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Buckinghamshire Arts Partnership
Creative Industries' Audit

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1 Executive Summary

1.1 Aims and Methodology

David Powell's 2002 report[1]suggested that there is sometimes a lack of cohesion in support for the creative industries across the South East region. This view was shared by Buckinghamshire Arts Partnership (BAP), who were also mindful of the possibility that Buckinghamshire in particular also misses out on inward investment in the arts.[2]

With this in mind, BAP commissioned research to provide an in depth knowledge and understanding of the creative industries in Buckinghamshire and to generate a database that would form the foundation for the development of a creative industries' website.

The research involved four areas:

- Level One: purchase of data from the National Business Database
- Level Two: the gathering of information about enterprises not registered for VAT
- Level Three: in depth research about the support needs of a sample of organisations
- Consultation with Steering Group Members

The work defined creative industries in line with the DCMS definition which includes a wide range of enterprises which feature original creativity and generate intellectual property with the potential for wealth and job creation. This includes enterprises across the production cycle, including creation, production, distribution and consumption (see appendix for full details).

The resources allocated to this creative audit comprise 18 days from an associate and 22 days from the lead consultants..

1.2 Key Findings

This audit has located 1,729 creative enterprises in Buckinghamshire, employing an estimated 94,281 people with an estimated total turnover of £3bn.

The largest domain by number of enterprises is the Visual Arts overall, and in Aylesbury Vale and Chilltern. In South Bucks and Wycombe the largest domain is Audio-Visual.

Across the County the Audio-Visual domain accounts for 65% of the £3bn turnover, and Books and Press account for 29%. Heritage, performance and the visual arts account for the remaining 6%.

Number of creative enterprises including Heritage

	No. of enterprises	% of enterprises
Aylesbury Vale	519	30%
Chiltern	365	21%
South Bucks	307	18%
Wycombe	532	31%
No location (eg PO box)	6	0.3%
Total	1729	

[1] David Powell, *Creative and Cultural Industries: an economic impact study for South East England (2002)*
[2] 0.36% of Arts Council South East's investment in Regularly Funded Organisations in 2005/06 and 9% of its Grants for the Arts funding in 2003/04 went to individuals and organisations based in Buckinghamshire.

Estimated number employed by creative enterprises

	No. of employees	% total employees
Aylesbury Vale	29,770	32%
Chiltern	24,462	26%
South Bucks	8,635	9%
Wycombe	31,415	33%
Total	94,281	

Estimated turnover

	Turnover ('000s) £	% total turnover
Aylesbury Vale	871,856	28%
Chiltern	765,771	25%
South Bucks	415,076	13%
Wycombe	1,036,046	34%
Total	3,088,748	

Enterprises by cultural domain

Local authority	Audio-Visual		Books and Press		Heritage		Perfor-mance		Visual Arts		Total	
Aylesbury Vale	163	26%	49	26%	17	35%	54	30%	214	31%	497	29%
Chiltern	102	16%	52	27%	10	20%	36	20%	164	24%	364	21%
South Bucks	137	22%	30	16%	8	16%	31	17%	99	15%	305	18%
Wycombe	208	33%	61	32%	12	24%	55	30%	193	28%	529	31%
No location	3	0.5%	0	0%	0	0.0%	2	1%	1	0.1%	6	0.4%
Total	627		192		49		181		680		1701	

Estimated turnover by cultural domain

	Turnover ('000s) £	% total turnover
Audio-Visual	1,999,889	65%
Books and Press	908,536	29%
Heritage	37,548	1%
Performance	23,123	1%
Visual arts	119,653	4%
Total	3,088,748	100%

The in-depth telephone research into support needs resulted in findings wholly consistent with those of Ancer Spa's *Strategic Framework and Action Plan for Development of the Creative Industries in South East England. (Comments on the specific findings of this audit are italicised)*

- Access to short courses on business skills, including specialised marketing. *There were significantly more requests for individually tailored surgeries than training. Those respondents who had not received business skills training did not perceive the need for it and those who had were generally satisfied.*
- Specialist technical support and related technological developments. *Particularly technical advice and support for the development and maintenance of websites and related technology such as on-line sales.*
- Specialist business advice, mentoring from practitioners with good contacts and strong market-knowledge.

- Opportunities for regular networking, particularly physical meetings. *Physical meetings were a consistent request as current provision was perceived as not meeting the needs of professional artists and enterprises with ambitions for growth. "Our network is dominated by hobbyists."*
- Ability to recruit part-time and freelance workers to cope with peaks in demand.. *The focus from this sample was more about the bureaucracy associated with employing people for the first time as the added administration burden cancels out the added staff time.*
- Access to affordable workspace.. *This was an issue for visual artists and crafts makers and is endorsed by the HE institutions.*
- Support and advice on protecting IPR and access to finance. *Access to finance was an issue across the sample. IPR was not mentioned as an issue but this is not surprising as the sample had a predominance of makers of one-off art works and objects. The designers and film and television production companies in the sample, for whom this would be an issue, were not interested in participating in the research for the reasons stated above.*

The research found that there is a need for specialist support for creative enterprises with high growth potential. This is consistent with the findings of the Creative Economy Programme Access to Finance and Business Support Working Group.

The consultation with steering group members found the following:

- Individual steering group members value the networking opportunities provided by BAP.
- Steering group members value BAP most when it adds value to their own work.
- The gap between the priorities of different steering group partners is considerable.
- There is synergy between the district councils consulted.
- Steering group members would like BAP to have a clear direction.

1.3 Recommendations

This research has identified 1,729 creative enterprises in Buckinghamshire, employing an estimated 94,281 people with an estimated turnover of £3bn. In addition, this research has confirmed that the support needs of creative enterprises across the South East are largely true of those based in Buckinghamshire.

In order to support those creative enterprises effectively BAP requires a clearly defined strategic direction that is supported by every member of the steering group. This report proposes two possible strategic directions, with a third option that combines the two.

Using the outputs from the research

- BAP makes the statistical database available to each steering group member for their own analysis, as required.
- The statistical database from the project is compared with the comparative database produced through the MKSM creative audit to build a more complete picture of a sector that crosses administrative boundaries.
- BAP uses and develops the contact database in a way that fits with its agreed strategic direction.

Defining a strategic direction for BAP

- BAP commits to deciding upon a strategic direction that adds value to the work of each of the five local authorities, ie enabling them to achieve things they would not otherwise be able to working alone.
- .BAP steering group members agree whether they are largely about 'the arts' or largely about 'the creative industries' when considering the strategic direction of BAP.
- The strategic direction is informed by the MKSM creative audit and is supported by SEEDA and ACE South East.
- BAP ensures that all steering group members buy into the DCMS definition of the creative industries.
- BAP agrees to only provide projects directly where there is no other appropriate delivery mechanism already in existence.

Possible options

BAP becomes an advocate for the creative industries (including the arts and crafts) and heritage in Buckinghamshire.

- At a regional level, BAP becomes the first point of contact between the regional players and the five local authorities as regards the cultural industries, specifically the creative industries (including arts) and heritage. This would make it straightforward for the county to engage with and be consulted by SEEDA, ACE South East, the regional cultural consortium and other regional players.
- In addition, BAP would act as a first point of contact between the national cultural agencies involved in the DCMS/DCLG agreement, 'Where We Live' around sustainable communities and the five local authorities. This would be a catalyst for the local authorities levering additional resources into the county.
- At a County and District level, BAP would work with key decision-makers within each local authority, both elected members and the executive, to help them make effective use of the creative industries (including the arts) and heritage to achieve their objectives including, for example, those stated in Buckinghamshire's Community Plan and the Local Area Agreements.
- At a local level, BAP would work with individual local authorities to help them build the capacity of the arts within their area.
- This strategic direction would probably involve each of the five local authorities increasing their investment in BAP to around £12,000 each per annum, with the possibility of £20,000 from ACE South East through Grants for the Arts or managed funds. The rationale for increasing investment in BAP would be that by working together at a strategic level the size of the cake would increase and as a result each local authority would see a greater level of investment in the creative industries and heritage in their district over a three-year period.

BAP becomes a business support unit for a defined sub-set of the creative industries.

- BAP would develop creative businesses in Buckinghamshire with a particular focus on potential and existing freelancers, sole traders and small businesses (up to 10 staff) working in the Visual Arts (including artists, designers and craft makers), Performance domains and in digital media. The film and television sectors already have a highly developed support infrastructure that covers the whole range of enterprises from pre-start up to multinationals.
- This audit has demonstrated the size of the creative industries in Buckinghamshire. The Creative Economy Programme's Access to Finance and Business Support Working Group has concluded that:

- 'The creative industries are capable of increased productivity and growth. However, creative businesses are only likely to make this contribution if they receive the appropriate forms of advice, support and investment.'

The CEP report also recommends that creative businesses with a high potential for growth (about 5%) are given business accelerator services, which may fit well with the brief of StART.

- StART MK is a creative industries business advisory support (CIBAS) unit located in Milton Keynes and supported by a number of partners, including ACE South East. To build on the success of StART, and support its development, it would be sensible to explore the possibility of investing in StART to allow its brief to include the creative industries in Buckinghamshire.
- The government is committed to streamlining government support for small businesses through the Business Support Simplification Programme, in which SEEDA is taking a lead role. The programme involves reducing the number of schemes from around 3000 to 100. Again, this would support the case for working collaboratively with an existing creative industries support unit, namely, StART.
- Creative Leicestershire and CIDA are models worth considering. These units provides a range of business support services including e-bulletins, one-to-one advice, funding, niche training, networking events, promotional projects, workspace development, HE and FE support and advocacy work. These services complement and work in tandem with the support services of Business Link and the relevant local authorities.
- BAP would be attentive to the contribution that the creative industries make to the regional economic strategy for the South East:
  - Global competitiveness: investment in success
  - Smart growth: lifting underperformance
  - Sustainable prosperity: supporting quality of life
- StART has cost approximately £60,000 to operate over an 18 month period, that is to say, around £40,000 per annum. Thus each local authority could contribute £8,000 each to double the annual operating costs, with an additional £20,000 requested from ACE South East or SEEDA.

BAP becomes an advocate for the creative industries and heritage in Buckinghamshire and contracts StART to support the creative industries in Buckinghamshire.

- This is a more ambitious step that would result in achieving both the previous strategic directions. While it will be a more expensive option, it also offers the potential of high returns and a more rapid rate of success.
- With this option BAP sets itself up as a unit described in the first option. This unit will be engaging with regional players to maximise inward investment for the county in terms of the development of the arts and creative industries. Across the county, it will be working with elected members and senior executives to help them use the arts and creative businesses to achieve the economic and social objectives enshrined in the local area agreement and community plan. It will also work with individual authorities to help them build capacity at a grass-roots level.
- In addition, the unit will manage the service level agreement between StART and the five local authorities of Buckinghamshire. Through this agreement, the scope of StART is extended to include the creative industries across Buckinghamshire.
- This option, which effectively combines the options summarised in the first two options, would cost each local authority around £20,000.

2 Project Aims and Methodology

2.1 Resources

This project comprised 22 days from the lead consultants and 17 days from the researcher between March and June 2007.

2.2 Project aims

The project had two core aims:

- To generate an advocacy tool that can be used by BAP collectively and by individual BAP members to make the case for further investment in and cultivation of the creative industries in Buckinghamshire.
- To identify an achievable strategic direction for BAP to further support the creative industries in Buckinghamshire.

2.3 Outputs

The project had three core outputs:

- The geographical mapping of the creative industries in Buckinghamshire.
- A database of creative industry contacts.
- A report proposing an achievable strategic direction for BAP.

2.4 Methodology

2.4.1 Level One Research

This data was purchased from the National Business Database (NBD) which means that it can be used for analysis as required, and BAP has the option of writing to each contact once before 4 August 2007 to solicit opt-ins to the planned BAP database and website (outside the remit of this project).

The data included enterprises of all sizes that have either registered for VAT or have a Yellow Pages or Thompson Directory entry. They were selected by 1992 SIC code[3] or Yellow Pages or Thompson Directory classification. The criteria for inclusion were that they should fall within the DCMS definition of the creative industries:

'..those goods and services in the creative sector ... which feature original creativity and generate intellectual property with a potential for wealth and job creation.'[4]

This includes:

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[3] Standard Industrial Classification: a system of classifying types of business in widespread use in economic and statistical surveys. The appropriate code is selected by whoever completes the registration with and annual return to Companies House and seems to cause considerable confusion (see section 4)

[4] Consulted 23/5/07 at http://www.culture.gov.uk/www.culture.gov.uk/Templates/Publishing/Research.aspx?NRMODE=Published&NRNODEGUID=%7bC0E53EED-B0BD-41ED-BC1D-B717723781A1%7d&NRORIGINALURL=%2fReference_library%2fResearch%2fdet%2fglossary_abbreviations%2ehtm&NRCACHEHINT=NoModifyGuest#thec

- Advertising
- Architecture
- Art and antiques
- Crafts
- Design
- Designer fashion
- Film and video
- Interactive leisure software
- Music
- Performing arts
- Publishing
- Software/computer games
- Television and radio

In addition, BAP requested the addition of enterprises falling within the Heritage domain including:

- Libraries
- Museums
- Archives
- Historical monuments and buildings

The enterprises have a listed business address that falls within the boundaries of the local authority districts of Aylesbury Vale, Chiltern, South Bucks and Wycombe.

The information collected comprised:

- Contact name
- Organisation name
- Address
- Postcode
- Turnover
- Number of employees
- Four digit 1992 SIC Code and text

The report refers to 'creative enterprises'. This comprises businesses, partnerships, sole traders and other individuals working in the creative industries.

2.4.2 Level Two Research

The Level One research was supported by 12 days of telephone research to identify individuals and enterprises below the VAT threshold, that is to say, enterprises that would not be on the NBD. This research used the contacts provided by members of the BAP steering group as a starting point, and used a snow balling technique to develop new contacts. 430 calls were made generating 167 individuals and enterprises.

Thus this research included enterprises falling into the categories described in Level One engaged in creation (all sizes) or in small scale or craft production (e.g. a recording studio, a theatre etc but not an enterprise engaged in mass production). The criteria include individual professional or aspiring professional creators and producers who self-select as running a creative business. Any additional enterprises of all scales are involved directly with both creator and consumer. For example, this would include a gallery displaying craft-produced furniture for sale. It would not include a furniture shop as a process of industrial-scale production and distribution separates the creator and consumer.

The information collected comprised:

- Contact name
- Address
- Postcode
- Category of enterprise (as Level One)
- Main areas of business
- Turnover
- Number of Employees
- Time trading
- Website address (if any)
- Consent to join database and receive information from BAP
- Consent to be on proposed website
- Consent to participate in Level Three research

2.4.3 Level Three Research

This final part of the research comprised telephone research to a sample of 56 individuals and micro-enterprises across the four districts engaged in creation or production.

The information collected comprised:

- Contact name
- Address
- Postcode
- Category of enterprise (as Level One)
- Main areas of business
- Turnover
- Number of Employees
- Time trading
- Website address (if any)
- Qualitative and quantitative data exploring support needs

The questionnaire used is available as an appendix.

2.4.4 Consultation with Steering Group Members

Extended telephone consultation with each steering group member was undertaken to obtain an in-depth understanding of their individual contexts, goals and aspirations for BAP

3 Quantitative Research (Levels One and Two)

3.1 Scope of the audit

The data gathered in Level One and Level Two were aggregated. The selection of enterprises according to Yellow Pages or Thompson Directory classifications as well as SIC codes brought to light an unexpected issue, Sampling of the data for quality control purposes indicated that the SIC coding of enterprises was unreliable, for example, the group of what were clearly graphic design companies had been given no fewer than eleven different SIC codes.[5] Research was therefore undertaken to identify the main business activity of each enterprise, including those Level Two enterprises not available to take part in the telephone survey.

Each enterprise was allocated to one of the four domains identified by the DCMS as comprising the creative industries:

- Audio-Visual
- Books and Publishing
- Performance
- Visual Arts

Those additional organisations and enterprises from the Heritage domain requested by BAP were grouped as such. A more detailed activity category was then allocated aggregating to those set out by the DCMS. Illustrations of the types of activity included in the DCMS definitions can be found in Appendix 7.3.

The additional research also enabled the enterprises to be categorised according to the six stages in the process of cultural production identified by the DET:

- Creation
- Making
- Dissemination
- Exhibition/reception
- Archiving/preservation
- Education/understanding

Although the domains and categories used in this audit aggregate to those used by Ancer Spa in its report, *Strategic Framework and Action Plan for Development of the Creative Industries in South East England,* the methodology for deriving these domains and categories are different.

