A Micro Primary Baseline Analysis of the Visual Arts sector, a creative industry related activity in Bolton Council

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A Micro Primary Baseline Analysis of the Visual Arts 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 directed by Prof. Simon Roodhouse.

Visual Arts Baseline Analysis for Bolton

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. Prior to 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.

Previous literature which defines the visual arts industry, produced by The DCMS, ACLC and Eurostat, have been used to inform this research. In addition, definitions have been sourced from The Arts Council England, the Visual Arts Association and A-N Artist Information Company. A comparative analysis of these definitions has informed the definition used by Professor Simon Roodhouse and Isla Johnstone, University of Bolton, for the purposes 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 2005. The research provides baseline data for those with a direct interest in visual arts, and is informant to the implementation of economic and social policy, with particular reference to the development of the creative industries sector.

A Micro Primary Baseline Analysis of Visual Arts, a creative industry related activity in Bolton Metropolitan Borough Council

The SIC/SOC typography of the arts industry may be sufficient for generally describing the sub sector, and is primarily used to identify any industry and its productive activities in the UK. Within the SIC framework, all forms of art are coupled with literacy creation and resides within the SIC code **92.31/9, Artistic and Literacy Creation.** It is noted that in this instance the Office of National Statistics fails to provide any further definition of the component creative activities which constitute what can only be described as a generalised descriptor of all artistic and literacy creation. Therefore as the OSN fails to provide a SIC code specific to visual arts there is no current national mechanism for quantifying this creative activity within the industry on a consistent basis.

This approach to classifying the industry is the regular method of categorising industries in the UK, however for statisticians attempting to quantify the creative industries this method has proved imprecise. This is due, in part, to the fluidity of the creative industry sub-sectors that is a lack of agreed definitions and consequent lack of empirical evidence available to underpin individual activities. In the UK the Department of Culture Media and Sport (DCMS) has created a framework to substantiate the creative industries. It is worth noting that the efforts made in the Creative Industries Mapping Documents 1998 and 2001 provide at least a workable framework for creating a basic parameter in identifying those industries which capitalise on the exploitation of creative skill and talent.

In the DCMS Creative Industries Mapping Document 2001, the visual arts can be found in the Arts and Antiques Market which is identified as one of the thirteen creative industry sub-sectors. Within this definitional framework the following activities are listed as being evident within this sub-sector.

Trade in arts and antiques including
Painting
Sculpture
Works on paper
Other fine art (tapestries)
Furniture
Collectables (mass produced ceramics and glassware, dolls and dolls houses, advertising and packaging)
Couture (including jewellery)
Textiles
Antiques
Books, bindings, signatures and maps
Arms and amour
Metalwork

Internationally, it is acknowledged that using nationally accepted classification systems as a framework for measuring the creative industries is an imprecise method for quantifying activity particularly the visual arts. However, the 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 has created parameters for data collection to measure performance and quantify economic revenues of the creative industries.

Authored by Isla Johnstone & Prof Simon Roodhouse and assisted by the Creative Industries Group, University of Bolton.

At a European level the publication of the LEG report, *Cultural Statistics in the EU* (Eurostat 2000), outlined the lack of cultural statistics at an EU level. The report aimed to provide a framework which defined a common core of disciplines to be considered as cultural industries within the EU and in response create a classification system drawing on a framework for Cultural statistics as defined by UNESCO. This method sourced definitions of cultural activity from the national classifications of industrial activity produced by independent members of the EU. Within the LEG Eurostat definitions, the visual arts domain includes,

Design
Photography
Multidisciplinary

In the following areas,
Creation
Inclusive of the creation of visual works
Production
The production of visual arts
(Production of printed reproduction, productions of casts etc)
Dissemination
Exhibitions of visual works
Organisation of festivals
Event organising and awareness raising
Trade
Trade and sales in visual works in galleries, reproduction and restoration

Despite the LEG framework identifying Visual Arts as a sub-sector this definition does not further the definition provided by the ONS, but painfully broadens the sub-sector to include design, photography and multi-disciplinary. Grouping these industries together expands the definition of visual arts and fails to present evidence to quantify activity within the component industries included within this sub-sectoral definition.

Visual Arts
This class consists of the creation of one-off or limited series visual arts or crafts in either traditional or contemporary styles. Primary activities include:

Art photography
Artwork creation
Cartoon drawing
Ceramic work creation
Digital Art work Creation
Illustrating or drawing
Installation (art) creation
Jewellery design
Painting (art)
Pottery creation
Sculpting
Textile design

Table one- A comparative analysis of National and International Definitions of Visual Arts

OFFICE OF NATIONAL STATISTICS STANDARD INDUSTRIAL CLASSIFICATION CODE	**DEPARTMENT OF CULTURE, MEDIA AND SPORT**	**AUSTRALIAN BUREAU OF STATISTICS ACLC CODING SYSTEM**	**EUROSTAT LEG REPORT DESCRIPTOR**
Code 92.31/9 Artistic and Literacy Creation and Interpretation	Included within definition of Arts and Antiques Market Trade in arts and antiques including Painting Sculpture Works on paper Other fine art (tapestries) Furniture Collectables (mass produced ceramics and glassware, dolls and dolls houses, advertising and packaging) Couture (including jewellery) Textiles Antiques Books, bindings, signatures and maps Arms and amour Metalwork	Code 241 Visual Arts Class consists of the creation of one-off or limited series visual arts or crafts in either traditional or contemporary styles. Primary activities include Art photography Artwork creation Cartoon drawing Ceramic work creation Digital Art work Creation Illustrating or drawing Installation (art) creation Jewellery design Painting (art) Pottery creation Sculpting Textile design	The visual arts domain includes Design Photography Multidisciplinary In the following areas, **Creation** Inclusive of the creation of visual works **Production** The production of visual arts (production of printed reproduction, productions of casts etc) **Dissemination** Exhibitions of visual works Organisation of festivals Event organizing and awareness raising **Trade** Trade and sales in visual works in galleries, reproduction and restoration

Table One clearly documents what can only be described as a crude attempt to define the visual arts sub-sector at a national and international level, providing an imprecise method to account for activity within the sub-sector. It is clearly noted however that at an international level, visual arts has been recognised as an individual sub-sector; however this is not evident in any UK classification systems. With such inconsistent accounts of activity within the sector however, the reliability of these definitions must be questioned. So where does this leave us?

Defining Visual Arts through Economic Activity

On a national and international level numerous statisticians have attempted to define the role and activity of visual artists in order to quantify the sector for economic purposes. Shrewd mechanisms have been used to account for activity within the sector, bringing no further understanding of creative activity, but providing criteria simply to identify artists to further quantify or account for economic activity. An economic alternative to the visual arts definitions referred to in Table 2 have been coined by Towse (1996), Frey and Pommerehne (1989) identifying artists through applying an eight point criteria:

Table 2: An Economic Definition of the Visual Artist

1.The amount of time spent on artistic work
2. The amount of income derived from artistic activities
3. The reputation as an artist among the general public
4. Recognition among other artists
5. The quality of artistic work produced
6. Membership of a professional artists group or association
7. A professional qualification in the arts
8. The subjective self-evaluation of being an artist

Source: artists in figures, a statistical portrait of cultural occupations Arts Council England research report 31, 2003

Furthermore, in 2002 IFACCA set out to define artists for Tax and Benefit purposes, outlining the need to determine who is a "professional artist?"

"A fully comprehensive international comparison of definitions must cover a large number of tax and benefit systems" IFACCA (2002).

This particular research paper did not aim to provide a sophisticated definitional framework for defining arts activity, but demonstrated examples of how individual countries had used similar methods to that of Towse, Frey and Pommerehne to identify artists.

Quantifying Creative Activity Coupled with Economic Activity

At a national level in the UK the DCMS document provides an imperfect but workable framework to identify the creative industries. However attempting to quantify the sub-sectors is more difficult when employing the same data in a regional and local context. An accurate descriptor of the component activities within individual industries is the only way to ensure the risk of overlap and double counting is avoided, and that even coverage is achieved.

To review just one of the recent efforts in the UK which aimed to quantify and map the arts sector, *The North Yorkshire Artists and Makers Survey* was produced by Chrysalis Arts, funded by Yorkshire Arts in 2001. The survey aimed to identify the number of artists and makers/craftspeople working in the county to obtain a more accurate picture of the range and scale of their activities and contribution to the county's cultural economy.

An alternative method of defining definitions that are more specific to quantifying the activity within the visual arts sectors is to review those sourced from the primary support agencies of the arts in the UK.

The Arts Council of England (ACE) is the primary support agency of the entire arts sub-sector in the UK. They define the activities specifically within the visual arts sub-sector to include the creation, dissemination, exhibition and education of those practicing in the following areas:

Crafts
Contemporary visual arts
Fine art
Public art
Architecture
Photography
Artists work in new and emerging media,
Film and Video.

This methodology provides a definition of the visual arts sector based on research and ongoing work undertaken by ACE. However, it is worth noting that this definition includes crafts, film and video and architecture which are described as individual sub-sectors within the DCMS creative industries definitional framework. The rationale for creating such a broad inclusion of activities within the visual arts sector must be questioned. Furthermore why does ACE include industries which are not only identified as individual industries within the DCMS definitional framework, but are independently supported by The Crafts Council, The British Film Council and the Royal Institute of British Architects? This suggests a direct overlap of activity not only in the arts sector but also the component creative industries enshrined within the definition, and indeed their component activities.

The Visual Arts and Galleries Association is the UK based association responsible for the support and development specifically of the Visual Arts. The definition provided by VA is representational of its direct engagement with practitioners in the visual arts sub-sector, and is as follows.

Painting
Sculpture
Drawing
Photography
Installation
Performance
Multimedia (or new media)
Public Art
Film
Video
Printmaking

The function of the A-N (Artist Newsletter), a product of the Artist Information Company is primarily to inform and disseminate information to and about artists. A-N provided the following definition of the visual arts activity.

"Anything that is visual and you appreciate through viewing"

This definition provides little explanation of activity within the sector, and leaves it to the audience to interpret what they consider to be visual art, based on whether or not they appreciate its aesthetic qualities.

The definitions sourced from support agencies can be viewed in Table Three.

Table Three- Visual Arts Definitions provided by sub-sector support agencies

ARTS ENGLAND NORTH-WEST DESCRIPTOR	THE VISUAL ARTS AND GALLERIES ASSOCIATION	AN - ARTIST INFORMATION COMPANY
The visual arts sector includes the creation, dissemination, exhibition and education of those practicing in the following areas. Crafts Contemporary visual arts Fine art Public art Architecture Photography Artists work in new and emerging media, Film and video.	Activities included within the visual arts sector include, Painting Sculpture Drawing Photography Installation Performance Multimedia (or new media) Public Art Film Video Printmaking	Anything that is visual and you appreciate through viewing.

An Occupational Definition
At an international level, a definition of visual or indeed any artistic occupation is provided by The United Nations Educational, Scientific and Cultural Organisation (UNESCO). UNESCO states:

"Any person who creates or gives creative expression to, or recreates works of art, who constitutes works of art to be an essential part of his life, who contributes in this way to the development of the arts and who is or asks to be recognised as an artist, whether or not he is bound by any relations or association" (UNESCO 1980)

This statement does not provide any definition of the occupation of an artist based on activity, and thus brings no understanding to the role of a visual artist or the component activities within the sector.

