Is there a future for low-tech micro businesses such as picture framers in the North East of England?

Derek Harold Redfern BA (Hons), PGCE, DPP

Whitby, North Yorkshire, UK.

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Abstract

The aim of this thesis is to identify why low-tech micro businesses, in this case bespoke picture framers which have never been studied academically, are failing to grow across the formerly industrialised North East of England. Research into micro businesses is limited and extremely fragmented with very few studies having been undertaken in developed economies, and none in the North East, into the reasons behind the lack of growth of these businesses. This research seeks to examine what barriers to growth are faced by North Eastern micro business owners in an industry that is known to be shrinking and to build on the database of academic knowledge regarding micro businesses.

Research was undertaken from the perspective of an ontological realist and utilised the ideas of thematic analysis using a data sample size of 12 OMEs, which represents 22% of the total population of bespoke picture framing businesses in North East England.

The main findings of the research showed that the majority of micro business owners chose to keep their businesses small, with a link being established between the age of the owner and growth drivers. Unless they were marketing themselves as artisans, there was a desire to use modern computerised equipment but the owners recalcitrance to invest in the future via borrowing led to a lack of it being used. There was also a lack of formal planning from all respondents which could be linked to their lack of interest in growth and investment, especially as 75% of the respondents were over the age of 50 and looking towards retirement. Nor was there interest in networking amongst the local business environment, with other framers, or being members of the Fine Art Trade Guild due to them being perceived as a poor tool for sales generation. As with many low-tech micro businesses across the region, picture framing businesses have retreated from high-profile high-street locations due to costs involved and are being operated in the main as lifestyle businesses that supplement another income. There is still a need for the services offered by micro businesses such as picture framers, but it's growing increasingly difficult to generate a living out of them.

The key contribution of this research is that for the first time, a study of an industry in the North East that is dominated by low-tech micro businesses has been undertaken, as well as it being the first time the picture framing trade has been studied academically. The research attempts to build a case study that will provide a benchmark that future studies can be compared to, both in the North East and in other areas of the UK, or beyond, for both related and non-related micro businesses fields. The research has also contributed to the understanding of the link between age and investment which will aid business consultants in their understanding of the requirements of such micro businesses when trying to help them to grow.

Statement of original authorship

I confirm that I, Derek Harold Redfern, am the sole author of this thesis and that all work was carried out by myself. All work accredited to other authors has been referenced correctly and consistently following a Harvard style system.

Derek H. Redfern

1st November 2024

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Abbreviations

Abbreviation	Meaning
A	Advanced
CDFI	Community Development Finance Institution
CEO	Chief Executive Officer
CFIST	Customer Facing In-Store Technologies
CMC	Computerised Mount Cutter
FATG	Fine Art Trade Guild
FSC	Forestry Stewardship Council
GCF	Guild Commended Framer
GDHI	Gross Disposable Household Income
GVA	Gross Value Added
HBB	Home Based Business
HMRC	His Majesties Revenues and Customs
HNC	Higher National Certificate
ICT	Information and Communication Technology
IMD	Index of Multiple Deprivation
IP	Internet Protocol
IT	Information Technology
KIBS	Knowledge Intensive Business Services
LTD	Limited
MSME	Micro, Small, Medium Enterprise
NEC	Northern Exhibition Centre
NELEP	North East Local Enterprise Partnership
NIC	National Insurance Contributions
OECD	Organisation for Economic Cooperation and Development
OME	Owner/Manager Entrepreneur
ONS	Office for National Statistics
PC	Personal Computer
PEFC	Programme for the Endorsement of Forest Certification
PESTEL	Political, Economic, Social, Technology, Environmental, Law

PLC	Public Limited Company
POS	Point Of Sale
R&D	Research and Development
RM	Risk Management
SBA	Small Business Advisors
SDG	Sustainable Development Goals
SME	Small, Medium Enterprise
SOI	Sustainable Orientated Innovation
SWOT	Strength, Weakness, Opportunity, Threat
UK	United Kingdom
US	United States (of America)
UV	Ultra Violet
VAT	Value Added Tax

Chapter 1 – Introduction

The picture framing trade has existed in its present form since the latter half of the 19th Century, with companies manufacturing the raw materials that are then sold to picture framing businesses via wholesale suppliers or, if they are large enough, straight from the manufacturers. The heyday of the trade is seen as being from the early 1970's to the late 1990's, with most advancements in equipment being found during this time.

The researcher has worked within the trade on-and-off since 1989, in both the retail and wholesale side of the trade, and in two different regions of the UK – the North East where he was born and witnessed the impact of deindustrialisation in the region, and the South West. However, in recent years, he's become interested in why the picture framing businesses in the North East of England never appear to expand much in terms of multiple branches or employees but rather, in recent years, has seen a decline in numbers since his full-time employment in the wholesale side of trade ended in the late 1990's.

Therefore, this research seeks to establish what the present situation is amongst the picture framers of the North East by creating a case study; what has brought about the changes that have occurred and whether there is a future for such businesses in the region.

Chapter 1 structure

Chapter 1 seeks to outline the background to both the picture framing trade and the North East of England in order to help the reader to build an image of the industry and region. The emerging importance of micro, small and medium enterprises (MSMEs) to the economy as a whole is also outlined complete with UK and North Eastern economic data to continue the process of building up background knowledge for the reader.

Chapter 1.1 provides context data on the growing importance of SMEs in the UK economy including key economic data from reliable secondary sources.

Chapter 1.2 outlines the state of the UK economy so as to provide a background for the reader to understand where the North East fits when compared to this data.

Chapter 1.3 provides a description of where the North East of England is located and the economic challenges that it has faced since the latter part of the 20th century. Economic data is provided so as to compare against national figures provide in Chapter 1.1. Finally, the reason why the region was chosen to be the centre of study is provided.

Chapter 1.4 provides a potted history of the picture framing trade which demonstrates how the structure of the trade was built up to what we see today. The main equipment and stock used in the trade is then described along with who the main suppliers to the UK market are. This is followed by a brief description of who the consumers of picture frames are and why the picture framing trade was chosen.

Chapter 1.5 provides an outline of what methodology was to be used for the research, with reasons provided as to why the methodology was chosen.

Chapter 1.6 provides the delimitations of scope, key assumptions and their justifications, and a small conclusion in Chapter 1.7 rounds up the chapter.

Chapter 1.7 gives a concise conclusion of Chapter 1 and a brief introduction to Chapter 2.

1.1 – Acknowledging the importance of SMEs

Defining an SME is a problem. According to the European Commission, SME limitations are defined as "enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding €50 million, and/or an annual balance sheet total not exceeding €43 million." (*SME action plan 2018 to 2019*, 2019). To be classed as an SME, a business must meet at least two of the three criteria. The UK government has recognised and uses this definition.

However, other countries have different definitions which makes international comparisons difficult. The upper limit in terms of employees is usually 250, although some countries lower it to 200 whilst in the USA it's 500.

The problem with this broad definition is that it encompasses a vast range of businesses in terms of size and their requirements, therefore a one size fits all policy towards SMEs doesn't always suit all SMEs, as the demands on a business with two employees are vastly different to those of a business with 240 employees in terms of financial requirements, risk, management and accounting requirements.

The importance of SMEs to the UK economy can be highlighted through the quantity of SMEs, with 5.94 million SMEs being registered at the beginning of 2020, which accounts for 99.3% of all businesses in the UK (The Federation of Small Businesses, 2020). Of these

- 0.6% are medium sized businesses (50-249 employees),
- less than 4% are small businesses (10-49 employees),
- more than 95% are micro-businesses (0-9 employees).

According to the Department for Business, Energy and Industrial Strategy, the employment that they created in 2020 equates to:

- The total turnover by UK businesses was £4.34 trillion. Of this, 52% was generated by SMEs, with micro businesses generating 36% (£1.6 trillion) of the total turnover.
- Total employment in SMEs was 16.8 million which equates to 61% of total UK employment.
- Employment in small businesses was 13.3 million (48% of UK total).
- Employment in medium-sized businesses was 3.5 million (13% of UK total) with a total turnover of £0.7 trillion (16% of the UK total).

(*Business population estimates for the UK and regions 2020: statistical release (HTML)*, 2020)

This report also states that, since 2000, there has been an increase in the amount of people employed by SMEs with

- micro businesses increasing by approximately 28%,
- small businesses by approximately 30%,
- medium sized businesses by approximately 35%.

According to Merchant Savvy though, the largest increase has been in single person companies which has seen an increase of approximately 95% (‘UK SME Data, Statistics & Charts (Updated Feb 2020)’, 2021). They report that employment growth in micro and small companies had plateaued in 2019-20, whilst single person companies continue to show the greatest growth by far, with new business registration surprisingly increasing during the Covid 19 pandemic, Q4 of 2020 being higher than that of 2019. This data is important to this thesis as single person businesses fall within the micro business classification.

1.2 – The state of the UK economy

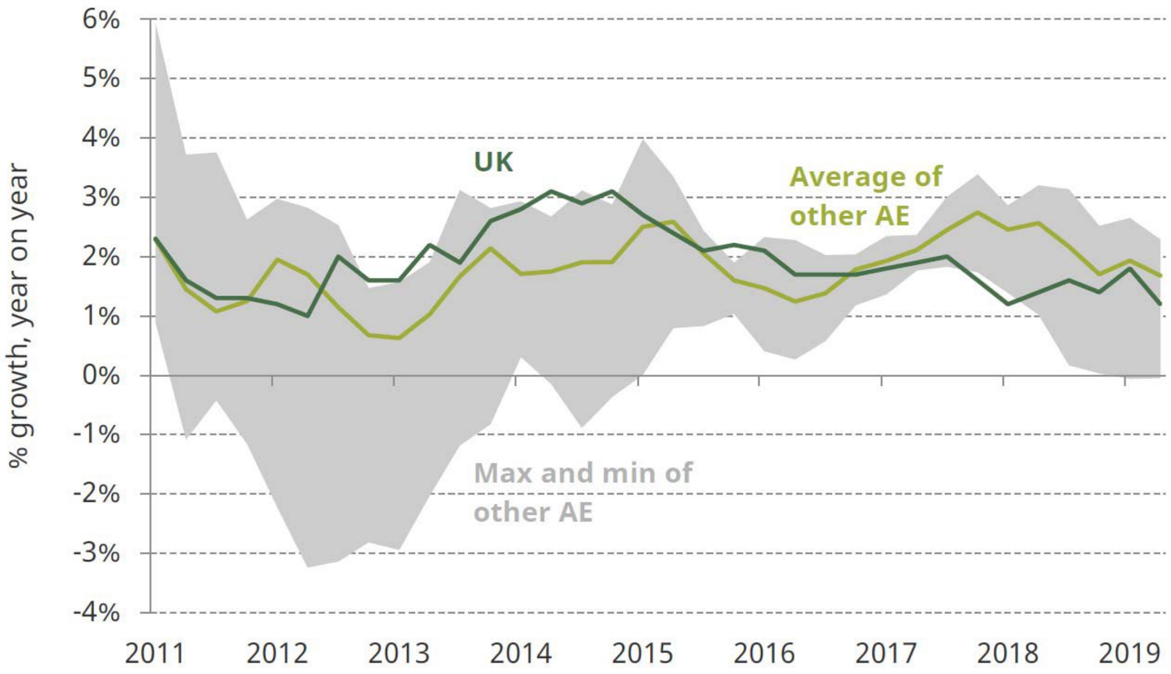
The economic cycle has an impact on all businesses, regardless of size or industry. Whilst one industry may be riding at the peak of the cycle, another may be in the trough struggling to survive. The economic cycle can be defined as

‘the fluctuation of the economy between periods of expansion (growth) and contraction (recession). Factors such as gross domestic product (GDP), interest rates, total employment, and consumer spending, can help to determine the current stage of the economic cycle.’ (Staff, 2020)

Nabarro and Schulz’s (2019) report for the Institute for Fiscal Studies highlighted recent trends in the UK economy and showed that since late 2016, GDP had grown less in the UK than any other advanced economy (Image 1).

Most advanced economies were hit hard by the Covid 19 pandemic. In 2021, the economists were projecting large scale unemployment as the furlough schemes came to an end, with up to 7.3% compared to 4.7% in 2020 (*November 2020 UK Economic Outlook - KPMG United Kingdom*, 2020), whilst Statista were forecasting 6.8% (*Unemployment rate forecast UK 2020*, no date). However, this didn’t come to fruition as the ONS have stated a figure of 4.1% (*Employment in the UK - Office for National Statistics*, 2022) which they reported was just 0.1% above pre-Covid levels. So unemployment hasn’t affected sales to any great extent within the UK.

Image 1 - Year-on-year GDP growth in the UK and other advanced economies



Note: Countries included as other advanced economies are France, Germany, Italy, Japan and the US. Max/Min series do not include UK.

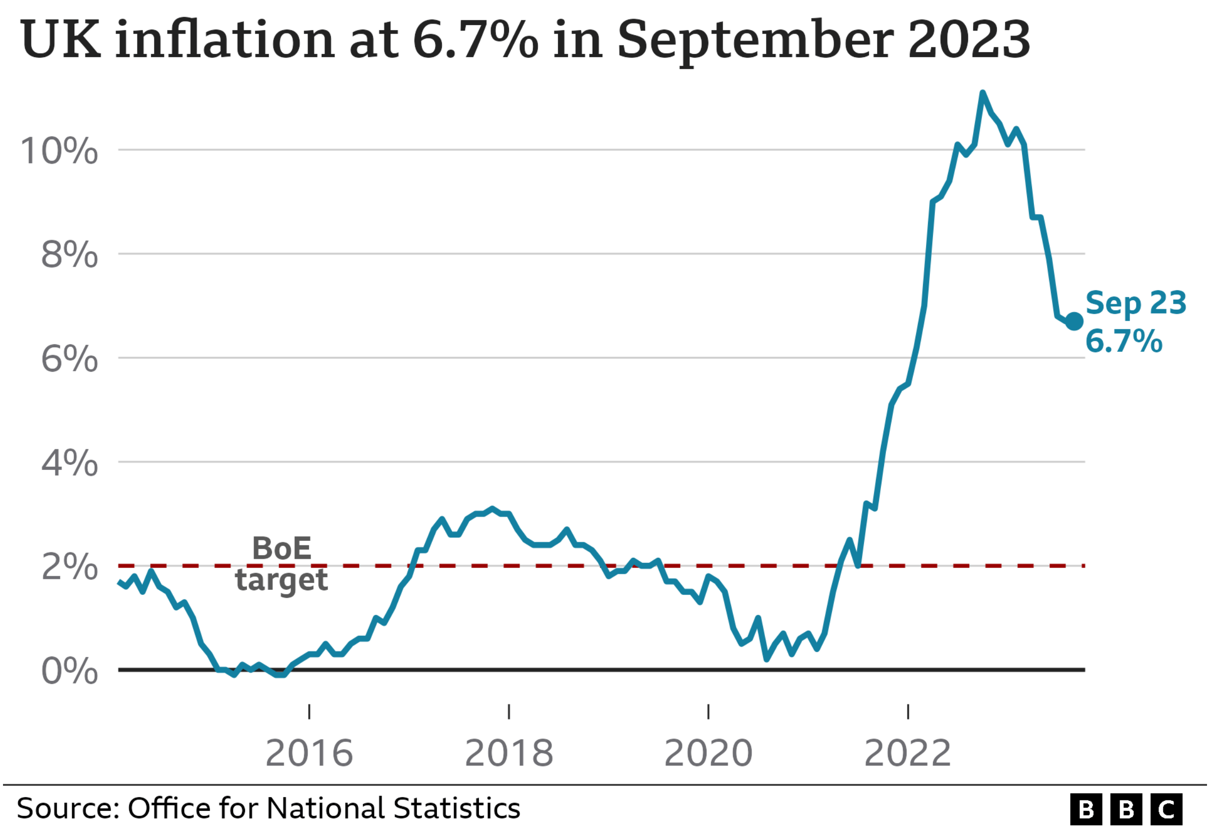
(Nabarro and Schulz, 2019a)

However, the UK seems to have been hit very hard by other factors, especially in industry sectors such as retail and leisure. According to KPMG 'output in 2020 as a whole will contract by 11.2%, nearly three times the contraction during the 2009 recession' (*November 2020 UK Economic Outlook - KPMG United Kingdom*, 2020) and is the largest decline in 300 years (*BBC News*, 2020b) but, as reported in the Financial Times, did bounce back again in 2021 with a growth rate of 7.5% (Romei, 2022) on the previous year. However, with the world, except China, beginning to open after the worst of Covid 19 towards the end of 2021, the cost of oil began to increase rapidly, pushing up peoples cost of living as it had a knock-on effect on all goods being delivered. This has been exacerbated with the conflict between Russia and Ukraine as further oil and gas supply issues have been created, as well as shortages in items such as sunflower oil.

This increase in cost of living is having a major impact on the rate of inflation (Image 2) which, as of April 2023, stood at 8.7%, which was down from a high of over 10% earlier in the year (Beckett, 2023). Businesses are reporting a reduction in the number of people spending in shops and cafes, with Google Mobility reporting 'falls in all locations except for parks' (*UK economy latest - Office for National Statistics*, 2022).

Image 2 – UK inflation rates

Source: (*BBC News*, 2023b)



There has also been the largest amount of business closures reported by the ONS since records started with, in the first quarter of 2022, for the fourth quarter in a row, more business closures than business openings (Image 3).

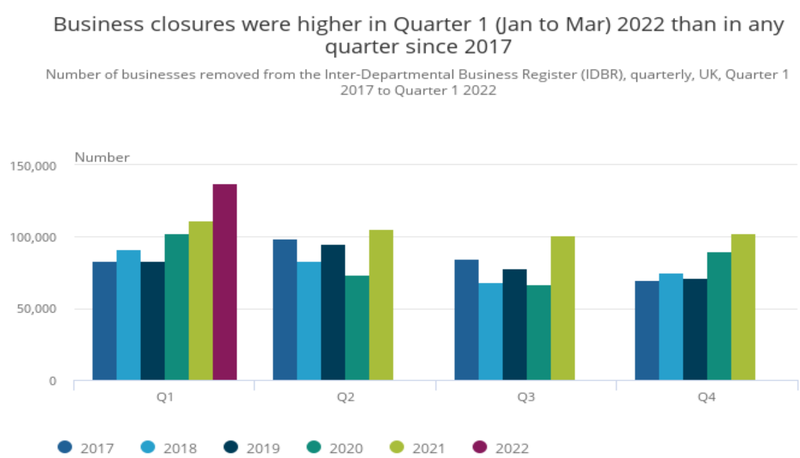


Image 3 – Business closures in the UK since 2017

Source: Inter-Departmental Business Register

The big question for many businesses at the end of 2020 was where do they sit in the economic cycle and what's its turning point? And it was no different in May 2023, with living costs increasing rapidly and household heating costs increasing on average from just over £1,000 per year in April 2019 to £2,000 per year in May 2023 (*BBC News*, 2023a). To make things worse, business heating costs are higher per unit than residential heating unit costs, so many businesses have been hit even harder than the 100% increase seen by households, with increases of 130% on average being reported by Bionic (Roberts, 2023). So businesses are seeing a reduced footfall by customers, as well as reduced spending by them, and seeing their own costs increasing.

With the feared double dip recession that The Guardian was predicting in December 2020 never happening (Inman, 2020a), businesses didn't have to put their emergency planning into action but, as already highlighted by other authors (Greenbank, 2000a; Bellamy et al, 2019), micro and small businesses don't tend to plan anyway, so have continued to respond to changes in ways that they see fit to survive.

1.3 – Framing the problem

There is a growing acceptance of the delineation between a small business and a micro business in terms of the differing demands that each has (Clark and Douglas, 2014), which has led to the question of how and whether micro businesses grow? Criscuolo, Gal and Menon (2017) found that only 5% of micro businesses ever grow beyond 10 employees, thereby becoming a small business. They also identified that new micro manufacturing businesses, that is under three years old, are far more likely to grow than their counterparts in the service sector.

Authors have argued that it depends on what the owner or entrepreneur wants from the business, with Clark & Douglas (2014) finding that over 90% of the home based businesses in their New Zealand research had growth aspirations. Moreno-Menéndez and Casillas (2021) backed up the findings of growth amongst micro businesses but found that in Spain, family run businesses grew less in terms of sales but more in employees than non-family businesses – which highlights the further complication of how to measure growth.

Research in America by Friar and Meyer (2003) suggested that there was also another point of delineation between micro businesses and high growth ventures, in that the latter tended to be set up by a group of individuals who had in-depth experience in their field and therefore tended to be 30+ years old. These individuals then collaborated on the business plan, each working in their specialist areas. This was in comparison to micro businesses whose owners tended to base their business idea on what they'd experienced as a consumer and therefore planning and setting up retail or service sector businesses on their own. Mattare, Monahan and Shah (2010) found that 73.7% of respondents in their research in Maryland (USA) also had prior experience in the field that they were working in, backing up the research of Friar & Meyer (2003).

Highly innovative micro businesses are more likely to invest in new technology and then grow internationally (McCormick and Fernhaber, 2018) but only when expectations have been exceeded, suggesting that it is confidence from success that breeds expansion internationally. But herein lies a problem – what about micro businesses operating in an environment that is slow to innovate such as the picture framing trade? Do they still grow?

Probably not internationally as the same skills and equipment are available in other countries, but what about regionally or nationally?

Focusing in on micro businesses

Most early strategic management studies tended to be focused on large businesses and very little research was carried out on SMEs. However, with the importance of SMEs now being linked to a country's growth, academics have taken a greater interest in the use of management models in SMEs.

According to Gherhes *et al* (2016),

Micro-businesses distinguish themselves from larger SMEs by being OME centric and are constrained by a tendency to be growth-averse, have underdeveloped capabilities in key business areas, have underdeveloped OME capabilities, and often inadequate business support provision.

Several researchers have pointed out the lack of empirical research into the use of strategy models in SMEs (Wang *et al,* 2011, Gatautis *et al*, 2019, Heikkilä *et al*, 2017, Gherhes *et al*, 2020) but there is even less available covering micro businesses, a sub-set of SMEs. Therefore, although this research project is concerned with micro businesses (bespoke picture framers), with so little prior research being done in either the chosen industry sector, or micro businesses in the UK in general, research carried out into micro businesses in other countries, particularly developed ones, has been included. Relevant data from developing countries has also been utilised where appropriate to help build an overall picture.

Many micro and small businesses are run as family ventures, sometimes generational if they survive long enough, and yet, as Johansson, Karlsson and Malm (2020) found in their research amongst doctoral work in the US and Sweden, there is a distinct lack of family run businesses included in core 'economic theory due to a lack of paradigmatic pluralism, axiomatic incompatibility, path dependency, institutional bias and data constraints', going on to speculate 'that integration of family business theory into standard economic modelling is likely to occur outside prestigious universities due to path dependency in research'. Pfitzner & McLaren (2018) have even raised the problem faced by governments of how to identify when a micro business is a business and when it's a hobby.

There are also questions over whether there is an ideal business model for micro businesses as research into creative businesses in Croatia by Pfeifer, Peterka and Stanić (2017) found that:

Creative services are in a state of experimentation with business model components. Diversity seems to be related to the changes in regulatory, technological, economic and social values, which are reflected in reduced sales, increased competition and more demanding customers.

Pfiefer *et al* (2017) go on to state that any micro service business operating in a niche area and which is deeply immersed in customer relations has a 'personal and intensive relationship with the customer, with intellectual capital as the main resource, and 'creativity or idea-centred' as their main components', but that business models tended to vary due to entrepreneurs choices on 'value proposition, customer targets, channels of distribution, organization of key activities, partnership arrangements, and revenue streams'. This variation in business models was also found by Heikkilä, Bouwman and Heikkilä (2017) who identified three distinct business model innovation paths that SMEs use depending on their strategic goals at a given point in time.

