.8% or 596). Other reasons at 11.1% (675) from 1% to 3.9% include people's interest in the products, good market demand, continuing family tradition, helping others, and ease of production. (Fig 130a) Refer Appendix B17.1 for details.

Figure 130(b): Reasons for not liking to weave/work on their textiles/textile products (%) (N=46)

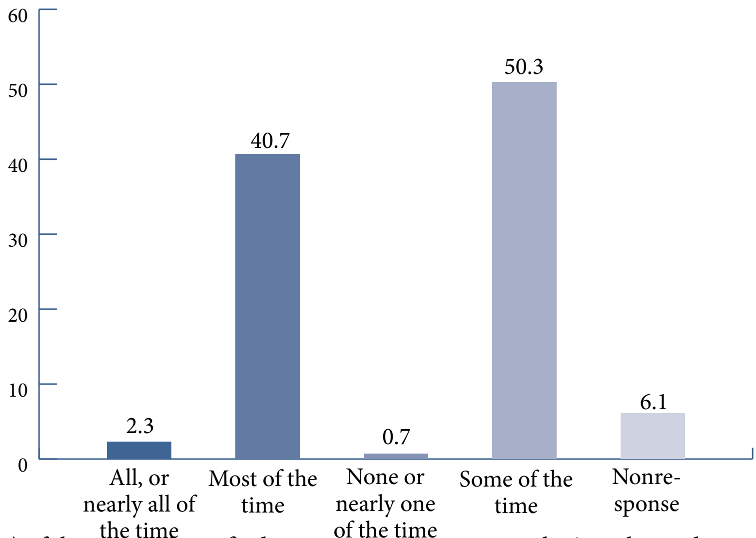


On the other hand, data shows that 46 respondents do not like to weave/work on their textiles/textile products. The major reason cited is having no market demand (45.7% or 21), followed by no interest in continuing the tradition (19.6% or 9). Other reasons cited include low prestige, too much trouble and unable to generate income to improve living conditions (26.1% or 12), followed by indicating that they are not proud of the culture and that weaving work is not self-fulfilling (8.6% or 4). (Fig 130b, Appendix B17.2)

ii) Enjoying the weaving profession – Being Happy

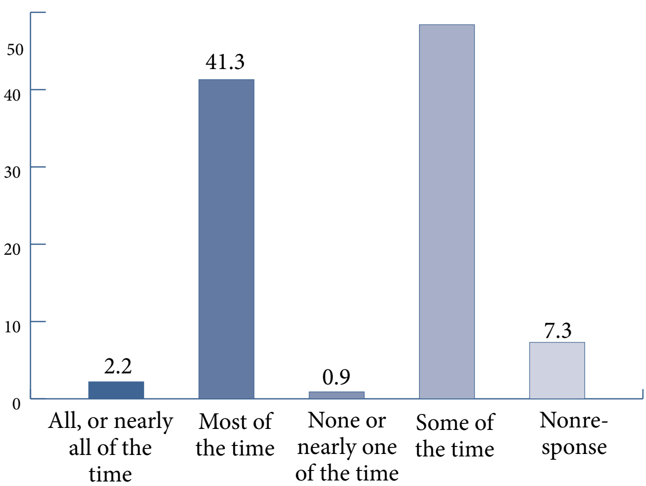
Q. How much of the time do you find weaving/working on your textiles/textile products interesting/ rewarding/ difficult/ enjoyable? Please tick (√). *[None or nearly one of the times/ Some of the time/ Most of the time/ All, or nearly all of the time]*

Figure 131(a): Times respondents find weaving/working on your textiles/textile products Interesting (%) (N=6,077)



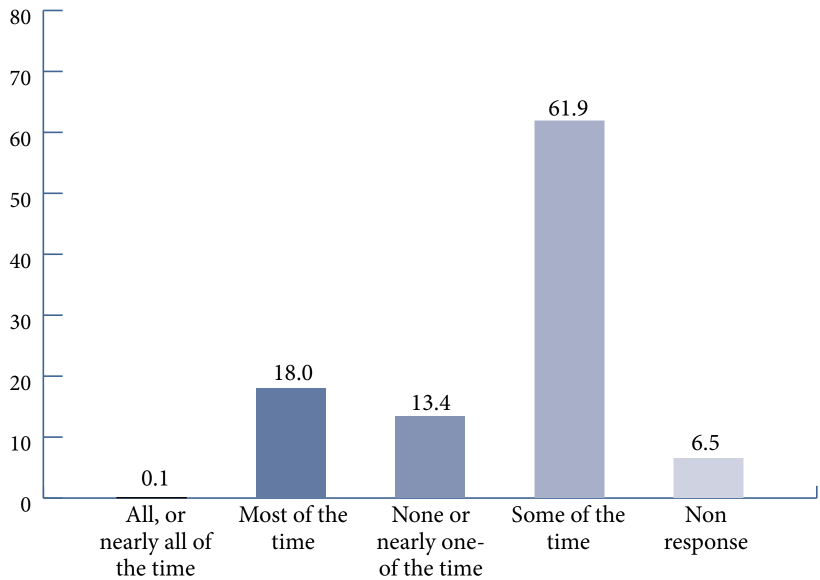
While 43% (2,610) of the respondents find weaving/working on textiles/textile products interesting all or most of the time, 50.3% (3,055) find some of the times interesting. 0.7% (43) of the respondents did not find weaving interesting. (Fig 131a) Refer Appendix B17.3 for details.

Figure 131(b): Times respondents find weaving/working on your textiles/textile products Rewarding (%) (N=6,077)



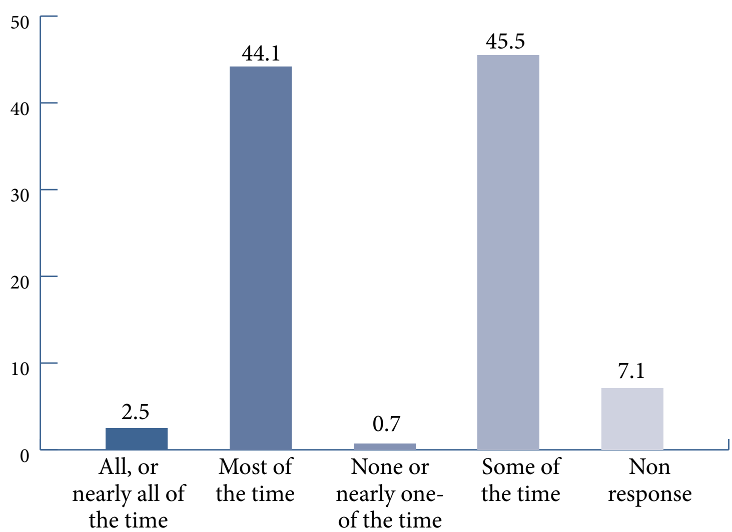
Data shows that while 43.5% (2,641) of the respondents find weaving/working on textiles/textile products rewarding all or most of the time, 48.4% (2,940) find some of the times rewarding. 0.9% (52) of the respondents did not find weaving rewarding. (Fig 131b) Refer Appendix B17.3 for details.

Figure 131(c): Times respondents find weaving/working on your textiles/textile products Difficult (%) (N=6,077)



Data shows that while 18.1% (1,103) of the respondents find weaving/working on textiles/textile products difficult all or most of the time, 61.9% (3,763) find weaving some of the times difficult. However, 13.4% (816) of the respondents did not find weaving difficult. (Fig 131c) Refer Appendix B17.3 for details.

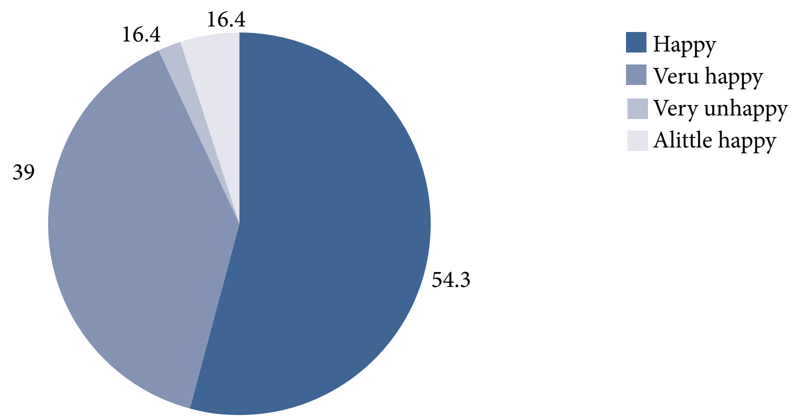
Figure 131(d): Times respondents find weaving/working on your textiles/textile products Enjoyable (%) (N=6,077)



While 46.7% (2,839) of the respondents find weaving/working on textiles/textile products enjoyable all or most of the time, 45.5% (2,763) find weaving enjoyable some of the time. 0.7% (41) of the respondents did not find weaving enjoyable. (Fig 131d) Refer Appendix B17.3 for details.

Q. As a weaver, would you say you are? Please tick (√) ONE only. *[Very happy/ Happy/ A little happy/ Very unhappy]*

Figure 132: Happiness level of respondent weavers (%) (N=6,077)



On the question of the level of happiness, most of them seem either 'happy' (54.3% or 3,297 of 6,077) or 'very happy' (39.0% or 2,367). 1.9% or 114 of the respondents reported being 'very unhappy', while 4.9% or 299 were 'a little happy'. (Fig 132, Appendix B17.3)

4
ANALYSIS OF THE FINDINGS

4.1 General Profile

Age range

Findings indicate that majority of the population of weavers are matured. There is a major fall (slightly over 25%) between weavers in the age group '26 – 35 years' (>35%) and those 'less than 25 years' (>10%). This is alarming. It is less than half of the workforce of those in the '26 – 35 years' category. The findings are similar to that of the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013). The survey found that relatively few young women were weaving; with the exception of weavers in eastern Bhutan where the young, below 20 years, made up almost 10% of the weavers, young weavers in other regions represented only 3-4% of the weavers (p.11).

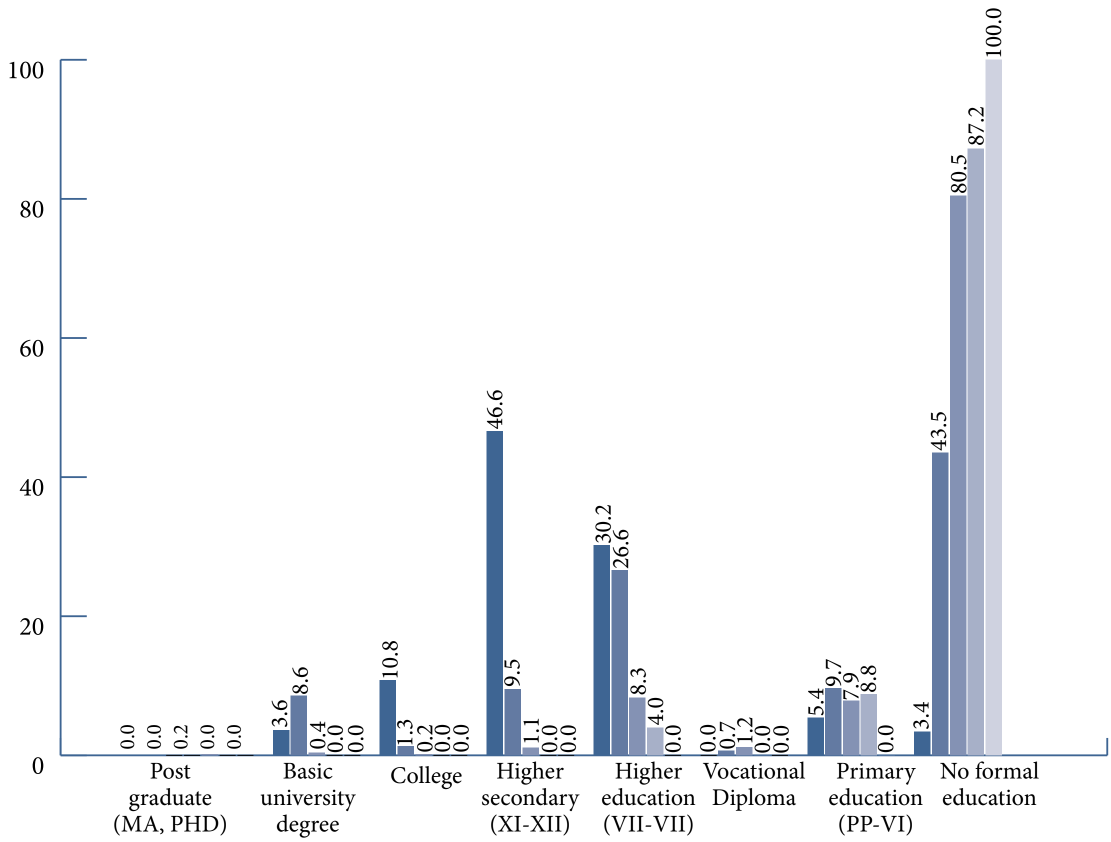
Part of the reason for the observation may have to do with success in the education system. In 2020, as per *Annual Education Statistics* (MoE, 2020), the gross enrolment rate (GER) for girls in secondary school education was 97.6%, with the net enrolment rate (NER) being 80.2% (ages 12-18 years) (p.4). Further, it must be noted that an average of 58.1% of the students in secondary school education were overaged during the same period (p.21). Similarly, GER for female students in tertiary education was 23.5% (out of the total of 23.6%), with a gender parity index (GPI) of 0.94. The normal age composition is 19-23 years (p.4 & 30).

Furthermore, outside of the education and training settings and as per Bhutan Labour Force Survey 2020 (NSB, 2020), whereas 78.3% (74.9% female) of the youth (15-24 years) were employed (p.20), 22.6% (25.4% female) of youth were unemployed in 2020 (p.35).

Educational background and age group

In terms of educational levels of respondents in 'less than 25 years' age group, 76.8% (526) of the respondents had higher secondary (46.6% or 319) and secondary education (30.2% or 207) levels. Remaining respondents in the same age group included with 'college' (10.8% or 74), 'primary' (5.4% or 37), and 'basic university' (3.6% or 25) education levels. Only 3.4% (23) of the respondents were without any formal education. There were no participants with postgraduate education or with a vocational diploma within this age group among the respondents. The highest proportion of respondents with 'no formal education' was among '36-45 years' age group (25.5% or 1,488), followed by '26-35 years' (15.4% or 938), '46-55 years' (15% or 909), '56 and above' (5.7% or 346), and least being 'less than 25 years' (0.4% or 23). (Fig 133) Refer Appendix B1.11 for details. On the other hand, while the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2020) found that about half the weavers were without any formal education, the educational data was not broken down by age (p.13).

Figure 133: Educational background of respondents by age (%)



Number of persons in the household

The findings indicated that about 85% of the respondents had 'less than five persons' in the household. This finding corroborates with the *Population and Housing Census of Bhutan 2017* (PHCB2017) (NSB, 2018). It reported that while the average household size had reduced to 3.9 persons in 2017 from 4.6 in 2005 (p.72), the number of households had substantially increased (by 29.2% from 2005) during the same period (p.71), suggesting a decline in the number of traditional joint or extended families (p.18). *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) did not collect any data on household or family size to make any comparison.

Number of children under 18 years in the household

The study found that 98.3% of the respondents have 'less than 5 children' under 18 years in their households. However, no major surveys such as the PHCB2017, BLSS2017, BLFS2020 have incorporated this theme in their surveys to make any comparison. Nonetheless, as seen above, since the family/household sizes are smaller, it may be safe to suggest that these family structural patterns are reflective of the national patterns. In view of this, it may be deduced that doing well in weaving would have correspondingpositive impact on the weaving families' wellbeing.

Interviewee's position in the family

Findings indicate that over 70% of the respondents were 'housewife/husband', based on which it may be deduced that most weaving families may be nuclear families. This corroborates with the findings under 'number of persons in the family' and the findings of the PHCB2017 as discussed above.

Annual family income

Over 60% of the respondents indicated their annual income as constituting 'middle income'. While this study design has not defined what may constitute 'middle income', we may be able to gauge what it may constitute on the basis of the *Bhutan Poverty Analysis Report 2017* (PAR2017) (NSB & WB, 2017) and *A Compass Towards a Just and Harmonious Society – 2015 GNH Survey Report* (CBS&GNH Research, 2016). PAR2017 estimated the poverty line at Nu.2,195.95 per person per month (p.vii), which for a person for the year will translate to Nu.26,351.40. For an average household size of 3.9 persons (NSB, 2018 as mentioned above), this poverty line will translate to Nu.102,770.46. The GNH Survey 2015 found that the average annual total household income was Nu.231,502, with an average annual total household income for urban and rural residents respectively being Nu.394,606 and Nu.156,124 (p.221). Perhaps, taking the national average, the average annual household income expressed as 'middle income' could constitute around Nu.250,000. However, this could vary significantly depending on whether one is an urban or a rural dweller.

Family income activity

Of the total respondents, 14.3% (see Fig 8 above) of interviewees said that weaving was their main family income activity. Of these over 70% are within the age range of 26 – 45 years, followed by 46 – 55 years (<20%) (Fig 134, Appendix B1.12); nearly 70% without any formal education and about 25% with primary or secondary education (Fig 135, Appendix B1.13). The bulk of these 14.3% is from Chukha, Samtse and Paro (>55%) (Fig 136, Appendix B1.14), all in the Western region. This potentially can throw off the popular belief that weaving happens (only) in the Eastern region. However, this is not surprising as respondents from the Western region constituted 55% of the total (see analysis on 'participation by region' below). On the other hand, it is possible that weavers in these areas spend full time weaving, thus making weaving their main family income activity. It is also possible that weavers from other dzongkhags could have moved or taken temporary residence in these dzongkhags for economic opportunities, where they are able to devote their full-time to weaving. Future surveys could try to capture both their permanent and current residence in the data collection, disaggregated by rural-urban locations, which potentially could resolve some of the information gaps.

Figure 134: Weaving as main family income activity age (%) (N=954)

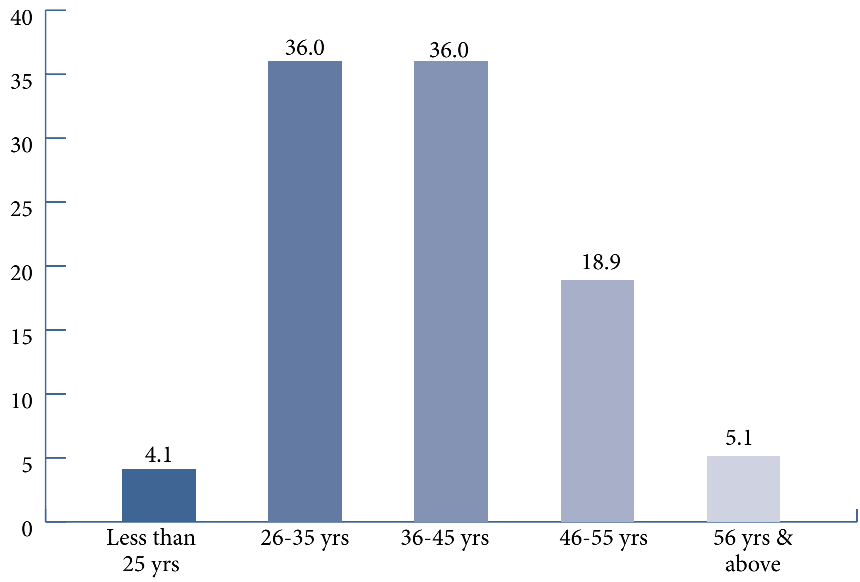


Figure 135: Weaving as main family income activity by education (%) (N=955)

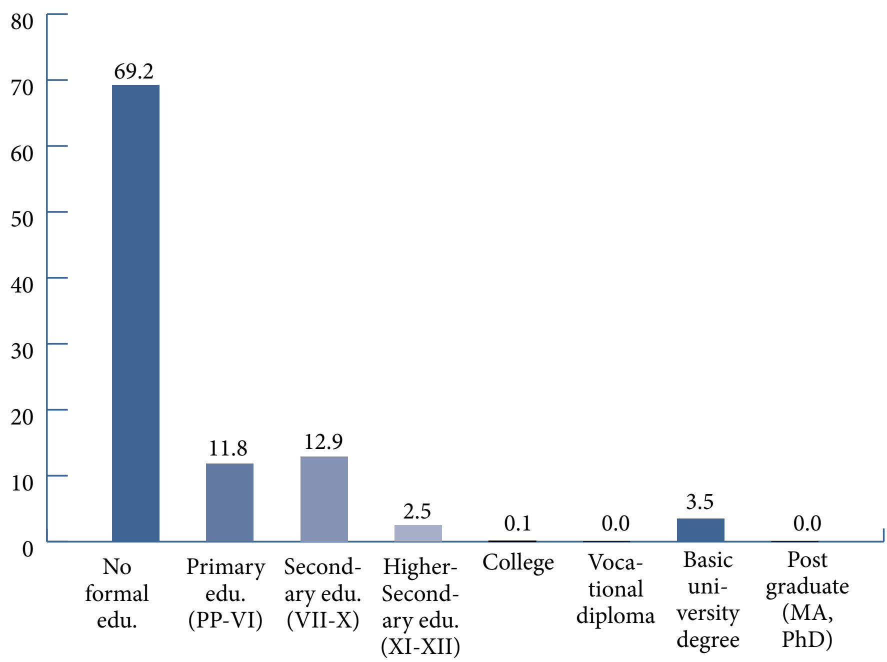


Figure 136: Weaving as main family income activity by Dzongkhag (%) (N=955)

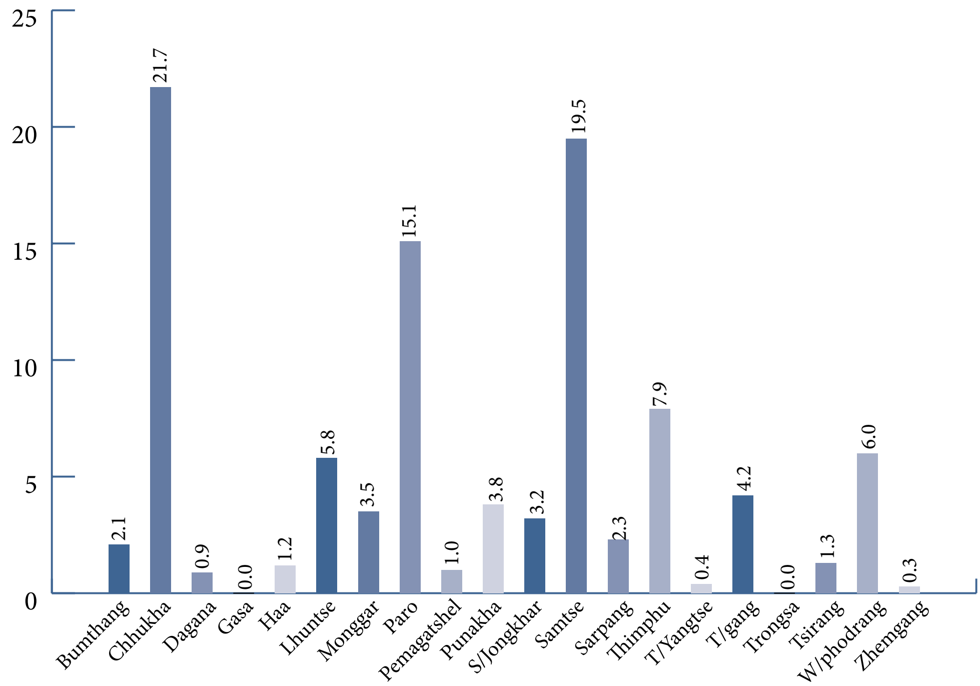
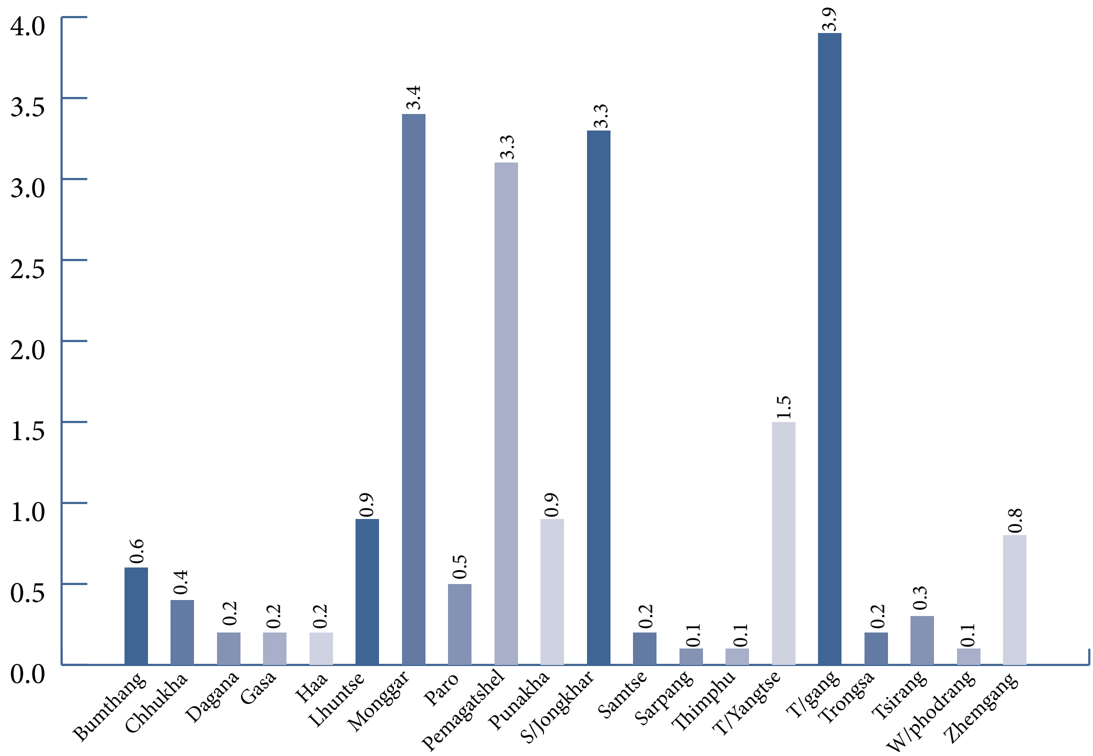


Figure 8 under section 3 indicated that about 55% of those weavers interviewed were reportedly engaged either in 'farming' or 'mixed-farming'. It could be deduced that weaving is mainly a rural economic activity. Perhaps, Fig 137 confirms this. Most of those respondents who indicated 'mixed-farming' as their main income activities are from the Eastern dzongkhags – Trashigang, Monggar, SamdrupJongkhar, Pemagatshel, and Trashi Yangtse.

Figure 137: Mixed-farming as main income activity by Dzongkhag (%) (N=1,267)



Participation by regions:

The survey shows that 55% of the respondents were from the 'Western' region, followed by the 'Eastern' region (27.9%), 'Central' region (9.6%) and 7.5% from 'Thimphu' dzongkhag along with Thimphu Thromde. This finding is in total contradiction to the findings of the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013). Of a total of 64,100 women engaged in weaving activities on a regular basis, 56% (35,900) were found in the eastern region, followed by Thimphu at 25% (16,000). Western and central regions were respectively 10.5% (6,700) and 8.5% (5,400). (p.10 & 12). If there was any consistency in the trend of weavers, this survey should have indicated similar findings, i.e., most of the respondents were from the eastern region, followed by Thimphu, western and central regions. The 2010 survey (MoHCA& NSB, 2013) was designed to cover all regions and Thimphu city (separately), collecting information through household weaver interviews covering approximately 3,000 households selected through circular systematic sampling – a standard international sampling methodology. Using the *2007 Bhutan Living Standard Survey* (which found that 27% of households are engaged in weaving activities), the survey determined that the sample size required to get reliable estimates at the regional level was a minimum of 3,000 households. (p.8) Perhaps for future surveys, such vigorous survey methodology as adopted by the 2010 textile survey may have to be adopted to ensure enhanced credibility of the findings.

4.2 Textile Practice and Production Types

Type of textile production practice

The survey shows that over 95% are engaged in 'weaving', with 'yarn production and processing', 'dyeing' and 'other' representing very little. Of those practising dyeing, most of them are in Pemagatshel, with very few in Trashigang (Fig 138, Appendix B2.13). Similarly, of those practising yarn production and processing, most are in SamdrupJongkhar and Trashigang and a few in Lhuentse (Fig 139, Appendix B2.14).