On a national level the ONS categorises occupational activity for all employment in the UK in the Standard Occupation Classification system. Within this classification system there are definitions of different artistic occupations. They are as follows:

Artist – Boot and shoe
Artist – Ceramic
Artist – Commercial
Artist –Computer
Artist – Display
Artist – Fashion
Artist – Film

Artist – Floral
Artist – Graphic
Artist – Layout
Artist – Lettering
Artist – Litho
Artist – Lithographic
Artist – MAC
Artist – Make-up
Artist – Medical
Artist – Paste-up
Artist – Photographic
Artist –Pottery
Artist – Press
Artist – Scenic
Artist – Shoe
Artist – Technical
Artist – Ceramic Decorating
Artist – Entertainment
Artist – Glass Decorating
Artist – (Mask myr)
Artist – Artist
Artist – Designer Fashion.

It is worth noting that in the above descriptors of artistic occupations, provided by the ONS, that as previously evident in the SIC classification system; visual arts are not classified as either an industry or an occupation. Further judgement is required as to which of the above definitions of artists are included within the understanding of the role of the visual arts. The above definitions of the occupational role of artists are presented in Table Four.

Table Four – Occupational Definitions of the Visual Artist

UNESCO Definition	**SOC Definition**
"Any person who creates or gives creative expression to, or recreates works of art, who constitutes works of art to be an essential part of his life, who contributes in this way to the development of the arts and who is or asks to be recognised as an artist, whether or not he is bound by any relations or association" (UNESCO 1980)	Code – 3411 – Artist Workers within this group create artistic works by painting, drawing, printing, sculpture and engraving, design artwork and illustrations, Restoration of damaged pieces of art

It is evident that defining the creative activities of the visual arts industry remains a complex task, and at national and international levels there is no common understanding of the Visual Arts industry available. Devising a solution to what can only be described as a torturous definitional explanation requires judgments based on all of the definitions sourced and the commonalities within them, and the methodologies employed within these definitional frameworks.

On this basis a framework has been constructed to quantify the activities within the visual arts industry, based on the commonalities of activity evident within the definitional frameworks outlined previously as follows:

1. **Fine art / Painting / Public art**
2. **Fine art / Sculpture / Installation**
3. **Photography (one-off copyrighted images or those for the purpose of public art)**
4. **Drawing / Illustration / Works on paper**
5. **Fine art / Printmaking / Public art**
6. **Fine art / Multi-media / New media / Video**

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

A micro primary baseline analysis of the visual arts industry, a creative industry related activity by Bolton Council

RESULTS

Five areas of organisational activity have provided the framework for the analysis of the data collected. They are presented in the following sections,

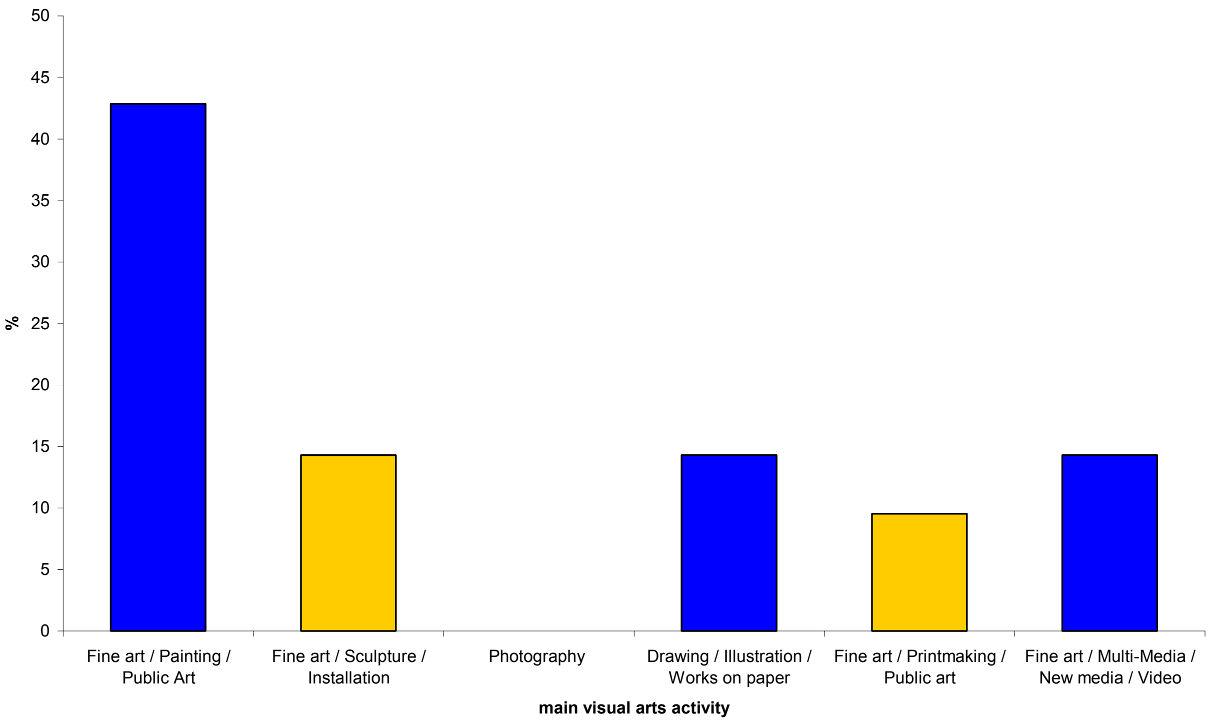
- A detailed analysis of the organisational profile, resources, investments and development issues of the visual arts enterprises in Bolton
- Geography and Markets for visual arts enterprises in Bolton
- A profile of training activities and requirements within visual arts enterprises in Bolton

A detailed analysis of the organisational profile, resources, investments and development issues of the visual arts enterprises in Bolton

This section considers the organisational nature, resources investments and development issues of visual arts enterprises in Bolton.

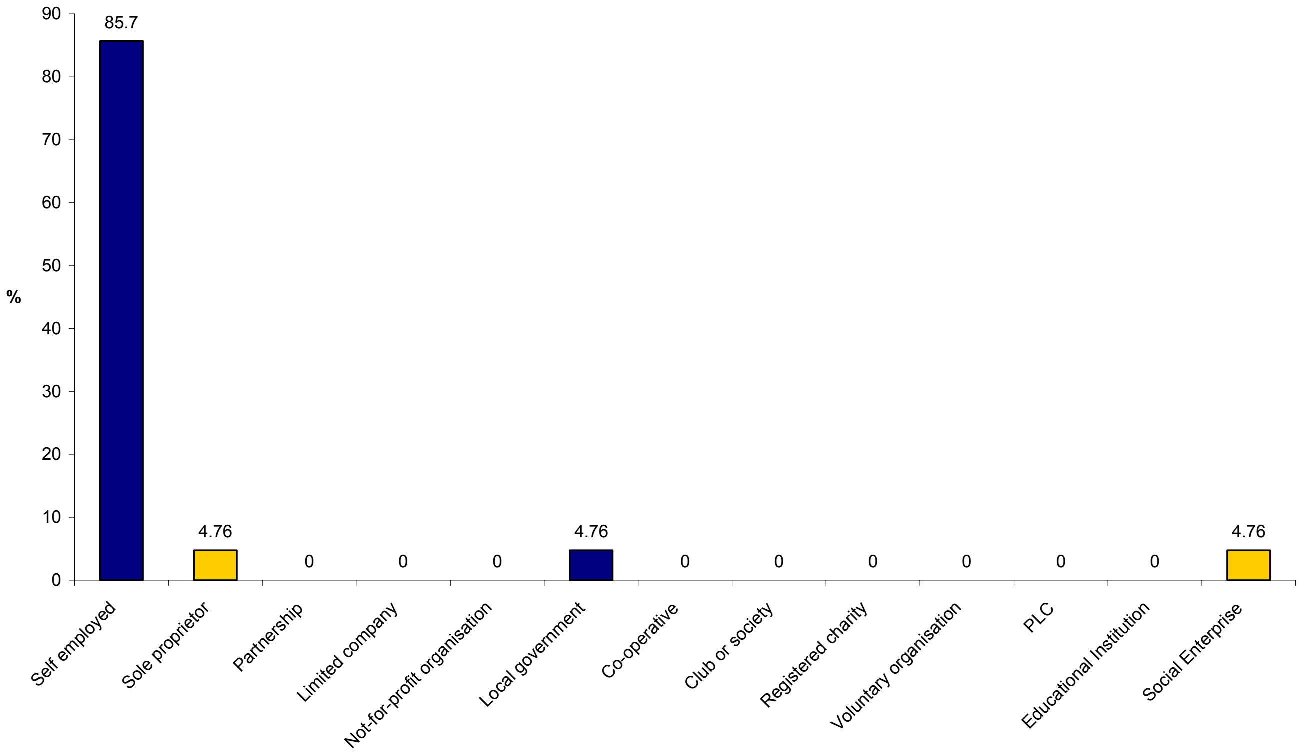
The typography of businesses as defined by creative activity within the visual arts sub-sector is extremely complex, many of which are based on a differentiation of mediums used by the artist. As outlined in Figure One, visual arts businesses specialise in a range of activities that they consider to be their main activity. Based on the definition of activity within the visual arts sub-sector as defined by Roodhouse and Johnstone earlier in this report, none of the companies included in the sample stated that they considered producing photographic imagery to be their main area of creative activity. Although the range of creative activities undertaken by visual arts is diverse, 42.9% of the sample confirmed that fine art / painting / public art are the main creative activities they undertake.

Figure One – Describing the creative activity of visual artists



The visual arts sub-sector is dominated by individuals who are self-employed (85.7%), with only a small minority of enterprises who classify themselves as Sole Proprietor (4.76%), Local Government (4.76%), and Social Enterprise (4.76%). None of the individuals considered their businesses as Limited companies. The results are presented in Figure Two.

Figure Two – Describing the Typography of the Visual Arts Enterprise



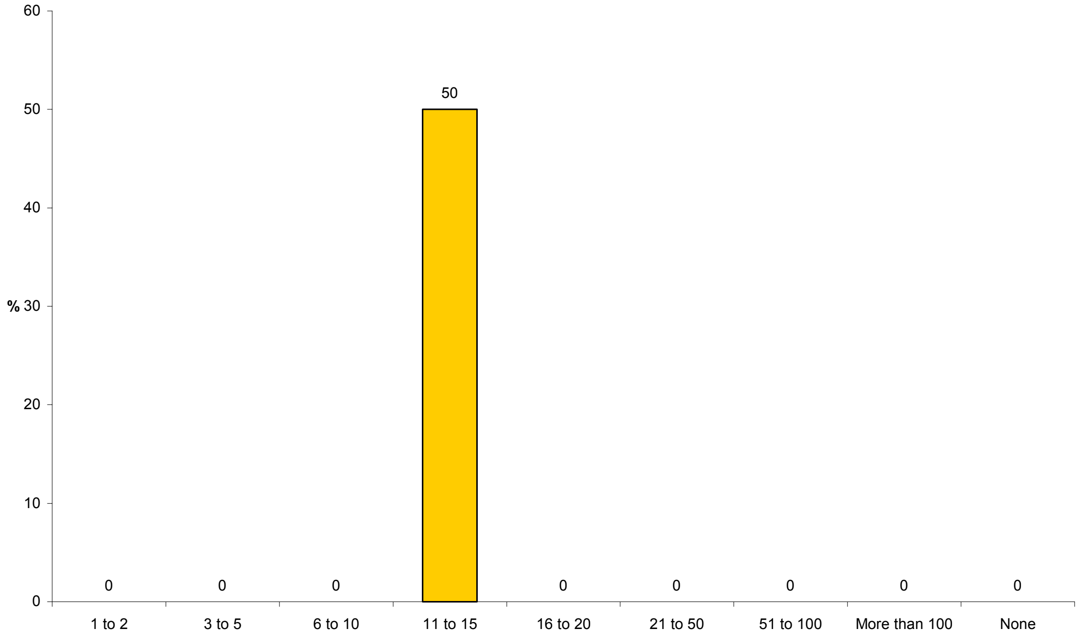
Furthermore, of the total number of businesses employed within the sample there are very few visual arts enterprises employing staff with a contract of employment. The exact figures are presented in Table Five.

