

A Micro Primary Baseline Analysis of Graphic Design, a creative industry related activity in Bolton Council

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A Micro Primary Baseline Analysis of the Graphic Design Industry in Bolton

The following research was commissioned by the Creative Industries Group, University of Bolton as an element of a PhD project for the purposes of Bolton Council. The study was undertaken by PhD researcher, Isla Johnstone and led by Prof. Simon Roodhouse.

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Introduction

Central to any attempt to collect data, it is essential to define the sub-sector and produce an accurate descriptor of the activities which are evident within.

This is where judgements are needed to reflect the extent of a sub-sector and its activities within the accepted national classification codes such as SIC and SOC, to address the problems of overlap and double counting. To embark upon undertaking sub-sectoral data collection at a micro level, it is essential to question who is being counted to gain accurate coverage for a baseline analysis.

Earlier work on defining the design industry (inclusive of graphic design), produced by The DCMS, ACLC and Eurostat have been used to inform this research; additionally definitions have been sourced from The Design Council and The International Council of Graphic Designers. Comparative analysis of these definitions has formed the definition used by The Creative Industries Group, The University of Bolton for the purpose of this study.

The research is based on primary data collection within the geographical location of Bolton and surrounding wards, and the results provide a contemporary snapshot of the industry within the year ending April 30th 2003. The research provides baseline data for those with a direct interest in graphic design, and is informant to the implementation of economic and social policy.

**A Creative Industries sub-sector:
The changing nature of the graphic design industry.**

Defining the Sector

The SIC/SOC typography of the graphic design sub-sector may be sufficient for generally describing the sub-sector, and is the means to identify any industry for classification purposes within the UK.

Presently graphic design is incorporated within the SIC code **74.87/2, Specialist Design Services**, sharing a code with eleven other design disciplines.

They include,

Graphic Design,

- Boot/shoe Design
- Calico Print Design
- Costume Design
- Fashion Design
- Furniture Design
- Interior Decorator Activities
- Interior Décor Design
- Jewellery Design
- Lace Design
- Textile or Wallpaper Design
- Printing Design

The SIC/SOC approach to classifying the industry is the nationally approved method of categorising industries in the UK, however for statisticians attempting to quantify the creative industries, this method has proved an imprecise tool, due to the fluidity of the creative industry sub-sectors and lack of empirical evidence available to underpin individual activities. What must be questioned is how does this nationally accepted definition of graphic design reflect the nature of activity as outlined by The DCMS in Mapping Documents 1998 and 2001, and more importantly what is understood by the sector.

In the DCMS Creative Industries Mapping Document 2001, Design is identified as one of the thirteen creative industry sub-sectors. Within this definitional framework, the activities described within the design sub-sector is demonstrated within Table One.

Table one. DCMS Creative Industries descriptor for the design sub-sector

Core activities	Related Industries	Related activities	Peripheral Activities
Design consultancies	PR and management	Fine art	Manufacturing
Design component of industry	Consultancy	Graphic design	Research with industry
	Architecture	Fashion design	Modelling and prototype making
		Crafts	
		Multimedia design	

Source *DCMS Mapping Document 2001*

Table one confirms the definition that The DCMS uses to define the design sub-sector. The DCMS Creative Industries Mapping Documents 1998 and 2001 confirm that the main services offered by the Design sector are:

- Corporate ID
- Corporate literature
- Packaging and Branding
- Consumer Literature
- Exhibitions
- Multi-media
- Advertising
- Interiors
- Product
- Retail
- Information Design
- Architecture
- Structural Packaging
- Furniture Design
- TV graphics

As graphic design is classified as a related activity to the design sector there is no definition provided to describe which of the above services are specifically typical to graphic design.

Internationally, it is evident that using nationally accepted classification systems as a framework for measuring the creative industries is an imprecise method of quantifying activity. Furthermore, global recognition of the creative industries as an economic growth sector has stimulated the introduction of classification systems to map the creative and cultural industries. This creates parameters for data collection to measure performance and quantify the economic revenues of the creative industries.

The publication of the LEG report, Cultural Statistics in the EU, produced by Eurostat in 2000, outlined that there was a clear lack of cultural statistics available at EU level. It aimed to provide a framework which defined a common core of fields considered as cultural within the EU, and create a classification system for cultural activities drawing on a framework for cultural statistics defined by UNESCO.

The method used to create this framework was largely pragmatic, sourcing definitions of cultural activity from the national classifications of industrial activity, produced by independent members of the EU. This method was expectedly problematic due to the lack of robust data collection and statistical evidence produced by EU members to underpin and quantify activity within the sub-sectors at a national level.

Within the LEG Eurostat definitions, design is included within the definition of Visual Arts as one of the eight domains within the working framework.

Visual Arts to include:

Visual Arts (incl. **Design**)

Photography

Multidisciplinary

Source: *Eurostat Working Papers. Cultural statistics in the EU*

Using this framework proved highly problematic as each domain was mapped to existing NACE codes. It is worth noting that at this point in time there was no NACE (SIC) code to classify design, and so graphic design remains buried in the undergrowth of a generalised definition of design. The NACE (SIC) code previously referred within this paper was a result of a revision to the four-digit classification system, published in 2003, whereby design was introduced and classified within a five-digit subclass, due to user demand.

The result is that no specific definition of activity within the design sub-sector is classified at EU level. Furthermore, it provides no descriptor of the nature of activities specific to graphic design or any other design discipline.

In Australia, a similar method to that of the UK is used to classify all industrial activity at a national level through a generic classification system. However, in 2001 the Australian Bureau of Statistics introduced The Australian Culture and Leisure Classification system solely to develop and manage culture and leisure data, reconfirming global recognition in the creative industries as an economic growth sector. In this instance, the ACLC provides a useful basis for defining those identified as creative industries in the DCMS UK context, at an international level.

Within this framework the descriptors of activities within the graphic design sub-sector are as follows.

Code 253 – Graphic Design

Graphic design activity

Commercial art services

Ticket writing

Sign writing

The definitions of graphic design sourced from the UK SIC classifications, ACLC, and Eurostat can be viewed collectively in Table Two.

Table Two – A comparative analysis of international definitions of graphic design

The Office of National Statistics <i>Standard Industrial Coding System</i>	The Australian Bureau of Statistics <i>Australian Culture and Leisure Classification codes</i>	EUROSTAT <i>Cultural Statistics in the EU</i>
SIC code 74.87/2 Speciality Design Service, to include Graphic design Boot/Shoe design Calico Print design Costume design Fashion design Furniture design Interior decorator activities Interior décor design Jewellery Design Lace Design Textile or Wallpaper Printing Design	ACLC Code 253 Graphic design to include, Commercial art design service, Graphic Design Service, Sign writing, Ticket writing	Visual Arts to include Visual arts (incl design) Photography Multimedia

It is evident that existing definitional frameworks for classifying graphic design at a national and international level are an imprecise method of accounting for activity within the sub-sector. Although SIC and ACLC do classify graphic design as an activity, neither provide a detailed descriptor of the nature of activities inherent to the discipline.

At national levels the DCMS approach to defining the creative industries provides an imperfect, but workable framework, however clearly lacks understanding of the component industries within the individual creative industry sub-sectors. The need for an alternative approach to defining activity within the sub-sectors becomes sharper when placed in a regional context: that is, the more detail required the greater the disaggregation of the sub-sector. In order to create frameworks to gain accurate coverage of the creative industries on a regional and local level, to implement appropriate policy intervention, the creative industry sub-sectors must be quantified individually, in the form of in-depth analysis of the component industries of the creative industry sub-sectors.

It is particularly evident within *Creative Enterprise Project Report Series: Report 2, Northern Ireland's Creative Industries: A Qualitative Map, March 2001* that using the DCMS definitional framework proves an ineffective method of measuring and mapping the creative industries. Using the DCMS creative industries framework as a starting point, the method used to quantify the creative industries in Northern Ireland was an analysis of the interrelationships between sectors, individuals and organisations. The aim was to arrive at definitions of creative enterprise that

accurately reflected the current position of creative industry businesses which could potentially be incorporated into future developments.

With reference to the design sub-sector, the result of this approach was that no coherent understanding of which activities were specific to individual design disciplines was gained. Therefore there was no improvement in the definition of the design sub-sector established by the DCMS creative industries framework. Furthermore, the report confirmed that there was no robust data to support market size and revenues, or the size of the design sector in Northern Ireland. Data was produced relating to clustering and interrelationships between design disciplines, however we must question the accuracy of this research as no initial definitions of individual design industries was undertaken to describe their individual activities.

An alternative definitional concept for the UK graphic design sector is that offered by The Design Council, the UK's primary support agency for design. The activities within this definition are provided by graphic design practitioners and businesses sourced through survey research undertaken by The Design Council and The British Design Initiative. The definition is entitled **graphics communication** and includes the following activities,

Typography
Illustration
Packaging
Corporate Identity
Magazine Design
Television and Video Graphics
Digital/New Media Graphics

This consultative, practice based methodology provides a more representative definition of activities within the sub-sector.

The International Council of Graphic Designers (ICOGRADA) is the professional world body for graphic design and visual communication. It is the voluntary coming together of associations concerned with graphic design, design management, design promotion and design education and approaches defining graphic design in terms of activity relative to the occupation of the designer, as opposed to defining them as businesses.

ICOGRADA states that the graphic designer is,

“One who has the artistic sensibility, skill and experience and/or training professionally to create designs of images for reproduction by any means of visual communication, and who may be concerned **with illustration, typography, calligraphy, surface design for packaging, or the design of patterns, books, advertising and publicity material, or any form of visual communication.**”

Source *ICOGRADA 2004*

As a starting point, this description is useful when trying to understand the occupation of the graphic designer and indicates the activities undertaken to achieve the role. This descriptor also provides a useful comparison to that of the national descriptor of occupations produced by the ONS within Standard Occupational Coding System.

SOC describes the occupational role of the graphic designer as

Code 3421 Graphic designers, to include

Designer Graphic

Designer Multi-media

Designer Web

Designer Typographical

Designer Exhibition

Designer Advertising

A comparison of the DCMS, The Design Council, ICOGRADA and ONS (SOC) is found in Table Three.

Table Three - Graphic Design Industry and Occupation Descriptors

The Department of Culture, Media and Sport	The Design Council	The Office of National Statistics <i>Standard Occupational Coding System</i>	The International Council of Graphic Design
<p>Core activities</p> <p>Design consultancies Design component of industry</p> <p>Main services include</p> <p>Corporate ID Corporate literature Packaging and branding Consumer literature Exhibitions Multimedia Advertising Interiors Product Retail Information Design Architecture Structural Packaging Furniture design TV graphics</p> <p>Related activities Graphic design Fine art Fashion design Multi-media design Crafts</p>	<p>Graphic Design is included in Graphic Communication sector And includes the following activities,</p> <p>Typography, Illustration, Packaging, Corporate Identity, Magazine design, Television and video graphics, Digital/new media graphics</p>	<p>SOC code 3421</p> <p>Graphic Designers, to include, Designer Graphic Designer Multi-media Designer Web Designer Typographical Designer Exhibition Designer Advertising</p>	<p>Graphic design is an intellectual, technical and creative activity not simply concerned with the production of images with the analysis, organisation and methods of presentation of visual solutions to communication problems.</p> <p>Activity includes Illustration Typography Calligraphy Surface Design for Packaging or the design of patterns, books, advertising, and publicity material or any form of visual communication</p>

A common understanding and descriptor of activity for the Graphic Design Industry is clearly not available at national or international levels. Comparing the descriptors of those provided by The DCMS, ONS SOC, The Design Council and ICOGRADA provides a more detailed methodology to defining this activity. It is evident that the definitions from ICOGRADA and The Design Council, sourced using a practice-based consultative methodology, provides a representational account of activity derived from the sector.

Furthermore, there are commonalities between these definitions and those sourced from the ONS SOC, these are highlighted in Table Three.

Prior to forming a solution to defining the activity within the graphic design industry, it is equally important to include the following factors and their role within graphic design activity:

- Technology plays an essential role in the graphic design sector as a method of production and delivery in an electronic industry.
- The design industry includes capabilities outside of production, such as consultancy services generated through creative thinking tendencies

Upon this basis, the Creative Industries Group, The University of Bolton have formed a solution to quantify the activities within the graphic design sub-sector. This is based on the commonalities of activity evident within the reviewed definitional frameworks with an inclusive approach to consultancy and web design. Graphic Design therefore includes the following activities

Corporate identity
Branding
Total Advertising Solutions
Marketing and Promotion Services
Illustration
Printed Literature
Packaging
Consultancy
Web design

This definition has been applied to the primary data collection exercise in the Bolton Council area.

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Results

Five areas of organisational activity, as referred to in the research methodology, have provided the framework for the analysis of the data captured. They are presented in the following sections.

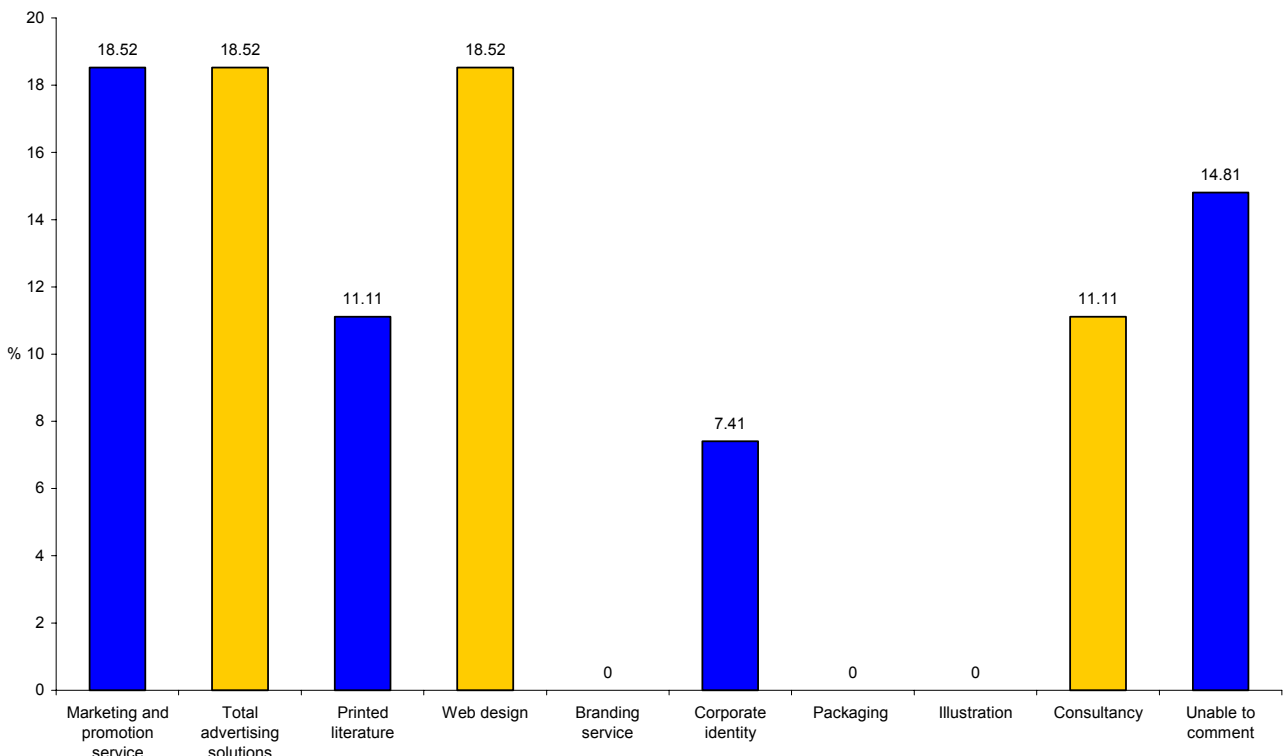
- A detailed analysis of the organisational profile, resources, investments and development issues of the graphic design businesses in Bolton
- Geography and markets for graphic design businesses in Bolton
- A profile of training activities within graphic design businesses in Bolton

A detailed analysis of the organisational profile, resources, investments and development issues of the graphic design industry in Bolton.