Gherhes, Vorley & Brookes (2020) state that 'empirical evidence on the growth constraints facing micro-businesses as an important subset of small and medium enterprises remains scarce'. Micro businesses face major obstacles to growth as many of them are OMEs with few, if any, employees which leaves them very little time to consider strategic planning as they are directly involved in the day-to-day running and operation of the business. These 'lifestyle' businesses, as they are often called, can find that 'both turnover and employment growth can be limited by the lack of ambition to grow in any respect, the lack of managerial skills and time constraints in both running the business and managing growth' (Gherhes, Vorley and Brooks, 2020a).

Isenberg (2010) defined the entrepreneurial ecosystem as 'a set of interconnected elements such as leadership, culture, capital, markets, human skills and support that foster entrepreneurial development'. Kansheba & Wald (2020) found that although some research had taken place into these entrepreneurial ecosystems since 2000, it is sporadic and tends to be very theorised in its approach stating that 'we see a need for more empirical research, especially regarding potential causal relations between elements, context factors, outputs and outcomes of entrepreneurial ecosystems'.

Gherhes *et al* (2016) found during a search of the four top journal databases, that since 1980 when academics first began to take an interest in SMEs and entrepreneurship, only '114 articles returned' were of relevance to micro businesses. Using 50 articles that met their research criteria, plus a further nine from other sources, they found that:

research on SME growth focusses on four main areas: business capabilities and practices, OME's characteristics, OME's growth ambition, and the business environment. However, micro-businesses distinguish themselves from larger SMEs in all four areas. (Gherhes *et al* 2016)

They go on to state that the main differences in the approach to supporting growth between micro businesses and SMEs is that:

growth can be stimulated by supporting the development of key capabilities and the implementation of key practices, which may highlight growth opportunities and stimulate ambition, whereas in larger SMEs it is an issue of growth opportunities and scale up.

Lussier & Sonfield (2015) looked at the differences between micro and small businesses across eight different countries, with small businesses being more likely to:

- Employ non-family member managers.
- Engage in the formulation of succession plans.
- Utilize outside advisory services.

They also:

- Make greater use of sophisticated financial management methods.
- Have a more formal management style than “micro” firms.
- Have less influence from the founder than in “micro” firms.

1.4 – Snapshot of the North East of England

The North East of England is a geographical area of the UK, the northern border of which meets up with the Scottish border, to the west is the county of Cumbria, to the south Yorkshire and to the east the North Sea.

The region (Image 4) is made up of the counties of Northumberland and County Durham; the ceremonial county of Tyne & Wear which encompasses the areas of Newcastle, North Tyneside, Gateshead, South Tyneside and Sunderland; and the former non-metropolitan county of Cleveland which encompassing the areas of Redcar & Cleveland, Middlesbrough, Darlington and Hartlepool. The main urban areas are centred around Tyne & Wear, Cleveland and to a lesser extent Durham city, with Northumberland and County Durham being largely rural and increasingly focused on tourism for income. Towns such as Hexham in Northumberland or Spennymoor in County Durham have become largely commuter areas for the urban areas of Tyneside or Teesside.

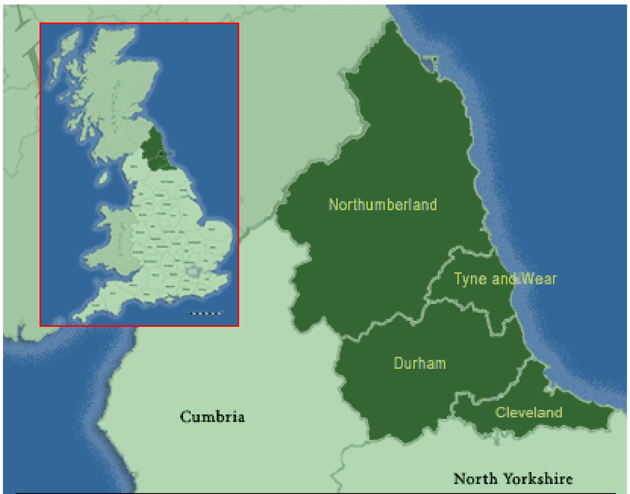


Image 4: Counties within the North East of England

Source: picturesofengland.com, no date

The North East was at the forefront of the Industrial Revolution with large coal fields being developed across the whole region to power this miraculous new age – hence the term when somethings not worth doing, ‘It’s like taking coal to Newcastle’. Heavy manufacturing was also prevalent in the region, with industrialists such as George Stephenson (1781-1848) building one of the world’s first steam locomotives, the Rocket, in 1829 in Newcastle Upon Tyne (*Stephenson’s Rocket, Rainhill and the rise of the locomotive | National Railway Museum*, 2018). Inventors such as Joseph Swan (1828-1914), who invented the incandescent electric light bulb in 1879 (Saunders, 2023) and went on to establish The Swan Electric Light Company Ltd in Newcastle Upon Tyne in 1881, whilst in 1847, W.G. Armstrong established his engineering works in Newcastle, initially specialising in hydraulics but becoming one of the world’s largest armaments companies. He was also the first person in the world to have his house, Cragside Hall, lit with electric power in 1869 (Parowary, 2019).

Heavy industry grew in strength across the region, employing hundreds of thousands of people for the next 150 years or so, with the likes of Consett being built up in the 1840's around the needs of the steel furnaces there. Middlesbrough also grew, from a tiny village of 25 people in 1829, to a major town with 7,600 people by 1851 (*History of Middlesbrough*, no date) thanks to the development of the port, the iron and steel industries, and later, chemical works in the area. Another important industry to develop in this period was ship building, with multiple shipyards being built on the Rivers Tyne, Wear, Blyth and Tees and which, by the turn of the 20th Century, were producing half of the worlds ships (*Shipbuilding History in the North East*, no date).

However, by the 1970/80's, most of these large-scale employers were closing due to increased competition from other countries and rising costs in the UK. Urban areas across the region were decimated in terms of employment, with Dr David Clark stating in the House of Commons in 1980 that his constituency of South Shields (which is in South Tyneside) had a situation where, at the '12 June, 19.4 percent of the men in South Shields were without work—one in five of the men had no jobs, and the figure is rising'. The former Redheads Shipyard had closed in 1976 ('Exhibition: Pushing the Boat Out at South Shields Museum - Cultured Northeast', 2022) and the town was still struggling to overcome this loss when Dr Clark made his speech. Worse was to come though, as the UK coal industry went to war with the UK Government in 1984-5 (*The Miners' Strike of 1984-5: an oral history*, no date) and lost, resulting in the reduction and eventual closure of all underground coal mines in the region, Ellington Colliery in Northumberland being the last to close in 2005. Westoe Colliery in South Shields would effectively cease the production of coal by the end of the 1980's and close totally in 1993 (*Westoe Colliery (1909-1993) | Co-Curate*, no date), putting further pressure on the unemployment figures. The town would remain one of the areas of highest unemployment in mainland UK right up to the time of writing this thesis.

This large-scale unemployment in these former industrial and mining areas has led to various regeneration schemes by local and national governments to attract investment and have included the likes of enterprise zones which have been set up across the region, at various points in time, in areas of high unemployment. These enterprise zones currently cover 18 different sites in North East England (*Enterprise Zones*, no date) and offer businesses reduced, or rate free, premises for up to five years to try and stimulate investment by national/international companies in the region, as well as encouraging entrepreneurs to set up SMEs (Table 1). A report in the Chronicle Live, which is a Newcastle based newspaper, reported that 'More than 1,300 jobs have been created in Enterprise Zones in the North East over the last five years, with 46 companies and £36m of investment brought to the region' (Whitfield, 2017). Success stories in this regard include the Nissan car plant at Washington, near to Sunderland, which was one of the first large foreign companies to be lured to the region in 1986 (Mullen, 2023).

As well as these Enterprise Zones, the North East was also targeted in the UK Governments Levelling Up programme, whilst Middlesbrough is set to benefit from a Free Port development on the former steel works site near the mouth of the River Tees. However, as reported in the Chronicle Online (Whitfield, 2023), following the publication of the Levelling Up, Housing and Communities Committee's report, the whole levelling up programme is threatened with failure due to the short-term funding aspect of it, which focuses on short-term capital projects. Further criticism of the Levelling Up programme has been received through research that has revealed that the North East has received 'just 5% of total grants awarded - the lowest of all UK regions' (*North East is poor relation of Levelling Up Fund*, 2023).

Table 1 - Location of Enterprise Zones in NE England

Source: Influenced by Enterprise Zones (no date) and North East Enterprise Zone (no date)

Enterprise zone name	County located in	Specialism (if any)
Ramparts Business Park Berwick	Northumberland	
Fairmoor Morpeth		
Northumberland Energy Park Blyth		Offshore energy and marine engineering
Commissioners Quay Blyth		
Bate and Wimbourne Quays Blyth		
Dun Cow Quay Blyth		
Ashwood Business Park Ashington		
Newcastle International Airport Business Park	Tyne & Wear	
Neptune Yard Newcastle		Offshore wind and renewable engineering
Swans Energy Park North Tyneside		
Royal Quays Enterprise Park North Tyneside		
Follingsby Max Gateshead		
Holborn Riverside 1 South Tyneside		
International Advanced Manufacturing Park South Tyneside and Sunderland		
A19 Corridor Sunderland		Ultra-low carbon vehicles
Port of Sunderland Sunderland		
Jade Business Park Seaham	County Durham	

Further education and re-training programmes were put into place as the industries began to close in the 1970-80's to try and help the former miners and ship yard workers etc to update their skill sets. However, a lack of opportunities to utilise these new skill sets in the region led to a brain drain effect as the best of the workforce moved to other areas of the UK, or abroad, as and when opportunities opened.

Many towns and communities have found it difficult to find a new purpose following the closure of their main employer, such as Consett's steel works or the chemical industry in Middlesbrough, which has led to the continuing migration of the workforce. This has led to communities becoming run down and neglected which further exacerbates the attempts to get businesses to invest in the area.

However, there is some light on the horizon as, between 2010 – 2017, it was reported in Developing an Innovation Ecosystem: Policy, Skills and Operations that there was a 24% increase in the amount of micro businesses in the region, although this was still below the UK average of 28% (Fernandes *et al*, 2023). This report backs up the UK Government's statistics on the growth in numbers of micro businesses in the UK.

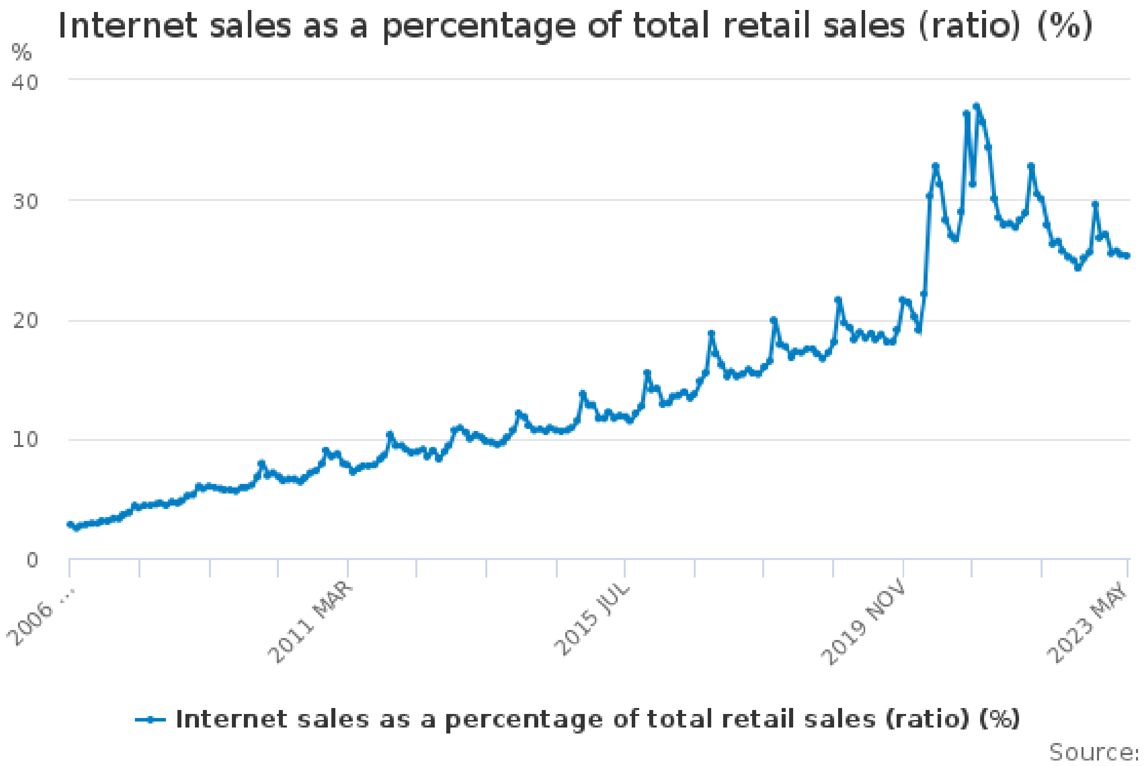
1.4.1 – Economic situation in the North East

So, were businesses in the North East concerned about 2021 and beyond, especially with the added problems in retail highlighted by the collapse of large retail chains such as Debenhams and the Arcadia Group, which had such well-known high-street names as Burtons and Topshop under their umbrella, and the way that Covid 19 may have changed the way consumers shop in that they like to go online now (Image 5)? The Retail Gazette reported that 44% of people interviewed thought that the way they shop would now be permanent (Jahshan, 2020a). However, the article doesn't state how many people were involved in the research which does raise questions regarding its reliability.

So, although almost half of the respondents in Jahshan's (2020) research said that they would continue to use the internet more after the Covid 19 pandemic, it was contradicted in research from YouGov (Retail Week, July 2020) who found that 64% of people want to continue to support local businesses, as many people have seen these small local entrepreneurs really step forward to help their local communities in ways that were not always profit based. Statistics reported on The Circular Board website in November 2021 (Martin, 2021) showed that, in the UK, 25% of all sales were online that year with that figure expected to rise to over 30% by 2024, an estimate that was reported to have come to fruition by the end of 2021 (*United Kingdom - eCommerce*, 2022). However, with Covid 19 lockdowns still being a factor in the UK, this could help to explain these figures. As can be seen in Image 12, internet sales have seen a slight drop down to about 25% by May 2023, but this figure is still higher than before the pandemic which seems to back up the YouGov research reported in Retail Week (July 2020).

Image 5 – Internet sales as a percentage of total retail sales

Source: *Internet sales as a percentage of total retail sales (ratio) (%) - Office for National Statistics*, no date



As, according to Supplier 1, most bespoke framers do not offer an online service due to the difficulty of setting up such a system, there may have been some loss of sales to online retailers offering ready-made frames in standard sizes, but overall, the bespoke services offered by framers usually demand the presence of the customer and their work on the businesses premises. So picture framers across the North East have probably not seen a large loss of sales to the e-commerce businesses.

North East SMEs versus the rest of the UK

Whilst Government figures demonstrate the importance of SMEs to the UK economy, breaking them down by region shows a disparity across the UK, with the North East of England having the lowest number of private sector businesses in mainland Britain with less than 200,000, compared to the next lowest in England, the West Midlands, on 400,000 (*Business population estimates for the UK and regions 2020: statistical release (HTML)*, 2020). The North East also has the fewest number of businesses per 10,000 adults in the whole of the UK and is predicted to have the slowest rate of population growth in England by 2026, just 1.9% (*Subnational population projections for England - Office for National Statistics*, 2018).

At a local level, in 2022, the number of enterprises per 10,000 adults was highest in Northumberland (418) and lowest in Sunderland (266), which compares to an English average, excluding London, of 483 (*Business Population Comparisons*, 2022). It is also stated in this report that areas close to large employers tend to have fewer enterprises, with South

Tyneside being reported as having the largest number of micro businesses in the North East region, suggesting that there are few large employers here. Further research is required into why these figures are so low in the North East, but a report by the Institute for Public Policy Research North (cited by Brown in The Guardian, 2023) stated that if the North East were a developed country, and following OECD guidelines, within Europe, only Greece would have a lower level of public and private investment.

Is this problem an echo of the past, when the North East relied on heavy industries for large scale employment, whereas now it is increasingly focused on 'transport and storage (including postal); construction; retail; and accommodation and food services' (ONS, 2022 as cited in a North East Evidence Hub Report, 2023)? Is it that the North East hasn't been able to adapt to the 21st Century requirements of globalisation? With the focus being on attracting outside investment into the region, are these differences in the number of private sector businesses being ignored, preferring instead to continue the historical trend of large-scale employment in the region? Although this thesis is not seeking to answer these questions, it is important to raise the issue of the difference in levels of private enterprises in the North East when compared to the rest of the UK as, unchecked, they will continue to contribute to the overall decline in regional GDP in future, as well as continue to have a brain drain effect. Further research is needed if these questions are to be answered.

When it comes to the gross disposable household income (GDHI) per head across all regions of the UK for 2019, according to the Office for National Statistics (ONS), once again the North East can be found at the bottom of the list with a figure of £17,096 (Fenton, 2020). This figure is more than £4,000 below the UK average of £21,433. This low GDHI figure is reflected in the highest unemployment rates in the UK as of January 2022, with a figure of 5.7% unemployment compared to the UK average of 4.1% (Watson, 2020).

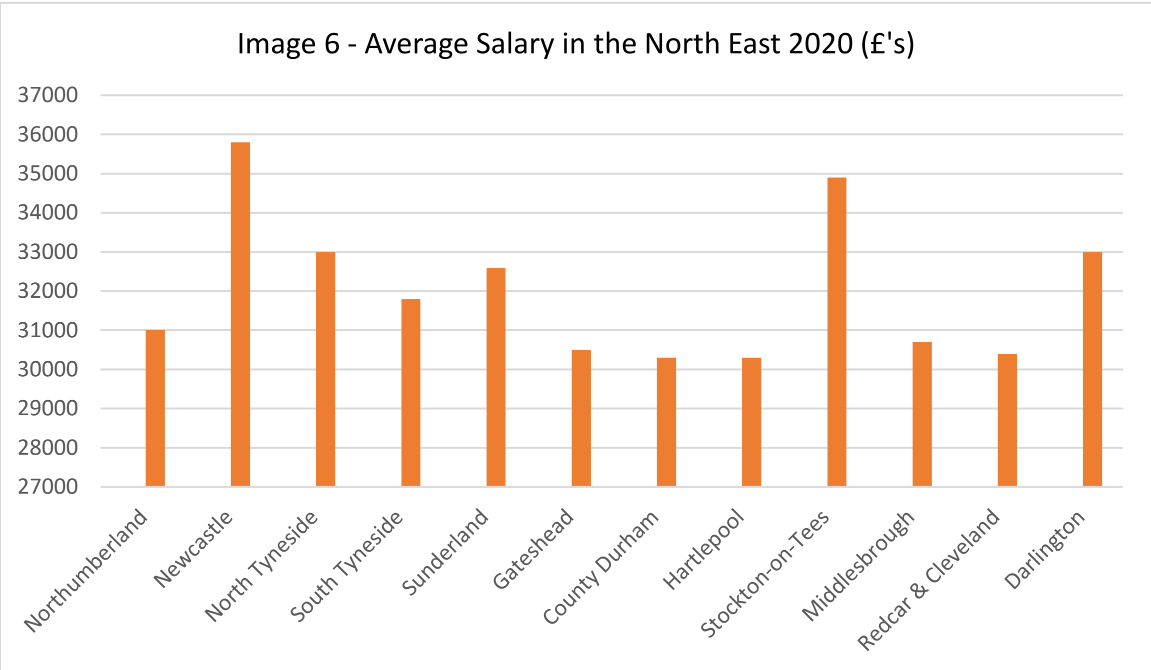
However, for the three months ending September 2020, the North East had the highest estimated rate of unemployment in the UK at 6.7% (Watson, 2020) according to ONS data, which was an increase of 1% from January that year, and which has affected the spending power of the average person more in the North East region than elsewhere in the UK. This has a knock-on effect on the picture framing trade as it may preclude a larger percentage of the population from being able to afford bespoke picture frames. However, as reported in The Northern Echo, the latest official unemployment figures actually show that the North East is now only 3.6% lower than the UK average (Hughes, 2023). This is a positive sign that may reflect large businesses such as Amazon opening up warehouses in the region - as reported on Business Live they have opened warehouses in Darlington and Gateshead in 2020, Durham in 2021 and Stockton in 2023 (Ford, 2023a), bringing 6,000 jobs in total. However, this doesn't necessarily raise the average income of the region by a large amount if these companies are paying minimum wages or employing people on zero-hour contracts.

The distribution of wealth has a direct impact on the picture framing trade as bespoke frames are considered a non-essential furniture item. However, if we think about the purchase of picture frames purely on the basis of where the wealth is, then looking at the number of picture framers in the North East by region (Figure 8), County Durham would appear to be the wealthiest area in the region, with Barnard Castle, Durham and Chester le Street being the highest value towns in the county according to a report in Teesside Live (Smiles, 2014a). To an extent, this link between wealth and location of picture framers is accurate as Barnard Castle did have a picture framer until early 2020, but he unfortunately died after contracting Covid 19 and his family closed the business down, leaving none in the town at the time of writing. Durham has the largest concentration of picture framers with five, as you'd expect from the largest city in the county (two operate from retail premises in the city centre, two out of factory units on the outskirts and one from home), whilst Chester le Street doesn't have any picture framers.

A quick look at Northumberland reveals a similar situation with Riding Mill having the highest property prices but no picture framers, followed by Corbridge with one picture framer and Bamburgh with no picture framers (*Northumberland, England's Most Expensive Properties - Zoopla*, no date a). So, it does beg the question - Do picture framing businesses set up where the greatest wealth is or are other factors also at play?

Within the North East region, Newcastle has the highest average salary (Image 6) and this would tally with areas such as Gosforth having streets recording average house prices over £1.1 million according to the Chronicle Live (Sharma, 2020b). The Gosforth area also has four picture framers, two that operate from home, one in the main shopping area and another in a retail position away from the main shopping area. The Chronicle Live tempers this story of success in Gosforth with another highlighting the poverty found in areas such as Merton Walk in Walker which 'is the most deprived area of the North East' (Miller and Dickinson, 2019a) and is the 32nd poorest in the country. Areas around Byker Bridge and Shields Road in Byker also fair badly in the research carried out by the Index of Multiple Depravation (IMD), coming in at 8th in the North East and 76th overall in England. And yet, there are three picture framers to be found in these areas located in factory units outside of the main shopping areas. So again, what are the main decisions in locating these businesses if not for passing trade? Is ease of access by car for customers and for deliveries more important or is it affordability?

Source: Plumplot, 2020



Unemployment also has a massive impact on the level of disposable income. For the period July 2019 to June 2020, the highest rate of unemployment was 8.2% in Birmingham. However, Hartlepool (7.4%) came in as the second highest and in joint third was Middlesbrough and South Tyneside at 7.1% (*Labour market in the regions of the UK - Office for National Statistics*, 2020). These figures are not unexpected as they have been unemployment hotspots for decades, but if we consider that picture framing is seen as a luxury item and is therefore linked with wealth, why is there three picture framers in Middlesbrough (two in town centre locations and one out of town), five picture framing businesses in South Tyneside (two in town centre locations, two out of town and one home framer), and two picture framing businesses in Hartlepool town centre? Why is it that South Tyneside, which is an area with higher unemployment rates than Sunderland, has one more picture framing business?

The unemployed are not the target market for bespoke picture framers which could explain why, with a population of over 290,000 in Hartlepool, there are only two picture framers, both in town centre locations near to each other. However, the average salary in Hartlepool at just over £30,000 is not substantially lower than the highest in the North East at just under £36,000 (Newcastle), so why the difference in quantity of framers? Could it be that the higher earners that live in the Hartlepool area, work and shop outside of the area?

So little correlation appears to exist between levels of unemployment or wealth and the number of picture framing businesses in an area. However, Supplier 5 did state that 'affluence affects spending' and that they are seeing a greater return on customers in the south of the UK than they are in the north, possibly reflecting the North/South Divide in terms of disposable income levels, with the ONS reporting that the average in London, which is the highest in the UK, being almost twice that of the North East, which is the lowest average in 2018 (*What are the regional differences in income and productivity?*, 2021).