Table Five – Percentage of Visual Arts Enterprises that Employ Staff with a Contract of Employment

Percentage of Visual Arts Enterprises who employ staff with a contract of employment	**Percentage of Visual Arts Enterprises who do not employ staff with a contract of employment**
9.52%	90.48%

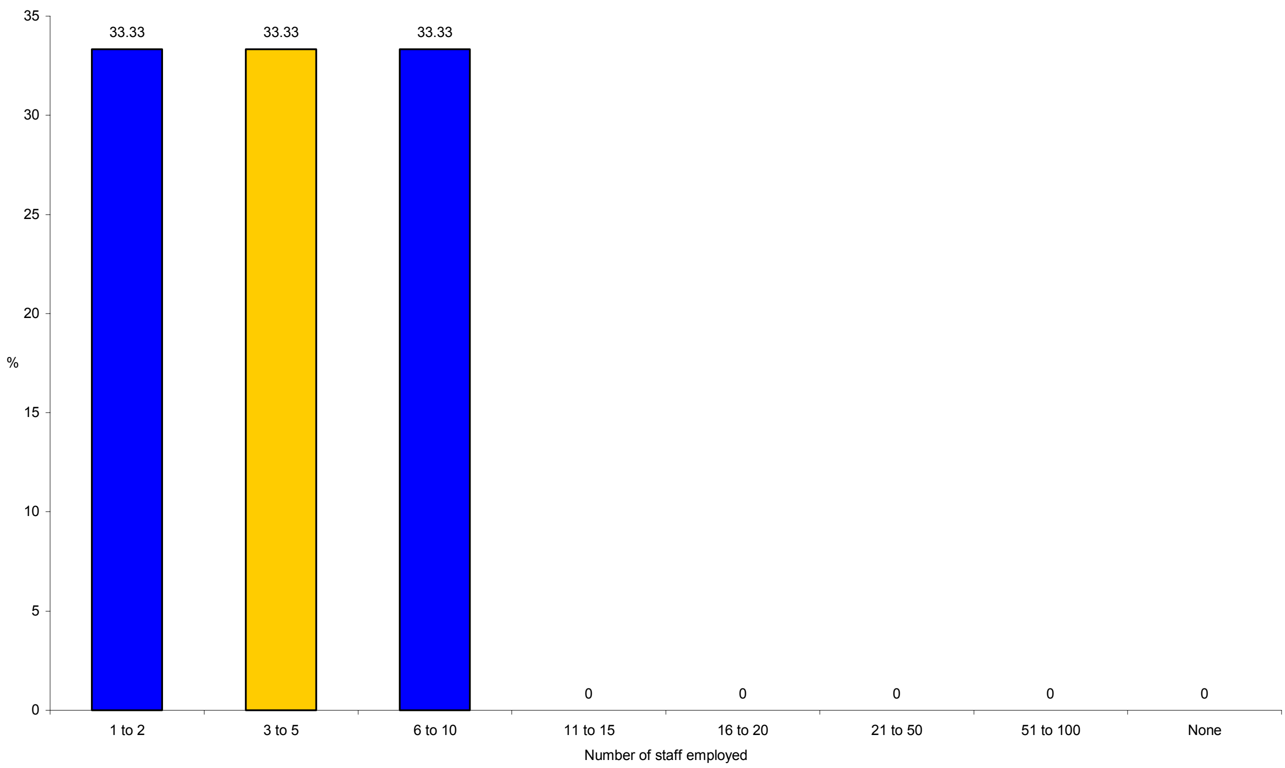
Of the two companies (representing 9.52%) of the sector that do employ staff with a contract of employment, 50% employ only part-time staff and 50% full time staff on this basis. This is presented in Figure Three.

Figure Three – The Number of Staff Employed with a Contract of Employment



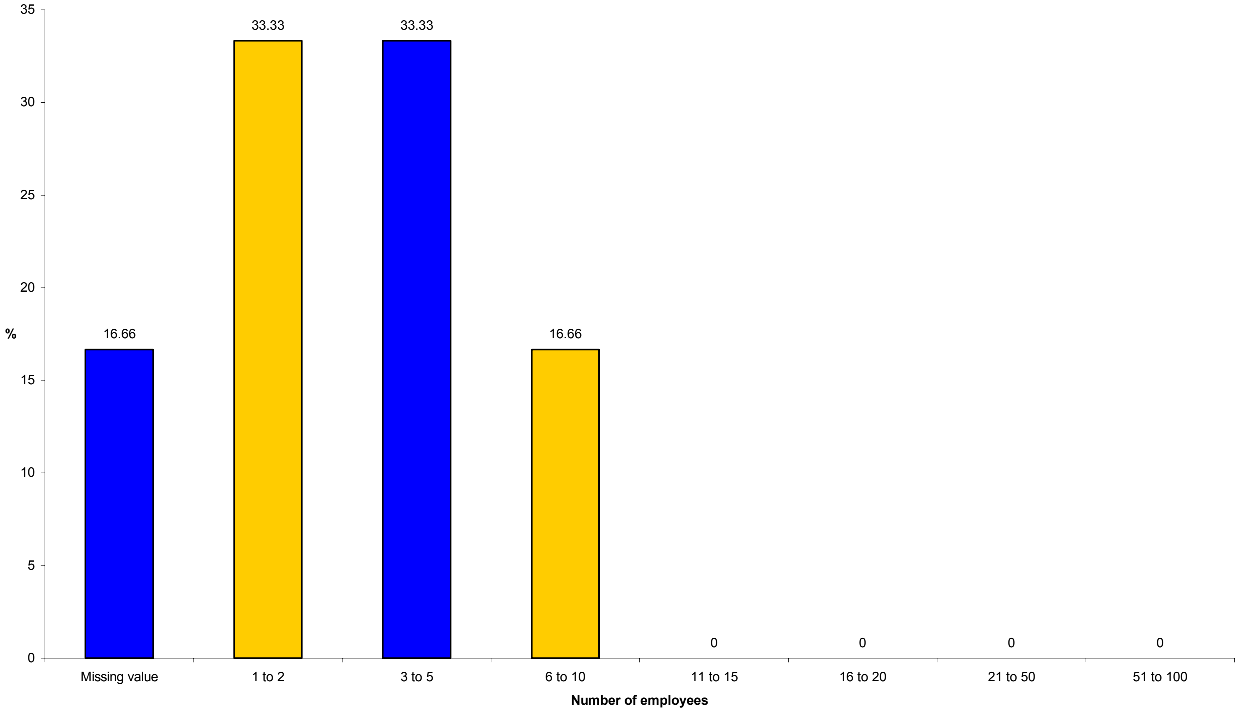
Within the visual arts sector in Bolton 14.26% of businesses included within the sample employ part-time staff. Detailed descriptors of the numbers of part-time staff that are employed are presented in Figure Four.

Figure Four – A Detailed Descriptor of the Numbers of Part Time Employed



It is worth considering that despite such a large proportion of the sector (90.48%) not employing staff with a formal contract of employment, the number of businesses who hire employees that are self-employed, freelance or work on a contract for services basis is slightly more encouraging. Three companies, representing 28.57% of the sample hire staff on a contract for services basis. The number of staff each one hires is presented in Figure Five.

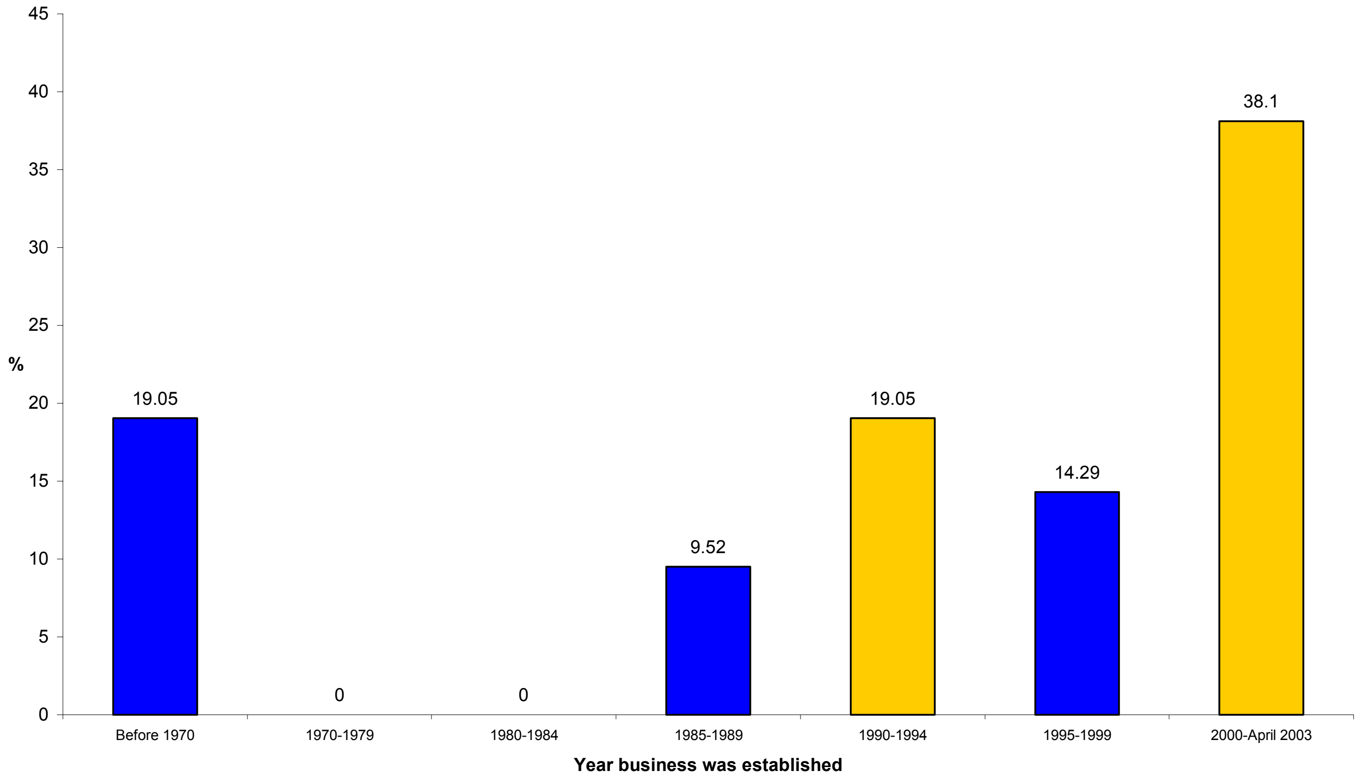
Figure Five – The Number of Employees Hired on a Freelance or Contract for Services Basis



Despite 28.57% of businesses employing staff on this basis, there is still a substantial proportion of the visual arts sector (71.43%) that is not employing staff on any basis at all. Therefore it can be concluded that that visual arts sector is not contributing greatly to the generation and sustainability of jobs in the Bolton borough.