This section considers the organisational nature, resources and development issues of the graphic design businesses in Bolton.

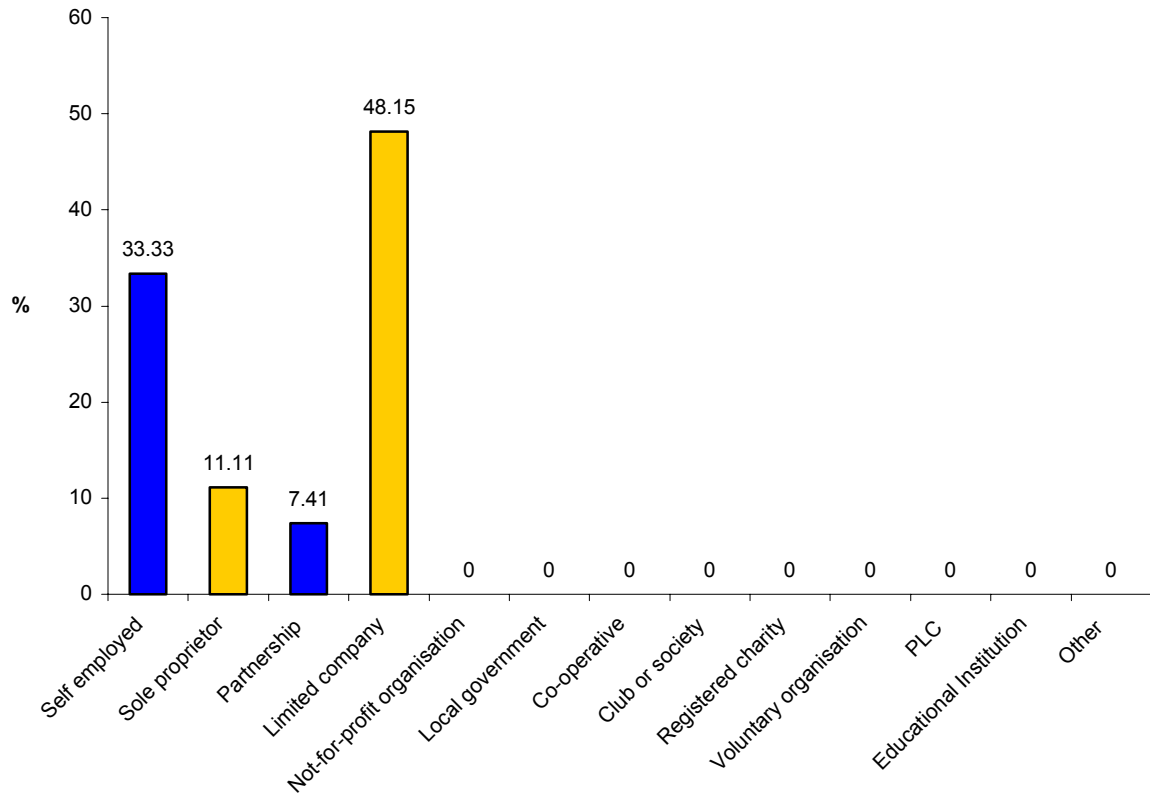
The typography of businesses as defined by creative activity within the graphic design sub-sector is extremely diverse, with graphic design businesses specialising in a range of creative activities that constitute their main activity. These are described in Figure One. It is clearly noted that based on the definition of activity within the graphic design sector, as defined by Roodhouse and Johnstone earlier in this report, none of the companies included in the sample stated that they considered Branding, Packaging or Illustration to be their main area of creative activity. Additionally 14.81% of the sector was unable to state that they had one particular main area of creative activity, and confirmed that they produce work in numerous areas.

Figure One – Defining the main area of creative activity of Graphic Design Businesses in Bolton



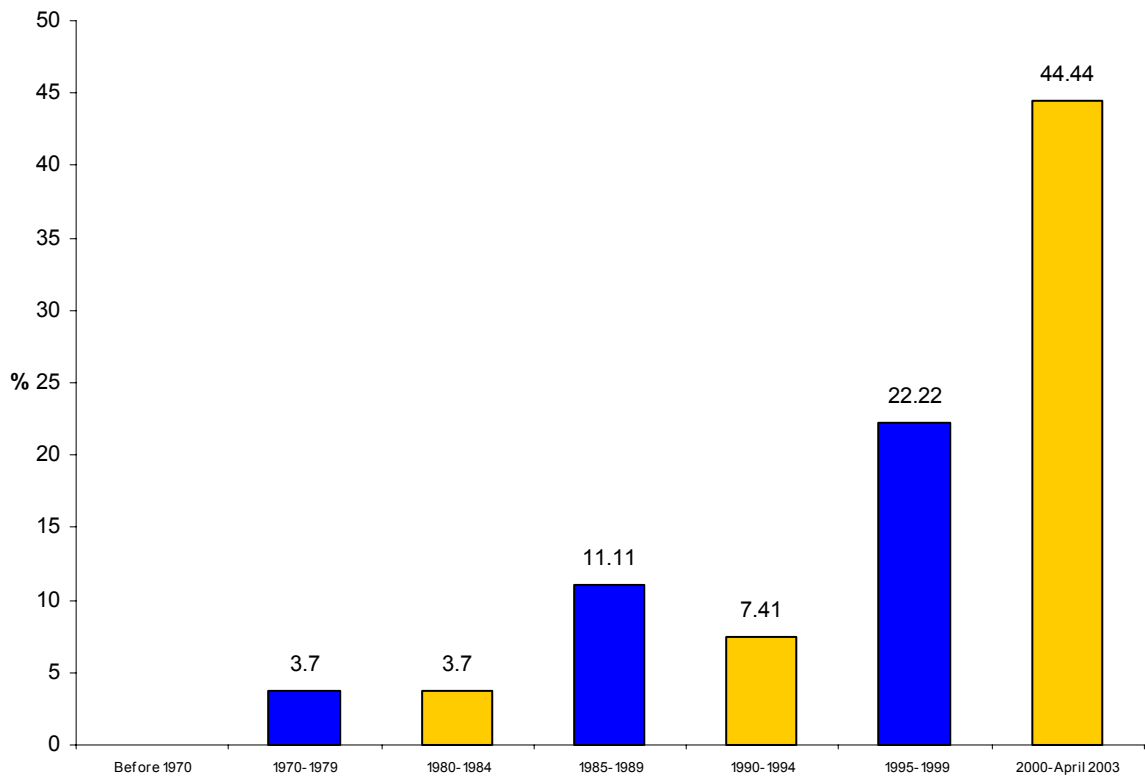
The typography of enterprises is primarily dominated by Limited Companies (48.15%), with a substantial number of Self-Employed Individuals (33.33%). There are few Sole Proprietors (11.11%) and Partnerships (7.40%).

Figure Two – The typography of graphic design enterprises in Bolton



The longevity of the graphic design businesses included in the sample is variable, however there is a greater density of companies that were established between 2000 and 2003 (44.44%), doubling the number of businesses established between 1995 and 1999 (22.22%). Perhaps this is a reflection of the national growth in all creative industry businesses and government led support strategies in the North West, introduced to develop creative industries at a local and national level.

Figure Three – Describing the longevity of businesses



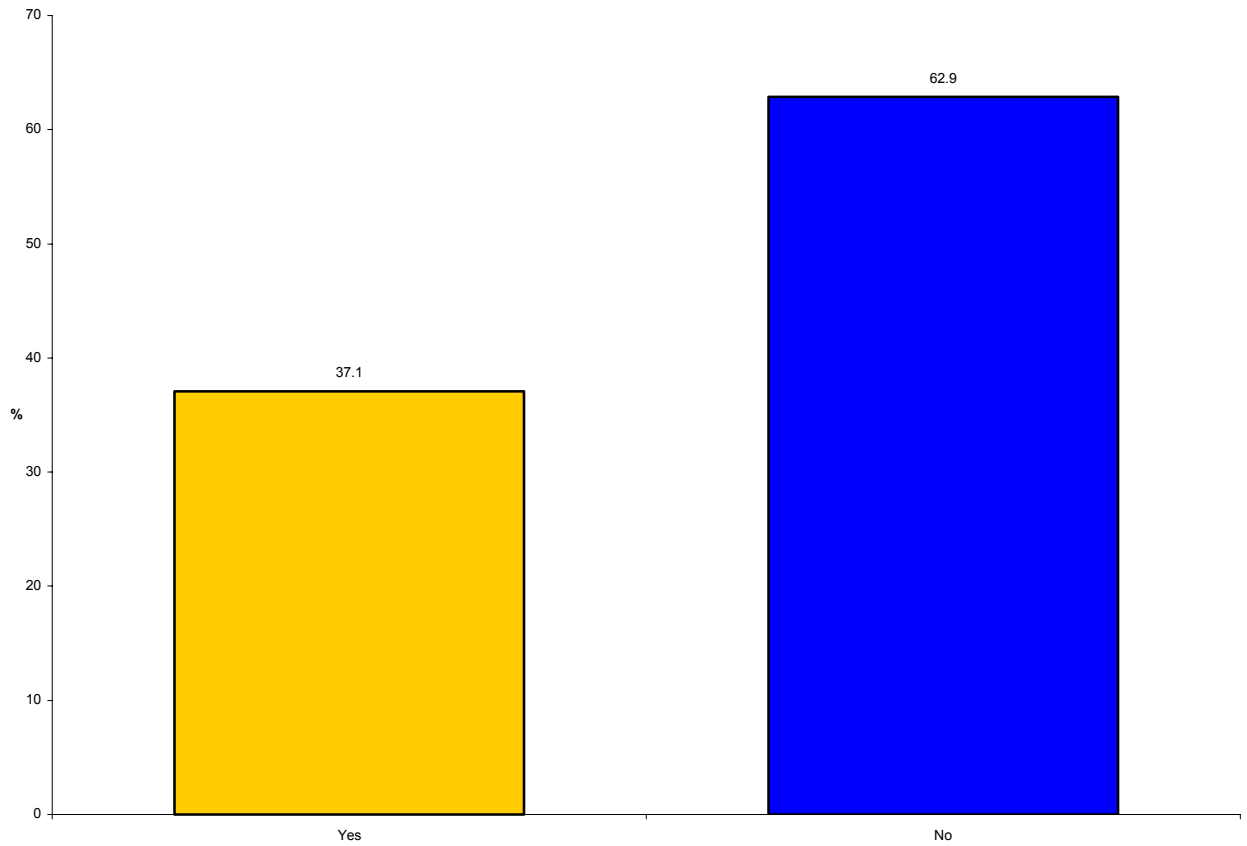
The number of graphic design businesses that do or do not employ full-time staff is almost evenly distributed within the sector, with 48.15% of graphic design businesses employing staff and 51.85% who do not.

Table Four – Percentage of companies that employ staff

Percentage of companies that employ staff	Percentage of companies that do not employ staff
48.15%	51.85%

Of the total number of companies that do employ staff, 37.1% of employees are hired with a contract of employment and 62.9% are not.

Figure Four – Percentage of companies that hire staff with a contract of employment



Those companies who do employ staff however, generally employ fewer than 5 people (69.23%). Only one company in the total sample proved to be employing between 20 to 50 members of staff, confirming that the graphic design industry in Bolton is completely dominated by micro and small sized enterprises. Further details are presented in Figure Five.