When considering the geography of an area, you need to consider the economic growth of that area. GDP for the North East had a 0.8% growth rate for the second quarter of 2019 (*GDP, North East - Office for National Statistics*, 2020) which was a considerable fall from quarter one. With the onset of Covid 19 in 2020, these figures worsened with the North East showing a quarter-on-quarter GDP figure of minus 2.7% for quarter one (Image 7).

Image 7 – Growth by region in Quarter 1 (JAN to Mar) 2020

Source: Office for National Statistics – Regional GDP estimate

Nationally, the North East Times reported that the UK has seen a record fall in GDP of 20.4% during the second quarter of 2020 as the country went into two months of lockdown and which was then followed by record growth, for a quarter, of 15.5% (Dawson, 2020) in the third quarter as people emerged from their homes, many still on furlough, but looking to spend money. This growth then showed signs of slowing again into the third quarter, with the North East being the first to feel it as they were put into a regional lockdown in September 2020 and was followed up by another national lockdown in November, so quarter four was not expected to be very good either.

According to Oxford Economics (*Coronavirus UK economic outlook: differences across regions*, 2020), the North East had the third worst rate of gross value added (GVA) in the UK during 2020 at minus 8.3%, and were predicting the lowest level of GVA growth in England in 2021. They were also predicting that the North East would have the slowest rate of economic growth between 2020-25, which will have a negative impact on the unemployment rate due to its traditionally 'high dependency on both manufacturing and the public sector' and its 'relatively weak base in terms of small entrepreneurial businesses'.

Continuing migration of the workforce will likely be inevitable, bringing with it another problem for the North East as highly skilled workers will also leave. These highly skilled workers are the ones that receive higher levels of pay and is one of the main target markets for picture framers, which may mean the continuing fall in numbers of framing businesses in the region. According to the ONS 'The North East is the region with the slowest projected population growth, 2.3% (61,000) by mid-2028' (Nash, 2020), which also fits in with what Oxford Economics have predicted in terms of migration out of the North East.

1.5 - Picturing the framing trade

Most people know exactly what a picture frame is due to the amount of them that surround us all in our homes. They are used to show off pieces of treasured artwork, sports memorabilia, vinyl records, in fact a whole range of items that people require to be hung on their wall or placed on mantlepieces in their homes or workplaces. But how are these pieces of furniture made and by what type of business?

Originally, wooden picture frames were 'an integral part of the structure of panel paintings' (Allan, 2016) with frames often being as decorative as the artwork, and sometimes actually being made by the artist themselves. These highly decorative pieces were often found in religious establishments adorning alters and usually depicting a religious scene (Image 8). Evidence has also been found in Egypt of frames dating from 50-70 AD being around Fayum Mummy Portraits that were used during the funerary procedures. Killingworth (2019) states that the concept of a picture frame can be traced as far back as the Babylonians in that a plaster frame was often placed around a painted mural or mosaic.

The modern picture frame as we know it – an independent, carved piece of wood, or four pieces joined together at the corners which is known as an engaged frame, began to appear in Italy sometime in the 15th Century. Artists such as Sandro Boticelli (1445-1510) would commission other artists such as sculptors to create beautifully ornate frames from local wood (which was sometimes gilded) that would help draw the viewing eye to the art. Wealthy families such as the Medici's wanted portable frames so that they could transport their precious art around their estates, something that the religious pieces weren't. Sadly, few of these original frames, which were also unique pieces of art, have survived into the 21st Century as successive owners have changed them to fit into the trends and fashions of their time.

Image 8: *Segna di Buonaventura | Saint John the Evangelist*, c.1320 (metmuseum.org, no date)

Picture frame mouldings, which are manufactured from different materials to a given pattern, began to appear during the Industrial Revolution in the 19th Century, with furniture manufacturers using their offcuts to make picture moulding. By the end of the 19th Century, woodworking and furniture manufacturers such as Ashworth, Kirk & Company Limited (Ltd) were also making picture frames in dedicated departments using skilled and semi-skilled workers to produce bespoke and mass-produced frames (Image 9).

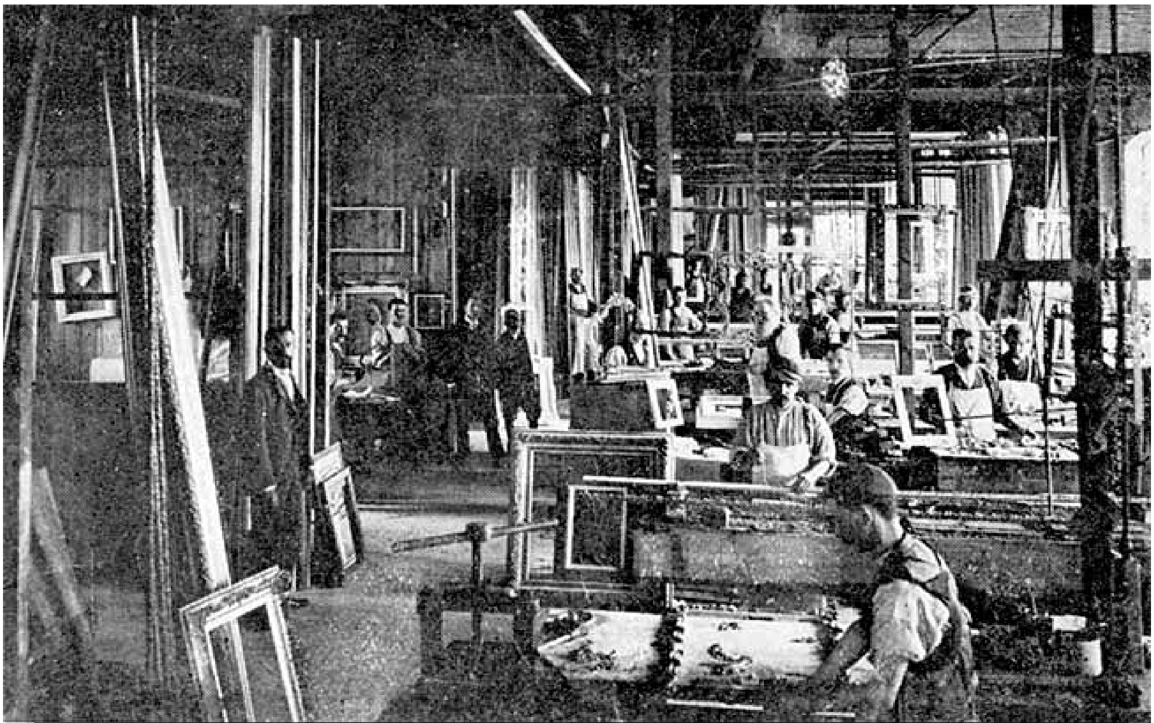


Image 9: Picture frame moulding department at Ashworth, Kirk & Co Ltd. Circa 1898

Source: Nottingham & Notts Illustrated, 2015

At the time of writing, Ashworth & Thompson Ltd were the oldest surviving supplier of picture frame moulding in the UK, having been trading for over 90 years, although the company's heritage can be traced back indirectly to the 19th Century under the name of Ashworth, Kirk & Co Ltd, which was founded in 1849 in Nottingham (Nicholson, 2015).

In 21st Century Britain, the picture framing trade is dominated by SMEs that carry out the following tasks.

- Producing bespoke frames from either mass produced wooden or plastic moulding that is purchased from wholesale suppliers or directly from manufacturers abroad. A few picture framers still make their own from raw timber.
- Specialist picture frame makers that supply the likes of the leisure industry and work closely with designers of bars and hotel interiors, again purchasing either from wholesale suppliers or the manufacturers themselves.
- Mass producers of photo frames in standard sizes who can often go direct to manufacturers as well as to wholesale suppliers due to the amount of moulding, mountboard, etc that they purchase. According to Steve Burke, formally of Larson Juhl, these types of businesses have decreased in numbers in the UK or diversified in recent years, as most of the mass-produced photo frames available in the big box stores such as B&Q or B&M are now made in Asia and framers in the United Kingdom (UK) find it difficult to compete on price.
- Wholesale suppliers and manufacturers.

Bespoke picture framing can be considered as a cottage industry which can be defined as an industry that:

> *is a small-scale, decentralized manufacturing business often operated out of a home rather than a purpose-built facility. Cottage industries are defined by the amount of investment required to start, as well as the number of people employed. They often focus on the production of labor-intensive goods but face a significant disadvantage when competing with factory-based manufacturers that mass-produce goods* (Kenton, 2020a).

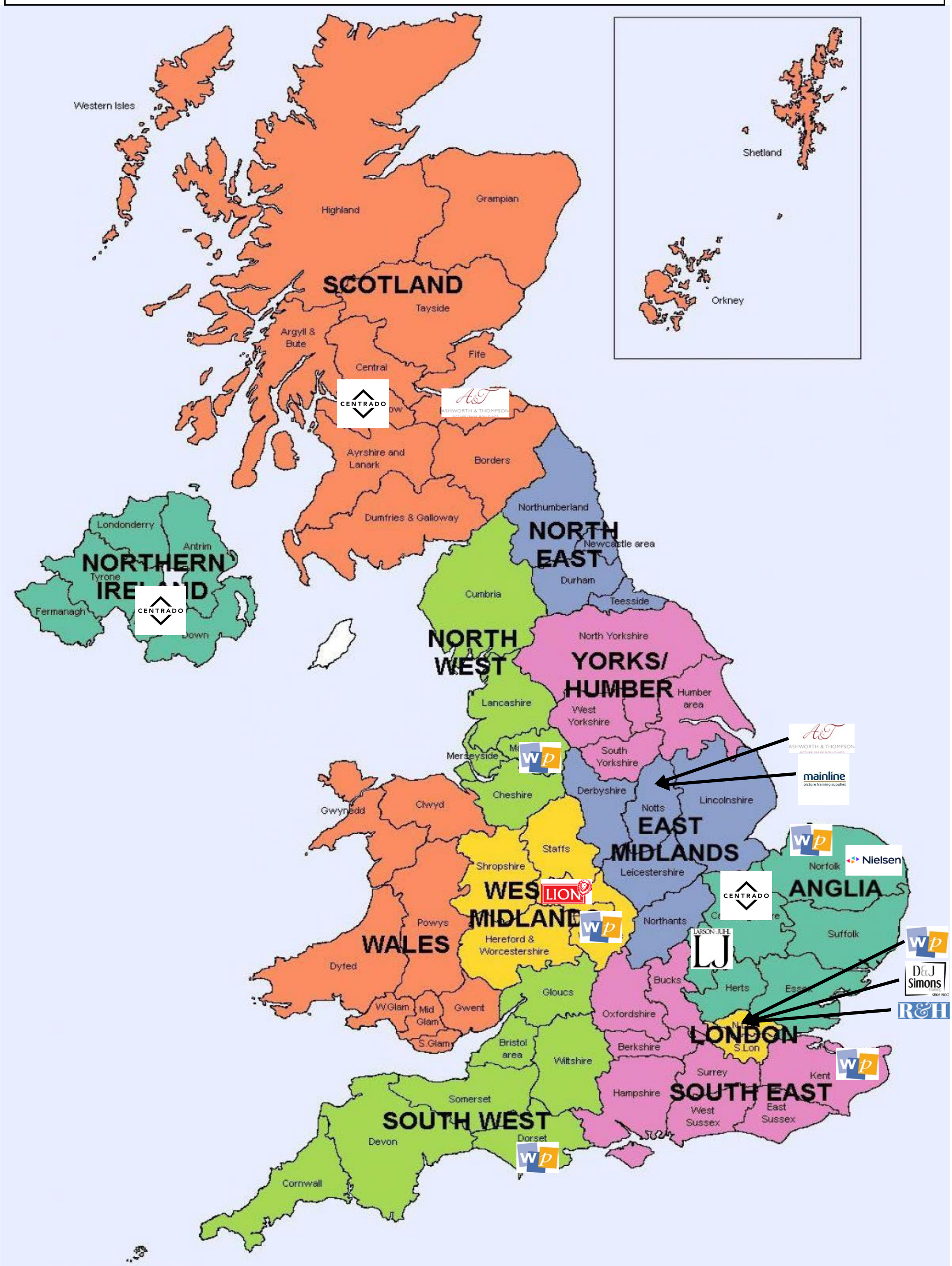
These cottage industry businesses are operated by main street entrepreneurs (Doody, Chen & Goldstein (2016), who are owners of micro and small businesses primarily focused on supporting themselves, such as artisans or family businesses. They are the traditional notion of what a small or micro business is.

When considering the suppliers of picture framing materials and equipment, it's important to think of them in two aspects.

1. The wholesale suppliers that have a base in the UK and supply the lengths of moulding, sheets of mountboard, glass, equipment and other sundry items to the businesses that make picture frames.
2. The actual manufacturers of these items.

The main wholesalers based on the researchers and Supplier 1's experience are (see Image 10 for locations):

Image 10 - Location of the main wholesale suppliers of picture framing supplies in the UK



- Larson Juhl, who are a public limited company (plc) and who are recognized as the largest wholesale supplier in the UK. They are a multinational company with their Head Office in the USA and who operate in 14 countries including moulding manufacturing factories (*Larson-Juhl | LinkedIn*, no date a).
- Ashworth & Thompson Ltd, who used to manufacture moulding but are now purely a wholesaler from two locations.
- Wessex Pictures Ltd and who run from six wholesale sites across mainland UK.
- Mainline Mouldings Ltd, who also own the Polcore brand name for plastic moulding.
- Lion Picture Framing Supplies Ltd.
- D & J Simons Ltd who originally created plastic mouldings under the name of Emafyl.
- Centrado Trading Ltd which has three branches in the UK and one in Germany.
- Rose & Hollis Ltd, who are much smaller than the other wholesalers but are known for supplying high quality plain wood mouldings.
- Nielson Ltd are the leaders in aluminium frames but also supply a range of wood mouldings.

There are other smaller wholesalers elsewhere in the UK that usually serve their immediate areas and often buy all or part of their stock from the main wholesalers.

Most picture framers do not have the luxury of being able to source their materials locally so have to rely on these wholesale suppliers. Those framers that live close to the wholesalers' bases do have the opportunity to go to the wholesalers in person to view the stock and samples, whereas most framers are reliant on the national network of carriers to get their stock delivered. Fortunately, the UK is well serviced by these carrier companies.

Suppliers used to use the Spring Fair at the Northern Exhibition Centre (NEC), Birmingham, which occurs every year in February, to launch new product lines as it was the biggest gathering of the trade in the UK – it was the main focal point with regard to launching new products for all suppliers to the picture framing trade. However, dwindling numbers of suppliers at the Spring Fair over the last 15 years or so – no picture framing suppliers and only one print publisher in 2023 (*Exhibitors*, Spring Fair, 2022), has led to few framers visiting the event, thereby creating a downward trend of supplier attendance. This fall in attendance has been blamed on the increased use of the internet for marketing. Sales representatives were also employed to visit picture framers to collect orders and let them know of any further new products, but their use has also reduced in the last 10 years.

This change in marketing focus by the framing suppliers also coincided with a reduction in the number of fine art print houses, as artists have gained access to excellent quality printers of their own. This has led to artists setting up their own websites and promoting their own work online, thereby cutting out the commission payments to the print houses and reducing further the number of exhibitors at the Spring Fair.

Picture moulding is manufactured in a variety of countries but in the UK is generally sourced from:

- Europe - Italy, Spain, Czech Republic and a few other Eastern European countries.
- Asia - China, Vietnam, Malaysia.

UK mountboard manufacturers include Larson Juhl, Daler Rowney or Crescent, whilst equipment is manufactured by the likes of Morsø (Denmark), Cassese (France), Fletcher Terry (USA), Keen Cut (UK), Gunnar (Switzerland) or Valiani (Italy) – some of these equipment manufacturers deal directly with the end users (e.g. Gunnar via a UK base), whilst others prefer to sell through a third party organisation that is already supplying other items to the trade (e.g. Valiani through Mainline Mouldings Ltd).

Picture framing falls within the home furnishings sector which has seen an increase in sales value over the last decade, from £10.8 billion to £13.6 billion by 2019 as reported by Statista.com (van Geldger, 2020), with a sharp fall in value in 2020 due to the Covid 19 pandemic. However, they did expect the market to recover by 2022. According to a Mordor Intelligence report (*United Kingdom Home Decor Market | Growth, Trends, and Forecasts (2020 - 2025)*, no date), the home décor market has shown a far higher growth rate than other home retail markets.

However, the problem with valuing the picture framing trade is that no one knows the sales figures for framing due to it being very much a cottage industry, dominated by SME businesses that it's hard to get true sales figures from. The same problem applies to the wholesale sector of the trade as only Larson Juhl's sales figures are available via their published accounts as they are the only one listed as a plc. Yes, they are acknowledged as the largest wholesaler in the UK, but by how much? Not even they know!

Who are the consumers that the picture framing trade cater to?

Based on the researchers experience, picture framing consumers can be divided up into four distinct categories. No figures are available as further research would be needed.

1. Those that wish to have something framed but didn't know the cost as they've never had anything framed and therefore either accept the price and place an order, or change their minds due to perceived cost.
2. Those that know or suspect that bespoke framing is expensive so buy readymade frames from outlets such as Ikea.
3. Those that want the quality and choice of bespoke framing but are very cost conscious.
4. Those that are going to have their work framed the way they want it, regardless of the price.

Bespoke picture framers are very wary of the first category as they never know which way the customer will go – many framers will tell you about customers with whom they've spent a lot of time designing their frame package, only to find that it's way above the price that the customer expected or are willing to pay. Framers will often try and pick up a vibe during conversation regarding cost and so will try to find out if cost is the biggest buying element.

The second category is of little interest to bespoke framers as these people are usually buying on a tight budget and will make a picture 'fit' a readymade frame, although by making it fit, they do often need a new mount cutting so a small amount of business can be garnered in this way. However, many bespoke framers do also make readymade frames out of left over moulding or discontinued lines, so they don't ignore this market altogether. But they still find it difficult to compete on price with frames made in the likes of China and sold through big box stores.

The third category is important as a lot of jobs are done using cost effective mouldings such as painted blacks or whites, or in oak or pine. These frames can vary vastly in size and can make up a large percentage of a bespoke framer's orders.

The fourth category is loved by framers as it allows them to get creative in the design process. These types of customers are happy to have whatever makes their picture work regardless of cost.

Why was the picture framing trade chosen?

The researcher has an active interest in the trade, having family connections to the trade since the 1980's and earning his living in it through most of the 1990's and again from 2017. This active interest in the trade has led the researcher to examine what barriers to growth exist for picture framing businesses and whether these barriers are self-imposed or easily negotiated?

This interest in the trade academically dates back to the researchers honours degree in 1997 where his dissertation was also based on the picture framing trade. Within the intervening years, the industry has seen some large structural changes which, along with his experience of running his own picture framing business, led the researcher to wonder why picture framing businesses didn't often grow, and was there a future for them in terms of earning a living wage.

1.6 - Delimitations of scope, key assumptions and their justifications

The North East is a recognised geographical region within England which was chosen due its low rate of entrepreneurial start-ups (*Business population estimates for the UK and regions 2020: statistical release (HTML)*, 2020) when compared to other regions of England and the UK in general. It possesses a good mix of rural and urban areas on which to build a case study based on the ability of micro businesses – picture framers in this case, to grow if they wish.

Picture framing is a trade which has seen a decline in the number of businesses operating throughout the whole of the UK as well as in other developed countries. It has seen a decline in numbers in the North East by over 25% since 1997 when the researcher last examined the trade (Redfern, 1997). An assumption has been made that this decline is not wholly contributable to a fall in demand for picture framing per se, but rather the effect of greater competition from big box stores such as Ikea or The Range, where consumers can purchase a readymade picture frame for a fraction of the price of a custom made one as well as throwaway art, with or without a frame.

To be able to focus on micro businesses, the research was limited in terms of the type of picture framing business to those that offered a bespoke service in the main, thus excluding art galleries and photography shops. This would ensure that any future research in other regions of the UK could be easily and accurately compared to that carried out in the North East.

1.7 - Aims of the research

From the outset of this thesis, the researcher has had an active interest in researching why low-tech businesses, especially picture framers as this is the trade that he's been involved with for over 30 years, did not seem to grow in any obvious way. This is despite picture framing providing a healthy mark-up on goods produced.

During the research of a large range of relevant journal articles pertaining to the growth barriers faced by MSMEs, it became clear that research results into SMEs was very fractured in terms of thematic results, whilst research into micro businesses was very sparse therefore confirming the research of Gherhes et al (2020). This has left large gaps in academic knowledge across all the main themes highlighted by other authors.

The literature review helped to clarify the research direction, which will be to investigate a single industry – picture framing, which is primarily operated as micro businesses by OMEs, and within a low-tech environment. It is an industry that the author knows well having been involved in the trade on and off since 1989 and therefore has an active interest in the research. This focus on the picture framing trade will also allow for further research in future within other creative industries such as photographers or artists, as well as opening the door to comparisons against other micro industries not associated with the creative industries.

The research will focus on OMEs operating in the North East of England as it is the region with the lowest number of SMEs as a percentage of the population in the whole of the UK. No such research findings regarding micro businesses in the North East could be found, therefore identifying a large gap in academic knowledge pertaining to the region.

With regards to formal business planning, authors such as Fatoki (2016) established that rather than planning formally, micro businesses constantly scan the business environment, making changes quickly when required. Several other authors also found that MSMEs only plan formally when they are required to, such as to raise finance. However, with no academic research into whether micro businesses in the North East carry out any formal planning, this led to the first of the research aims being established.

With regards to the drivers for growth, authors such as Peren (1999) or Cassar (2006) have put ideas forward regarding the requirements of both the OME's individual characteristics and the business environment for success when it comes to growth. However, the focus has primarily been on SMEs and very little research has been done anywhere in the world on micro businesses – the exception to this is the work of Clark & Douglas (2010) and (2014) in New Zealand. This led to the beginnings of the second aim in this research thesis.

When it comes to the barriers to growth, research into micro businesses has been carried out by the likes of Gray (2002) and Soloman & Tathias (2020), but the focus has still primarily been on SMEs as opposed to micro businesses. Additionally, very little research has been conducted on a particular industry, and none in the North East. Therefore, this led to the completion of the second aim in the research thesis.

All businesses require support and advice at some point in their existence. But is the support for MSMEs in place, and is it effective? This is an area that has been researched in various countries over the last 25 years or more, with the likes of Lean (1998) arguing that there was a lack of UK Government support for micro businesses. Arguments stating that this form of support should be more targeted have been put forward by several authors following studies in the UK, Ireland, USA, Canada and Sweden. However, is this a more expensive way to provide support rather than a one system fits all approach? This dilemma regarding business support led to the third aim of the research, as the researcher was interested in finding out if OMEs had sought any advice and if so, what form it may have taken.

Many researchers have tackled the issue of financing SMEs, especially following the economic crash of 2008. But the focus is again on SMEs, not micro businesses, with Masiak *et al* (2019) being one of the few pieces of research to tackle this issue. Therefore, the fourth aim of the research was established.

Smallbone *et al* (1995) and other researchers have identified the link between innovative SMEs and growth, whilst the likes of Hervas-Oliver *et al* (2021) pointed out that innovation occurs in all areas of a business's operation – it's not just technology based. But are picture framing businesses, who are essentially low-tech in their approach, innovative in any way?

Technology has aided the ability of SMEs to compete internationally (Herve *et al,* 2020) as well as allowing them to network (Tormo & Storhammer, 2019) easily but again, are micro businesses such as picture framers taking advantage of this technology or are they still reliant on word-of-mouth, just as Townsend *et al* (2016) found in Scotland? These gaps in the knowledge base, especially in the North East, led to the fifth aim.

Finally, based on the authors' experience within the picture framing trade, the sixth aim of the research was to establish whether the picture framing trade in the North East will continue to decline in numbers and, if so, what the future of the trade might be. The findings to this point may also point the way forward for other similar industries and businesses in the region.