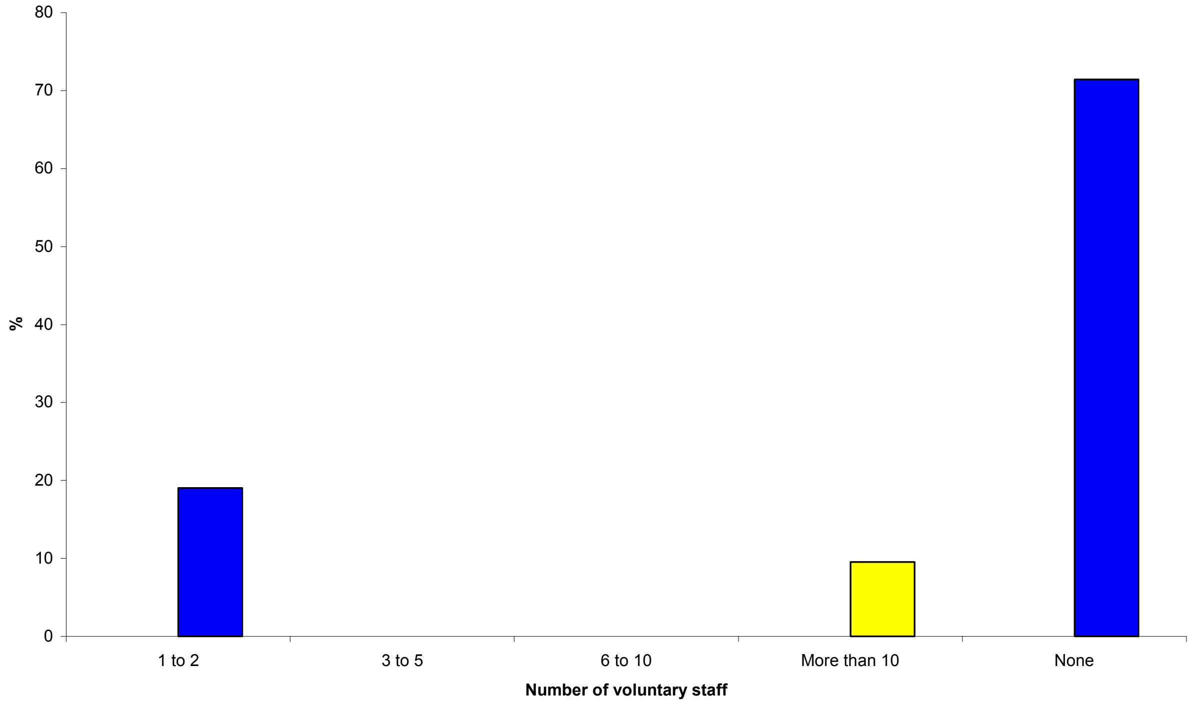
The longevity of visual arts businesses included within the sample is diverse however, a greater density of businesses have been established since the year 2000 (38.10%). This is perhaps representational of the growth in the creative industries businesses that has occurred under the government led support strategies at a national level, and subsequent development initiatives that have been introduced to support the creative industries at a local and regional level. For example, the establishment of the Creative Industries Development Team in 1997 can be seen as a direct engagement by the local authority, (Bolton Council) to develop creative industries at a local level. However, as the sample represents 15.67% of the total sector, further investigation is needed to determine when the remaining visual arts businesses in the Bolton borough were established.

Figure Six – Year Business Were Established



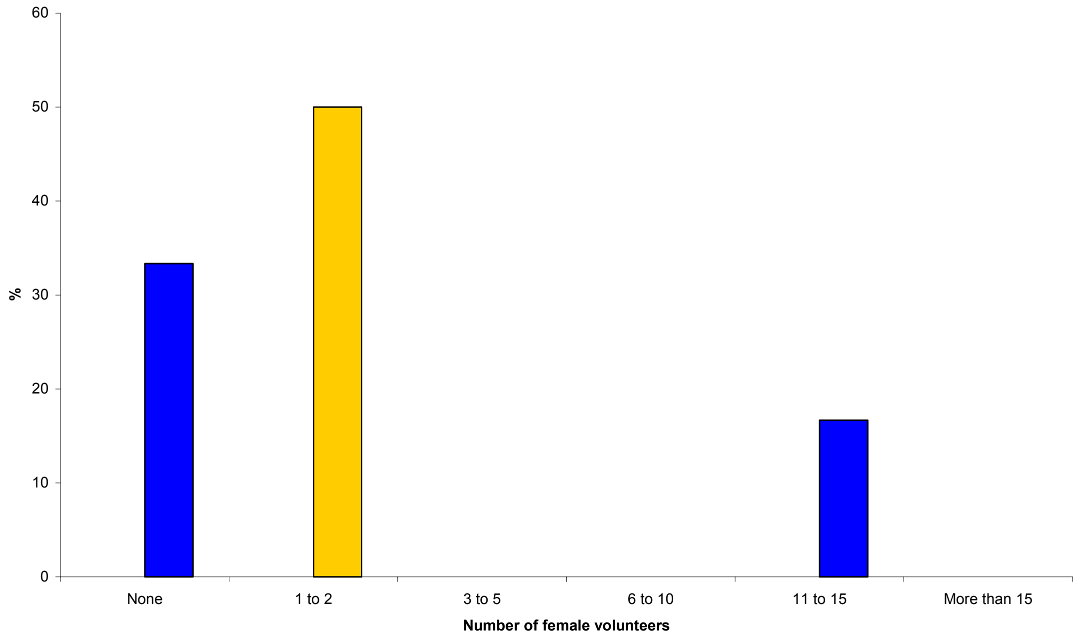
There is some voluntary employment evident within the visual arts sector in Bolton (28.57%). A descriptor of the number of people employed on this basis is presented in Figure Seven.

Figure Seven – Voluntary Employment in the Visual Arts Sector



The greatest percentage (66.66%) of voluntary employment is provided by female employees. The number of females employed on a voluntary basis is evident in Figure Eight.

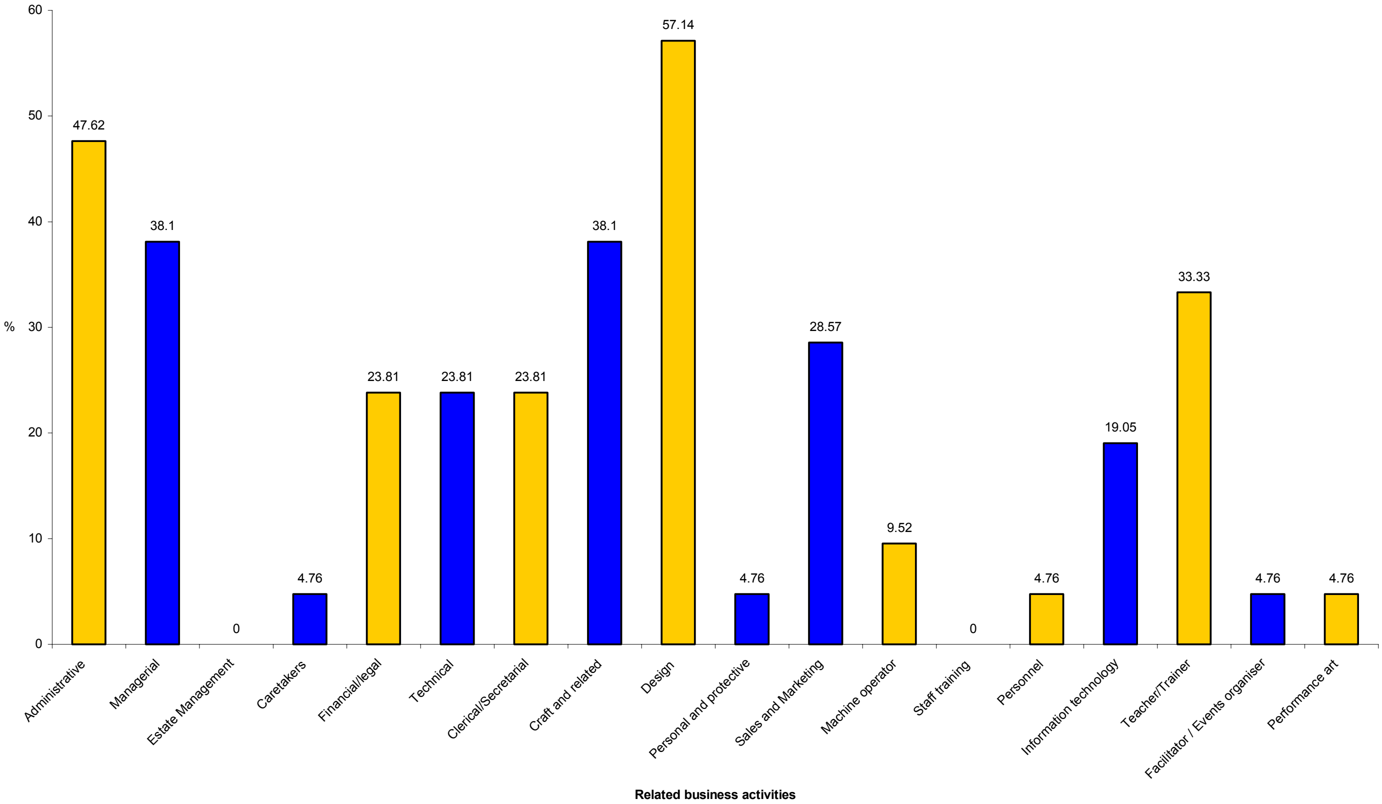
Figure Eight – The Number of Female Voluntary Staff



No visual artists in Bolton were found to have or employ persons who have 'Identified Special Needs'.

In addition to the creative activity of visual arts businesses, several different job roles have been identified as fundamental to the day to day running of a visual arts business. A disaggregated breakdown of results explaining these roles is presented in Figure Nine.