Figure Five – Number of full-time staff employed by companies

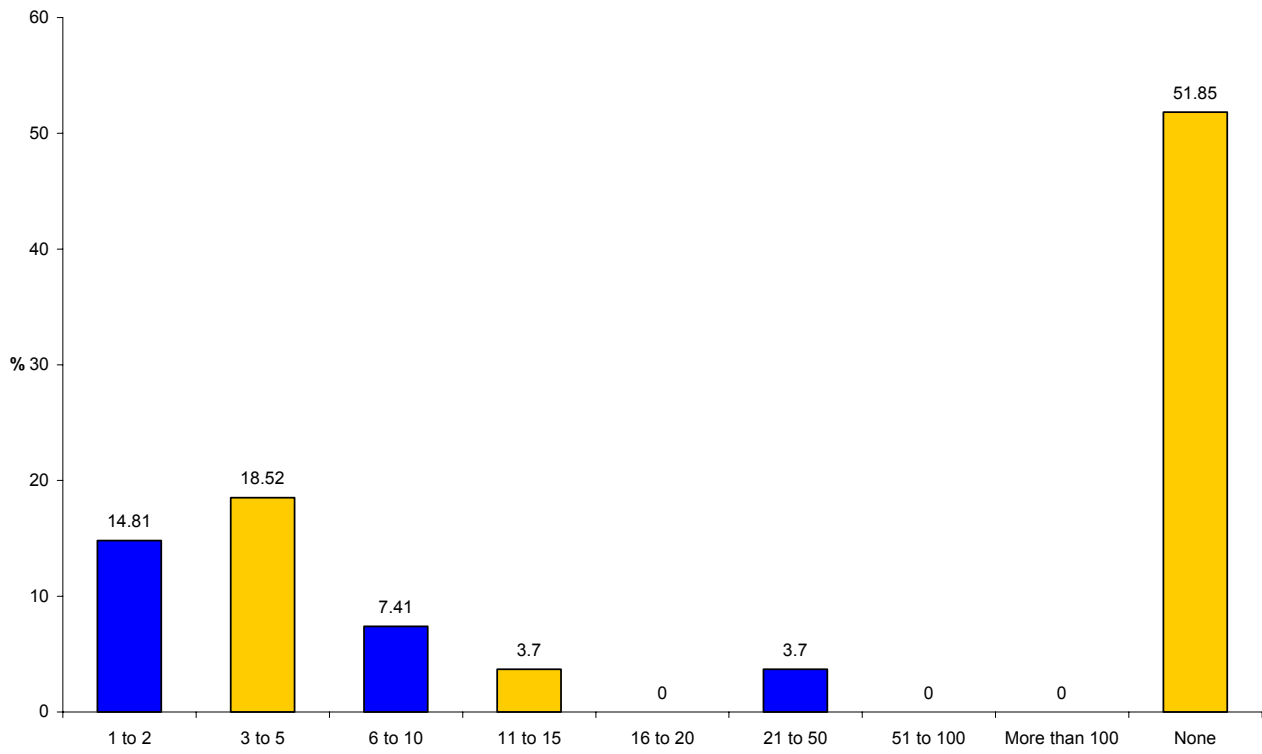
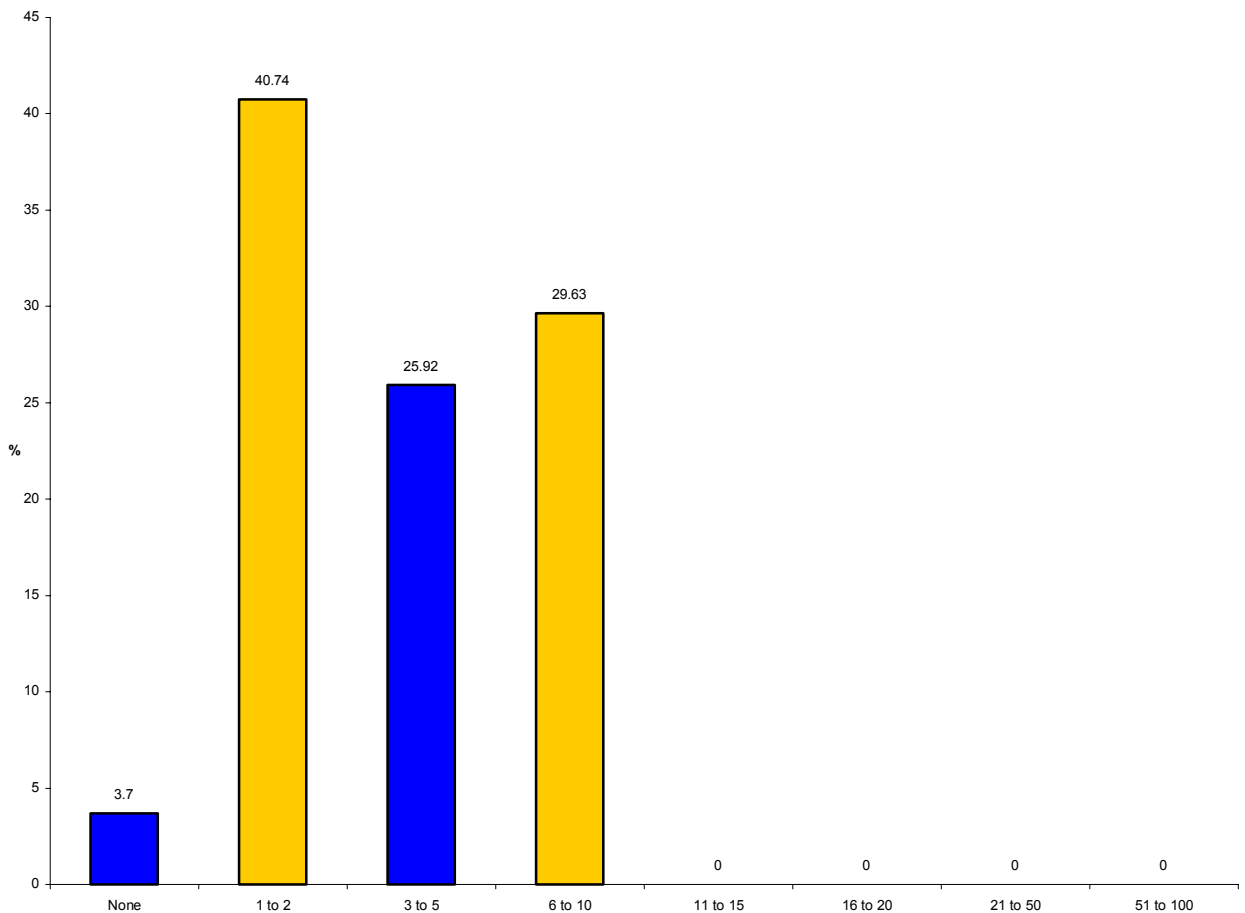


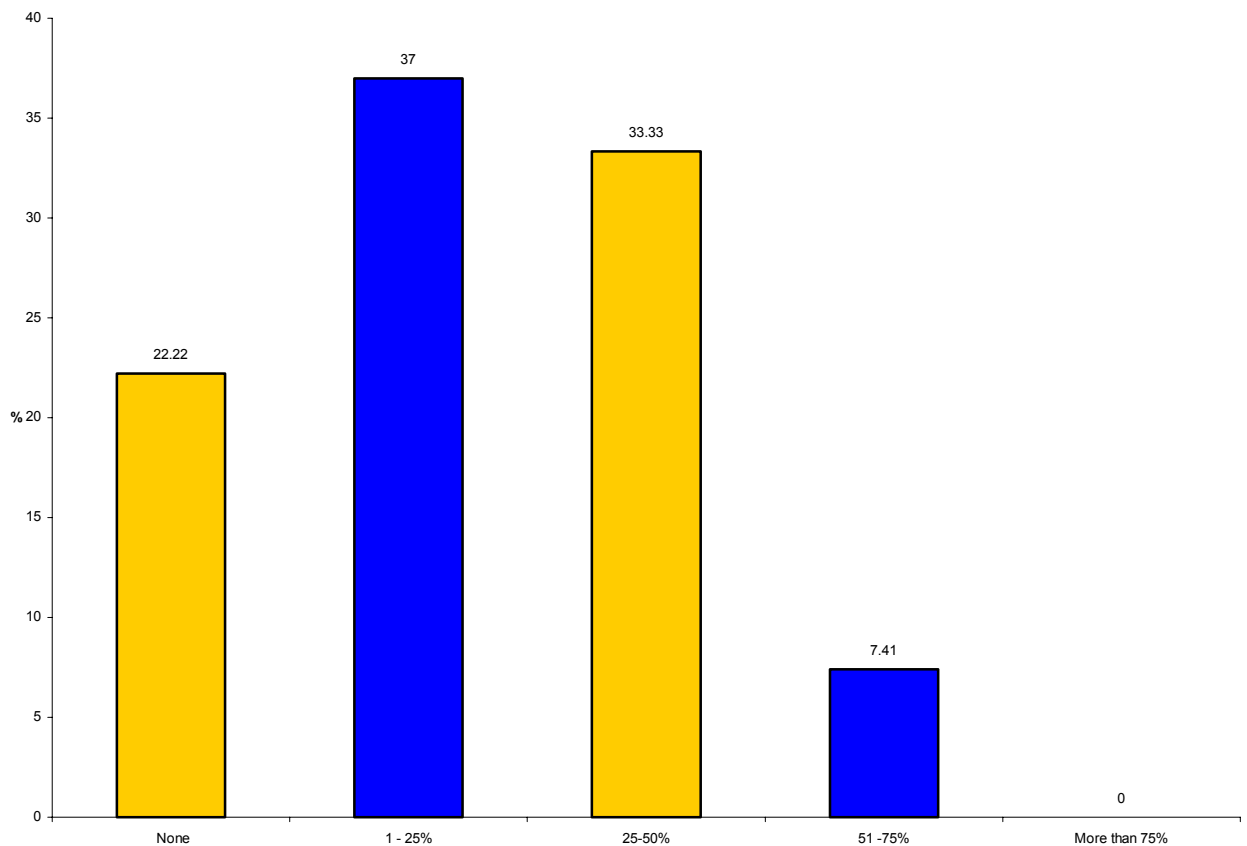
Figure Six – Number of staff employed on a contract for services basis



It is worth considering however, that despite just over half the sample (51.85%) stating that they do not employ full-time staff, the majority of the total sector employs staff (96.3%) on a freelance or contract bases for services. It can therefore be concluded that hiring staff on an “as and when needed” basis, is a popular way to access industry related skills that are not readily available in-house. The number of employees hired on a full time basis ranges from 1-2 (40.74%), 3-5 (25.92%) and 6-10 (29.63%).

The pattern of female employment in the sector is reasonably low with a disaggregated total of 92.59% of the companies’ sampled employing fewer than 50% of women in their total workforce. With regard to the working patterns of female staff employed solely, on a part-time basis there is equal distribution within the sector.

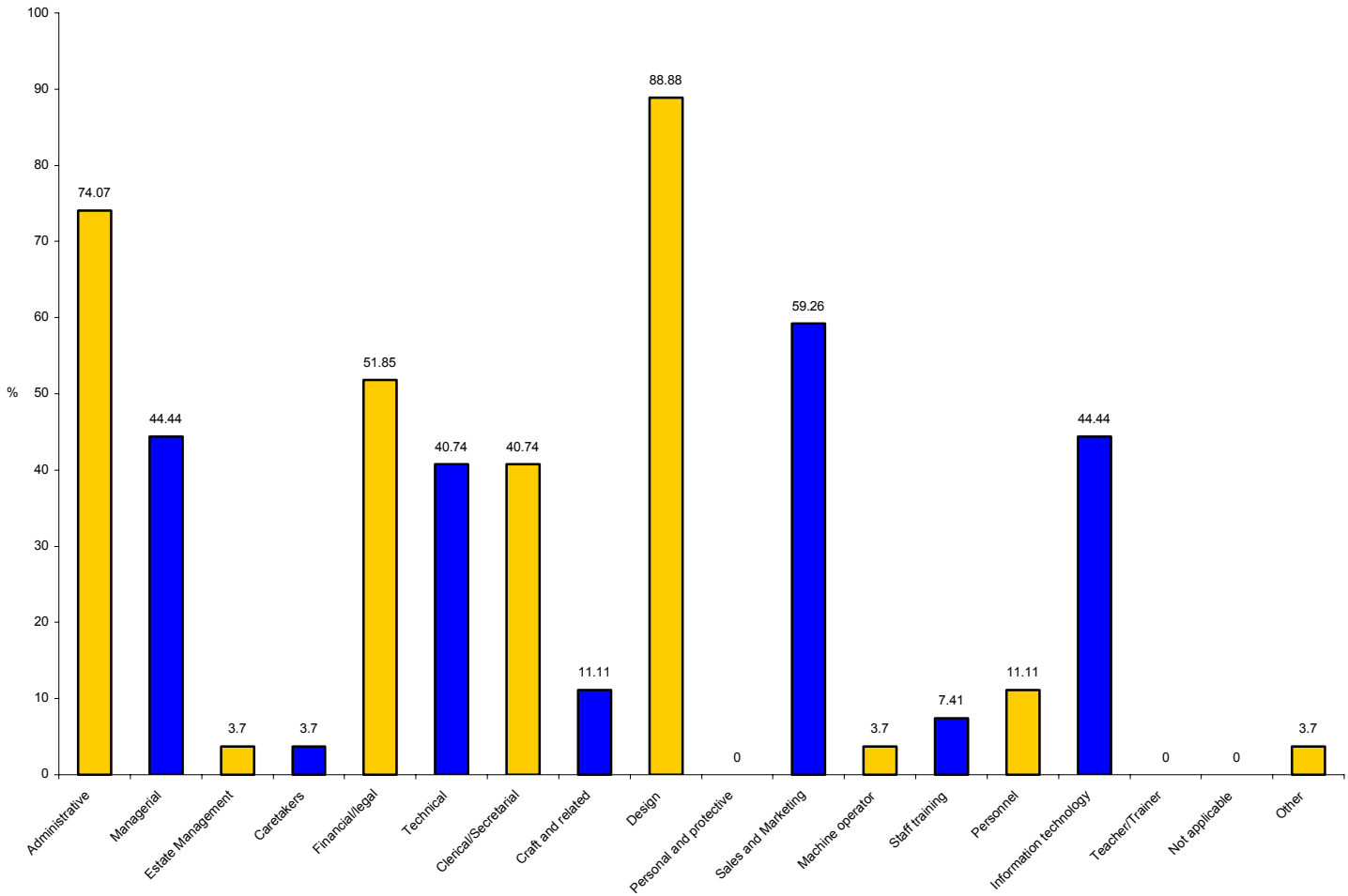
Figure Seven – Patterns of female employment



The number of voluntary staff employed by graphic design businesses is nil. Further investigation is needed to reflect the reasons for this in order to establish a strategy to develop voluntary opportunities within the sector. This trend is replicated in the number of companies employing staff with Identified Special Needs.