In summary, the aims of this research are:

1. How do micro business OMEs in the North East of England plan for business development?
2. To what extent are micro business OMEs in the North East of England growth orientated?

3. Do micro business OMEs in the North East of England access and benefit from business support agencies?
4. Are North East micro business OMEs accessing external funding sources to help with business development?
5. How do North East micro business OMEs innovate their operations?
6. How are micro businesses in the North East of England positioned to meet future challenges?

These six aims will help to answer the research question

Is there a future for low tech micro businesses such as picture framers in the North East of England?

1.8 - Conclusion

Within Chapter 1 the foundations for this thesis have been laid out, namely the growing acceptance of the importance of MSMEs within the UK economy; the current state of the UK economy in which all MSMEs have to operate; the historical position of North East England and its position within the UK economy; and a potted history of the picture framing trade along with the current situation regarding UK suppliers.

The main research question as well as the main aims of the thesis have been positioned within this chapter, along with the reasons for choosing the aims. The limitations of the report have also been acknowledged.

With these topics in place, the thesis can continue with an in-depth analysis of the research done to date by other authors on MSMEs. This will include research carried out within the North East of England as well as the UK in general, and internationally in mainly developed economies, but also some developing economies where it is relevant.

This literature review will help to build a record of the main research aspects already undertaken pertaining to the aims of this research. It will provide evidence of prior research into relevant areas as well as helping to identify any gaps in academic research.

Chapter 2 - Literature Review

In Chapter 1, the basic problem that this thesis is seeking to answer was laid out - that of why micro businesses, in this case picture framing businesses, fail to grow substantially beyond single outlet operations in the North East of England.

For this literature review, research was carried out primarily using the University of Sunderland library services online search tool as Covid 19 restrictions were still in place at the time. Search criteria was initially limited to academic journal articles published in English speaking journals such as Emerald, Science Direct and Elsevier. Initially, the search only went back to 2010 but was widened when it became evident that there was so little academic sources available that focused on micro businesses. Due to the shortage of articles pertaining to micro businesses in the UK, academic articles pertaining to MSMEs in economically developed countries were also used and, where appropriate, from developing countries too.

Other sources such as Google Scholar and Research Gate were also utilised when carrying out the literature review, as was the British Library.

As the literature review progressed, it became obvious that the best approach to recording the source data was to use a themed approach that would point the way to the research questions. The main themes found were;

- drivers and barriers to growth,
- business planning,
- small business support,
- financing growth,
- innovation, new technologies and networking.

An overview of the research findings into SMEs is provided first as this provides the big picture regarding the findings into these themed areas. It also provides the greatest number of articles on which to build knowledge. The research findings into micro businesses is then provided so as to give a focal point on which the rest of the thesis can be built.

For non-academic sources, I was able to use Google to find relevant newspaper articles from the local North East press, or statistics from the likes of the ONS, whilst industry specific sources were found using 4walls and Art + Framing Today trade magazines online. Personal connections within the trade were also used to build up a picture of the trade.

Chapter 2.1 looks at the research conducted into how and if SMEs plan for growth and whether the existing planning tools are useful, particularly in the face of the use of adaptive planning techniques, which is also examined.

Chapter 2.2 examines the drivers for growth amongst SMEs. This includes the impact that modern technologies may have on micro businesses, particularly fast growing versus slow growing ones. It then goes on to look at the research undertaken as to what stops growth in SMEs, including self-imposed barriers, and concludes with the research into why small businesses fail.

Chapter 2.3 examines what business support has been found to be available to SMEs whilst also discussing its suitability to all parties. There's also an analysis concerning the use of public funds to support SMEs and whether it's an effective use of public finances.

Chapter 2.4 looks at the issue of raising finance as an SME. The chapter considers whether credit ratings affect OMEs decisions on whether to borrow money or not, as well as how governments and other agencies have attempted to encourage lending. The chapter concludes with a look at alternative sources of funding other than banks, and their usefulness to SMEs.

In Chapter 2.5, the link between innovation and growth is examined including an analysis of how modern technology is affecting networking amongst SME owners, a topic which is itself then examined.

Chapter 2.6 then examines the research undertaken on the same themes as above, but from the point of view of micro businesses. The research into this area found substantially fewer articles on each theme, which allowed for the identification of gaps in academic knowledge.

Chapter 2 concludes with a summary of the chapter.

2.1 – Planning for growth in SMEs (or not?)

With the onset of mass production techniques that were being pioneered by the likes of Henry Ford in the early part of the 20th century, researchers such as Elton Mayo, who undertook his Hawthorne experiment in 1924, was keen to understand the impact of managerial decisions on the performance of companies. However, at that point they were more concerned about increased production rates rather than the actual workings of management decisions.

Strategic management as an independent subject began to get recognised in the 1960's due to the work of Alfred D. Chandler (1962) and Harry I. Ansoff (1965) with, according to Edwards (2014), 1980 being the 'pivotal' year with the creation of the Strategic Management Journal and the publication of Professor Michael Porter's seminal book, Competitive Strategy: Techniques for Analyzing Industries and Competitors, which introduced his ground-breaking 5 Forces Model.

The subject of strategic management has been constantly re-visited and re-visualised ever since with the likes of Hoskisson *et al* (1999) highlighting the move away from the 'best practice' model towards one that analyses a wide range of topics such as industrialisation, strategic leadership and corporate social responsibility (Guerras-Martín, Madhok and Montoro-Sánchez, 2014a). There has also been a growth in the types of research methods used, with in-depth case studies being accompanied by econometric techniques, multi-level analysis and hybrid methodologies.

Strategic planning is an important part of strategic management, with the Hartford stating that 'Strategic planning is the process of documenting and establishing a direction of your …

business—by assessing both where you are and where you're going' (Vo, 2018) or, in the words of Kling (2018), 'the approach used in forming an organization's direction (e.g., its vision, mission and priorities)'. Many other authors have also defined what they believe to be the definition of strategic planning, but in essence it all boils down to an examination of the business environment that a company or industry are operating in now, based on various aspects, and how the OMEs want to move the business forward in future, based on the current and forecasted future business environment and 'can quite often be found in a business' mission statement' (Kling, 2018). This approach is often driven by the founder or owner of a business, but in large organisations it can be the result of several people's ideas brought together to form one cohesive plan.

With a dearth of research being carried out by academics into the ways that large companies use and adapt different strategic management models, researchers began in earnest, during the 1980's, to examine the effects of strategic management on SMEs, an area which had previously been pretty much ignored. However, as the demands of different sizes of SMEs became more apparent, so did a realisation that micro businesses were being totally ignored due to the lack of data available on them, and the difficulty in obtaining said data.

Bellamy *et al* (2019) highlighted the problem of limited use of planning tools by SMEs in their examination of nine SMEs from the same region of the UK. Although they did find some limited use of strategic management techniques, it was rarely through design. Their findings highlighted the short-term focus that many SMEs are seen to have, that of survival due to limited resources, which can lead to the pursuit of organic growth (Brush *et al*, 2009). Similar results were found by Forth & Bryson (2019) into management practice use by SMEs, although they also found that of the SMEs that used formal management practices, there were 'demonstrable benefits' in terms of 'survival, growth and productivity'.

Greenbank (2000a) found that only 20% of OMEs prepared a business plan on start-up, which was mainly for the use of other interested parties such as banks or support agencies. They also found that only 30% of these OMEs, in general the larger businesses, continued to plan after start-up, which suggests that not all SMEs share the same thinking when it comes to planning (backed up by Bellamy *et al*, 2019). O'Dwyer & Ryan's (2000) findings on business planning were a little more positive with 50% of their respondents saying that they had a business plan at start up. However, attitudes towards planning varied between it being seen as an important process for future planning through to doing it to gain finance - a cosmetic practice which backs up Greenbank's (2000a) findings.

LeBrasseur *et al*, 2003 (cited in Gherhes et al, 2016) found that 84% of the businesses in their research carried out business planning which contradicts both Greenbank (2000a) and, to a lesser extent, O'Dwyer & Ryan (2000), and that there was a positive relationship between these planning activities, planned growth and actual growth. However, they also stated that there was a risk that these OMEs could get too involved in the day-to-day activities of the business, and spend less time managing it, therefore potentially reducing the overall performance and growth potential (backed up by Muller *et al*, 2012, cited in Gherhes *et al*, 2016).

2.1.1 - Adaptive planning (or planning on the hoof)

Bianchi *et al* (2018) didn't agree that small and micro businesses fail to plan. They argued that the use of lean dynamic performance management systems allows small and micro businesses to manage small, often invisible, incremental changes better by identifying key performance indicators and utilising the entrepreneur's tacit knowledge, whilst at the same time restraining 'their emotional spirit', thereby helping to alleviate the problem identified by LeBrasseur *et al* (2003).

Hauser *et al* (2020) investigated the use of strategic decision-making tools amongst Swiss SMEs, finding that rather than SMEs simply not using strategy tools, they utilise an effectuation strategy that allows them to make and change decisions rapidly, depending on the needs of the situation at any given point which backs up the findings of Bianchi *et al* (2018). This ad hoc use of planning tools links directly to the work of Faherty and Stephens (2016) and Crovini, Ossola and Britzelmaier (2021). The former study found that amongst the small businesses that they researched in Ireland, only a minority of them used 'monthly management accounting systems', whilst the authors of the latter study state that;

> *the findings underline that RM* (Risk Management) *in SMEs is still a 'spot' subject as they put little effort into the risk identification, assessment and monitoring. The lack of procedures and strategies is due to the lack of risk mindfulness and knowledge, and it is related to the managers' and owners' risk attitudes.*

Sandada's (2015) findings regarding the importance of planning in SMEs in South Africa showed that employee participation in the strategic planning process (also see Elbana, 2008), environmental scanning (also see Jorosi, 2008) and the business mission and vision (also see Mazzarol *et al*, 2009) were crucial in that SMEs 'will be able to assess their environment, adjust their strategies, cushion themselves from the dynamic environment, and hence improve their performance.' However, there is no specific mention of micro businesses in their report, again demonstrating the problem of micro businesses being included in the SME definition, especially as many micro businesses have few, if any, employees to include.

Agility and flexibility has been studied over a 10-year period by Honig & Samuelsson (2021) regarding the usefulness of planning during a time when the environment is rapidly changing. They found that the use of the accepted business plan did little to help established businesses that changed slowly other than to help raise finance, whilst fast changing dynamic businesses found that the standard business plan was too slow and cumbersome to be of any use – they found that long term planning was of no use as the environment was changing so rapidly, backing up O'Dwyer & Ryan's (2000) findings, and bringing the argument all the way back around to Bianchi *et al* (2018).

Even though there are now new approaches to business planning such as 'the lean start-up, design thinking, the business model canvas, and other emergent approaches' (Honig and Samuelsson, 2021a), there is still a strong scholarly and pedagogical commitment to business planning (Katz, 2018, cited in Honig & Samuelsson, 2021), whilst Li (2017) found that many creative businesses now used a variety of business plans for different purposes and at different times which backs up Baden-Fuller & Morgan's (2010) suggestion that a business model is like a recipe in which different businesses will take different elements of successful business plan templates and then mix them up to create their own type of business plan. These views are all backed up by Cosenz & Bivona (2019), whose examination of a dynamic business model utilised by an SME, demonstrated the flexibility required by such businesses in their planning.

All this research into alternative methods adopted by MSMEs towards their planning does suggest that the rigid form of planning favoured by many is, as suggested by Katz (2018), of no use to MSMEs due to their requirement for flexibility and rapid change of direction. MSMEs do not have the resources nor the time to create complex planning strategies that may take several years to come to fruition - many simply want to survive one month to the next and therefore plan accordingly.

2.2 – The growth, stagnation and failure of MSMEs

Alongside the academic interest in strategic planning in the 1980's, the way that businesses grow, mature and decline became an area of interest as well. Academics were interested in finding out why and how different businesses went through these stages, with an increase in the amount of research being undertaken into SMEs since the turn of the 21st Century.

Drivers for growth in MSMEs

Peren (1999) identified four growth drivers for micro businesses;

- growth motivation,
- expertise in managing growth,
- resource access
- demand.

All four factors tend to 'mediate' with other independent factors. He also found that the desire to succeed doesn't always fit in with growth (cited in Gherhes *et al*, 2016). Morrison *et al* (2003) also adds that a balance is required between the OME's 'intention, business abilities and opportunity environment', the latter of which must be perceived positively.

Douglas (2013) agrees with Morrison *et al* (2003) when he argues that the growth of a start-up business is determined by the initial start-up intention, with independence orientated intentions being risk averse (negative association) but looking for work enjoyment and autonomy (positive association), whilst a growth orientated intention is driven by the entrepreneur's self-belief in his/her abilities (also noted by Prasastyoga *et al*, 2018) – possibly being financially driven. Ahmad & Arif (2014) backed up Douglas' (2013) findings in their research into hotel entrepreneurs in the United Arab Emirates. However, the stage that a business is in will often determine the amount and type of motivation that an entrepreneur has according to Akinboye, Collins and Morrish (2020), with older micro businesses less likely to grow (Squicciarini, 2017).

Braidford *et al* (2017) found that in their research into personal attitudes towards growth ambition in small businesses, that entrepreneurs who were 'growth-inclined' were willing to sacrifice short-term financial gain in favour of long-term growth, whilst 'growth-resistant' entrepreneurs found barriers permanent. Their findings implied that there are:

> *limits to the extent to which small business growth performance can be explained using conventional research techniques, since the way owners run their businesses is often not properly "informed" or necessarily "rational".*

The findings of Braidford *et al* (2017) seem to be backed up by research into 2000 Spanish manufacturing companies by Moreno-Menéndez & Casillas (2021) which found that sales growth was slower in family run businesses, but employment growth was higher in them, thus highlighting the problem of identifying what is meant by 'growth' in a business.

Cooper *et al* (1989), Barringer *et al* (2005) and Lofstorm *et al* (2014) identified three main factors in entrepreneurs starting larger, high entry barrier businesses:

- Higher levels of education – the higher the standard of education amongst Czech entrepreneurs, the lower the satisfaction with state involvement in the business environment (Virglerova *et al*, 2017).
- Managerial experience - a significant number of high growth OMEs have owned or been directors of more than one other business (Rosa & Scott, 1999 cited in Gherhes *et al*, 2016) and have a positive association with trying to increase sales and size (Cassar, 2006).
- Job experience.

OMEs with higher levels of education have also been found to expect lower financial gains (Cassar, 2006) whilst the same report also found that if a household has a higher income level, the business's growth is more likely to be positive, with Foroudi *et al* (2017) stating that,

> *better access to higher education, enables entrepreneurs to gain knowledge of design innovation. Such informed policies could lead to the growth of SMEs given that this kind of a firm represents a big part of the economy.*

Makhele & Barnard (2020) back up the importance of education when acquiring business acumen both before setting up a business venture and within the first five years of trading. However, Coad *et al* (2013) argue that the role that education takes in creating start-up growth is limited, and that its resources that allow a business to survive, and therefore grow, which in turn increases the chances of survival – as they state, 'growth is not a random walk'. However, Eklund (2020) argues that his findings reveal that having an educated workforce that is adaptable to change is a key factor in fast-growing SMEs alongside other intangible assets, thus suggesting that it's not always the sole efforts of the entrepreneurs that grow a business but rather an informed and cooperative workforce which aids the management.

Demand shocks were identified by Johnson *et al*, 1999 (cited in Gherhes *et al*, 2016) as potential catalysts for growth, with short-run constraints determining whether a business can grow rapidly or even downsize, with the OMEs educational ability, alongside that of the employees, determining the business's ability to overcome the constraints. However, Herbaine (2015) found that the age of the business rather than size, is the main determinant of how well a business can plan for events that threaten their survival. Bianchi *et al* (2018) disagree with both Johnson *et al* (1999) and Herbaine (2015) and argue that these shocks, or crises, rarely just happen – they are more likely to build up over time due to the management system in place. However, the argument put forward by Bianchi et al (2018) lost some of its credence due to the Corona virus pandemic which began in late 2019 and has had a negative impact on the financial statements of many small businesses (Hertati *et al*, 2020) – it was a black swan event that simply wasn't seen in advance.

Kidney, Harne and O'Gorman (2017) researched the factors triggering growth, or decline, of SMEs in Ireland, establishing that external factors such as 'regulatory regime and market changes, fluctuating economic conditions, and technological advancements' provided opportunities for internal or external diversification through product development and/or take overs, whilst the main internal factor was the hiring of key staff or a management buyout which professionalised the business. However, they did find that these trigger points occurred at different points in the business's life and growth was triggered at different points, confirming the ideas put forward by Brown and Mawson (2013) that 'trigger points are extremely diverse' and can cause disruption to a business' systems which, if not dealt with, can result in eventual business failure.

Corporate amnesia and the growth of knowledge

Corporate knowledge can be gained through experience whilst working for another organisation and which is then brought to the forefront by an entrepreneur in their own business, with Seddighi (2015) stating that 'knowledge accumulation' and 'technical change' are crucial for innovation. Crespo *et al* (2020) agree with this sentiment reporting that 'entrepreneurial capital, knowledge sharing collection, and absorptive capacity contribute to innovation'.

Hall & Raffaele (2013) introduce the idea of corporate amnesia, which is where the loss or absence of an individual from an organisation robs them of their knowledge base. This loss of knowledge isn't a major issue in a large organisation as the remaining staff can pool their knowledge to fill the gap, but in a micro business, every member of the organisation is a critical member, and the loss of that person can leave a large gap in knowledge. Therefore, why should OMEs give up control (knowledge) to staff who could then leave to join a competitor or set up a venture of their own? This leads to a large degree of self-efficacy (belief in one's own abilities) in micro businesses as found by Alonso *et al* (2019) in their study of Spanish and Greek micro businesses.

The idea of gathering knowledge and learning through experience was also examined by Dias & Martens (2017) who investigated business failure by three entrepreneurs and how they learnt from the failure, finding ways to overcome the barriers so that they could open new ventures. Thatcher *et al* (2016) were also interested in the build-up of knowledge and examined the acquisition of knowledge in MSEs, either through experience or blended learning, and its effect on business performance in terms of added value. Lafuente *et al* (2019) went as far as to state that 'practical experience is an essential prerequisite for entrepreneurial learning.'

However, research into Mexican MSMEs appears to question the idea of corporate knowledge altogether, as it has shown that although growth through employee numbers or sales may occur, it doesn't mean that there will be a greater accumulation of knowledge (López-Ortega *et al*, 2016).

With regard to legal regulations, a study into small and micro businesses views and usage of such regulations in North West England found that 'even very small businesses can use regulatory knowledge as a basis for business growth' (Peck, Jackson and Mulvey, 2018a), particularly if they're innovative businesses that need to either protect a product or gain competitive advantage through their understanding of the regulations. However, Betton *et al* (2019) found a large degree of hubris with regards to regulatory knowledge in the English accommodation sector, finding a large difference in entrepreneurs assumed knowledge and their actual knowledge, potentially eroding any competitive advantage that they may have had.

Does experience help growth?

Watson *et al* (1998) reported that managerial skills were the most important aspect amongst successful OMEs when compared against failing ones, whilst Moran, 1998 (cited in Gherhes *et al*, 2016) identified that high growth OMEs tend to adopt a 'learn by doing' philosophy and develop two key skills - strong leadership and the ability to thrive under pressure. Laguir & Beston (2016) backed these ideas up when they identified that work experience and motivation were the core elements of entrepreneurs that grew through innovation.

New businesses that grow through internationalisation of their services/products are found to grow faster 'due to their ability to adapt to new environments, learn fast and take advantage of broader markets' (Jung, Peña and Arias, 2012a), thus being able to come up with solutions that overcome barriers to growth. They also found that new ventures grow quickly when located in an area of similar types of business, thus benefitting from 'knowledge spill overs, cost reduction and market penetration.' Moen *et al* (2016) backed up the findings of Jung *et al* (2012) when they found that an international focus by SMEs encouraged growth both at home and abroad by the OMEs. However, Jung *et al's* (2012) study was limited in that they only investigated businesses with between 5 and 250 employees and therefore ignored the effect of the entrepreneurial factors at play in smaller micro businesses.

In the US, research into entrepreneurs in Maryland has revealed the increasing importance of 'grey' entrepreneurs as the baby boomers begin to retire and find that they haven't got adequate retirement packages and therefore need an extra income (Mattare, Monahan and Shah, 2010), usually in the same field that they have experience of. Cressy (1996) suggests that these 'grey' entrepreneurs are a factor in the longevity of micro businesses, with businesses set up by mature people more likely to survive for longer, whilst Yazdanfar & Ohman (2015) established that the age of the business was a factor in the speed of business growth amongst Swedish SMEs, with older businesses growing slower.

Simić, Slavković and Aleksić (2020) state that the entrepreneur is the 'key figure' in a small business and 'should possess certain personal predispositions, knowledge, skills and abilities', with Ekinci *et al* (2020) in full agreement when they state that entrepreneurs have four different identities - entrepreneurial, manager, personal, and social. Each one plays a key role at different times. Social awareness was also highlighted in the research of Tomasella & Ali (2019) who were looking at key factors to success in small food businesses in Sheffield, UK.

The work of Zhou and van der Zwan (2019) is of particular interest in relation to the work of Cressy (1996) and Yazdanfar & Ohman (2015), as they argue their case for the development of a U shaped pattern for organic employment growth. Their theory suggests that slow growing businesses have less chance of business failure (exit) than fast growing ones, and that all businesses will ultimately have an exit point at some stage, depending on the industry that they're in, due to hitting an inflection point of some sort. But those fast-growing businesses will hit it quicker.

The role of new technology in growth

The use of Sustainable Orientated Innovation (SOI) practices amongst MSMEs in India was examined by Khurana *et al* (2020) and found that the most critical factors for effective SOI practices were 'top management support, Government initiatives and financial resources.' Amongst Italian manufacturing SMEs it was found that those businesses that 'pursue survival on the basis of tangible innovation are characterized by both dynamic assets (skills, strategies and stakeholder) and networking strategies', whilst 'SMEs that do not own any dynamic assets pursue the creation of network collaboration with firms that have dynamic, tangible or intangible assets' (Vrontis *et al*, 2020).

Ballestar *et al* (2019) studied the use of robots in Spanish SMEs between 2008 and 2015, where they were able to make four main statements based on the findings:

1. *Robotic devices are associated with better performance, higher productivity and employment rates, as well as with a more knowledge-intensive value process.*
2. *In 2015, robotics accounted for a 5% increase of SME productivity level (2% in 2008).*

3. *Between 2008 and 2015, SME labour productivity models have progressively granted greater relevance to multi-factor productivity components (knowledge flows and the use of robotics) and human capital.*
4. *Robot use has generated new complementarity relationships among the explanatory factors of labour productivity.*

This research would suggest that SMEs need to invest in new technology to remain competitive in terms of performance growth, employment growth and knowledge growth. However, ElKhouly and Marwan (2015) identified age as an important factor in innovation - a term that some micro OMEs find frightening as it suggests expensive research and development (Faherty and Stephens, 2016a), finding that younger Egyptian entrepreneurs were more likely to embrace it than older ones were.

Peneder and Woerter (2014) found that the amount of research and development (R&D) undertaken is high when there is little competition, but that it decreases as competition grows. This focus on R&D was also raised by Nunes *et al* (2013) who identified a U-shaped pattern with regards to the speed of growth of SMEs in Portugal. They identified a positive association between high levels of growth in SMEs with high intensity R&D programmes, whilst a negative association was found between slow levels of growth and low intensity R&D. Their findings also commented on the traditionally slow rate of R&D in Portuguese businesses when compared to countries such as the USA or Japan, but it does raise the question of whether there is a correlation between their findings and the UK craft industries such as picture framing? More research into this area would be needed but is not part of the remit of this thesis as a greater emphasis across the whole of the UK would be needed to get the full picture.

Does gender or ethnicity affect the growth drivers of MSMEs?