Figure Nine – A Descriptor of All Job Roles Undertaken By Visual Artists

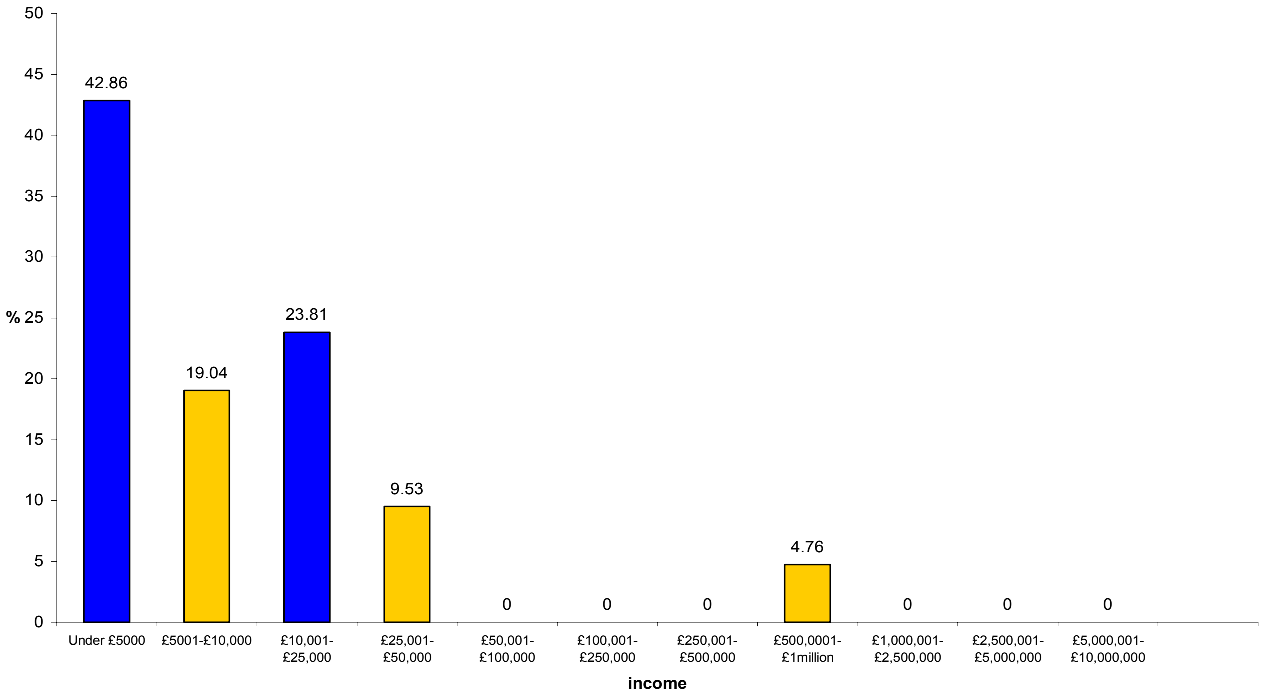


Design (57.14%), Managerial (47.62%) and Craft-related activities (38.10%) are the main roles employed by visual arts businesses. However, it is particularly interesting that 33.33% of the visual arts sector stated that they are engaged in teacher / trainer related activities.

Based on a standard definition of functions which includes Artist, Manufacturing, Agent, Education / Training Provider and Consultants, the position of supply chain is indicated. Unsurprisingly 80.95% of the businesses surveyed stated that the main focus of their work is "Artistic" production. Despite none of the enterprises stating that they are an education and training provider in answer to this question, 33.33% had previously confirmed that they are engaged in teacher / trainer activities.

The total income profile of the visual arts sector is significantly low, with 42.86% of the sector having an annual income of less than £5000. Further to this, as the earnings threshold categories increase in value, the number of businesses achieving greater annual turnovers decreases. A complete breakdown of these results is presented in Figure Ten.

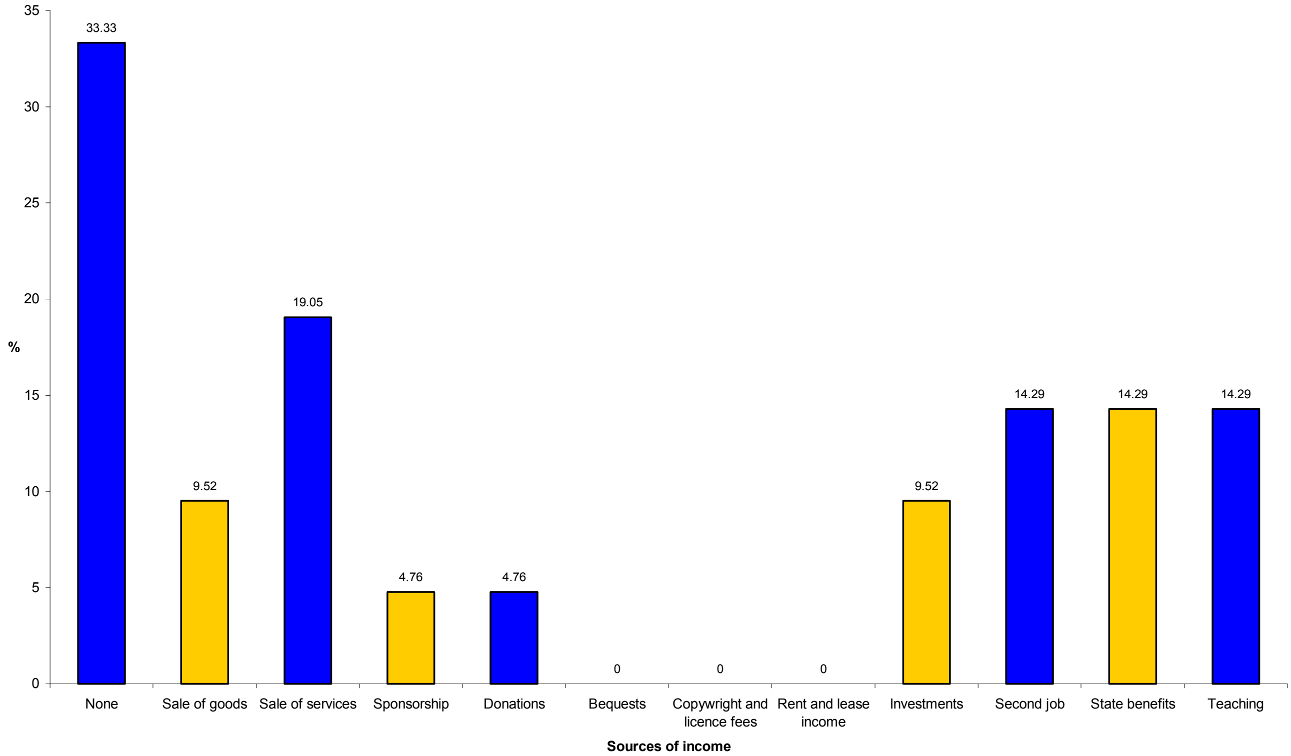
Figure Ten – A Detailed Descriptor of Income Profiles



When considering the movement of the total income, 42.86% of the businesses surveyed confirmed that there had been a rise in annual turnover; 23.81% of the sector experienced a fall in annual turnover, and 33.33% had remained the same as the previous year. Conclusively this demonstrates that the majority of the visual arts businesses in Bolton are experiencing loss or stagnation in annual turnover. What must be questioned is how businesses within the visual arts sector are surviving in what appears to be a torturous economic climate.

In addition to the main trading activity of production and sales of visual arts products, other sources of income are being accessed by visual arts enterprises. In total 66.66% of the sector rely on remunerations from other sources, with some businesses accessing more than one source. It is unsurprising given the percentage of companies in receipt of a significantly low income or experiencing stagnation in annual turnover, that securing remunerations from other sources is evident. The sale of services (19.05%), Second Jobs (14.29%), State Benefits (14.29%) and Teaching (14.29%) are the main types of income provider. A complete breakdown of other types of income available to the sector is highlighted in Figure Eleven.

Figure Eleven – Other Sources of Income for Visual Artists in Bolton



The visual arts businesses surveyed were additionally asked to confirm what percentage of their total income was derived from grant support. The greatest majority of the sector (95.24%) confirmed that grant support did not contribute to the total income of their business. The outstanding 4.76%, which represents one visual arts enterprise in the sample confirmed that grant funding provided in excess of 75% of their total income. This grant support was provided solely by Community Chest funding body.

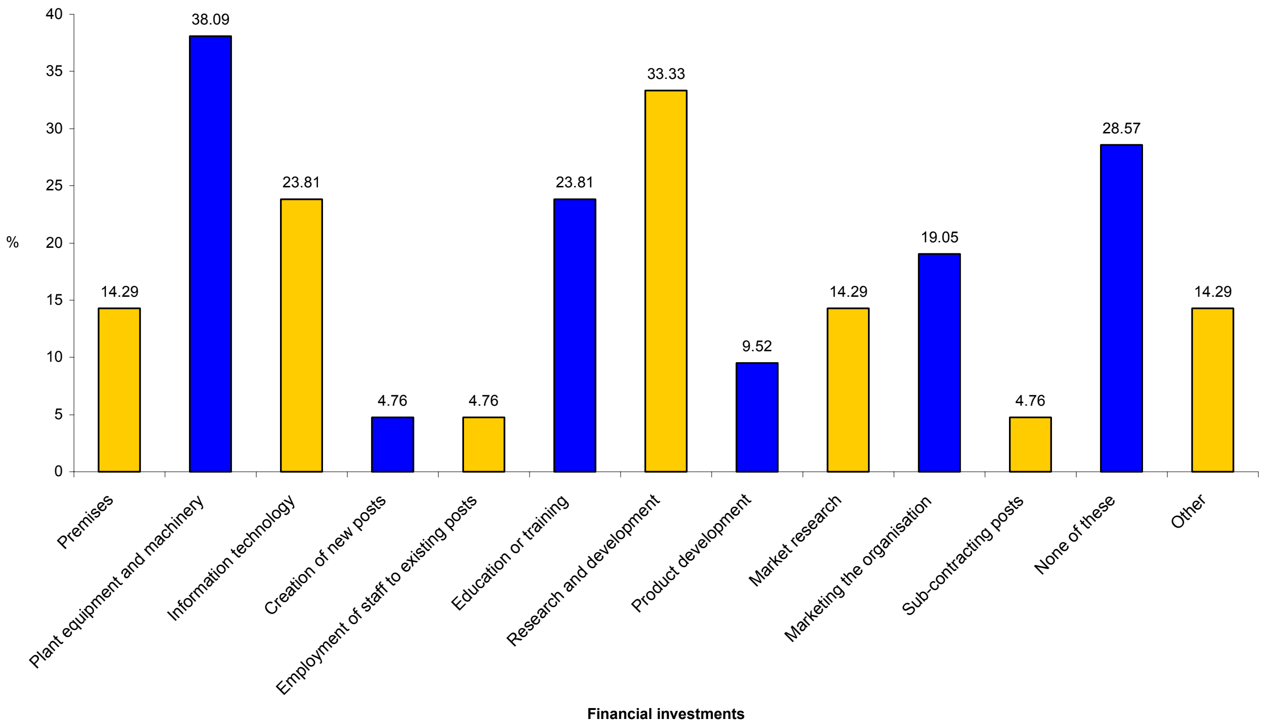
Despite the visual arts sector not currently being lucrative through the sale of the main visual arts practise, little intervention by grant subsidiary providers is aimed at developing this creative industry sub-sector in the Bolton location. Furthermore, with regard to financial sponsorship only one visual arts enterprise (4.76%) stated that they did receive financial sponsorship provided solely by the local authority. Similarly, the number of enterprises in receipt of services in kind provided by other businesses or organisations proved to be significantly low (14.29%). Of those businesses that did receive financial sponsorship this was provided by private individuals (25%), charity (25%) and educational institutions (50%).

Having reviewed all the financial support available to visual arts businesses, it is evident that the sector is not lucrative by the creation and trade of visual arts activities and there is little evidence to support the notion that other types of organisations are financially supporting this industry.

Artists were also asked to confirm which areas they had financially invested into to support the development of their business. Plant equipment & machinery (38.09%) and Research and Development (33.33%) were the main priorities for investment. A range of other areas were identified and are presented collectively in Figure Twelve.