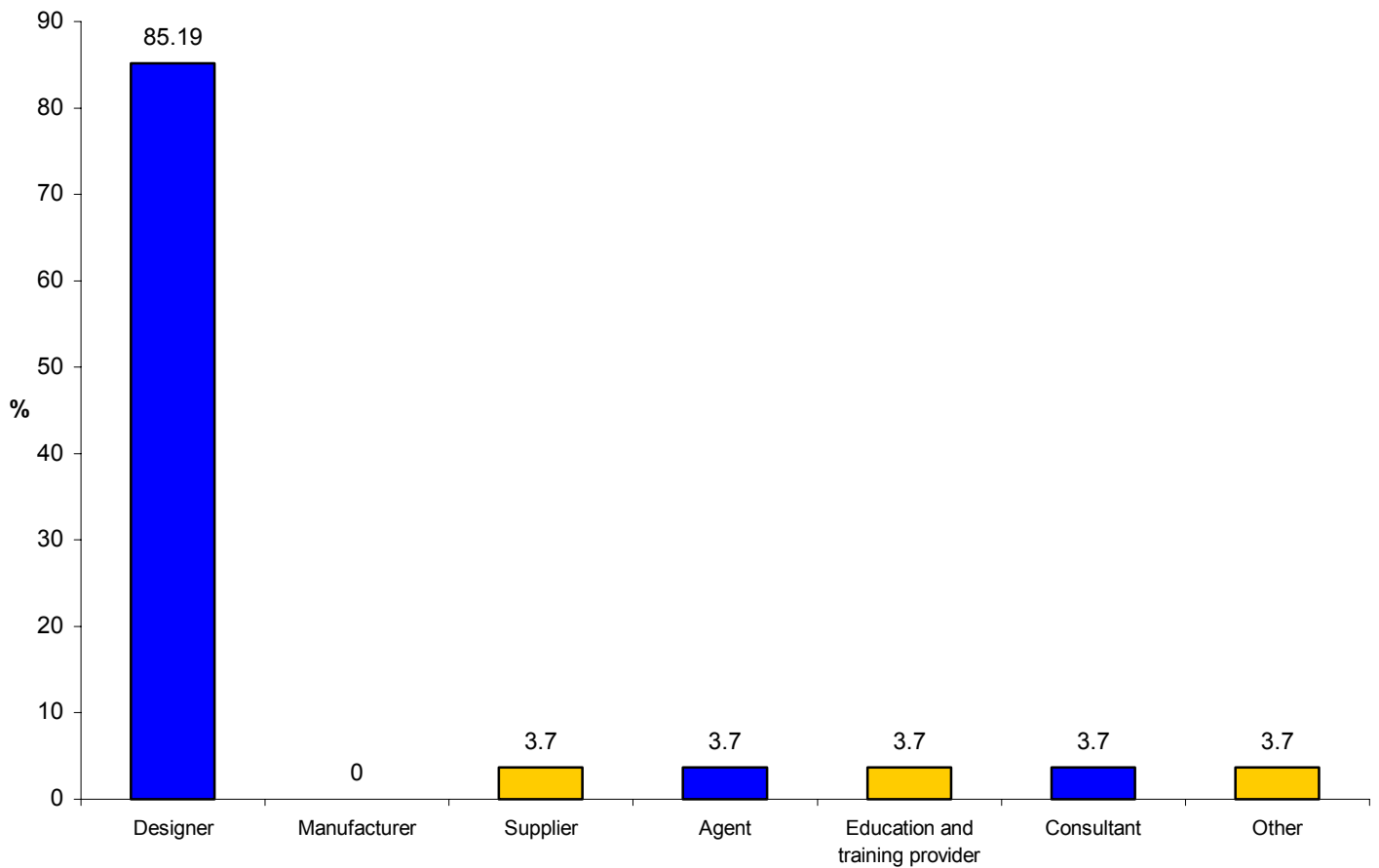
The different job roles evident in graphic design businesses are diverse, however it is clear that a high proportion of the sector considers Administration, Financial & Legal, and Sales & Marketing to be main roles in addition to creative and technical roles. A complete description of all of the roles undertaken collectively by the graphic design businesses in Bolton is presented in Figure Eight.

Figure Eight – Roles undertaken by graphic design companies in Bolton



Based on a standard definition of functions, which includes Design (creativity), Manufacturing (making), Agent (funding agent or gallery), Education / Training Provider, (Further/Higher/Private sector) and Consultants, an indication of supply chain positions is evident. Unsurprisingly, as this research focuses on the graphic design industry, design is the most prominent function provided by the sector (85.19%).

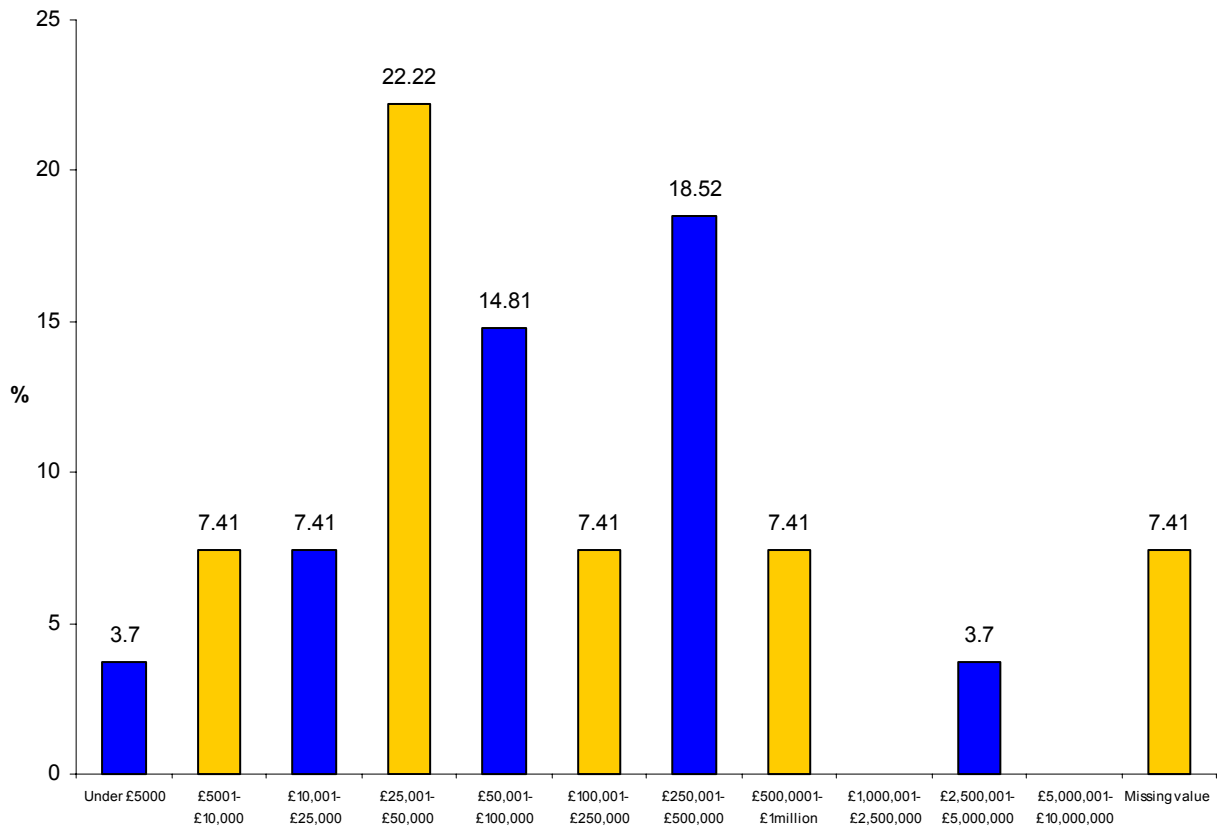
Figure Nine – Supply chain positions of graphic design companies in Bolton



The total income profile within the graphic design industry in Bolton is lucrative, with 22.22% of companies with an annual turnover of between £25,001 and £50,000, and a further 18.52% ranging between £250,001 and £500,000. A detailed explanation of annual turnover is presented in Figure Ten.

Further work is needed to reflect the true correlation between annual turnovers against the number of staff employed and financial investments within individual enterprises.

Figure Ten – Annual income profile for graphic design companies in Bolton



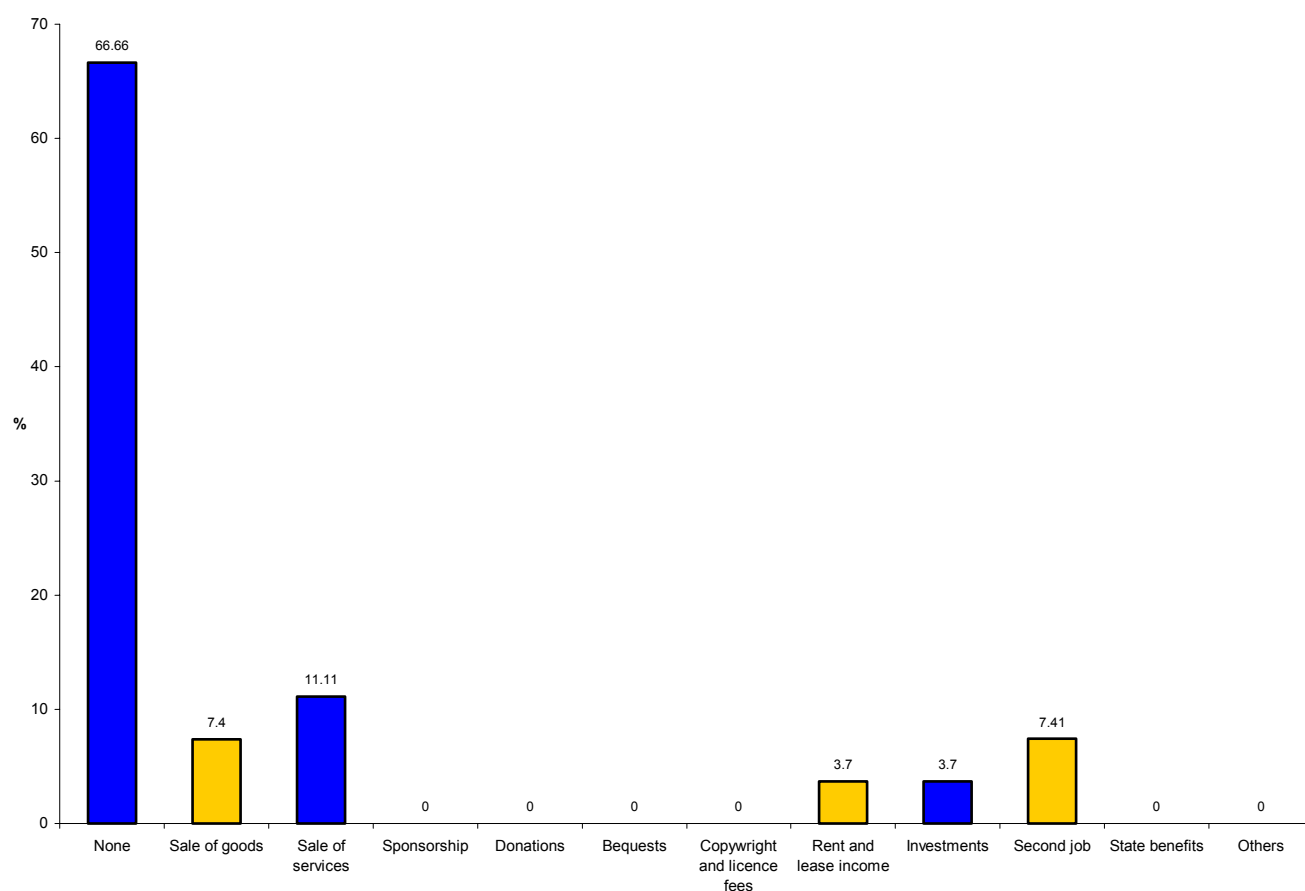
However, the overall pattern of movement of income indicates that the graphic design industry in Bolton is a growing sub-sector, with 74.1% of the sample experiencing an increase in annual turnover.

Table Five – Movement of Annual Income

Movement of income	Percentage of companies
Rise	74.1%
Fall	7.4%
Stay the Same	11.11%
Missing Value	7.4%

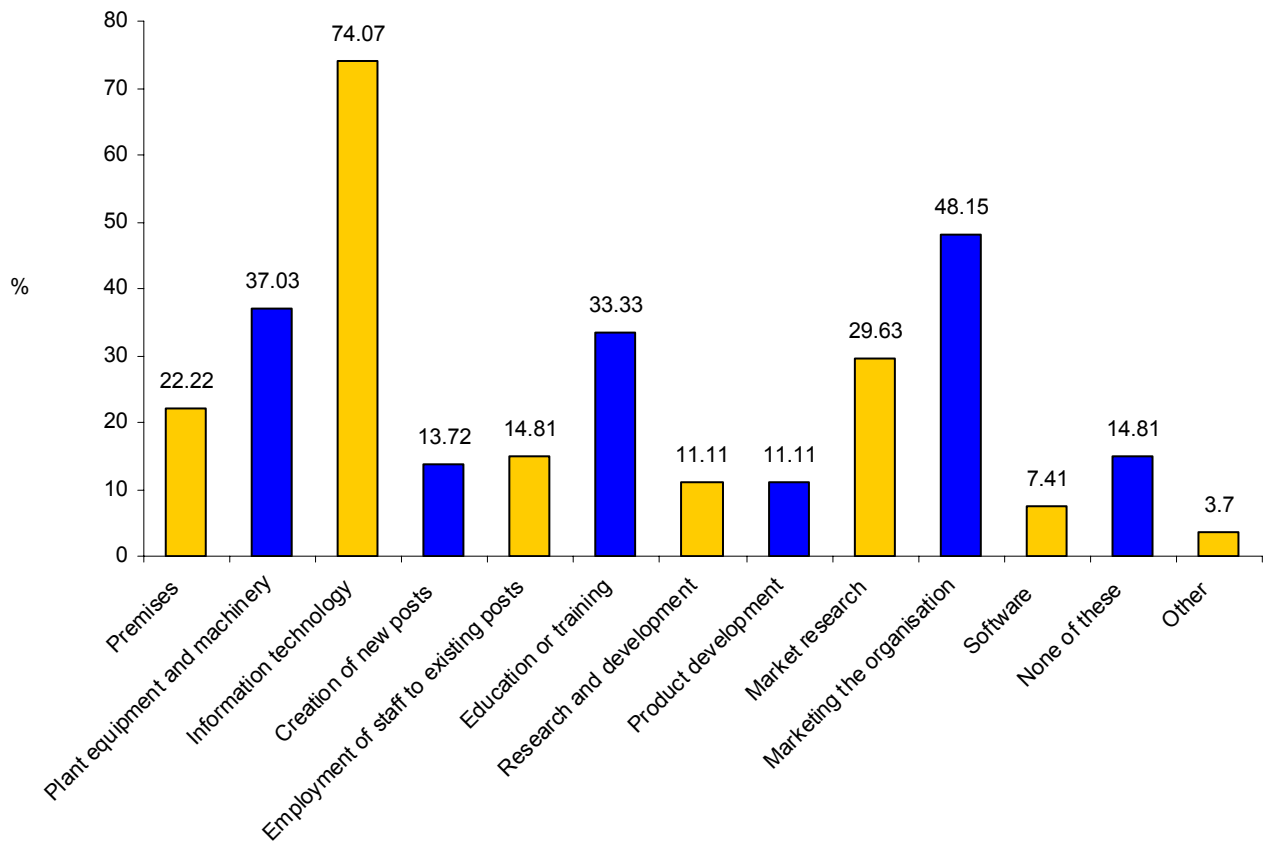
Graphic Design businesses in Bolton primarily survive through the sale of their main activity, which is design (66%). Aside from the main trading activity, other sources of income for the graphic design businesses in Bolton are inconsistent and show no definable pattern. As 66.66% of the sector do not have any other sources of income, and the remaining businesses receive income from the Sale of Other Services (11.11%), Sale of Goods (7.41%), Second Job (7.41%), Rent and Lease Income (3.71%) and Investments (3.71%).