Ancer Spa used the methodology adopted by the DCMS in its Creative Industries Economic Estimates. This is based solely on SIC codes and is problematic because the creative industries are not easily defined using such codes. Many codes encompass both creative and non-creative enterprises. The DCMS therefore applies weightings to estimate the proportion of each category that should be included in any analysis of the sector. Ancer Spa point out that these weightings are not

---

[5] 2524 – Manufacture Of Other Plastic Products, 3002 - Manufacture Of Computers And Other Information Processing Equipment, 3663 - Other Manufacturing Not Elsewhere Classified, 5156 Wholesale of Other Intermediate Products, 5190 – Other Wholesale, 7260 - Other Computer Related Services, 7440 – Advertising, 7484 - Other Business Activities Not Elsewhere Classified, 7487 – Other Business Activities, 9231 - Artistic and Literary Creation and Interpretation, 9305 - Other Service Activities Not Elsewhere Classified. The range of error might lead one to speculate that this is not just the result of inaccurate coding on Companies House returns but also the purchase of 'of the shelf' limited companies.

published, that the DCMS does not always know how the weighting has been derived and that they have changed considerably between analyses.[6] Reliance on SIC codes also means the exclusion of enterprises neither registered for VAT nor as limited companies. As this audit has discovered, it also excludes large numbers of enterprises that have been miscoded.

Ancer Spa also expressed concern about including mainstream software and computer services within the creative industries. They report that there is considerable debate about whether this is appropriate and suggest that the sheer size of the sector could, if included, be misleading.

As the current audit focuses at county level, the number of enterprises to be analysed is correspondingly smaller than in the Ancer Spa audit for the South East region. It was therefore decided not to use the DCMS weighted SIC code process. Instead, the research into the main activity of each enterprise was used to identify whether it fell into the DCMS definition of a creative industry and to allocate domains and categories of activity. Mainstream software and computer services were excluded.[7] This approach has also enabled the identification of crafts and design enterprises for which no identifiable SIC codes exist and which were therefore a significant omission from the Ancer Spa research. This leads to a more accurate method of calculating the actual scope of the creative industries in Buckinghamshire.

A comparison between the results of the two methodologies can be seen overleaf, with the categories from this audit aggregated to fit the Ancer Spa sub-sectors. Note that the Ancer Spa data is derived from the Annual Business Enquiry 2004 which suppresses data where fewer than 50 businesses occur in a sub-sector (indicated *).

Percentages have usually been shown to the nearest whole number thus tables will not necessarily add up to 100%.

[6] Ancer Spa, *Strategic Framework and Action Plan for Development of the Creative Industries in South East England*, 2006, p97

[7] This data is available for analysis, should BAP steering group members require it

Table 1: Ancer Spa Analysis of Creative Sub-Sectors by Local Authority Areas 2004[8]

	Total	Advertising	Architecture	Art And Antiques Trade	Designer Fashion	Video Film And Photography	Music And Visual And Performing Arts	Publishing	Computer Games, Software And Services And Electronic Publishing	Television and Radio
Aylesbury Vale	672	*	56	*	*	*	122	*	335	*
Chiltern	645	56	*	*	*	*	156	*	280	*
South Buckinghamshire	529	*	*	*	*	95	107	*	198	*
Wycombe	942	62	64	*	*	51	146	*	535	*

Table 2 Henderson Aplin Partnership Aggregation of Activity Categories by Local Authority Areas to enable comparison with Ancer Spa analysis

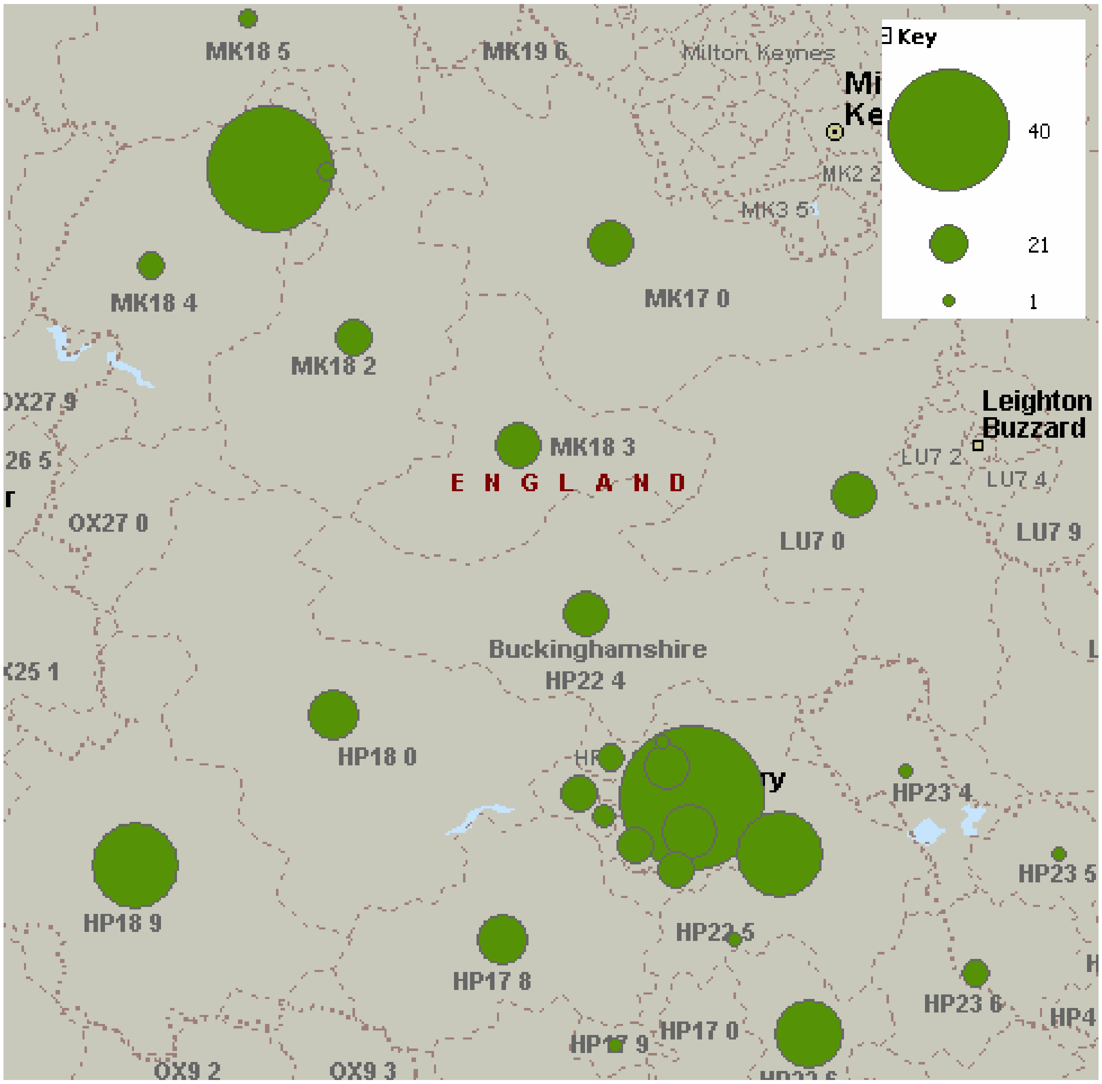
	Total	Advertising	Architecture	Arts & antique trade	Design	Video, Film And Photography	Music And Visual And Performing Arts	Publishing	Interactive Leisure Software	Television & radio	Film & Video/ Television and radio
Aylesbury Vale	480	30	35	19	75	46	187	48	5	35	*
Chiltern	356	18	32	23	52	34	120	53	3	21	*
South Bucks	297	21	20	8	40	67	86	30	7	17	1
Wycombe	517	37	42	13	64	69	184	61	5	42	*

[8] Note that Ancer Spa have included Music with the Visual and Performing Arts. Current DCMS guidelines are that it should be part of the Audio-Visual rather than the Performance domain.

3.2 Maps[9]

3.2.1 Number of creative enterprises by postal sector[10]

Figure 1: Creative enterprises in Aylesbury Vale



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[9] All maps copyright © and (P) 1988-2006 Microsoft Corporation and/or its suppliers. All rights reserved. Portions © InstallShield/Software Corporation. All rights reserved. Certain mapping and direction data © 2005 NAVTEQ. All rights reserved. NAVTEQ AND NAVTEQ ON BOARD are trademarks of NAVTEQ. © Crown Copyright 2005. All rights reserved. Licence number 100025500.

[10] Note that although only parts of some postal sectors fall within Buckinghamshire, the map symbol has been placed in the centre of each sector.

Figure 2: Creative Enterprises in Chiltern

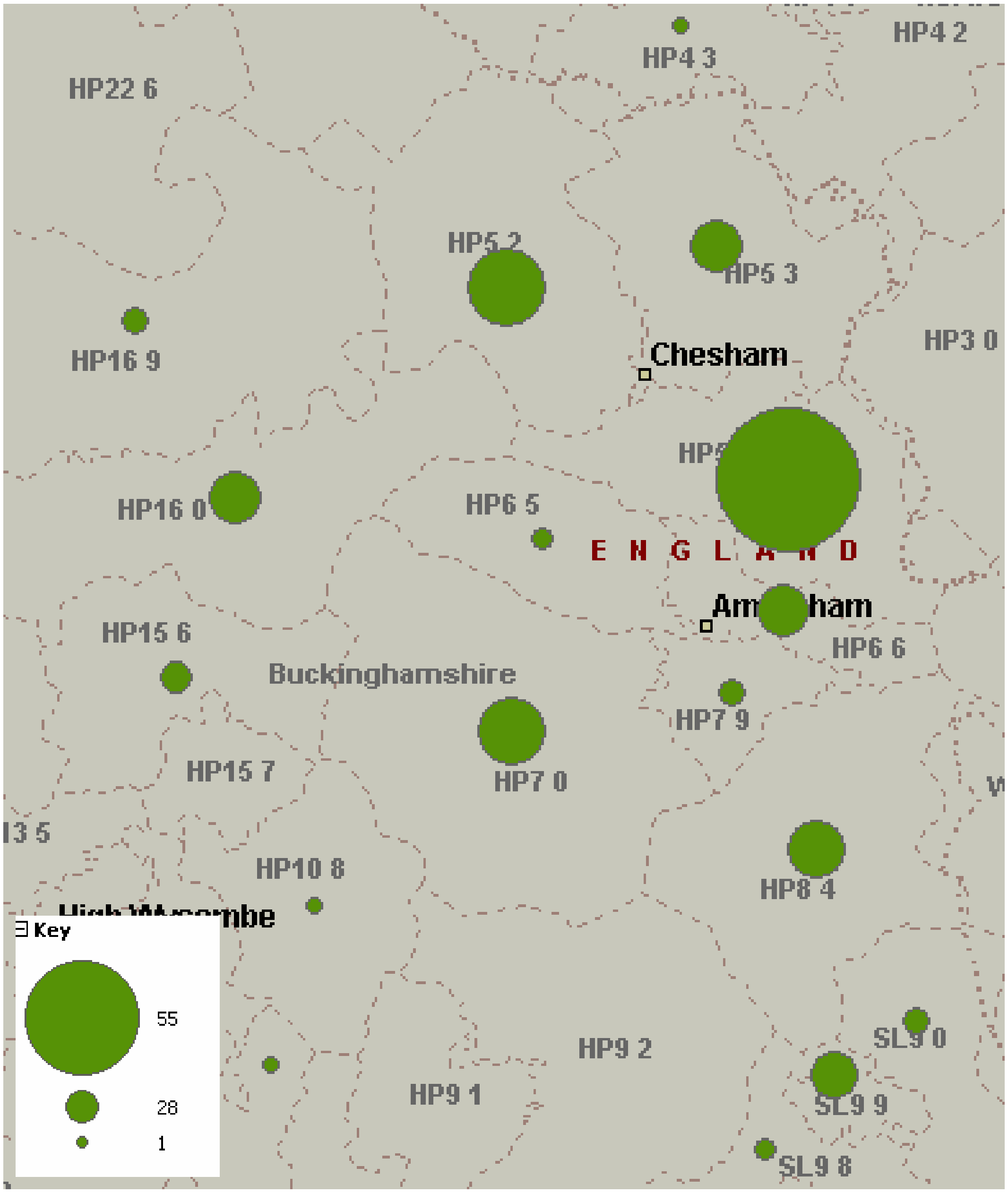


Figure 3: Creative Enterprises in South Bucks

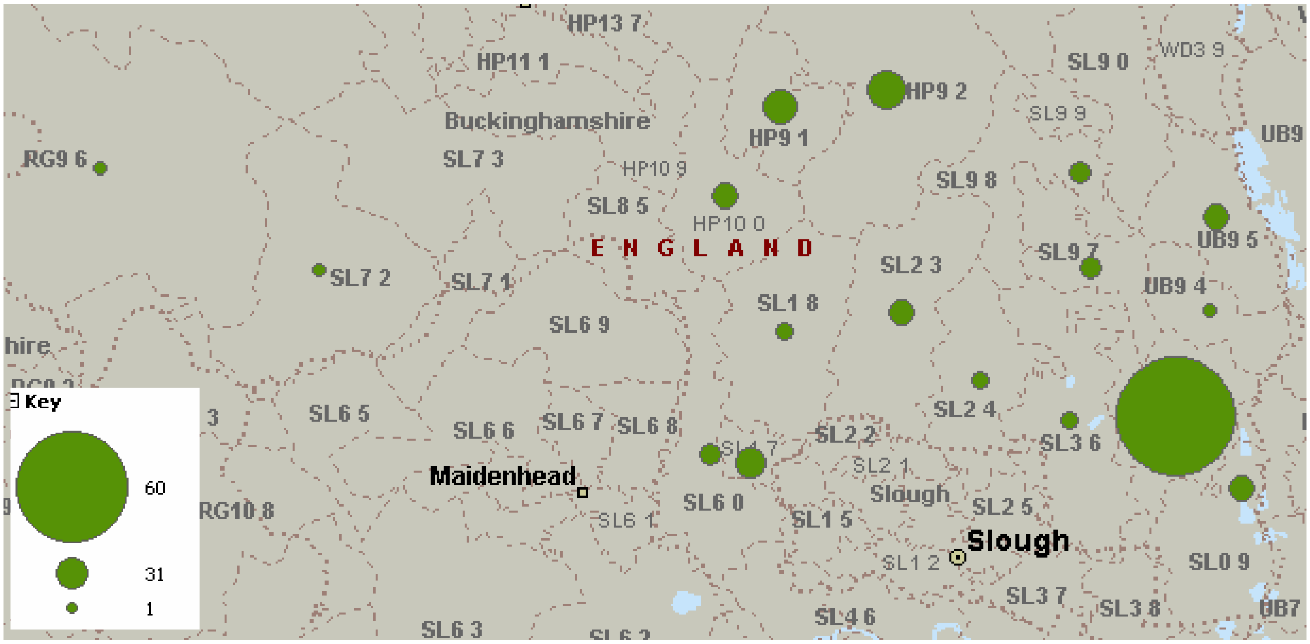
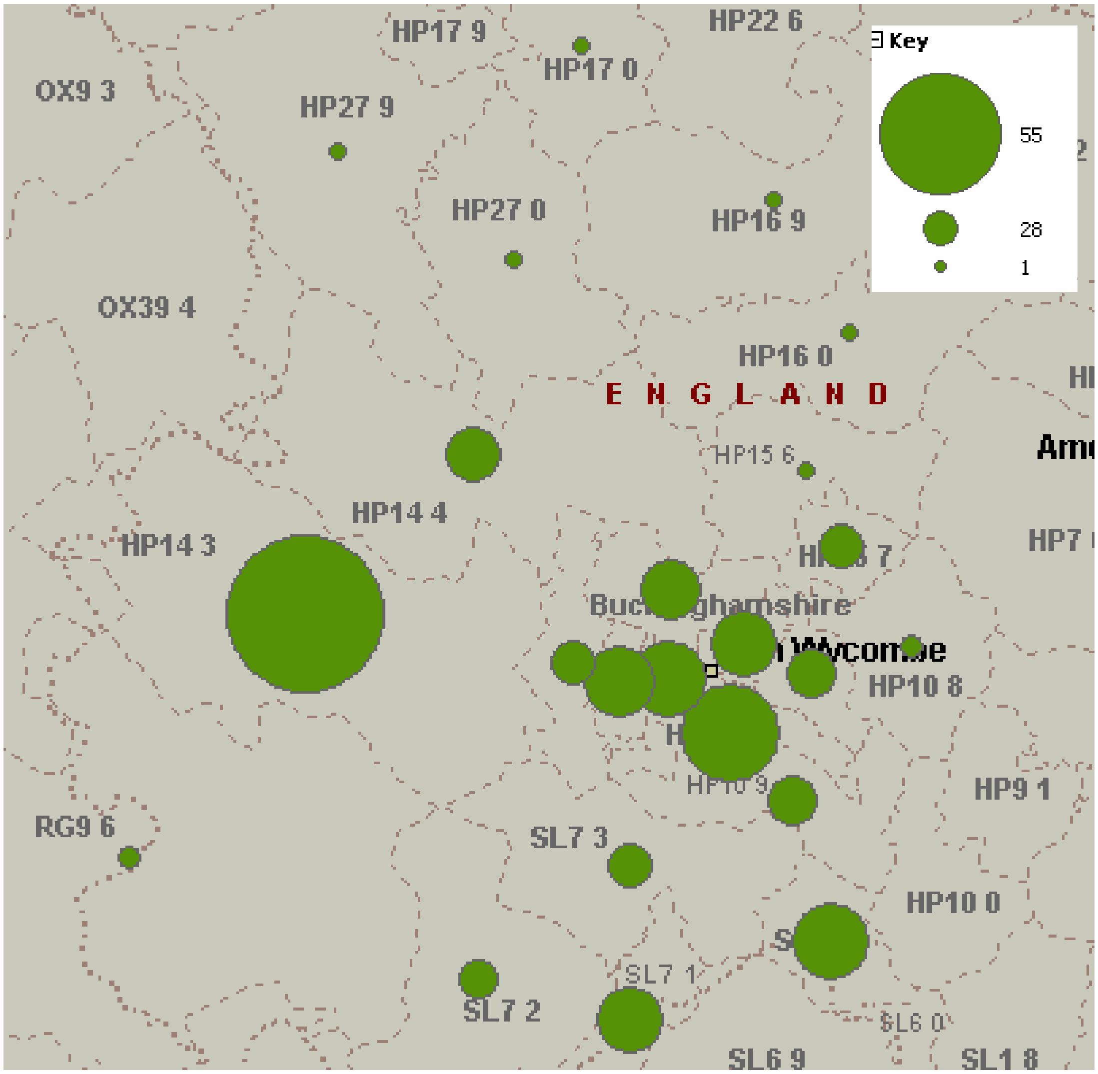