Figure 138: Dyeing practice by Dzongkhag (%) (N=43)

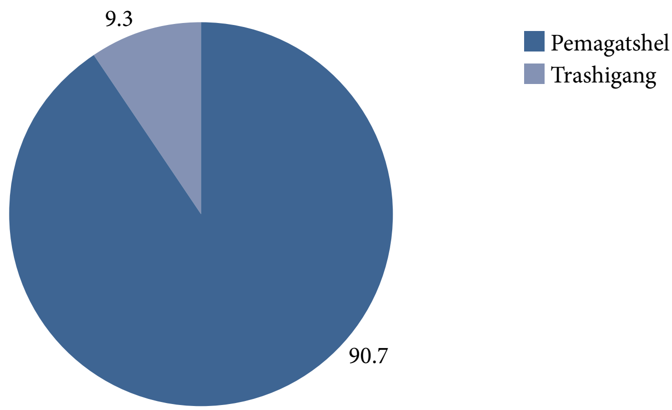
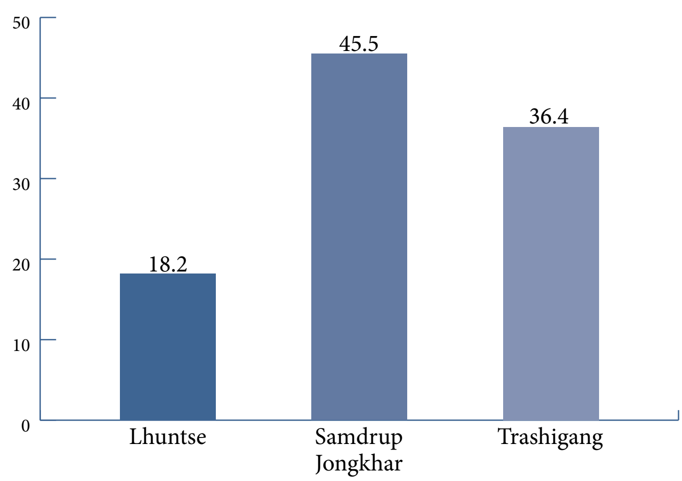


Figure 139: Yarn production and processing by Dzongkhag (%) (N=11)



The finding is very similar to the findings of the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013). It reported that weaving was predominantly practised as a very individual and isolated activity, with production characterised by a high level of fragmentation and almost total lack of organisation, including value-chains and lack of specialisation (p.21). The situation in the weaving sector has not changed much since its last survey in 2010, in spite of its recommendations.

Frequency of Gho and Kira types produced in the last 5 years

The survey shows that slightly over 40% have 'frequently' produced *KarchangGho* in the last 5 years, with over 30% producing it occasionally. Similarly, while over 17% produced *HorGho* occasionally, slightly over 12% produced 'frequently'. On the other hand, only about 5% produced *ShinglochemGho* 'frequently', with slightly over 10% producing it 'occasionally' during the same period. It shows that *KarchangGho* has been produced more frequently, followed far below by *HorGho*, and still farther by *ShinglochemGho*. As to the frequency of *Kira* types produced, the survey shows that about 50% have 'frequently' produced *Karchang Kira* during the past 5 years and another about 35% have 'occasionally' produced the same. Similarly, about 25% have 'frequently' produced *Jamsam Kira* during the past 5 years, with another about 15%producing 'occasionally'. However, only slightly over 2% have 'frequently' produced *Kiras* with intricate patterns (*Dhidhim*) in the past 5 years, with another slightly over 5% producing it 'occasionally'. It shows that *Karchang Kira* is most frequently produced, followed about 50% behind by the production for *Jamsam Kira,* and followed far behind by the production of *Dhidhim Kira.*

There was not a parallel question(s) on these in the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) to draw any comparison. It asked a general question – "What are the products that you have produced in the past 12 months?" and listed "Traditional Products" such as "*Kira, Gho, Rachu,* … Others" and "Non-Traditional Products" such as "Scarves, Shawls … Others". The questions on *Gho* and *Kira* were very generic to make any comparison. (Question 11 of the survey questionnaire)

Frequency of Yathra production

The survey shows that nationally a very small 0.3% have either 'occasionally' (0.1%) or 'frequently' (0.2%) produced *Yathra* during the past 5 years. This may look alarming! Traditionally, it is a known fact that *Yathra* is produced only in Bumthang (MoHCA& NSB, 2013, p.10). Upon analysis, 0.2% came from Bumthang (Central region) and 0.1% was from Paro (western Bhutan), which is a surprise. Between Bumthang and Paro, proportions are respectively about 65% and 35%. *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013, p.16) did not record any*Yathra* being produced in any other region except in the central region (Table 6b). But it is not clear whether it was only Bumthang in the central region that produced *Yathra*. However, it is also possible that some *Yathra* weavers from Bumthang may have moved to Paro, or that some weavers in Paro may have picked up the tradition of weaving *Yathra*in recent years. Either way, it calls for some comprehensive studies, including determining proper methodology aspects to capture true data.

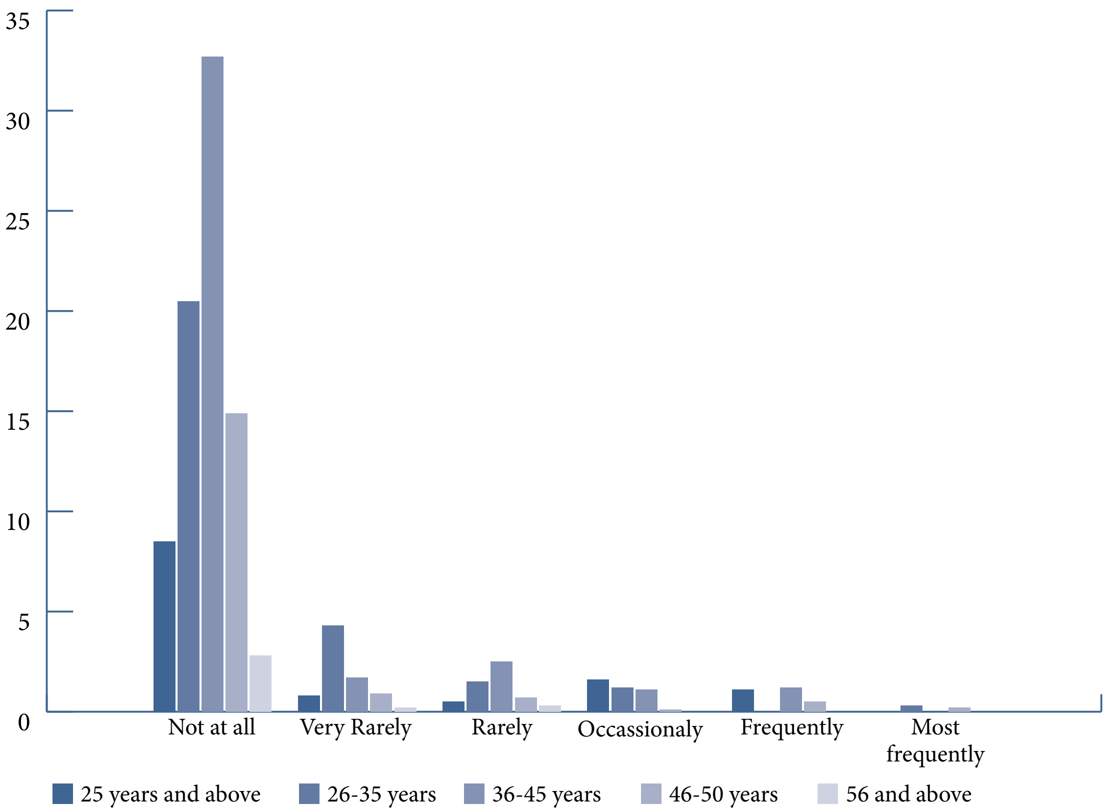
Frequency of 'Other' types of traditional textiles produced

Just over 10% have either 'occasionally' or 'frequently' produced 'Other' types of traditional textiles, i.e., *Rachu, Kera, Kheb,* etc., in the last 5 years. There was not a parallel question(s) on this in the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) to draw any straightforward comparison. However, it asked a general question – "What are the products that you have produced in the past 12 months?" and listed "Traditional Products" such as "*Kira, Gho, Rachu,* … Others" and "Non-Traditional Products" such as "Scarves, Shawls … Others". The question also asked the respondents to mention quantities woven against each textile type. (Question 11 of the survey questionnaire) The survey recorded having produced 37,400 pieces of *Rachu* and 77,700 pieces of *Kera* against 220,700 pieces of *Kira* and 97,500 pieces of *Gho* during a 12-month period. (p.16) Compared to the data from the 2010 survey, the production of *Rachu, Kera, Kheb,* etc. reported in this survey seems low. The responses required for the current survey were in terms of production frequencies – from 'Not at all' to 'Most frequently'.

Frequency of 'Contemporary' textiles/fabrics produced

Just over 5% of the respondents either 'frequently' or 'occasionally' produced contemporary textiles during the past 5 years, which included bags, hand gloves, hats and socks, scarves, rice cooker covers, shawls, table cloths, wallets and purses, etc. with the proportion of production ranging from about 5% (wallet and purse) to over 15% (hand gloves). This seems to corroborate with the findings of the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013), where it found that the production under the non-traditional production items against the production of traditional textile items was insignificant. (p.16)

Figure 140: Contemporary textile by age (%) (N=4,271)



Those producing contemporary textiles occasionally or frequently are mainly – within the age range from less than 25 years to about 45 years (Fig 140, Appendix B2.15); those without any formal education, secondary and higher secondary education (Fig 141, Appendix B2.16); and those weavers in Thimphu, Samtse, and WangduePhodrang (Fig 142, Appendix B2.17).

Figure 141: Contemporary textile by education level (%) (N=4,271)

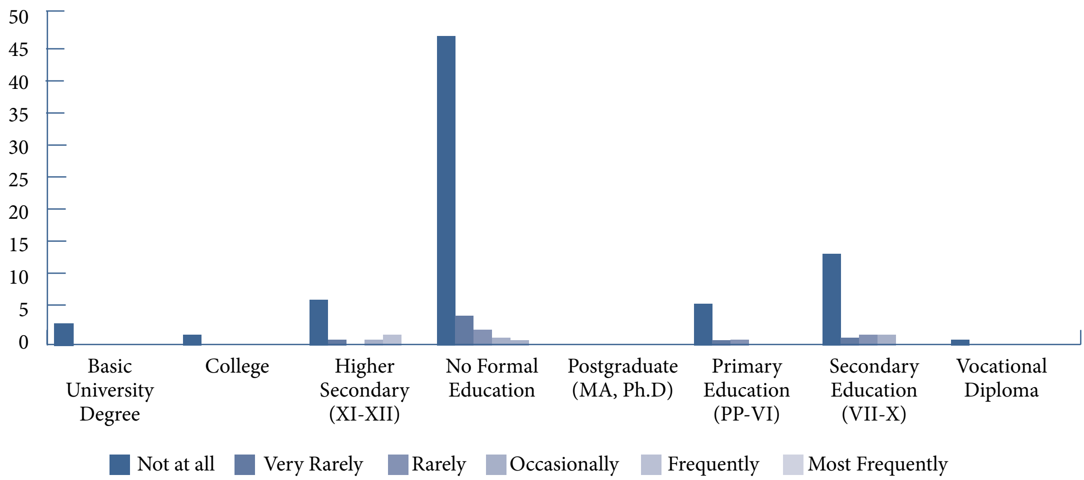
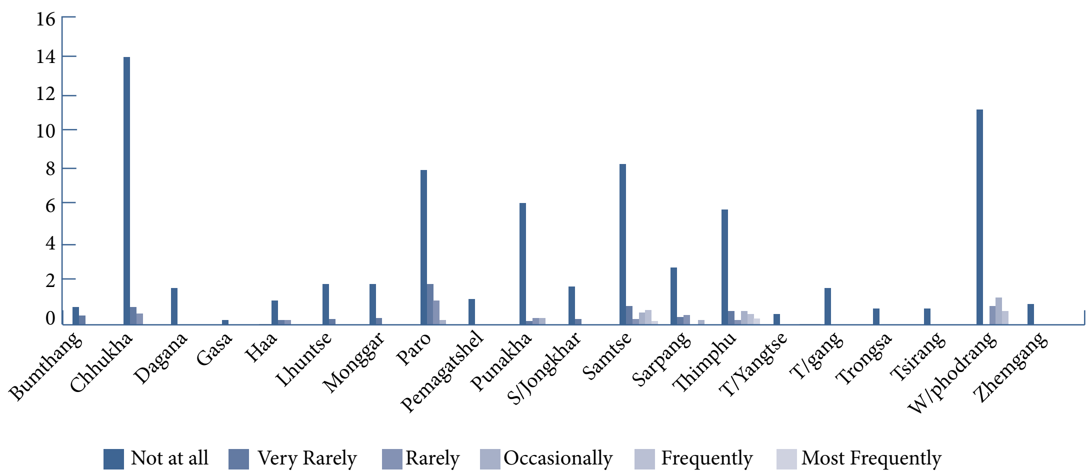


Figure 142: Contemporary textile production by Dzongkhag (%) (N=4,555



4.3 Income

The survey indicates that over 50% of the weaving households derive 'less than 25%' of their monthly household income from weaving. On the other hand, just over 18% derive '26-50%' and less than 5% derive over 50% of their household income from weaving. This looks much lower than what the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) found. The survey found that weaving generated about 15% of the wages and salaries as received by the weavers and that it contributed about 40% of the cash income to their households (p.21). However, this may not be as it looks. Apparently, the 40% appears to be generated based on the total household income from 'other sources' without including the income from 'wages and salaries'. If salaries and wages are included as part of the total household income from other sources of income, weaving should have contributed only 10.5% in the cited survey report. (Refer Table 62 along with weaving sales income per annum for the country on the same page; no page numbers are provided in the report for the annexures). Considering that over 20% have contributed from 26 – 99% to the household income, findings in this current survey, albeit not as impressive, may be a little better than what it was in 2010.

But there is a lesson to learn. If comparisons are to be drawn to see if the sector is doing better, remained the same, or be worse-off, questions must be structured cautiously in similar lines, if not the same. Whereas the current survey asked respondents to provide the percentage of household income derived from weaving in a month in terms of "less than 25%, … 100%" (to choose ONE from), the 2010 survey (MoHCA& NSB, 2013) asked two specific questions to arrive at the weaving's contribution to household income. The first question – *What is the total quantity produced, sold, self-use and income from the sale of your product for the past 12 months?* (Q.58) The response required was in terms of ticking against a list of products, quantities produced, quantities sold, sale income, quantities used, and costs they would have incurred if they bought from the market. The second question asked about what other sources of income did they have during the past 12 months (Q.59), requiring a response in terms of ticking the list of other sources and providing corresponding amounts of sources of income. The questions framed in the two cited surveys are not as straightforward for comparisons.

4.4 Basic Weaving Practice

Purpose of making textiles and assistance in weaving

The survey shows that about 85% of the textile products are mainly made for their own use or for gifts. While only less than 5% are made for either 'sell' or for 'exchange', about 15% are made based on orders, commission and/or weaving by elderly weavers as engagement during old age. Bhutanese Weaver Survey 2010 (MoHCA& NSB, 2013) also observed that about 70% of the production were made for the household's own consumption (p.16). On the other hand, a review of *Bhutan Living Standards Survey* reports (NSB 2003, 2007, 2012 & 2017) indicate that on average about 80 – 85% of the 'clothing and footwear' may be 'purchased' and another 10 – 20% of the 'clothing and footwear' consumed may be 'home produced'. Perhaps, about 85% of the textiles produced for home consumption may represent this 10 – 20%. It is a known fact that footwear's are not produced in homes in Bhutan. What this might indicate is that there is a huge gap between our consumption and production of textiles, making Bhutan largely dependent on the import of textiles. There might be an opportunity for Bhutan to do well in the textile industry under the right conditions. It would be helpful if the subsequent Bhutan Living Standard Surveys can feature 'clothing' as an item of its own.

Further, the survey shows that about 55% (over 65% - 2010 survey, Table 12b) of the weavers production are mainly helped by their family members, with over 45% (about 30% - 2010 survey, Table 13b) indicating as 'family or social obligation' as the main reason for rendering help. These indicate that weaving is still a very informal family production activity, which is consistent with the findings of the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013). On the other hand, the survey indicates that about 40% were not helped by anybody, indicating that weaving is still an isolated activity. Similar observation was also made by the 2010 survey. However, it is not clear as to how the 2010 survey report observed weaving to be an isolated activity. The question on the theme included only three items to choose from, i.e., 'family', 'relative and friends', and 'others' (Q.17). The 2021 survey included an extensive list of choices, including the item on 'Nobody helped me' (Q.22-2).

With just about 2% (2010 survey did not have a parallel question) indicating 'want to share their skills and knowledge' as the main reason for helping them in their weaving, transmission of skills may remain low. As such, the transmission of skills and knowledge needs to be formalised to ensure sustainability.

Rewards for assistance

The survey shows that about 55% of the reward for providing help in weaving is through 'family/social acknowledgements'. This may be a confirmation of the informality of the sector. However, just about 10% are being rewarded by 'cash payment', whether calculated by 'time', 'when products are sold', or 'upon distribution of profit after sale of goods'. This is in contradiction to the findings of the Bhutanese Weaver Survey 2010 (MoHCA& NSB, 2013), wherein 65% of the rewards to helpers were made by giving money (Table 15b). It almost appears that the sector has regressed in the last 10 years in this area of assessment. It was shown above under the same section that there existed a huge gap between consumption and production of textiles, which made Bhutan a net importer of textiles, and that there was opportunity for Bhutan to do well in the textile industry under the right conditions. Monetising the assistance provided in weaving could be one such condition. The textile industry cannot carry on the way it is right now. It must organise itself into a formal sector – a formal textile industry sector.

The survey shows that about 45% have not been rewarded for providing help in weaving, reasoning that it was due to either 'owing favours' or 'recalling'. This indicates a strong social relationship in the industry. This may be similar to the 2015 GNH survey findings (CBS&GNH, 2016), wherein it reported that 'community vitality' was one of the three of nine domains, which contributed most to the 2015 GNH Index (p.60).

Time spent on weaving, fixed times, periods

The survey shows that slightly over 50% have indicated as spending 2-4 hours a day weaving. Similarly, over 75% have indicated as having no fixed time when they do not weave. In addition, over 25% each have indicated that they do not weave during 'preparation of meals' and 'meal times', as well as 'time with family', 'rest time' and 'prayer time'. These are testimonies of the industry being an informal sector. It is also another evidence that hand-woven textile industry is a family-based, complementing family activities. *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) indicate that on average a weaver might work for about 3-4 hours in a week (Annexure Table 5). The same survey observed that while in the past 10 years small production units employing more than 10 weavers have been formed on commercial basis, these units are mainly located in urban centres and mostly family-run. (p.18)

Time taken to weave

The survey shows that overall *Karchang* takes the shortest time to weave (as indicated by about 80% of the respondents), with about 50% finishing between 3 days and two weeks. This is understandable as *Karchang Gho/Kira* are simple weaves without any kind of woven motifs/patterns incorporated; surface decorations rendered through colour yarns used as warp and weft. Such textiles come comparatively cheap, and generally used as everyday wear. (Yangchen & Choden, 2015, p.271)

On the other hand, the survey indicates that '*Hor Gho*', '*Kushuthara*' and '*Gho Shinglochem*' are said to take a long time to weave, from anywhere between a month to six months, to even a year and beyond. This is because they are said to be more complex and takes long time to weave, and as such are not meant for everyday wear (Yangchen & Choden, 2015, p.271-272).

4.5 Production

4.5.1 Capital

The survey shows that about three-quarters of the weavers use their 'savings' (<55%) and 'income from sales of textiles' (<20%) to finance their weaving. This proportion has gone up as compared to the observations in the Bhutanese Weaver Survey 2010 (MoHCA& NSB, 2013) which reported that about 25 – 40% of the source for financing their weaving came from savings and sale proceeds of their textile products (p.17 & Table 16b). This increase in the proportion of the use of their savings and sale proceeds of textile products for financing their weaving in the last 10 years seems to be proportionate to the increase in the production of textiles for their own use during the same period as seen under section 4.4 above.

The above observation indicates that the hand-woven textile industry is still independent from the financial institutions. This could mean either that weavers have more disposable income that do not require to rely on financial institutions, or that they have no access to financial institutions to take loans for their weaving projects even if they are required, or that the scale of their weaving activities are so small that they do not require loans. Whatever the reason, this calls for some deeper understanding of the circumstances. For now, since most of the textile productions are for their own consumption, they may not require additional capital. However, going forward, if the idea is to develop the hand-woven textile sector into a thriving formal textile industry, financial institutions (could play an important role) will need to be roped into the sector.

4.5.2 Raw Materials

Frequency of use of fibre types as based-material

Overall, the named traditional Bhutanese fibre types appear to be not commonly in use as raw materials for making Bhutanese weaves as indicated by high responses for 'not at all' category across fibre types, i.e., over 95% on average, with another 0.8% on average using it 'rarely'. This leaves very little as a proportion for those who use traditional Bhutanese fibres frequently as raw materials in their weaving. Among them most occasionally or frequently used is traditional Bhutanese cotton (2%), followed by nettle (0.6%), sheep wool (0.4%) and yak wool (0.3%). The incidence of a very low frequency of use of the named traditional Bhutanese fibre types seems to be quality issues coupled with high cost, mis-match between cost and quality, compounded by issues of accessibility sections indicate. This may be one of the many reasons for heavy reliance on imported fibre types, as the subsequent sections indicate, in the traditional Bhutanese textile industry.

On the other hand, imported fibre types seem to be more common in use. While on average over 60% have either not used or rarely used, about 25% have frequently or occasionally used imported fibres as raw materials for their weaves. Among the eight imported fibres, the most commonly (including occasionally) used imported fibre is Poly-cotton (Teri-cotton) (<75%), followed by spun silk (*Bura)*, Reeled or Filament silk (*Seshu*) and acrylic, which average around 35% each. This is further followed by cotton (industrial produced) (>20%) and mercerised cotton (Khaling cotton) (<10%), with wool and hand-produced cotton being less than 5%. The higher frequency of use of imported fibre types may be attributed to better quality of fibre types, better-match between quality and cost, and better accessibility. Analysis in the subsequent sections is indicative of these.

This is consistent with the trade import and export figures. Except nominally for one or two years, import of 'textile and textile articles' has been increasing from Nu.172.3 million in 2005 to Nu.1.3 billion in 2020 (MoF, 2005, 2010, 2015 & 2016-2020). However, export of the same 'textile and textile articles' has not kept pace with the increase in 'import'. The best 'textiles and textile articles' export year has been 2005 with the export value of Nu.787.13 million (<US$18 m; 1US$ = Nu.44 in 2005), (nearly 100% by 'Man-made filaments'), and the worst ever has been in 2018 with a dismal export value of Nu.0.524 million.

Satisfaction with the quality of fibre types

Overall, the satisfaction level with the quality of the named traditional Bhutanese fibre types appear to be very low among the users, i.e., just over 15% on average, highest being for traditional Bhutanese cotton (<25%), followed by sheep and Yak wool (<20% each) and nettle (<10%). Those that are not satisfied averaging over 80%, with a similar level of dissatisfaction across fibre types.

The overall satisfaction level with the quality of imported fibre types is also low, averaging slightly over 10% among its users. Satisfaction level is significantly higher for acrylic, reeled or filament (*Seshu*), poly-cotton and spun silk (*Bura*). Satisfaction level is much lower than the average for wool and various cotton, i.e., mercerised or Khaling, industrial and hand produced. Dissatisfaction levels over the quality of the cited imported fibre types are also higher, averaging about 90%. Dissatisfaction level is much higher for poly-cotton (<95%), spun silk and reeled or filament silk (around 90% each). Dissatisfaction level is lowest for acrylic.

Current cost by fibre types

On an average, slightly over 30% find the cost of traditional Bhutanese fibre types cheap or reasonable, with about 55% being for traditional Bhutanese cotton. Those that find it expensive, on average, are about 70%, with nettle and Yak wool above average and sheep wool and traditional Bhutanese cotton being below average.

On an average, about 70% of the users find the cost of imported fibre types either cheap or reasonable, with the highest for being cheap/reasonable recorded for poly-cotton and industrially produced cotton (<90% each), followed by acrylic (<85%), and Khaling cotton and hand produced cotton (>80% each). Others are below average, with the least being for reeled or filament silk (Seshu) and spun silk (Bura). Conversely, on average, about 30% find the imported fibre types expensive, with reeled or filament silk and spun silk recording around 60%.

Cost-Quality Relationship by fibre types

On an average, slightly over 70% are agreeable with the cost-quality relationship of the traditional Bhutanese fibre types with similar proportions across fibre types. Those that find it disagreeable, on average, are around 30%, with similar proportions across traditional Bhutanese fibre types.

On the other hand, on average about 80% find the cost-quality relationship agreeable, with the highest being for poly-cotton (<95%), followed by for *Seshu* (>90%), Khaling and industrial produced cotton (>85% each). Conversely, on average, about 20% find the cost-quality relationship of imported fibre types disagreeable, with very high proportion for acrylic (>45%).

Accessibility to fibre types

On average, about 80% find it inaccessible to get the traditional Bhutanese fibre types. Those that find it accessible, on average is over 20%, with highest being for traditional Bhutanese cotton (>40%).

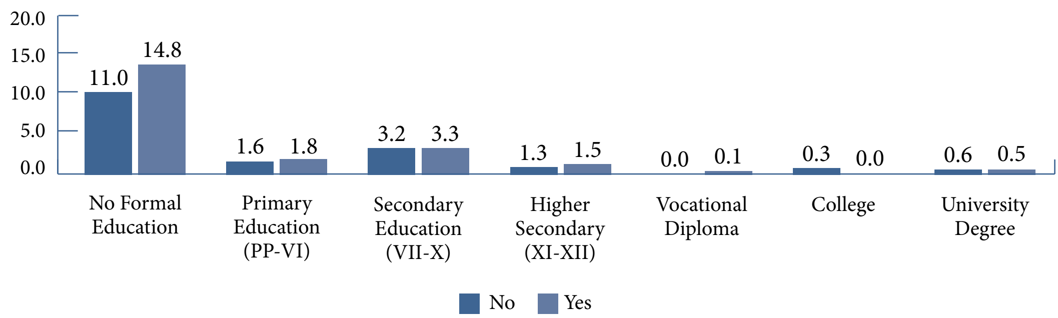
On the other hand, on average over 65% find the imported fibre types accessible, with the highest being for poly-cotton (<85%), followed by reeled or filament silk (<40%), spun silk (>35%), and industrial produced cotton (<95%). The lowest is for acrylic (<50%), followed by wool (>50%), mercerised cotton and hand produced cotton are about 65% each. On the other hand, on average, about 35% find the imported fibre types inaccessible, with high proportions for acrylic and imported wool (around 50% each) and the lowest being for poly-cotton (>5%).

4.5.3 Costing

Selling price fixation

The survey shows that while about 55% of the respondents have indicated knowing the final selling price of their textiles, about 45% have indicated otherwise (see Fig 43). Of the 18.2% who do not know their final selling price, a majority of them are with no formal education (11%), followed by those with primary to higher secondary level education (>6%); and college and university degree (<1%). However, the trend is also similar for those who know their final selling price. (Fig 143, Appendix B7.1(b). It would be a cause of concern when a sizeable proportion of weavers may not know the final selling price of their textile products. However, of those who know their final selling price, they actually calculate the selling price of their products. Of those who calculate their selling price, just about 45% know how to calculate for themselves, while over 55% may not be able to do so. The *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) reported that about 66 – 75% of the weavers self-determined the selling price of their products (p.18, Table 18b) and that about 95% of them determined the selling price themselves (Table 19b). It may appear that the data from 10 years ago were more positive than the current survey. The same survey did not ask as to whether they knew how to calculate the selling price or not.

Figure 143: Weavers who do not know or know their their final selling price by education level (%)



Factors affecting selling price

The survey shows that about 35% of the selling price was determined by 'demand' for the commodity, over 15% by 'mark-up/profit', as well as over 30% by unspecified 'others'. Less than 20%, including 'raw materials', 'design' and 'labour' were other causes affecting the selling price. Interestingly, design does not feature as affecting the selling price, indicating that textile products are not design-led as yet. Labour also does not feature as much of a factor affecting the selling price, perhaps much of the textile production is individual or family based, wherein the cost is not factored in as yet.

Satisfaction over selling price

The findings indicate that the satisfaction level with the most recent selling price of their textiles seems generally good. It shows that overall, the price and quality were acceptable to the market (<35%), with their selling price close to the market price (<25%), easy to sell with fast turn over (<20%), and that they had good profit from their sale (<10%). This shows that weaving is still an economically viable industry as also noted by the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013, p.15&21). However, while there is demand, the supply side may become the bottle-neck over the years. Figure 2 under section 3.1 above showed that the survey picked-up only about 12% of the weavers who are less than 25 years old (also see 4.1 above).