Figure Eleven – Other types of income



With regard to financial investments, the range of priorities is dispersed, however the greatest investment has been made into Information Technology (74.07%). This is expected within an industry that produces graphic design solutions through the use of computer technology. Marketing the organisation also proved to be a priority to 48.15% of the graphic design businesses included within the sample.

Figure Twelve – Financial Investments



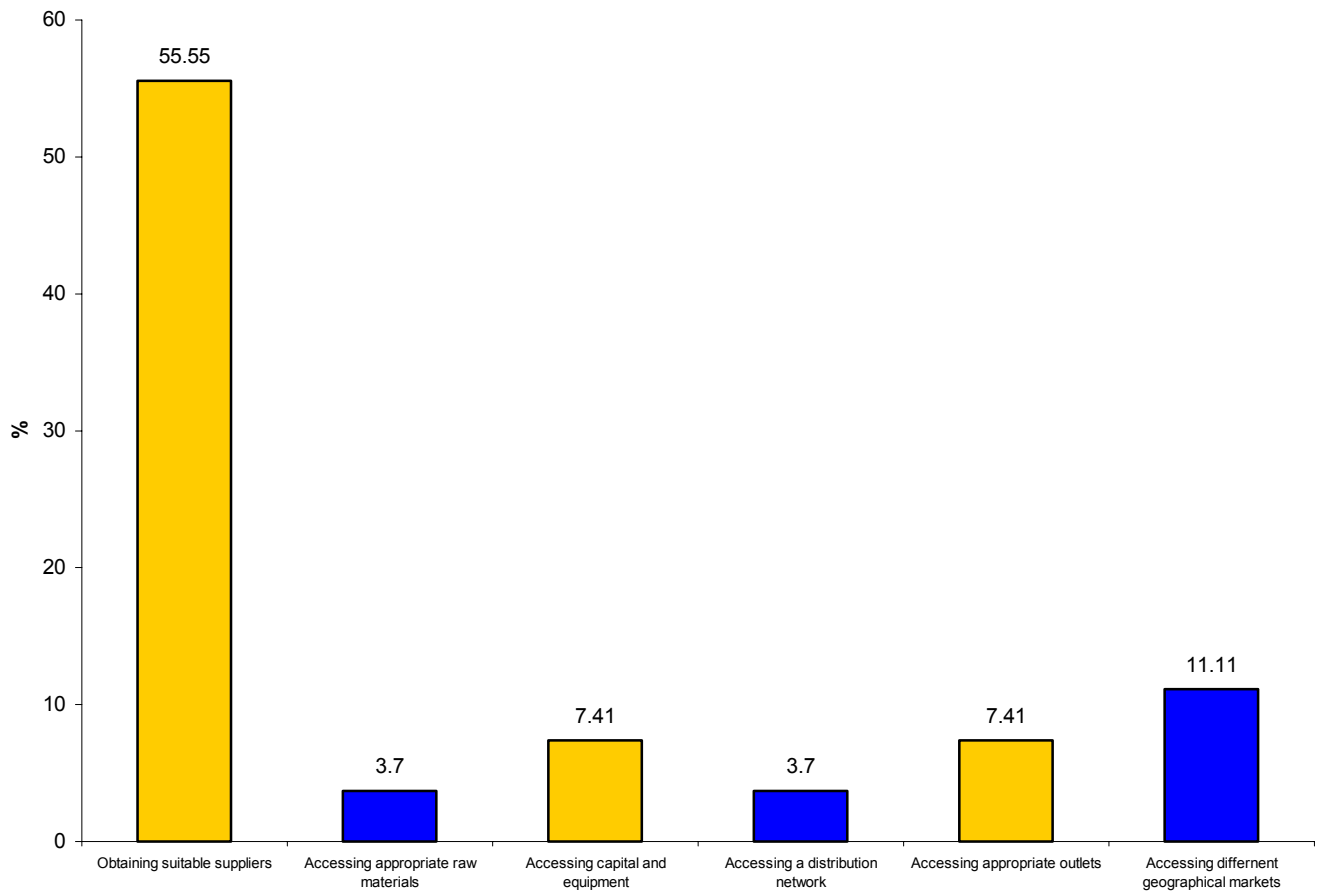
Issues of most concern to graphic design businesses in Bolton are: Finding new customers (55.55%), and Customer Retention (37.04%). Promoting the organisation is also a priority to 40.74% of the sector, which is reflected in the investment priorities of the companies.

Table 6 – Development Issues

Development Issue	Percentage of the total sector experiencing the issue
Finding Funding	11.11
Economic Climate	14.81
Suitable Premises	25.93
Promoting the Organisation/Products	40.74
Retaining Customers	37.04
Finding New Customers	55.55
Recruiting Staff	18.52
Recruiting Trained Staff	14.81
Using Information Technology	11.11
Competitors	11.11
Making contact with suitable networks	22.22
Availability of suitable staff training	14.81
Availability of trained staff	11.11
Crime	0
Local Authority policies	3.7
Reduction of Local Authority Support	3.7
National Government Support	7.41
None	3.7
Other	7.41

The problems which graphic design businesses in Bolton stated they experienced most when surveyed are presented in Figure Thirteen. Although there are a range of problems experienced by some of the sector, obtaining suitable suppliers is of concern to 55.55% of graphic design businesses included in the sample. This figure is significantly high and indicates that the demand chain generated by the graphic design industry in Bolton is unsatisfied. Further mapping of supply and demand chains between businesses is required to fully understand the types of suppliers that are required by the graphic design industry and stimulate a means to forge partnerships and links to access services in demand.

Figure Thirteen – Problems experienced by the sector



Of the graphic design businesses included in the sample only 18.52%, which represents 5 graphic design businesses in Bolton received grant subsidies. This is significantly low and indicates that the industry is thriving based on the sale of services as opposed to being subsidy dependent.

With regard to those companies who have received income from grant subsidies, the local authority has provided 80%, with a further 20% provided by the Regional Arts Council.

Figure Fourteen - Proportion of sector in receipt of grant income

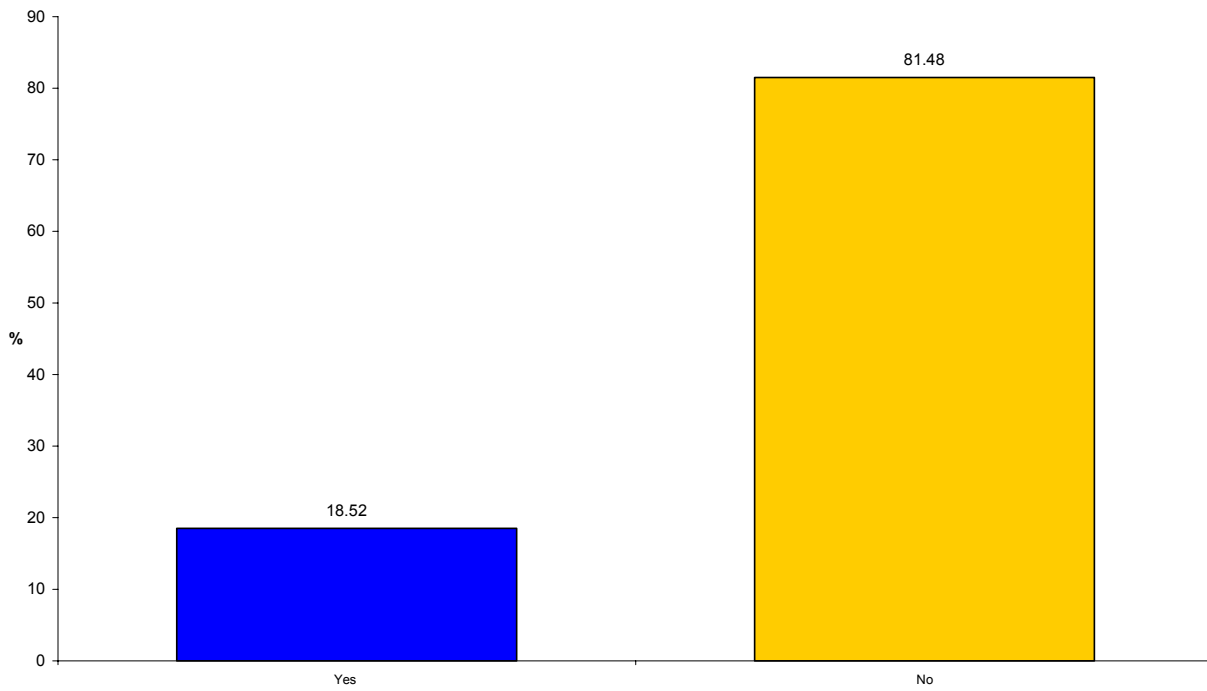
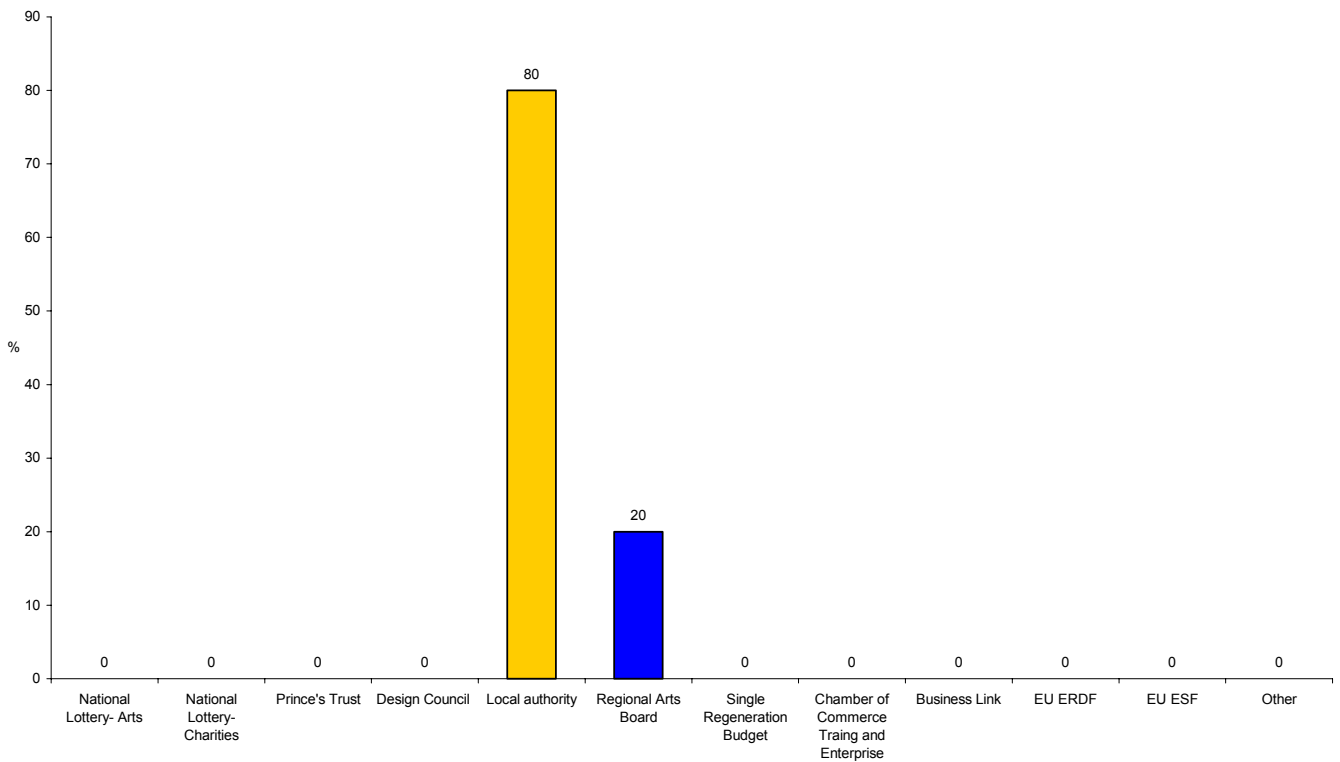
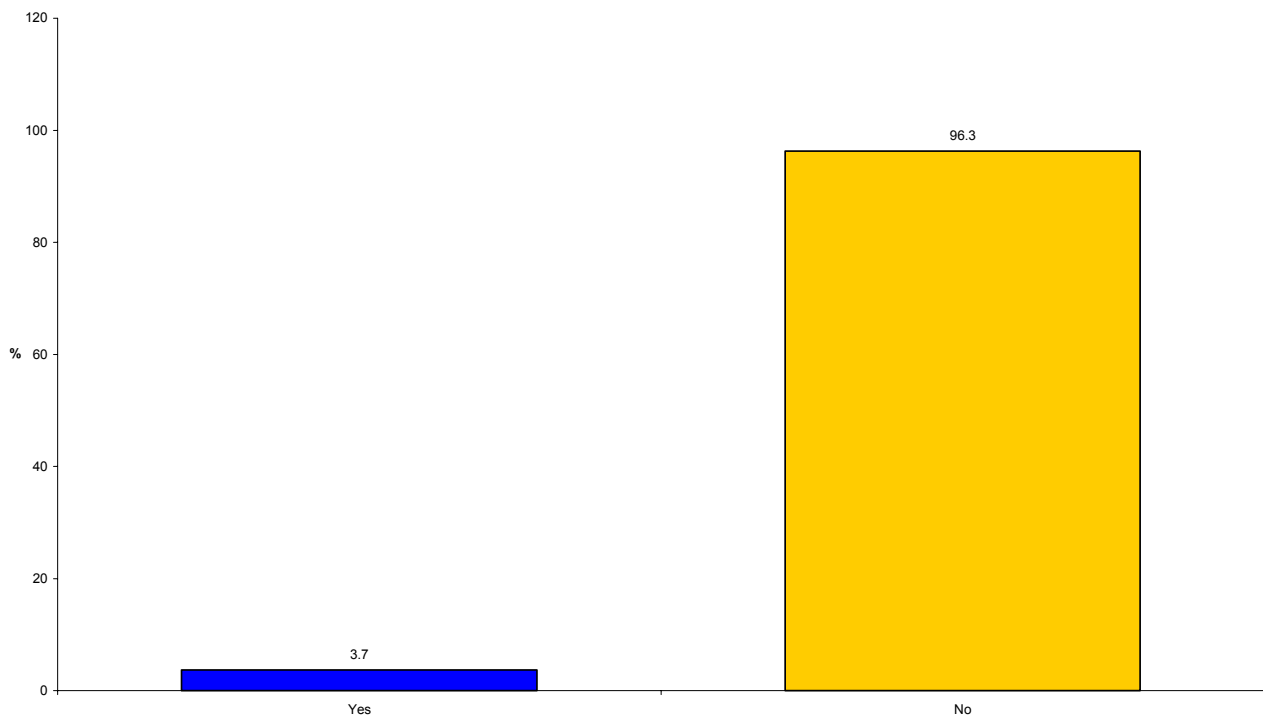