However, it is worth noting that 28.57% confirmed that they had not financially invested into any area.

Figure Twelve – Financial Investments

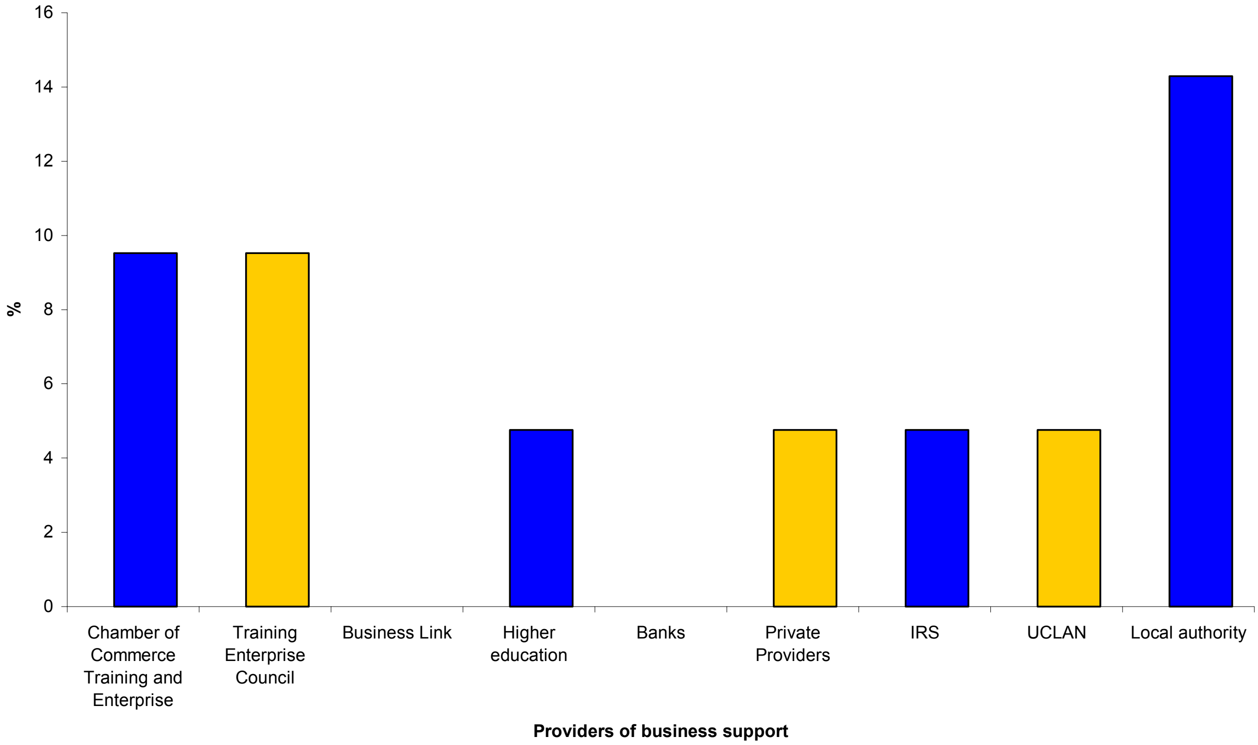


With regard to the development of visual arts businesses, the issues of most concern to the majority of businesses are finding new customers (76.19%), sourcing funding to support creative activity (57.14%) and promoting the organisation / business (52.38%). Little evidence has been found to support the notion that visual arts enterprises are penetrating markets beyond the North-West region. It is expected therefore that finding new clients and marketing the enterprise are of most concern to artists.

57.14% of visual artist indicate that sourcing funding is a concern.

The visual arts enterprises were asked to consider whether they had received business / organisational support from a list of given agencies that are typical providers of support for business development. Two thirds (66.66%) of the sector confirmed that they did not receive any type of business support. The greatest amount of business support received by the sector was provided by the local authority (14.29%), however other providers of support were also sourced and are described in Figure Thirteen. What is particularly interesting is that the University of Central Lancashire (UCLAN), a Preston based institution, was the only educational provider found to be supporting a Bolton-based visual artist. Further investigation is required to elicit how further and higher educations in the Bolton location are supporting visual artists in the area.

Figure Thirteen–Providers of Business Support



Although the number of businesses in receipt of business support is low, 71.43% of those confirmed they were satisfied with the appropriateness and quality of the business support provided, whilst 28.57% remained unsure.

Geography and Markets

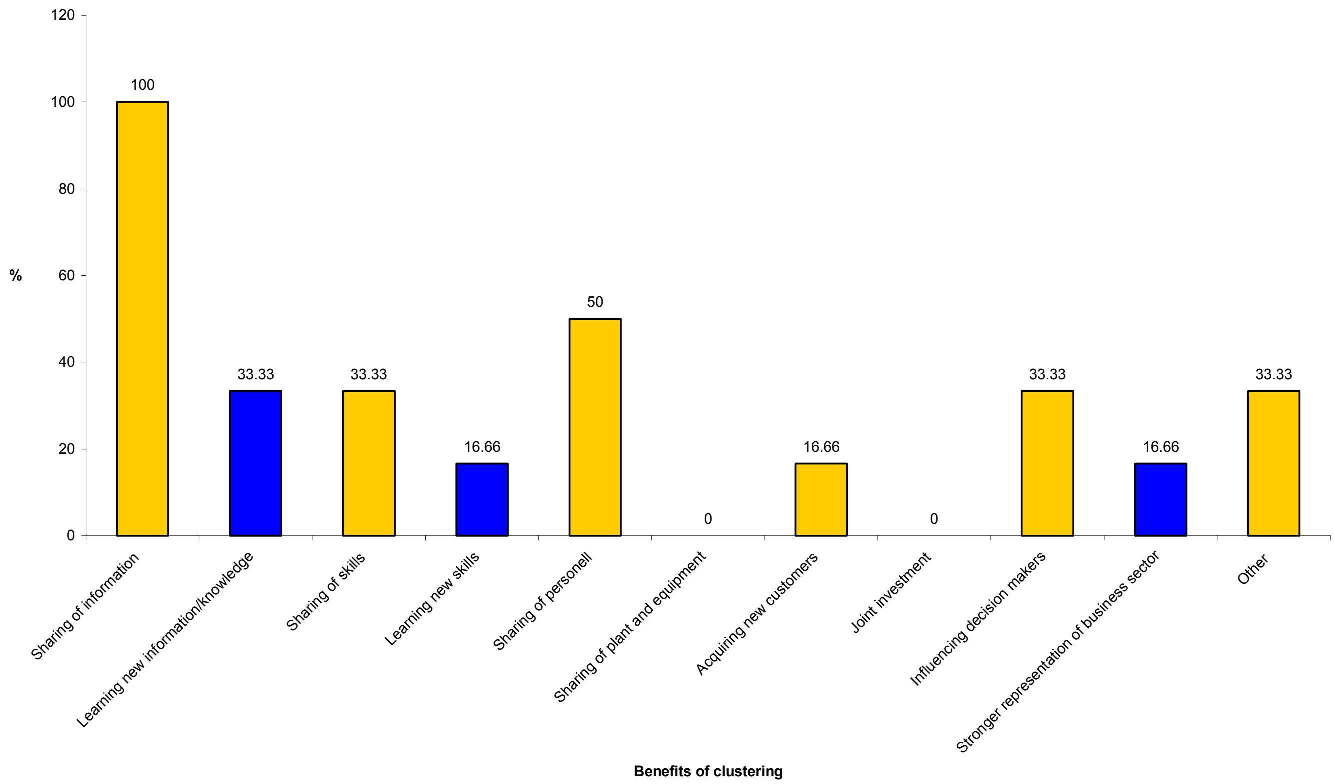
28.57% of the sector sampled confirmed that they were geographically situated within close proximity to businesses of a similar nature. Representing just under a third of the sector, this may be reflective of the workspace that is available to accommodate creative industries businesses in Bolton.

Table Six - The Number of Enterprises that are physically located to businesses of a similar nature

Percentage of Visual Arts Enterprises <u>that do</u> physically cluster	**Percentage of Visual Arts Enterprises <u>that do not</u> physically cluster**
28.57%	71.43%

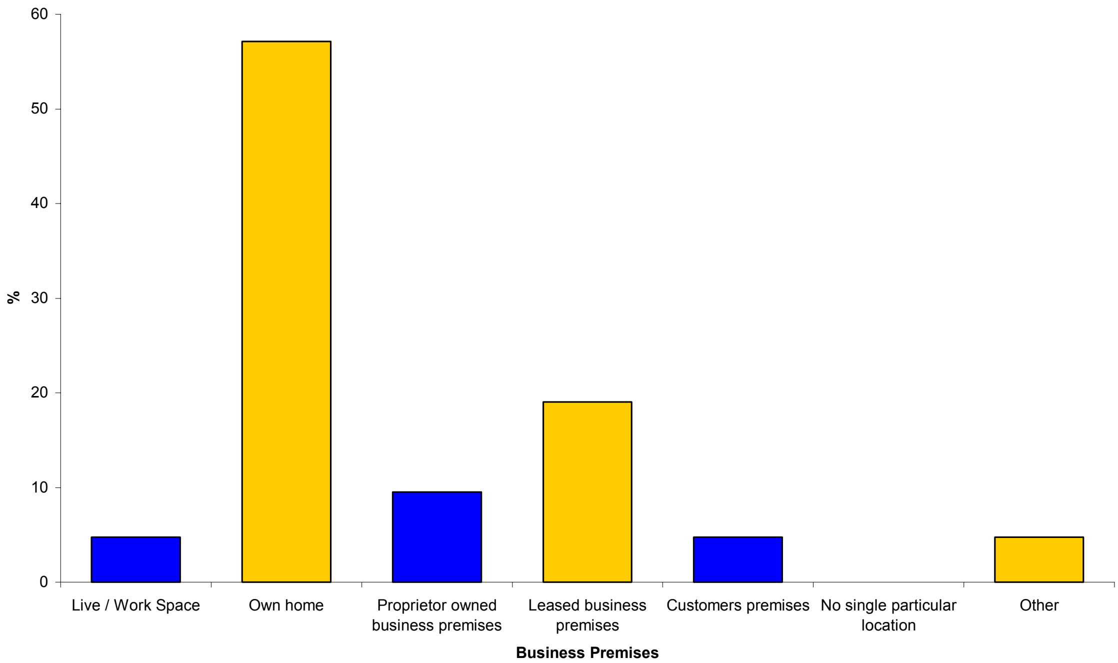
A range of benefits derived from this type of clustering were recognised by those businesses that do cluster. 100% of those companies that do cluster confirmed that they benefit from the sharing of information. Furthermore, an additional 33.33% confirmed that learning new information / knowledge, the sharing of skills and influencing decision-makers were also beneficial.

Figure Fourteen – The Benefits Derived from Clustering



The majority of the visual arts enterprises (57.14%) sampled confirmed that their own home serves as the main type of business accommodation. Leased business premises are the second most popular type of business premises (19.05%). Further types of premises were also indicated and are presented in Figure Fifteen.