A study of the motives of female entrepreneurs across 24 industrialised countries (Thébaud, 2015) found that women in general were less interested in an entrepreneurial venture than they were in financial support mechanisms such as maternity leave, subsidised childcare or paid leave. Thus, they tended to pursue a more 'traditional' type of job. Those women that found they couldn't get an 'institutionalised' type job would follow a 'Plan B' choice as an entrepreneur, often resulting in a smaller, slower growing venture. However, those 'women who do pursue entrepreneurship' as a Plan A 'are a select group motivated by a desire to build larger, more innovative organizations that will have a more substantial impact on the economy and job growth'.

The differing motives behind entrepreneurial ventures were investigated in a study of 24 European countries by Jafari-Sadeghi (2020), with men being found to be driven predominantly by opportunity seeking motivation whilst women were driven not just by opportunity, but also by necessity based and mixed motivation - a combination of necessity forcing a person to seek out opportunity. Both the research of Clark & Douglas (2014) and Jafari-Sadeghi (2020) point towards women opting for Plan B as suggested by Thébaud (2015).

With regards to success criteria, research carried out by Kirkwood (2016) in Egypt found that there is no difference between men and women, nor in their ability to innovate according to ElKhouly and Marwan (2015). ElKhouly & Marwan (2017) also found that the main 'drivers of strategic innovation' in Egypt were 'equality, prediction and positive work relationships.'

McPherson (2019) found in his research of second-generation ethnic entrepreneurs in London, that they had problems breaking out of their local customer base and therefore business growth tended to fall into one of three categories - content to remain, forced to remain or struggling to adjust, and that 'entrepreneurial intention, ability and opportunity' are the main factors that help to determine the growth (or not) of a business. These findings back up the earlier findings from Morrison *et al* (2003).

Pursuit of answers regarding gender and ethnicity

The study of gender differences amongst micro OMEs in an equal society such as the UK, is a large and complex study that is outside of the remit of this thesis. In the authors experience, there is a gender difference in terms of OMEs ownership within the picture framing trade, but again, it's a stand-alone study for future. The same goes for ethnic differences, as the results from different regions of the UK may throw up varying degrees of ethnic differences amongst OMEs.

2.2.1 - What stops growth?

Greenbank (2001) stated that growth can't always be defined in terms of expansion or employment, but rather it may be the entrepreneur's own choice to remain small to maintain what they set out to do in the first place. This idea was reinforced by De Souza and Seifert (2018) when they said that growth as defined in textbooks isn't always correct. So does this failure to plan for growth mean that a small business isn't successful? Not in the eyes of the owners according to research by Weber *et al* (2015).

Lutz, Klemp & Gerhard (2010) attempted to identify barriers to entry through the interviewing of several SMEs in The Netherlands, covering a variety of potential barriers as identified by several authors in previous years (Appendix 1). They found that there were barriers to entry in three main areas – 'capital, access to distribution channels and strategic action' (behaviour). These barriers to entry could stop entrepreneurial activity as growth routes are found to be blocked, or slow expansion down to such a point that its purpose is questionable. Additionally, Atkinson *et al* (2017) found that the business decisions made by female entrepreneurs in Wales were heavily influenced by them not being taken seriously, which then has a knock-on effect on the level of credibility as serious business people that they can attain. This can then affect the growth pattern of the business.

Barriers to growth for small businesses in Canada was investigated by Gill & Bigger (2012) who identified that 'financing, market challenges, and regulatory issues' were the main problems, issues that have been known about for some time in many countries. However, it does reinforce some of the findings of Lutz, Klemp & Gerhard (2010). To help with the problem of financing, Gill & Bigger (2012) suggest the use of lending such as that used by the Grameen Bank (Okpara & Winn, 2007, cited in Gill & Bigger, 2012) which doesn't require any collateral from poor people wishing to set up business. The Grameen Scotland Foundation was launched in early 2013 in Glasgow to help those in deprived areas of Scotland launch business ventures and emulate the success of the Grameen Bank in Bangladesh. With backing from Tesco Bank, the Grameen Bank, the Scottish Government and other business leaders such as Ann Gloag, the co-founder of Stagecoach (King, 2012a), it was hoped that this new form of lending to the UK would be able to be rolled out across the UK. However, the venture was closed in 2018, with debts of £300,000 (MacDonald, 2018a) which had accrued due to missed re-payments by the SMEs that it had supported financially.

In 'Strategies for Adopting Consumer-generated Media in Small-sized to Medium-sized Tourism Enterprises', Burgess *et al* (2015) establish the importance of using new technology as an additional method to gain business, but also highlighted its lack of use by SMEs, possibly due to a lack of skills or knowledge on how to make use of the technology. Again, this showed that entrepreneurs lack of skills when it comes to technology is restricting some of their potential marketing channels and therefore potential growth and/or competitiveness.

Lee (2014) identified the key differences in perceived obstacles to growth between fast growing SMEs and potentially fast-growing SMEs in the UK (Table 2), highlighting that potentially fast-growing SMEs don't seem to be concerned about regulation causing obstacles, unlike the research from Canada.

Table 2 – Obstacles to growth in fast moving SMEs

Source: Lee, Neil, 2014

Obstacles to growth in fast-growing SME's	Obstacles to growth in potentially fast-growing SME's
Recruitment	Economy
Skill shortages	Obtaining finance
Obtaining finance	Cash flow
Cash flow	Management skills
Management skills	
Finding suitable premises	

Clegg (2018) confirmed these findings when he established that 'a lack of people capability was perceived to be the most commonly reported growth-impeding constraint', a point also identified by Thompson *et al* (2013). Clegg (2018) went on to say that there was 'a combined lack of process competence', 'product and service innovation' and 'lack of skills in information technology automation' amongst SMEs, confirming the findings of Burges *et al* (2015).

Usai *et al* (2018) argue that entrepreneurs don't always see these as barriers but suggest that they are merely 'imperfections' within the RM process, asymmetric information in the knowledge management process and hold-up problems that, if unchecked can cause major problems with the innovation process but are worked around by entrepreneurs. However, Crovini, Ossola and Britzelmaier (2021) found that from the 48 articles on RM in SMEs that they reviewed, they established that SMEs put very little effort into 'risk identification, assessment and monitoring. The lack of procedures and strategies is due to the lack of risk mindfulness and knowledge, and it is related to the managers' and owners' risk attitudes.' These findings are somewhat at odds with those of Usai *et al* (2018).

Vargas-Hernández and Arreola-Enríquez (2017) looked to see if there was a link between the usage of Maslow's Hierarchy of Needs and the motivational levels of employees in small businesses in Mexico, but came to the conclusion that such methods didn't work in small businesses due to poor communication between staff at all levels and a lack of training or education, leading to poor usage of the equipment, all which created a high level of uncertainty, backing up the view of Johnson *et al* (1999). The research serves to highlight the issue of employing the correct staff, a problem already identified as a barrier to some micro-OMEs.

2.2.2 - Why do small businesses fail?

For Williams (2016), the answer to this question is simple – retained profit, or lack of, was the main reason for small high tech business closures. Garcia Martinez *et al* (2019) found that business investment into 'R&D human capital' was essential for businesses to survive the 2008 economic crises due to the increased 'competition requiring resources and capabilities to cope with turbulent market conditions.' This requirement for resources could be a major problem for small businesses that lack retained profit, backing up Williams (2016). It's worth mentioning here the work of *Holmes et al* (2010) whose study into new manufacturing firm survival in the North East of England found that micro enterprises on average, tended to survive longer than SME's and that micro enterprises were more likely to fail if pushed to grow rapidly.

In contrast to the idea of a lack of financial resources being the reason for small business failure, Williams (2017) found, by using a neural network to analyse the features that are most likely to cause a small business to fail, it wasn't resources that caused the failure, but rather 'age, governance structure, return on asset, revenues, firm size, net income and industry sector'. However, several of these aspects all need adequate resources to operate effectively, so falling back to the findings of Williams (2016).

Weaven *et al* (2021) examined the factors that helped to determine the success or failure of SMEs in Australia during an economic downturn and were able to confirm 'the importance of business owner characteristics and firm resources' for business survival, again backing up Williams (2016), whilst Maté-Sánchez-Val, López-Hernandez and Rodriguez Fuentes (2018) found during research into SMEs in Madrid that ‘Geographical proximity between firms, external economic agents and transport facilities has a determinant impact on business failure’, loosely backing up the findings of Williams (2017).

Makropoulos et al (2020) produced an in-depth report on the reasons behind the failure of 1000 UK SMEs between 2003 – 2013 and which backed up some of the findings of Williams (2017) in that:

> *Firms that are 22 years old with more than two directors with average age over 52.5 have deteriorating growth rates and high credit use.*
>
> *Firms that are 19 years old have more than two directors with an average age of 51.5 years have poor cash flows despite strong sales.*
>
> *Firms that are 19 years old with fewer than two directors with an average age of 50 years old have limited trade credit lines but worsening ability to generate cash flow and return on investment (ROI) but have increasing assets.*
>
> *Firms that are nine years old with more than two directors with an average age of 47 have large debts, an ability to generate cash flow but worsening liquidity positions, ROI and growth.*

The work of Yli-Renko *et al* (2020) showed that over reliance by a new business on a single customer often had a negative impact on the business’ survival as their customer can control areas such as ‘payment terms, duration and prices’ (Khosla, 2012a), as well as being affected by market fluctuations that could determine whether they are successful or not, therefore determining the destiny of the new business as well. Yli-Renko *et al* (2020) also showed in their research into high-tech UK businesses that experiential learning is critical for the young business but, if it does survive, then reliance on a single customer can become beneficial.

Within the retail sector, the arrival of the internet has changed the way people shop. A study in the USA found that ‘product parity is one of the major reasons for failure of businesses in today’s competitive retail arena’ (Byun *et al*, 2020) but that small retail businesses ‘should deliver unique products and experience by creating local connections with their customers which large or national brands will have difficulty building’. Surprisingly, they also found that over half of the small retail businesses that they interviewed felt optimistic about their future, mainly because they felt that they had good product differentiation or, in the case of rural businesses, a local monopoly. However, it is unknown as to how many small businesses were involved in the research.

Huggins (2011) raised an interesting point in his final statement of his research article entitled ‘The Growth of Knowledge-Intensive Business Services: Innovation, Markets and Networks’ and which could have a major impact on the success or failure of small businesses:

> *At the regional level, a further sign of the growing unpredictability resulting from economic shocks is the introduction in London of an economic recovery action plan to support the region’s knowledge-based sectors. This, along with national government intervention to support the banking sector, represents policy intervention on an exceptional scale. It also highlights the potential downside of globalization effects,*

whereby the systemic nature of international markets offers regions little in the way of insularity from economic problems elsewhere.

2.3 - Small business support

Mole (2000) found that advice was centred around survival as opposed to more risky growth strategies, but that it could be because businesses only tended to seek advice when they were in trouble and were trying to survive, whilst in Finland a system of small business advisors (SBAs) has been set up but, like Mole (2000) before them, were found by Laukkanen and Tornikoski (2018) to be risk averse in terms of the advice given to small businesses when it came to growth (Thorgren & Williams, 2020), and instead suggest the use of subsidised consultancy use. However, Robson & Bennett, 2000 (cited in Gherhes *et al*, 2016) found that there was no link between government backed agencies and business performance thereby to an extent eroding the suggestions that a lack of support for risky growth strategies was hindering growth. Rather, they purport the notion that more effective support comes from the private sector, particularly supplier relationships, in terms of employment and turnover growth whilst 'entrepreneurs' should 'receive a combination of personal and business support, especially during more uncertain, high-pressure, and complex times' (Ekinci, Gordon-Wilson and Slade, 2020a) as the growth of businesses severely challenges the identities of entrepreneurs.

Research in North West Wales into the support available for technology based start-ups found that entrepreneurs were accessing both 'direct and indirect' support including 'local and central government; help from banks and professionals; universities; technology incubation units, and; collaborations and networks' (Jones and Parry, 2011a). However, the issue of increased specialised guidance was highlighted as a requirement. The same issue of a requirement for specialised guidance also came to light during research in Dublin into support for hobby, artisan and entrepreneurial businesses, where it was found that more targeted support was required (thereby providing support for Faherty & Stephens, 2016), finding that targeted support from industry specialists for the artisans, who merely wanted to support themselves, and the entrepreneurs who were actively seeking to grow their businesses (Bouette and Magee, 2015a) would be more useful. They also suggested the use of peer networks to help support these types of businesses whilst also helping to limit the use of scarce financial resources.

Braidford, Stone & Tesfaye (2013) set out to examine whether women's support centres such as those set up in the USA, Canada and Sweden worked and could be rolled out in other countries but concluded that both women and men would be better off getting more targeted support, backing up the findings of Jones & Parry (2011) and Bouette & Magee (2015).

2.3.1 - But its taxpayers' money!

Research in Germany into the benefits of providing state subsidies to start-ups straight out of unemployment has revealed 'that formerly subsidized founders lag behind not only in survival and job creation, but especially in innovation activities' suggesting that the entrepreneurial characteristics of non-subsidised start-ups are better, and that 'the gaps in these business outcomes are relatively constant or even widening over time' (Caliendo, Künn and Weissenberger, 2020). They also found that one of the biggest issues facing subsidised start-ups is the continuing struggle to source finance for growth which severely limited business development and growth. However, Cowling *et al* (2020) contradict this research, as they found a positive link between the provision of local finance options in the UK and the generation of 'a positive local economic multiplier that extends beyond the funding period'. The findings from these two pieces of research throw up the question of whether SMEs in different countries, even if they are both developed economies, benefit in different ways to government funding. More research is needed in this area.

Research in the UK by Einiö and Overman (2020) on the effectiveness of targeted support in deprived areas appears to slightly contradict the findings of Cowling *et al* (2020) though, as it found that 'supporting the non-tradable sector may be a highly inefficient instrument for transferring jobs to disadvantaged areas', as the areas outside of the support saw a 10% drop in employment due to the re-shuffling effect caused by the support in neighbouring areas. It was also found that the effects were not long lasting.

Thorgren & Williams (2020) also provided their thoughts into this argument by stating that it's difficult for 'policymakers' to make decisions on support during black swan events as they don't know what effect they will have, nor how long the support will need to be in place. Their research into how SMEs in Sweden react to 'black swan' crises events resulted in the recommendation that governments act quickly to support SMEs, as in some cases they do not have enough working capital to survive a few weeks let alone a couple of months. They also raise the question of whether all SMEs should be supported equally or whether it's better to invest the support into industries that have been particularly hard hit, or will help to 'rebuild infrastructure, construction or energy'. The Covid 19 pandemic is a perfect example of a black swan event and has shown how quickly different governments around the world have been able to react to it, with the UK Government quickly providing financial support for MSMEs and the self-employed in most cases but having to constantly review the support as the pandemic developed and three lockdowns were ordered.

Research in Ecuador on Artificial Neural Networks by García Vidal *et al* (2017) may help to target support, as they have shown that it may be possible for business owners, Government departments or financial lenders to use a set of mathematical algorithms to determine whether a business is likely to grow in future, based on the performance of other similar businesses over a period of time. However, the authors also stated that their data sources were limited to publicly accessible databases and therefore had omitted to include 'many interesting cases and variables'.

Fiorentino (2017) explored the development of the Maker Movement which, from humble beginnings in The Bay area of San Francisco when a group of hobbyists set up a cluster of small manufacturing businesses together, has developed into a worldwide movement. Traditionally, cities and regional governments have simply copied and pasted past ideas into place to try and encourage regeneration by entrepreneurs, but Rome (along with other places around the world) has adopted the Maker Movements ideas and is trying to encourage the development of small innovative businesses within urban areas that have become run down due to the loss of their traditional use, including the use of trade fairs to highlight these businesses services to a wider audience. This is a very different approach to government support and will need further research in future to see if it is a successful way of supporting MSMEs.

2.4 - Financing growth in small businesses

Harrison and Baldock (2015) reported that following research by the World Bank on the aftermath of the 2008 financial crash, there has been an increased interest in the impact of SMEs on countries GDP. However, they also state that,

> *'based on a major cross-country comparison of SME access to finance this report also demonstrates that performance data shows that access to finance and the cost of credit not only pose barriers to SME financing but constrain small firms to a greater extent than large firms.'*

Cowling *et al* (2016) found that among the UK business population during the 2008 financial crises, only 2.7% were discouraged to borrow and of these, 55.6% would have been given the loans that they required had they applied.

Rostamkalaei (2017) argues that there is a mismatch in information between banks and borrowers which leads to good lenders being afraid to apply for loans in case they are rejected. His research into the aftermath of the 2008 recession revealed that although banks had quickly reverted to pre-recession loan application criteria, lenders were not aware of this and believed that they were still using the stricter measures brought in during the recession. This fear of borrowing led to less investment in new technology, leading to less innovativeness and thus competitiveness..

Research in the Netherlands showed that SMEs main source of finance for investment purposes during the 2008 financial crisis was still bank loans, it was simply the amount of investment that dropped (Zubair, Kabir and Huang, 2020a), whilst van der Zwan (2016) found that across 29 European countries, banks accepted loan applications more often from non-innovating SMEs than from those that were innovating, reinforcing the risk element highlighted by Cowling *et al* (2016).

Cowling, Liu & Zhang (2016) examined the availability of financing via banks after the 2008 financial crash and found that older, more established businesses were still able to access funding relatively easily, but smaller businesses with a high-risk rating or a record of 'delinquency' found it difficult to borrow. However, the amount of businesses refused credit was significantly lower at '42,000' as opposed to '119,000' during the crises. This change in the acceptance or willingness to apply for loans to invest didn't change the importance of lending when investing though. This is backed up by Imarhiagbe, Saridakis and Mohammed (2017) who ascertained 'that outright bank credit rejection reduces financial self-confidence among owner managers whereas partial bank credit rejection is found to help boost confidence prior to the financial crisis'

Kang *et al* (2019) researched the link between capital structure in SMEs in 10 European countries and performance, finding that it is driven by their 'credit risk status' – low credit risk SMEs should maintain a low debt ratio to improve performance, whilst Swedish SMEs were found to still be more reliant on retained profit for funding during and immediately after the 2008 financial crash and, if borrowing was required, then short-term finance was the preferred route (Öhman and Yazdanfar, 2017a).

Research in Spain into the amounts of cash held by SMEs revealed that many SMEs have a 'target cash holding level' which they require to feel confident about making any investments or dealing with a sudden cash flow crises, with fast-growing SMEs adjusting this target as they grow (Martínez-Sola, García-Teruel and Martínez-Solano, 2018a).

Cathcart *et al* (2020) suggest that it is the fault of government legislation that lending to SMEs is considered riskier than to larger businesses, which in turn leads to poorer short-term lending terms. They propose that in times of crises, SMEs respond better if longer-term lending was more readily available as per that of larger firms. The Bounce Back Loan Scheme (*Bounce Back Loan Scheme (BBLS)*, no date a) introduced in 2020 by the UK Government during the Covid 19 pandemic, and which is aimed at helping SMEs to recover and grow, would appear to follow these suggested lines.

2.4.1 - Is it all about the credit rating?

An important point is highlighted by Mkhaiber & Werner (2020) where they found that in the USA, large banks tend to lend to large businesses whilst small banks tend to lend to small businesses, which is a problem in a banking system that is being dominated by large banking corporations. Wang, Han and Huang (2020) also found that in Europe, where they examined bank sizes across 19 countries, that the more power that a bank held, the harder it was for SMEs to borrow from them. The idea of smaller banks being more likely to provide finance to small businesses was also investigated by Suryani (2018) where it was found that the likelihood of small businesses getting finance to aid growth in Indonesia was more likely through the development of relationships between the business and the bank, suggesting that a good relationship between the OME and the bank manager was crucial.

The same symbiosis between small business and bank was reported by Kijkasiwat *et al* (2021) in research which was carried out in New Zealand, as well as by Meslier, Sauviat and Yuan's (2020) findings in France where regional banking tends to be more relationship based and is more effective than national banking at supporting the needs of SMEs, especially in times of crises.

These findings all suggest that a personalised approach is far better for SMEs and yet, in the UK, local branches are increasingly being closed – White (2021) reporting 3770 since January 2015 and, of those that are left, lending decisions are not being taken locally, but rather centrally via computerised computations of suitability via credit scoring systems. Therefore, local conditions that may favour an entrepreneur are not taken into the lending equation.

Further evidence on the link between growth and the access to finance was provided by Lee & Xu (2020) who investigated the difference in growth rates of small businesses in urban and rural settings, finding that those in rural settings found it harder to raise external finance through banks to help fund growth than those in urban settings. But the question of why this is the case still requires an answer.

Brown & Lee (2019) found that it was no harder for a fast-growing SME to raise finance than it was for a slow growing one, and that fast-growing SMEs were less inclined to use borrowing to fund R&D. They also have a higher ratio of debt funding than equity funding. Dwyer and Kotey, (2015) state that 'SMEs have a pecking order of preference for finance; they prefer internal equity to debt and debt to external equity'.

The link between the age of businesses and their speed of growth has already been highlighted, but Pickernell *et al* (2013) highlighted the way that finance and business advice was sourced depending on the age of a business. Their report, which was based on the 2008 UK Federation of Small Businesses survey, highlighted the relative ease that new and young businesses have in accessing financial support and advice from Government sources or other areas such as The Princes Trust but found it much harder to procure finance from public sources such as banks. The reverse was true of older businesses, which raised the question of 'whether an explicit age-differentiated focus is required for government policies aimed at supporting firm growth.'

Al-Najjar & Al Najjar (2017) also highlight the link between the size of the SME and the amount of outside finance required, with larger businesses needing larger amounts of funding (which makes sense), whilst Brown *et al* (2018) identified that credit card financing amongst UK SMEs was more prevalent among 'peripheral geographical locations' as well as among 'innovative, growth- and export - oriented SMEs'. They also identified that SMEs that use credit cards for 'bootstrapping' purposes also tended to need extra financing further down the line. Rostamkalaei and Freel (2016) observed that fast-growing businesses or those intending to grow, tend to pay higher interest rates than their peers.

A study in Brazil looking at how personality traits can affect the capital structures of micro and small businesses found that gender and 'attitude towards debt' (Vieira *et al*, 2020) were important factors. They found that 'female managers demonstrated higher optimism and internal locus of control than male managers, but they had a worse attitude towards debt' both of which ‘exerted a negative indirect influence’, while ‘risk tolerance had a positive indirect effect’. This backed up the findings of Outsios and Farooqi (2017) who’s research into the differences between male and female sustainable entrepreneurs in the UK also found ‘that business pragmatism in a difficult investment environment triggered women’s reluctance to take on debt’. First generation chief executive officers (CEOs), and particularly women, of family run businesses were also found to be more averse to taking on debt in research carried out by Samuel Baixauli-Soler, Belda-Ruiz and Sánchez-Marín (2021) where they found that socioemotional wealth was far more important to the founders of the business than it was for their children when they took over the business.

The problems faced by female entrepreneurs in terms of raising finance in Canada and the USA was examined by Robichaud *et al* (2019), where they found that businesses started by women tended to have less initial capital and were also smaller, which had a knock-on effect in terms of the amount of bank loans that female owned small businesses had.

Research was carried out by Irwin & Scott (2010) on the difficulties faced by SMEs when trying to raise finance in the UK, but with a particular focus on personal characteristics such as ethnicity, gender and education. Using data gathered by Barclays Bank before the 2008 economic crash, they were able to establish that the level of education had little impact on an entrepreneur’s ability to raise finance other than graduates were more able to access funds via a range of sources such as re-mortgaging or via friends/family. Gender had no discernible impact other than women found it slightly easier to raise finance, but ethnicity did throw up that ‘ethnic minorities, particularly black owner managers’ were far more likely to struggle to gain finance and so relied on ‘bootstrapping’.

2.4.2 - Encouraging lending

Horvath & Lang (2020) were interested in examining the use of subsidised loans by governments around the world following the Covid 19 pandemic as a way to ‘alleviate the external financing constraints and stimulate the real activity of small firms’, and as such examined their use in Hungary in 2013 where they found that they were ‘highly effective at promoting investment and job creation’ as well as enhancing ‘the productive efficiency of firms over time’, therefore backing the use of such support mechanisms.