Figure 4: Creative Enterprises in Wycombe



3.2.2 Creative Enterprises by Cultural Domain

Figure 5: Creative Enterprises in Aylesbury Vale by Cultural Domain

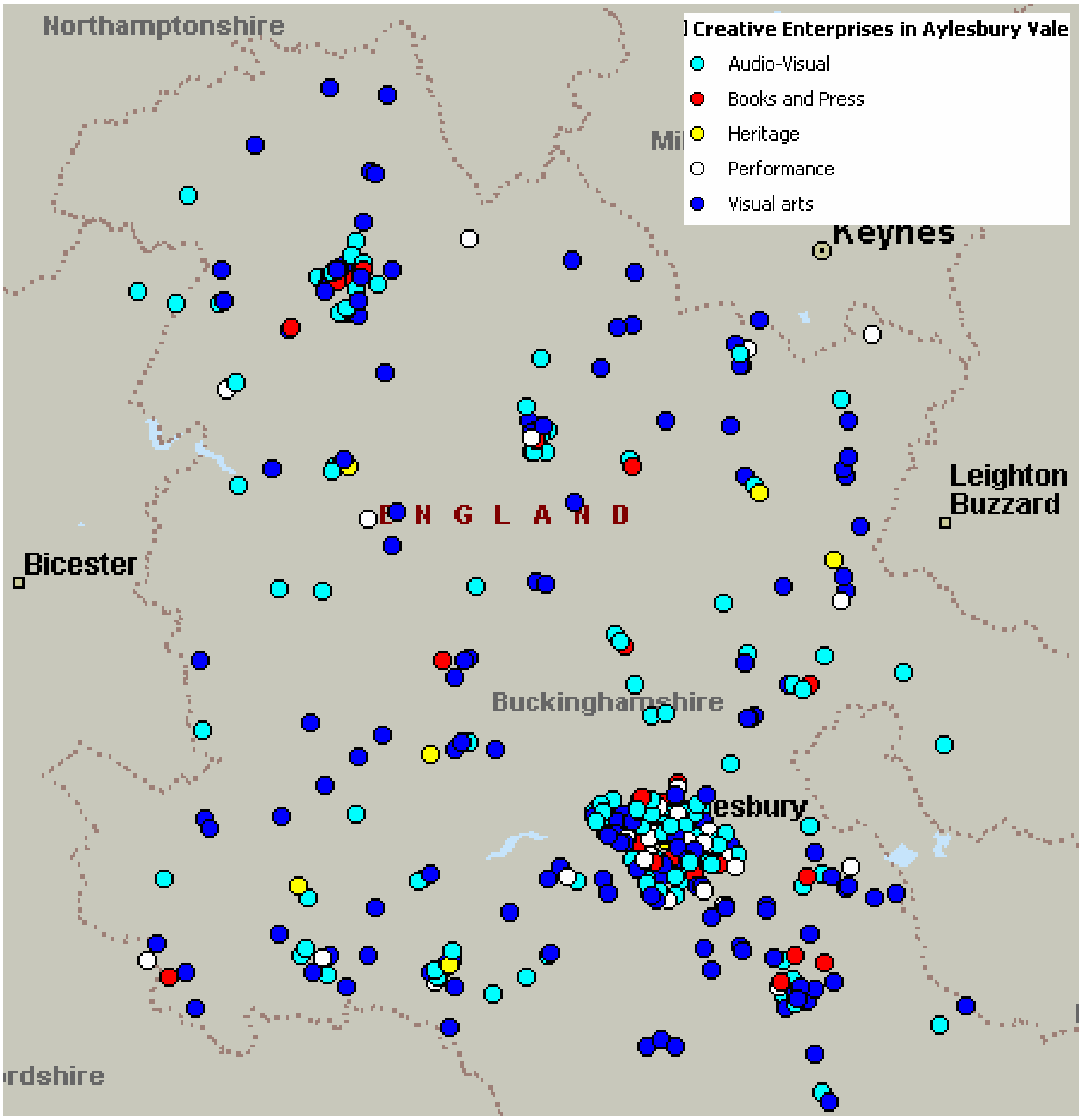


Figure 6: Creative Enterprises in the Buckingham area by Cultural Domain

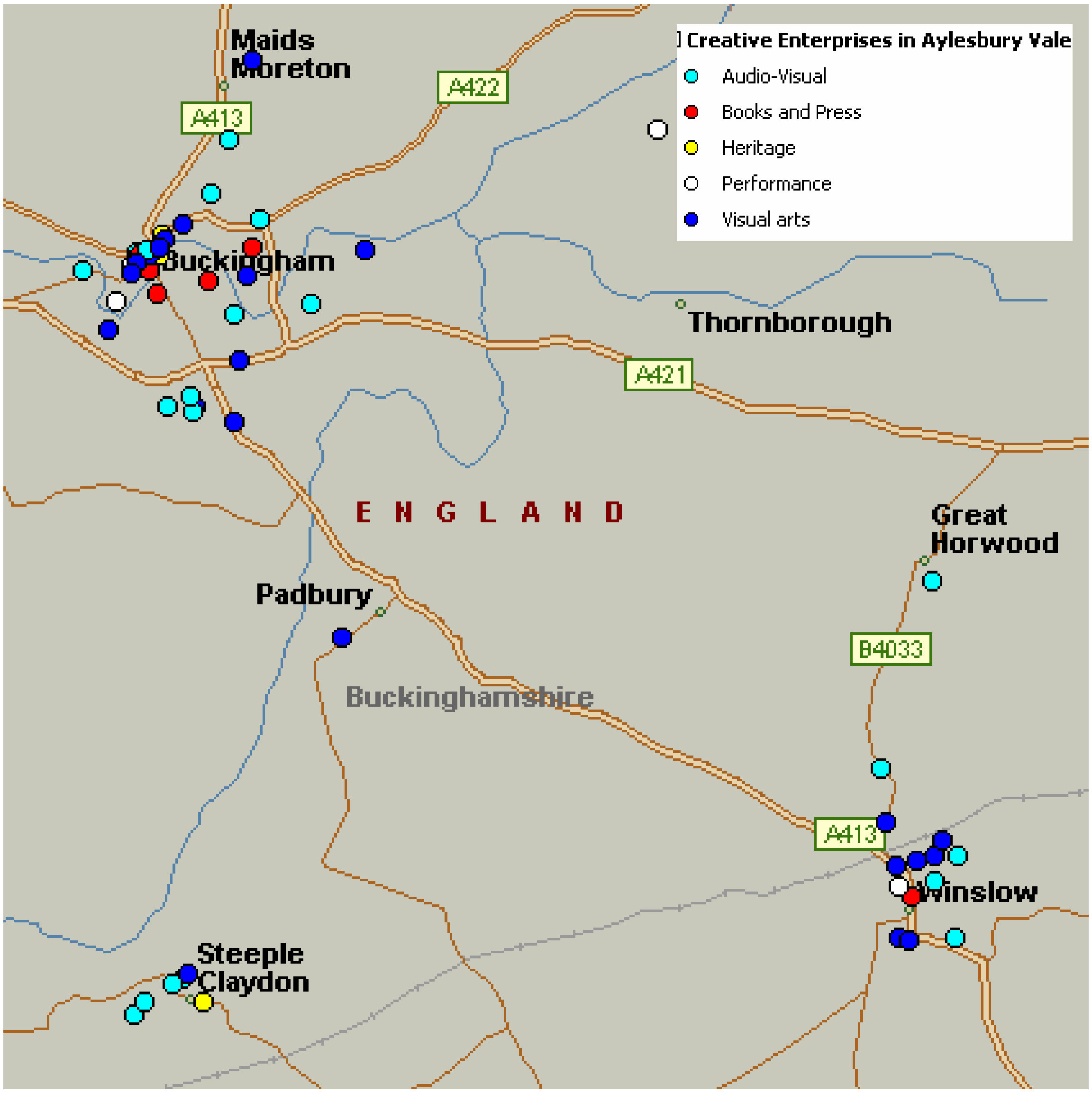


Figure 7: Creative Enterprises in the Aylesbury Area by Cultural Domain

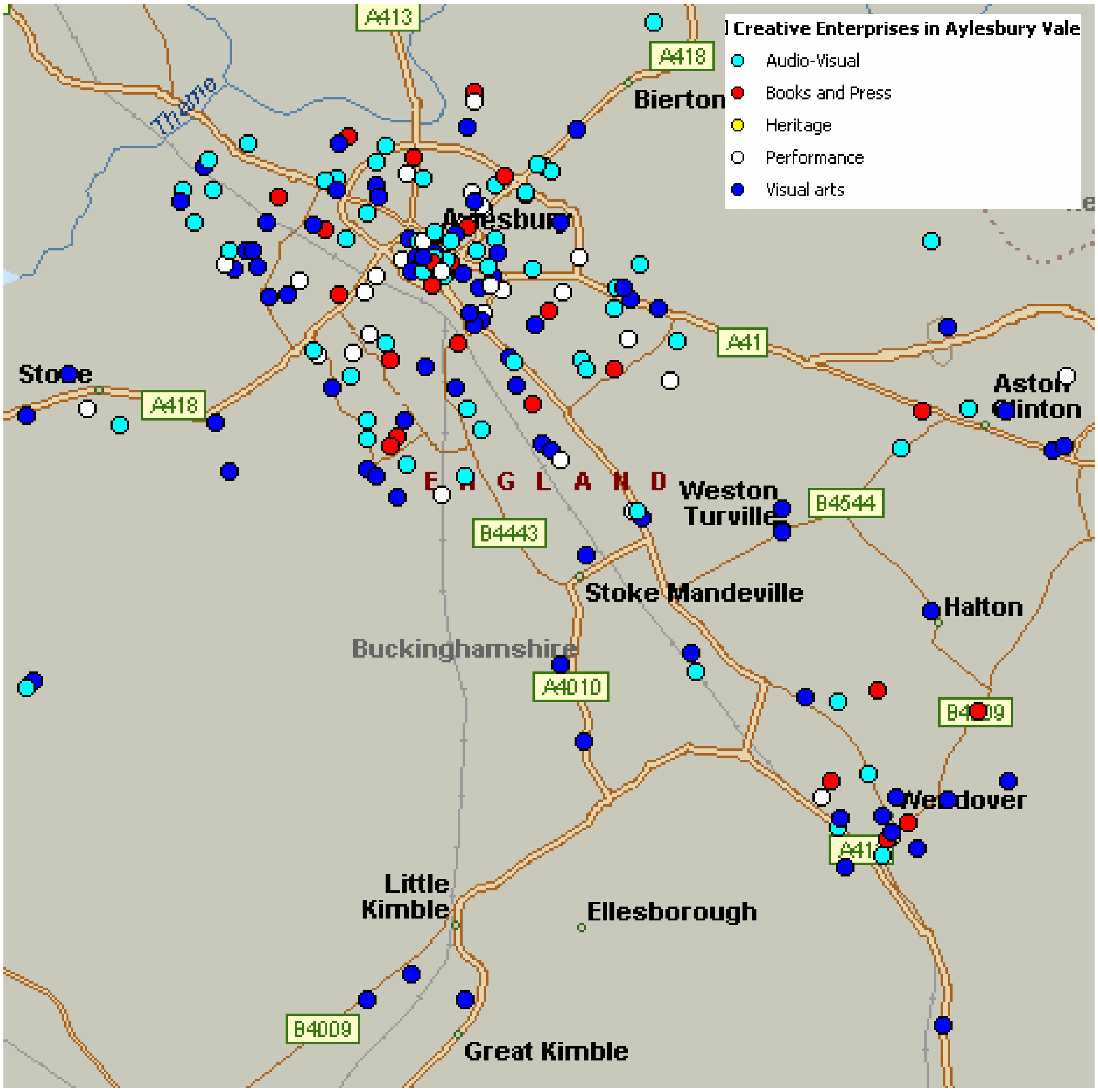


Figure 8: Creative Enterprises in Chiltern by Cultural Domain

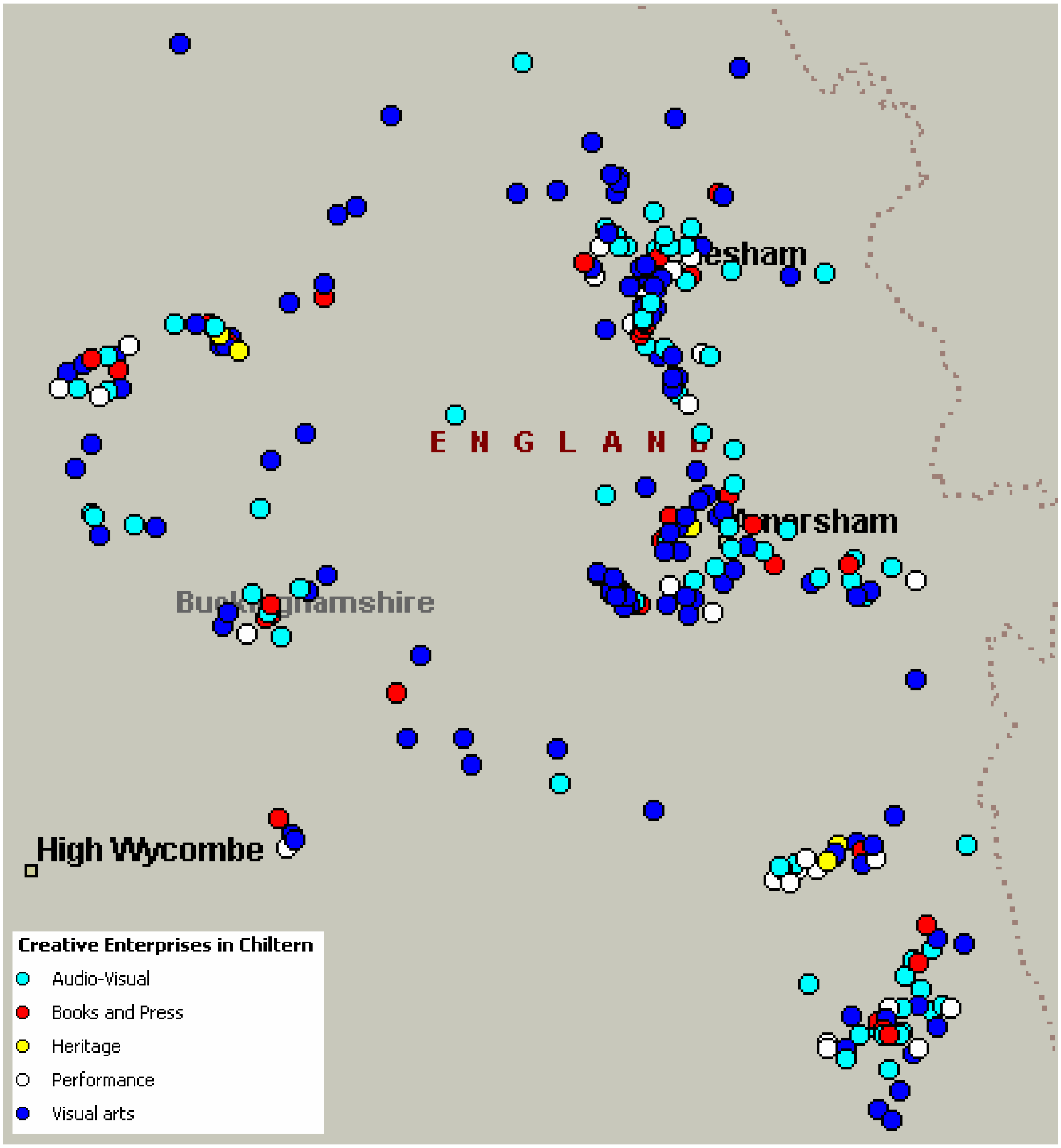


Figure 9: Creative Enterprises in the Chesham and Amersham Area by Cultural Domain