Figure Fifteen – Sources of grant income support



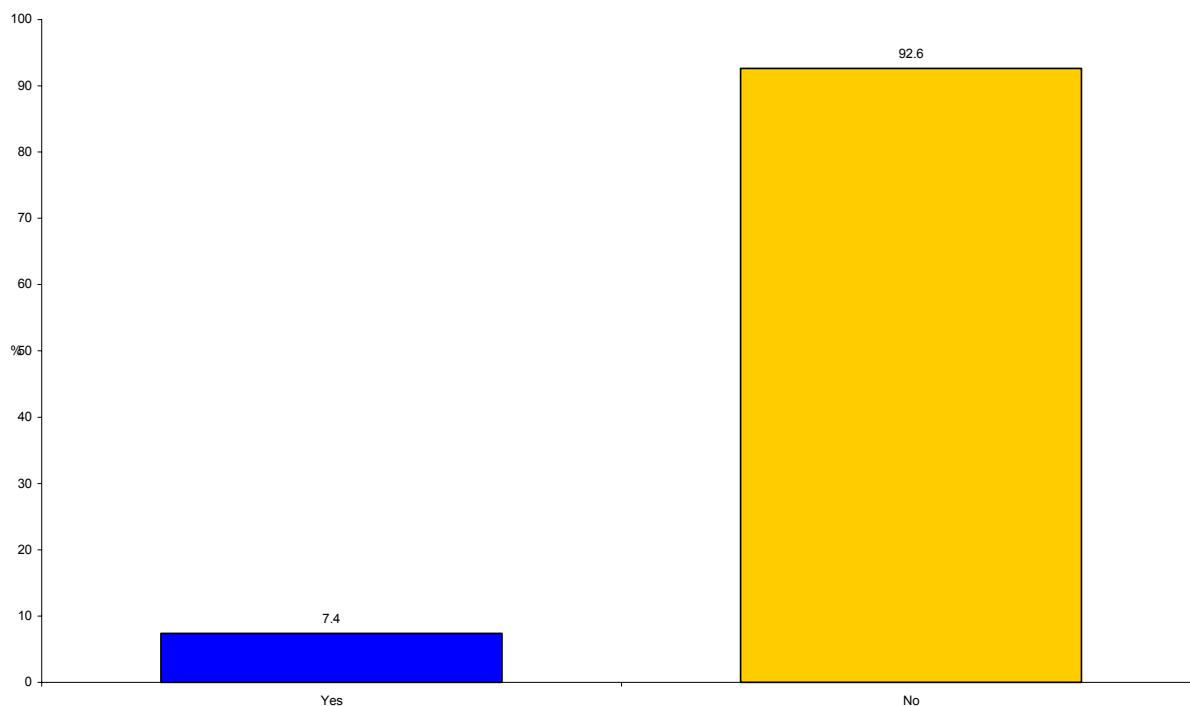
Financial sponsorship for the sector is also significantly low, with only one business (3.71%) receiving any type of financial sponsorship, provided by a private business.

Figure Sixteen– Proportion of sector in receipt of financial sponsorship



Similarly, the number of graphic design businesses in Bolton receiving services in kind is particularly low (7.41%), equally provided by a Public Funded Body and the Local Authority.

Figure Seventeen – Percentage of businesses that receive services in kind



Business support is provided to 41.6% of the businesses included within the sample, by a range of providers. These include Business Link (40%), Local Authority (30%), Chambers of Commerce (20%), Banks (20%) and Training Enterprise Council (10%). In the main, 90% of those businesses in receipt of business support stated that they considered it to be satisfactory. Although the number of businesses in receipt of business support is low, further work is needed to reflect the engagement between business support agencies and the typography of businesses to explain this.

Table Seven – Percentage of companies in receipt of business support

Position of receipt	Percentage of companies
Yes	41.66
No	66.66
Missing value	3.7

Figure Eighteen – Organisations used to provide business support

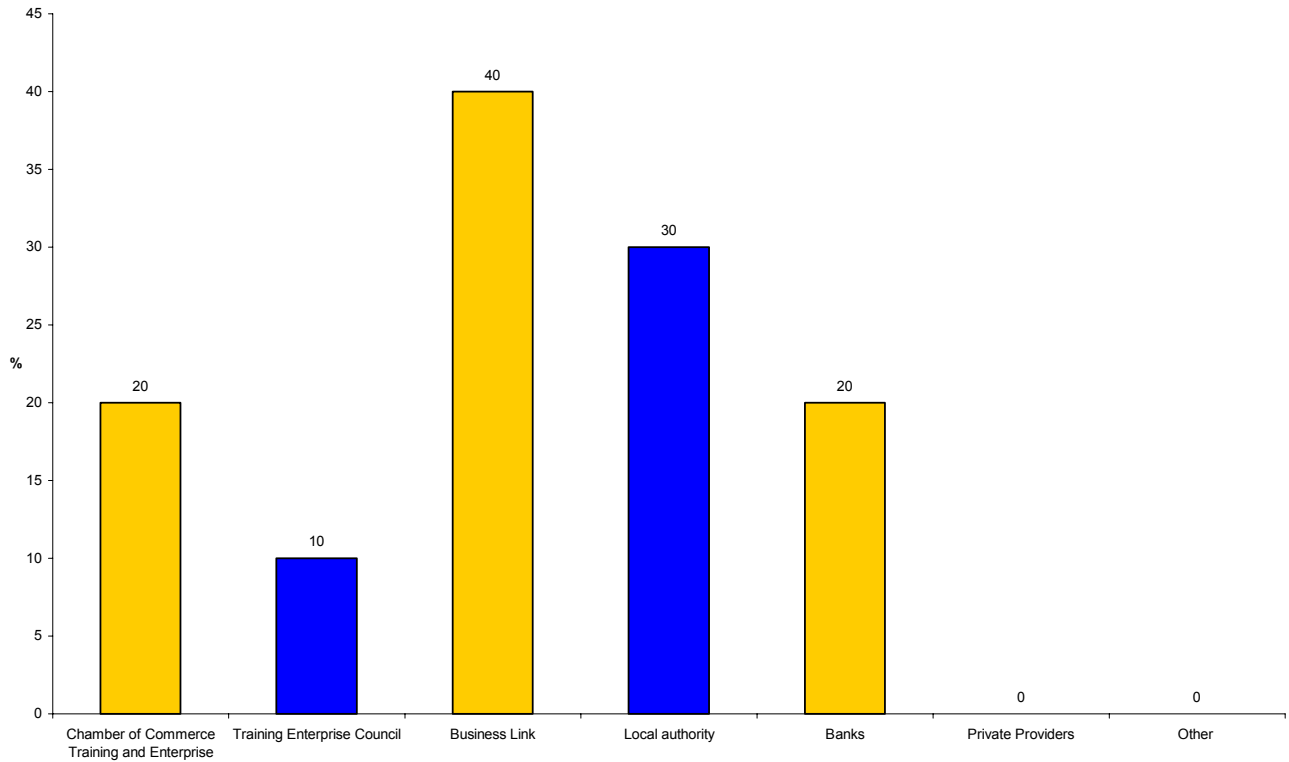
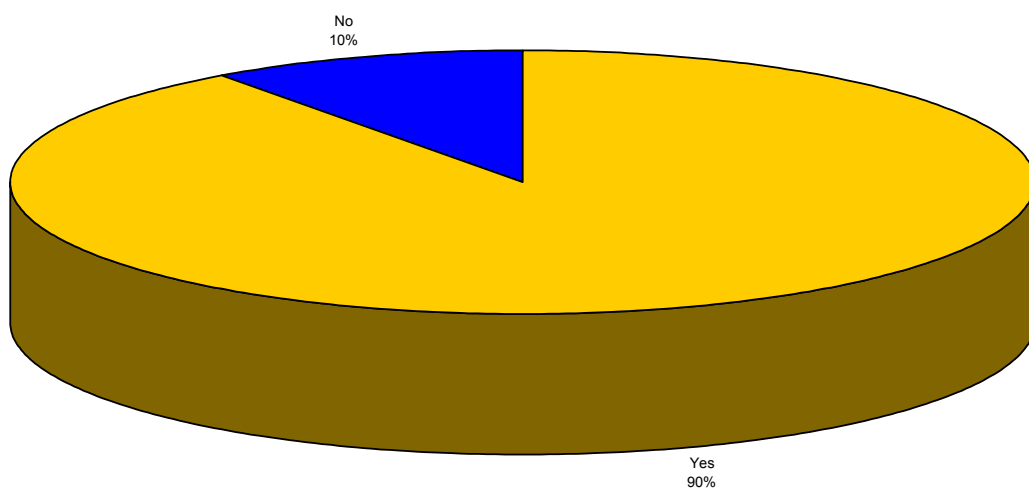


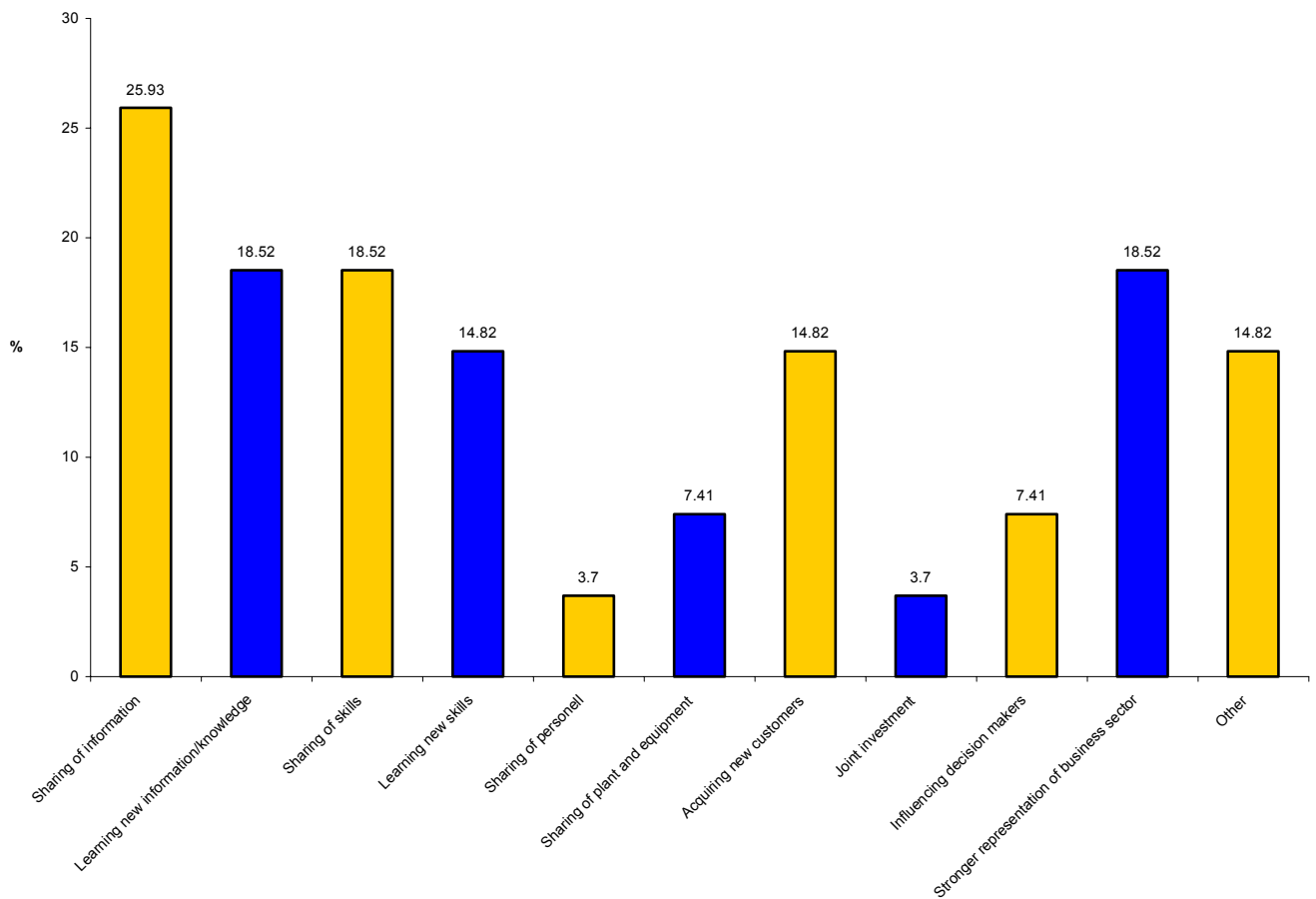
Figure Nineteen – Business Support Recipient Satisfaction



Geography and Markets for Graphic Design Businesses in the Bolton location

Over half of the sample (55.55%) positively stated that they were aware that they were located within close proximity of businesses of a similar type, and recognised that the clustering of similar types of businesses can be useful. A broad range of benefits derived from clustering was identified and is presented in Figure Twenty however the sharing of information was the main benefit, identified by 25.93% of the sample.