Baldock & Mason (2015) found in their research that the UK Government did, through its use of Enterprise Capital Funds and the Angel Co-Investment Fund, provide good financial support for potential new fast-growing businesses, but highlighted a potential problem in the support available in helping these businesses to maintain their ‘scale and business trajectory’.

This use of government incentives such as grants was identified as a key signifier of the market (formal lending through banks) failing to provide the necessary funds (Lin *et al*, 2020) but that financial regulation and tax structure regulation has a positive influence on formal lending and a negative influence on informal lending. Regulations designed to help the business environment tend to encourage the availability of formal funding sources favoured by SMEs. However, Demirel and Danisman (2019) argue that these forms of lending have little or no effect on growth when targeted at the circular economy, but equity finance was found to be highly effective in aiding growth of SMEs in the European Union, while the research of Moro *et al* (2020) found that

> *government initiatives improve the probability of entrepreneurial firms obtaining bank credit but do not affect the probability of being discouraged from borrowing'* and *'are of most benefit to younger, smaller, high-growth, and more innovative firms that operate in contexts where the demand for, and accordingly the competition for, bank credit is strongest.*

Alperovych, Groh and Quas (2020) sounded a word of warning though regarding the one size fits all type of funding. They identified that governmental venture capital funds aimed at 'young innovative companies' tended to produce better results if 'location, colocation, syndication and industry focus' were carefully considered first.

Growth can also be affected by financial shocks to a business which affect entrepreneurs willingness to take risks, with the smallest of businesses becoming more risk-averse due to lower financial backing (Dalton, Nhung and Rüschenpöhler, 2020a). One of the biggest shocks to trade in recent years has been the Covid 19 pandemic which has reverberated around the world and has resulted in the forced closure of businesses for extended periods of time, whilst other businesses have found new ways to adapt their products and continue operating profitably. Research into the use of grants and loans to support small businesses during a prolonged recession in Croatia revealed that the newest businesses benefited the most from the support and, although they had no significant effect on performance, the extra financial support did help businesses to survive (Srhoj, Škrinjarić and Radas, 2021a).

Arrieta-Paredes *et al* (2019) developed the findings in this area when they reported that even though there was a greater amount of information available across the Eurozone both during and after the 2008 financial crisis, wholesale and retail SMEs still did not utilise government grants or subsidised loans as a primary means of financing, whilst research into the use of subsidies via grants and loans in Hungary following the 2008 financial crash found that there was a 'positive effect on the number of employees, sales revenue, gross value added and, in some cases, operating profit. However, the labour productivity of enterprises was not significantly affected by any of the support schemes' (Banai *et al*, 2020), with no difference in effect between either the use of a subsidised grant or subsidised loan. Arrieta-Paredes, Hallsworth and Coca-Stefaniak (2020) go on to suggest that because of their research into the funding habits of small shops in the Eurozone during and after the 2008 crash, that governments should look at 'developing business regulations that encourage longer-term business planning and incentives, not just by supplying short-term credit to SMEs via grants or subsidised loans'.

Thorgren & Williams (2020) found that Swedish SMEs were not interested in subsidised loans during the initial Covid 19 outbreak as it would increase their debt-to-equity ratio. Instead, the SMEs began to reduce outgoings in areas such as 'deferring investments, reducing labour costs, reducing expenses, and negotiating contracts and terms', thereby backing up the findings of La Rocca *et al* (2019). Therefore, they suggest that governments should find other ways of supporting SMEs in situations such as this, whilst at the same time SMEs could have an eye on parallel projects that they can switch to quickly if required (e.g., gin manufacturer switching to hand gel during the 2020 Covid 19 Corona virus pandemic).

Eggers (2020) summed the whole problem of financial funding up nicely when he stated that it's a 'chicken and egg' situation in terms of strategy and funding – entrepreneurial opportunity and marketing opportunity could increase performance and help the business to survive in times of crisis, but this takes financial resources that at times of crises and/or disaster may be in short supply.

UK national and North East regional policy regarding funding

Within the UK and due to the importance of SMEs to the economy, there are a range of national government supported grants available for new start-ups (a classification that a business remains in for the first three years of trading) and MSMEs to help with growth, innovation, or several other purposes. In order to access these grants, the government encourages SMEs to use business mentors who have experience in a relevant industry via the mentorsme.co.uk website, thus supporting the ideas Jones and Parry (2011a) and Faherty and Stephens (2016).

In 2016, as well as tax incentives such as business rate relief, there were '327 different government grants covering different industries, business stages and objectives' (Chen and Phillips, 2016) including

- The Start Up loan scheme (*Government delivers over one billion pounds of support to over 100,000 small firms*, 2023)
- UK Export Finance and export support service (*Government backs SMEs with new Help to Grow campaign and small business council*, 2024)
- Innovate UK (*Doing business in the UK: toolkit for small businesses*, no date)
- the Enterprise Finance Guarantee scheme
- Enterprise Capital Funds
- the Business angel co-investment fund
- the National Loan Guarantee Scheme
- the Business Finance Partnership
- the Seed Investment Enterprise Scheme.

('Government support for SMEs', no date)

These were added to in early 2020 as the Coronavirus pandemic forced businesses to close for long periods of time, with the government providing financial help to businesses of all sizes through the Job Retention Scheme, help with claiming back Statutory Sick Pay as an employer, deferring VAT payments, providing rate relief for retail, hospitality and leisure business', grants for the self-employed, the Business Interruption Loan scheme and the Bounce Back Loan. Much of this support may have been learned from the 2008 financial crises where, as Cowling *et al* (2018) found, SMEs were hit hard and took a long time to recover in performance terms, with the recommendation that further support should be put in place to help SMEs recover from such shocks in future. However, they also found that young businesses of less than three years old still tended to grow and recover faster, if they survived. Prior entrepreneurial experience had nothing to do with their survival which contradicts the research of others.

The formation of the British Business Bank has also increased the facilitation of lending to SMEs, with over £782m provided in 2013/14, a figure that is double that of the previous year (van der Schans, 2015a).

Regionally, as well as being able to make use of Enterprise Zones as outlined in Chapter 1.3, SMEs in the North East can access a number of support and funding schemes depending on where they are based and what sector they are operating in. These include

- the North East fund (*THE NORTH EAST FUND*, 2017) run by the North East Local Enterprise Partnership and provides funding for SMEs in the Northumberland, Tyne & Wear and Count Durham.
- the North East Business Support Fund (*North East Business Support Fund*, no date) which provide a grant for a variety of business purposes and which covers Northumberland, Tyne & Wear and County Durham.
- North East Access to Finance (*Supporting North East Businesses*, no date) which raises SME funding via public sector investments.
- North East Ambition (*North East Ambition*, 2021) which provides a free consultancy service which identifies skills needs and gaps.
- North East Growth Hub (*Resource*, no date) which provides a central point from which finance and support can be researched across the region from 200 sources.

So, although national and regional support and funding are widely available to UK SMEs, the problem of entrepreneurs being aware of them and wanting to use them other than as a last resort still exists.

2.4.3 - Alternative sources of borrowing, other than banks

Research evidence in the use of microfinance was called into question by Dahal & Fiala (2019) when they re-examined eight studies and, using their findings 'argue that existing research on the impact of microfinance is generally underpowered to identify impacts reliably and suggests that we still know very little about the impact of microfinance'. Microfinancing in the UK is mainly done through community development finance institutions (CDFIs) and, according to McHugh, Baker & Donaldson (2019), is 'conceptualised in terms of responsible lenders offering fair credit to financially excluded individuals using relationship banking practices.' In their research they found that these lenders remain in opposition to mainstream lenders due to the types of entrepreneurs that they are financing which are usually low income. In their conclusion they state that 'offering an 'alternative' economic space geared towards the needs and welfare of low-income individuals remains vital as the UK market is dominated by the commercial interests of the mainstream', sentiments which were echoed in the findings of Mkhaiber & Werner (2020).

Another angle to the problem of accessing finance was raised by Howell (2019) in his research into ethnicity and funding in China where he found that entrepreneurs from the majority Han ethnicity were more likely to get funding from formal sources – a point that echoed issues from the Black Lives Matter campaign in the UK (and elsewhere in the world) where there was a campaign encouraging people to purchase products from businesses owned by coloured people (Howell and Ndukwe, 2020) as it was felt that these businesses were often overlooked by consumers and lenders. However, research carried out in Canada contradicted these reports, revealing that there is no difference in the amount of loans given to immigrant entrepreneurs and those given to native Canadians, with both groups having an equal chance of being accepted (Leung and Ostrovsky, 2018).

Within the UK, small businesses, particularly non-innovative ones (Klein *et al,* 2019), have turned to equity crowdfunding as an informal source of financing growth, with the research of Eldridge *et al* (2021) showing a positive correlation between equity crowdfunding and performance, which leads to more opportunities for growth. However, they also found that equity crowdfunding didn't improve innovation in any noticeable way, whilst Olufolaji and Phillips' (2015) identified that it wasn't always the companies 'social media presence' that attracted investors, rather investors were going directly to the crowdfunding website to scan for investment opportunities that matched their own aims.

The way that investors look at a possible investment is also different according to an investigation into applications on the US crowdfunding site www.prosper.com by Kgoroeadira, Burke and van Stel (2019), who found that it's 'personal rather than firm characteristics' that 'are the main determinants of securing funding and the price paid for it'. In other words, it's about who the person is and their background, including their credit rating, rather than the actual product or service being offered, which demands a different approach from entrepreneurs to lenders – it's an emotive process that to improve one's chance of gaining the finance, the borrower needs to be able to express themselves clearly and legibly by connecting emotionally with the lenders (Pengnate and Riggins, 2020a). The work of Stevenson *et al* (2018) found that in the USA, crowdfunding was increasingly used to fund small businesses in underserviced areas that venture capitalists were ignoring (venture capital tended to be focused on the fast-growing, high-tech businesses) whilst Klein *et al* (2019) stated that:

> *'the most crucial pillar of start-up financing … remains classical credit financing. However, the emergence of new forms of financing with a focus on innovative start-ups, with great growth potential, also illustrates the change in the area of start-up financing that goes hand in hand with digitalization'.*

Mochkabadi and Volkmann (2020) found that although research into crowdfunding was increasing and could now be divided into five distinct research perspectives - capital market, entrepreneur, institutional, investor, and platform; there wasn't enough evidence yet to establish the effectiveness of equity crowdfunding in terms of its longevity and whether one successful campaign will result in a second one also being successful.

Another potential source of finance for MSMEs is business angels although, according to research into their use by French MSMEs, their effectiveness is neither greater nor less than venture capitalists in helping businesses to grow in any area other than employment (Levratto *et al*, 2018). Poposka, Nanevski and Mihajlovska (2016) report that in their findings, business angels and venture capital are the best form of finance for start-up businesses, but that bank loans are still the preferred route by entrepreneurs. They recommend better training and education regarding the options that are open to entrepreneurs as well as greater use of business networks to aid both innovation ideas and sourcing finance.

Smith (1999), however, argues that a greater awareness of the business environment via a SWOT analysis, the gathering of trade intelligence and the use of IT are all good indicators of strong performance – it's not simply about the number of available financial resources, whilst Barbero *et al* (2011) argue that good marketing and financial capabilities tend to lead to high growth via market expansion and innovation. Indeed, the very way that entrepreneur's approach financial planning in the business affects the way that finance is raised according to Wong *et al* (2018) who suggest that it's 'a series of underlying factors (such as personal perspectives, life events and future outlook) which shape the goals and perceptions of small business owners, and influence their financial decision, actions and future funding options'. Owen, Deakins & Savic (2019) also report that their research found a growing awareness of alternative sources of finance for start-up and growth, although some SME owners still didn't like the idea of equity finance as they didn't want to give up any control or ownership of the business. They also highlighted the time wasted by first time entrepreneurs in trying to source finance from inappropriate sources when setting up, such as applying for loans with no track record and when banks have 'retreated' from lending to new start-ups.

The last word on this topic comes from a report by Ughetto, Cowling and Lee (2019) who state that although 'financing remains a key driver of the growth for SMEs and new ventures', the increasing difficulties of obtaining finance through traditional methods, especially for businesses located in remote regions geographically speaking, has led to a need for a more regionally based finance policy which reflects better the needs of businesses in those areas. For example, business angels are not widely used in areas with a 'weak local financial ecosystem.'

2.5 - Innovation and growth

Innovativeness is often linked to the use of modern computerised systems to help create new products and ways of doing things, but what is classed as innovation? The Organisation for Economic Cooperation and Development (*OECD Glossary of Statistical Terms - Innovation Definition*, 2005) have identified innovation as:

> *The implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organisational method in business practices, workplace organisation or external relations.*

However, this problem of identifying innovativeness in SMEs is an area that Harel *et al* (2019) researched, finding that 95% of the small Israeli businesses investigated were classed as being innovative, even if they didn't know it themselves. An example of these unexpected innovative practices was supplied by Attree, McMullen and Kleinschafer (2018) in their report on Beavo's Honey, a honey farm that grew through networking via farmers markets and the internet, and diversification by providing back yard bee hives to the general public. But as Zahoor and Al-Tabbaa (2020) point out ' innovation is a complex process that involves different mechanisms'.

High growth SMEs tend to recognise and utilise technology better and faster, will usually innovate quickly, and be generally more aware of their competitive advantage meaning that they can react to changes quickly (Smallbone *et al*, 1995). Key elements of using innovation to drive growth in Finnish SMEs were identified by Tormo & Storhammar (2019) who identified 'trust, innovation activities and networking' as 'essential components' whilst 'age, technological level and firm location affect firm performance'. The research of Herve, Schmitt & Baldegger (2020) further reinforced the effectiveness of technology use in MSMEs in their examination of Swiss MSMEs, which found that digital transformation of systems allowed MSMEs to raise their profile internationally as they become 'more innovative, aggressive and risk-taking to conquer new foreign markets'.

Hervas-Oliver *et al* (2021) argue that innovation includes both product and process innovators, with product innovators gaining performance from R&D and market knowledge via customers, whilst process innovators gain performance from 'embodied knowledge and suppliers.' More importantly, they state that it's 'not about who's more or less innovative' but about how SMEs go about innovation in different ways. Nair (2020) suggests the use of a collaborative framework that she has created based on her research into female entrepreneurs and the involvement of stakeholders in their businesses, working 'together to pursue mutually beneficial, multitudinous goals' that increase innovativeness.

Lorente-Martinez *et al* (2020) researched the use of customer facing in-store technologies (CFIST) by SME retailers in Spain, a market sector that's being forced to innovate to try and survive, finding that senior management are the key drivers or blockers to the adoption of CFIST, depending on their personal attitude of such technology. Research into how SMEs move from closed to open innovation (Grama-Vigouroux *et al*, 2020) also showed the importance of top down participation to encourage all stakeholders to get on board.

Papadopoulos *et al* (2020) examined the use of digital technologies by SMEs during the Covid 19 pandemic, especially with the increased use of the internet, and found that to stay within the law regarding data security, 'appropriate systems and support staff should be in place to ensure that infrastructure is always available, ensuring smooth operation of all business operations.' This puts further financial and managerial strain on SMEs, possibly having an even larger impact on micro businesses who may not have the staff or financial resources to carry out and support such systems, thus deterring digital sales growth and the pursuit of innovativeness. As North, Aramburu and Lorenzo (2019) state, many OMEs are better at 'sensing' the opportunity that a digitally enhanced growth opportunity presents, than actually being able to 'seize' it.

The findings of Papadopoulos *et al* (2020) back up the research of Thompson, Williams & Thomas (2013) who found there was no link between the use of a website and both innovation and growth among UK SMEs. They reported that good website usage usually equated to good innovation but could distract SME managers into spending too much time on the website due to a lack of information technology (IT) specialists, thus affecting growth.

So, are small businesses more innovative than larger ones? Not according to D'Amore and Iorio (2017) who found that in all areas of innovativeness - product, process (to a lesser extent) and organisational, due to 'a different allocation of key resources, like R&D, human capital and professional management', small businesses lag behind medium and large ones. These findings were also backed up by the research into the utilisation of stakeholders by Italian SMEs producing drink beverages, where the researchers found that 'in the context of SMEs that use local ingredients, local branding and local manufacture, innovation management would benefit from a stronger engagement with stakeholders, which is still underestimated by the current innovation culture' (Pantano *et al*, 2020). They found that innovation was indeed driven by the OMEs entrepreneurial spirit and operated at a very high degree considering they were SMEs, but that there was very limited use of internal stakeholders, and external stakeholders were virtually ignored!

2.5.1 – New technology and networking – a perfect partner?

The problem with networking in the 21st Century is that it's inextricably linked to the use of technology, which creates barriers. Willetts, Atkins and Stanier's (2020) work entitled 'Barriers to SMEs Adoption of Big Data Analytics for Competitive Advantage' gives a very good insight into this issue, breaking down the barriers into five distinct categories:

1. *Business – financial barriers and a lack of cases.*
2. *Environmental – ethical concerns in data use, inability to assess and address data security risks, regulatory issues and the lack of common standards.*
3. *Human – lack of inhouse data analytics expertise and a shortage of consultancy services.*
4. *Organisational – change management, cultural barriers, insufficient volumes of data to be analysed, lack of managerial awareness and skills, lack of top management support, management of technology and talent management.*
5. *Technological – complexity of data, data scalability, data silos, infrastructure readiness, lack of suitable software and poor data quality.*

For any SME, this range of barriers may seem unsurmountable, but for a micro business the question of whether it's all worth it in the first place comes to mind and forms a major barrier to the adoption of new technology as well as potential growth.

Donckels & Lambrecht (1995, cited in Gherhes *et al*, 2016) considered the impact of networking carried out by both micro and small businesses and identified that when networks extend further afield (e.g. regionally, nationally or internationally), the positive relationship between networking and growth is stronger. The lack of what an OME considers a network was demonstrated by Monnickendam-Givon, Schwartz and Gidron (2016) where, amongst ultra-Orthodox female entrepreneurs in Israel, it was found that although they had access to large networks, little use was made of them to promote their businesses, whilst Mitra & Basit (2021) found in their research of second-generation women in the UK of Pakistani descent, that their networks are determined by a complex mix of 'gender, culture and religion', with 'kinship and ethnicity kept at bay while religion and mistrust inform their choices for gendered business growth activities'.

This is all in contrast with the research into 160 journal articles published between 2002 and 2018 by Olanrewaju *et al* (2020) and who revealed that:

> *'The use of social media by entrepreneurs had transcended marketing and it is now used in business networking, information search and crowdfunding for their business. This has led to significant impact with improved firm performance and innovation enhancement being the essential outcomes'*.

The trust issue was raised by Baines & Robson (2001) where their research into how the self-employed in the creative industries in the UK build relationships, found that although their initial thinking that self-employed people would form effective working relationships with other likeminded self-employed people was true in a minority of cases, 'for the most part, links with other self-employed people were tentative and fraught with suspicion', with distrust being 'pervasive' and sitting alongside 'a desire to form new links for information seeking, sociability and to combat the commercial disadvantages of working alone.' The ideas of trust and protecting innovation was also brought to light by Pattinson *et al* (2022) in there research into science based SMEs in North East England who found that those SMEs that were highly creative and sought innovativeness were more likely to network within their known social contact base depending on what level of protection the new idea needed. They also state that it's not purely about networking, but rather the 'innovation ecosystem' that these businesses operate within.

Stankovska *et al* (2016) found that among UK SMEs that some of the barriers to adoption of technology was reducing due to the reduction in the cost of implementation. This has aided their communication abilities, bringing them closer to those of larger companies in the global marketplace.

Collocated crowdsourcing was suggested by Hosio *et al* (2018) as a way to subcontract small tasks out. Their research showed that the use of people that had never met before didn't affect the outcome in any negative way and they suggest that research has shown that quality increases with collocated crowdsourcing.

Foster & Brindley (2018) suggest that networking is actually more suited to the attributes of women as it's all about relationship building, going on to report that in their study of female entrepreneurs in the marketing sector that the women were able to build ‘multi-directional outsourcing opportunities and philanthropic marketing activity’ – backing up the earlier research findings from the UK of Outsios and Farooqi (2017), although their use of family, friends and the community to garner support wasn’t seen as networking by the entrepreneurs.

Regional influences can also affect both the social capital and the build-up of networks (Hallam, Dorantes Dosamantes and Zanella, 2018) whilst research in Australia by Zolin *et al* (2016) on the growth of Chinese restaurants established by immigrants found that;

> *at the* micro *level … coethnic (same ethnic group) networks are critical to the* growth *of an immigrant entrepreneur's* business*, particularly in the early years. But non-coethnic (different ethnic group) social capital only has a positive impact on* business growth *for immigrant* businesses *outside the ethnic enclave.*

In contrast to Chell & Baines (2000) and Monnickendam-Givon *et al* (2016) findings, Roper’s (1997) examination of the use of networking by small businesses in the UK and Ireland found that they use it extensively to help push product innovation forward and raise both productivity and growth.

Karayanni (2015) and Santoro *et al* (2020) highlight the importance of a wide and diverse set of stakeholders within a business network to build up ‘entrepreneurial resilience’ to changes. Kijkasiwat *et al* (2021) encourage the promotion of networking between MSMEs to achieve greater business sustainability and ambidexterity (Senaratne and Wang, 2018) by cooperating with each other, whilst Salder *et al* (2020) suggest that the creation and building of networks is one of the prime drivers of growth in SMEs. It’s also suggested that building up an effective network may allow an SME to get noticed by financial service providers looking for potential investment opportunities (Song, Yang and Yu, 2020a).

The importance of networking was identified by Tajeddini *et al* (2020) in their research into the hospitality industry where they found that ‘in an uncertain, dynamic environment a higher level of risk and entrepreneurial orientation benefit business performance especially when coupled with strong business and social networks’. Evidence from the financial sector also backs up the findings of Tajeddini *et al* (2020) as the earlier research by Pažitka and Wójcik (2019) found that UK financial institutions that had good networking were able to recover from setbacks quicker than those that didn’t have them.

Dossou-Yovo & Keen's (2021) suggestion of changing the idea of linear innovation to a more interactive process that requires SMEs to communicate with each other to complete each stage of development would appear to back up the ideas of Kijkasiwat *et al* (2021) and Salder *et al* (2020), as well as that of Scuotto *et al* (2017) who state in their findings into the use of networks to build knowledge, that ‘enterprises tend not [to] just attract consumers to sell products but also to cooperate with them to generate innovations’. This acquisition of knowledge through networking is highlighted as a key area for successful innovation in Australian manufacturing SMEs along with the adoption of modern information and communication technology (ICT) systems (Evans and Bosua, 2017a), with further evidence of the effectiveness of networking provided by Forsman & Temel (2016) who suggest that ‘innovation policies should be shifted from innovations to innovators. In addition, these policies should promote networking activities not only to innovation exploration but also to innovation exploitation’, whilst research into the use of stakeholders in open innovation showed the effectiveness of networking for SMEs with all stakeholders, at different times, and for different purposes - e.g., universities for idea generation, larger enterprises for resources such as equipment or sourcing finance (Albats *et al*, 2020; Benhayoun *et al*, 2020).

Leckel *et al* (2020) suggest that open innovation would benefit through the development of regional forums by local government, where different parties involved can get together face-to-face to discuss and strategize ways forward as opposed to the different parties entering their point electronically over the internet, as well as to allow SMEs to network more effectively for future projects. Huber, Wainwright and Rentocchini (2020) argue that without these sources of 'open data', open innovation will never succeed, and is one of the reasons that open innovation hasn't taken off yet, as demonstrated by Duate Alonso and Bressan (2014) in Italy.

Alford & Page's (2015) research into the use of technology for advertising purposes found that although OMEs of SMEs were eager to employ the use of technology in their advertising, lack of knowledge and the difficulty in gauging its effectiveness created barriers to its use; whilst Camilleri (2019) found that SMEs in a small European Union country perceived the advantage of using newer technology and digital media in communications, but it was the younger OMEs of larger SMEs that were more likely to utilise it.