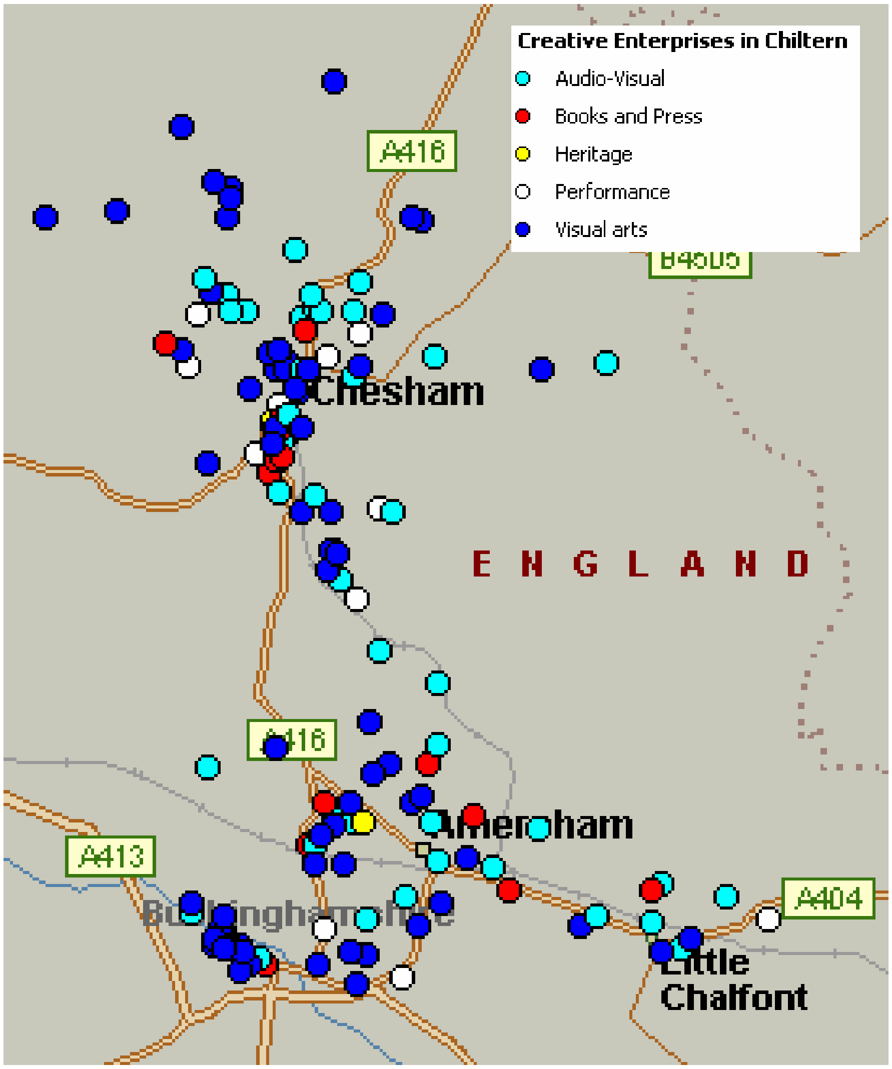


Figure 10: Creative Enterprises in the Chalfont Area by Cultural Domain

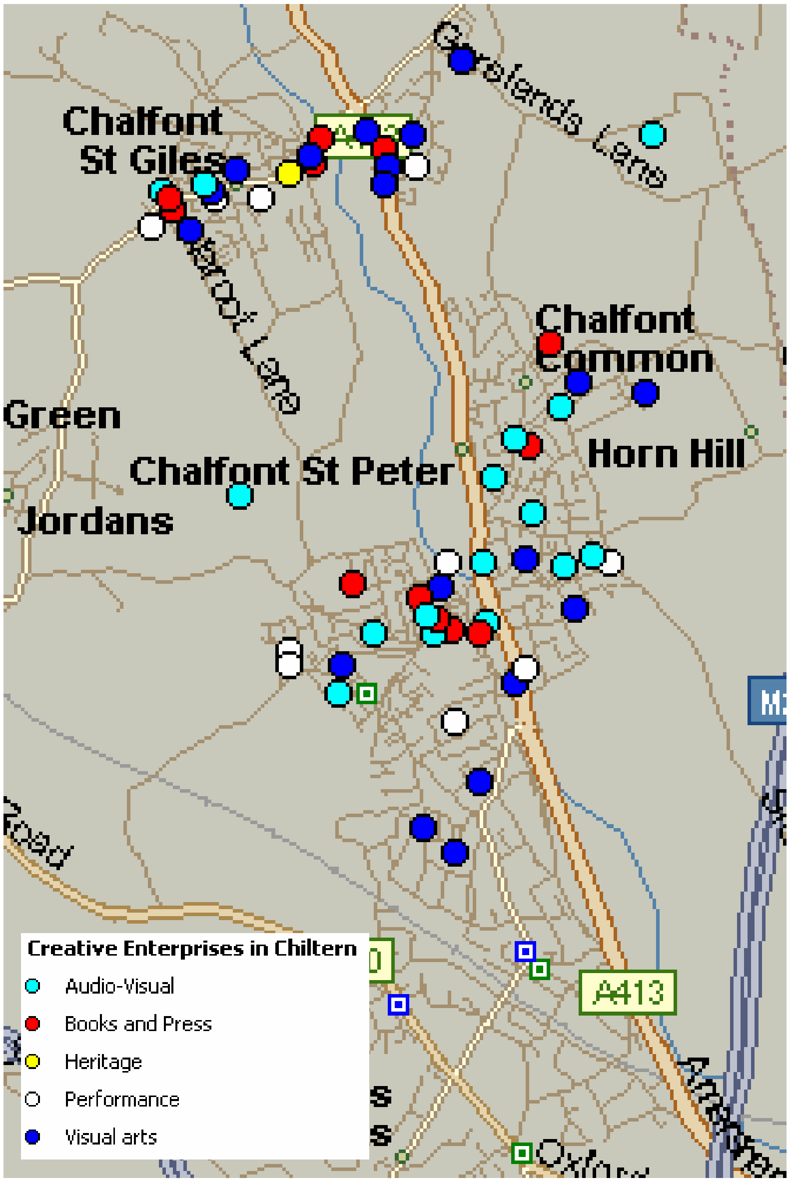


Figure 11: Creative Enterprises in South Bucks by Cultural Domain

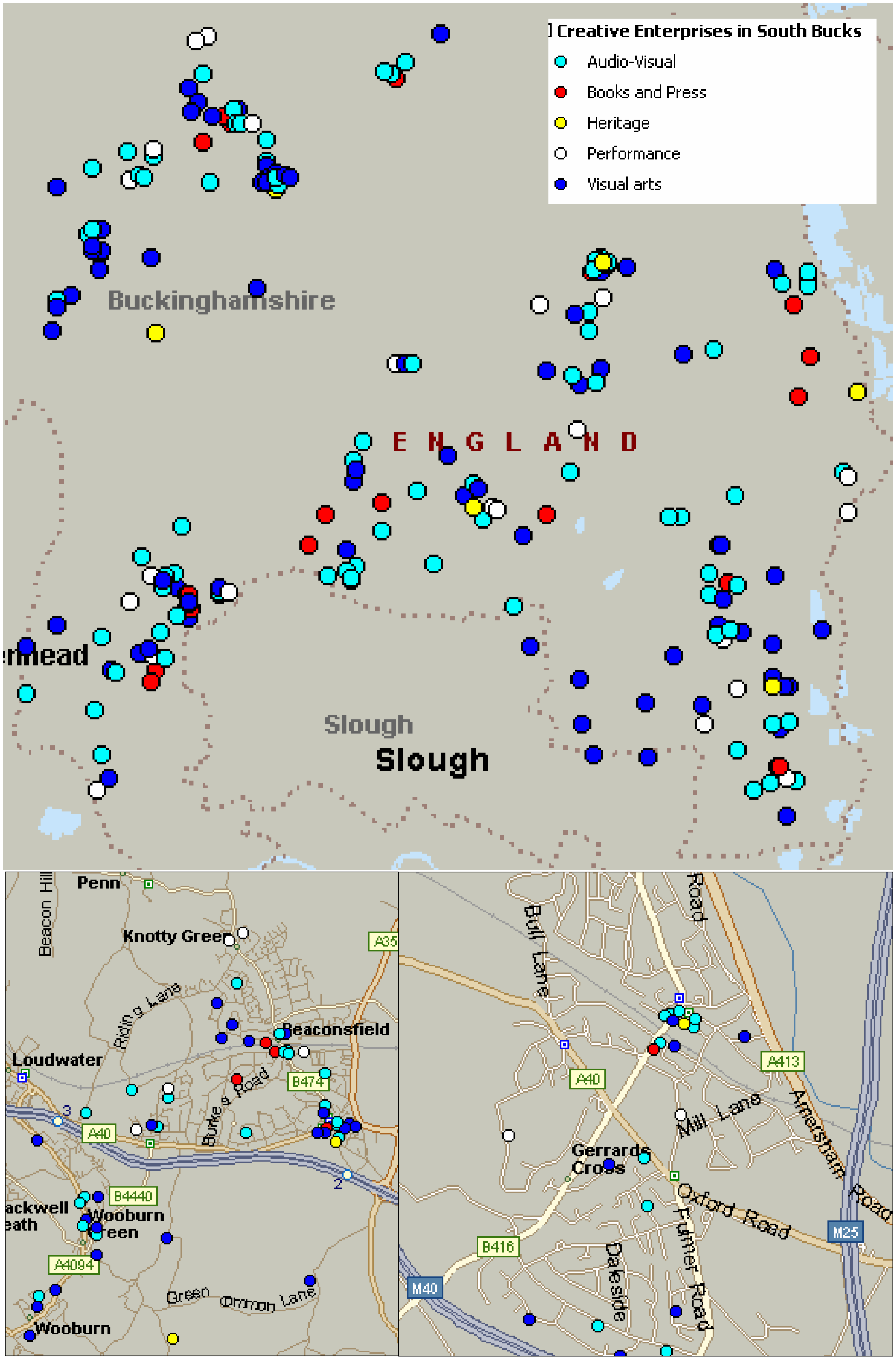


Figure 12: Creative Enterprises in Wycombe by Cultural Domain

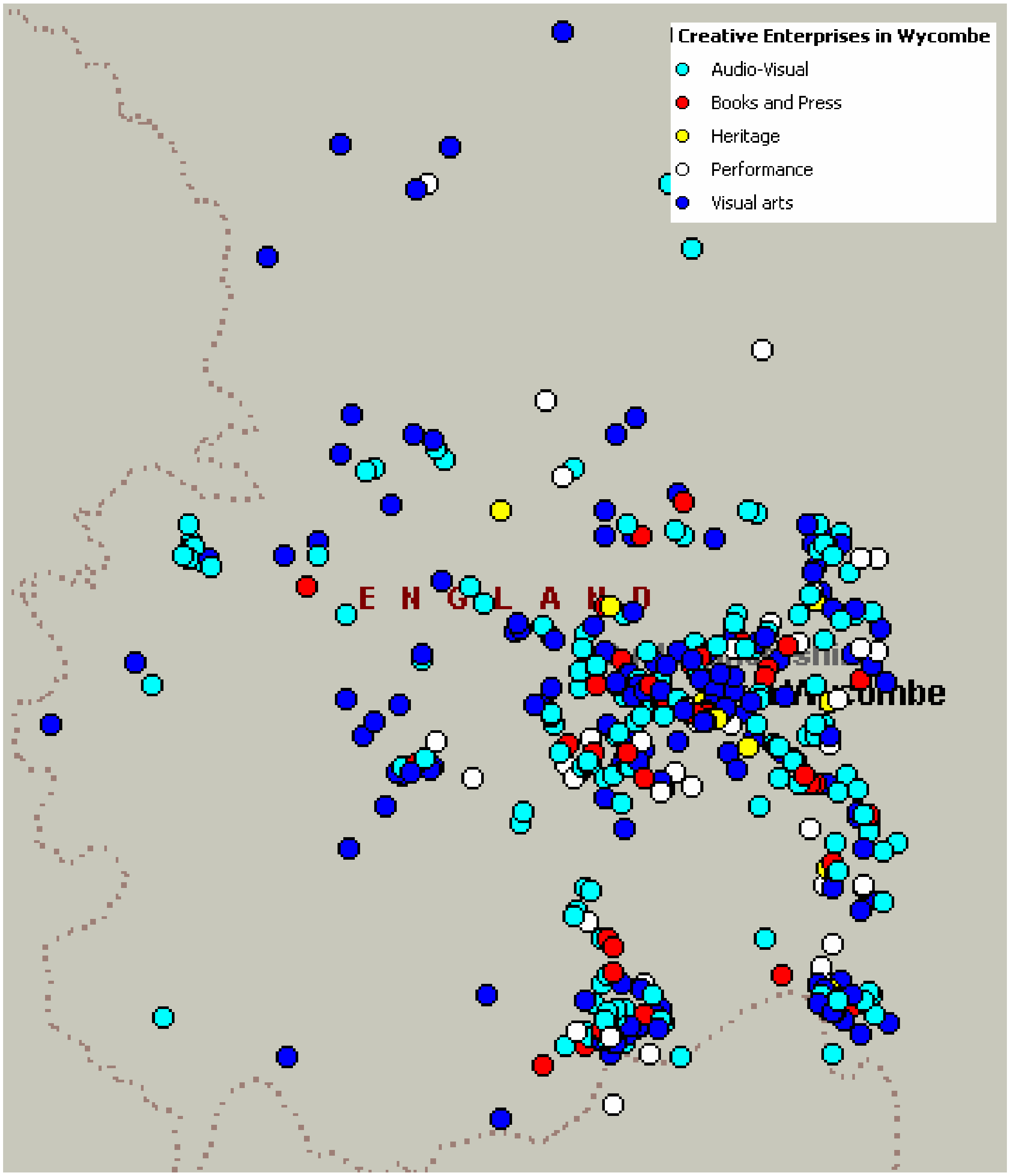
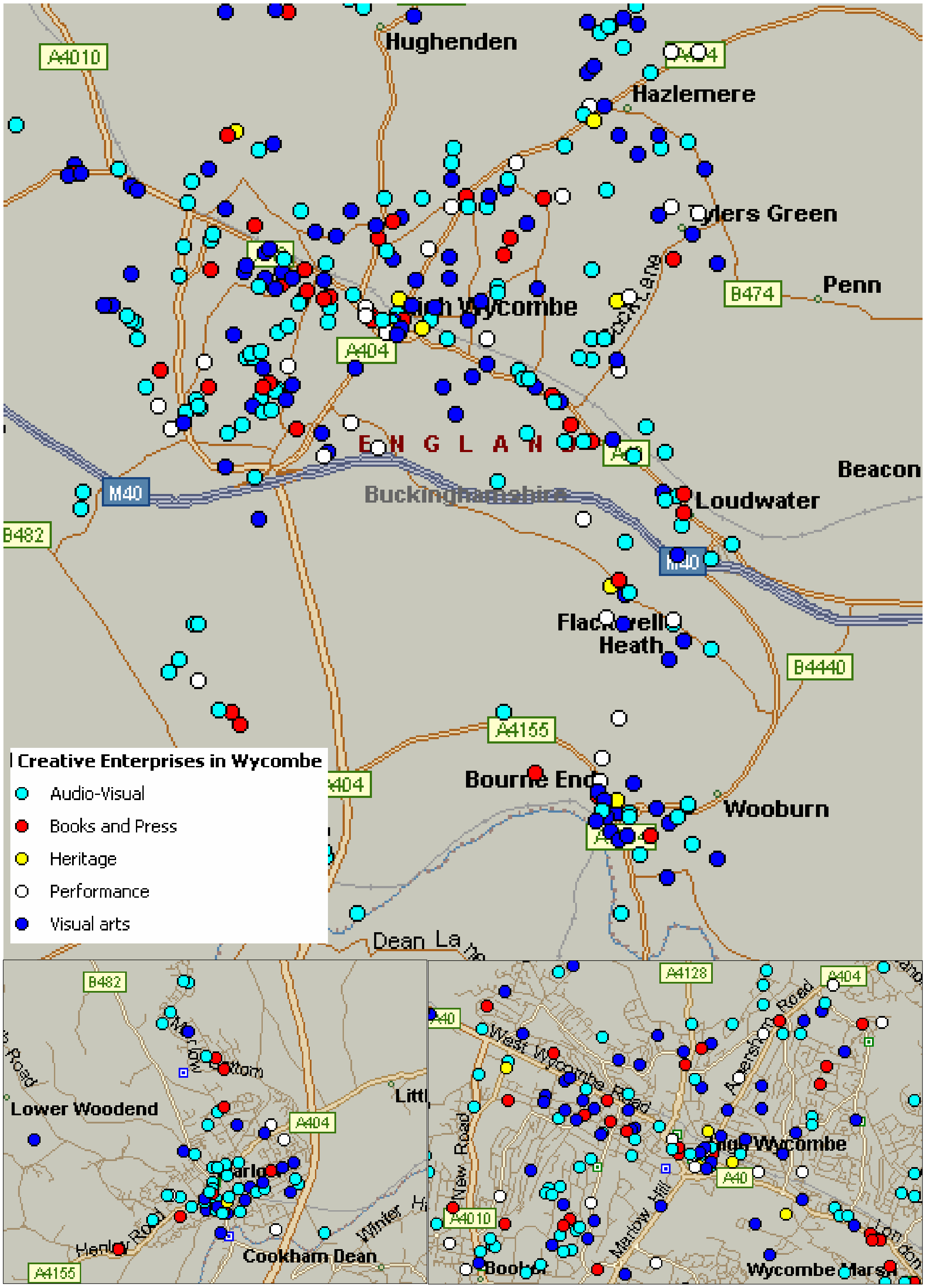