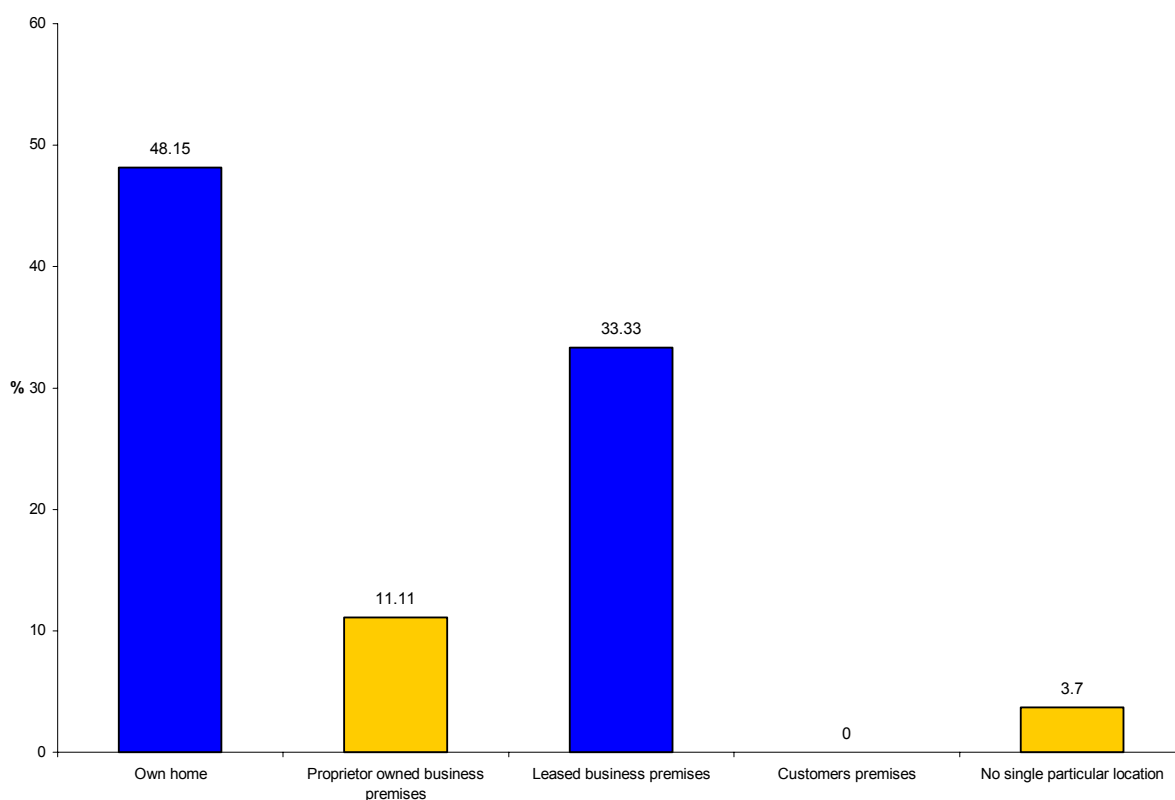
Figure Twenty – Benefits derived from clustering



The proprietors' own home serves as the main type of business accommodation for graphic design businesses in Bolton, (48.15%), probably reflective of a range of attributes connected to the typography of the businesses. As the size of companies is primarily micro and small, and as majority of companies employ staff on an as and when basis, many employers do not have to provide working accommodation for staff. Operating a business from an office at home reduces financial overheads such as rental costs.

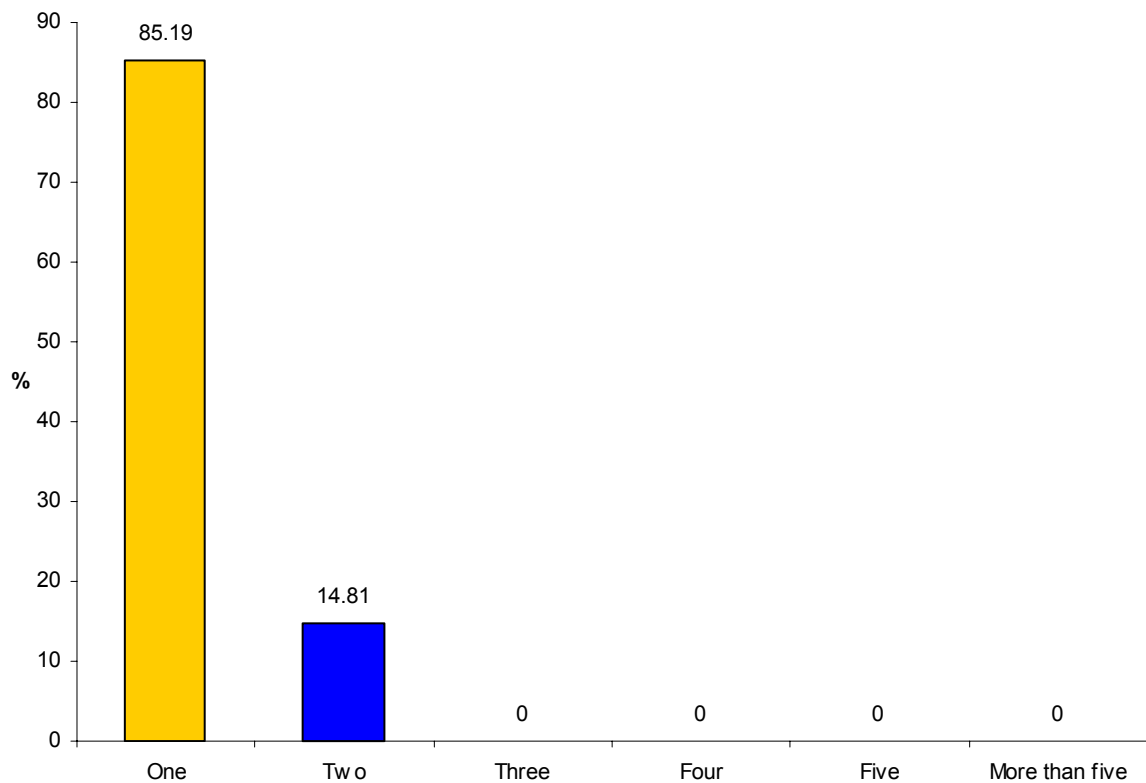
Furthermore, 33.33% of the sector operates from leased business premises but there is little evidence to support that more than 11.11% of the graphic design businesses in Bolton have financially invested in buying business premises.

Figure Twenty-One– Properties used as main business location



All of the businesses included in the sample confirmed that they were running a graphic design business based in Bolton, with a clear majority (85.19%) operating from one site, the remainder from two sites. With regard to the location of sites, 96.3% of the sector has all sites based in Bolton, whereas 3.7% of the sector has additional sites in Greater Manchester.

Figure Twenty-Two – Number of Operational Sites



Generally, graphic design businesses in the Bolton do engage with markets throughout Bolton, Greater Manchester, the North West, and the United Kingdom. However the graphic design businesses in Bolton are providing the greatest density of services equally to markets in Bolton (37.1%) and throughout the North West (37.1%). This suggests that graphic design businesses in Bolton are primarily providing services to other Bolton based businesses, through the sale of their main creative activity. However, it must be questioned as to why none of the businesses are accessing markets throughout the rest of the UK. Furthermore, it is particularly notable that there are no Bolton based graphic design businesses effectively penetrating overseas markets. As a growing sub-sector of the creative industries, how will graphic design businesses in Bolton survive the competition generated by a growing industry, when they are all providing services to businesses in the same location, making few efforts to access markets outside the region?

Figure Twenty-Three – Geographical Market Dependence for Graphic Design Businesses in Bolton

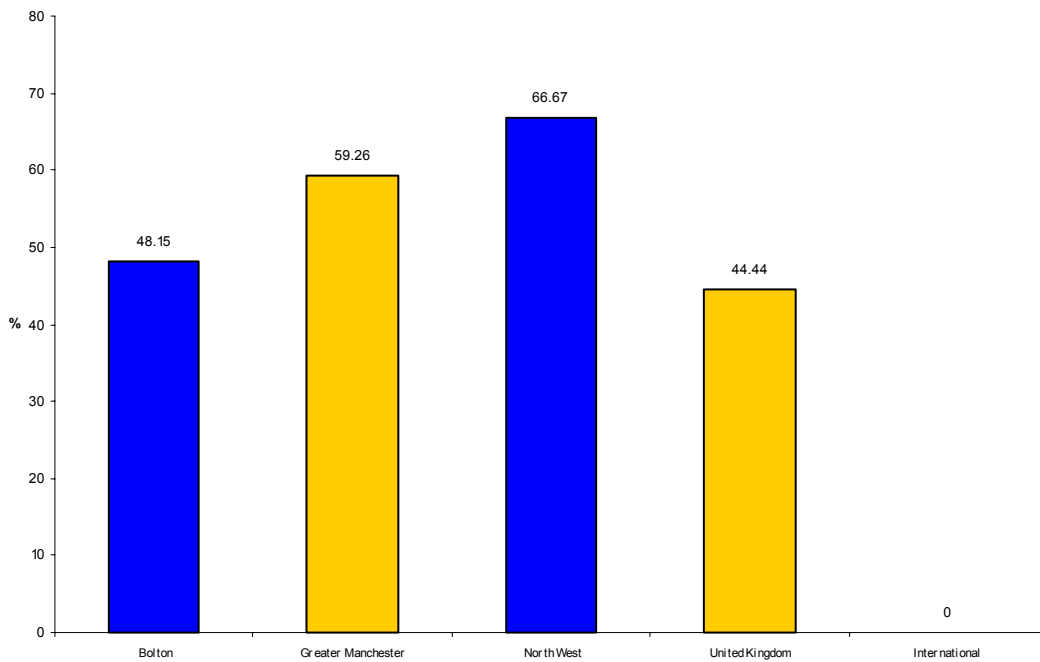
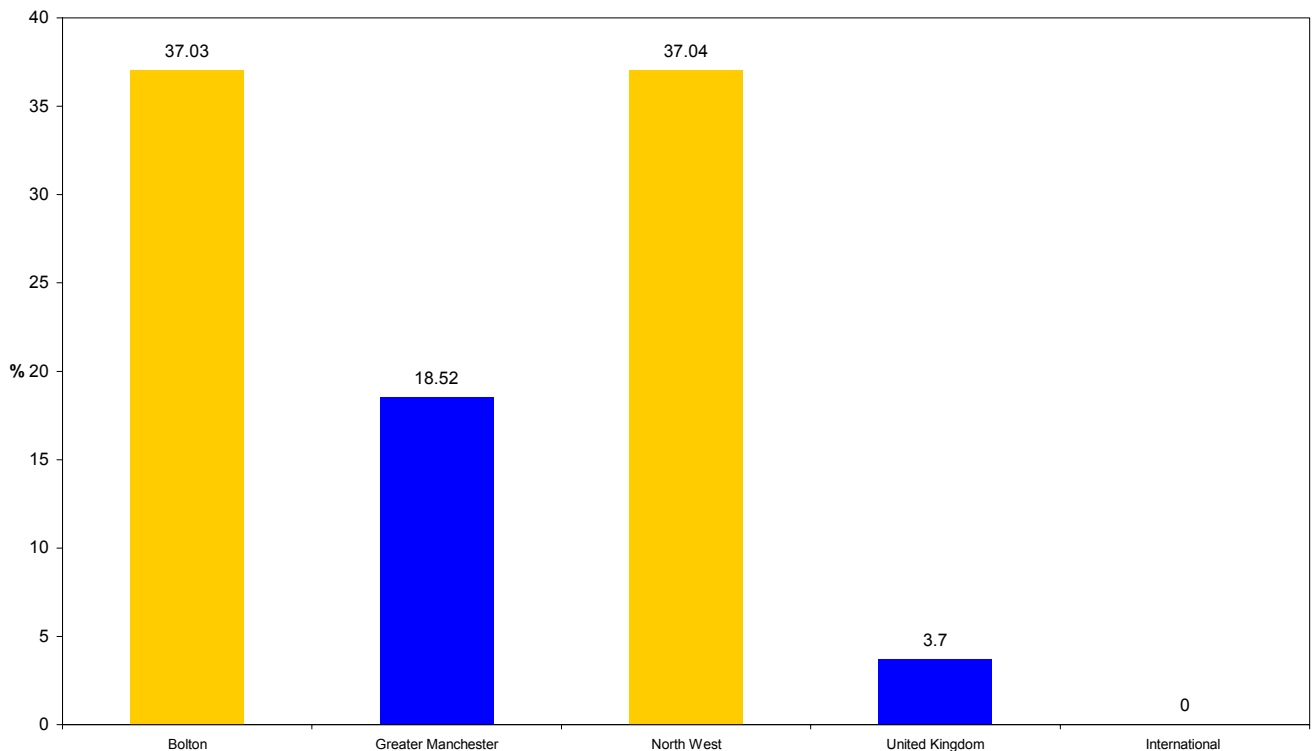


Figure Twenty-Four – Areas accounting for the majority of main customers



A Profile of the Education and Training Activities in the Bolton Location

There is almost equal distribution in the number of graphic design businesses in Bolton engaging in retraining activities. The exact figures are presented in Table Eight.

Table Eight – Percentage of businesses in receipt of training

Percentage of businesses in receipt of training	Percentage of businesses not in receipt of training
51.85%	48.15%

Employers are primarily responsible for the majority of payment for training activities (48.15%). There is however some financial investment into training provided by other sources, these are displayed collectively in Figure Twenty- Five.

Favourite delivery mechanisms of training are varied and a complete analysis is presented in Figure Twenty-Six. It is clearly noted however that Block Release training methods are not a preferred delivery method and is not accessed by any graphic design business in the Bolton location.