The open-source guild business model has been explored by Larner *et al* (2017) as a possible way for entrepreneurs to build up knowledge and experience from participating stakeholders, and build up a network of contacts slowly, but within a support mechanism that encourage the sustainability of both the business venture and the network. However, as they were only working with two businesses in North West England, the authors did recommend that further research was needed into the open-source guild model before any further judgements on its success could be made. To help solve this problem of MSMEs not networking effectively or utilising the open-source guild business model, Moraes *et al* (2020) propose the use of an algorithm that they've designed, and which can be used by MSMEs to calculate the usefulness of joining a business association and by business associations to target effective new businesses to recruit.

Research into the accessibility of modern broadband connections in North East Scotland has found that 'digital deserts' (Palmer-Abbs, Cottrill and Farrington, 2021a) exist in terms of businesses ability to access Next Generation technology – an aspect also identified by Anderson, Wallace and Townsend (2016) as a major concern to small rural businesses and which may help to explain to some degree the findings of Townsend *et al* (2016) and Reuschke & Mason (2020). Concern about the accessibility of data stored using Cloud technology was also raised during research into its use by SMEs in Ireland (Doherty, Carcary and Conway, 2015a).

An examination of the links between Smart Cities (developing the ICT structure across the urban landscape to encourage all users) in Spain and the growth of entrepreneurial activities within them was carried out by Barba-Sanchez *et al* (2019). They found that in every case there was an increase in entrepreneurial activity and that ICT boosts the local economy, lending further credence to the problem of 'digital deserts' (Palmer-Abbs *et al*, 2021) in rural areas as they may be left behind. They suggest that local authorities should take notice of such findings when planning urban development. However, this increasing reliance on ICT is causing problems for the artisanal business concept as their needs are not being considered.

In contrast to the findings in Scotland, small and medium sized hotels in the UK were found to make good use of social media to increase performance particularly when building brand awareness, but not so much for innovation (Tajvidi and Karami, 2021a). However, they also found that face-to-face activity was still a very important part of their marketing strategy as well – technology hasn't replaced it, it's enhanced it.

2.6 – Research findings regarding factors affecting micro business growth

Academics and the government are only just beginning to acknowledge the importance of micro businesses to the economy and therefore they have not been studied much in the UK, when compared to SMEs, and very little academic research was found that was focused on micro businesses in the North East of England, especially research into a dedicated industry.

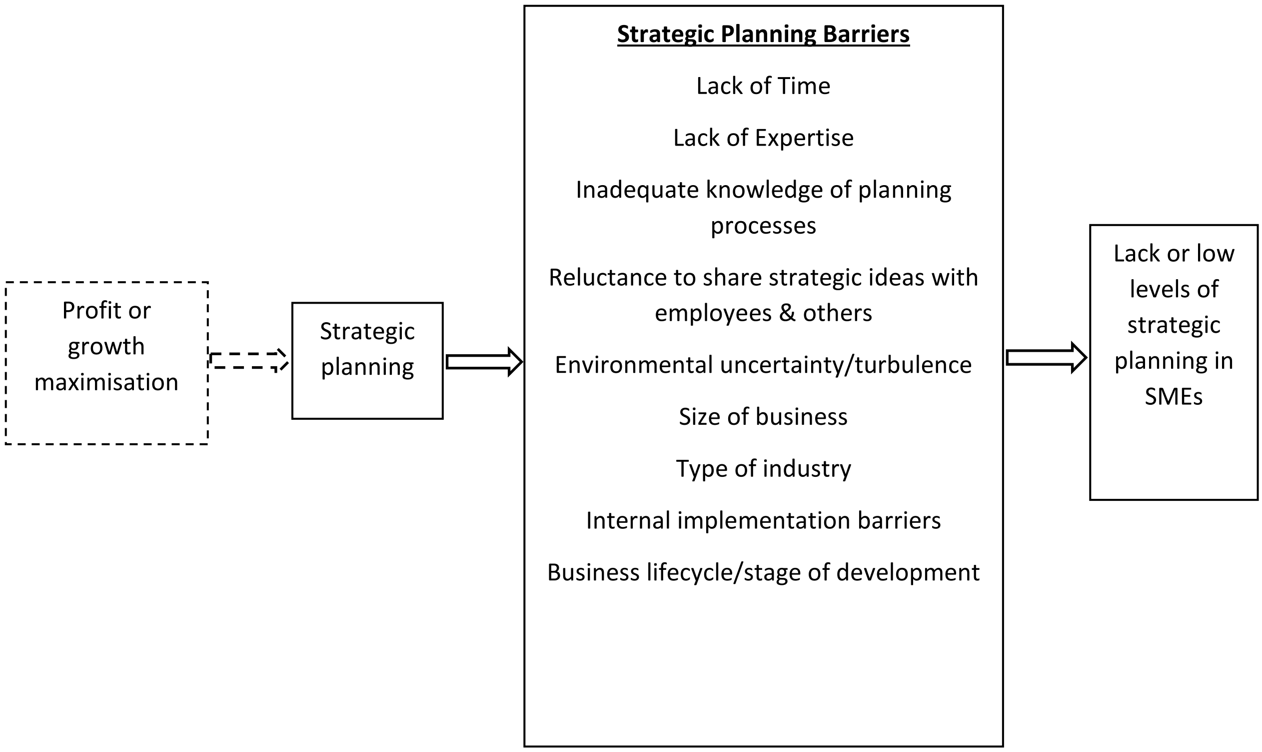
Researchers such as Bellamy et al (2019) argue that although SMEs may not undertake any formal planning, they do constantly review the business environment. Fatoki (2016) also found that many micro businesses carried out scanning of the 'task environment' – the 'external environment of an organization which affects its ability to reach business goals'. This task environment could be 'any business or consumer with direct involvement with an organization' (Monash Business School, no date). However, Fatoki (2016) did also state that scanning was limited when it came to the 'general environment' (the PESTEL analysis). These findings back up those of Bianchi *et al* (2018) who examined planning in SMEs.

The findings of Richbell *et al* (2006) showed that 50% of their respondents from micro businesses that had a business plan, had a positive relationship to a growth orientation. This suggests that planning promotes the intention of growth, and that an education beyond secondary school (16 years and older) as well as prior work experience tended to promote the use of business planning.

However, an issue highlighted by Wang *et al* (2011) regarding the research from the likes of LeBrasseur (2003), Greenbank (2000a) and O'Dwyer & Ryan (2000) is that, although they've researched the use of planning in SMEs, an important part of the definition of an SME is that it is a business that has less than 250 employees and there is a huge difference in the planning requirements of a business with 245 employees, compared with a micro business with, for example, five or fewer employees. There is also a big difference amongst micro businesses planning requirements as, a business that has nine employees is more likely to plan than a business with one or no employees. To help explain the reasons behind the lack of planning in micro business, they created a flow diagram (Image 11) which shows the barriers to planning faced by micro-OMEs.

Image 11 - Extant Approach to Explain Lack or Low Levels of Strategic Planning in SMEs

Source: Wang, Walker & Redmond (2011)



Wang *et al* (2011) summarised the barriers to planning very succinctly and proposed that studies into SME planning were substantially wrong in terms of their focus, which was based around the needs of larger businesses (the business level), and which didn't consider the reasons behind why entrepreneurs set up their businesses in the first place (the individual level). They argue that as all businesses are assumed to be profit or growth driven (Image 5 dotted lines), with no allowance being made for the entrepreneurs that don't follow this model, therefore raising several barriers to planning instantly.

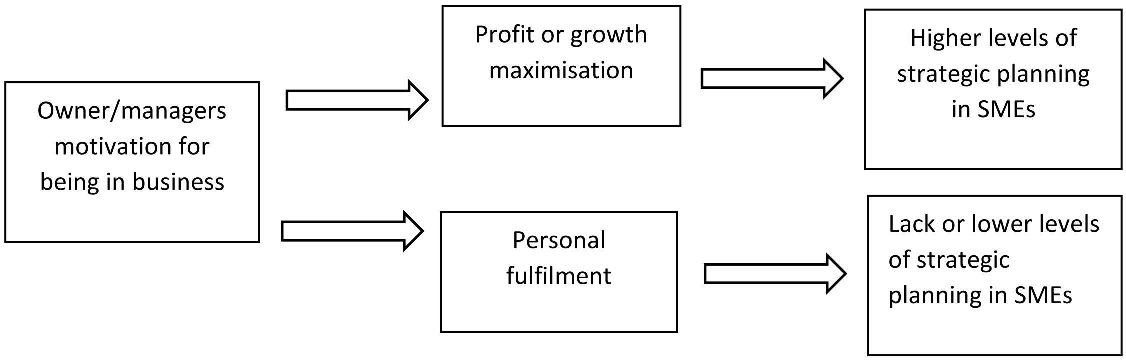
The Exploring Strategy Framework (Whittington, 2020) is a good example of this problem (Image 12). It is very good for examining the business environment of a larger organisation or even a small trade such as picture framing as a whole or in a region, but OMEs of micro or small businesses would have to invest a lot of time and/or resources into carrying out this type of research – time and/or resources that they don't necessarily have, and for what they may perceive as generating very little benefit if they are not growth or profit driven.

Image 12 - Exploring Strategy Framework by Richard Whittington (edcashell, no date)

What Wang *et al* (2011) propose instead is that analysis begins with the individuals reasoning and motivation behind the business venture (Image 13). This model is based around Mintzberg's (1984) statement (cited in Wiklund and Shepherd, 2005); Wang *et al*, 2011) that 'actions and decisions in SMEs revolve around the owner-manager such that "its goals are [the owner-manager's] goals, its strategy [the owner-manager's] vision". Essentially, they argue that most SMEs (and therefore micro businesses that may not even be considered entrepreneurial as it's simply a way to seek employment) businesses don't 'strategically plan' as they don't pursue profit or growth and therefore don't see the need to plan strategically.

Image 13 - Proposed Approach to Explain Lack or Low Levels of Strategic Planning in SMEs

Source**:** Wang, Walker & Redmond (2011)



In a 2020 study on Serbian micro businesses, it was found that there was a direct link 'between intellectual agility, entrepreneurial leadership (measured through future orientation and community building) and the innovativeness of micro and small businesses in an efficiency-driven economy' (Dabic *et al*, 2020). The findings highlighted the importance of the agility of employees to be innovative under the effective leadership of entrepreneurs. Therefore, if a micro business has employees, it's not the sole responsibility of the OME to provide innovative practices.

2.6.1 - Growth drivers of micro businesses

A research project on 522 micro home-based businesses (HBBs) in New Zealand was undertaken by Clark & Douglas (2010) and which threw up some interesting findings.

- A variety of business models are utilised in terms of the 'owner may work full-time or part-time on his/her HBB or work part-time and also be involved with other businesses or work part-time on the HBB and also work as an employee for another organisation.'

- Over half of the HBB workers generate over 60% of their income from the HBB yet, for another third, it's only 40%.
- The HBB's were overwhelmingly operated by a single person with no employees, and the majority had been operating for less than 10 years, with 14% operating for more than 15 years.
- Portfolio wise, the most popular was 'multiple products in a single market/industry', with sales not only locally, but regionally, nationally and international. However, the income from international sales was negligible.
- HBBs 'are strongly committed to growth and appear to have adopted business processes and information technologies to achieve their aspirations.'

However, Clark & Douglas' (2010) work is limited in its scope as it was the first such research into HBBs and so lacks any in-depth results, though it does demonstrate the degree of income that can be derived from micro HBBs and it would be interesting to see the research emulated in the UK to see if the figures match in a larger, more industrial country.

Four years later, Clark & Douglas (2014) returned to the subject of HBB growth patterns in New Zealand and found once again that they were very focused on growth but that five distinct patterns were beginning to assume a dominant position in terms of importance – 'website adoption, internet access, identifying target markets, marketing expertise including branding and internet protocol (IP) protection.' All these patterns were inextricably linked to the isolation that HBBs operate in and therefore they are forced to sell online.

A later review of studies into small online businesses by Anwar & Daniel (2016) established that entrepreneurs that set up this type of business often have caring responsibilities, are highly risk averse, have limited access to financial backing, or 'have limited skills and are unable to access education or training'. They also found that these entrepreneurs can easily become 'locked-in' to the venture which creates multiple 'sources of stress'.

Research in Finland on 53 rural micro businesses found that 'there was a strong connection between micro firm growth and how turnover developed' and that 'the relationship was stronger in technology-based micro-firms than in service-based ones' (Hänninen *et al*, 2017). This research would suggest that growth is easier to come by in technology-based businesses, which is a problem for non-technical sectors.

Does Gender and/or ethnicity impact micro business growth?

Clark & Douglas (2014) also found that slightly more women owned HBBs (56%) in New Zealand which matched the results of a similar study in Australia by Gerrish, Leader & Crocker (2010), cited in Clark & Douglas (2014). This may suggest that HBB's are being set up around the demands of family life, therefore following the necessity route (or Plan B as Thébaud, 2015, put it). However, there is no evidence that gender affects the growth of HBBs or micro businesses.

Haq *et al* (2021) found that amongst ethnic minority micro businesses, 'compassionate customer service' was of paramount importance, especially in non-online businesses where the face-to-face aspects allow for much greater personal interaction. However, this is not a surprise when the importance of personal service in micro businesses, such as that found by Townsend *et al* (2016) is considered.

2.6.2 - Why micro businesses may not grow

As already stated, growth of micro and small businesses can be curtailed by the OMEs themselves. According to Davidsson (1989), this is because they are more concerned about

- maintaining independence (the most important factor according to Casser, 2007, cited in Gherhes *et al,* 2016),
- managerial control,
- staff welfare.

This can then lead to a negative feeling towards growth and that these deterrents to growth grow stronger as the business grows between five to nine employees. Any loss of control can lead to bankruptcy (Greenbank, 2001). Research by Chell & Baines (2000) revealed that 75% of the micro businesses that were involved in their research were not growth orientated which backs up these ideas.

Micro OMEs often enjoy greater non-economic aspects such as being your own boss, greater independence and flexibility, a better standard of living, increased leisure time and job satisfaction (Fielden et al, 2000; Poutziouris, 2003; Wiklund *et al*, 2003; Walker & Brown, 2004) and may also be focused on revenue growth based on their income requirement, not employment growth (Greenbank, 2001). Basically, many micro-OMEs simply want to make a living, not actively pursue growth (Reijonen & Kompulla, 2007), thereby stymying growth through the satiation of motivational factors as well as perceptions of ability, need and opportunity (Davidsson, 1991).

Gray (2002) and Matlay (2004) talk about a ‘size-related effect’ in that micro businesses prefer the status quo and are therefore growth averse, with their objectives being based around family and lifestyle, ably demonstrated by Hamelin (2013) who’s research into family run businesses in France suggested that growth wasn’t restricted purely by finance, but by a conservative approach to investment whereby, as more family members get involved in the business, new ventures need to provide a higher return, thereby putting the family members off the investment. They are effectively dis-incentivised to grow to protect the survival of the business. She also raised the issue of opacity in accounts to try and stay below tax thresholds, thereby purposely limiting growth so as not to exceed them.

Hogarth-Scott *et al* (1996) found that growth in micro businesses was incremental, and that the lack of enough work to warrant more employees also limited a business’ growth potential, a point backed up by Fielden *et al* (2000) who found a reluctance by some micro businesses to employ people due to the difficulty and cost of employing them.

Soloman & Mathias (2020) back up the findings of Braidford *et al* (2017) in their research entitled 'The Artisans' Dilemma: Artisan Entrepreneurship and the Challenge of Firm Growth' where, by focusing on a defined group of entrepreneurs who are traditionally seen as eschewing the use of modern manufacturing techniques (oppositional identity that rejects growth), preferring instead to remain true to traditional methods, they were able to suggest that actually,

> *as artisans recognize growth as a means to engage a relational identity, it begins the process of becoming growth-oriented, which is a deviant behaviour in the eyes of artisans. Conversely, when artisans focus primarily on meeting their own artisanal standards rather than serving stakeholders, they tend to see little value in growth and prioritize retaining their independence by remaining small.*

Essentially, Soloman & Mathias (2020) found that artisan entrepreneurs with counter-institutional identities actively sought to reject any ideas or solutions that may lead to growth – they positively embrace a "who we are" value. However, these findings were muddied due to the two opposing ideas of the term "we", in that some included all stakeholders which did indeed set them on a defined growth path, whilst others wanted to maintain their independence.

2.6.3 - Business support

Lean (1998), Fielden *et al* (2000) and Devins *et al* (2005) all argue that there was a lack of Government support for micro businesses and OMEs needs at the time of their reports, both during and after start-up, with areas such as training and development of both staff and OMEs not being addressed. This lack of training and development programmes was also identified by O'Dwyer & Ryan (2000). Fielden *et al* (2000) also found criticism for financial institutions for failing to support micro businesses whilst also reporting that there was a lack of general outside advice on areas such as tax and accounting, or when it was available it was of limited use due to support organisations beliefs that micro business' needs are the same as small business' needs (Greenbank, 2000b).

Matlay (2004) goes further by suggesting that some of the support for small businesses actually omits the needs of micro businesses altogether, backing up the findings of Lean (1998), Fielden *et al* (2000) and Devins *et al* (2005), but does also state that the findings showed that when support is available for micro businesses, it is useful. Faherty and Stephens (2016) also found that support for micro businesses was lacking, and that the use of a 'one size fits all' policy was detrimental to the likes of rural businesses, and it often excluded retail businesses altogether. They also suggest the development of a 'brokerage service' to help businesses that have been identified as having potential to grow by providing help and assistance to do just that, as they found that several of the businesses that they analysed didn't know how to go about growing, which links back to the findings of O'Dwyer & Ryan (2000) and shows that nothing had really changed within that period.

To fund or not to fund?

A big problem for all governments around the world is the argument over whether financially supporting micro start-ups is a good use of tax payers money in terms of employment growth. Criscuolo, Gal and Menon's (2017) findings show that the 'up-or-out' attitude found in the USA of growing rapidly in the first three years or failure, is prevalent across the 16 developed economies in their study. They found that micro businesses that didn't grow beyond 10 employees within the first three years tended to be more likely to be inactive sooner than micro businesses that had been trading for over 11 years – establishing that fast growing businesses are more likely to be volatile in terms of survival. The work of Jha & Depoo (2017) helped to further understand the importance of micro businesses in the USA and how they helped the economy to recover following the 2008 recession, with their findings showing that micro businesses have a much stronger link between 'employment and income creation as measured by annual payroll' than any other size of business.

In their research on entrepreneurial training, Al-Awlaqi, Aamer & Habtoor (2018) recommend that regular training should be provided for micro businesses to increase their innovativeness and become less risk averse. A possible way to help micro businesses develop skills is through the development and promotion of organisational development and learning methods. This has been suggested by Gray & Jones (2016) as, during their research into the use of these methods in micro and small businesses, they found that there was 'an immediate positive effect on business owners and long-term effect in relation to business confidence, clarity, and action'.

2.6.4 - Financing

One of the problems with all the research into finance options for SMEs is that once again, the focus is on SMEs, with very little or no research being carried out into the different approaches taken by micro businesses. This problem was researched by Masiak *et al* (2019) where they found that the main differences in approach in Europe was that micro businesses tended to rely on internal sources of finance to fund growth and, in the case of the smallest micro businesses, would rely on borrowing in the form of credit cards or overdrafts due to the difficulty in raising funds through other sources of borrowing.

One of the reasons that small, and micro businesses in particular, have problems raising finance from banks is the high risk of them defaulting on the loan, leading to higher rates of interest being applied to such loans. Knewtson & Qi (2019) suggest a new method of credit insurance for microfinance loans that would allow banks to become less risk averse and therefore help micro businesses to grow through more reasonable financing options.

Linked to the credit worthiness of OMEs is the work of Cressy, 1996 (cited in Gherhes *et al*, 2016) and Bellamy (2019), both of which highlighted the link between the amount of initial capital that OMEs had to start a micro business, and how that financial starting point could determine the rate, or limitation, of start-up growth. The aspect of whether a prospective entrepreneur can even get access to sufficient finance and how that helps to decide on the approach taken to starting up is also raised.

Encouraging lending

To help with the problem faced by micro and small businesses when accessing financial assistance from banks, the UK government introduced a loan guarantee scheme in 1981 (Cowling *et al*, 2018) and is now ranked number one in the world by the World Bank for start-up loans (Chen and Phillips, 2016). Another country to have introduced a loan guarantee scheme is Spain, one of which was investigated by Martín-García and Morán Santor (2021). Their research findings into public credit guarantees on business loans in Madrid reveal that they drive 'turnover and investment during both recession and growth', and while they have a **'**substantial effect on all small companies', it's micro businesses that they have the 'greatest impact on' due to the difficulty of borrowing under normal terms for these types of business. These findings built on the research of Caselli *et al* (2019) who also found that using the Italian State Credit Guarantee Scheme, micro and small businesses, particularly manufacturing ones, found that profitability rose during a period of downturn before 2008, but it did also raise the issue of whether there should be targeted support.

However, Cowling *et al* (2018) argued against the effectiveness of loan guarantee schemes in terms of building the level of employment, citing evidence from their findings in the UK on the removal of the 5 Year Rule on eligibility in 2008, where businesses had to be under five years old.

Research into the effects of black swan events on micro businesses in France, showed that micro businesses survived through internal sources of finance such as selling underutilised equipment and making better use of the resources that they had – for example, utilising working capital (La Rocca *et al*, 2019), rather than taking out further loans (Van Hoang *et al*, 2018).

2.6.5 - Networking

Chaston (2000) states 'Networking improves organisational learning' (backed up by Bai *et al*, 2019), 'enhancing flexibility, proactiveness, responsiveness to market changes and increasing competence'. This was backed up by Reuschke, Mason and Syrett (2021) who found that networking by micro businesses with one or less employees was of critical importance, as well as that there is no noticeable difference in the use of technology between young male and females. However, males use it markedly more often as they become middle aged or older.

Baines & Wheelock (1998, cited in Gherhes *et al*, 2016) and Chell & Baines (2000) identified the positive link between networking and growth that has also been identified amongst SMEs, but in their study found that only a few micro businesses undertook any networking activities, either formal or institutional. However, social media has taken off since their research was done so this may not be the case today, although Duarte Alonso and Bressan (2014) raised the problem of the ‘individualistic character/personality of the artisans, preventing a unified business philosophy or common ways of conducting business’ as a major hurdle to them taking advantage of networks to grow their businesses.

Roper & Hewitt-Dundas (2017) propose that micro businesses are so important to ‘new-to-the-market’ products that they should be included in any further research into innovation studies. Their research showed ‘strong support for the interactive nature of micro-enterprise innovation and suggest the potential value of a model of interactive creative destruction’ as well as the importance of ‘market-based and supplier-based collaboration’ – particularly the latter if accompanied by a recommendation (Tóth, Nieroda and Koles, 2020a). Supporting these ideas, Abreu & Picchiai (2019) examined the use of subcontracting amongst micro businesses in the furniture sector in Sao Paulo, Brazil, finding that it allowed the business owners to focus on the strengths of the business, increased the productivity, and reduced both their costs and delivery times – all which allowed the owner to increase their own knowledge/skills base through the investigation of new technology or methods of production. However, they did record a tendency towards a resistance to change by the owners, problems selecting the correct sub-contractor and a lack of rules between the two parties.

For these self-developing loops via networking to lead to innovation, an inter-organisational knowledge mechanism and inter-organisational learning must be embedded (Garousi Mokhtarzadeh *et al*, 2020). The research of Duarte Alonso and Bressan (2014) demonstrates the problem of achieving these beautifully. They examined a group of 16 artisan businesses in the terracotta trade in the town of Impruneta in Italy and found that although all the business owners recognised the advantages of networking and cooperation to improve their products and skills, only four of them were members of a local artisan association where they were involved in collective promotional activities. The other 12 business owners were happy to keep their ways of working to themselves, with problems arising over the older artisans not sharing skills with the younger generation and some businesses beginning to source raw materials from outside of the area, thereby watering down the ‘local’ appeal of the terracotta products.