Figure 13: Creative Enterprises in the High Wycombe and Marlow Areas by Cultural Domain



3.3 Key findings

3.3.1 Headline statistics

This audit has located 1,729 creative enterprises in Buckinghamshire, employing an estimated 94,281 people with an estimated total turnover of £3bn.

Table 3: Number of creative enterprises including Heritage

	No. of enterprises	% of enterprises
Aylesbury Vale	519	30%
Chiltern	365	21%
South Bucks	307	18%
Wycombe	532	31%
No location	6	0.3%
Total	1729	

Table 4: Number of creative enterprises excluding Heritage

	No. of enterprises	% of enterprises
Aylesbury Vale	480	29%
Chiltern	354	21%
South Bucks	297	18%
Wycombe	517	31%
No location	6	0%
Total	1652	

Table 5: Estimated number employed by creative enterprises

The Level Two research identified actual numbers of employees whereas the Level One research data gives employee numbers in bands. The following calculation is based on actual numbers where available and the lowest point in the upper band and the median points in the other bands.

	No. of employees	% total employees
Aylesbury Vale	29,770	32%
Chiltern	24,462	26%
South Bucks	8,635	9%
Wycombe	31,415	33%
Total	94,281	

Table 6: Estimated turnover

Participants in the Level Two research were reluctant to give information about turnover, particularly in the relatively narrow bands used in the Level One research. At this stage, the bands were therefore aggregated. The following calculations are based on the lowest point in the upper bands and the median points in the others, using the narrowest bands available.

	Turnover ('000s) £	% total turnover
Aylesbury Vale	871,856	28%
Chiltern	765,771	25%
South Bucks	415,076	13%
Wycombe	1,036,046	34%
Total	3,088,748	

Table 7: Estimated turnover by cultural domain

	Turnover ('000s) £	% total turnover
Audio-Visual	1,999,889	65%
Books and Press	908,536	29%
Heritage	37,548	1%
Performance	23,123	1%
Visual arts	119,653	4%
Total	3,088,748	100%

Table 8: Enterprises by cultural domain

The largest domain by number of enterprises is the Visual Arts overall and in Aylesbury Vale and Chiltern. In South Bucks and Wycombe the largest domain is Audio-Visual.

Local authority	Audio-Visual		Books and Press		Heritage		Perfor-mance		Visual Arts		Total	
Aylesbury Vale	163	26%	49	26%	17	35%	54	30%	214	31%	497	29%
Chiltern	102	16%	52	27%	10	20%	36	20%	164	24%	364	21%
South Bucks	137	22%	30	16%	8	16%	31	17%	99	15%	305	18%
Wycombe	208	33%	61	32%	12	24%	55	30%	193	28%	529	31%
No location	3	0.5%	0	0%	0	0.0%	2	1%	1	0.1%	6	0.4%
Total	627		192		49		181		680		1701	

Figure 14: Number of Enterprises in Each Local Authority Area by Domain

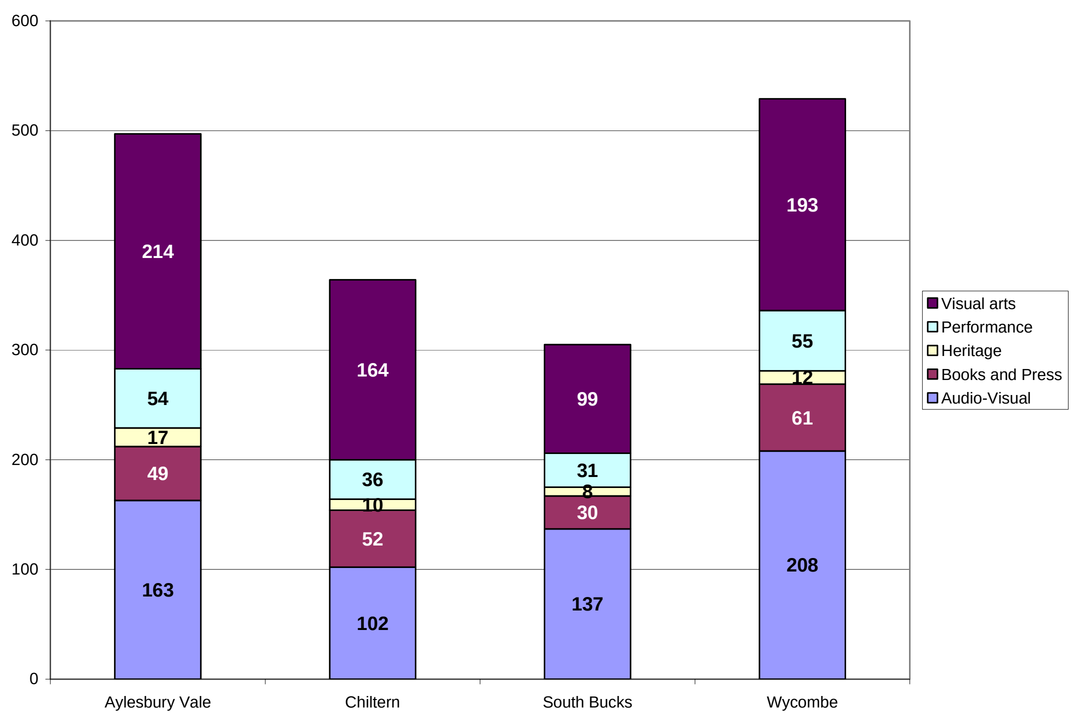
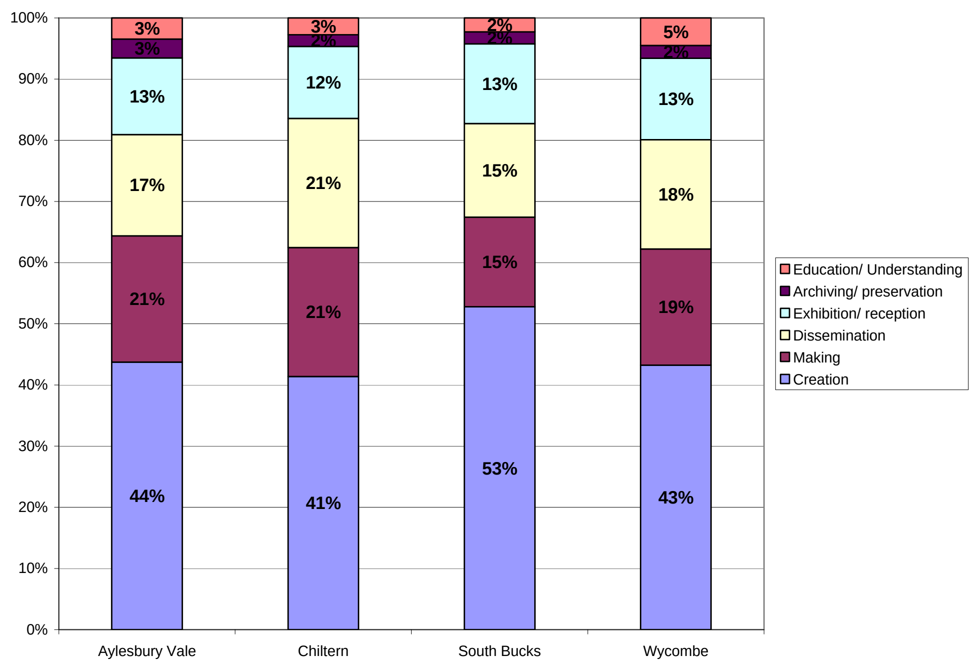


Table 9: Number of enterprises at each stage of the cultural cycle

The largest number of enterprises are involved at the Creation stage of the cultural cycle overall and in each local authority area.

	Creation	Making	Dissem-ination	Exhib-ition/ reception	Archiving /preser-vation	Education/ Under-standing	Total
Aylesbury Vale	227	107	86	65	16	18	519
Chiltern	151	77	77	43	7	10	365
South Bucks	162	45	47	40	6	7	307
Wycombe	230	101	95	71	11	24	532
No location	1	3		2			6
Total	771	333	305	221	40	59	1729

Figure 15: % of enterprises at each stage of the cultural cycle by local authority



3.3.2 Category of activity

Table 10: Audio-Visual – Main Categories of Activity

The largest number of enterprises fall into the music category, including 39 mobile discos and 20 music teachers or music education organisations. The majority of the remainder are fairly evenly spread between Advertising, Film and Video, Photography and Television and Radio.

	No. of enterprises	% of enterprises
Advertising	106	17%
Film & Video	103	17%
Film & Video / Television and radio	1	0%
Interactive Leisure Software	16	3%
Music	155	25%
Photography	113	18%
Television & radio	115	19%
Other	4	1%
Total	613	

Table 11: Performance - Main Categories of Activity

The largest cluster of enterprises largely consists of dance schools. The sizeable Entertainment category includes children's entertainers, entertainment agencies, night clubs and companies supplying entertainment for corporate or social events. The 30 enterprises engaged with multiple artforms include arts education, festivals, community arts organisations and artists collectives.

	No. of enterprises	% of enterprises
Comedy	1	1%
Dance	62	35%
Drama	8	4%
Entertainment	47	26%
Magic	5	3%
Management	12	7%
Multiple artforms	30	17%
Opera	1	1%
Technical	4	2%
Venue	8	4%
Total	178	

Table 12: Visual Arts - Main Categories of Activity

By far, the largest category of enterprises in this domain are engaged with Design including web design, graphic design, interior design and garden design. Other sizeable categories are Architecture and Craft Makers (breakdown below).

	No. of enterprises	% of enterprises
Architecture	129	19%
Arts & antique market	63	9%
Craft equipment/materials	7	1%
Craft makers	110	16%
Design	231	34%
Gallery	26	4%
Management	2	0%
Multiple artforms	6	1%
Other creative activities	18	3%
Picture framing	20	3%
Prints	2	0%
Visual artists	65	10%
Total	679	

Table 13: Breakdown of Craft Activities

By far the largest groups within this category are furniture designers and makers and upholsterers.

	No. of enterprises	% of enterprises
Calligraphy	3	3%
Ceramics	5	5%
Furniture	36	33%
Glass	9	8%
Illustration	5	5%
Jewellery	7	6%
Crafts equipment/materials	7	6%
Other crafts	7	6%
Upholstery	31	28%
Total	110	

Table 14: Breakdown of Visual Art Forms

	No. of enterprises	% of enterprises
Painter	29	45%
Printmaking	3	5%
Sculpture	10	15%
Textiles	5	8%
not known[11]	18	28%
Total	65	

[11] The art form is not know either because the artist was reluctant to give the information (for example to avoid bing 'pigeon-holed') or because they were not contactable by telephone and the art form was not evident from their website.

3.3.3 Turnover

Table 15: Number of Enterprises in Each Turnover Category

The largest number of enterprises falls into the £50,000 - £250,000 turnover band. 45% of enterprises have turnovers under £50,000.

	Aylesbury Vale	Chiltern	South Bucks	Wycombe	No location	Total
Under £5,000	22	14	15	17	1	69
£5,001 - £25,000	68	43	56	88		255
£25,001 - £50,000	119	82	61	127		389
£50,001 - £250,000	157	141	107	151		556
£250,001 - £500,000	36	19	13	34		102
£500,001 - £1,000,000	15	22	14	21		72
£1,000,001 - £10,000,000	6	10	12	23		51
£10,000,001 - £50,000,000	1	3	5	7		16
£50,000,001 - £100,000,000	1					1
£100,000,000 and above	7	6	2	7	1	23
Total with information	432	340	285	475	2	1534
No information	33	31	24	41	1	130

Figure 16: Enterprises in each turnover band by Domain

	Audio-Visual		Books and Press		Heritage		Performance		Visual arts		Total	
under £5,000	27	5%	3	2%		0%	1	1%	38	6%	69	4%
£5,001 - £25,000	115	20%	5	3%	7	35%	43	32%	85	14%	255	17%
£25,001 - £50,000	138	24%	15	8%	2	10%	42	31%	192	31%	389	25%
£50,001 - £250,000	184	32%	102	55%	6	30%	39	29%	225	37%	556	36%
£250,001 - £500,000	38	7%	27	15%		0%	1	1%	36	6%	102	7%
£500,001 - £1,000,000	24	4%	12	6%	2	10%	8	6%	26	4%	72	5%
£1,000,001 - £10,000,000	29	5%	11	6%	2	10%	2	1%	7	1%	51	3%
£10,000,001 - £50,000,000	12	2%	2	1%	1	5%		0%	1	0%	16	1%
£ 50,000,001 - £100,000,0000		0%	1	1%		0%		0%		0%	1	0%
£100,000,000 +	16	3%	7	4%		0%		0%		0%	23	1%
Total	583	100%	185	100%	20	100%	136	100%	610	100%	1534	100%
Not known	30		7		27		42		61		167	

Figure 17: Number of Creative Enterprises in Each Local Authority Area by Turnover Band