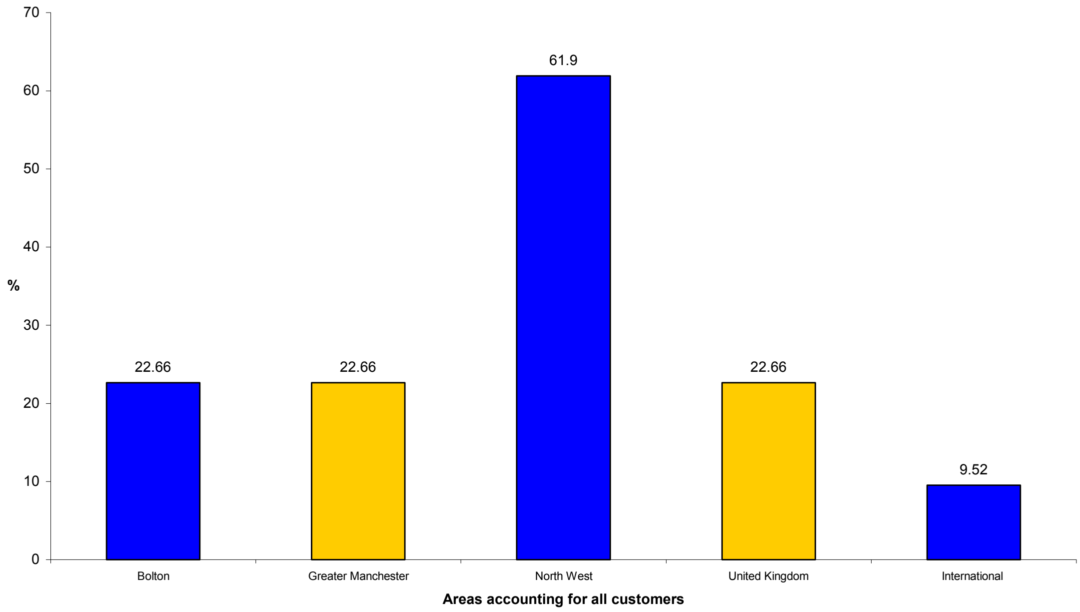
Figure Fifteen– Main Types of Accommodation for Visual Artists



All of the businesses sampled confirmed that they were operating a business based in the Bolton location, with a clear majority (80.95%) of businesses operating from one site. Of all the enterprises that completed the survey 85.71% confirmed that they only have sites in Bolton, the remaining 9.52% confirming they have additional sites in the North West and Greater Manchester.

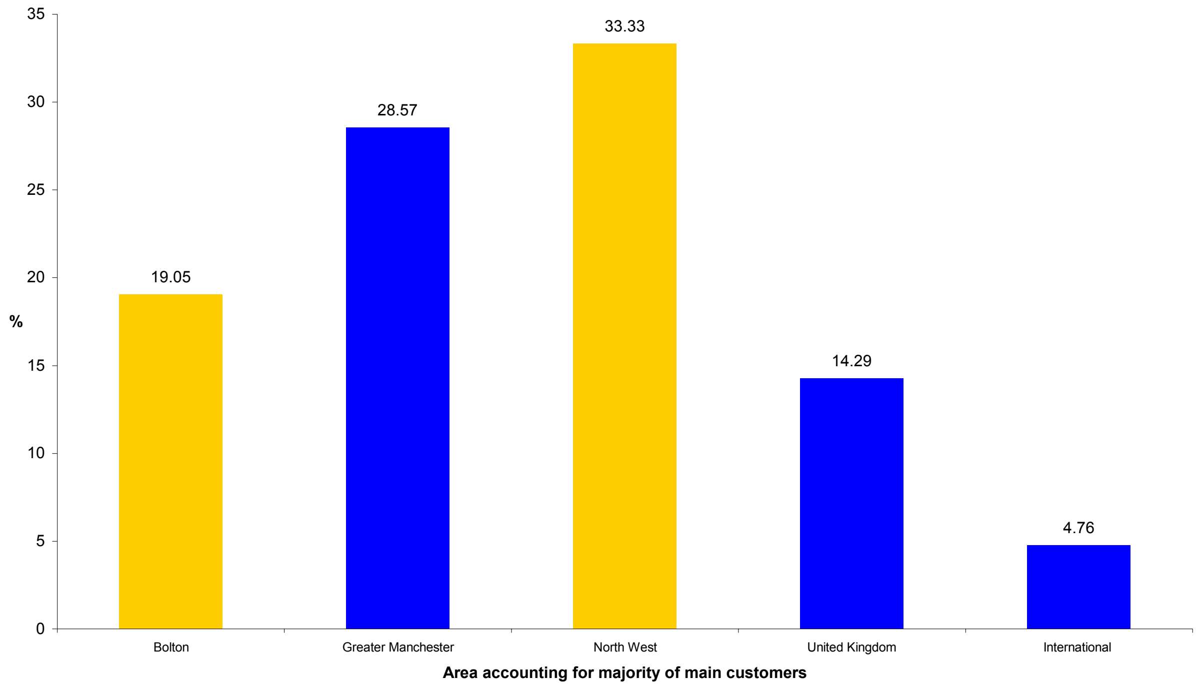
With regard to markets, visual arts enterprises in Bolton engage with markets primarily across the North West region (61.9%) and with markets in Bolton (22.66%), Greater Manchester (22.66%) as well as the UK (22.66%) with International engagement being the weakest market (9.52%). This points to a strong local and regional base and an impressive penetration of the UK market, however a significant weakness in exporting.

Figure Sixteen – Areas accounting for all Customers



The geographic areas accounting for the majority of their main customers are across the North West region (33.33%) and within the county of Greater Manchester (28.57%). Although 19.05% of the sample stated that their main customers are based in Bolton, further work is needed to reflect the longevity of the businesses in relation to this. For example, it is worth considering whether businesses that have been established for a substantial length of time are surviving mainly from trade within the Bolton location on a long-term basis, or whether this represents more recently established businesses that are yet to penetrate markets beyond the immediate location.

Figure Seventeen– Areas Accounting for the Majority of Main Customers



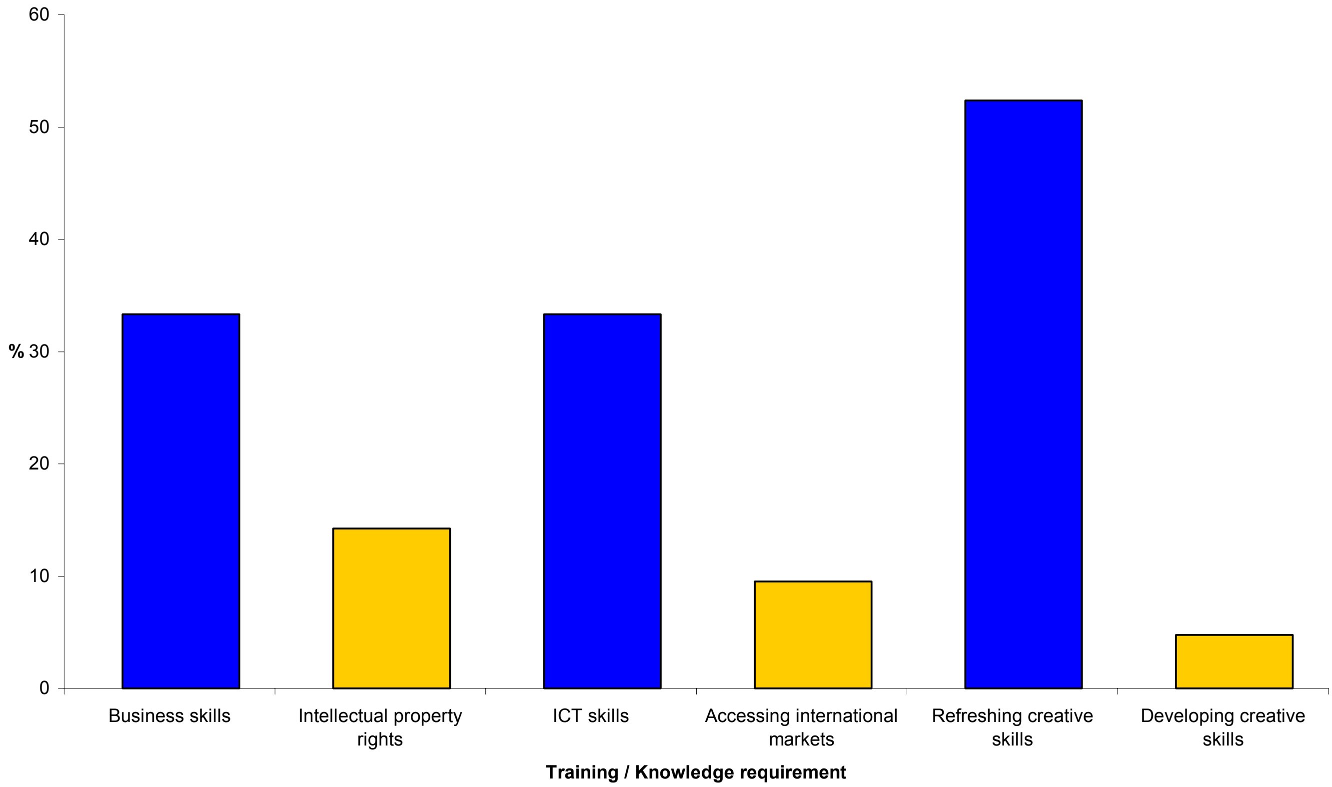
When considering the location of main customers for visual arts trade at a national and international level, it is particularly noticeable that there are very few visual arts businesses in Bolton accessing these existing markets. Only 14.29% of visual artists in Bolton consider that the main customers are based at a national level. Furthermore, only one visual arts enterprise (4.76% of the sample) considers their main customer to be an international client. This confirms the earlier findings, with the dominant markets located in Bolton, the region and the UK.

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

All the businesses surveyed were asked to consider which training and knowledge requirements were they most likely to require in the forthcoming six-month period. The majority of businesses (52.38%) confirmed that refreshing creative skills was of most importance to them.

Developing business skills and ICT skills were of equal importance to 33% of the sample. Interestingly, despite such a low number of businesses previously proven to be penetrating international markets (9.52%), only 9.52% of visual arts enterprises stated that they were interested in furthering their knowledge in this area.