Figure Twenty-Five – Payment of Training

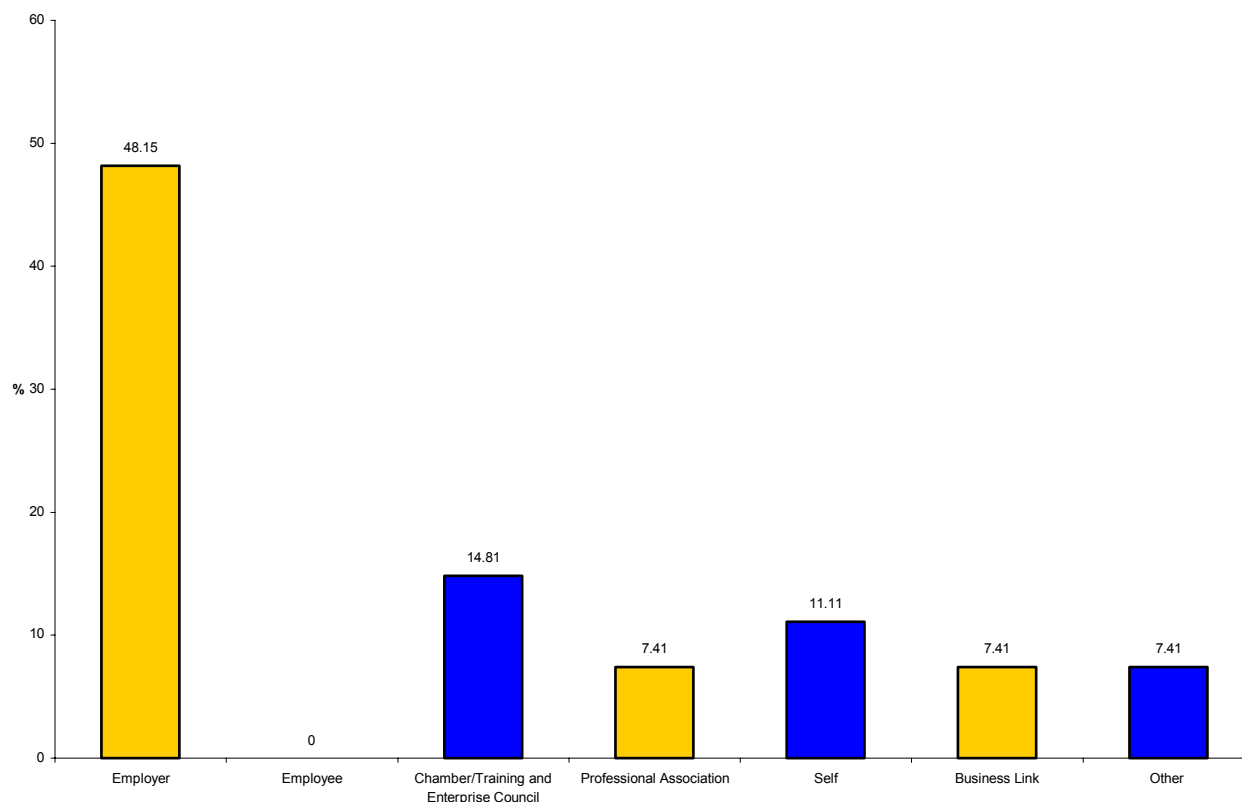
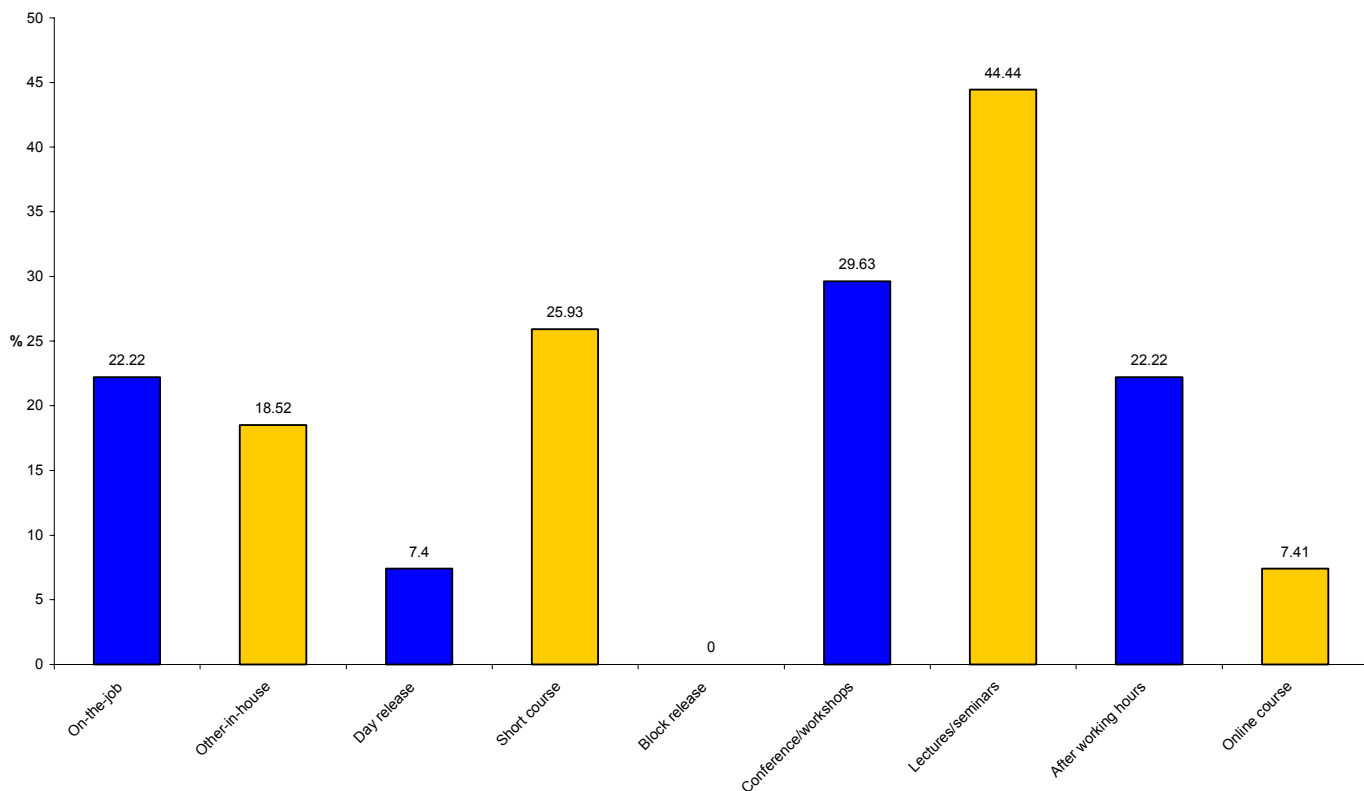
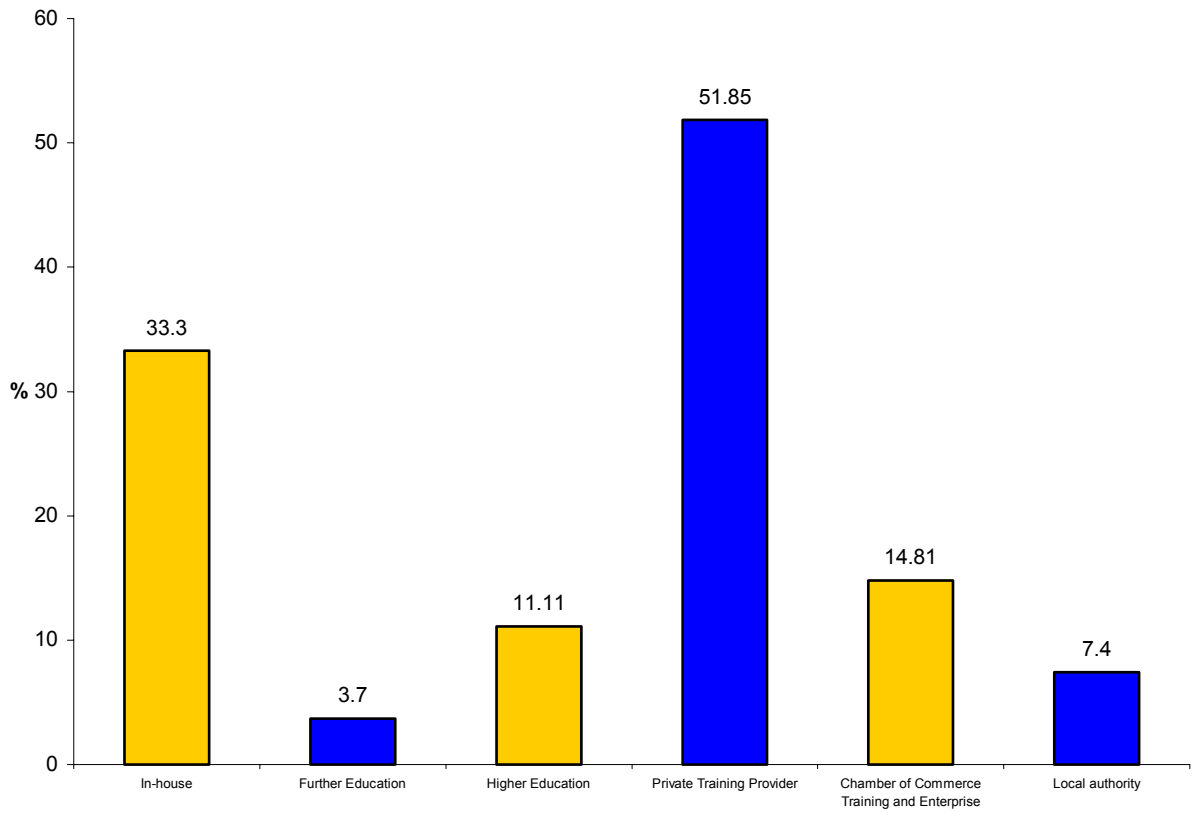


Figure Twenty-Six – Training accessed by type of provider



Private training providers are the main provider of training activities in Bolton, delivering 51.85% of all training received by the graphic design sector, followed by in-house training (33.33%). It is particularly interesting to consider that with regard to educational institutions in the Bolton area there are no further education institutions providing training to the sector and only 11.11% of the sector is accessing training available via a higher education institution. A complete analysis of all training providers is presented in Figure Twenty-Seven.

Figure Twenty-Seven– Providers of Training



Of those businesses that have accessed training, satisfaction of the training service is of equal divide, as 50% of graphic design enterprises confirm they are satisfied with the training they received and 50% stating that they are not.

Research Methodology - Data Collection

The methodology employed to produce the study, used a combination of postal and email questionnaire implementation techniques, with follow up telephone enquiries. Frequenting a networking event, used to provide business support to the sector, also proved a successful method of enticing companies to complete the survey.

The data collected was then analysed using SPSS statistical analysis and Microsoft Excel. A database of practicing graphic design companies in Bolton was formulated using a variety of information sources, including, local telephone and business directories, the EDI Design Consultancy register, local authority databases and specialist networking events. The aim was to produce an accurate database of graphic design companies operational within the year ending the 30th April 2003 within Bolton location. From this database, the postal address of the companies confirmed that each company was trading within the geographic location of Bolton and that the postcodes of the companies corresponded with those of Bolton and surrounding wards as stated by the local authority, Bolton Council.

Upon the implementation of the survey, follow up telephone enquiries of non-received responses enabled the database to be thoroughly screened for companies which were no longer trading. Those that were deemed inappropriate to be included within the graphic design sector or those trading for less than a year were removed. This established a database confirming 34 companies to be used as participants within the study.

The questionnaire used was designed and piloted to meet the needs of a baseline survey and had successfully been used by Professor Simon Roodhouse in his published study of the Designer Fashion sub-sector in the North West and Yorkshire and Humber regions, entitled 'Essential Facts: The Nature of Designer Fashion and its Markets'. However, as this study focused on the Graphic Design sub-sector questions relating to activity were replaced with options relating to activity relevant specifically to the graphic design sub-sector. A common definition of activity within the graphic design sub-sector was concluded from a comparative study which cross-referenced descriptors of activity, sourced from the Office of National Statistics, Department of Culture, Media and Sport, The Australian Bureau of Statistics, Eurostat, The Design Council and the International Council of Graphic Designers.

The questionnaire was constructed using closed multiple-choice questions, and on most issues, the respondents were provided with the option to choose "other", space was provided to give further details of the 'other' description. The multiple choice style questionnaires aimed to reduce the time taken to complete the survey and make completing the questionnaire an undemanding and simple process, therefore raising the possible number of responses gained. The questions aimed to elicit information from the respondents focusing upon the following key areas.

- About you and your company
- Types of people working for you
- Income and activity
- Training
- Organisational issues

The time needed to complete the questionnaire was estimated at 15 -20 minutes and confirmed accurate when piloted by 5 practicing graphic design companies. Piloting the survey also highlighted any minor flaws within the questionnaire, which were adjusted before the implementation to the complete sample (inclusive of those

companies who had completed the pilot exercise).

The final sample achieved through the database received a postal questionnaire together with instructions, an explanatory covering letter outlining the nature of the study and a stamped addressed envelope to return the questionnaire.

With such a small sample size the target response rate was 75%.

In total, 27 businesses responded to the questionnaire, representing just over 79.41%, exceeding the target response rate.

Difficulties encountered in this type of approach

When conducting any research study that is reliant completely on company responses it is routine to anticipate difficulties. This study was no exception.

Using a postal questionnaire method provoked some difficulties. In few instances the postal addresses for companies were inaccurate, however telephone enquiries confirmed these and the questionnaire was re-implemented. Furthermore, the questionnaire was also resent by email to outstanding recipients, this gained further responses and also confirmed address related issues as to why respondents had not returned the questionnaire.

The postal method received a slow response rate and so it was decided to contact those who had not responded by telephone to encourage them to complete and return the questionnaire. The researcher spoke directly to the creative directors and confirmed the nature of the study and the essentiality of their participation. Approaching companies in this way did prove successful and increased the number of responses gained dramatically.

In this study using follow-up telephone enquiries also confirmed companies that were no longer trading and those that had relocated outside of Bolton and the surrounding wards. It also revealed new start businesses that have been established within the year ending 30th April 2004, but were unsuitable for inclusion within the year ending 30th April 2003.

Telephone enquiries also highlighted companies that did not feel that they were inclusive to the graphic design sector. It was confirmed through telephone enquiries that there were some companies that were categorised within the database as being graphic designers, but were in-fact publishers, illustrators or solely web design/developers, as a result these companies were removed from the sample.

Furthermore, telephone enquiries proved a useful way of determining why some responses were not gained. There were two major factors evident. Firstly, the nature of the study required that potential participants disclose financial information on turnover, salary and investment. This type of information was reviewed as confidential to the company and therefore some companies were not willing to disclose such sensitive information. Secondly, others claimed that despite being approached to complete the questionnaire on numerous occasions, they were simply too busy to participate.

Finally, accessing a networking event, used to provide business support to the sub-sector, proved an effective way of receiving responses from those who had not done so by post. It also revealed companies which were not identified in the original source material when developing the database.

Future Research & Recommendations

The 'Baseline Analysis of the Graphic Design Industry in Bolton' meets the initial and stated aim of presenting an accurate account of the graphic design industry in Bolton, in the year ending 30th April 2003. However, with any study this research bares limitations.

There are numerous issues which require further analysis to fully understand the nature of the industry; this mainly lies with the understanding of the sector's infrastructure.

The analysis of networks and relationships would provide a deeper understanding of the infrastructure within the industry. Further analysis would demonstrate precise interactions within the sector and would highlight evidence regarding relationships within the domains of buying and selling, customer location/profiles, supply and value chain relationships, alliances and agreements, business support networks, inter-company networking within the industry and relationships with educational institutions.

Due to the initial baseline analysis of the graphic design sector being conducted at such a micro-level, the study is a useful indicator of the health of the graphic design industry in Bolton and is beneficial to informing business support and policy making on a local level. Furthermore, should the methodologies used to produce this study be employed in other regions, this would generate benchmarks and create opportunities for comparison at a regional level.