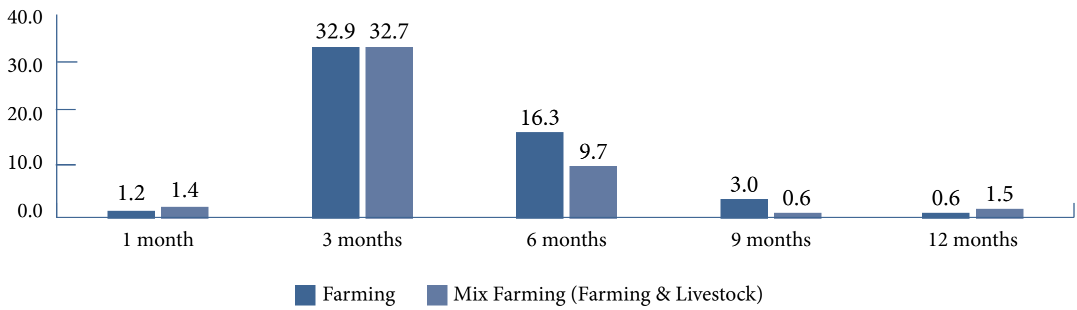
On the other hand, the survey also shows that there are others who are not as happy with the most recent selling price of their textiles. One of the main reasons for their unhappiness has to do with the cost of production being higher than the selling price (>55%). This is understandable as the inflation rate in

Bhutan for the past 5 years, i.e., from 2016 to 2020 increased averaging about 3.9% annually, ranging from 3.22% in 2016 to 5.63% in 2020 (NSB, 2018 & 2021). Therefore, the suggestion that the price of their products have remained almost the same over a 5-year period as compared with those in the market (<70%,) would mean that the value of their hand-woven textile has actually decreased. For that matter, those weavers whose prices have increased (<70%) over the past 5 years, may have been able to adjust their textile prices with the inflation rates.

4.5.4 Business Operations

The survey shows that nearly 100% of the weaving seems to happen at 'home'. It also shows that over 60% of the weavers spent about 3 months (<30%) to 6 months (<35%), and about 20% spent about 9 months (<10%) to even 'all year round' (>5%). Figure 8 under section 3.1 above indicated that for 14.3% of the respondents, weaving was their main source of income. Perhaps, the finding that over 15% weave from 9 to 12 months in a year seems to corroborate. Those who weave for about three months also practice 'farming' and 'mixed farming' in almost equal proportions; those who weave for about 6 months practice more of 'farming' than 'mixed farming' (Fig 144, Appendix B8.5).

Figure 144: Weaving with 'farming' and 'mixed farming' (%) (N=1,549)



Further, the survey shows that while weavers do not have any specific months that stand out, slightly more weaving seems to take place during the months from 'April to October'. The survey also indicates that weavers take time off from their weaving during farming season (<35%) and to have time with family (<30%) as well as for festivals and pilgrimages (>20%). This indicates that there is work-life balance among the weavers. This is consistent with *2015 GNH Survey* (CBS&GNH, 2016, p.80-81), wherein it reported that satisfaction level over work-life balance improved at a 0.1 significance level. A small proportion may also be forced to take time off owing to the unavailability of raw materials.

Furthermore, considering that Figure 8, 32.1% stated that farming is their main household income generation activity, it re-affirms that weaving is dominantly a rural industry. Weaving is also a very flexible economic activity. In addition, while 'home-based' alone may not qualify weaving to be identified as an informal economy, findings generally show certain characteristics of an informal economy.

4.5.5 Merchandising

The survey shows that, other than about 10% whose decisions are based on persons who order from and/or pay them and family members, over 70% of the weavers seem to make their own decisions as to what and how much to weave. This is a very good indication that weavers are generally autonomous and empowered.

The survey also shows that the decision as to what and how much to weave are largely based on orders from customers and the past years' experience and records (<20% each). In some smaller ways, decisions are also based on following trends, taking cues from other producers, advise from family and friends, market knowledge, etc.

4.5.6 Advertising and Promotion

The survey indicates that while over 45% of the weavers promote themselves as they sell, over 25% promote through family and friends and through word of mouth, and over 10% rely on their reputation for making good textile products. Social media being used minimally, if at all, may need some attention.

4.5.7 Purchaser Profile

Knowing customers

The survey shows that about 80% of the weavers know the purchasers of their textiles. This would indicate that they sell directly to their customers without relying on distribution channels. This corroborates with over 45% claiming that they promote their textiles themselves by selling themselves (Fig 59). These are good leads.

The survey also shows that the purchasers are mostly Bhutanese (near 100%). This indicates a domestic market focus. This may be consistent with the findings of the *Textile Consumption Survey 2021* (RTA, 2022, section 4.2) which found that while on average about 55% of the respondents purchased less than 5 pieces of *Gho/Kira* woven across looms in the past 24 months, an appreciable proportion of the respondents also purchased more than 6 pieces during the same period. Further, the same survey found that over 75% were likely or very likely to purchase *Gho/Kira* woven across looms in the future (section 4.5).

Bhutanese customers

The survey shows that over 80% of the weavers' main Bhutanese customers are other households and individuals in their localities. This corroborates well with the geographical distribution of their customers, wherein about 80% of their customers are from the same gewog, dzongkhag and the region. This indicates presence of a strong local market for their products. The findings also indicate that the proportion of female customers may be about 35% more than the male customers. Similarly, the survey shows that about 90% of their customers would be within the age range of 30 – 49 years. However, the *Textile Consumption Survey 2021* (RTA, 2022, section 4.2) found that while females tended to purchase slightly more than males, the purchase across age groups was found to be more or less similar.

Non-Bhutanese customers

The survey shows that the proportion of non-Bhutanese customers is very small (1.3%, Fig 61), among whom female customers would be comparatively higher than male. In terms of nationalities, the survey shows that proportion of international and regional (SAARC countries) customers were at the ratio of 75 to 25 percentages.

The survey also shows that while about 60% of the non-Bhutanese customers have purchased textiles worth less than Nu.100,000 (<US$1,400) in a single purchase in the past 5 years, there have been others purchasing textiles worth over Nu.100,000 to even beyond Nu.500,000 (<US$7,000) in a single purchase in the past 5 years.

The survey shows that on average the Bhutanese textiles are over 45% moderately to most popular among non-Bhutanese customers. Among the Bhutanese textiles, other traditional textiles such as *Rachu, Kera*, etc. are the most popular (<65%) among non-Bhutanese customers, followed by contemporary scarves and shawls (<60%). The least popular is *Yathra* textile (<25%), followed by traditional *Gho* textiles (>35%). Reverse is true for their unpopularity among the non-Bhutanese customers.

Of the 21 respondents who indicated having non-Bhutanese customers, most of them where with no formal education (>80%), followed by higher secondary education (<15%). These respondents are mostly based in Samtse (<50%), followed by Bumthang and Thimphu (<20% each). (Fig 145& 146, Appendix B11.14 & B11.15)

Figure 145: Weavers who sell to non-Bhutanese purchasers by education (%) (N=21)

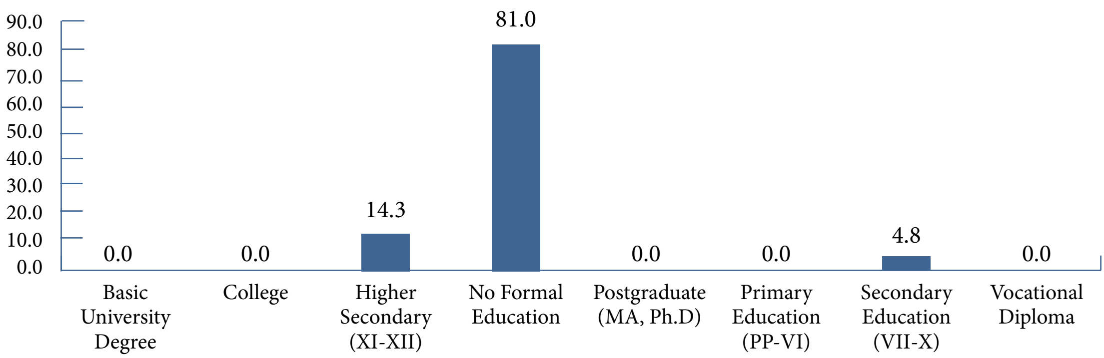
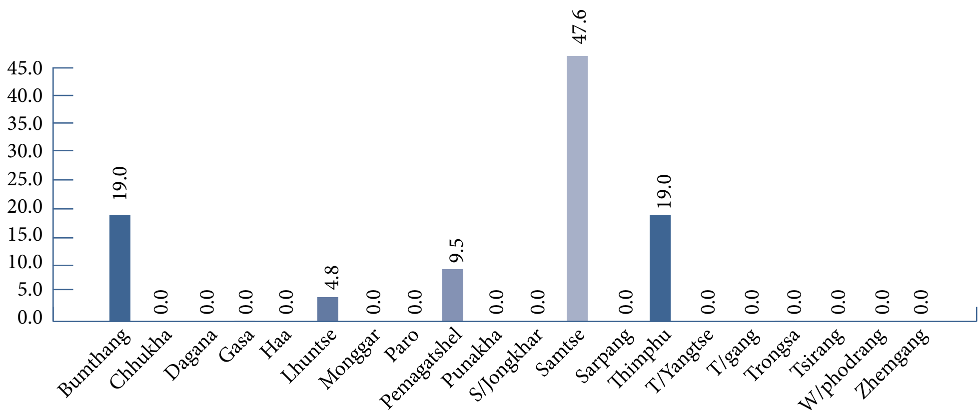


Figure 146: Weavers who sell to non-Bhutanese purchasers by Dzongkhag (%) (N= 21)



4.5.8 Marketing and Sales

Place of sale, customer location, sale modes

The survey shows that over 75% of the textile products are sold at home (<60%) and the local market (>20%) with just over 10% being sold across the country. This corroborates well with the geographical distribution of their frequent customers, wherein customers from the same gewog, dzongkhag and region constitute about 75%. The pattern is similar to the discussion under 4.5.7 above, under Bhutanese customers. It also shows that over 70% of the textiles are either directly sold to the customers or delivered to the customers of those made-to-order.

Whether or not there are challenges in selling products

The survey shows that about 60% of the challenges in selling their textile products are mainly to do with access to the market (35%) and affordability of their products by their customers (25%). Performance in these two areas seems to be worse-off as compared to the 2010 survey (MoHCA& NSB, 2013, Table 29b), which reflected challenges as about 25% and less than 20% respectively for 'access to market' and 'affordability'. Other challenges (<30%) in selling their products include lack of manpower, over supply and low price, lack of transportation, etc. The item on 'over supply and low price' (<10%) seems to have improved substantially from the 2010 survey which recorded nearly 45% as a challenge. However, while 'lack of manpower' recorded in 2010 was low (<5%), the current survey found nearly 10% as a challenge. Such challenges as indicated may be characteristic of the informal economy and informal nature of the textile industry in Bhutan.

On the other hand, there are others who face no difficulties in selling their textile products mainly because of good demand and products suiting the targeted market (<80%). This is a significant improvement from the 2010 survey (Table 30a&b), mainly because of the jump in 'good demand' from about 30% in 2010 to about 45% in 2020. Product suitability remained more or less the same. This indicates that there is demand for quality, suitably targeted textiles in the market.

Knowing what sells best/worst and why

The survey shows that over 50% of the weavers know their best-selling product in the last 5 years. It indicates that while the sale of *Karchang* constituted about 55% in the last 5 years, *Hor* constituted about 20%, and about 15% were *Bura*. Selling more *Karchang* is understandable as it is generally cheap and affordable (Yangchen & Choden, 2015, p.271) as compared to other textile products (see section 4.4 above). The selling price of their best-selling products in the last 5 years ranged from Nu.1,000 to even over Nu.100,000 (US$ 15 – 1,500+). Of these over 30% were within the range of Nu.1,000 – 20,000, about 50% within three ranges, i.e., Nu.21,000 – 40,000, Nu.61,000 – 80,000 and Nu.81,000 – 100,000 (>15% each). Similarly, around 10% each fetched within Nu.41,000 – 60,000 and more than 100,000.

The survey also indicates that while about 40% of the weavers were able to sell about 6-10 pieces in a year, about 30% were able to sell about 1-5 pieces, with another 20% being able to sell about 11-15 pieces. Yet, another over 10% were able to sell more than 15 pieces in a year. No parallel questions were asked in the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) to make any comparison on this theme.

The survey on the other hand shows that around 20% of the weavers had worst-selling products during the past 5-year period, of which over 35% had '*Kushuthara*' as their worst-selling product during the period. This is understandable as *Kushuthara* is said to be more complex and takes a long time to weave, even beyond a year, and therefore can be quite expensive (Yangchen & Choden, 2015, p.271-272). The weavers even had *Karchang* as their worst-selling product (<25%), contrary to those others who had *Karchang* as their best-selling product. This may have a lot to do with the quality of the products.

The survey also shows that nearly 45% of the weavers' selling price for their worst-selling product in the last 5 years has been within Nu.1,000 – 5,000, with about 30% and 25% of the weavers selling within Nu.6,000 – 10,000 and Nu.11,000 – 15,000 respectively. They have also not been able to sell much. About 80% of the weavers have been able to sell only about 1-5 pieces in one year and 15% have been able to sell about 6-10 pieces during the same period.

Reasons for the products not selling well, which included around 25% each of being too expensive (perhaps against a given product) and wrong size and about 20% of not attractive colour combination, etc. reconfirms the quality and standardisation issues with the textile products. Quality control and standardization of textile products become critical if the sector has to do well overall.

In a 5-year period – Quantity of textiles produced, Income from sale, Changes in sale

On an annual average in the past 5 years, the survey shows that about 55% of the weavers sold about '0 – 5 pieces', with another about 35% selling about '6 – 10 pieces'. On the other hand, while over 10% have been able to sell 11 – 15 pieces, about 3% have been able to sell even more than 15 pieces. This is very similar to the 2021 textile consumption survey (RTA, 2022, Fig 69, Appendix B2.25). The survey found that in the past 24 months, on average about 55% of the respondents had purchased 'less than 5' *Gho/ Kira* woven across looms, with another over 10% purchasing '6 – 10' pieces, and another less than 5% purchasing over 11 pieces.

Similarly, the survey shows that about 65% of the average annual price of textile products sold in the last 5 years ranged from 'Nu.0 – 50,000', with another over 25% the price ranging from 'Nu.51,000 – 100,000'. It also shows that the annual average price range of 'Nu.101,000 – 150,000' constituted over 10%, with another 1% whose price was more than Nu.150,000.

The survey also indicates that there have been fluctuations in the sale of textile products in the past 5 years. Whereas about 60% had an increased market share, sales for about 20% may have remained the same. However, about 25% may have faced a declining market. The *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013, Table 31b) found that about 85% reportedly viewed that there was an increased market for textile products, with over 15% expressing there was a decline in the market.

As indicated by the survey, a lot of the change (>75%) may have taken place in the last less than one year to about 2 years. Other smaller changes may have taken place in the last 3-4 years (>15%) and even in the last 5 years (<10%). Further, since the time periods of changes in the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013, Table 32 a & b) were in the intervals of 5 years, i.e., 'last 5 years', 'last 10 years' and 'last 20 years', other than the 'last 5 years', no useful comparison between the two findings can be made.

4.5.9 Payment Procedure

Making Payments

The survey shows that about 40% of weavers face challenges in paying suppliers, workers and/or creditors due to shortage of cash in hand, with another over 30% challenged by lack of access to financial resources including credit facilities. Another 20% are challenged by problems in sales turnover or cash flow and sales with poor profit.

However, on the other hand, about 50% of weavers face no difficulties in paying their suppliers, workers and/or creditors, owing to availability of cash in hand. This corroborates with findings in Figure 30 (see section 3.5.1 above), wherein about 55% of the weavers have relied on their savings to finance their weaving. Another significant reason is reportedly having easy access to cash or savings (>30%). Good sales with good profit and prompt payments from customers have also played a part in their having less difficulties.

Even though, proportionately more weavers have no difficulties in making payments, another significant proportion of weavers would require assistance in accessing financial resources through credit systems, etc. The *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) did not have a parallel finding on this theme.

Collecting Payments

The survey shows that over 50% of the weavers facing challenges in collecting payments from customers due to short of cash with customers, with another over 30% owing it to payments not being in cash. Difficulties in collecting payments from family and friends and difficulties in locating middlemen to obtain payments appear to be other factors affecting weavers.

However, there are weavers who face no difficulties in collecting payments from their customers because their customers always pay in cash (<40%), payment terms are in cash only (<30%), payments are immediate or have favourable payment terms (20%) and have trust worthy middlemen and who make timely payments (>10%).

While the former facing challenges show characteristics of informal and unorganised business ventures in the textile industry, the latter seems to present itself as more organised entrepreneurial weavers, albeit still being in the informal sector. The latter shows it is doable. It reaffirms the need to develop the hand-woven textile sector as an industry by itself. The *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) did not have findings to make any comparison.

Credit terms

The survey shows that while about 95% of the weavers provide certain credit terms to their customers under certain conditions, around 90% provide credit terms to be paid either within a week (>65%) or within a month (>25%). Perhaps this is the reason why a large proportion of weavers face difficulties in making payments to their suppliers, workers and/or creditors as well as in collecting payments from their customers as discussed above under 'making payments' and 'collecting payments'. This situation needs correcting, perhaps through establishing formal systems in the hand-woven textile sector.

Commissioned to weave – Most common practice

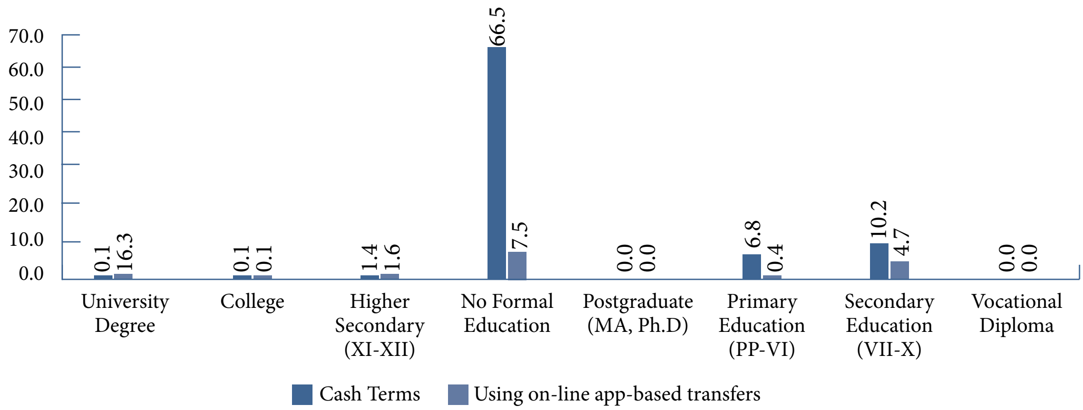
The survey shows that the most common practice in making payment as and when a weaving work is commissioned is, about 15% each do it on the basis of 'paying only for the purchase of all the yarns for the textile' and 'paying for purchase all the yarns and part of the labour cost for the textile'. Another minor common practice includes paying for the 'purchase of all yarns and all labour cost for the textile'.

However, with over 65% being non-responsive, it is difficult to make any concrete conclusion. Further, upon completion of the commissioned weaving, the manner in which weavers received their payment for the work, included – 'full payment for yarns and labour' (<45%); 'all or part of the labour as the yarns were already paid and the quantities were sufficient to complete the commissioned work' (<30%); and 'all or part of the labour and some of the yarn as the initial purchase of the yarns were not sufficient to complete the commissioned textiles' (<20%).

Mode of payment

The survey indicates that while over 55% still rely on cash payment, over 40% have relied on making payments through a cheque or money transfer and through online app-based transfers. While cash was preferred to a large extent by those without formal education, weavers with 'no formal education' and 'secondary education' also use online app-based transfers (Fig 147, Appendix B13.13).

Figure 147: Mode of payment by educational level (%) (N=1,916)



Usage of income or profit generated

The survey indicates that about 55% of the weavers use the income or profit generated from sale of textile products to supplement their household expenses. This may roughly corroborate with section 3.3 (Income), wherein over 50% derived 'less than 25%' of household income from weaving and another about 20% derived '26-50%' of household income from weaving.

Further, besides close to about 35% of the weavers who may save their profits generated or use it on their education, over 5% may plough back into weaving activities. This may appear to be inconsistent with the finding under section 3.5.1 (Fig 31) that about 20% of the weavers have financed their weaving activities from income generated from sale of textiles. However, this may not be so. Framing of question number 173 for the survey may have led to this inconsistency. While the income generated from weaving can be put to various use, most times necessitated by circumstances, the question forced respondents to choose only ONE response from the list. This question may have to be reviewed for its future use based on its purpose.

The survey indicates that while about 75% of the weavers themselves seem to be in charge of making decision on usage of the income generated, about 25% are decided by their spouses. This is a substantial improvement from the findings of the *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013), wherein the weavers taking decision themselves and their spouses were in equal proportions, i.e., 25% each. This may indicate gender equality in the weaving families.

Further, the survey shows that about 95% of the weavers were happy with the decision-making process on the usage of income generated.

4.5.10 Packaging for Delivery

Delivery of products

The survey shows that while over 40% of the products are sold in faraway places, about 60% are not. This could mean that this proportion of products is generally sold in their own localities. Findings under section 3.5.8 above show that only over 10% of the products are sold all over Bhutan. However, if 'local market' (>20%) is to be treated as 'faraway places', the two findings, i.e., 3.5.8 and 4.5.10 would corroborate. The *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013) asked a similar, but a more elaborate question (Q.30) on this. However, in the absence of any explanations being provided, the totals and corresponding total percentages in Tables 26a and 26b are not understood. Nonetheless, based on what totals and corresponding total percentages, it should have had as per the requirements of the cited question. The 2010 survey also found that about 30% of the products were sold to faraway places (Nearest town, Thimphu, Other dzongkhags). Taking 'local market' together with 'at home', nearly 80% were sold at home and in and around one's own localities. While it indicates that the places where they sell their products have not changed in the last 10 years, it also indicates that the local market is strong for such products.

The survey also shows that while about 70% of the weavers do not have difficulties in delivering their products to other places/regions, slightly over 30% face challenges. This is a slight improvement from 2010 survey, where the proportions were over 50% and close to 40% for the same themes (Table 28b). One of the main reasons associated with difficulties in delivering their products to other regions is the lack of transportation (vehicles) (<55%); other important reasons are lack of labour (>15%) and high cost (<20%), etc. However, as to the reasons for the difficulties, though not the same question, except a small proportion in eastern Bhutan, 'lack of transportation' was not a reason of concern as per the 2010 survey (Table 29b). This may be because despite the fact that the road network in the country has substantially improved in the past 10 years or so, perhaps it is not matched by the corresponding improvement in the transport network.

Packing the products

The survey shows that while over 40% of the weavers pack their products sometimes for delivery, slightly over 15% do pack their products on regular basis for delivery. This more or less may match with the proportion of products being sold in faraway places as seen above. Most common packing materials are (40%) each of plastic bags and cloth pieces, and about 20%, carton boxes. The survey however shows that about 45% of the weavers face challenges with packing their products for delivery mainly due to high cost (>50%) and lack of packing materials (<30%), as well as lack of experience (>15%).There has not been a parallel question on this in the 2010 survey.

4.6 Skills and Education

Learning weaving skills, passing on the tradition

The survey shows that over 65% of the weavers have learned weaving being handed down from their own ancestors and/or extended family members (25%), while another about 20% have learned from their friends or neighbours. Over 10% are self-taught. It indicates that sources of learning weaving skills are generally a family and peer matter. The 2010 survey (MoHCA& NSB, 2013, p.13 & Table 34b) recorded similar findings, if not the same. *Youth Attitudinal Survey on Weaving, Bhutanese Weaving Culture and Designing 2021* (RTA, 2022, p.44, Fig 32) had similar findings.

The survey also shows that over 60% of the weavers learned to weave when they were within the age range of 13 – 20 years, while over 25% have learned to weave while they were within 21 – 30 years old. At least about 10% of them learned to weave when they were below 12 years. While exactly the same questions were asked (Q.36, 2010; Q.185, 2021) in both the surveys, survey 2010 reported only in terms of average age of learning to weave, which averaged at 16 years (Table 33). Perhaps, details of the questions may have made the difference, that while the 2021 survey provided response options, 2010 survey did not. Nevertheless, overall, the findings in the two surveys appear similar. Interestingly, in both the surveys, institutions such as schools were not included in the consciousness of weavers as a channel to transmit weaving skills. Perhaps, it is due to the informal and traditional nature of weaving.

As to whether or not they hope to pass on their weaving skills to others, reasons stated for doing so are varied. While over 35% are keen to carry on the family tradition and continue traditional handicrafts in the community, slightly over 30% would like to promote this craft and help others. Further, while over 15% would like to do it for economic reasons for the family/community, about 15% because of the encouragement from the leaders. (Fig 110, Appendix B15.3) The 2010 survey found that 68% of the weavers wanted to pass on their weaving skills to others for the same reasons as stated above, wherein 'helping others' featured very high, with economic reasons featuring, more or less, on the other extreme end (Table 35b &36b). The swing in the focus between the two surveys is a shift from 'help others' (2010, Table 36b) to 'to carry on tradition' (2021), with 'economic reason' remaining more or less the same (13% 2010, Table 36b & 15% 2021).

The survey did not indicate any one not wanting to pass on the skills to others. This is a significant change from the 2010 survey, wherein over 30% of the weavers had indicated not wanting to pass on their weaving skills for similar reasons as stated above.

Data shows that perceived responsibilities to pass on the weaving skills seem to fall on 'family' (<25%) and to 'any who is interested' (>35% each), followed by 'friends' and 'community' (around 20% each).

Improving skills

The survey shows that on average the urgency for improving skills in textile designing and technical skills expressed at about 85% is about 15 percentage points higher than for improving general and business skills which are about 70% each on average. The 2010 survey (MoHCA& NSB, 2013, p.14, Table 39b) had similar findings where about 80% wished to improve their weaving skills.

Training need items within the textile designing and technical skills is expressed on average around85% across items. Urgency of training needs expressed under general and business skills improvement are around 70% across training items. This is higher than as found in 2010. The 2010 survey found that only less than 20% were interested in 'entrepreneurship training' (Table 56b). The need for improving general skills was not asked in the 2010 survey.

As per TVET Quality Assurance Management Information System (MoLHR, 2021), weaving and designing skills training are provided by a few institutes and centres of varying duration leading to various skills certification levels. These include – 4-year certificate programme by Choki Traditional Art School (5 candidates per year); certificate programme by Draktsho Vocational School, Kanglung (5 candidates with disabilities per course); 2-year weaving and dyeing NC2 certificate programme by National Institute of *Zorig Chusum*, Thimphu (However, this is not started as yet as there are no takers; short-term courses were taken by 3 candidates between 2015 and 2018); NC3 fashion designing course by Fashion Institute of Technology (75 candidates per course); and certificate course in fashion designing by Institute of Tailoring and Fashion Design (30 candidates per course). Similarly, the Royal Textile Academy is listed as providing certificate level courses in dyeing, basic weaving (plain weaves), basic pattern weaving (*Sapma* pattern), intermediate weaves (*Mentha* with *Hor*), and advanced weaving. Further, the Weaving School of the RTA has provided training to over 200 trainees since 2016, in batches of 20 trainees of 3 months duration, which included weaving training on *Hor, Trima,* etc., being supported by the MoLHR (RTA website, 2022). Also being supported by the MoLHR, 20 Bhutanese weavers were trained in Textile Art and Design at Chiangsean International Institute for Skill Development in Thailand (The Bhutanese, 2013). Furthermore, the Youth Development Fund established a Green Weaving Centre in 2020 to teach and preserve the methods and materials used in traditional Bhutanese weaving, as well as its history (YDF website). It indicates that a lot seems to have taken place, but more still needs to be done to take the hand-woven traditional Bhutanese textile to greater heights.

The National Handloom Development Centre at Khaling in Trashigang has been training about 20 weavers annually over many decades against their maximum capacity of 40. However, the Covid-19 pandemic has forced the training at the centre to be suspended for the past 2 years.

Mode of improving weaving skills

The survey shows that about 50% of the weavers would like to improve their weaving skills from others while another about 35% would like to improve through more practice. The remaining would be interested in improving through taking part in training courses, learning more from master weavers, and through more exposure.

Preferences for training

The survey shows that whether the frequent short-term training is for a week or up to a maximum of 1 month, about 75% of the weavers would prefer such trainings as long as it is within their own localities. The proportion of preference for training for the same duration, i.e., within 1 week and within 1 month, at a regional or centralized at RTA drops by 5 percentage points for within 1 week duration and by 10 percentage points for within 1 month duration.

The preference for the training of 1 – 3 months at a regional or centralized at RTA drops to about 60%. However, for some reason, preference for training duration of 1 – 3 months centralized at RTA jumps up by about 10 percentage points as compared to training duration of 6 months to a year to be organised at a regional or centralized at RTA.

The survey shows that about 75% of the weavers would prefer September to February for the trainings during the year. The proportion of preference during these months may range from about 10% in September/October to over 15% in November/December. Preference during other months are low which may range from about 2% (May) to over 6% (April). This may not coincide with those months, i.e., April to October, when sizeable weavers may not weave. (Refer Fig 55, Sections 3.5.4 and 4.5.4)

Weaving skills certification

Survey shows that most weavers would like their weaving skills to be certified for various reasons, including over 45% for validation against national standards, gauging standing as a weaver, and for further improvement purposes. About 35% would like to be certified as a sense of pride and worth, while less than 15% would do it for economic and employment opportunities. However, a small group may not like their weaving skills to be certified for reasons of simply not being interested in their skills being officially validated and/or that they either know their own standards or that the people know the standards of their weaving, and therefore, do not need to officially validate their skills.