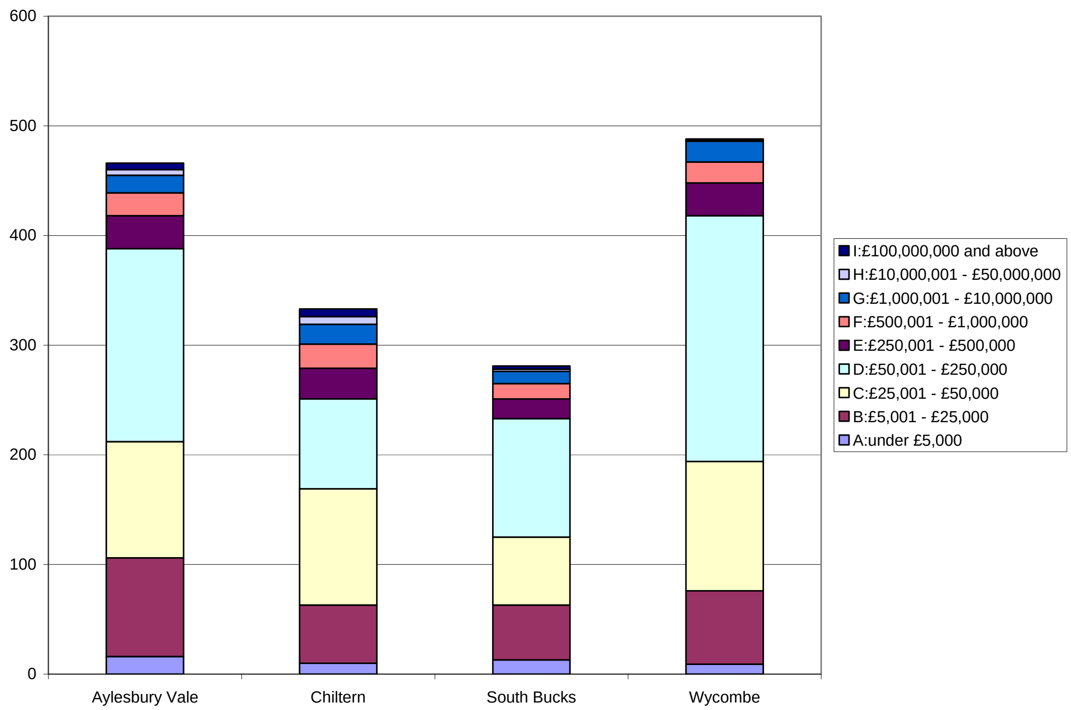


Figure 18: Distribution of Enterprises with Turnovers Exceeding £250,000

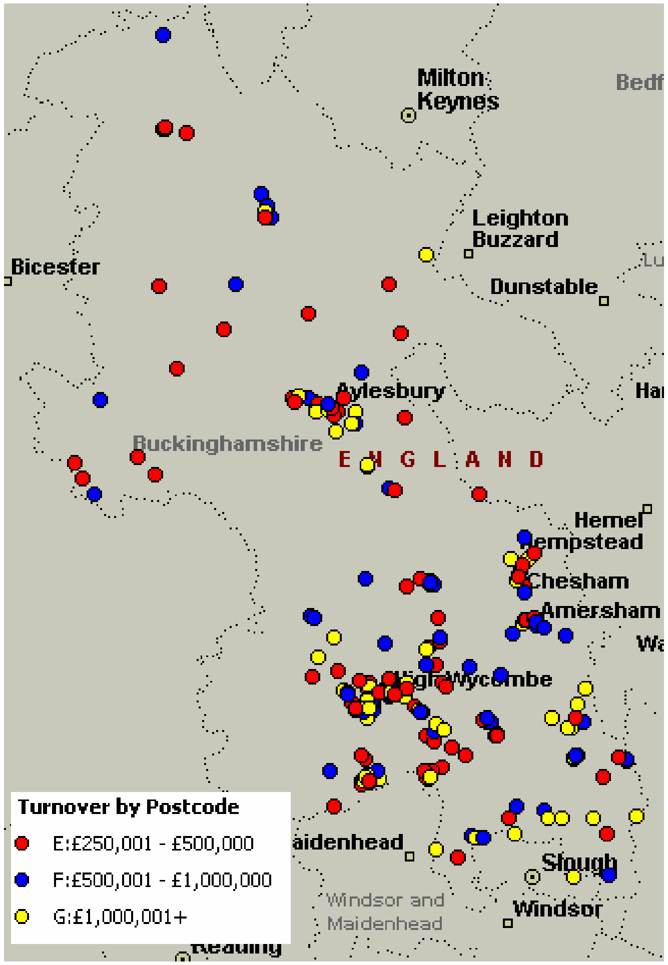
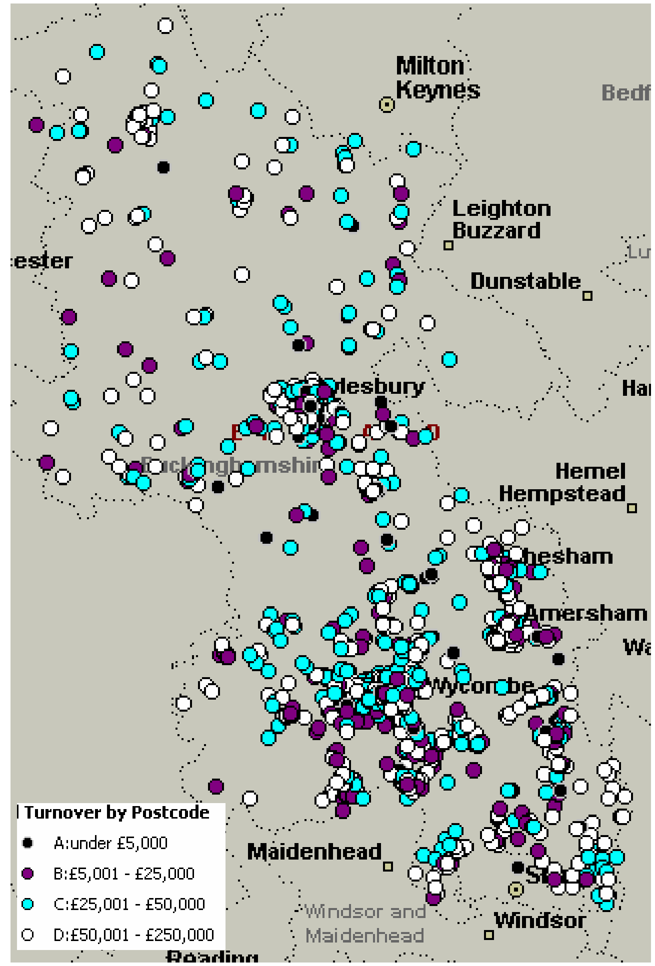


Figure 19: Distribution of Enterprises with Turnovers of Under £250,000



3.3.4 Employees

Table 16: Creative enterprises in each employee band

More than half of the enterprises employ one or two people, except in South Bucks which has a smaller overall number of enterprises but a greater proportion employing three to five, six to 15 and 16 to 25 people.

	Aylesbury Vale		Chiltern		South Bucks		Wycombe		No location	Total
A : 1 – 2	267	58%	191	55%	132	45%	279	55%		869
B : 3 – 5	107	23%	87	25%	81	27%	103	20%		378
C : 6 – 15	54	12%	44	13%	52	18%	71	14%		221
D : 16 – 25	12	3%	6	2%	12	4%	14	3%		44
E : 26 - 50	8	2%	7	2%	7	2%	15	3%		37
F : 51 - 100	3	1%	6	2%	7	2%	9	2%		25
G : 101 - 250	2	0.4%	3	1%	3	1%	8	2%		16
H : 251 - 500										0
I : 501 - 1000	3	1%					2	0%		5
J : 1001 - 5000	5	1%	4	1%	2	1%	5	1%	1	17
K : 5000+	2	0.4%	1	0%			2	0%		5
Total	463		349		296		508		1	1617
Employee data not available	34		15		9		21		5	84

Figure 20: Creative Enterprises in each Local Authority Area by Number of Employees

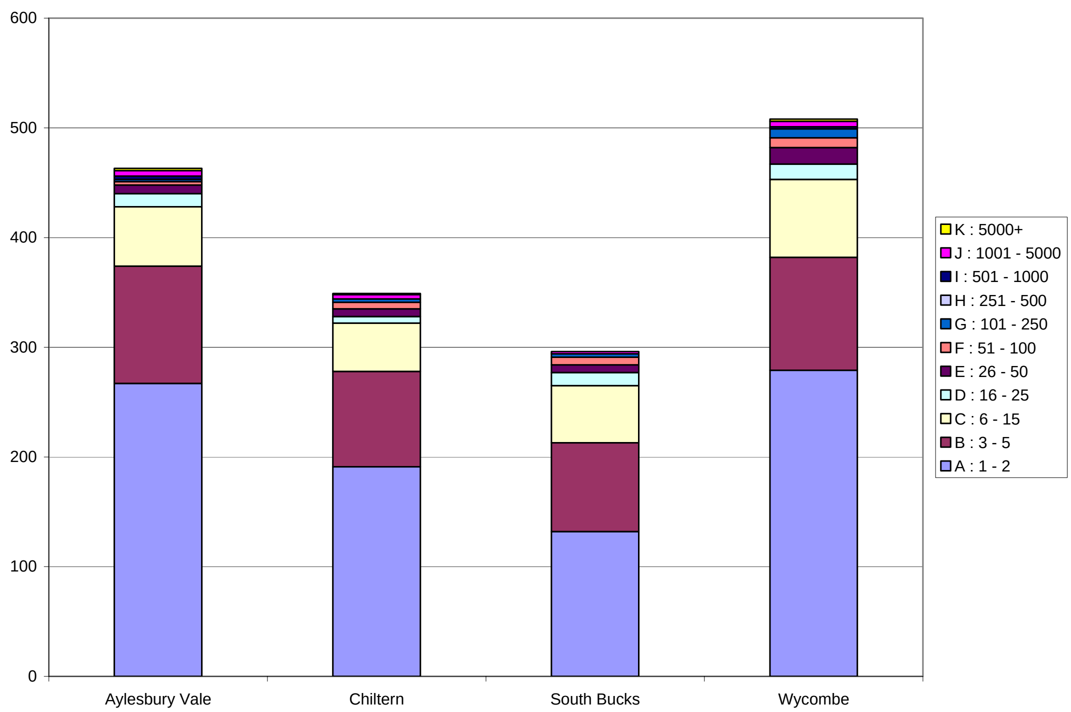


Table 17: Mean number of employees per enterprise

South Bucks has significantly fewer employees per enterprise than the other local authority areas. This is because it has two enterprises employing more than 500 people and none in the highest category (5,000+), while the other areas have between five and ten including at least one in the highest category.

	No. of employees	No of enterprises	Mean no. of employees per enterprise
Aylesbury Vale	29,770	519	57
Chiltern	24,462	365	67
South Bucks	8,635	307	28
Wycombe	31,415	532	59
	94,281	1723	55

Table 18: Percentage of businesses in each domain by employee band

The enterprises employing over 500 people are operating in the Audio-Visual and Books and Press domains. All four organisations in the Performance domain with 101 to 250 employees are education organisations.

	Audio-Visual	Books and Press	Heritage	Performance	Visual arts	Total
A : 1 - 2	49%	39%	23%	53%	58%	51%
B : 3 - 5	22%	28%	32%	19%	21%	22%
C : 6 - 15	13%	20%	28%	4%	12%	13%
D : 16 - 25	3%	2%		4%	2%	3%
E : 26 - 50	4%	1%	13%	2%	0.4%	2%
F : 51 - 100	2%	1%	2%	2%	1%	1%
G : 101 - 250	1%	2%		2%		1%
I : 501 - 1000	1%	1%				0.3%
J : 1001 - 5000	2%	3%				1%
K : 5000+	1%					0.3%
Total	613	192	47	178	671	1701

Just under three quarters of creative enterprises employ fewer than six people. This ranges between 55% for Heritage enterprises and 78% for Visual Arts enterprises:

	Percentage of enterprises with 1 – 5 employees
Audio-Visual	71%
Books and Press	67%
Heritage	55%
Performance	72%
Visual arts	78%
Total	73%

Table 19: Percentage of enterprises in each employment band by main area of activity: Audio-Visual

	Advertising	Film & Video	Interactive Leisure Software	Music	Other	Photography	Television & radio	Total
A : 1 - 2	44%	31%	38%	66%	25%	64%	43%	50%
B : 3 - 5	27%	23%	25%	16%		23%	26%	22%
C : 6 - 15	20%	20%	25%	11%	25%	6%	9%	13%
D : 16 - 25	4%	5%	6%	1%	25%	2%	3%	3%
E : 26 - 50	3%	2%		3%	25%		10%	4%
F : 51 - 100	1%	3%		2%		2%	5%	2%
G : 101 - 250	1%	4%					3%	1%
I : 501 - 1000				1%		3%		1%
J : 1001 - 5000		8%	6%	1%			1%	2%
K : 5000+		5%						1%
Total with information	106	101	16	148	4	111	115	601

Table 20: Percentage of enterprises in each employment band by main area of activity: Performance

	Com-edy	Dance	Drama	Enter-tainment	Magic	Manage-ment	Multiple artforms	Opera	Tech-nical	Venue	Total
A : 1 - 2	100%	55%	88%	66%	100%	25%	27%	100%	50%	25%	53%
B : 3 - 5		15%		19%		42%	23%		25%	38%	19%
C : 6 - 15				4%		8%	7%		25%	13%	4%
D : 16 - 25		2%		6%		8%	7%			13%	4%
E : 26 - 50				4%			3%			13%	2%
F : 51 - 100						8%	7%				2%
G : 101 - 250							13%				2%
Total with information	1	62	8	47	5	12	30	1	4	8	178
Not available	100%	55%	88%	66%	100%	25%	27%	100%	50%	25%	53%

Table 21: Percentage of enterprises in each employment band by main area of activity: Visual Arts

	Architec-ture	Arts & antique market	Craft	Design	Gallery	Multiple artforms	Other creative activities	Prints	Visual artists	Total
A : 1 - 2	61%	67%	60%	53%	68%	100%	67%	100%	87%	61%
B : 3 - 5	27%	17%	21%	24%	27%		22%		6%	22%
C : 6 - 15	9%	10%	13%	20%	5%		11%		4%	13%
D : 16 - 25	2%	5%	3%	2%					2%	2%
E : 26 - 50			2%	0%						0%
F : 51 - 100		2%	2%	0%						1%
Total	129	63	112	231	22	2	18	1	47	625

3.3.5 Number of years trading

98 respondents to the Level Two research were willing to give the number of years their business have been trading

Table 22: Creative enterprises by number of years trading

	No. of enterprises
One	6
Two	6
3 to 5	12
6 to 10	23
11 to 15	9
16 to 20	9
21 or more	33
Total	98

3.3.6 Engagement in the provision of workshops and training

Six enterprises not currently offering workshops or training opportunities are intending to do so in the future.

Table 23: Number of enterprises currently providing workshops or training opportunities

	No. of enterprises
No	31
Yes	51
Total	82

Table 24: Number of enterprises intending to provide workshops or training opportunities in the future

	No. of enterprises
No	25
Yes	57
Total	82

4 Level Three Research

4.1 Scope of the research

One of the aims of BAP for this research is to identify ways of further supporting the creative industries in Buckinghamshire. To make informed decisions about this, a qualitative and quantitative survey of needs was undertaken to enhance BAP's understanding of a range of its potential customers.

102 creative enterprises from both Level One and Level Two were contacted

43 interviews were completed

10 refused to participate

2 were too busy to respond

48 no reply

Reasons for refusal to participate	
Not relevant to people working commercially	3
BAP not able to offer anything useful	5
Not appropriate	1
Reason not given	1

4.2 Key findings

1. Do you expect your [business to grow/work to develop] over the next 12 months?

Don't Know	15
No	7
Yes	21
Total	43

2. What has been the most important factor that has helped your [business to grow/work to develop] in the past?

Quality of work	1
Access to finance	4
Group initiatives	3
Self	3
Exhibiting locally	8
Developing contact base	11
Other	5
New outlets	1
Workspace	1
No response	1
Networking	3
Telesales	1
Partnerships	1
Total	43

3. What do you see as the barriers to [growing your business/developing your work]?

- Average no of barriers 1.6
- One barrier 24
- Two barriers 15
- Three barriers 3
- No response 1

Barriers cited	
Access to finance	11
Bureaucracy	6
Cashflow	1
Competition	1
Don't want to grow	1
Finding suitable workplace	4
Lack of skills	3
Market conditions	4
Market shrinking	4
No barriers	1
No response	1
Public perceptions of the art form	2
Reaching customers	11
Time constraints	9
Other	7

Other

- Establishing the business overseas
- Having a network of supportive artists to boost confidence.
- Lack of professional umbrella organisations to support artists - feels those in the area have too many amateur members.
- Lack of suitable galleries in the region
- Lack of support from the council
- Lack of website
- Not as young and ambitious as she once was.

You said that lack of skills was hampering the [growth of your business/development of your work]. Could you say what kind of skills you or your staff need?

Admin/legal	1
Marketing	1
No response	1

4. Have you had any business advice help or support in the past 5 years?

No Yes	23 20
Total	43

If yes, what kind of support?

Business start up	4
Financial advice	1
Grant	4
Help with business planning	4
Market information	2
Training	1
Business/marketing advice	6

Not in the past 12 months

	Do you expect your business to grow/work develop in the next 12 months		
Have you had any business advice help or support in the past 5 years?	Don't Know	No	Yes
No	12	4	7
Yes	3	3	14

Who provided it?