Figure Eighteen – Training and Knowledge Requirements of Visual Arts Business



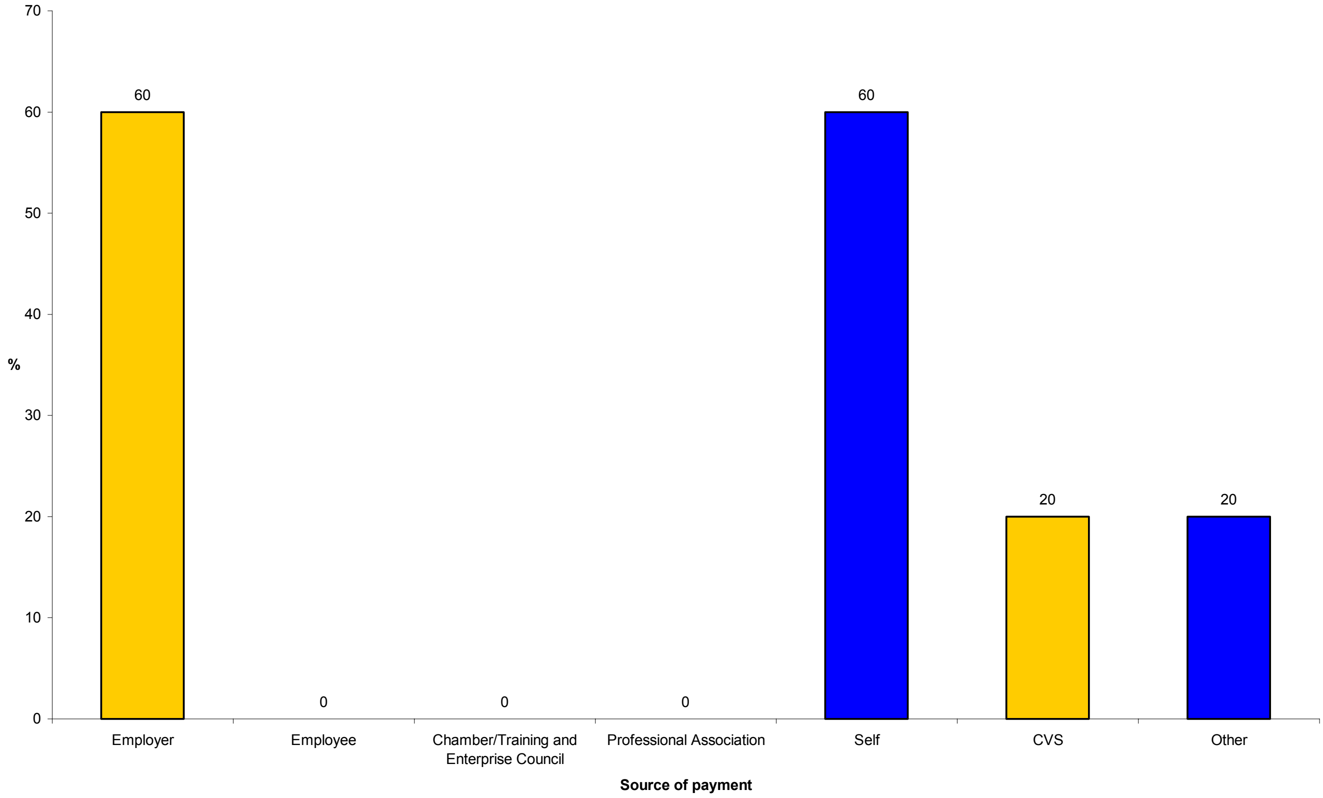
Of the visual arts businesses surveyed 23.81% confirmed that they had engaged in retraining activities as described in Table Seven.

Table Seven – Number of businesses in receipt of training

Percentage of business in receipt of training	Percentage of businesses who are not in receipt of training
23.81%	76.19%

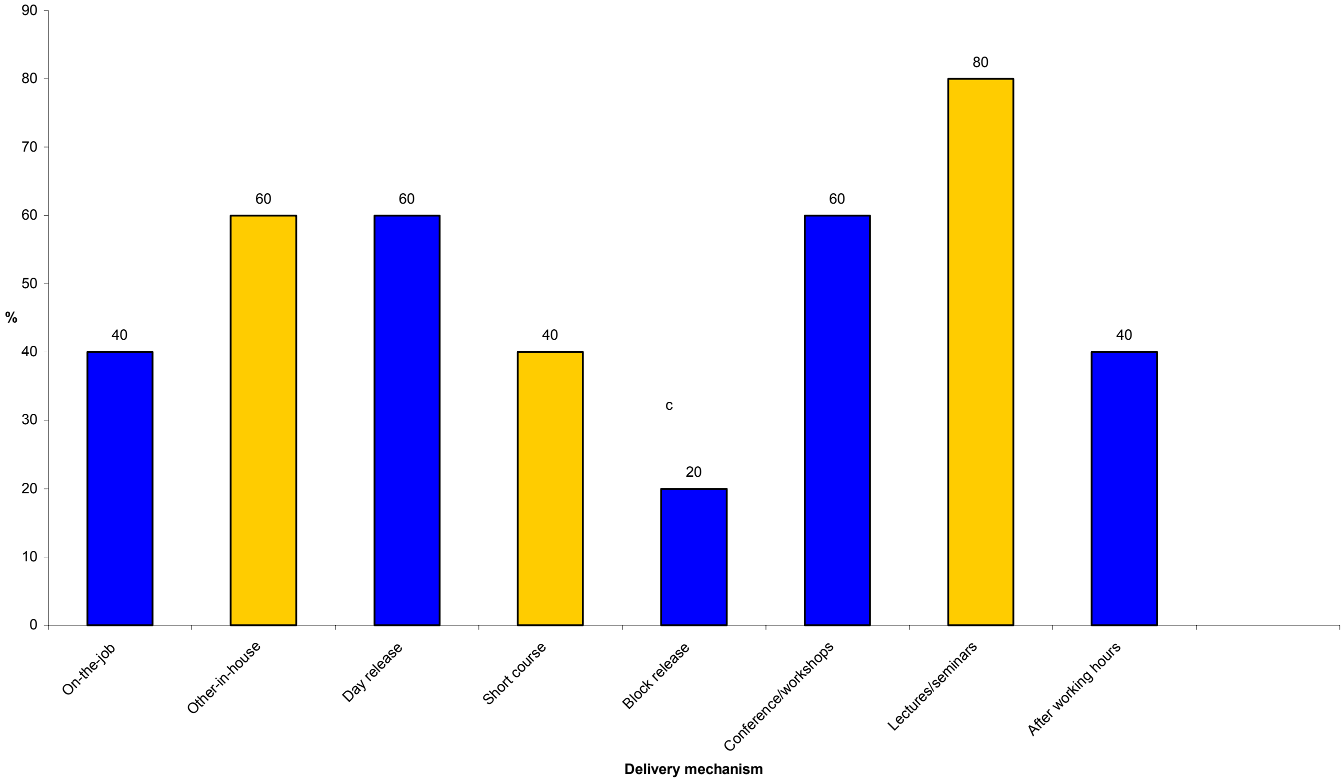
Of those businesses in receipt of any type of training 60% of visual arts businesses and 60% of employers paid for it themselves. In addition, there was a limited amount of financial investment available from other sources. This is presented in Figure Nineteen.

Figure Nineteen – Financial Investment into Training



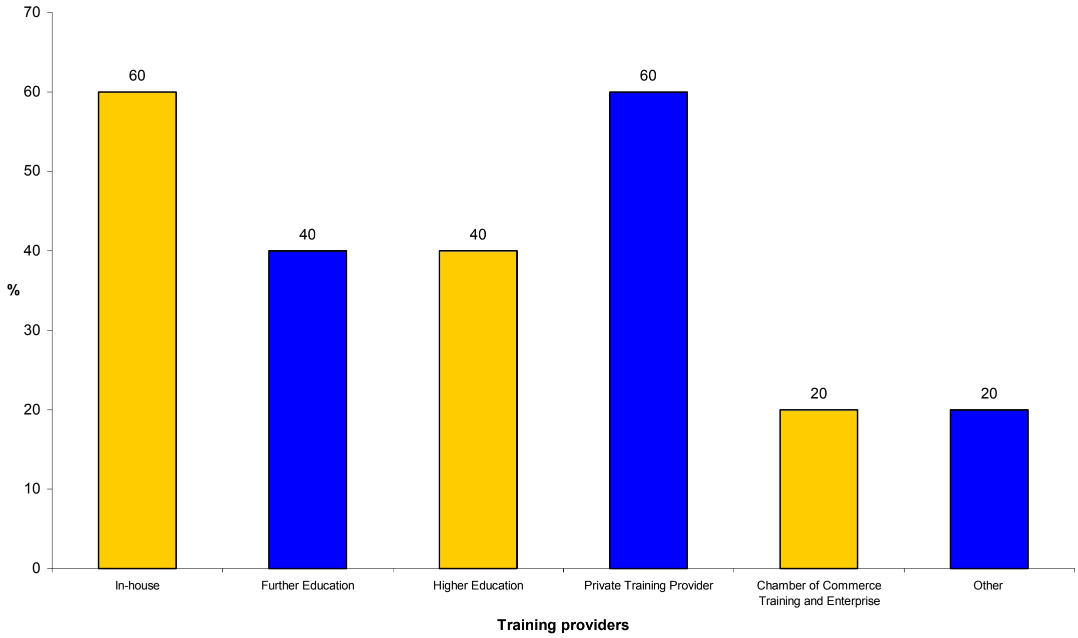
The visual artists who were surveyed indicated that their favourite mechanisms for delivery of training were through lectures and seminars. However the total range of training mechanisms accessed by artists was varied. These are presented collectively in Figure Twenty.

Figure Twenty – Training Delivery Mechanisms



In-house training providers and private training providers are the main providers of training activities in Bolton, equally delivering 60% of all training received by the visual arts sector. Further and higher education institutions equally deliver training to 40% of the sector, indicating that visual arts businesses marginally prefer the specialist training supplied by training providers specific to the sector. A complete analysis of all training providers is presented in Figure Twenty-One.

Figure Twenty-One – Describing the Range of Training Providers to the Visual Arts Sector



100% of visual arts businesses confirmed that they were satisfied with all types of training that they received.

The Bolton Baseline Analysis for the Visual Arts Sub-Sector

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 inquiries. The data collected was then analysed using SPSS statistical analysis and Microsoft Excel. A database of practicing visual artists in the Bolton location was formulated sourced primarily from local authority databases and supported by information supplied by the Arts Council of England. The aim was to produce an accurate database of visual artists practicing within the year ending the 30th April 2005.

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 Metropolitan Borough Council).

Upon the implementation of the survey, follow up telephone inquiries of non-received responses enabled the database to be thoroughly screened. Artists, who were no longer trading, had relocated to areas outside of the Bolton location or whose main creative activity was not within the parameters of the stated definition of visual arts were removed from the sample. This established a database confirming 134 artists 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, titled Essential Facts: The Nature of Designer Fashion and its Markets. The survey had also been used by Roodhouse and Johnstone in their Micro Primary Baseline Analysis of the Graphic Design sub-sector in Bolton. As this study focuses on the visual arts sub-sector, multiple choice questions were replaced with options relating to activity relevant specifically to the visual arts sub-sector. A common definition of activity within the visual arts 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 Arts Council England, The Visual Arts Association and A-N Artist Information Company.

The questionnaire was constructed using closed multiple-choice questions, and on most issues, the respondents were provided with the option to choose 'other', and space provided to give 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 in previous studies of a similar nature.

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 a sample size of this proportion the target response rate was 10%.
In total, 21 businesses responded to the questionnaire, representing 15.67% of the total sample, 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 inquiries confirmed these and the questionnaire was re-implemented. Furthermore, the questionnaire was also resent by email to outstanding recipients, which 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 visual artists, and confirmed the nature of the study and the essentiality of their participation. Approaching artists in this way proved relatively successful and increased the number of responses gained.

In this study using follow-up telephone inquiries and email correspondence proved a useful way of determining why some responses were not gained. For example, some artists are no longer trading or which have relocated outside of location Bolton and surrounding wards.

Future Research
As with any study this research bares limitations, however meets the initial and stated aim of presenting an accurate account of the visual arts industry in Bolton, in the year ending 30th April 2005.

However, there are numerous issues which require further analysis to fully understand the nature of the industry, which mainly lie within the understanding of its infrastructure.

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

As the initial baseline analysis of the visual arts industry conducted at such a micro-level, the study is a useful indicator of the health of the visual arts industry in Bolton, 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, with specific consideration to social and geographic profiles.

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