Training cost

The survey shows that only about 10% of the weavers think that it is reasonable to charge a fee for any of the listed trainings that the respondents are interested in. Out of that, slightly over 25% would be willing to contribute to the cost of listed trainings. This may be because the transmission of weaving skills has been informal. therefore weavers do not see the need to pay for trainings. The question would be as to how to change the mind-set of the weavers. Perhaps the next survey could include reasons why they are not willing to pay for the trainings.

Language proficiency

The survey shows that while about 35% of the weavers' spoken Dzongkha is good, spoken Dzongkha for over 50% of the weavers is average or lower. Similarly, while around 10-15% of the weavers are good in reading and writing in Dzongkha, about 30% are average or lower in the same skill area. The remaining weavers have no proficiency in Dzongkha across skills areas. Further, the survey shows that while about 10% of weavers have good proficiency in English across skills areas, over 25% are of average or lower proficiency levels. The 2010 survey (MoHCA& NSB, 2013, Table 3b) shows that the literacy levels of weavers in Dzongkha and English were respectively 37 and 22 percentages, which may be quite similar to the current survey findings.

4.7 Design and Technology

Sources of ideas for textile products

As a source of ideas for the textile products, the survey shows that about 50% are copying from other products. Other minor sources include suggestions from customers and orders, traditional products, designs and style and suggestions from family and friends. Their own creations are very low and sources of ideas from master artisans are almost non-existent. In the 2010 survey (MoHCA& NSB, 2013, Tables 45a&b), 'self' (<35%) and 'relatives and friends' (>30%) featured high as sources of ideas for their textile products. The survey then did not include 'copying from others and other products' and 'from master artisans', which are the options in this survey. It may appear that their own creations (self) were better 10 years ago. Of course, this is not clear whether structure of the questions in the two surveys had a role to play.

Interest in creating textile designs

Even though their own creations as a source of ideas for their textile products is low as of now, the survey shows that about 75% of the weavers are interested in creating their own designs. This aspiration is similar to the findings in the 2010 survey (MoHCA& NSB, 2013, Table 56b) wherein about 65% of the weavers expressed assistance needed in 'design training'.

Quality of textile products – self-declaration

The survey shows that slightly over 70% of the weavers believe that the quality of their textile products is comparable and/or even better than those in the market. However, about 15% of the weavers believe that their products were of inferior quality than those in the market. While there has not been a parallel question on this, the 2010 survey (MoHCA& NSB, 2013, Tables 58a&b) found that about 55% of the weavers rated themselves as average weavers, with another about 35% rating themselves as skilled weavers. Slightly over 5% also rated themselves as expert weavers. Perhaps, the two findings may corroborate in some ways.

4.8 Social Capital and Happiness

Continuing the tradition, culture

The survey shows that about 70% of the weavers like weaving/work on their textiles/textile products mainly because it enhances their income thereby improving their living conditions, that it is self-fulfilling, taking pride in culture, and their interest in making textile products. Other significant reasons also include association with high prestige and ease in accessing raw materials. Other minor reasons include people's interest in the products, good market demand, continuing family tradition, ease of production, etc.

On the other hand, the survey shows that a small group may not want to continue weaving/work on textiles/textile products due to lack of market, lack of interest in continuing the tradition, perceived low prestige, unable to generate income to improve living conditions, not proud of the culture, lack of self-fulfilment, etc.

2010 survey (MoHCA& NSB, 2013, p.20) reported similar findings wherein 3 out of 4 weavers expressed that their motivation for weaving was to contribute to the family's happiness and the need to generate income for the family through weaving.

Enjoying the weaving profession – Being Happy

As to whether the weavers find the weaving or working on their textiles or textile products interesting, rewarding and enjoyable most or all of the times or some of the times, the survey found that the responses are mixed. Similarly, as to whether or not the weavers find the weaving work difficult, while over 60%

find it difficult some of the times, some find it difficult most or all the times (<20%) and some do not find their weaving work difficult (<15%).

On the question of level of happiness of the respondent weavers, most of them seem either ‘happy’ (<55%) or ‘very happy’ (<40%).

5
RECOMMENDATIONS

5.1 Hand-Woven Textile Sector as a Formal Textile Industry

5.1.1. Organisation of hand-woven textile sector as a formal textile industry: Organise and professionalise Bhutanese hand-woven textile sector as a formal textile industry through institutionalisation of production system, enhancing specialisation in various stages of production, encouraging and nurturing creativity and innovation, formalisation of value and supply chain linkages, establishing quality frameworks and certifications, adding value to textile products, product diversification, etc.

5.1.2. Institutionalisation of production system: Institutionalise the production system, through putting in place strong, coordinated and holistic support system, including roping in financial institutions into the sector, accessibility to quality raw materials, etc. This should be inclusive of encouraging the development of industry clusters to enhance the production system, professional warpers, specialising the various steps in weaving and making it systematic, having in place specialist masters, etc.

5.1.3. Creativity and innovation in the hand-woven textile industry: Encourage creativity and innovation in the traditional Bhutanese hand-woven textile sector, wherein innovation is guided with sound knowledge on weaving, fibre, dyeing, yarns, finishing, etc. Encourage creativity and innovation in the sector through mechanisms such as rewards, recognition, access to information / open communication, as well as having speedy decision-making processes in place. A culture of creativity and innovation in the sector can bring about improvement in production flexibility and in product quality. Additionally, weaving programmes should include creativity and innovation, including textile designing as a means while re-capitalising weaving cultural resources.

5.1.4. Establishment of quality control and supply chain linkages: Establish quality control and supply chain linkages through formalisation of value and supply chain linkages, establishment of quality framework, certification of origin and green product labels, including establishment of a circular economy, return logistics, packaging, etc. This must also necessarily include quality and standard checks on imported fibre types.

5.1.5. Availability of easily accessible, affordable, quality Bhutanese fibre types: Establish production systems for Bhutanese fibre types, including supply chain linkages, which would have to ensure the availability of easily accessible, affordable, and quality Bhutanese fibre types (traditional Bhutanese cotton, nettle, sheep wool, and yak wool, etc.) in the market; as well as encouraging their frequent use. This should also include exploring possibilities of enhancing production of 'man-made filaments', both for local consumption and export purposes. One time export of man-made filament in 2005 earned Nu.787 m (<US$18.0 m) (in 2005 – 1US$ = Nu.44).

5.2 Education and Skills of Weavers

5.2.1. Transmission of design and weaving skills: Transmission of knowledge and skills remain low. Transmission of knowledge, design and weaving skills is recommended to be formalised to ensure sustainability through various means, including through purpose-built institutions/centres, *Zorig Chusum* institutions, schools, etc.

5.2.2. Enhancement of education and skills of weavers: Establishment of a Bhutan National Institute of Textiles/Fashion Technology as recommended by the *Youth Attitudinal Survey 2021* (RTA, 2022), if and when it gets established, could be used to enhance skills training requirements of weavers. The skills training needs could mainly focus on the following:

- Textile designing and technical skills, including for –
  - Traditional textile weave design, colour combinations, natural dyeing, contemporary textile weave design, upgrading existing weaving and textile production skills on back-strap loom, new weaving techniques and production skills on Meche loom, and textile finishing techniques, as well as for fibre knowledge and yarn spinning and plying.

- Business skills improvement, including for –
  - Production planning, time management, financial management and accounting skills, determining selling price, etc.

5.2.3. Levels of training programmes, duration and certification: Levels of training programmes, duration, location, and certification can be closely associated with recommendations made in the *Youth Attitudinal Survey 2021* (RTA, 2022).

5.2.4. Engaging and expanding the roles and scope of the current institutions/centres: A few institutions and centres currently provide weaving and designing skills training of varying duration leading to various skills certification levels. These include – 4-year certificate programme by Choki Traditional Art School; certificate programme by Draktsho Vocational School, Kanglung; 2-year weaving and dyeing NC2 certificate programme by National Institute of *Zorig Chusum*, Thimphu; NC3 fashion designing course by Fashion Institute of Technology; and certificate course in fashion designing by Institute of Tailoring and Fashion Design; training by National Handloom Centre at Khaling in Trashigang, and the Royal Textile Academy that provides certificate level course in dyeing, basic weaving, basic pattern weaving, intermediate weaves, as well as in advanced weaving. It is recommended that these institutions be engaged, and that their roles and scope be expanded to address the needs of the hand-woven textile industry. At the same time, others need to be encouraged to join the sector to take the sector even to greater heights.

5.2.5. Introduction of weaving programme in schools: As recommended by the *Youth Attitudinal Survey 2021* (RTA, 2022), in consultation and collaboration with the Ministry of Education, weaving programme needs to be introduced in schools. Introduction and exposure to weaving when youth are in schools is the best way for youth to experience weaving. The programme/course in schools could include introduction to diversity of Bhutanese textiles along with their various names, differentiation of various weaves, aspects of exposure and identification of various motifs used in the traditional Bhutanese textiles, exposure and use of various looms, familiarity and use of various dyes and their ingredients. The programme must also introduce students to designing in textiles. The programme could have both practical and basic level skills training and theory components, including various processes involved.

5.3 Survey Questionnaire Design

5.3.1. Treatment of hand-woven textile sector as a separate economic activity in the *Labour Force Surveys* (LFS): Although hand-woven textile industry is more of home-based and an informal sector thus far, the sector is very important both in terms of Bhutanese culture and economic relevance. As such, NSB needs to consider incorporating 'hand-woven textile sector' as a distinct, major economic activity by itself, in the *Labour Force Surveys*, rather than being treated as an item under 'manufacturing', clubbed with 'cane and wood products', as is the case at the moment.

5.3.2. Development of Standard Occupational Codes and Standard Industrial Classification for hand-woven textile workers: As of now Bhutan has not developed the Standard Occupational Codes and Standard Industrial Classification for workers in the hand-woven textile sector. Development of such standards needs to be considered in earnest and used in the *Labour Force Surveys*.

5.3.3. 'Clothing' as a separate item in the Bhutan Living Standard Surveys: *Bhutan Living Standards Survey* reports (NSB 2003, 2007, 2012 & 2017) indicate that on average about 80 – 85% of the 'clothing and footwear' may be 'purchased' and another 10 – 20% of the 'clothing and footwear' consumed may be 'home produced'. This indicates that there is a huge gap between the consumption and production of textiles. Therefore, it would be helpful if the subsequent Bhutan Living Standard Surveys can feature 'clothing' as an item of its own.

5.3.4. Sampling, data collection designs: For consistency, comparability of data and creditability, the data collection designs for future surveys must continue to be maintained as three regions, i.e., central, eastern and western regions, including Thimphu dzongkhag, with Thimphu City being considered as the fourth region (consistent with 2010 survey design). The weaver household selection for information collection could be through circular systematic sampling – a standard international sampling methodology, the sample size of which could be derived using the most current *Bhutan Living Standard Survey*.

5.3.5. Identification of the origin of weavers and current place of residence: In order to determine the origins of weavers (from which dzongkhags) and their current place of residence, future surveys should capture both their permanent and current residence in the data collection, disaggregated by rural-urban locations.

5.3.6. Estimating annual family income: Estimating annual family income through use of terms such as 'low', 'middle', 'high' income, unless defined, is relative and subjective, and therefore, not so useful for the purpose. For future surveys, income levels – low, middle, high – needs to be defined based on an analysis of Bhutan poverty and living standards, as well as GNH surveys, providing a certain range of incomes for each income level, i.e., say, two ranges for 'low' – one, capturing below the poverty level and the other capturing extreme poverty; three for 'middle' – capturing 'middle', 'low middle' and 'high middle'; two for 'high' – one, capturing the starting of 'high', the other capturing beyond certain limits; etc. Alternatively, proxy indicators could also be used such as whether or not they own a TV, car, bicycle, mobile phone brands, etc. to estimate the family income. However, translating into quantifiable income levels may be a challenge.

5.3.7. Geographical Indication: For any textile products, i.e., traditionally or historically known to be produced in a particular location, future surveys must provide a geographical indication for that product, e.g., say, *Yathra* in Bumthang, etc.

5.3.8. Production frequency determination of contemporary textiles/fabrics: Future survey must combine current survey Question numbers 23 and 24 and provide an exhaustive list of contemporary textiles/fabrics with possibilities for multiple marking against the listed textiles/fabrics. Further, the survey must focus only on textiles and not on secondary products.

5.3.9. Determination of household income from weaving: In order for better comparisons to be drawn to see if the sector is doing better, remained same, or is worse-off, questions must be structured cautiously in similar lines, if not same. Therefore, future surveys could base questions on the 2010 survey (MoHCA& NSB, 2013), which asked two specific questions to arrive at the weaving's contribution to household income. The first question – *What is the total quantity produced, sold, self-use and income from sale of your product for the past 12 months?* (Q.58) The response required were in terms of ticking against list of products, quantities produced, quantities sold, sale income, quantities used, costs they would have incurred if they had to buy from the market. The second question asked about what other sources of income they had during the past 12 months (Q.59), requiring response in terms of ticking the list of other sources and providing corresponding amounts of sources of income.

5.3.10. Determination of level of cohesion within families: Future GNH surveys could incorporate a component on weaving to determine the level of cohesion within families who practice weaving and those who do not practice weaving.

5.3.11. Determination of time taken to weave textile products: For future surveys, Q.Nos.34 to 37 can be combined into a single question to arrive at quantifiable responses, wherein a list of textile products can be provided against which time ranges can be mentioned. The question should allow for multiple responses against the listed textile products, however, allowing for only one response for the time taken.

5.3.12. Determination of changes in the value of textile products: In order to factor in inflation, Q. No.112 in future surveys could be reformulated to ask if the value of hand-woven textile increased, decreased or remained same in the last 5 years.

5.3.13. Factoring cost of raw materials: The next round of survey could have a section on the cost of raw materials, such as "In your view, do you think that the cost of yarns have increased, decreased, or remained the same in the last 5 years?", which should be for all the different types of yarns.

5.3.14. Advocacy and promotion: For the next survey, Q. No.119 should perhaps be asked as – 'How do you promote yourself?'; providing a list of possible ways of promoting themselves including use of digital or virtual modes of advertisement or promotion.

5.3.15. Marketof textiles to non-Bhutanese customers: For future survey questionnaires, there could be a question included as to where the weavers sell their textiles to non-Bhutanese customers, as well as for capturing nationalities of the non-Bhutanese customers.

5.3.16. Usage of income or profit generated: For future surveys, Q.No.173 needs to be reviewed and rephrased to allow for multiple checks in the choice of responses, rather than allowing for only ONE choice.

5.3.17. Use of packaging materials for delivery: For the next round of survey, the survey could also ask what packaging materials the weavers use for delivery, as well as labelling their packages and branding.

5.3.18. Willingness to pay for trainings: The next round of survey should include the reasons why weavers may be unwilling to pay for their trainings.

5.3.19. Community participation: For future surveys, there is a need to include aspects of community participation, as was in the 2010 survey. This will examine community cohesiveness through weavers' perspective.

5.3.20. Longitudinal studies to follow certain weavers under 25 years: Longitudinal studies involving a few weavers under 25 years of age can be conducted for about 10 years to follow through on their continuity with weaving profession, as well as to determine the impact of interventions as may be provided to them.

6
CONCLUSION

The first ever survey on the Bhutanese Hand-woven textile was carried out in 2010, titled *Bhutanese Weaver Survey 2010* (MoHCA& NSB, 2013). This current *Bhutan Hand-Woven Textile Industry Survey 2021* is the second such survey being conducted on the textile industry in Bhutan. These reports have articulated the status of the hand-woven textile industry in 2010 and 2021. While time and circumstances have impacted this sector, some issues remained unchanged. To conclude, these are some of the pertinent issues that characterise the hand-woven textile industry in Bhutan today.

Age

There are many similarities between the findings of the two surveys. Both the surveys found that women below 25 years of age women weave as compared to 25 – 34 years age group women. The difference in 2010 between weavers below 25 years of age and those between 25 to 34 years of age was about 20%. In 2021, the difference has increased to 25%. However, considering weaving as main family economic activity, the difference between below 25 years age group with those age group between 26 – 45 years is about 68% (Fig 134). It is alarming that although weaving practice is temporary secured, the future of weaving practice is very uncertain. Such findings have implications for the continuation of the industry and importantly, the sustainability of weaving practice as one of Bhutan's cultural expression and identity. As explained in this report, this endangerment is perhaps due to the success of Bhutan's education system.

Economic importance of weaving

The survey found that weaving contributed to household income, albeit in varying degrees – from less 25% (>50%), to about 26-50% (<20%) (Fig. 20). 2010 survey found that weaving generated about 15% of the wages and salaries, which contributed about 40% of cash income to their households, indicating that the sector had significant economic potential under the right conditions. Importantly, the 2021 survey found that for about 15% of the respondent weavers, weaving constituted as their main family income activity, of whom about 70% were without formal education (Fig 135). However, as the profile of the population changes, for example, as the population gets more educated (as explained in this report), the importance of weaving as the main economic activity to generate family income may over time dwindle significantly.

On the other hand, the survey revealed that there is a huge gap between consumption and production of textiles, making Bhutan largely dependent on the import of textiles. Surveys have also shown that weaving is economically a viable sector. This indicates an opportunity for Bhutan to do well in the textile industry under the right conditions. First and foremost, a serious consideration needs to be given to organising the hand-woven textile sector as a formal textile industry sector, a sector that will be economically vibrant, a sector that will provide much needed employment to large sections of the society, whilst keeping the rich tradition and cultural heritage dynamic.

Migratory patterns impacting on traditional geographical identification of textiles

Another observation derived from this survey is the migratory patterns of weavers. In the 2010 survey, 52% of weavers who had identified weaving as their primary occupation was from the east, 46% were from the west (including Thimphu). Presently, the survey found that weavers from the east only constituted 27.9%, while 62.5% are now based in the west (including Thimphu). This has consequences in the way certain textiles are traditionally identified with certain communities and geographical locations. Traditional geographically identified textiles are evolving. It may no longer be true that certain textiles are ONLY produced in a particular region. As weavers migrate, they take along their skills and weaving practices and continue their weaving practice in wherever they settle. For instance, *Yathra* is traditionally known to be woven exclusively in Bumthang. This survey found that *Yathra* was also woven in Paro, albeit in small measures. Yarns today may be more accessible. For instance, in wanting to continue the tradition of weaving, about 10% (Fig. 130a) of the respondents indicated ease of accessing raw materials as the reason. Imported fibres are more easily available than Bhutanese fibres (section 4.5.2).

Traditional vs Contemporary textiles

The 2021 survey found that over 85% of the weavers did not at all weave contemporary textiles (Fig. 19b). Just over 5% wove contemporary textiles either frequently or occasionally. The 2010 survey had similar findings wherein it reported that production under the non-traditional production items against the production of traditional textile items was insignificant. On the other hand, the 2021 survey found that about 60% of the respondents claimed that contemporary scarves and shawls and soft furnishings were quite popular with non-Bhutanese customers (Fig 72e). It indicates there is market for it, although small at the moment. Further, an important observation is that the urgency of improving skills in contemporary weaving designs were expressed by about 85% of the respondents (Fig 114b). This indicates that contemporary textile weaving may have a good future, both in terms of weavers and the market. This aspect of the textile, therefore, needs to be carefully nurtured alongside the traditional textiles development.

Nature of weaving as practised in Bhutan

Since the last survey, the weaving sector continues to be practised predominantly as a very individual and isolated activity, with production characterised by a high level of fragmentation and almost total lack of organisation, including value-chains and lack of specialisation.

While most weavers have learned to weave when they were within the age range of 13 – 30 years, the sources of their weaving skills have generally remained as a family and peer matter. Schools and institutions have played very little or no role at all in transmitting weaving skills. The survey also shows that there is high interest among weavers for improving their skills in textile designing and technical skills. Accordingly, the sector may do well formalising transmission of skills and knowledge to ensure sustainability.

The current survey also found some significant improvements since the last survey. While the current survey did not find any one not wanting to pass on their weaving skills to others, a significant proportion of weavers did not want to pass on their skills in the last survey. The proportion of weavers taking decisions on the usage of the income generated have also substantially improved from the previous survey. Training needs on general and business skills have also increased since the last survey.

Furthermore, the hand-woven textile industry is still independent of the financial institutions. This calls for some deeper understanding of the circumstances. For now, since most of the textile productions are for their own consumption, they may not require additional capital. However, going forward, if the idea is to develop the hand-woven textile sector into a thriving formal textile industry, which it must, financial institutions will need to play a crucial role.

The textile industry cannot carry on the way it is right now. It must organise itself into a formal sector – a formal textile industry sector – being supported, nurtured and cared for by the system, in particular the relevant state and non-state actors alike.

7
REFERENCES

Adams, Babara S (1984). Traditional Bhutanese Textiles. White Orchid Press, 1984. ISBN: 9748735621.

APIC (2014). *Druk Thagzo: The Art of Bhutanese Textile*. Catalogue 2014. Agency for Preservation and Promotion of Indigenous Crafts, Ministry of Economic Affairs, Royal Government of Bhutan, Thimphu. [Accessed from http://www.apic.org.bt/wp-content/uploads/2018/07/Druk-Thagzo-The-Art-of-Bhutanese-Textile.pdf on 17/01/2022].

APIC (2017). Bhutanese Art of Textile Weaving – Druk Thagzo. In *Arts and Crafts of Bhutan* by Agency for Promotion of Indigenous Crafts (APIC), Ministry of Economic Affairs, Royal Government of Bhutan, Thimphu. First Edition 2017; ISBN 978-99936-702-0-9; BICMA No. 100000542. (pp.199-265).

APIC (2020). Bhutanese Art of Textile Weaving – Druk Thagzo. In *Arts and Crafts of Bhutan* by Agency for Promotion of Indigenous Crafts (APIC), Ministry of Economic Affairs, Royal Government of Bhutan, Thimphu Second Edition 2020; ISBN 978-99936-702-0-9; BICMA No. 100000542. (pp.197-265).

Bartholomew, Mark (1985). Thunder Dragon Textiles from Bhutan. Shikosha; First Edition (January 1, 1985).

Bean, Susan S (Editors, 1994). Introduction: Bhutan, Its Textiles, and the World. In *From the Land of the Thunder Dragon – Textile Arts of Bhutan.* Copyright of Peabody Essex Museum. ISBN 0 906026 31 8. Published by Serindia Publications, 10 Parkfields, London SW15 6NH, UK and Timeless Books.

CBS&GNHR (2016). A Compass Towards a Just and Harmonious Society - 2015 GNH Survey Report. Centre for Bhutan Studies and GNH Research, Royal Government of Bhutan, Thimphu. [Accessed from http://www.grossnationalhappiness.com/wp-content/uploads/2017/01/Final-GNH-Report-jp-21.3.17-ilovepdf-compressed.pdf on 9-10-2021].

ILO (2008). International Standard Classification of Occupations ISCO-08, Volume 1 – Structure, group definitions and correspondence tables. International Labour Office, Geneva. [Accessed from https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_172572.pdf on 31-10-2021]

Ison, Barry (1997). The Thirteen Traditional Crafts. In *BHUTAN – Mountain Fortress of the Gods*, by Francoise Pommaret and Christian Schicklgruber (Editors, 1997) Copyright of Museum für Völkerkunde, Vienna. Published by Bookwise (India) Pvt Ltd, Fine Books from East and West, New Delhi – 110 001 – India. ISBN 0 906026 44 x. (pp.101-131).

MoE (2020). Annual Education Statistics. Ministry of Education, Royal Government of Bhutan, Thimphu. [Accessed from http://www.education.gov.bt/wp-content/uploads/2021/09/AES-2020-Final.pdf on 4-2-2022]

MoEA (2011). The Economic Contribution of Core Copyright Industries in Bhutan. Intellectual Property Division, Ministry of Economic Affairs, Royal Government of Bhutan, Thimphu. [Access from https://tind.wipo.int/record/28204?ln=en on 31-10-2021]

MoF (2005). Bhutan Trade Statistics 2005. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2014/08/bts2005.pdf on 4-11-2021].

MoF (2010). Bhutan Trade Statistics 2010. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2014/08/bts2010.pdf on 4-11-2021].

MoF (2015). Bhutan Trade Statistics 2015. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2014/08/BTS_2015.pdf on 2-11-2021]

MoF (2016). Bhutan Trade Statistics 2016. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2017/03/BTS2016.pdf on 2-11-2021]

MoF (2017). Bhutan Trade Statistics 2017. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2018/04/Final-BTS-Publication-2017.pdf 2-11-2-21]

MoF (2018). Bhutan Trade Statistics 2018. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2019/05/BhutanTradeStatistics2018.pdf on 2-11-2-21]

MoF (2019). Bhutan Trade Statistics 2019. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2020/03/BhutanTradeStatistics2019260320201.pdf on 2-11-2-21]

MoF (2020). Bhutan Trade Statistics 2020. Department of Revenue and Customs, Ministry of Finance, Royal Government of Bhutan, Thimphu. [Accessed from https://www.mof.gov.bt/wp-content/uploads/2021/05/BhutanTradeStatistic2020_Publication.pdf on 2-11-2-21]

MoHCA (2009). *Bhutan Cultural Industries Sector Development – A Baseline Report 2009.* Department of Culture, Ministry of Home and Cultural Affairs and National Statistics Bureau, Royal Government of Bhutan, Thimphu.

MoHCA& NSB (2013). *The Bhutanese Weaver Survey 2010 – The Report 2013.* Department of Culture, Ministry of Home and Cultural Affairs and National Statistics Bureau, Royal Government of Bhutan, Thimphu.

MoLHR (2021). *TVET Quality Assurance Management Information System.* Department of Occupational Standards, Ministry of Labour and Human Resources, Royal Government of Bhutan, Thimphu. [Accessed from http://202.144.155.104/registeredlist/institute on 23-2-2022]

Myers, Diana K and Bean, Susan S (Editors, 1994). From the Land of the Thunder Dragon – Textile Arts of Bhutan. Copyright of Peabody Essex Museum. ISBN 0 906026 31 8. Published by Serindia Publications, 10 Parkfields, London SW15 6NH, UK and Timeless Books.

Myers, Diana K and Pommaret, Francoise (1994). The Fabric of Life in Bhutan. In *From the Land of the Thunder Dragon – Textile Arts of Bhutan*. Copyright of Peabody Essex Museum. ISBN 0 906026 31 8. Published by Serindia Publications, 10 Parkfields, London SW15 6NH, UK and Timeless Books.

NSB (2003). Bhutan Living Standards Survey 2003 Report. National Statistics Bureau, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/bhutan-living-standard-survey-report/ on 31-10-2021]

NSB (2007). Bhutan Living Standards Survey 2007 Report. National Statistics Bureau, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/bhutan-living-standard-survey-report/ on 31-10-2021]

NSB (2012). Bhutan Living Standards Survey 2012 Report. National Statistics Bureau, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/bhutan-living-standard-survey-report/ on 31-10-2021]

NSB (2017). Bhutan Living Standards Survey 2017 Report. National Statistics Bureau, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/bhutan-living-standard-survey-report/ on 31-10-2021]

NSB (2018). 2018 Labour Force Survey Report Bhutan. National Statistics Bureau, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/labour-force-survey-report/ on 31-10-2021]

NSB (2018). Population and Housing Census of Bhutan 2017. National Statistics Bureau of Bhutan, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/census-report/ on 11-11-2021]

NSB (2019). 2019 Labour Force Survey Report Bhutan. National Statistics Bureau, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/labour-force-survey-report/ on 31-10-2021]

NSB (2020). 2020 Labour Force Survey Report Bhutan. National Statistics Bureau, Royal Government of Bhutan, Thimphu. [Accessed from https://www.nsb.gov.bt/publications/labour-force-survey-report/ on 31-10-2021]

NSB & WB (2017). Bhutan Poverty Analysis Report 2017. National Statistical Bureau, Royal Government of Bhutan, Thimphu and the World Bank, DC. [Accessed from https://www.nsb.gov.bt/publications/poverty-analysis-report/ on 5-02-2022]

Padilha, Carolina Klein and Gomes, Giancarlo (2016). Innovation culture and performance in innovation of products and processes: a study in companies of textile industry. In *RAI Revista de Administração e Inovação 13 (2016) 285–294.* Received 17 December 2015; accepted 23 July 2016. Available online 8 September 2016. [Carolina Klein Padilha, *Universidade Federal de Santa Catarina (UFSC), Administrac ão, Florianópolis, SC, Brazil* and Giancarlo Gomes, *Fundac ãoUniversidade Regional de Blumenau (FURB), CiênciasContábeis e Administrac ão, Blumenau, SC, Brazil*].

RGoB (2019). *TVET Curriculum Framework*. Office of the Prime Minister, Royal Government of Bhutan, Thimphu. November 2019.

RTA (2022). *National Textile Purchase and Consumption Survey 2021*. Royal Textile Academy, Thimphu. March 2022.

RTA (2022). *Youth Attitudinal Survey on Weaving, Bhutanese Weaving Culture and Designing 2021*. Royal Textile Academy, Thimphu. February 2022.

Tashi, Khenpo Phuntsho (2019). Art of Textile. In *Arts and Culture of Bhutan – Reflections on Bhutanese Cultural Wisdom Over Time*. ISBN – 978-99936-935-8-1; BICMA No. 100000653; First Edition 2019. (pp.292-295)

TCB (2014). Bhutan Tourism Monitor – Annual Report 2014. Tourism Council of Bhutan, Royal Government of Bhutan, Thimphu.