Accountant	1
Business Link	10
FE or HE education institute	3
Gateway Enterprise	1
Local Council	2
Peer network	4
Employed consultants	1

How satisfied were you overall with the advice, help or support you received?

Very satisfied	9
Satisfied	4
Neither satisfied nor dissatisfied	4
Dissatisfied	2
No response	1
Total	20

Of those who received support, advice or training from Business Link, how many of them were satisfied?

Dissatisfied	1
Neither satisfied nor dissatisfied	3
Satisfied	2
Very satisfied	3
Total	9

Why didn't you get any advice, help or support?

Can't spare the time	1
Did not occur	6
No relevant support	1
None needed	10
Informal network/support	3
Other	1
No response	1
	23

What kind of business advice, help or support do you need that you have been unable to find or unable to take advantage of?

Grant for marketing	1
Help putting marketing principles into practice	1
Practical help with workload of setting up a limited company	1
Promoting work	1
Telesales	1

Is there any training you or your staff need that you cannot get in your area?

Don't know	1
No	17
Yes	23
No response	2
Total	43

What topics?

Admin and legal	3
Finance	4
Fundraising	3
Marketing	15
Building and maintaining websites	5
Assertiveness training	1
Health and Safety	1
Other	1

What changes are needed that would [help your business/support your work]?

Business advice specific to the arts	2
Collaborative marketing	2
Developing contacts	2
Exhibition space locally	1
Fewer charges for small businesses	1
Finding a bigger market	1
Improvement of existing networks	3
Information about funding	1
Marketing	1
New outlets	3
Practical teaching space	2

Public perception	4
Staff	1
Technology skills and understanding	3
Time management	1
Workspace	2
No response	13
Total	43

The following are possible services that Bucks Arts Partnership could provide or facilitate. Please pick the three that you think would [help your business/support your work] the most:

Advocacy	6
Grants for business advice	1
Grants for equipment	11
Grants for marketing	17
Grants for training	6
Information	9
Networking	15
Showcase	18
Surgeries	11
Training	9
Workspaces	11
No response	1

See Appendix 7.2 for the full text of responses to the question 'Is there anything else you would like to see Bucks Arts Partnership doing in the future?'

4.3 Conclusions

4.3.1 These research findings are consistent with those of Ancer Spa for SEEDA

The research undertaken by Ancer Spa to inform the Strategic Framework and Action Plan for Development of the Creative Industries in South East England identified a series of business support needs common to creative businesses, which echoes the qualitative research undertaken as part of this project. *Comments on the specific findings of this audit are italicised below:*

- Access to short courses on business skills, including specialised marketing. *There were significantly more requests for individually tailored surgeries than training. Those respondents who had not received business skills training did not perceive the need for it and those who had were generally satisfied.*
- Specialist technical support and related technological developments. *Particularly technical advice and support for the development and maintenance of websites and related technology such as on-line sales.*
- Specialist business advice, mentoring from practitioners with good contacts and strong market-knowledge.
- Opportunities for regular networking, particularly physical meetings. *Physical meetings were a consistent request as current provision was perceived as not meeting the needs of professional artists and enterprises with ambitions for growth. "Our network is dominated by hobbyists."*

- Ability to recruit part-time and freelance workers to cope with peaks in demand.. *The focus from this sample was more about the bureaucracy associated with employing people for the first time as the added administration burden cancels out the added staff time.*
- Access to affordable workspace.. *This was an issue for visual artists and crafts makers and is endorsed by the HE institutions.*
- Support and advice on protecting IPR and access to finance. *Access to finance was an issue across the sample. IPR was not mentioned as an issue but this is not surprising as the sample had a predominance of makers of one-off art works and objects. The designers and film and television production companies in the sample, for whom this would be an issue, were not interested in participating in the research for the reasons stated above.*

4.3.2 These research findings are consistent with those of NESTA

The research shows that businesses that have not received any business advice within the last five years are almost twice as likely to feel less confident about their business growing, or not have a clear business plan.

This picture is consistent with research undertaken by NESTA in 2006 (cited in *Reaching out of the Creative Silo*, policy briefing March 2007):

'As the arts and creative industries confront these challenges and seek to capitalise on the opportunities they present, many lack the strategic skills necessary for high and sustained growth. In nearly 90% of creative businesses, for example, fewer than one-half of all senior managers have received any training in business strategy. Only 35% of creative businesses have specific financial goals for the future, and less than two-thirds of those that do include these goals in a formal business plan.'

4.3.3 These research findings are consistent with those of the Creative Economy Programme

The Access to Finance and Business Support Working Group concluded that while many creative businesses cite lack of access to finance as a barrier to business growth (a finding from our qualitative research):

'The key obstacle for many firms is not the availability of finance *per se*, rather, it is the capacity to make effective use of funds that would otherwise be forthcoming. [ ] It is the argument of the Working Group that improvements to business support services for creative businesses could help to improve access to finance for these businesses, where it is required for growth.'

Many creative enterprises in this audit did cite lack of access to finance as a barrier to growth but as over half of our respondents do not appear to have a business plan we conclude that the case made by the CEP working group has merit.

4.3.4 BAP will need to consider its positioning if it wants to engage with the creative industries

One in ten of the enterprises called refused to participate in response to the phrase 'Buckinghamshire Arts Partnership' and those enterprises were most likely to have a turnover of between £50,000 and £250,000 or £250,000 and above.

While the size of the sample means that any conclusions must be tentative, it is possible that the name of the organisation, which includes the word 'arts' alienates creative industries who do not perceive themselves as being about the 'arts' and associate the word with a lack of appropriate 'business-like' or 'commercial' attitudes.

4.3.5 There is a need for specialist support for businesses with high growth potential

Consistent with the findings of the CEP working group, we found a segment of creative enterprises with a potential for high growth and who have the leadership and management skills in place. They have identified a glass ceiling which means that on their own they are unable to reach wider markets. This would suggest a high return on investment for specific interventions to targeted creative enterprises, for example, a collaborative marketing initiative targeted at companies and public bodies commissioning artworks such as public art.

5 Consultation with Steering Group Members

Steering group members are listed in section 7.5.

5.1 Individual steering group members value the networking opportunities provided by BAP

- 'BAP enables us to have a wider understanding of what is happening in the County.'
- 'Local authorities have to work together through Pathfinder, so the arts would have been left behind if it wasn't for BAP.'
- 'BAP helps me stay plugged in to what is going on.'

5.2 Steering group members value BAP most when it adds value to their own work

- 'The youth project is something that we do anyway, but the audit is something new, something that we wouldn't have done by ourselves.'
- 'We put money into the Adopt an Artist scheme because it helps us achieve our goal of tangible commercial outcomes.'
- 'BAP does wider advocacy work and that helps me. As a single arts officer my impact is fairly limited.'

5.3 The gap between the priorities of different steering group partners is considerable

- 'BAP would have to instigate projects with disengaged groups and communities for me to increase my level of investment in the partnership.'
- 'BAP needs to be aligned to businesses – the economic aspects – for me to put more money in.'

5.4 There is synergy between the district councils consulted

- 'Our goals for the next five years are around the Growth Agenda. But the quality of life agenda is there too. We need to be more responsive to the needs of local people.'
- 'We believe there is a significant creative economy out there. We just need to prove it. The council is focused on regeneration, economic development as well as arts development.'

5.5 Steering group members would like BAP to have a clear direction

- 'I am used to working in partnership, but it takes up a lot of my time.'
- 'The youth project changed direction, which made the benefits to us tenuous.'
- 'BAP needs to relate to where we are going for us to maintain the investment.'

6 Conclusions and Recommendations

6.1 The project has provided a wealth of statistical data

The first key reason for commissioning the work stated in the project brief was 'to provide an in depth knowledge and understanding of the creative industries in Buckinghamshire.' The project has achieved this. In addition to the maps and analysis of section four, the project has provided a database with 1,708 records for further statistical analysis. Each data entry has a unique record number, a local authority district, postal sector, postcode, cultural domain, stage in the cultural production cycle, category of main activity and a description of main activity plus turnover and number of employees. This means that any BAP partner can undertake subsequent analysis as required.

Unlike the Ancer Spa research for SEEDA, this database includes individuals and enterprises below the VAT threshold as well as those VAT registered. It also includes enterprises for which there is no easily disaggregated SIC code, most notably those engaged in crafts and design excluded from the Ancer Spa audit.

Recommendation:

- BAP makes the statistical database available to each steering group member for their own analysis, as required.
- The statistical database from the project is compared with the comparative database produced through the MKSM creative audit to build a more complete picture of a sector that crosses administrative boundaries.

6.2 The project has provided a clean database that is data protection compliant

The second key reason for the work, stated in the project brief, was for the 'data collected to form the foundation information for the development of a creative industries website'. The project has created a database with 101 entries. The information collected comprises:

- Contact name
- Address
- Postcode
- Postal sector
- Cultural domain
- Stage in the cultural production cycle
- Category of enterprise
- Description of main areas of business
- Turnover
- Number of Employees
- Time trading
- Website address (if any)

It also includes the following consents:

- Consent to join the database
- Consent to receive information from BAP

- Consent to be listed on proposed website

There is a third database which includes the personal data of creative industries from the Level One research. BAP have the option of making a single written communication to these organisations before 4 August 2007 (to comply with the conditions of the purchase of the data). There are 1,511 entries on this database. In addition, there are 77 contacts with telephone numbers but insufficient other data to be included in the statistical analysis and 18 contacts which were received too late to be included in the Level Two research. There are 54 organisations with some kind of contact information that were excluded from the audit because of their amateur status.

It is unclear why BAP wants to set up a website that comprises a searchable database of creative industries in Buckinghamshire.

Recommendation:

- BAP decides upon a clear strategic direction for itself in the first instance, and delays making a commitment to the website with a searchable database until it has done this.
- If BAP still decides to commission a website with a searchable database, that BAP is clear about how this supports the growth of creative industries in Buckinghamshire, and has the resources in place to maintain the website for a three-year period.
- If BAP decides that it wants to contact the purchased named contacts from the Level One research, that it does so by 4 August 2007 in order to comply with the conditions of purchase.

6.3 BAP needs to define its strategic direction

BAP has a steering group with a broad range of agendas, as noted in section five.. This has contributed to making it difficult for BAP to develop a clear direction and prioritise its resources in response to that clear direction.

The aims of BAP are general:

- Raise the profile of creative industries in Buckinghamshire
- Increase funding opportunities
- Achieve a more integrated approach to creative development
- Achieve sustainability for the work of the partnership

Thus it has been difficult to translate these aims into a coherent work plan. BAP has defined its priorities for 2006-08 as follows:

- To undertake a county wide creative industries audit and explore ways of delivering proposed recommendations
- To develop an 'Adopt an artist Scheme', pairing local artists with businesses, and encouraging the economic well being of both, and devise of way of sustaining this work
- Youth project work in liaison with the police and schools
- Explore project opportunities linked to the Olympics

To deliver these priorities, the level of resources is modest, namely: a part-time co-ordinator and income of £44,004 for 2007/08 (Income was £75,500 in 2006/07 and £34,100 in 2005/06),

Thus BAP is simultaneously seeking to work strategically within a creative industries context (the creative industries audit), and deliver participatory arts projects (the youth project based in schools).

As a result, BAP is in danger of fragmenting, with steering group members becoming unclear about the tangible benefits of subscribing.

Recommendation:

- BAP commits to deciding upon a strategic direction.
- BAP ensures that all steering group members buy into the DCMS definition of the creative industries.
- The strategic direction is informed by the MKSM creative audit.
- The strategic direction is supported by SEEDA and ACE South East.

6.4 The priorities of steering group members are informed by values

As previously stated, there is a broad range of interests among steering group members that have contributed to BAP committing to a spectrum of activities. It is likely that these interests are informed by internal values, which, at heart, are about perceptual differences between 'the arts' and 'the creative industries.'

The left hand column describes a set of beliefs that are largely about investing in the arts because of their intrinsic value. The right hand column describes a set of beliefs about the creative industries, of which the arts form a part (for example, they cover around six of the categories listed in the DCMS subsets of the core domains in section 7.3).

The arts are defined as involving artists engaged with the visual arts, dance, drama, crafts and local authority museums.	Creative industries are all that plus design, fashion, architecture, media.
The arts are special and different.	The creative industries are businesses that use the same processes are any other and benefit from investment and offer the same economic potential.
Largely aim for cultural and social benefits.	Largely aim for economic and social benefits.
Require subsidy because they are not about generating money.	The creative industries contribute to the economic growth and wellbeing of the UK and have the capacity for increased productivity and growth.
Local and inward looking.	Non-geographic industry sector focus that crosses industry boundaries.
Democratisation of culture (people being brought to a pre-existing definition of the arts eg workshops).	Cultural democracy (art is what is what the consumer says it is – market driven).
Audience development: about qualitative relationships.	Increasing sales: about quantitative relationships plus qualitative (in order to win and retain customers).
Community cohesion (social and cultural capital as the starting point for community wellbeing); social entrepreneurs.	Regeneration of existing localities and growth agenda involving creating new communities (economic capital as the starting point for community wellbeing); entrepreneurship.
Artistic imperatives are the primary driver; tension between artistic, financial and social goals; intrinsic validation.	Artistic imperatives in tandem with economic objectives which inevitably involves an awareness of the market; extrinsic validation.
Focus is on bringing together artists and audiences,	Usually the consumer is in control of the mode of

visitors or participants, often in a specified and 'special' place, for an artistic experience which is controlled by the artist.

consumption eg reading a book, listening to a CD, looking at a painting in their own space etc.

Recommendation:

- BAP steering group members agree whether they are largely about 'the arts for arts sake' or largely about 'the creative industries which includes the arts" when considering the strategic direction of BAP.

6.5 BAP will have a greater impact working strategically, instead of delivering projects

Nationally and regionally there are many areas of work either about or involving the creative industries, for example, the forthcoming findings from the Creative Economy Programme, the Regional Economic Strategy and SEEDA's framework and action plan for developing the creative industries, ACE South East's priority growth areas and the multi-agency approach to sustainable communities through Where We Live. For Buckinghamshire to be a key player in these fora, and thereby maximise the impact of these agendas for the benefit of the people of Buckinghamshire, there is a compelling logic for the five local authorities to use BAP as a collective voice. This would mean BAP working strategically instead of tactically.

The district councils already have effective arts officers with an intimate knowledge of arts provision in their respective districts. Their needs seem less about additional projects and more about either increasing capacity (a skills issue) or embedding the arts and creative industries agenda across a range of departments and with elected members (an advocacy issue). Again, this suggests merit in abandoning direct projects. This audit also identified some hostility towards the local authorities by a few arts organisations that perceived they had started projects that competed directly with the arts organisations' existing activities. It is important that BAP does not exacerbate this.

BAP's current model seems to be about taking a project that works well in one local authority area and duplicating it across the others. As a result, it becomes difficult for BAP to demonstrate its added value to all local authorities.

There are good online directories for artists through fora such as the Chiltern Arts Forum, Arts 4 Every 1 and Aylesbury Vale arts council. This suggests that an additional online database may duplicate current, albeit fragmented, provision, However, the qualitative research of this project suggests that these directories do not meet the needs of professional artists in reaching wider markets. This points to a gap in strategic support.

Changes in Arts Council England funding policy means that grants must either come from Grants for the Arts for projects, from managed funds for particular strategic interventions or from Regularly Funded Organisation status. BAP's current mix is unlikely to attract Arts Council subsidy in future.

Recommendations:

- BAP agrees to only provide projects directly where there is no other appropriate delivery mechanism already in existence.
- The strategic direction adds value to the work of each of the five local authorities, ie it enables them to achieve things they would not otherwise be able to achieve working alone.

6.6 A possible strategic direction for BAP: become an advocate for the creative industries and heritage in Buckinghamshire

At a regional level, BAP becomes the first point of contact between the regional players and the five local authorities as regards the cultural industries, specifically the creative industries (including arts) and heritage. This would make it straightforward for the county to engage with and be consulted by SEEDA, ACE South East, the regional cultural consortium and other regional players.

In addition, BAP would act as a first point of contact between the national cultural agencies involved in the DCMS/DCLG agreement, 'Where We Live' around sustainable communities and the five local authorities. This would be a catalyst for the local authorities levering additional resources into the county.

At a County and District level, BAP would work with key decision-makers within each local authority, both elected members and the executive, to help them make effective use of the creative industries (including the arts) and heritage to achieve their objectives including, for example, those stated in Buckinghamshire's Community Plan and the Local Area Agreements.

At a local level, BAP would work with individual local authorities to help them build the capacity of the arts within their area.