TCB (2021). Tourism Establishment Census of Bhutan 2021. Planning and Research, Tourism Council of Bhutan, Royal Government of Bhutan, Thimphu. March – April 2021 as operational in 2019.

UN (2008). International Standard Industrial Classification of All Economic Activities, Revision 4. Department of Economic and Social Affairs Statistics Division, United Nations, New York, 2008. [ST/ESA/STAT/SER.M/4/Rev.4 Statistical papers Series M No. 4/Rev.4]. [Accessed from https://unstats.un.org/unsd/publication/seriesM/seriesm_4rev4e.pdf on 3-11-2021].

UNESCO (2007). Statistics on Cultural Industries: Framework for the Elaboration of National Data Capacity Building Projects. Bangkok: UNESCO Bangkok, 2007. [Accessed from https://www.intracen.org/uploadedFiles/intracenorg/Content/About_ITC/Where_are_we_working/Multi-country_programmes/CARIFORUM/stat_clt_industries.pdf on 4-11-2021].

Yangchen, Sonam and Choden, Jigme (2015). Traditional Arts. In *Intangible Culture of Bhutan.* Edited by DashoSangayDorji, YesheyLhendup and YontenDargey.National Library of Bhutan, Department of Culture, Ministry of Home and Cultural Affairs, Royal Government of Bhutan. ISBN 978-99936-17-22-8. (pp.251-310). (In Dzongkha)

8
APPENDICES

APPENDIX A: QUESTIONNAIRE – BHUTAN TEXTILE INDUSTRY SURVEY

PART I: General Information

* Required

1. Interviewer's name * : ....

2. Respondent's contact number * : ....

3. Place of interview * : ....

4. Gender * : ....
   Mark only one oval.
   ☐ Male
   ☐ Female
   ☐ Others

5. Age * : ....

6. Educational Level Please Tick (✓) *
   Mark only one square.
   ☐ No Formal
   ☐ Education
   ☐ Primary Education (PP-VI)
   ☐ Secondary Education (VII-X)
   ☐ Higher Secondary (XI-XII)
   ☐ Vocationally Diploma College
   ☐ Basic University Degree
   ☐ Post Graduate (MA, PhD)
   ☐ Other: ....

7. Number of Persons in the Household (Please tick) *
   Mark only one square.
   ☐ Less than 5 heads
   ☐ 6-8
   ☐ 9-11
   ☐ More than 12

8. Number of Children in the Household under 18 Please Tick (✓) *
Mark only one square.
- ☐ Less than 5
- ☐ 6-8
- ☐ 9-11
- ☐ More than 12

9. Interviewee's Position in the Family (Self-declare) *
Mark only one square.
- ☐ Head of the family
- ☐ House wife/ House husband
- ☐ Daughter/ Daughter In law
- ☐ Son / Son In law
- ☐ Relatives
- ☐ Other: ....

10. Annual family Income. Please tick (✓) only ONE *
Mark only one square.
- ☐ Low Income
- ☐ Middle Income
- ☐ High Income

11. Main family income activity (Please only select ONE) *
Mark only one square.
- ☐ Weaving Farming Livestock
- ☐ Mix Farming (Farming & Livestock)
- ☐ Business (Not including crafts related activities)
- ☐ Formal/Regular employment
- ☐ Informal/Irregular employment
- ☐ Other: ....

12. Dzongkhag
Mark only one square.

☐ Bumthang	☐ Chhukha	☐ Dagana
☐ Gasa	☐ Haa	☐ Lhuentse
☐ Monggar	☐ Paro	☐ Pemagatshel
☐ Punakha	☐ Samdrup Jongkhar	☐ Samtse
☐ Sarpang	☐ Thimphu	☐ Trashigang
☐ Trashi Yangtse	☐ Trongsa	☐ Tsirang
☐ Wangdue Phodrang		☐ Zhemgang

PART II- Weaving knowledge

13. Are you a weaver? (Part-time or full time) If NO, skip to PART XVIII "Supplementarysurvey on RTA" *

    Mark only one square.

    ☐ Yes
    ☐ No

PART III- Textile practice and production types

14. Type of hand-woven textile practice and production. Please tick (ü) only ONEmajor/specialist practice

    Mark only one square.

    ☐ Yarn production and processing
    ☐ Dyeing
    ☐ Weaving
    ☐ Other:

Most frequent types of textile productsproduced in the last 5 years

(Please rank frequency from 1 – 5; 0 as not at all and 5 as most frequent)

15. a. Gho- Karchang /Plain (Mathra, Sethra, Adha Mathra, Pangtshi, Jadrima, etc)

    Mark only one square

    0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

16. b. Gho- Hor (Lungserma, Dromchuchem, Aikapur, Mentse Mathra)

    Mark only one square

    0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

17. c. Gho- Shinglochem

    Mark only one square

    0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

18. d. Kira- Karchang/ Plain (Mathra, Sethra, Adha Mathra, Pangtshi, Jadrima, Thara, etc)

    Mark only one square

    0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

19. e. Kira- Simple pattern /Jamsam
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

20. f. Kira- Intricate pattern/ dhidhim (Kishuthara, Mapsham, etc)
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

21. g. Yathra
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

22. h. Other types of traditional textile (Rachu, Kera, Kheb, etc)
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

23. i. Contemporary textiles/fabric (Examples: scarves, stoles, textiles for softfurnishing, etc.)
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

24. j. Please state type of contemporary textiles:

....

PART-IV Income

25. Percentage of household income derived from weaving in a month. Please tick the most appropriate ONE
Mark only one square.
☐ Less than 25%
☐ 26% - 50%
☐ 51% - 75%
☐ 76% - 99%
☐ 100%

PART-V Basic Weaving Practice

26. 1. What do you mainly make your textiles for? Please Tick (✓) ONE Only
    Mark only one square.
    - ☐ Self-Use/Gift
    - ☐ Sell/Exchange
    - ☐ Other:

27. 2. Who are the main people who usually help you weave? Please Tick (✓) ONE only
    Mark only one square.
    - ☐ Family
    - ☐ Cash paid workers
    - ☐ Master Artisans
    - ☐ Volunteers Friends
    - ☐ Workers paid in KindApprentices
    - ☐ Nobody helped me (Skip to question 5)
    - ☐ Other:

28. 3. What is the main reason for them to help you weave? Please Tick (✓) ONE only
    Mark only one squarel.
    - ☐ Family/Social obligation
    - ☐ To earn an income
    - ☐ Wanting in favour in exchange
    - ☐ Want to share their skills and knowledge
    - ☐ They want to learn
    - ☐ I don't know
    - ☐ Other:
29. 4a. How did you reward them? Please Tick (✓) all that applies
    Check all that apply.
    - ☐ Family/ Social acknowledgements
    - ☐ Cash payment calculated by time
    - ☐ Cash payment calculated when products are sold
    - ☐ Cash payment upon distribution of profit after sales of goods
    - ☐ Payment in kind or exchanged in favours
    - ☐ Donation to a cause
    - ☐ I Don't Know

30. 4b. Reasons for not rewarding. Tick all that applies

Check all that apply.

- ☐ No need to reward because of family/ social obligations
- ☐ Owing/Recalling a favour in return
- ☐ Cannot afford to pay
- ☐ They refused payment/rewards
- ☐ I Don't Know

31. 5. Typically, how many hours do you spend a day weaving? Please Tick (✓)

Mark only one square.

- ☐ Less than 1 Hour2 – 3 Hours
- ☐ 3 – 4 Hours
- ☐ 4 – 5 Hours
- ☐ 5 – 6 Hours
- ☐ 6 - 7 Hours
- ☐ More than 7 Hours

32. 6. Do you have any fixed time during the day when you don't weave? Please Tick(✓) If NO, skip to question 8

Mark only one square.

- ☐ Yes
- ☐ No

33. 7. What are these periods? Please Tick (✓) All that applies

Check all that apply.

- ☐ Preparation for meals
- ☐ Meal times
- ☐ Prayer times
- ☐ Time with the familyRest time
- ☐ Other:..

34. 8. a. Reviewing the range of textiles which you had made in the past 5 years, pleasename 1 product that takes the shortest time to weave.

....

35. 8.b. How many days did it take you to weave?

Mark only one square.

- ☐ Within a day
- ☐ Within 3 days
- ☐ Within a week
- ☐ Within two weeks
- ☐ Within a month

36. 9.a. Reviewing the range of textiles which you had made in the past 5 years, pleasename 1 product that takes the longest time to weave.

....

37. 9.b. How many months did it take you to weave?

Mark only one square.

- ☐ Within a month
- ☐ Within 3 months
- ☐ Within 6 months
- ☐ Within a year
- ☐ More than a year

PART VI- Production – Capital

38. 1. What is the main source of money to finance the production of your textiles?Please Tick (✓) ONE only

Mark only one square.

- ☐ Income from sales of textiles
- ☐ Savings
- ☐ Formal/Official loans
- ☐ Informal/Unofficial loans
- ☐ Money collected from family and friends
- ☐ Government investment
- ☐ Wages from other work
- ☐ NGOs/ Foundations/Institutions/Aid Agencies
- ☐ No need for capital because I am a paid/salaried artisan
- ☐ No need for capital because I only weave upon order and the person who orders from my provide me the necessary materials to work and/or pays for the materials in advance

PART VII- Production – Raw Materials

(For weavers, please rank the frequency of the fibre type you have been using as based-material in the past 12 months (1 as least frequent and 5 as most frequent),

A. Bhutan

For weavers, please rank the frequency of the fibre type you have been using as based-material in the past 12 months (0 as not at all and 5 as most frequent),

39. Cotton

Mark only one square

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

40. Sheep Wool

Mark only one square

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

41. Yak Wool

Mark only one square

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

42. Nettle

Mark only one square

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

43. Others, please state

....

B. Imported

For weavers, please rank the frequency of the fibre type you have been using as based-material in the past 12 months (0 as not all and 5 as most frequent),

44. Cotton (Industrial produced)

Mark only one square

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

45. Mercerised cotton (Khaling cotton)

Mark only one square.

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

46. Cotton (hand produced)

Mark only one square

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

47. Poly-cotton (Teri-cotton)
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

48. Reeled or Filament silk (Seshu)
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

49. Spun Silk (Bura)
Mark only one square.
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

50. Wool
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

51. Acrylic
Mark only one square
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

52. Others, please state

....

2. How satisfied are you with the quality of this material? Please Tick (✓)

A. Bhutan

53. Cotton
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

54. Sheep Wool
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied
- ☐ Extremely satisfied

55. Yak Wool
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

56. Nettle
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

B. Imported

57. Cotton (Industrial produced)
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

58. Mercerised cotton (Khaling cotton)
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

59. Cotton (hand produced)
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfiedd

60. Poly-cotton (Teri-cotton)
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

61. Reeled or Filament silk (Seshu)
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

62. Spun Silk (Bura)
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

63. Wool
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

64. Acrylic
Mark only one square.
- ☐ Extremely unsatisfied
- ☐ Unsatisfied
- ☐ Satisfied Extremely
- ☐ Satisfied

How do you feel about the current cost of this material? Please Tick (✓)

A. Bhutan

65. Cotton

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensive

66. Sheep Wool

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensive

67. Yak Wool

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensive

68. Nettle

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensive

B. Imported

69. Cotton (Industrial produced)

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensive

70. Mercerised cotton (Khaling cotton)

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensive

71. Cotton (hand produced)

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensive

72. Poly-cotton (Teri-cotton)

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensivee

73. Reeled or Filament silk (Seshu)

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensivee

74. Spun Silk (Bura)

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensivee

75. Wool

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensivee

76. Acrylic

Mark only one square.

- ☐ Extremely Cheap
- ☐ Cheap Reasonable
- ☐ Expensive
- ☐ Extremely Expensivee

4. What do you think about the value (in terms of cost and quality relationship) of this material? Please Tick (✓)

A. Bhutan

77. Cotton

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeable

78. Sheep Wool

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeable

79. Yak Wool

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeable

80. Nettle

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeable

B. Imported

81. Cotton (Industrial produced)

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeablee

82. Mercerised cotton (Khaling cotton)

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeable

83. Cotton (hand produced)

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeable

84. Poly-cotton (Teri-cotton)

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeabl

85. Reeled or Filament silk (Seshu)

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeabl

86. Spun Silk (Bura)

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeabl

87. Wool

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeabl

88. Acrylic

Mark only one square.

- ☐ Extremely Unagreeable
- ☐ Unagreeable
- ☐ Agreeable
- ☐ Extremely Agreeabl

5. Is it difficult for you to access this material? Please Tick (✓)

A. Bhutan

89. Cotton

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

90. Yak Wool

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

91. Sheep Wool

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

92. Nettle

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

B. Imported

93. Cotton (Industrial produced)

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

94. Mercerised cotton (Khaling cotton)

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

95. Cotton (hand produced)

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

96. Poly-cotton (Teri-cotton)

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

97. Reeled or Filament silk (Seshu)

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

98. Spun Silk (Bura)

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

99. Wool

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

100. Acrylic

Mark only one square.

- ☐ Extremely inaccessible
- ☐ Inaccessible
- ☐ Accessible
- ☐ Extremely accessible

101. 6. Do you have any other views of the main raw materials that you are using,please?

....

....

PART VIII-Production – Costings

102. 1. Do you know the final selling price of your textiles? Please Tick (✓)

Mark only one square.

- ☐ Yes
- ☐ No

103. 2. If YES, do you calculate the selling price of your textiles? Please Tick (✓)

Mark only one square.

- ☐ Yes
- ☐ No

104. 3. If 'NO', do anyone else calculate the selling price of your textiles? Please Tick(✓)

Mark only one square.

- ☐ Yes
- ☐ No

105. 4. If 'YES', who are they? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Family members
- ☐ Friends
- ☐ Middle men
- ☐ Shop keepers who sells my products
- ☐ The person who orders the products from meThe person who pays my wages
- ☐ Other:

106.5. Do you know how to calculate the selling price of your textiles? Please Tick (✓)

Mark only one square.

- ☐ Yes
- ☐ No
- ☐ Not Sure

107. 6. What is the most common product you wove in the past 5 years? Using this asa reference, please answer the following questions? (Q6a – 6d)

....

108. 6a. Do you know what most affects the selling price of your textiles in the past 5years? Please Tick (ü) One Only

Mark only one square.

- ☐ Raw materials
- ☐ Labour
- ☐ Transportation
- ☐ Design
- ☐ Mark-up/Profit
- ☐ Demand
- ☐ Other: ....

109. 6b (1). Are you happy with your most recent selling price of your textiles? If YESPlease Tick (✓) All That Applies

Check all that apply.

- ☐ Close to market price
- ☐ Easy to sell and fast turn over
- ☐ Good profit
- ☐ Price and quality is acceptable by the marketI don't know
- ☐ Other: ....

110. 6b (2). Are you happy with the most recent selling price of your textiles? If NO,Please Tick (✓) All That Applies

Check all that apply.

- ☐ Cost of production higher than selling price
- ☐ I don't know
- ☐ Other: ....

111. 6c. How does your price of this textile compare with that of other similar textilesfor sale on the market in the past 5 years? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Too HighHigh
- ☐ Almost the sameLow
- ☐ Too Low
- ☐ I don't know

112.6d. In the last 5 years, on the average, do you think that the prices of your textilehave increased or decreased or remained the same? Please Tick (ü) ONE Only

Mark only one square.

- ☐ Increased
- ☐ Decreased
- ☐ Remained the same
- ☐ I don't know

PART IX- Business Operations

113.1.Where do you weave most of your products? Please Tick (✓) One Only

Mark only one square.

- ☐ Home
- ☐ At the workshop, association/organisation's venue or where the person pays my wages
- ☐ Shop/market
- ☐ Other fixed place
- ☐ Other: ....

114. 2. In the past 12 months, how many months did you weave? Please Tick (✓)

Mark only one square.

- ☐ 1 month
- ☐ 3 months
- ☐ 6 months
- ☐ 9 months
- ☐ 12 months

115. 3. Which are the months that you did not weave at all? (Please tick the monthsthere were close for business)

Check all that apply.

- ☐ January
- ☐ February
- ☐ March
- ☐ April
- ☐ May
- ☐ June
- ☐ July
- ☐ August
- ☐ September
- ☐ October
- ☐ November
- ☐ December

116. 4. What are the reasons for not weaving?

Check all that apply.

- ☐ Time with family
- ☐ Unavailability of raw materials
- ☐ Farming seasons
- ☐ Pilgrimage / Festivals
- ☐ Other: ....

PART X- Production – Merchandizing

117. 1. Who decides what and how much to weave? Please Tick (✓) ONE Only

- ☐ Mark only one square.
- ☐ Yourself
- ☐ Family members
- ☐ Friends
- ☐ Middle men Shop keepers
- ☐ Persons who orders from you
- ☐ Persons who pays my wages
- ☐ Government officials
- ☐ NGOs/ Foundations/Institutions/Aid Agencies Other:

118. 2. How did you or the person who was involved in the decision know what and how much to weave? Please Tick (✓) ONE Only

- ☐ Mark only one square.
- ☐ From past years' experience and records
- ☐ From customers' orders
- ☐ From following trends
- ☐ From government advice
- ☐ From market knowledge
- ☐ From looking at other producers
- ☐ From advise from family & friends
- ☐ I don't know
- ☐ Other: ....

PART XI- Production – Advertising and Promotions

119. 1. In your opinion, which is the most popular means of people knowing that youare weaving and selling your textiles? Please Tick (✓) ONE Only

Mark only one square.

- ☐ I promote the textiles myself by selling them myself
- ☐ I have a good reputation of making these textiles
- ☐ These textiles are traditionally sold in the area
- ☐ By word of mouth
- ☐ Family and friends help to promote my textiles
- ☐ Through social media by unknown persons
- ☐ Advertisement in media (TV, newspapers, magazines, etc)
- ☐ I don't know
- ☐ I don't need to advertise because I work for wages
- ☐ Other: ....

PART XI- Purchaser Profile

120. 1. Do you know who are your main purchasers? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Yes
- ☐ No
- ☐ Maybe

121. 2. If 'yes', who are they? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Bhutanese
- ☐ Non- Bhutanese

3. For Bhutanese purchasers, please respond to the following questions:

122. 3a. Who are your main customers? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Other households or individuals
- ☐ Small enterprises
- ☐ Large enterprises
- ☐ Government or other public firms
- ☐ Local retail traders
- ☐ Exporters Contractor
- ☐ NGO or international organization
- ☐ Other:

123. 3b. Do you know where they are from? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Same Geweog
- ☐ Same Dzongkhag
- ☐ Same Region (East, West, Central and South)
- ☐ All over Bhutan (except Thimphu)
- ☐ Thimphu
- ☐ Other: ....

3c. For individual Bhutanese purchasers, please respond to the following questions:

124. 3ci. Which gender purchase your products the most? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Female
- ☐ Male
- ☐ Male and Female in equal Proportion

125. 3cii. What is their age range? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Below 20

- ☐ 21 - 29
- ☐ 30 - 39
- ☐ 40 - 49
- ☐ 50 - 59
- ☐ Above 60

126. 3c iii. Do you know where they are from? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Same Gewog
- ☐ Same Dzongkhag
- ☐ Same Region (East, West, Central and South)
- ☐ All over Bhutan (except Thimphu)
- ☐ Thimphu

4. For Non-Bhutanese purchaser

127. 4a. What is their gender? Please Tick (✓) ONE Only

- ☐ Mark only one square.
- ☐ Male Female
- ☐ Male and Female in Equal Proportion

128. 4b. What is their age range? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Below 20
- ☐ 21 - 29
- ☐ 30 - 39
- ☐ 40 - 49
- ☐ 50 - 59
- ☐ Above 60

129. 4c. Do you know which country do they come from? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Yes
- ☐ No

130. 4d. If 'yes' where do the majority of your non-Bhutanese purchasers come from?Please Tick (✓) ONE Only

Mark only one square.

- ☐ Regional (SAARC Countries)
- ☐ International

131. 4e. In the 5 years, on an average, how much did they buy within a singlepurchase? (To quote in Bhutanese Ngultrums)

....

4f. From a scale of 0– Not popular to 5 – most popular, can you rate the following products in terms popularity amongst your non-Bhutanese purchasers? Please Tick(✓) all there are relevant

132. Traditional Kira textiles
Mark only one square.
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

133. Traditional Gho textiles
Mark only one square.
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

134. Other traditional textiles (rachu, kera, etc.)
Mark only one square.
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

135. Yatha textiles
Mark only one square.
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

136. Contemporary scarves and shawls
Mark only one square.
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

137. Soft furnishings (eg. Placemats, table runners, etc.)
Mark only one square.
0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

PART XII-Production – Marketing and Sales

138. 1. Where do you sell your textiles? Please Tick (✓) ONE Only
Mark only one square.
☐ At home Local market

- ☐ All over Bhutan
- ☐ Neighbouring countries (India, Nepal and Bangladesh)
- ☐ Other:

139. 2. Where are your most frequent customers based in? Please Tick (✓)

Mark only one square.

- ☐ Same Gewog Same Dzongkhag
- ☐ Same Region (East, West, Central and South)
- ☐ All over Bhutan (except Thimphu)
- ☐ Thimphu
- ☐ Other: ________

140. 3. How do you mainly sell your textiles? Please Tick (✓) all that applies

Check all that apply.

- ☐ Sell it myself directly to customers
- ☐ Through a 3rd party – middle person, family, friends, etc.
- ☐ On consignment to a shop
- ☐ Direct sale to a shop
- ☐ I exchange my labour for wages
- ☐ Made-to-Order and delivered to customersOnline shops
- ☐ Temporary marketing events such as Tsechus, local festivals, trade fairs and craftsfestivals
- ☐ Other: ....

141. 4a. Do you have any difficulties in selling your products? If Yes, why? Please tick(✓) all that applies

Check all that apply.

- ☐ Lack of transportation
- ☐ Lack of manpower to sell
- ☐ Market access difficult
- ☐ Over-supply and low price
- ☐ Do not trust middlemen
- ☐ Products do not fit with the market
- ☐ Customers cannot afford
- ☐ I don’t know
- ☐ Other: ....

142. 4b. Do you have any difficulties in selling your products? If NO, why? Please tick(✓) all that applies

Check all that apply.

☐ Products are suitable for target markets
☐ Good transportation
☐ Good demand
☐ Trust worthy middlemen
☐ Supported by Government or other authorities
☐ I don't know
☐ Other: ....

143. 5. Do you know what is your best-selling product in the last 5 years? Please Tick(✓) ONE Only

Mark only one Square.

☐ Yes
☐ No
☐ Not Sure

6.If 'yes', what is your best-selling product?

144. 6a. Name of product

....

145. 6b. Selling Price of Product

....

146. 6c. Quantity Sold within a year

....

147. 7. Do you know what is your worst selling product in the last 5 years? Please Tick(✓) ONE Only

Mark only one square.

☐ Yes
☐ No
☐ Not Sure

8. If 'YES', what is your worst-selling product?

....

148. 8a. Name of product

....

149. 8b. Selling Price of Product

....

150. 8c. Quantity Sold per month

....

151. 9. What do you think are the reasons that this product did not sell well? Pleasetick (✓) all that are relevant

Check all that apply.

- ☐ Too expensive
- ☐ Wrong size
- ☐ Colour combination not attractive
- ☐ Poor weaving quality
- ☐ Poor finishingOther:

10. On the annual average, can you please recall the total quantity you produced within the past 5 years? (With reference to most frequent types of textile produced inthe last 5 years)

152. 2016

....

153. 2017

....

154. 2018

....

155.2019

....

156.2020

....

11. On the annual average, can you recall your income from sales of your textiles within the past 5 years? (With reference to most frequent types of textile produced in the last 5 years)

157.2016

....

158.2017

………

159.2018

………

160.2019

………

161.2020

………

162. 12. Do you think that the sales of your products have changed in the past 5 years?Please Tick (✓) One Only

Mark only one square.

- ☐ Increased Markets
- ☐ Decline
- ☐ No change

163. 13. If YES, over what period of time have you seen this change? Please Tick (✓)ONE Only

Mark only one square.

- ☐ Last 0 – 1Years
- ☐ Last 1 – 2 Years
- ☐ Last 3 – 4 Years
- ☐ Last 5 Years

PART XIII-Production – Payment Procedure

1. Do you have problems paying suppliers/workers/creditors? Why? Please Tick (✓) AllThat Applies

164. If YES,

Check all that apply.

- ☐ No cash in hand
- ☐ No access to financial resources
- ☐ Lack of sales
- ☐ Sales with poor profit
- ☐ Problems in sales turnover/cash flow
- ☐ Lack of credit
- ☐ I don't know
- ☐ Other:

165. If NO,
Check all that apply.
- ☐ Cash readily available in hand
- ☐ Easy access to cash/savings
- ☐ Good sales with good profit
- ☐ Prompt payments from customers
- ☐ Easy access to loans with low/no interest
- ☐ Exchange with labour or materials as payments
- ☐ I don't know
- ☐ Other: ....

2. Do you have problems collecting payments from customers? Why? Please Tick (✓) All That Applies

166. If YES
Check all that apply.
- ☐ Customers short of cash
- ☐ Payments not immediate /payment terms not favourable
- ☐ Difficult to locate middlemen to obtain payments
- ☐ Difficult to collect payments from family/friends
- ☐ Payments not in cash
- ☐ I don't know
- ☐ Other: ....

167. If NO,
Check all that apply.
- ☐ Customers always pay in cash
- ☐ Payments immediate / payment terms favourable
- ☐ Middle men trust worthy and payment is punctual
- ☐ Cash terms only
- ☐ I don't know
- ☐ Other: ....

168. 3. Do you provide credit terms to your customers? Please Tick (✓) ONE only
Mark only one square.
- ☐ Always
- ☐ Definitely not
- ☐ It depends

169. 4. If 'YES', what are the terms? Please Tick (ü) One Only

Check all that apply.

- [ ] Within a week Within a month
- [ ] Within 3 months
- [ ] Within 6 months
- [ ] Within a year
- [ ] No fixed term

5. For those who are commissioned to weave, which is the most common practice:

170. 5a. When you are commissioned to weave a piece of textiles do you: Please Tick(✓) ONE Only

Mark only one square.

- [ ] Obtain no deposits from your customers.
- [ ] Customers pay/transfer to you the cash to purchase all the yarns for the textile only.
- [ ] Customers pay/transfer to you the cash to purchase all the yarns and part of thelabour cost for the textile.
- [ ] Customer pay/transfer to you the cash to purchase all the yarns and all the labourcost for the textiles.
- [ ] Other: ....

171. 5b. When you complete the commissioned textiles, do you: Please Tick (✓) ONEonly

Mark only one square.

- [ ] Obtain the full payment for yarns and labour
- [ ] Customers pay/transfer to you the cash for all or part of the labour and some of theyarns as the initial purchase of the yarns were not sufficient to complete the commissioned textiles.
- [ ] Customers pay/transfer to you the cash for all or part of the labour as the yarns werealready paid and the quantities were sufficient to complete the commissioned textiles.
- [ ] Customer do not pay/transfer to you any cash as everything was paid up-front.
- [ ] Other: ....

172. 6. How do you usually get paid? Means of payment. Please Tick (✓) ONE Only

Mark only one square.

- [ ] Cash terms
- [ ] Through cheque, money transfersUsing on-line app-based transfers
- [ ] Exchange with materials (grain, food, livestock, etc…)Exchange with labour
- [ ] Other: ....

173. 7. How is the income/profit generated usually used? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Household expensesSavings
- ☐ Education
- ☐ Plough back into existing weaving practicesInvestment into other areas
- ☐ I don't know where the money goes
- ☐ Other: ....

174. 8. Who makes the decision on the usage of the income? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Self Spouse Parents
- ☐ Siblings Relatives
- ☐ Business partner
- ☐ Other: ....

175. 9. Are you happy with this decision making? Please Tick (✓) ONE Only

Mark only one squarel.

- ☐ Yes
- ☐ No
- ☐ I rather not say

176. 10. If 'NO', why?

....

PART XIV- Production – Packing for Delivery

177. 1. Do you sell your products far away from where you make the products? PleaseTick (✓) ONE Only

Mark only one square.

- ☐ Yes
- ☐ No

178. 2. Is it difficult for you to deliver your products to other regions?

Mark only one square.

- ☐ Yes
- ☐ No

179. If YES, please Tick (✓) All That Applies

Check all that apply.

- ☐ Lack of transportation (vehicles)
- ☐ Lack of roads
- ☐ Lack of labour Lack of knowledge
- ☐ High cost
- ☐ I don't know
- ☐ Other: ....

180. 3. Do you pack your products for delivery? Please Tick (✓)

Mark only one square.

- ☐ Yes
- ☐ No
- ☐ Sometimes

181. 4. If 'YES', how?

....

182. 5. Are there any current problems with packing? What are the problems?

Mark only one square.

- ☐ Yes
- ☐ No

183. If YES, Please Tick (✓) All That Applies

Check all that apply.

- ☐ No experience
- ☐ Lack of packing materials High cost of packing materials
- ☐ Lack of labour
- ☐ I don't know
- ☐ Other: ....

PART XV- Skills and Education

184. 1. Whom did you learn the skills from? Please Tick (✓) ONE Only

Mark only one square.

- ☐ Handed down from own ancestors
- ☐ Other family members

- ☐ Friends or neighbours
- ☐ Self-taught
- ☐ Master weaver
- ☐ Government training courses / vocational schools
- ☐ Other: ....

185. 2. At what age did you start weaving? Please Tick (✓)

Mark only one square.

Below 12

- ☐ 13 - 20
- ☐ 21 - 30
- ☐ 31 – 40
- ☐ 41 - 50
- ☐ Above 50

3. Do you hope to pass your skills to others? Why? Please Tick (✓) All That Applies

186. If YES,

Check all that apply.

- ☐ To carry on family tradition
- ☐ To continue traditional handicraft in the community
- ☐ To help promote this craft
- ☐ Help others
- ☐ To improve economic conditions of the family/ communityGovernment / community leaders' encourage
- ☐ I don't know
- ☐ Other: ....

187. If NO

Check all that apply.

- ☐ Low prestige
- ☐ Nobody is interested to learn
- ☐ Does not generate enough money
- ☐ Does not help improve economic conditions of the family/community
- ☐ Government / community leaders' do not encourage
- ☐ I don't know
- ☐ Other: ....

188. 4. Who will you pass this skills to? Please Tick (✓) All That Applies

Check all that apply.

- ☐ Family (next generation)
- ☐ Community
- ☐ Friends
- ☐ Anyone who is interested
- ☐ Other: ....

5a. What skills would you like to improve on and please list the priority for each?Please Tick (✓) All That Applies; (1 – Very Urgent, 2 – Urgent, 3 – Not urgent)

A. General Skills

189. General literacy

Mark only one square.

1 ☐ 2 ☐ 3 ☐

190. General numeracy

Mark only one square.

1 ☐ 2 ☐ 3 ☐

191. Personal Hygiene

Mark only one square.

1 ☐ 2 ☐ 3 ☐

B. Textile Designing and Technical Skills

192. Contemporary Textile Weave Design

Mark only one square.

1 ☐ 2 ☐ 3 ☐

193. Traditional Textile Weave Design

Mark only one square.

1 ☐ 2 ☐ 3 ☐

194. Colour Combinations

Mark only one square.

1 ☐ 2 ☐ 3 ☐

195. Fibre Knowledge

Mark only one square.

1 ☐ 2 ☐ 3 ☐

196. Yarn Spinning and Plying

Mark only one square.

1 ☐ 2 ☐ 3 ☐

197. Natural Dyeing Techniques

Mark only one square.

1 ☐ 2 ☐ 3 ☐

198. Upgrade existing weaving and textile production skills (On backstrap looms)

Mark only one square.

1 ☐ 2 ☐ 3 ☐

199. New weaving techniques and textile production skills (on horizon framelooms/meche loom)

Mark only one square.

1 ☐ 2 ☐ 3 ☐

200. Textile Finishing Techniques

Mark only one square.

1 ☐ 2 ☐ 3 ☐

C. Business Skills

201. Basic Finance, Accounting and Budgeting

Mark only one square.

1 ☐ 2 ☐ 3 ☐

202. Inventory, Sales and Marketing (including digital marketing)

Mark only one square.

1 ☐ 2 ☐ 3 ☐

203. Production Planning and Time Management

Mark only one square.

1 ☐ 2 ☐ 3 ☐

204. 6. How would you like to improve on your weaving skills? Please Tick (ü) All ThatApplies

Check all that apply.

- ☐ Learn from others
- ☐ Practice more
- ☐ Take part in training courses Learn more from master weaver
- ☐ More exposure
- ☐ Other: ....

7. What are your preferences for the trainings? (Please rank all in terms ofpreferences: 1 for most preferred; 3 for least preferred)

205. Frequent short-term training within a week at your locality

Mark only one square.

1 ☐ 2 ☐ 3 ☐

206. Frequent short-term training within a week at regional/centralized at RTA

Mark only one square.

1 ☐ 2 ☐ 3 ☐

207. Frequent mid-term duration training of maximum of 1 month at your locality

Mark only one square.

1 ☐ 2 ☐ 3 ☐

208. Frequent mid-term duration training of maximum 1 month at a regional/centralized at RTA

Mark only one square.

1 ☐ 2 ☐ 3 ☐

209. Long-term training up to 1 – 3 months at regional/centralized at RTA

Mark only one square.

1 ☐ 2 ☐ 3 ☐

210. 6 months – 1year at a centralized at RTA

Mark only one square.

1 ☐ 2 ☐ 3 ☐

211. 8. Within the year, which are your preferred months for training? Please Tick (ü) all that is applicable

Check all that apply.

☐ January	☐ February	☐ March	☐ April
☐ May	☐ June	☐ July	☐ August
☐ September	☐ October	☐ November	☐ December

9. Would you like weaving skills to be certified? Why? Please Tick (ü) all that isapplicable

212. If YES

Check all that apply.

- ☐ It officially validates my skills against a national certified system
- ☐ It makes it easier to quote an standard acceptable rate when
- ☐ I am commissioned with a piece of weaving work
- ☐ It gives me recognition amongst my family and community It gives me a sense of value
- ☐ It is prestigious
- ☐ It provides me with an indication of where I am as a weaving in Bhutan It indicates to me which particular skills I need to further improve upon Facilitates opportunities for employment
- ☐ I don't know
- ☐ Other: ....

213. If NO,

Check all that apply.

- ☐ Not interested to have my skills officially validated
- ☐ Having my skills certified will work against me when I give a quote when commissioningwith a piece of weaving work
- ☐ Because people already know the standard of my weaving skills I don't need an officially certified system to validate my skills
- ☐ It is not prestigious
- ☐ I already know where I stand as a weaver in Bhutan
- ☐ I don't need to a system to indicate where I can further improve my weaving skills
- ☐ Does not facilitate opportunities for employment
- ☐ I don't know
- ☐ Other: ....

10. Training Cost

214. a. Do you think it is reasonable to charge a fee for any of the above trainings that you are interested in?

Mark only one square.

- ☐ Yes
- ☐ No

215. b. If 'yes', are you willing to contribute to the cost for the above trainings?

Mark only one squarel.

- ☐ Yes
- ☐ No

11. Language Proficiency

a.Dzongkha Please Tick (✓)

216. Speak
Mark only one squarel.
- ☐ Unable
- ☐ A little
- ☐ Average
- ☐ Good
- ☐ Excellent

217. Write
Mark only one square.
- ☐ Unable
- ☐ A little
- ☐ Average
- ☐ Good
- ☐ Excellentt

218. Read
Mark only one square.
- ☐ Unable
- ☐ A little
- ☐ Average
- ☐ Good
- ☐ Excellentt

b. English Please Tick (ü)

219. Speak
Mark only one square.
- ☐ Unable
- ☐ A little
- ☐ Average
- ☐ Good
- ☐ Excellent

220. Write
Mark only one square.
- ☐ Unable
- ☐ A little
- ☐ Average
- ☐ Good
- ☐ Excellent

221. Read
Mark only one square.
- ☐ Unable
- ☐ A little
- ☐ Average
- ☐ Good
- ☐ Excellent

222. 12. Numeracy Skills Please Tick (ü)
Mark only one square.
- ☐ Unable
- ☐ A little
- ☐ Average
- ☐ Good
- ☐ Excellent

PART XVI-Design and Technology

223. 1. Most of the time, where did you get the idea to make these products?
Mark only one square.
- ☐ Traditional products, designs and style
My own creations
- ☐ Copying from others and other products
- ☐ Suggestions from family and friends
- ☐ Suggestions from customers and orders
From master artisans
- ☐ From the media (TV, magazines, newspapers, etc.)
- ☐ From visits to other places
- ☐ Directed from customers and orders
- ☐ Other: ....

224. 2. What is the level of your interest in creating your own textile design? (0 – No Interest, 5 – Extremely Interested) Please Tick (✓) One Only

Mark only one square.

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐

225. 3. In your opinion, what do you think are top three most serious technical problems in your weaving process and suggest some solutions towards resolving these problems, if possible

....

226. 4. What do you think of the quality of your textiles comparing with those on themarket? Please Tick (ü)

Check all that apply.

☐ Better
☐ Comparable
☐ Poor

PART XVII-Social Capital and Happiness

1. Of all your textiles, which is the one best represents its community/region? Why?

227. 1a. Name of Textile

....

228. 1b. The region from where the textile originates from

....

229. 1c. Reason

....

2. Do you like weaving/working on your textiles/textile products? Why? Please Tick (✓) All That Applies

230. If YES,

Check all that apply.

- ☐ To continue family tradition
- ☐ Proud of my culture
- ☐ People interested in the products
- ☐ High prestige
- ☐ Help others
- ☐ Enhance income and improve living conditions
- ☐ Have a good market demand
- ☐ Easy to produce
- ☐ Easy access to raw materials
- ☐ Interested in making
- ☐ Self-fulfilment
- ☐ I don't know
- ☐ Other: ....

231. If NO,

Check all that apply.

- ☐ Not interested to continue traditions
- ☐ Not proud of my culture
- ☐ People now not interested in these products
- ☐ Low prestige
- ☐ Too much trouble
- ☐ Unable to generate income or improve living conditions
- ☐ No market demand
- ☐ Too complex and complicated to produce
- ☐ Unable to obtain raw materials
- ☐ Not interesting
- ☐ Not self-fulfilling
- ☐ Other: ....

232. 3. How much of the time do you find weaving/working on your textiles/textile products interesting? Please Tick (ü)

Mark only one square.

- ☐ None or nearly one of the time
- ☐ Some of the time
- ☐ Most of the time
- ☐ All, or nearly all of the time

233. 4. How much of the time do you find weaving/working on your textiles/textile products rewarding? Please Tick (✓)

Mark only one square.

☐ None or nearly one of the time

☐ Some of the time

☐ Most of the time

☐ All, or nearly all of the time

234. 5. How much of the time do you find weaving/working on your textiles/textileproducts difficult? Please Tick (✓)

Mark only one square.

☐ None or nearly one of the time

☐ Some of the time

☐ Most of the time

☐ All, or nearly all of the time

235. 6. How much of the time do you find weaving/working on your textiles/textile products enjoyable? Please Tick (✓)

Mark only one square.

☐ None or nearly one of the time

☐ Some of the time

☐ Most of the time

☐ All, or nearly all of the time

236. 7.As a weaver, would you say you are?

Mark only one square.

☐ Very happy

☐ Happy

☐ A little happy

☐ Very unhappy

237. 8. Other comments

....

PART XVIII-Supplementary Survey on RTA

238. a. Have you heard about RTA? If NO, please skip the rest of the questions on thissection and submit your response *

Mark only one square.

☐ Yes
☐ No

239. b. If YES, how do you normally get information on RTA and its ongoingactivities/events? Please tick (✓) all that applies

Check all that apply.

☐ Social Media
☐ Website
☐ Kuensel
☐ BBS TV
☐ Radio – BBS Radio – Kuzoo FM
☐ Radio – Radio Valley
☐ Friends and Family
☐ Other: ....

240. c. Have you heard about the National Design and Art Competition (NDAC)? Pleasetick (✓)

Mark only one square.

☐ Yes
☐ No

d. Did you participate in National Design and Art Competition (NDAC)? Why? Pleasetick (✓) all that apply.

241. If YES,

Check all that apply.

☐ Prize money is attractive
☐ Certificate is valuable
☐ High prestige
☐ Process is simpleOther:

242. If NO

Check all that apply.

☐ Not interested

- [ ] Prize money was not attractive
- [ ] Low prestige
- [ ] Process is complicated
- [ ] Logistic problems
- [ ] Competition piece was not ready
- [ ] Other:

243. e. What can the RTA do to facilitate you continued weaving profession? Pleasetick (✓) all that apply.

Check all that apply.

- [ ] Providing periodic trainings
- [ ] Marketing of products
- [ ] Yarn banking
- [ ] Technological interventions
- [ ] Other:

APPENDIX B: CHARTS, GRAPHS, TABLES

Annexure B1 – General Information

B1.1: Respondents by gender

Gender	Percentage	Frequency
Female	99.3	6,033
Male	0.7	44
Total	**100.0**	**6,077**

B1.2: Respondents by age

Age	Percentage	Frequency
Less than 25 Years	11.9	723
26-35 Years	37.6	2,285
36-45 Years	29.2	1,775
46-55 Years	17.2	1,045
56 years & above	4.1	249
Total	**100.00**	**6,077**

B1.3: Respondents by education level

Education Level	Percentage	Frequency
No Formal Education	61.0	3,706
Primary Education (PP-VI)	8.0	484
Secondary Education (VII-X)	16.1	977
Higher Secondary (XI-XII)	9.0	544
Vocational Diploma	0.6	38
College	1.7	106
Basic University Degree	3.6	218
Post Graduate (MA, PhD)	0.1	4
Total	**100.0**	**6,077**

B1.4: Number of persons in the household

No. of Persons	Percentage	Frequency
6-8	15.5	943
9-11	1.0	59
Less than 5 heads	83.0	5,046
More than 12	0.5	29
Total	**100.0**	**6,077**

B1.5: Number of children in the household under 18 years

No. of children under 18 yrs	Percentage	Frequency
6-8	1.5	90
9-11	0.2	13
Less than 5	98.3	5,974
Total	**100.0**	**6,077**

B1.6: Interviewee's position in the family (Self-declare)

Interviewee's Position	Percentage	Frequency
Head of the family	13.7	830
House wife/ House husband	71.2	4,327
Daughter/ Daughter In law	12.1	735
Son / Son In law	0.2	13
Relatives	1.7	103
Others	1.1	69
Total	**100.0**	**6,077**

B1.7: Annual family income

Income Range	Percentage	Frequency
High Income	0.5	31
Low Income	39.2	2,382
Middle Income	60.3	3,664
Total	**100.0**	**6,077**

B1.8: Main family income activity

Income Activity	Percent	Frequency
Weaving	14.3	868
Farming	32.1	1,952
Livestock	6.0	364
Mix Farmning (Farming & Livestock)	20.8	1,264
Business (Not including crafts related activities)	4.2	255
Formal/Regular employment	12.5	760
Informal/Irregular employment	10.1	614
Total	**100.0**	**6,077**

B1.9: Respondents by Dzongkhags

Dzongkhag	Percentage	Frequency
Bumthang	1.3	80
Chhukha	15.7	954
Dagana	1.4	88
Gasa	0.3	18
Haa	1.7	102
Lhuentse	2.6	155
Monggar	5.2	314
Paro	10.0	609
Pemagatshel	4.6	281
Punakha	6.2	378
Samdrup Jongkhar	4.9	298
Samtse	9.5	579
Sarpang	3.9	240
Thimphu	7.5	454
Trashi Yangtse	2.6	158
Trashigang	8.0	488
Trongsa	0.7	42
Tsirang	1.0	61
Wangdue Phodrang	11.6	703
Zhemgang	1.2	75
Total	**100.00**	**6,077**

B1.10 – Participation by Regions

Region	Percent	Frequency
Central	9.6	586
Eastern	27.9	1,694
Western	55.0	3,343
Thimphu	7.5	454
Total	**100.0**	**6,077**

B1.11 – Crosstabulation for age groups by educational levels

Age Groups	Frequency /Percent	Post Graduate	University Degree	College	Higher Secondary (XI-XII)	Secondary Education (VII-X)	Vocational Diploma	Primary Education (PP-VI)	No Formal Education	Total
25 years and below	Frequency	0	25	74	319	207	0	37	23	**685**
	Percent	0.0	3.6	10.8	46.6	30.2	0.0	5.4	3.4	**100.0**
26-35 years	Frequency	0	185	29	205	574	15	209	938	**2,155**
	Percent	0.0	8.6	1.3	9.5	26.6	0.7	9.7	43.5	**100.0**
36-45 years	Frequency	4	8	4	21	154	23	146	1488	**1,848**
	Percent	0.2	0.4	0.2	1.1	8.3	1.2	7.9	80.5	**100.0**
46-55 years	Frequency	0	0	0	0	42	0	92	909	**1,043**
	Percent	0.0	0.0	0.0	0.0	4.0	0.0	8.8	87.2	**100.0**
56 and above	Frequency	0	0	0	0	0	0	0	346	**346**
	Percent	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	**100.0**
TOTAL	Frequency	4	218	107	545	977	38	484	3704	6077
	Percent	0.07	3.59	1.76	8.96	16.07	0.63	7.96	60.95	**100.00**

B1.12: Weaving as main family income activity by age

Age Range	Percent	Frequency
Less tha 25 years	4.1	39
26-35 Years	36.0	343
36-45 Years	36.0	343
46-55 Years	18.9	180
56 Years and above	5.1	49
Total	**100.0**	**954**

B1.13: Weaving as main family income activity by educational background

Educational Background	Percent	Frequency
No Formal Education	69.2	661
Primary Education (PP-VI)	11.8	113
Secondary Education (VII-X)	12.9	123
Higher Secondary (XI-XII)	2.5	24
College	0.1	1
Vocationally Diploma	0.0	0
Basic University Degree	3.5	33
Post Graduate (MA, PhD)	0.0	0
Total	**100.0**	**955**

B1.14: Weaving as main family income activity by Dzongkhag

Dzongkhag	Frequency	Weaving
Bumthang	2.1	20
Chhukha	21.7	207
Dagana	0.9	9
Gasa	0.0	0
Haa	1.2	11
Lhuentse	5.8	55
Monggar	3.5	33
Paro	15.1	144
Pemagatshel	1.0	10
Punakha	3.8	36
Samdrup Jongkhar	3.2	31
Samtse	19.5	186
Sarpang	2.3	22
Thimphu	7.9	75
Trashi Yangtse	0.4	4
Trashigang	4.2	40
Trongsa	0.0	0
Tsirang	1.3	12
Wangdue Phodrang	6.0	57
Zhemgang	0.3	3
Total	**100.0**	**955**

Annexure B2 – Textile Practice and Production Types

B2.1: Type of hand-woven textile practice and production

	Percent	Frequency
Yarn Production and processing	0.2	12
Dyeing	0.7	43
Weaving	96.7	5,876
Other	2.4	146
Total	**100.0**	**6,077**

B2.2: Gho – Karchang /Plain (Mathra, Sethra, Adha Mathra, Pangtshi, Jadrima, etc)

Production Frequency	Percent	Frequency
Not at all	10.3	624
Very Rarely	5.2	313
Rarely	13.3	807
Occasionally	31.1	1,889
Frequently	26.5	1,613
Most Frequently	13.7	831
Total	**100.0**	**6,077**

B2.3: Gho – Hor (Lungserma, Dromchuchem, Aikapur, Mentse Mathra)

Production Frequency	Percent	Frequency
Not at all	51.0	3,099
Very Rarely	5.9	359
Rarely	13.5	818
Occasionally	17.6	1,067
Frequently	9.4	570
Most Frequently	2.7	164
Total	**100.0**	**6,077**

B2.4: Gho – Shinglochem

Production Frequency	Percent	Frequency
Not at all	75.7	4,603
Very Rarely	7.2	438
Rarely	6.4	389
Occasionally	4.9	295
Frequently	4.4	265
Most Frequently	1.4	87
Total	**100.0**	**6,077**

B2.5: Kira – Karchang/ Plain (Mathra, Sethra, Adha Mathra, Pangtshi, Jadrima, Thara, etc)

Production Frequency	Percent	Frequency
Not at all	12.6	767
Very Rarely	5.2	317
Rarely	13.7	834
Occasionally	31.4	1,911
Frequently	26.7	1,621
Most frequently	14.0	850
Total	**100.0**	**6,077**

B2.6: Kira – Simple pattern /Jamsam

Production Frequency	Percent	Frequency
Not at all	36.4	2,211
Very Rarely	12.2	741
Rarely	14.4	877
Occasionally	14.2	861
Frequently	18.0	1,091
Most Frequently	4.9	296
Total	**100.0**	**6,077**

B2.7: Kira – Intricate pattern/ Dhidhim (Kushuthara, Mapsham, etc)

Production Frequency	Percent	Frequency
Not at all	84.0	5,105
Very Rarely	4.6	278
Rarely	3.6	217
Occasionally	5.7	347
Frequently	2.1	130
Most Frequently	0.0	0
Total	**100.0**	**6,077**

B2.8: Overall frequency of Yathra production (Percent / Frequency)

Production Frequency	Percent	Frequency
Not at all	98.8	6,007
Very Rarely	0.6	35
Rarely	0.4	24
Occasionally	0.1	4
Frequently	0.1	3
Most Frequently	0.1	4
Total	**100.0**	**6,077**

B2.9: Frequency of Yathra production by Dzongkhags (Frequency/ Percent)

Dzongkhags	Frequency / Percent	Not at all	Very Rarely	Rarely	Occas-sionaly	Fre-quently	Most Fre-quently	Total
Bumthang	Frequency	47	13	13	**4**	**3**	0	**80**
	Percent	58.8	16.3	16.3	**5.0**	**3.8**	0.0	**100**
Chhukha	Frequency	954	0	0	0	0	0	**954**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Dagana	Frequency	81	7	0	0	0	0	**88**
	Percent	92.0	8.0	0.0	0.0	0.0	0.0	**100**
Gasa	Frequency	18	0	0	0	0	0	**18**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Haa	Frequency	97	5	0	0	0	0	**102**
	Percent	95.1	4.9	0.0	0.0	0.0	0.0	**100**
Lhuentse	Frequency	155	0	0	0	0	0	**155**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Monggar	Frequency	312	2	0	0	0	0	**314**
	Percent	99.4	0.6	0.0	0.0	0.0	0.0	**100**
Paro	Frequency	597	4	4	0	0	**4**	**609**
	Percent	98.0	0.7	0.7	0.0	0.0	**0.7**	**100**
Pemagatshel	Frequency	277	0	4	0	0	0	**281**
	Percent	98.6	0.0	1.4	0.0	0.0	0.0	**100**

Dzongkhags	Frequency / Percent	Not at all	Very Rarely	Rarely	Occas-sionaly	Fre-quently	Most Fre-quently	Total
Punakha	Frequency	378	0	0	0	0	0	**378**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Samdrup Jongkhar	Frequency	296	2	0	0	0	0	**298**
	Percent	99.3	0.7	0.0	0.0	0.0	0.0	**100**
Samtse	Frequency	579	0	0	0	0	0	**579**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Sarpang	Frequency	240	0	0	0	0	0	**240**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Thimphu	Frequency	454	0	0	0	0	0	**454**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Trashi Yang-tse	Frequency	158	0	0	0	0	0	**158**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Trashigang	Frequency	483	2	3	0	0	0	**488**
	Percent	99.0	0.4	0.6	0.0	0.0	0.0	**100**
Trongsa	Frequency	42	0	0	0	0	0	**42**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Tsirang	Frequency	61	0	0	0	0	0	**61**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Wangdue Phodrang	Frequency	703	0	0	0	0	0	**703**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
Zhemgang	Frequency	75	0	0	0	0	0	**75**
	Percent	100.0	0.0	0.0	0.0	0.0	0.0	**100**
TOTAL	**Frequency**	**6,007**	**35**	**24**	**4**	**3**	**4**	**6,077**
	Percent	**98.8**	**0.6**	**0.4**	**0.1**	**0.0**	**0.1**	**100.0**

*B2.10: Other types of traditional textile (**Rachu, Kera, Kheb**, etc)*

Production Frequency	Percent	Frequency
Not at all	64.5	3,920
Very Rarely	12.0	732
Rarely	12.5	759
Occasionally	7.6	461
Frequently	2.4	148
Most Frequently	0.9	57
Total	**100.0**	**6,077**

B2.11: Contemporary textiles or fabric – e.g: scarves, stoles, textiles for soft furnishing, etc

Frequency	Percent	Frequency
Not at all	85.5	5,193
Very rarely	5.5	334
Rarely	3.9	236
Occasionally	2.8	173
Frequently	2.0	119
Most frequently	0.4	22
Total	**100.0**	**6,077**

B2.12: Type of contemporary textiles

Contemporary Textiles	Percent	Frequency
Bags	13.4	596
Hand gloves	22.3	989
Hats and socks	12.8	569
Scarf	14.8	657
Rice cooker cover	10.2	452
Shawl	8.0	356
table cloths	12.6	562
Wallet and purse	5.9	263
Total	**100.0**	**4,444**

B2.13: Dyeing practice by Dzongkhag

Dzongkhag	Percent	Frequency
Pemagatshel	90.7	39
Trashigang	9.3	4
Total	**100.0**	**43**

B2.14: Yarn production and processing practice by Dzongkhag

Dzongkhag	Percent	Frequency
Lhuentse	18.2	2
Samdrup Jongkhar	45.5	5
Trashigang	36.4	4
Total	**100.0**	**11**

B2.15: Production of contemporary textiles (e.g., scarves, stoles, soft furnishings, etc.) by age

Age Range	Frequency / Percent	Not at all	Very Rarely	Rarely	Occasion-ally	Frequently	Most Fre-quently	Total
25 years and below	Frequency	361	34	21	69	47	0	532
	Percent	8.5	0.8	0.5	1.6	1.1	0.0	12.5
26-35 years	Frequency	1396	71	108	48	50	0	1673
	Percent	32.7	1.7	2.5	1.1	1.2	0.0	39.2
36-45 years	Frequency	877	183	63	51	1	14	1189
	Percent	20.5	4.3	1.5	1.2	0.0	0.3	27.8
46-55 years	Frequency	636	38	30	5	21	7	737
	Percent	14.9	0.9	0.7	0.1	0.5	0.2	17.3
56 and above	Frequency	118	8	14	0	0	0	140
	Percent	2.8	0.2	0.3	0.0	0.0	0.0	3.3
Total	**Frequency**	**3388**	**334**	**236**	**173**	**119**	**21**	**4271**
	Percent	**79.3**	**7.8**	**5.5**	**4.1**	**2.8**	**0.5**	**100**

B2.16: Production of contemporary textiles (e.g., scarves, stoles, soft furnishings, etc.) by education level

		Not at all	Very Rarely	Rarely	Occa-sionally	Frequent-ly	Most Fre-quently	Total
Basic University Degree	Frequency	138	21	20	0	0	0	179
	Percent	3.2	0.5	0.5	0.0	0.0	0.0	4.2
College	Frequency	62	0	0	5	4	0	71
	Percent	1.5	0.0	0.0	0.1	0.1	0.0	1.7
Higher Secondary (XI-XII)	Frequency	296	35	14	38	65	0	448
	Percent	6.9	0.8	0.3	0.9	1.5	0.0	10.5
No Formal Edu-cation	Frequency	2000	182	100	56	31	21	2390
	Percent	46.8	4.3	2.3	1.3	0.7	0.5	56.0
Post Graduate (MA, PhD)	Frequency	4	0	0	0	0	0	4
	Percent	0.1	0.0	0.0	0.0	0.0	0.0	0.1
Primary Education (PP-VI)	Frequency	268	32	39	4	1	0	344
	Percent	6.3	0.7	0.9	0.1	0.0	0.0	8.1
Secondary Educa-tion (VII-X)	Frequency	598	49	62	70	18	0	797
	Percent	14.0	1.1	1.5	1.6	0.4	0.0	18.7
Vocational Diploma	Frequency	22	15	1	0	0	0	38
	Percent	0.5	0.4	0.0	0.0	0.0	0.0	0.9
Total	**Frequency**	**3388**	**334**	**236**	**173**	**119**	**21**	**4271**
	Percent	**79.3**	**7.8**	**5.5**	**4.1**	**2.8**	**0.5**	**100**

B2.17: Production of contemporary textiles (e.g., scarves, stoles, soft furnishings, etc.) by