This strategic direction would probably involve each of the five local authorities increasing their investment in BAP to around £12,000 each per annum, with the possibility of £20,000 from ACE South East through Grants for the Arts or managed funds. This 'pot' of around £80,000 would pay for a senior member of staff, administrative support and overheads.

The rationale for increasing investment in BAP would be that by working together at a strategic level the size of the cake would increase and as a result each local authority would see a greater level of investment in the creative industries and heritage in their district over a three-year period.

Recommendation:

- BAP considers the possibility of this as a strategic direction
- BAP discusses this possibility with ACE South East
- BAP considers how current steering group members who are not local authorities would be part of this process and outcome

6.7 A possible strategic direction for BAP: become a business support unit for a defined sub-set of the creative industries

BAP would develop creative businesses in Buckinghamshire with a particular focus on potential and existing freelancers, sole traders and small businesses (up to 10 staff) working in the Visual Arts (including artists, designers and craft makers), Performance domains and in digital media. The film and television sectors already have a highly developed support infrastructure that covers the whole range of enterprises from pre-start up to multinationals.

This audit has demonstrated the size of the creative industries in Buckinghamshire. The Creative Economy Programme's Access to Finance and Business Support Working Group has concluded that:

'The creative industries are capable of increased productivity and growth. However, creative businesses are only likely to make this contribution if they receive the appropriate forms of advice, support and investment.'

The CEP report also recommends that creative businesses with a high potential for growth (about 5%) are given business accelerator services, which may fit well with the brief of StART.

StART MK is a creative industries business advisory support (CIBAS) unit located in Milton Keynes and supported by a number of partners, including ACE South East. To build on the success of StART, and support its development, it would be sensible to explore the possibility of investing in StART to allow its brief to include the creative industries in Buckinghamshire.

The government is committed to streamlining government support for small businesses through the Business Support Simplification Programme, in which SEEDA is taking a lead role. The programme involves reducing the number of schemes from around 3000 to 100. Again, this would support the case for working collaboratively with an existing creative industries support unit, namely, StART.

Creative Leicestershire and CIDA are models worth considering. These units provides a range of business support services including e-bulletins, one-to-one advice, funding, niche training, networking events, promotional projects, workspace development, HE and FE support and advocacy work. (See 7.4 for further information on Creative Leicestershire.) These services complement and work in tandem with the support services of Business Link and the relevant local authorities.

BAP would be attentive to the contribution that the creative industries make to the regional economic strategy for the South East:

- Global competitiveness: investment in success
- Smart growth: lifting underperformance
- Sustainable prosperity: supporting quality of life

StART has cost approximately £60,000 to operate over an 18 month period, that is to say, around £40,000 per annum. Thus each local authority could contribute £8,000 each to double the annual operating costs, with an additional £20,000 requested from ACE South East or SEEDA.

Recommendation:

- BAP considers the possibility of this as a strategic direction
- BAP engages in a dialogue with StART, SEEDA and ACE South East to explore this possibility further, and to establish the costs involved.
- BAP considers how steering group members who are not local authorities would be part of this process and outcome

6.8 A possible strategic direction for BAP: BAP focuses on advocacy in Buckinghamshire and contracts StART to support the creative industries in Buckinghamshire

This is a more ambitious step that would result in achieving both the previous strategic directions. While it will be a more expensive option, it also offers the potential of high returns and a more rapid rate of success.

With this option BAP sets itself up as a unit described in 6.6. This unit will be engaging with regional players to maximise inward investment for the county in terms of the development of the arts and creative industries. Across the county, it will be working with elected members and senior executives to help them use the arts and creative businesses to achieve the economic and social objectives enshrined in the local area agreement and community plan. It will also work with individual authorities to help them build capacity at a grass-roots level.

In addition, the unit will manage the service level agreement between StART and the five local authorities of Buckinghamshire. Through this agreement, the scope of StART is extended to include the creative industries across Buckinghamshire (described in 6.7).

This option, which effectively combines the options summarised in points 6.6 and 6.7, would cost each local authority around £20,000.

Recommendations:

- BAP considers this possibility as a strategic direction
- BAP follows the recommendations of sections 7.6 and 7.7
- As recommended previously, BAP engages with the findings of the MKSM creative industries audit before making a final commitment to any strategic decision

7 Appendices

7.1 Level Three Qualitative Questionnaire

Hello, my name is [name]. I'm calling on behalf of Bucks Arts Partnership. That's made up of the four district councils in Buckinghamshire. You very kindly helped us by answering some questions about your business to help them make the case for more support for creative businesses. You also said you would be willing to talk about what you need to develop your business/work/organisation.

Is now a good time to talk – it will take about 15 to 20 minutes.

[If no, arrange time to call].

1. Do you expect your [business to grow/work to develop] over the next 12 months?

Yes/No/Don't know

2. What has been the most important factor that has helped your [business to grow/work to develop] in the past?
3. What do you see as the barriers to [growing your business/developing your work]?

Nothing

Don't want to grow

Access to finance

Bureaucracy e.g. tax, company registration etc

Lack of skills (If yes, see question 6)

Cash flow

Competition

Finding workspace

Can't find appropriate training

Low sales

Market shrinking

Reaching customers

Time constraints

Too risky

Transport infrastructure

Other (please specify)

4. Have you had any business advice help or support in the past 5 years?

Yes/No/Don't know

If yes:

5. What kind of support

Advice on intellectual property rights, patents, copyright etc

Advice on technology

Business start up advice

Financial advice eg securing loans etc

Given a grant

Given a loan or secured investment

Help to find workspace

Help with business planning

Import/export advice and information

Legal advice

Market information

Training

Other (please specify)

6. Who provided it

Accountant

Arts Council

Bank

Business Link

FE or HE education institute

Chamber of Commerce

Local Council

Parents/ Family/ Friends

Princes Trust

Professional or trade association

Regional development agency

Solicitor

Other (please specify)

7. How satisfied were you overall with the advice, help or support you received?

Very satisfied

Satisfied

Neither satisfied nor dissatisfied

Dissatisfied

Very dissatisfied

Don't know

If no:

8. Why didn't you get any advice, help or support?

None needed

Did not occur to me to get any

No relevant support available

Didn't know what was available

Can't afford it

Can't spare the time

Too far away or difficult to get to

Other (please specify)

If the answer to 3d is anything except 'None needed'

9. What kind of business advice, help or support do you need that you have been unable to find or unable to take advantage of?

If skills mentioned in responses to Q2

10. You said earlier that lack of skills was hampering the [growth of your business/development of your work]. Could you say what kind of skills you or your staff need

Admin & legal

Creative including design etc

Finance, tax, accounts etc

Fundraising

Management/business planning

Marketing and sales

Specialist technical (sector specific)

Technology

Training or teaching

Other (please specify)

If training mentioned in responses to Q3a

11. You said earlier that you had received training in the past five years. Have you had any training in the past 12 months?

Yes/No/Don't know

12. Is there any training you or your staff need that you cannot get in your area?

Yes/No/Don't know

If yes, please specify what kind of training you need to be provided in your area?

Admin & legal

Creative including design etc

Finance, tax, accounts etc

Fundraising

Management/business planning

Marketing and sales

Specialist technical (sector specific)

Technology

Training or teaching

Other (please specify)

13. What changes are needed that would [help your business/support your work]?

14. The following are possible services that Bucks Arts Partnership could provide or facilitate. Please pick the three that you think would [help your business/support your work] the most:

Advocacy on behalf of creative businesses eg to local authorities, regional development agency etc

Business surgeries (one-to-one advice sessions)

Grants for business advice eg help to write a business plan or marketing plan

Grants for equipment

Grants for marketing

Grants for training

Information eg about training, funding opportunities, jobs/commissions, places to work etc

Networking, opportunities

Opportunities to showcase or to market your work

Providing workspaces

Training opportunities

15. Is there anything else you would like to see Bucks Arts Partnership doing in the future?

7.2 Text of responses to Level Three Research Question 10

- BAP could help advise on IT issues: what's available and how to use it.
- BAP could help broker links between different artforms, e.g. help artists meet up with filmmakers and other areas that may be able to use them.
- BAP could help facilitate better networking between artists
- Being a focal point for discussion - ideally 'concrete' (i.e. through meetings) rather than as a vague web presence.
- Better communication about what BAP is, perhaps with a central forum to meet others involved.
- Could help provide subsidised access to professionals, e.g. an accountant, for small businesses.
- Could provide help and advice on how to deal with the baffling bureaucracy of applying for grants.
- Create a showcase of local artists to be promoted to non-traditional gallery attenders (i.e. Joe Public) to excite them about local artists.
- Encourage local press to cover the arts, especially when promoting the work of individuals as opposed to organisations.

- He gets bookings by big national clients, but not from public bodies within Bucks. Thinks BAP could help promote the facilities available locally, and could help explain the need for quality, etc., over price to non-arts organisations who might be potential customers
- Help artists be more aware of who else is working in the region - currently very dispersed and little communication between people.
- Help artists learn how to tap into businesses (e.g. for finance).
- Help bringer younger people into the business. i.e. helping young furniture makers set up - when he started he found he was ineligible for every grant.
- Help connect buyers with sufficient money with the artists.
- Help put him in touch with potential customers.
- Help set up a collective workspace for artists in the region, but important that it develops only professionals and not hobbyists.
- Help with general promotion - who to contact, where, how to present herself, etc.
- Helping broker partnerships between artists, funders and communities.
- More schemes such as the one in Aylesbury where several mini-commissions were given to artists. Also, organise and promote residencies for artists.
- Not sure what BAP does. More work on bringing industry and arts together.
- Organise joint exhibitions to sell work of a similar kind by different makers
- Persuade local businesses such as banks to use spare windows as showcases for artists' work. This happens in the high street in her village and is very effective. Also, to lobby businesses to supply materials to sole traders - she gets frustrated that most wholesalers will only provide materials in huge amounts.
- BAP's scheme to match artists and businesses, she felt it would be useful to have a showcase of the artwork for potential businesses to see, so they could understand what it was they were getting involved with.
- She doesn't know what BAP currently do
- She mentioned the need for a central information point to support and promote the arts in the region. Obviously this is BAP's purpose, but she evidently didn't feel it was known as that at the moment.
- Strongly feels QPAC (Queens Park Arts Centre) is the most important facility for any artists in the region, but that it is poor at things like fundraising so if BAP could help them, then they would in turn help many individual artists. Basically - support the existing support structures and create better partnerships between them.
- To help make art visible in public places through forging links with the community, e.g. displaying art in post offices, or having artworks as prizes at charity events.
- To make sure BAP doesn't close! Local councils now generally refuse other support as they say they fund BAP to deal with the arts. So her fear is that if BAP closed then that support for the arts from the council would just disappear altogether.
- To promote local artists and their specialities so potential customers know what is available on their doorstep.

7.3 DCMS Definitions

The creative industries are defined by the DCMS as the Audio-Visual, Books and Press, Performance and Visual Arts domains. The Arts are defined as the Performance and Visual Arts domains. Note that music is included in Audio-Visual because of its organisational and production chain links within that domain.

The Heritage domain is usually included within the wider field of the cultural industries rather than within the creative industries. Local authorities at county and unitary level have a responsibility for Heritage and Buckinghamshire directly manages museums, libraries and some historical monuments and buildings.

Audio-Visual
Creation of cinematographic works and audio-visual (non-cinema) works
Creation of advertising materials
Creation of musical works
Creation of multimedia works
Production of relevant capital and consumer goods (e.g. sound mixing desks, broadcast transmission equipment, cinema projectors etc.)
Performance activities of music groups, orchestras, and companies
Production of films for the cinema
Production of films (non-cinema)
Production of radio programmes
Production of television programmes
Production of commercials (TV, radio and cinema) and outdoor and press advertising materials
Production of music, sound and audio-visual recordings
Production of multimedia works (inc. leisure software, digital arts and new media)
Services relating to the production of musical, broadcast and multimedia works (including agents, managers, and promoters)
Media buying, planning and evaluation
Dissemination of activities of concert halls and music venues
Distribution of film
Distribution of recorded music
Distribution of multimedia works
Cinema management
Organisation of festivals and fairs
Radio broadcasting
Television broadcasting
Trade/sales in music, sound and audio-visual recording
Trade/sales in multimedia works
Education and training activities
Activities of specialist press/media; criticism etc.

Books and Press
Creation of literary works (activities of authors)
Drafting of articles for newspapers, magazines and periodicals (activities of journalists)
Book production
Production of relevant capital and consumer goods
Newspaper, magazine and periodical production
Activities of press agencies
Activities of literary agents
Organisation of book/reading festivals and fairs
Trade/sales in books
Trade/sales in press publications
Event organising and awareness raising (including amateur training)
Education and training activities
Activities of specialist press/media; criticism etc.

Heritage

the dissemination function that lending libraries fulfil (with particular reference to Books and Press and Audio-Visual)
the archiving/preservation function undertaken by museums, libraries and archives (particularly relating to Visual Art, and Books and Press)
the exhibition/reception function of museums and historical monuments and buildings (particularly relating to Visual Art)

Performance
Creation of theatrical, choreographic and circus works
Production of live entertainment
Activities of companies (dance, theatre, circus etc.)
Services relating to the production of live entertainment (including agents)
Dissemination activities of dance theatres, drama theatres etc.
Organisation of festivals (dance, theatre etc.)
Event organising and awareness raising (including amateur training)
Education and training activities
Activities of specialist press/media, criticism etc.

Visual Arts
Creation of visual works (including sculpture and crafts)
Design-based activities (fashion, interior, building (aka architecture), graphic and product design)
Production of visual works (including printed reproduction and production of casts)
Production of relevant capital and consumer goods (e.g. artists' paint and materials)
Exhibition of visual works
Organisation of festivals
Event organising and awareness-raising (including amateur training)
Trade/sales in visual works and antiques (art galleries and auction houses)
Trade/sales in reproductions and casts
Education and training activities
Activities of specialist press/media, criticism etc

7.4 Creative Leicestershire

WHAT WE DO

Creative LeicesterShire works to develop creative businesses in Leicestershire, Leicester and Rutland. The programme is focussed on potential and existing freelancers and small businesses working in the arts, design and media.

SERVICES FOR BUSINESSES

We send out information to a database of over 1000 businesses locally.

This is in the form of a monthly email bulletin full of information on networking, funding, jobs, commissions, skills, places to work and training. We also hold ongoing information on our website.

We give one to one advice.

Our business advice and counselling is free for up to 15 hours of support.

We have a funding scheme

Our development bursary scheme funds a £2000 development programme for 15 companies each year. The 15 companies are selected in October and work up a development programme with us to develop their business. We support them through that programme depending on how much advice is required. Only freelancers and companies employing up to 3 people from our area can apply.

We provide informal training sessions

Our programme of training events and seminars focuses on information in niche creative sectors rather than generic business skills which are provided elsewhere. Eg publishing for visual artists; screenwriting.

We run networking events

Our networking events bring together small creative companies and freelancers locally to learn and meet potential collaborators.

We run projects to help sell work and services

We help businesses to reach their local markets by supporting and creating showcases to do so. 2 projects in development are: Artslink – for participatory arts & media companies. Made in LeicesterShire for local makers, artists, craftspeople and retailers.

OTHER ACTIVITIES

Workspace Development

We actively support the development of strategic new workspace for creative businesses. Following a supply & demand study of non-office space, co-commissioned with the support of Leicester Shire Economic Partnership, we are supporting key strategic initiatives in Leicester, Loughborough and Hinckley.

Support for Higher and Further Education

We support Colleges and Universities to prepare their students to enter the local jobs market and start their own businesses. This is done through careers fairs, input to curriculum development and presentations to students.

Advocacy & profile

We make sure that policy makers are informed about the creative sector and its economic and cultural importance. In addition to presentations about the sector locally and nationally, we have commissioned a video about the potential of the sector which can be seen at our website below.

www.creativeleicestershire.org.uk

0116 267 0017

7.5 Steering Group Consultees

Amanda Brook-Webb, Head of Cultural Services at Buckinghamshire County Council

Dan Clucas, Arts and Events Manager, Aylesbury Vale District Council

Judy Munday,, Arts and Community Safety Officer, Thames Valley Partnership

Chris Rawson, Economic Development Officer, Buckinghamshire County Council

Katie Tyssen, Arts Development Officer, Wycome District Council

David Gardner, Community Projects and Revitalisation Officer, Chiltern District Council was on leave during the consultation process.

Michelle Cope, Cultural and Play Officer, South Buckinghamshire District Council, was on maternity leave and therefore unable to participate in the consultation.

James McVeigh and Emily Mansbridge from ACE South East were also consulted as part of the process but their feedback has informed the recommendations regarding possible options and not section five relating to feedback from steering group members.