Dzongkhag	Frequency / Percent	Not at all	Very Rarely	Rarely	Occasionally	Frequently	Most Frequently	Total
Bumthang	Frequency	45	22	3	5	0	0	**75**
	Percent	1.0	0.5	0.1	0.1	0.0	0.0	**1.6**
Chhukha	Frequency	634	45	30	0	0	0	**709**
	Percent	13.9	1.0	0.7	0.0	0.0	0.0	**15.6**
Dagana	Frequency	88	0	0	0	0	0	**88**
	Percent	1.9	0.0	0.0	0.0	0.0	0.0	**1.9**
Gasa	Frequency	12	0	1	1	0	0	**14**
	Percent	0.3	0.0	0.0	0.0	0.0	0.0	**0.3**
Haa	Frequency	56	10	10	0	6	0	**82**
	Percent	1.2	0.2	0.2	0.0	0.1	0.0	**1.8**
Lhuentse	Frequency	95	16	2	1	0	0	**114**
	Percent	2.1	0.4	0.0	0.0	0.0	0.0	**2.5**
Monggar	Frequency	99	17	1	1	0	0	**118**
	Percent	2.2	0.4	0.0	0.0	0.0	0.0	**2.6**
Paro	Frequency	368	96	60	15	4	0	**543**
	Percent	8.1	2.1	1.3	0.3	0.1	0.0	**11.9**
Pemagatshel	Frequency	64	0	0	0	0	0	**64**
	Percent	1.4	0.0	0.0	0.0	0.0	0.0	**1.4**
Punakha	Frequency	288	9	18	18	0	0	**333**
	Percent	6.3	0.2	0.4	0.4	0.0	0.0	**7.3**
Samdrup Jongkhar	Frequency	93	14	1	1	0	0	**109**
	Percent	2.0	0.3	0.0	0.0	0.0	0.0	**2.4**
Samtse	Frequency	384	49	13	30	33	10	**519**
	Percent	8.4	1.1	0.3	0.7	0.7	0.2	**11.4**
Sarpang	Frequency	136	20	22	2	12	0	**192**
	Percent	3.0	0.4	0.5	0.0	0.3	0.0	**4.2**
Thimphu	Frequency	272	32	16	31	28	11	**390**
	Percent	6.0	0.7	0.4	0.7	0.6	0.2	**8.6**
Trashi Yangtse	Frequency	28	1	1	0	0	0	**30**
	Percent	0.6	0.0	0.0	0.0	0.0	0.0	**0.7**
Trashigang	Frequency	88	2	5	1	0	0	**96**
	Percent	1.9	0.0	0.1	0.0	0.0	0.0	**2.1**
Trongsa	Frequency	40	0	0	0	0	0	**40**
	Percent	0.9	0.0	0.0	0.0	0.0	0.0	**0.9**
Tsirang	Frequency	36	0	0	0	0	0	**36**
	Percent	0.8	0.0	0.0	0.0	0.0	0.0	**0.8**
Wangdue Phodrang	Frequency	510	1	49	67	31	0	**658**
	Percent	11.2	0.0	1.1	1.5	0.7	0.0	**14.4**
Zhemgang	Frequency	52	0	4	0	5	0	**61**
	Percent	1.1	0.0	0.1	0.0	0.1	0.0	**1.3**
Total	**Frequency**	**3356**	**384**	**302**	**239**	**186**	**88**	**4555**
	Percent	**74.4**	**7.3**	**5.2**	**3.8**	**2.6**	**0.5**	**94**

Annexure B3 – Percentage of household income from weaving

B3.1: Percentage of household income derived from weaving in a month

Household income percentage	Percent	Frequency
Less than 25%	51.2	3,112
26% - 50%	18.2	1,103
51% - 75%	3.5	213
76% - 99%	0.3	19
No income	26.8	1,630
Total	**100.0**	**6,077**

Annexure B4 – Basic weaving practice

B4.1: Purpose of textile making

Textile making purpose	Percent	Frequency
Self-Use/Gift	82.6	5,017
Sell/Exchange	3.8	228
Others	13.7	832
Total	**100.0**	**6,077**

'Others': Weavers weaving based on order, commission, old age engagement

B4.2: Main usual helpers in weaving

Main helpers	Percent	Frequency
Apprentices	0.0	2
Cash paid workers	0.8	46
Family	54.3	3,297
Family restrict to weave	0.2	10
Friends	2.1	130
Master Artisans	0.1	4
Nobody helped me	42.3	2,572
Volunteers	0.1	8
Workers paid in Kind	0.1	8
Total	**100.0**	**6,077**

B4.3: Main reason helping in the weaving

Main reason for helping	Percent	Frequency
Family/Social obligation	78.3	2800
I don't know	0.6	23
They want to learn	0.7	25
To earn an income	16.4	586
Want to share their skills and knowledge	3.2	116
Wanting in favour in exchange	0.7	25
Total	**100.0**	**3,575**

B4.4: Mode of reward

Mode of reward	Percent	Frequency
Cash payment calculated by time	10.7	421
I Don't Know	1.2	51
Cash payment calculated when products are sold	0.3	49
Cash payment upon distribution of profit after sales of goods	84.7	11
Family/ Social acknowledgements	0.1	3,326
Donation to a cause	1.7	3
Payment in kind or exchanged in favours	1.3	66
Total	**100.0**	**3,927**

B4.5: Reasons for not rewarding

Reason for not rewarding	Percent	Frequency
Cannot afford to pay	0.5	13
No need to reward because of family/ social obligations	2.2	62
Owing/Recalling a favour in return	94.9	2,643
They refused payment/rewards	0.5	15
I Don't Know	1.9	53
Total	**100.0**	**2,786**

B4.6: Daily number of hours spent on weaving

Daily time spent on weaving	Percent	Frequency
Less than 1 Hour	2.5	153
2 – 3 Hours	22.1	1344
3 – 4 Hours	28.2	1715
4 – 5 Hours	18.7	1135
5 – 6 Hours	14.2	865
6 -7 Hours	4.1	247
More than 7 Hours	4.0	242
Weave occasionally	6.2	376
Total	**100.0**	**6077**

B4.7: Whether or not there daily fixed times when respondents are not weaving

Yes / No	Percent	Frequency
No	81.6	4,699
Yes	18.4	1,063
Total	**100.0**	**5,762**

B4.8: daily fixed times when respondents are not weaving (Refer A5.7)

Times not weaving	Percent	Frequency
Meal times	25.7	1,221
Prayer times	10.1	482
Time with the family	18.6	884
Rest time	14.0	667
Preparation for meals	26.2	1,247
Others	5.3	252
Total	**100.0**	**4,753**

B4.9a: Textile type taking the shortest duration to weave

Textiles	Percent	Frequency
Karchang textile	89.4	4826
Keyra	6.1	331
Rachu	2.6	141
Contemporary (scarfs, table cover, socks, etc)	1.9	101
Total	**100.0**	**5,399**

B4.9b: Shortest time taken to weave a textile type

Time duration to weave	Percent	Frequency
Within a day	7.2	389
Within 3 days	31.1	1669
Within a week	27.7	1491
Within two weeks	24.8	1330
Within a month	9.2	494
Total	**100.0**	**5,373**

B4.10a: Textile type taking the longest duration to weave

Textile Products	Percent	Frequency
Mathra (Adha and Bumthang)	7.4	452
Hor Gho	35.2	2,137
Gho Shinglochen	20.3	1,235
Karchang (Full Kira &Gho	0.3	19
Kushuthara	22.5	1,365
Yathra	10.9	665
Bura Gho and Kira	1.7	105
Nonresponse	1.6	99
Total	100.0	**6,077**

B4.10b: Longest time duration to weave a textile type

Time duration to weave	Percent	Frequency
Within a month	54.3	2401
Within 3 months	27.1	1198
Within 6 months	12.3	542
Within a year	4.4	196
More than a year	1.9	83
Total	**100.0**	**4,420**

Annexure B5: Production – Capital

B5.1: Main source of income to finance weaving

Source of financing weaving	Percent	Frequency
Income from sales of textiles	17.9	1,086
Money collected from family and friends	12.9	782
No need for capital because I am a paid/salaried artisan	0.6	36
No need for capital because weave based on order and gets necessary materials	3.9	236
Savings	53.6	3,260
Wages from other work	7.1	430
No concrete source of finance	4.1	247
Total	**100.0**	**6,077**

Annexure B6: Production – Raw Materials

B6.1(a): Frequency of use of Bhutanese fibre types

Bhutanese Fibre Type	Frequency/ Percent	Not at all	Very Rarely	Rarely	Occa-sionally	Fre-quently	Most Fre-quently	Total
Cotton	Frequency	536	55	26	47	55	19	**738**
	Percent	72.63	7.45	3.52	6.37	7.45	2.57	**100.0**
Sheep Wool	Frequency	565	37	20	19	6	2	**649**
	Percent	87.06	5.70	3.08	2.93	0.92	0.31	**100.0**
Yak wool	Frequency	582	24	8	11	7	3	**635**
	Percent	91.65	3.78	1.26	1.73	1.10	0.47	**100.0**
Nettle	Frequency	544	27	11	22	6	9	**619**
	Percent	87.88	4.36	1.78	3.55	0.97	1.45	**100.0**

B6.1(a): Frequency of use of traditional Bhutanese fibre types

Fibre	Percent/ Frequency	Not at all	Very Rarely	Rarely	Occa-sionally	Fre-quently	Most Fre-quently	Total
Cotton	Percent	96.7	0.9	0.4	0.8	0.9	0.3	**100.0**
	Frequency	5,875	55	26	47	55	19	**6,077**
Sheep Wool	Percent	98.6	0.6	0.3	0.3	0.1	0.0	**100.0**
	Frequency	5,993	37	20	19	6	2	**6,077**
Yak wool	Percent	99.1	0.4	0.1	0.2	0.1	0.0	**100.0**
	Frequency	6,024	24	8	11	7	3	**6,077**
Nettle	Percent	98.8	0.4	0.2	0.4	0.1	0.1	**100.0**
	Frequency	6,002	27	11	22	6	9	**6,077**

B6.1(b): Frequency of use of imported fibre types

Fibre Type	Percent/ Frequency	Not at all	Very Rarely	Rarely	Occa-sionally	Fre-quently	Most Fre-quently	Total
Cotton (Industrial produced)	Percent	66.4	6.9	5.0	11.3	3.7	6.6	**100.0**
	Frequency	4,037	422	303	689	223	403	**6,077**
Mercerised cotton (Khaling cotton)	Percent	75.8	7.6	8.0	3.5	5.0	0.2	**100.0**
	Frequency	4,606	460	486	211	301	13	**6,077**
Cotton (Hand produced)	Percent	86.2	6.2	5.3	1.2	0.6	0.5	**100.0**
	Frequency	5,238	374	325	72	38	30	**6,077**
Poly-cotton (Teri-cotton)	Percent	7.9	3.7	14.3	26.7	33.1	14.2	**100.0**
	Frequency	482	226	870	1,623	2,012	864	**6,077**
Reeled or Fila-ment Silk (Seshu)	Percent	48.2	4.7	12.7	13.7	15.5	5.2	**100.0**
	Frequency	2,927	286	771	835	942	316	**6,077**
Spun Silk (Bura)	Percent	47.0	3.9	12.2	15.4	17.5	4.0	**100.0**
	Frequency	2,854	235	744	936	1,062	246	**6,077**
Wool	Percent	90.9	3.8	2.5	1.9	0.3	0.6	**100.0**
	Frequency	5,524	231	150	117	20	35	**6,077**
Acrylic	Percent	62.5	2.8	1.2	0.3	0.0	33.2	**100.0**
	Frequency	3,796	172	71	18	3	2,017	**6,077**

B6.2(a): Satisfaction level of quality of traditional Bhutanese fibre types

Fibre Type	Percent/ Frequency	Extremely satisfied	Satisfied	Unsatisfied	Extremely unsatisfied	Total
Cotton	Percent	10.9	13.6	25.6	49.9	**100.0**
	Frequency	78	97	183	357	**71 5**
Sheep wool	Percent	10.1	8.3	32.0	49.6	**100.0**
	Frequency	68	56	215	333	**672**
Yak wool	percent	7.6	10.1	30.6	51.7	**100.0**
	Frequency	36	48	145	245	**474**
Nettle	Percent	4.4	3.5	42.5	49.6	**100.0**
	Frequency	26	21	254	296	**597**

B6.2(b): Satisfaction level of quality of imported fibre types

Fibre Type	Percent/ Frequency	Extremely satisfied	Satisfied	Unsatisfied	Extremely unsatisfied	Total
Cotton (Industrial produced)	Percent	0.8	0.8	78.6	19.8	**100.0**
	Frequency	20	18	1866	469	**2373**
Mercerised Cotton (Khaling Cotton)	Percent	1.9	.8	79.6	17.7	**100.0**
	Frequency	36	16	1520	338	**1910**
Cotton (Hand produced)	Percent	.2	1.3	67.9	30.7	**100.0**
	Frequency	2	17	886	400	**1305**
Poly Cotton (Teri-cotton)	Percent	6.6	.1	92.9	.5	**100.0**
	Frequency	360	3	5094	26	**5483.0**
Reeled or Filament Silk (Seshu)	Percent	11.8	0.1	84.2	3.9	**100.0**
	Frequency	387	3	2768	128	**3286**
Spun Silk (Bura)	Percent	8.1	0.2	85.9	5.7	**100.0**
	Frequency	272	8	2874	191	**3345**
Wool	Percent	5.4	1.9	61.2	31.5	**100.0**
	Frequency	54	19	611	314	**998**
Acrylic	Percent	1.8	45.2	53.0	.0	**100.0**
	Frequency	16	391	459	0	**866**

B6.3(a): Current cost of Bhutanese fibre types

Fibre Type	Percent/ Frequency	Extremely Cheap	Cheap	Reasonable	Expensive	Extremely Expensive	Total
Cotton	Percent	3.8	10.8	39.0	26.7	19.6	**100.0**
	Frequency	22	62	223	153	112	**572**
Sheep wool	Percent	3.7	7.6	16.2	39.6	32.9	**100.0**
	Frequency	17	35	75	183	152	**462**
Yak wool	Percent	1.0	4.6	17.5	36.5	40.4	**100.0**
	Frequency	5	23	88	183	203	**502**
Nettle	Percent	4.3	8.5	8.5	30.8	47.8	**100.0**
	Frequency	23	45	45	163	253	**529**

B6.3(b): Current cost of imported fibre types

Fibre Type	Percent/ Frequency	Cheap	Extremely Cheap	Extremely Expensive	Reasonable	Total
Cotton (Industrial Produced)	Percent	3.1	0.2	4.2	31.6	**100.0**
	Frequency	186	13	254	1,923	**6,077**
Mercerised Cotton (Khaling Cotton)	Percent	0.4	0.0	5.7	24.7	**100.0**
	Frequency	26	0	347	1,501	**6,077**
Cotton (Hand Produced)	Percent	1.9	0.1	4.2	15.1	**100.0**
	Frequency	116	4	253	920	**6,077**
Poly Cotton (Teri-cotton)	Percent	2.8	0.2	10.2	75.5	**100.0**
	Frequency	169	14	622	4,590	**6,077**

Fibre Type	Percent/ Frequency	Cheap	Extremely Cheap	Extremely Expensive	Reasonable	Total
Reeled or Filament Silk (Seshu)	Percent	0.5	0.0	36.1	17.3	**100.0**
	Frequency	31	1	2,194	1,049	**6,077**
Spun Silk (Bura)	Percent	0.1	0.0	34.4	20.8	**100.0**
	Frequency	8	0	2,088	1,263	**6,077**
Wool	Percent	2.2	0.2	5.5	7.6	**100.0**
	Frequency	133	13	334	463	**6,077**
Acrylic	Percent	2.9	0.0	2.0	8.3	**100.0**
	Frequency	174	1	122	507	**6,077**

B6.4(a): Cost-Quality relationship for traditional fibre types

Fibre Type	Percent/ Frequency	Extremely Agreeable	Agreeable	Unagreeable	Extremely Un-agreeable	Total
Cotton	Percent	14.5	59.8	4.4	21.3	**100.0**
	Frequency	83	342	25	122	**572**
Sheep wool	Percent	12.1	60.2	20.3	7.4	**100.0**
	Frequency	56	278	94	34	**462**
Yak wool	Percent	8.8	62.2	12.2	16.9	**100.0**
	Frequency	44	312	61	85	**502**
Nettle	Percent	16.3	48.4	20.4	14.9	**100.0**
	Frequency	86	256	108	79	**529**

B6.4(b): Cost-Quality relationship for imported fibre types

Fibre Type	Percent/ Frequency	Extremely Agreeable	Agree-able	Unagree-able	Extremely Unagreeable	Total
Cotton (Industrial produced)	Percent	2.7	84.6	12.2	0.5	**100.0**
	Frequency	63	1994	288	11	**2356**
Mercerised Cotton (Khaling cotton)	Percent	1.4	86.2	12.3	0.1	**100.0**
	Frequency	26	1624	232	2	**1884**
Cotton (Hand pro-duced)	Percent	0.5	76.4	21.5	1.6	**100.0**
	Frequency	6	967	272	20	**1265**
Poly-cotton (Teri-cot-ton)	Percent	0.0	94.2	1.2	4.6	**100.0**
	Frequency	0	5080	62	249	**5391**
Reeled or Filament Silk (Seshu)	Percent	9.5	80.6	9.9	0.0	**100.0**
	Frequency	307	2610	320	1	**3238**
Spun Silk (Bura)	Percent	0.0	82.9	9.8	7.3	**100.0**
	Frequency	0	2791	329	245	**3365**
Wool	Percent	2.6	71.6	24.5	1.2	**100.0**
	Frequency	25	692	237	12	**966**
Acrylic	Percent	0.1	53.8	44.1	1.9	**100.0**
	Frequency	1	443	363	16	**823**

B6.4(b): Cost-Quality relationship for imported fibre types

Fibre Types	Frequency/ Percent	Agreeable	Extremely Agreeable	Extremely Unagreeable	Unagreeable	Total
Cotton (industrial Produced)	Frequency	1,994	63	11	288	**2,356**
	Percent	84.6	2.7	0.5	12.2	**100.0**
Mercerised Cotton (Khaling Cotton)	Frequency	1,624	26	2	232	**1,884**
	Percent	86.2	1.4	0.1	12.3	**100.0**
Cotton (Hand Produced)	Frequency	967	6	20	272	**1,265**
	Percent	76.4	0.5	1.6	21.5	**100.0**
Poly Cotton (Teri-cotton)	Frequency	5,080	0	249	62	**5,391**
	Percent	94.2	0.0	4.6	1.2	**100.0**
Reeled or Filament Silk (*Seshu*)	Frequency	2,610	307	1	320	**3,238**
	Percent	80.6	9.5	0.0	9.9	**100.0**
Spun Silk (*Bura*)	Frequency	2,791	0	245	329	**3,365**
	Percent	82.9	0.0	7.3	9.8	**100.0**
Wool	Frequency	692	25	12	237	**966**
	Percent	71.6	2.6	1.2	24.5	**100.0**
Acrylic	Frequency	443	1	16	363	**823**
	Percent	53.8	0.1	1.9	44.1	**100.0**

B6.5(a): Accessibility to traditional Bhutanese fibre by types

Fibre Type	Percent/ Frequency	Extremely accessible	Accessible	Inaccessible	Extremely inaccessible	Total
Cotton	Percent	9.6	31.1	18.0	41.3	**100.0**
	Frequency	55	178	103	236	**572**
Sheep wool	Percent	3.2	14.3	27.9	54.5	**100.0**
	Frequency	15	66	129	252	**462**
Yak wool	Percent	3.4	13.3	50.4	32.9	**100.0**
	Frequency	17	67	253	165	**502**
Nettle	Percent	3.0	11.3	19.3	66.4	**100.0**
	Frequency	16	60	102	351	**529**

B6.5(b): Accessibility to imported fibre by types

Fibre Type	Percent/ Frequency	Extremely accessible	Accessible	Inaccessible	Extremely inaccessible	Total
Cotton (Industrial Produced)	Percent	0.9	74.6	22.1	2.4	**100.0**
	Frequency	21	1796	532	58	**2407**
Mercerised Cotton (Khaling Cotton)	Percent	2.2	61.1	33.8	2.9	**100.0**
	Frequency	42	1160	641	56	**1899**
Cotton (Hand Produced)	Percent	1.4	62.3	35.4	0.9	**100.0**
	Frequency	18	818	465	12	**1313**
Poly Cotton (Teri-cotton)	Percent	9.5	83.7	6.0	0.7	**100.0**
	Frequency	514	4509	322	39	**5384**
Reeled or Filament Silk (Seshu)	Percent	11.3	60.6	23.4	4.7	**100.0**
	Frequency	367	1970	761	154	**3252**
Spun Silk (Bura)	Percent	7.8	55.9	31.8	4.4	**100.0**
	Frequency	263	1879	1069	149	**3360**
Wool	Percent	0.2	51.1	37.8	10.9	**100.0**
	Frequency	2	551	408	118	**1079**
Acrylic	Percent	1.1	47.3	46.0	5.7	**100.0**
	Frequency	10	435	423	52	**920**

Annexure B7 – Production Costing

B7.1(a): Whether or Not they know the final selling price of their textiles (%)

Yes / No	Percent	Frequency
No	45.2	1,108
Yes	54.8	1,345
Total	**100.0**	**2,453**

B7.1(b): Whether or not they know the final selling price of their textiles by education level

Education level	Frequency/ Percent	No	Yes
No Formal Education	Frequency	671	899
	Percent	11.0	14.8
Primary Education (PP-VI)	Frequency	99	110
	Percent	1.6	1.8
Secondary Education (VII-X)	Frequency	196	203
	Percent	3.2	3.3
Higher Secondary (XI-XII)	Frequency	79	93
	Percent	1.3	1.5
Vocational Diploma	Frequency	0	4
	Percent	0.0	0.1
College	Frequency	21	2
	Percent	0.3	0.0
University Degree	Frequency	39	31
	Percent	0.6	0.5
Postgraduate (Master, PhD)	Frequency	0	0
	Percent	0.0	0.0
Total	**Frequency**	**1105**	**1342**
	Percent	**18.2**	**22.1**

B7.2: Whether or Not they calculate selling price of their own textiles (%)

Yes / No	Percent	Frequency
No	8.5	114
Yes	91.5	1,231
Total	100.0	1,345

B7.3: Whether or Not somebody else calculates the selling price of their textiles

Yes / No	Percent	Frequency
No	55.1	611
Yes	44.9	497
Total	100.0	1,108

B7.4: People who calculate selling price for their textiles (%)

Selling price calculation assistance by –	Percent	Frequency
Family members	0.4	4
Friends	46.5	446
Middle men	2.3	22
Shop keepers who sells my products	0.1	1
The person who orders the products from me	1.6	15
The person who pays my wages	0.1	1
Others	49.0	470
Total	**100.0**	**959**

B7.5: Whether or Not they know how to calculate the selling price of their textiles (%)

Knowledge on selling price calculation	Percent	Frequency
No	4.1	249
Not Sure	7.8	473
Yes	28.5	1,731
Missing value	59.6	3,624
Total	**100.0**	**6,077**

B7.6: Whether or Not they know what most affected the selling price of their textiles in the past 5 years (%)

Selling price affected by –	Percent	Frequency
Demand	33.4	749
Design	6.1	136
Labour	4.3	96
Mark-up/Profit	17.2	385
Raw materials	7.8	174
Others	31.3	702
Total	**100.0**	**2,242**

B7.7: Satisfaction level with the most recent selling price of their textiles (%)

Satisfaction level	Percent	Frequency
Close to market price	24.9	458
Easy to sell and fast turn over	19.8	364
Good profit	9.4	172
Price and quality is acceptable by the market	33.0	607
I don't know	10.3	189
Others	2.7	49
Total	**100.0**	**1,839**

Others: self-use, wages, etc

B7.8: Reason for unhappiness with the most recent selling price of their textiles (%)

Reason for unhappiness	Percent	Frequency
Cost of production higher than selling price	55.7	844
I don't know	37.4	566
Other	6.9	105
Total	**100.0**	**1,515**

Others: Textile sold by friend, pandemic, self-use, etc

B7.9: Views on price comparison of their textiles with other similar textiles for sale on the market in the past 5 years (%)

Price comparison	Percent	Frequency
Too High	7.7	144
High	12.2	228
Almost the same	68.6	1,279
Low	5.0	94
Too Low	0.5	10
I don't know	5.8	109
Total	**100.0**	**1,864**

B7.10: Whether or Not there have been price fluctuations in the last 5 years on their textiles (%)

Price fluctuations	Percent	Frequency
Increased	69.7	1,374
Decreased	12.1	239
Remained the same	11.1	219
I don't know	7.0	138
Total	**100.0**	**1,970**

Annexure B8: Production – Business Operations

B8.1: Location of most weaving products

Weaving Location	Percent	Frequency
Home	97.9	5,040
Shop/market	1.0	53
Other fixed place	1.1	55
Total	**100.0**	**5,148**

B8.2: Number of weaving months in the past 12 months

No. of weaving months	Percent	Frequency
1 month	2.8	169
3 months	28	1,704
6 months	32.8	1,994
9 months	9.1	551
12 months	6.8	412
No weaving in last 12 months	20.5	1,247
Total	**100.0**	**6,077**

B8.3: No weaving months in the year

No weaving months	Percent	Frequency
January	2.8	173
February	4.9	299
March	6.4	388
April	10.3	623
May	9.5	578
June	6.7	405
July	6.4	388
August	7.0	426
September	7.2	435
October	6.3	381
November	5.3	321
December	5.5	332
No weaving in last 12 months	21.9	1,328
Total	**100.0**	**6,077**

B8.4: Reasons for not weaving during those specified months

Reasons for not weaving	Percent	Frequency
Time with Family	28.9	886
Unavailability of raw materials	11.6	355
Farming seasons	32.5	998
Pilgrimage/Festivals	22.1	678
Others	4.9	151
Total	**100.0**	**3,068**

B8.5: Weaving with 'farming' and 'mixed farming'

Farming Practice	Frequency / Percent	1 month	3 months	6 months	9 months	12 months	Total
Farming	Frequency	19	510	253	46	9	**837**
	Percent	1.2	32.9	16.3	3.0	0.6	**54.0**
Mix Farming (Farming & Live-stock)	Frequency	21	507	151	10	23	**712**
	Percent	1.4	32.7	9.7	0.6	1.5	**46.0**
Total	**Frequency**	**40**	**1017**	**404**	**56**	**32**	**1549**
	Percent	**2.6**	**65.7**	**26.1**	**3.6**	**2.1**	**100**

Annexure B9: Production – Merchandizing

B9.1: Decision maker on what and how much to weave

Decision maker	Percent	Frequency
Family members	1.9	117
Friends	0.0	2
Government officials	0.0	1
Middle men	0.3	18
Persons who order from you	4.4	265
Persons who pay my wages	2.6	160
Yourself	71.4	4,338
No weaving in recent itmes	19.4	1,176
Total	**100.0**	**6,077**

B9.2: Basis for the decision on what and how much to weave

Basis for decision	Percent	Frequency
From advise from family & friends	2.5	153
From customers' orders	19.9	1,209
From following trends	6.6	404
From government advice	0.1	6
From looking at other producers	2.7	165
From market knowledge	2.2	133
From past years' experience and records	19.8	1,206
Others	0.3	20
I don't know	6.4	386
No weaving in recent times	39.4	2,395
Total	**100.0**	**6,077**

Annexure B10: Production – Advertising and Promotion

B10.1: Means of advertisement and promoting textile products

Means of Advertisement, Promotion	Percent	Frequency
I promote the textiles myself by selling them myself	45.6	1,323
I have a good reputation of making these textiles	5.8	168
These textiles are traditionally sold in the area	2.3	68
By word of mouth	8.0	232
Family and friends help to promote my textiles	17.9	520
Through social media by unknown persons	0.4	11
I don't know	5.7	165
I don't need to advertise because I work for wages	12.3	356
Others	1.9	56
Total	**100.0**	**2,899**

Annexure B11: Production – Purchaser Profile

B11.1: Whether or Not respondents know their main purchasers

Knowing main purchasers	Percent	Frequency
Yes	78.8	1535
No	17.4	339
Maybe	3.8	75
Total	**100.0**	**1,949**

B11.2: Purchasers – Bhutanese or Non-Bhutanese

Nationality	Percent	Frequency
Bhutanese	98.7	1,606
Non- Bhutanese	1.3	21
Total	**100.0**	**1,627**

B11.3: Identifying the main customers

Main purchasers	Percent	Frequency
Government or other public firms	0.2	4
Large enterprises	0.4	6
Local retail traders	6.6	112
NGO or international organization	0.8	14
Other households or individuals	82.3	1,394
Small enterprises	8.6	146
Others	1.0	17
Total	**100.0**	**1,693**

B11.4: Geographical distribution of customers

Geographical distribution	Percent	Frequency
All over Bhutan (except Thimphu)	11.4	187
Same Dzongkhag	39.7	650
Same Gewog	10.4	170
Same Region (East, West and Central)	28.2	463
Thimphu	8.3	136
Others	2.0	33
Total	**100.0**	**1,639**

B11.5: Customers by gender

Gender	Percent	Frequency
Female	38.1	629
Male	3.5	57
Male and Female in equal Proportion	58.4	963
Total	**100.0**	**1,649**

B11.6: Customers by age

Age range	Percent	Frequency
21 - 29	7.7	124
30 - 39	57.7	933
40 - 49	30.1	487
50 - 59	4.5	73
Above 60	0.1	1
Total	**100.0**	**1,618**

B11.7: Geographical distribution of individual customers

Location	Percent	Frequency
All over Bhutan (except Thimphu)	12.5	201
Same Dzongkhag	41.2	661
Same Gewog	8.7	140
Same Region (East, West, Central and South)	30.3	486
Thimphu	7.3	118
Total	**100.0**	**1,606**

B11.8: Non-Bhutanese purchasers by gender

Gender	Percent	Frequency
Female	44.3	35
Male	2.5	2
Male and Female in Equal Proportion	53.2	42
Total	**100.0**	**79**

B11.9: Non-Bhutanese purchases by age

Age range (Years)	Percent	Frequency
21 - 29	3.8	3
30 - 39	21.5	17
40 - 49	45.6	36
50 - 59	13.9	11
Above 60	15.2	12
Total	**100.0**	**79**

B11.10: Whether or Not they know nationalities of their customers

Knowing customers	Percent	Frequency
No	70.6	60
Yes	29.4	25
Total	**100.0**	**85**

B11.11: Customers – International or Regional (SAARC Countries)

Customers	Percent	Frequency
International	73.3	22
Regional (SAARC Countries)	26.7	8
Total	**100.0**	**30**

B11.12: Average purchase volume in the past 5 years

Volume of purchase (Nu)	Percent	Frequency
Less than 1,00,000	60.0	15
101,000 – 200,000	8.0	2
201,000 – 300,000	8.0	2
301,000 – 400,000	8.0	2
401,000 – 500,000	12.0	3
Above 500,000	4.0	1
Total	**100.0**	**25**

B11.13: Popularity of textiles by type

Textile Type	Percent/ Frequency	Not Popular	Rarely Popular	Least Popular	Moderately Popular	Popular	Most Popular	Total
Traditional Kira textiles	Percent	15.3	17.4	18.6	25.8	12.1	10.8	**100.0**
	Frequency	932	1,057	1,133	1,566	733	656	**6,077**
Traditional Gho textiles	Percent	18	15.3	30.7	20.3	10.2	5.5	**100.0**
	Frequency	1,096	927	1,864	1,235	619	336	**6,077**
Other traditional textiles (Rachu, Kera, etc.)	Percent	9.3	10.8	15.7	18.5	30	15.7	**100.0**
	Frequency	565	656	954	1,125	1,823	954	**6,077**
Yatha textiles	Percent	39.1	22.4	14.3	10.1	7.9	6.2	**100.0**
	Frequency	2,377	1,364	866	614	481	375	**6,077**
Contemporary scarves and shawls	Percent	16.2	12.1	14.2	16.4	22.7	18.4	**100.0**
	Frequency	986	735	865	997	1,377	1,117	**6,077**
Soft furnishings (e.g. Placemats, table runners, etc.)	Percent	16.1	14.9	17.5	19.2	17.8	14.5	**100.0**
	Frequency	978	907	1,065	1,165	1,081	881	**6,077**

B11.14: Weavers who sell to non-Bhutanese purchasers by education

Educational Background	Percent	Frequency
University Degree	0.0	0
College	0.0	0
Higher Secondary (XI-XII)	14.3	3
No Formal Education	81.0	17
Postgraduate (Master's, Ph.D)	0.0	0
Primary Education (PP-VI)	0.0	0
Secondary Education (VII-X)	4.8	1
Vocational Diploma	0.0	0
Total	**100.0**	**21**

B11.15: Weavers who sell to non-Bhutanese purchasers by Dzongkhag

Dzongkhags	Percent	Frequency
Bumthang	19.0	4
Chhukha	0.0	0
Dagana	0.0	0
Gasa	0.0	0
Haa	0.0	0
Lhuentse	4.8	1
Monggar	0.0	0
Paro	0.0	0
Pemagatshel	9.5	2
Punakha	0.0	0
Samdrup Jongkhar	0.0	0
Samtse	47.6	10
Sarpang	0.0	0
Thimphu	19.0	4
Trashi Yangtse	0.0	0
Trashigang	0.0	0
Trongsa	0.0	0
Tsirang	0.0	0
Wangdue Phodrang	0.0	0
Zhemgang	0.0	0
Total	**100.0**	**21**

Annexure B12: Production – Marketing and Sales

B12.1: Place of sale of textile products

Place of sale	Percent	Frequency
At home	59.3	3209
Local Market	20.9	1131
All over Bhutan	11.0	595
Neighbouring country (India, Nepal and Bangladesh)	0.3	16
Others	8.5	460
Total	**100.0**	**5,411**

B12.2: Base of most frequent customers

Base of customers	Percent	Frequency
Same Gewog	9.4	509
Same Dzongkhag	37.5	2030
Same Region	26.1	1413
All over Bhutan (Except Thimphu)	10.0	541
Thimphu	12.4	671
Others	4.6	249
Total	**100.0**	**5,413**

B12.3: Main mode of sale of textiles

Mode of sale	Percent	Frequency
Sell it myself directly to customers	50.0	2701
On consignments to a shop	6.5	352
Direct sale to shop	6.2	336
I exchange my labour for wages	2.5	135
Made to order and delivered to customers	21.7	1174
Online Shop	2.5	135
Temporary marketing events such as Tsechus, local festivals, trade fairs and crafts festivals	7.9	428
Others	2.7	146
Total	**100.0**	**5,406**

B12.4(a): Challenges in selling products

Challenges	Percent	Frequency
Lack of Transportation	7.5	355
Lack of manpower to sell	11.9	568
Market access difficult	35.4	1,686
Over-supply and low price	9.6	456
Do not trust middlemen	3.3	155
Products do not fit with the market	2.0	96
Customers cannot afford	25.7	1,225
I don't know	1.8	86
Others	2.8	133
Total	**100.0**	**4,760**

B12.4(b): Reasons for being able to sell products

Reasons	Percent	Frequency
Good demand	44.7	600
I don't know	0.9	12
Trust worthy middlemen	2.2	29
Good transportation	5.2	70
Products are suitable for target markets	35.8	480
Supported by Government or other authorities	0.1	2
Others	11.1	149
Total	**100.0**	**1,342**

B12.5: Knowing their best-selling product in the last 5 years

Knowing best-selling product	Percent	Frequency
Yes	50.7	2,964
No	32.5	1,899
Not Sure	16.8	980
Total	**100.0**	**5,843**

B12.6: Best-selling product in the last 5 years by product name

Product Name	Percent	Frequency
Bura	13.2	635
Bumthang Mathra	1.2	56
Hor	18.0	866
karchang	53.3	2,566
Kushuthara	5.5	263
Kayra	3.6	171
Rachu	5.3	256
Total	**100.0**	**4,813**

B12.7: Best-selling product in the last 5 years by Selling price

Selling Price	Percent	Frequency
1,000-20,000	31.8	1,532
21,000-40,000	16.4	789
41,000-60,000	12.1	584
61,000-80,000	16.3	786
81,000-100,000	15.9	763
More than 100,000	7.5	359
Total	**100.0**	**4,813**

B12.8: Best-selling product in the last 5 years by quantity sold within a year

Quantity	Percent	Frequency
1-5 Pieces	29.7	1,429
6-10 Pieces	38.1	1,833
11- 15 Pieces	20.5	987
More than 15 Pieces	11.7	564
Total	**100.0**	**4,813**

B12.9: Knowing their worst-selling product in the last 5 years

Knowing Worst-selling Product	Percent	Frequency
No	68.1	4,138
Not Sure	11.1	675
Yes	20.8	1,264
Total	**100.0**	**6,077**

B12.10: Worst-selling product in the last 5 years by product name

Product Name	Percent	Frequency
Bura	12.3	156
Hor	15.0	189
karchang	22.6	286
Kushuthara	36.6	463
Kayra	7.4	93
Rachu	6.1	77
Total	**100.0**	**1,264**

B12.11: Worst-selling product in the last 5 years by selling price

Selling Price	Percent	Frequency
1000-5000	44.4	561
6000-10000	28.8	364
11000-15000	22.5	284
More than 15000	4.4	55
Total	**100.0**	**1,264**

B12.12: Worst-selling product in the last 5 years by quantity sold within a year

Quantity	Percent	Frequency
1-5 Pieces	77.4	978
6-10 Pieces	13.8	175
11- 15 Pieces	7.0	89
More than 15 Pieces	1.7	22
Total	**100.0**	**1,264**

B12.13: Reasons that the product did not sell well

Reasons	Percent	Frequency
To expensive	26.7	350
Wrong size	24.3	318
Colour combination not attractive	17.8	233
Poor weaving quality	9.0	118
Poor finishing	9.2	120
Other	13.0	170
Total	**100**	**1309**

B12.14: Whether or Not sales of products have changed in the past 5 years

Change in Product Sales	Percent	Frequency
Increased Markets	58.9	1,875
Decline	22.5	716
No change	18.6	592
Total	**100.0**	**3,183**

B12.15: Change in sales of products in the past 5 years by period of time

Change in sales by time period	Percent	Frequency
Last 0 – 1Years	30.8	979
Last 1 – 2 Years	45.8	1,457
Last 3 – 4 Years	15.3	486
Last 5 Years	8.2	261
Total	**100.0**	**3,183**

Annexure B13: Production – Payment Procedure

B13.1: Challenges in paying supplier/workers/creditors

Challenges	Percent	Frequency
No cash in hand	38.5	1,239
Lack of credit	12.5	404
Sales with poor profit	8.4	272
Problems in sales turnover/cash flow	10.7	345
No access to financial resources	19.8	637
I don't know	9.4	303
Other	0.6	20
Total	**100.0**	**3,220**

B13.2: Reasons for no difficulties in paying supplier/workers/creditors

Reasons	Percent	Frequency
Cash readily available in hand	47.7	1,321
Easy access to cash/savings	31.8	879
Exchange with labour or materials as payments	2.2	61
Good sales with good profit	7.4	206
Prompt payments from customers	5.1	141
I don't know	0.6	17
Others	5.1	142
Total	**100.0**	**2,767**

B13.3: Challenges in collecting payments from customers

Challenges	Percent	Frequency
Customers short of cash	52.4	1,260
Payments not in cash	32.1	772
Difficult to collect payments from family/friends	7.3	176
Difficult to locate middlemen to obtain payments	4.2	102
I don't know	3.3	79
Others	0.6	14
Total	**100.0**	**2,403**

B13.4: Reasons for having no difficulties in collecting payments from customers

Reasons	Percent	Frequency
Cash terms only	28.0	1,352
Customers always pay in cash	38.7	1,869
Middle men trust worthy and payment is punctual	11.8	568
Payments immediate / payment terms favourable	20.4	986
Others	1.0	49
Total	**100.0**	**4,824**

B13.5: Whether or Not credit terms are provided to the customers

Provision of Credits	Percent	Frequency
Always	6.6	136
Definitely not	5.6	114
It depends	87.8	1,799
Total	**100.0**	**2,049**

B13.6: Period of credit terms

Credit Terms	Percent	Frequency
Within a week	65.6	1,345
Within a month	26.6	546
Within 3 months	4.3	89
Within 6 months	2.8	57
Within a year	0.6	12
Total	**100.0**	**2,049**

B13.7: Payment for the commissioned weaving

Payment	Percent	Frequency
Customer pay/transfer to you the cash to purchase all the yarns and all the labour cost for the textiles.	19.3	49
Customers pay/transfer to you the cash to purchase all the yarns and part of the labour cost for the textile.	37.8	97
Customers pay/transfer to you the cash to purchase all the yarns for the textile only.	42.9	110
Total	**100.0**	**256**

B13.8: Payment upon completion of the commissioned weaving

Payment	Percent	Frequency
Customer do not pay/transfer to you any cash as everything was paid up-front.	7.0	164
Customers pay/transfer to you the cash for all or part of the labour and some of the yarns as the initial purchase of the yarns were not sufficient to complete the commissioned textiles.	18.8	440
Customers pay/transfer to you the cash for all or part of the labour as the yarns were already paid and the quantities were sufficient to complete the commissioned textiles.	29.6	694
Obtain the full payment for yarns and labour	44.6	1,046
Total	**100.0**	**2,344**

B13.9: Mode of payment

Mode of Payment	Percent	Frequency
Cash terms	56.8	2,698
Through cheque, money transfers	21.4	1,015
Using on-line app-based transfers	20.8	986
Exchange with materials (grain, food, livestock, etc…)	0.3	16
Exchange with labour	0.7	35
Total	**100.0**	**4,750**

B13.10: Usual usage of income/profit generated

Usage	Percent	Frequency
Household expenses	54.1	2,654
Savings	19.5	956
Education	14.2	697
Plough back into existing weaving practices	5.2	256
Investment into other areas	2.3	113
I don't know where the money goes	4.7	231
Total	**100.0**	**4,907**

B13.11: Decision-making on the usage of the income

Decision-Maker	Percent	Frequency
Self	73.6	3,029
Spouse	23.3	959
Parents	2.0	83
Siblings	1.1	47
Total	**100.0**	**4,118**

B13.12: Satisfaction in the decision-making process

Satisfaction	Percent	Frequency
Yes	93.2	2,152
No	2.6	59
I rather not say	4.2	97
Total	**100.0**	**2,308**

B13.13: Mode of payment by educational level

Educational Background	Frequency /Percent	Cash Terms	Using on-line app-based transfers	Total
University Degree	Frequency	1	12	13
	Percent	0.1	0.6	0.7
College	Frequency	2	2	4
	Percent	0.1	0.1	0.2
Higher Secondary (XI-XII)	Frequency	26	31	57
	Percent	1.4	1.6	3.0
No Formal Education	Frequency	1275	144	1419
	Percent	66.5	7.5	74.1
Postgraduate (Master's, Ph.D)	Frequency	0	0	0
	Percent	0.0	0.0	0
Primary Education (PP-VI)	Frequency	130	8	138
	Percent	6.8	0.4	7.2
Secondary Education (VII-X)	Frequency	195	90	285
	Percent	10.2	4.7	14.9
Vocational Diploma	Frequency	0	0	0
	Percent	0.0	0.0	0.0
Total	**Frequency**	**1629**	**287**	**1916**
	Percent	**85.0**	**15.0**	**100**

Annexure B14: Production – Packaging and Delivery

B14.1: Whether or Not products are sold the faraway places

Yes / No	Percent	Frequency
Yes	41.9	1,698
No	58.1	2,359
Total	**100.0**	**4,057**

B14.2: Whether or Not there are difficulties in delivering their products to other regions

Yes / No	Percent	Frequency
No	68.8	2,792
Yes	31.2	1,265
Total	**100.0**	**4,057**

B14.3: Reasons for difficulties in delivering their products to other regions

Reasons for challenges	Percent	Frequency
Lack of transportation (vehicles)	54.5	689
Lack of roads	4.2	53
Lack of labour	17.2	217
Lack of knowledge	2.5	32
High cost	18.7	236
I don't know	1.2	15
Others	1.8	23
Total	**100.0**	**1,265**

B14.4: Whether or not they pack their products for delivery

Yes / No / Sometimes	Percent	Frequency
No	44.0	848
Sometimes	40.8	786
Yes	15.2	294
Total	**100**	**1,928**

B14.5: Manner of packing for delivery

Packing materials	Percent	Frequency
Plastic Bag	42.2	124
Cartoon Box	19.0	56
Cloth Piece	38.8	114
Total	**100.0**	**294**

B14.6: Whether or not there are current challenges with packing

Yes / No	Percent	Frequency
No	54.8	990
Yes	45.2	816
Total	**100.0**	**1,806**

B14.7: Reasons for packing challenges

Reasons for packing challenges	Percent	Frequency
No experience	16.7	136
Lack of packing materials	27.7	226
High cost of packing materials	50.7	414
Lack of labour	3.3	27
I don't know	1.6	13
Total	**100.0**	**816**

Annexure B15: Skills and Education

B15.1: Weaving skills learned from

Sources of learning weaving skills	Percent	Frequency
Handed down from own ancestors	41.8	2,488
Other family members	25.5	1,519
Friends or neighbours	19.4	1,157
Self-taught	11.5	687
Master weaver	0.2	12
Government training courses / vocational schools	1.6	95
Total	**100.0**	**5,958**

B15.2: Age of starting to weave

Starting age for weaving	Percent	Frequency
13 – 20	62.4	3,654
21 – 30	27.2	1,591
31 – 40	0.4	21
41 – 50	0.3	18
Above 50	0.1	3
Below 12	9.7	567
Total	**100.0**	**5,854**

B15.3: Reasons for passing on skills to others

Reasons for passing on skills	Percent	Frequency
To carry on family tradition	24.7	2,236
To continue traditional handicraft in the community	22.0	1,986
To help promote this craft	12.9	1,165
Help others	10.7	965
To improve economic conditions of the family/ community	15.0	1,359
Government / community leaders' encourage	9.6	869
I don't know	5.1	458
Total	**100.0**	**9,038**

B15.4: Reasons for not wanting to pass on skills to others

Reasons for not passing on skills	Percent	Frequency
Does not generate enough money	3.6	7
Does not help improve economic conditions of the family/ community	0.5	1
Government / community leaders' do not encourage	0.5	1
Low prestige	2.5	5
Nobody is interested to learn	5.6	11
I don't know	83.2	164
Others	4.1	8
Total	**100.0**	**197**

B15.5: Responsibilities for passing on the skills

Responsibilities	Percent	Frequency
Family (next generation)	24.0	1,456
Community	19.5	1,188
Friends	21.3	1,295
Anyone who is interested	35.2	2,138
Total	100.0	6,077

B15.6: Wanting to improve: General skills, Textile designing and technical skills, Business skills

Skills improvement areas	Frequency/ Percent	Very Urgent	Urgent	Not Urgent	Total
a. General Skills					
General literacy	Percent	31.7	38.9	29.4	**100.0**
	Frequency	1,658	2,032	1,533	**5,223**
General numeracy	Percent	32.0	38.4	29.6	**100.0**
	Frequency	1,664	1,994	1,537	**5,195**
Personal Hygiene	Percent	31.1	35.8	33.1	**100.0**
	Frequency	1,614	1,860	1,720	**5,194**
b. Textile Designing and Technical Skills					
Contemporary Textile Weave Design	Percent	38.3	45.0	16.8	**100.0**
	Frequency	2,003	2,354	877	**5,234**
Traditional Textile Weave Design	Percent	41.5	44.9	13.6	**100.0**
	Frequency	2,178	2,358	713	**5,249**
Colour Combinations	Percent	54.2	31.3	14.5	**100.0**
	Frequency	2,823	1,631	755	**5,209**
Fibre Knowledge	Percent	50.6	29.4	20.0	**100.0**
	Frequency	2,520	1,464	995	**4,979**
Yarn Spinning and Plying	Percent	50.6	29.4	20.0	**100.0**
	Frequency	2,520	1,464	995	**4,979**
Natural Dyeing Techniques	Percent	49.2	37.1	13.7	**100.0**
	Frequency	2,523	1,901	700	**5,124**
Upgrade existing weaving and textile production skills (On backstrap looms)	Percent	35.1	50.4	14.5	**100.0**
	Frequency	1,800	2,587	742	**5,129**
New weaving techniques and textile production skills (on horizon frame looms/Meche loom)	Percent	41.9	42.1	16.0	**100.0**
	Frequency	2,124	2,132	809	**5,065**
Textile Finishing Techniques	Percent	48.4	35.4	16.2	**100.0**
	Frequency	2,471	1,808	829	**5,108**
C. Business Skills					
Basic Finance, Accounting and Budgeting	Percent	30.3	42.0	27.7	**100.0**
	Frequency	1,494	2,067	1,363	**4,924**
Inventory, Sales and Marketing (including digital marketing)	Percent	31.3	42.0	26.7	**100.0**
	Frequency	1,551	2,079	1,323	**4,953**
Production Planning and Time Management	Percent	29.2	40.1	30.7	**100.0**
	Frequency	1,439	1,973	1,513	**4,925**

B15.7: Mode for improving weaving skills

Improving weaving skills mode	Percent	Frequency
Learn from others	23.4	3,394
Practice more	30.0	4,361
Take part in training courses	25.0	3,631
Learn more from master weaver	9.6	1,394
More exposure	12.0	1,750
Total	**100.0**	**14,530**

B15.8: Preferences for the trainings

Preferences for trainings	Frequency/ Percent	Most Preferred	Preferred	Least Preferred	Total
Frequent short-term training within a week at your locality	Frequency	2,261	1,413	1,255	4,929
	Percent	45.9	28.7	25.5	100.0
Frequent short-term training within a week at regional/centralized at RTA	Frequency	1,677	1,681	1,529	4,887
	Percent	34.3	34.4	31.3	100.0
Frequent mid-term duration training of maximum of 1 month at your locality	Frequency	1,927	1,666	1,285	4,878
	Percent	39.5	34.2	26.3	100.0
Frequent mid-term duration training of maximum 1 month at a regional / centralized at RTA	Frequency	1,203	1,861	1,805	4,869
	Percent	24.7	38.2	37.1	100.0
Long-term training up to 1 – 3 months at regional/centralized at RTA	Frequency	869	1,926	2,043	4,838
	Percent	18.0	39.8	42.2	100.0
6 months – 1year at a centralized at RTA	Frequency	781	1,460	2,576	4,817
	Percent	16.2	30.3	53.5	100.0

B15.9: Preferred months for training in the year

Months in the year	Percent	Frequency
January	14.1	2,627
February	9.3	1,737
March	3.4	641
April	3.1	577
May	4.8	899
June	6.0	1,126
July	6.7	1,253
August	10.0	1,869
September	8.7	1,625
October	6.7	1,256
November	12.7	2,364
December	14.2	2,654
Total	**100.0**	**18,628**

B15.10: Respondents who would prefer their weaving skills to be certified

Would like certification	Percent	Frequency
It officially validates my skills against a national certified system	21.9	1,332
It makes it easier to quote a standard acceptable rate when I am commissioned with a piece of weaving work	11.8	717
It gives me recognition amongst my family and community	9.6	581
It gives me a sense of value	14.7	894
It is prestigious	8.5	518
It provides me with an indication of where I am as a weaver in Bhutan	10.0	609
It indicates to me which particular skills I need to further improve upon	14.3	871
Facilitates opportunities for employment	1.9	114
I don't know	0.9	57
Nonresponse	6.3	384
Total	**100.0**	**6,077**

B15.11: Respondents who would not like weaving skills to be certified

Would not like certification	Percent	Frequency
Not interested to have my skills officially validated	37.0	142
Having my skills certified will work against me when I give a quote when commissioning with a piece of weaving work	0.5	2
Because people already know the standard of my weaving skills	12.5	48
I don't need an officially certified system to validate my skills	9.1	35
It is not prestigious	1.3	5
I already know where I stand as a weaver in Bhutan	12.5	48
I don't know	27.1	104
Total	**100**	**384**

B15.12: Reasonableness for a fee to be charged for any of the above listed trainings

Yes / No	Percent	Frequency
Yes	8.9	541
No	72.7	4,418
Don't Know	18.4	1,118
Total	**100.0**	**6,077**

B15.13: If fees are charged – willingness to contribute to the cost for the above trainings

Yes / No	Percent	Frequency
No	74.2	1,415
Yes	25.8	492
Total	**100.0**	**1,907**

B15.14: Language proficiency

Languages	Proficiency	Percent/ Frequency	A little	Average	Excellent	Good	Unable	Nonresponse	Total
Dzongkha	Speak	Percent	36.6	14.5	2.2	31.2	4.8	10.7	**100.0**
		Frequency	2,227	880	133	1,899	289	649	**6,077**
	Write	Percent	19.7	12.0	0.9	9.4	47.2	10.8	**100.0**
		Frequency	1,197	727	56	571	2,871	655	**6,077**
	Read	Percent	20.6	8.7	0.9	12.5	46.5	10.8	**100.0**
		Frequency	1,254	526	55	762	2,823	657	**6,077**
English	Speak	Percent	14.7	10.2	0.7	8.0	55.5	10.8	**100.0**
		Frequency	896	620	41	488	3,375	657	**6,077**
	Write	Percent	14.6	10.0	0.7	8.2	55.2	11.3	**100.0**
		Frequency	890	609	43	496	3,352	687	**6,077**
	Read	Percent	14.7	8.8	0.7	9.3	55.0	11.5	**100.0**
		Frequency	892	535	44	566	3,343	697	**6,077**

B15.15: Numeracy Skills

Numeracy skills	Percent	Frequency
A little	30.4	1845
Average	20.9	1271
Excellent	1.3	78
Good	13.3	809
Unable	21.8	1324
Nonresponse	12.3	750
Total	**100.0**	**6077**

Annexure B16: Design and Technology

B16.1: Sources of ideas for the textile products

Sources of ideas	Percent	Frequency
Traditional products, designs and style	4.5	276
My own creations	3.4	204
Copying from others and other products	48.8	2,963
Suggestions from family and friends	2.8	172
Suggestions from customers and orders	7.2	437
From master artisans	0.1	4
From the media (TV, magazines, newspapers, etc.)	1.3	76
I don't know	32.0	1,945
Total	**100.0**	**6,077**

B16.2: Level of your interest in creating their own textile designs

Interests in creating textile designs	Percent	Frequency
Not Interested	8.4	511
Little Interested	10.6	643
Fairly interested	16.0	973
Interested	31.2	1,898
More Interested	10.5	641
Most Interested	14.9	904
Nonresponse	8.3	507
Total	**100.0**	**6,077**

B16.3: Opinions on the quality of their textiles comparing with those in the market

Opinions on quality	Percent	Frequency
Better	7.3	446
Comparable	63.0	3,831
Poor	13.2	805
I don't know	16.4	995
Total	**100.0**	**6,077**

Annexure B17: Social Capital and Happiness

B17.1: Reasons for liking to weave/work on their textiles/textile products

Reasons for liking	Percent	Frequency
To continue family tradition	2.0	123
Proud of my culture	16.3	989
People interested in the products	3.9	235
High prestige	10.8	659
Help others	1.5	93
Enhance income and improve living conditions	20.8	1,263
Have a good market demand	2.7	165
Easy to produce	1.0	59
Easy access to raw materials	9.8	596
Interested in making	14.3	869
Self-fulfilment	16.9	1,026
Total	**100.0**	**6,077**

B17.2: Reasons for not liking to weave/work on their textiles/textile products

Reasons for not liking	Percent	Frequency
Low prestige	8.7	4
No market demand	45.7	21
Not interested to continue traditions	19.6	9
Not proud of my culture	4.3	2
Not self-fulfilling	4.3	2
Too much trouble	8.7	4
Unable to weave as our young generations people	8.7	4
Total	**100.0**	**46**

B17.3: Happiness level of respondent weavers

Happiness level	Percent	Frequency
A little happy	4.9	299
Happy	54.3	3,297
Very happy	39.0	2,367
Very unhappy	1.9	114
Total	**100.0**	**6,077**

APPENDIX C: CASE STUDY

The Central Monk Body or Zhung Dratshang spends more than Nu 120 million (M) to procure casual dress (Drigo) for monks and nuns in five years.

This was based on information availed unofficially from officials in the Zhung Dratshang, who said they allocate Nu 3,000 a year to a monk to procure dresses.

There are about 7,500 monks, 300 nuns and 500 gomchens (lay monks) registered with the Central Monk Body today.

Monks and nuns wear maroon robes, which varies in red colour based on the different sect of Buddhism they follow. Some are bright red and others wear dark red. The dress includes sleeveless garments, a large shawl and a skirt inside.

Some monks also wear yellow silks and satins for normal occasions (drigo) and put on sleeveless clothes with brocade for important occasions, which is known as Zango.

Monks and nuns, based on their ranks and positions, also spend about Nu 7,000 to procure dresses of better quality Zango for occasions. While some people offer or contribute Zango sometimes, it is mostly the monks and nuns themselves who buy their own zango.

This means that about Nu 56 million is spent in the five years to buy the zango for about 4,000 senior monks and nuns, who buy the zango once in two to three years.

The official from Zhung Dratsang also said for the monks registered under Zhung Dratshang in Thimphu and Punakha, they buy the drigo from shops in Thimphu that sells monks' robes.

"We don't buy it from one shop but from all the shops that sell the robes," the official said.

But rabdeys (dratshangs in other dzongkhags) bought the robes from stores in Jaigoan and Samdrupjongkhar based on their conveniences before the border gates were closed because of the Covid-19 pandemic. They now buy it either from the shops in Thimphu or in Phuentsholing, Gelephu and Samdrup Jongkhar.

Monks in the rabdeys are also allocated Nu 3,000 a year to buy a set of dress.
In Trongsa dratshang, for about 550 monks, which includes monks and lams in schools and monasteries in the dzongkhag, the fund of Nu 3,000 is allocated from the Zhung Dratshang to buy the dress.

Monks from the dratshang said they initially bought the drigo from Jaigoan but now bought it from shops in Thimphu after the pandemic.

In Zhemgang's Phumethang dratshang in Nimshong, a dress sponsor said he spends about Nu 236,500 a year to buy dress, including kabney for 55 monks. The sponsor said he usually bought the dresses from Samdrup Jongkhar but had to buy from Gelephu this year.

A Thimphu resident, who worked in a civil society organisation, said he sought donations from friends and family members and offered dresses to monks in many dratshangs and private monastic institutions.

He said that he recently offered zango to a monastic institution in Lhuentse where he had to pay more than Nu 7,000 to a set, as it was good quality fabric and silk. "For 35 monks, I spent about Nu 245,000. I bought it from a shop in Changangkha."

He said that for the drigo he offered to monks in private monastic institutions in Wangdue Phodrang and Paro, he only paid Nu 3,000 to Nu 4,000 for a set, which he bought from Gendep Tshongkhangs in the town. "But I am told they also order it from Jaigoan."

A private monastic institution in the east, Rangjung Woesel Choeling Monastery in Rangjung, Trashigang, spends about Nu 1.36 million in five years to procure dresses for 165 monks and materials for prayers flags and other necessities.

According to a senior monk from the monastery, they allocate about Nu 275,000 for clothes and fabrics every year.

Although there are 139 religious organisations registered under the Choedhey Lhentshog or Commission of Religious Organisation, including three Hindu organisations, the total number of monks and nuns were not available, as the commission is still compiling the lists.

RTA

Royal Textile Academy of Bhutan