Wilf (2020) has examined the importance of communication – something inescapably linked to technology in the 21st Century, between suppliers and micro businesses and found that although some suppliers were very good at building up the relationship with the OMEs of micro businesses through effectuation (McGowan, 2020a), this over reliance could actually lead to long-term failure of the business.

The idea of networking, of ‘spreading their wings’ farther afield, was also looked at by Hogarth-Scott *et al* (1996) and Greenbank (2000a) in which was found a reluctance amongst micro-OMEs to carry out formal advertising as they perceived it as ineffective, preferring instead to rely on word-of-mouth to get their name known. However, Patel *et al* (2021) argue that their research into the use of advertising by businesses in Portugal shows that the OMEs are eager to advertise as ‘they realize a positive survival benefit from marketing capability’.

Much has been written about the undoubted growth in the use of the internet to advertise and sell products and to a point Townsend *et al* (2016) found this when they looked at networking, mainly online, by rural Scottish micro businesses. They found that a large percentage of them used Facebook and/or Twitter for initial contact, but that trust tended to be built up through face-to-face contact. However, they did feel that the use of technology was limited by the entrepreneurs perceived ability (or lack of) to use the technology. In a further study of Scottish HBBs by Reuschke and Mason (2020), the use of these modern electronic channels to trade was questioned as they found that only one third of the sample of HBBs traded online, whilst only a fifth of them derived 50% or more of their income from online sales, thus suggesting that perhaps the use of e-commerce by micro and small businesses has been hyped up as the majority of them are clearly deriving their income from non-online origins, all which was corroborated by the earlier findings of Gamble *et al*, 2019.

One of the non-online origins of income that rural HBB's may have is via 'Honey Pot' rural enterprise hubs. These were the topic of the research by Merrell *et al* (2021) who looked into their use in two areas of North East England, finding that creative OMEs were using them 'as a shop window, granting them more visibility and additional opportunities to sell their goods and services, as well as several softer benefits around networking, accessing knowledge and forming collaborations.'

2.7 – Chapter 2 review

In chapter two, a literature review was undertaken to establish what research had already been undertaken within the broad area of MSMEs, with all articles visited being recorded using the software package Zotero to aid the use of the correct referencing style and the creation of a bibliography. This literature review revealed that several authors had proposed that growth is determined by factors such as education level (Cassar, 2006), managerial experience (Rosa & Scott, 1999 cited in Gherhes *et al*, 2016), financial backing (Douglas, 2013), support (Robson & Bennett (2000), cited in Gherhes *et al* (2016), social awareness (Tomasella & Ali, 2019), location (Reuschke and Houston, 2016a) or personal ambition (Morrison *et al*, 2003) amongst others. All these factors could pose a barrier to growth for MSMEs. However, the literature review also revealed some of the trends that existed around those micro businesses that had grown such as the adoption of technology (Smallbone *et al*, 1995), exporting (Jung, Peña and Arias, 2012) or coordinating the development of new ideas and products with other MSMEs (Nair, 2020), with each specialising in their own area of expertise thereby reducing competition and the duplication of resource usage.

Through this literature review a huge gap in academic knowledge pertaining to the picture framing trade was revealed, with the only articles being found relating to the history of picture frames (Allan, 2016), not the trade itself or operation of businesses within the trade. It also became obvious that research into micro business growth, or lack of, particularly within the North East of England, was an area open to further research as very little prior academic research was found from this region. As a substantial percentage of picture framing businesses can be classified as micro businesses, the development of a case study about the trade in the North East became the focus of the research as it could form the basis of future research into this, and other, industries – be they creative or not.

Therefore, from this literature review the formulation of the research question was refined and developed as:

Is there a future for low tech micro businesses such as picture framers in the North East of England?

The literature review also helped to define the aims and objectives of the research in that five main topic areas relating to the growth of MSMEs were identified, namely around planning, growth drivers, business support, funding and innovation/networking. These five topic areas would drive the research and form the core of the first five aims as outlined in section 1.6.

Chapter 3 - Research Methodology

The research methodology chosen 'is second only to choosing the primary research question itself' (A. W. Phillips, 2017)**.**

In Chapter 2, a thorough literature review was carried out in order to establish the extent of prior research in MSMEs. This research revealed that very little research has been carried out in the North East of England and very few industries have been researched across the whole of the UK. Therefore, research from other developed economies was also examined in order that an appreciation of the wider research community could be built.

This combination of research sources revealed five key topic areas on which the research for this thesis could be built upon.

In Chapter 3 the research methodology will be provided in depth so as to demonstrate the thinking behind the research.

In Chapter 3.1, the thesis seeks to clarify the philosophical approach towards the research, outlining both the epistemological and ontological approaches taken. There is also an explanation behind the choice of research philosophy and methodology based on the findings of authors such as Strauss, Corbin, Denzin, Lincoln, Gobo and Silverman to mention just a few. The work of these seminal authors helped to shape the approach taken within this thesis, based on their own experiences and practices.

Chapter 3.2 examines the data collection methodology with an explanation of why the explanatory survey research method was chosen over other methods. It goes on to describe how the survey questionnaire was designed, with the reasons for these choices being outlined, as well as explaining why a face-to-face method was chosen over other survey methodologies. Chapter 3.3 is completed with an explanation around the decision to use a case study approach in the construction of the research findings and an examination as to what the advantages of using a workshop approach to collecting the data would have been, and to why the decision was made not to use this method.

Chapter 3.3 provides information on where secondary research was carried out regarding the picture framing trade itself, providing some advantages and disadvantages of these written sources. The reasoning for using these, and other trade sources in an informal way, is explained, and a PESTEL style analysis of the picture framing trade is undertaken to drill down to some of the issues facing individual picture framers in the North East.

Chapter 3.4 relates to the pilot study that was undertaken to test the questionnaire and develop the research methodology. The findings from these micro businesses provided some interesting results on which to compare the findings in the main research as well as against those of other authors. An explanation is provided as to why a mixed method was adopted with the questionnaire design and a methodology provided.

Chapter 3.5 explains how the sample size was arrived at for the main research into picture framers in the North East and how the respondents would be chosen from across the region. A discussion regarding response rates is also undertaken along with an explanation of why the mixed method of research was changed to qualitative. The section concluded with an outline on the software to be used for analysis of results and its usefulness.

Chapter 3.6 provides details on the main research's structure and includes an outline of the reasons behind the use of thematic analysis as devised by Braun & Clarke (2006). This is followed by an explanation of how it was used.

Chapter 3.8 outlines the ethical considerations considered and the reasons for these decisions, with Chapter 3.9 providing a summary of the chapter.

3.1 – Philosophical approach to the research

Epistemology, or the theory of knowledge (Hillerbrand, 1988 cited in Vejar, 2021) is based around the idea of truth, belief, and evidence being required to build knowledge and has been accepted by academics as far back as Plato (428 – 348 BC). He stated that truth reflects reality and, once others also acknowledge this truth then belief takes hold, with evidence being provided through the defence of this truth. It is the search for information pertaining to a given circumstance, which is then communicated to an audience to convince them of its truth through thorough cross questioning by other academics or people also knowledgeable in that given area. Hillerbrand goes on to suggest that the following set of Aristotelian epistemological tenets should be adopted when considering an epistemological approach to clarify ones thinking on the type of methodology required:

- Theoretical – knowledge for knowledge's sake.
- Qualitative – recognition of and celebration of individuality.
- Performative – the procedures used to guide people towards what is considered as appropriate actions.

From an epistemological point of view, this search for knowledge can be divided into two distinct methodologies – quantitative and qualitative. Quantitative researchers seek to build knowledge via a latent variable among a range of good indicators, whilst qualitative researchers seek knowledge via 'defining attributes of a concept' (Goertz and Mahoney, 2012).

An integral element of epistemology is ontology, which is the search for what is or what exists. There are two strands of thought concerning ontology, one which believes in an objective reality that is living independently of the observer; the other follows a subjective reality belief as it appears, or as negotiated within a group.

For this research thesis the approach of an ontological realist was adopted, as the researcher believed that the reality of what he was setting out to research existed but also acknowledged that both his, and the people answering the research questions, may have had their views influenced by any number of factors that 'comprise the social construction of reality' (Kalof, Dan and Dietz, 2008) – *ceteris paribus* did not apply in this instance. This approach was taken as the main research tool used was to carry out primary research, face-to-face with the respondents, on a topic that was their livelihood, and therefore the researcher believed that what they were telling him was their actual experience – it's an interpretive approach from which deductions can be made. Therefore, why would the information that they are providing be false? The researchers own experience in the trade (as outlined in Chapter 1.3) also allowed him to understand when any extreme views may have been expressed by the respondents, and which didn't fit into any of the norms that was expected and could therefore be filtered out of the results – it provided theoretical sensitivity (Strauss and Corbin, 1990). This included, for example, any jaded views on areas such as politics within the industry or a particular supplier, that may have built up over time and which also included any social influences that may have built up within the researchers mind and was unwittingly portrayed to the respondents. This aligned to the epistemological approach of believing that the research was to be carried out in an objective manner that would provide unbiased observations on which to draw the conclusions.

Why was a mixed method of research rejected in the main research?

Epistemologically, quantitative and qualitative data can be collected during research, but their use is dependent on what is required from the research. As Plowright (2011) writes, the traditional form of research was that of a scientific approach which could be counted and checked repeatedly to build up a definitive arsenal of evidence to prove the findings of the research. That was it, opinions didn't matter as they couldn't be quantified easily or satisfactorily - science based researchers simply ignored the work of the social researchers. However, in the latter part of the 20th Century there was a growing recognition amongst modernists (Grbich, 2004) of the importance of qualitative data to understand the underlying reasons for quantitative results – thus formed the qualitative inquiry movement in the 1970's (Denzin *et al*, 2000).

Fast forward into the 21st Century and researchers no longer must think in terms of only two different types of research paradigms, and never the twain shall meet. But rather, they understand that the use of a mixed methodology form of research is a way of backing up the findings of one or the other type of research, with either qualitative or quantitative research taking the dominant role while the other takes a support role (Strauss and Corbin, 1990) – it's what Creswell and Plano Clark (2007) call an embedded design.

The focus of this research will be qualitative in nature to build up a case study containing rich data obtained in a close-up manner that encourages the respondents to talk openly about their experiences of running their own business, with questions being asked in such a way as to encourage the respondents to give as much information as possible via development questions where possible. This information is required to build up an evidence bank on the reasons why entrepreneurs within the picture framing trade make decisions relating to growth and what influences those decisions.

The use of a qualitative led form of mixed research in the pilot survey fitted in nicely with the ideas of Saldana, Leavy and Beretvas (2011), Plowright (2011), or Layder (2018). It is an approach that has grown in popularity in recent years as it allows researchers to adopt a formal approach towards their research, whilst allowing for either further quantitative or qualitative research to be done as and when required, either as a standalone follow up to the initial research, or as an adaptive form of research based around the findings as they are generated – it is a process-centred (Flick *et al*, 2017) approach that is both theory and question based. As such, some quantitative questions were included in the pilot survey as a secondary source of data, to gain some basic background information about the respondents. This allowed a check on the validity of other research findings such as education level, experience (Cooper *et al*, 1989; Barringer *et al*, 2005; Lofstrom *et al*, 2014) or age (Cressy, 1996) to be made - it offered the opportunity to garner a lot of information in one visit, whilst allowing for any follow-up research with individuals should it be required.

However, upon reflection following the pilot survey, it was felt that this data could easily have been obtained via the discussions and that the research needed to be adapted to provide data in a way that allowed the respondents answers to flow – it needed to be adaptive to the given situation. Therefore, this mixed research style was changed to a purely qualitative style for the main research.

Various research strategies can be followed whilst carrying out research as shown by Janesick (Denzin, Lincoln, *et al*, 2000). Ugwuowo (2016) summarised the various strategies into five philosophies and research methodologies for researchers to choose from, as well as seven types of research that can be used depending on what is required of the research (Appendices 2). Of the five philosophies - survey, case study, simulation, subjective/argumentative research, action research, it was obvious that a survey was required to garner the views of OMEs within the picture framing trade whose experience would, more than likely, span very different time scales, and would be a descriptive type of research. In other words, the research set out to 'explore a problem' (Creswell, 2013) instead of relying on other research already carried out. The information gathered from the interviews would provide the insight needed at this given point to construct the findings in the form of a case study, which could then be compared to other micro industries in the North Eastern region, and elsewhere, in future research.

As for other research methods, few case studies could be found to exist for any micro industries within the UK let alone the Northeast, and none for the picture framing trade, so the possibility of using them as a basis for this research wasn't open. Simulation methodology is a more scientific approach and would have been useful if the researcher was wanting, for example, to recreate how the process of manufacturing plastic mouldings worked; similarly, the action research method is used to generate new theories from experiments and would have been useful if new ways of attaching plaster decoration to raw wood moulding prior to gilding were being explored. Therefore, these two methods of research were of no use on this occasion and so were not utilised. The subjective/argumentative approach is also of limited use in this research as it is focused on developing new ideas – not something that this research question was considering.

3.2 - Collecting the data

Having decided to focus on a qualitative form of research that focused on the collection of primary data based on the belief of an ontological realist, the form of data collection could be considered. Data collection can be conducted using questionnaires, observations, testing or any other number of options. Surveys, which are ‘An examination of opinions, behavior, etc., made by asking people questions’ (Cambridge English Dictionary, 2021), are one such method.

Properly designed and operated surveys can be used effectively to measure qualitative or quantitative data, or a combination of, that is useful to most situations and can have ‘the equivalent rigor of a psychometric instrument’ (A. W. Phillips, 2017). Rubenfeld (2004) would probably approve of these later views as he stated that ‘Surveys are a valuable research tool for studying the knowledge, attitudes, and behaviour of a study population’.

According to Greenfield and Greener (2016), there are two basic types of survey.

- Descriptive surveys attempt to find out what is happening now and why, with examples such as census data allowing detailed analysis over time. They require a clear idea of what is being looked for in the research and what the classifications to be used are.
- Explanatory surveys describe what is going on, from which speculative theories can be raised as to why it’s happening and form the basis of further research. They need to clearly indicate what the research is about and the possible causes, as well as an explanation on which causes will be the focus whilst also explaining what factors may intervene to cause an effect.

Of these two, the explanatory survey would best describe the approach taken in this thesis as data was to be gathered from subjects that had a direct impact on the decision-making process of their business at that point in time. From this, a theory could be generated on whether barriers to growth exist within the picture framing trade in the North East of England, and how some were able to circumnavigate these barriers whilst others weren’t. It would also allow for a hypothesis on whether the picture trade could survive the changes currently occurring in their economic environment. This would allow for further research later in other areas of the UK to see if the same barriers and problems existed elsewhere, or if it was a regional problem that could also affect other small trades.

Due to the lack of academic research in either the picture framing trade in general or micro businesses in the North East, a one group post-test only design philosophy (Vaus, 2013) was chosen as there was no prior data with which to compare the results, nor was there any from a comparative industry. This lack of comparative data precluded the use of a descriptive form of survey.

The research process would follow the ideas of constructivist grounded theory as espoused by Charmaz (Denzin *et al*, 2000) or Strauss (1987) in that any theories put forth will be grounded by the data generated and will build through the collection and analysis of the data. Although by giving a 'voice' to the respondents it would suggest that it's a postpositivist view, especially as the researcher was trying to distance himself from the respondents answers to build up a picture of what's happening in the North East regarding the picture framing trade; as a realist, the researcher was aware that due to his own involvement in the trade, it would be impossible to detach himself completely from what he was viewing, therefore having to adopt a constructivist approach. Cresswell (2013) would go further with this description and call it social constructivism.

A common misconception regarding surveys is that to carry out a survey, a questionnaire must be used. However, 'survey research and questionnaire research are not the same thing. Although questionnaires are frequently used in surveys, there is no necessary link between surveys and questionnaires' (Greenfield and Greener, 2016; Fogli and Herkenhoff, 2017).

Greenfield and Greener (2016) go on to explain that 'There are two distinguishing characteristics of surveys: the form of data and the method of data analysis'. The form of data involves the collection of data with the same variable and the results being shown in a table, whilst the method of data analysis relies on existing variables as opposed to the creation of them during an experiment. Surveys are useful as they can be carried out on a whole host of people, industries, countries etc, with suitable headings being entered in the left-hand column of a table.

Other authors agree with this separation of survey research and questionnaire research, with Gobo and Mauceri (2013) stating that:

- *The survey is a methodology and may be identified with the entire process of research (from design to data analysis).*
- *The survey interview is the method by which the survey gathers its data.*
- *The standardized interview, which has become dominant in the last century, is a particular instrument, a specific way of collecting survey data.*

However, they feel that these three different elements have all 'collapsed' into one thing in both research practice and survey literature.

Based on these findings, survey research was identified as the most suitable method to gather the data due to the number of personal viewpoints and range of experiences that were likely to be expressed by participants.

Surveys allow a researcher to use a range of question styles to garner information, such as

- open ended
- fixed response
- multiple choice
- rating scale
- ranking

A range of question styles can be used within a single survey if a variety of issues are being investigated, a system which was to be employed in this thesis during the pilot research into micro businesses, as generic data such as age, gender or level of qualification was easily recorded via closed questions, whilst questions on the likes of technological impact were likely to garner a wide range of views and therefore were left open. Use of such surveys may be of limited use in postal or online surveys as people may not wish to spend a long time answering open questions, therefore a face-to-face method was employed either in person or via Skype/Zoom where the respondent was comfortable and where the researcher was able to expand on any relevant issues raised.

A survey questionnaire was designed for the pilot research which would provide specific basic information that was quantitative in nature, whilst the main section consisted of a small range of qualitative questions that encouraged the respondents to provide their views and experiences (Silverman, 2017). Although this qualitative form of data collection is more complicated to analyse, it was felt that as a case study on the picture framing trade was being built, this would be a more appropriate form of question style. To analyse the answers from the open ended questions, they were coded (Strauss, 1987; Strauss and Corbin, 1990; Cowles and Nelson, 2019) using a manual system as there were only five respondents. Trends that emerged could then be identified – although Flick *et al* (2017) would argue that it's not data that's discovered, but rather phenomena that can then be interpreted as data. This data, or phenomena, could then be presented in a formal manner within the thesis.

The style of question used will depend on whether a quantitative or a qualitative result is required and, in this thesis, open ended questions were used in the main. However, careful consideration of the wording of such questions must be undertaken to avoid bias or lead respondents towards answers. Howle (1989, cited in Lydeard, 1996) states that a good research question should be important, interesting and answerable. Question styles that needed to be avoided were:

- Double barreled – e.g., How much education and training do you have?
- Halo effect – e.g., showing a positive attitude towards one supplier based on a singular event.
- Loaded – e.g., Do you agree that X company is better than Y company at supplying stock?
- Double negative - e.g., Are new products not easy to find unless you use their website?
- No comparator – e.g., asking the OMEs to compare the services offered by the leading supplier verses a small regional one.
- Complex vocabulary – bearing in mind the diverse levels of education amongst the OMEs.
- Jargon – not a major issue in this research as both the person asking the question, and the respondents were specialists in the trade.

(Developed from Rubenfeld, 2004)

3.2.1 - Why a case study?

A case study is a 'detailed study of a person, group, or thing, especially to show general principles' (Cambridge English Dictionary, 2021). Case studies are useful when investigating what is happening in the present to plan for future events, such as that used in Badach *et al's* (2020) research into urban development in two different cities, and when the main research questions are "how" or "why" (Yin, 2016) – hence, the case study created in this thesis will be examining what is currently happening within the picture framing trade in the North East of England in terms of business growth and survivability, focusing on the six main aims outlined in Section 2.9.

As already stated, there is no academic research regarding the picture framing trade, nor of other similar trades, especially in the North East of England. Therefore, the research philosophy needed to be considered carefully. The adoption of the use of a case study approach following a holistic multiple case design (Yin, 2012) may, in some researchers minds, be viewed as old fashioned and is sometimes accused of lacking enough depth from which to learn anything, but the decision to use a case study approach was considered appropriate in this instance due to the likely range of qualitative answers provided by respondents and which would require a broad sweep of the brush approach to analysis. As Harry F. Walcott (cited in Saldana, Leavy and Beretvas, 2011) said, you can learn "All you can" about that group or research target via a case study, a view also supported by Yin (2012 & 2016).

Guided by the ideology of grounded theory (Strauss and Corbin, 1990), this thesis seeks to explore the factors affecting decision making by the OMEs of picture framing businesses in the North East by generating rich data which is then collated and analysed to form the finished case study. Further studies can then be carried out in future that drill down deeper into specific areas of interest, possibly using different research philosophies where appropriate.

Traditionally, case studies are seen as qualitative research, although several authors have now demonstrated that case studies can utilize mixed method research effectively (Yin, 1984; Esteves & Pastor, 2004, cited in Taylor, Dossick and Garvin, 2011). However, in this research, the more traditional qualitative method will be used as explained previously in Section 3.2.

When carrying out a case study, it's important to establish burden of proof, to borrow a legal term (Taylor, Dossick and Garvin, 2011). The burden of proof has two important elements:

1. Burdon of going forward – are there enough sources of evidence with which to go forward with?
2. Burdon of persuasion – is the sample size large enough and relatable?

The research follows what Robert E. Stake calls a collective case study (Denzin, Lincoln, *et al*, 2000) approach due to the ability to isolate the businesses operating in the given geographic location and produce a descriptive analysis of views within the picture framing trade. This will allow the build-up of research data on these micro businesses which will then allow possible further research in other regions of the UK to build up a national picture at a later date and provide analytical data on which to compare the different regions.

It was also felt that the burden of proof was achievable as, with potentially over 80 individual businesses within the region to target, the researcher felt confident that the burden of going forward could be achieved and that the burden of persuasion could be provided from a sample size that was large enough and would be representative of the population.

One of the key things to consider when trying to prove the burden of persuasion is the size of the sample that you wish to achieve to represent the population and then use the appropriate method to collect the data. Face-to-face is most likely to produce the most results but can be time consuming and costly in terms of hourly wages if researchers are being employed, whilst postal is likely to give the fewest results unless the respondents can see some use or benefit to themselves (Lydeard, 1996a). But, 'there is no specific response rate that guarantees an unbiased representation of the population (Gordon D. Rubenfeld, 2004).

The target sample size in this thesis was 20% which was believed to be both achievable and would be representative of views across the picture framing trade, with the respondents coming from across the whole region to avoid any localised bias in the results. This is especially important for a region the size of the North East, as different local councils provide different levels of support to small businesses and there is a large disparity in disposable income levels across the region, which may affect the way entrepreneurs set up and run their businesses.

3.2.2 - Why were other methods dismissed?

The use of online surveys has increased over the last few years (Fogli and Herkenhoff, 2017) 'as they are a cost-effective alternative to traditional approaches of telephone or mailed surveys' (Tenforde, Sainani and Fredericson, 2010) - telephone surveys take time to carry out and require skilled interviewers which incurs a cost, whilst postal surveys have additional production and postage costs. Online surveys also allow the researcher to start, pause or stop the survey whenever they wish, as well as offering the ability to gain responses from a far greater geographic area than may be possible using other methods.

However, online surveys produce a challenge in terms of 'the sampling, response rate, non-respondent characteristics, maintenance of confidentiality, and ethical issues' (Nayak and Narayan, 2019). Cunningham *et al* (2015) have identified several problems with online surveys.

- The sample cannot be guaranteed to come from the target as anyone can open the survey link which may then lead research in the wrong direction,

- the response rate cannot be guaranteed,
- response rates have been found to be generally poor,
- non-respondents may have to be contacted to build up a picture of why they didn't respond and to avoid any potential bias, which may be time consuming if there are a large number,
- there are laws surrounding the confidentiality of information in most countries and researchers must ensure that they are adhered to, as well as identifying and dealing with any potential ethical issues such as the use of forced responses that don't allow the respondent to move on to the next question unless the present one is answered first.

Additionally, the ethical issue has become of paramount importance as people have become more aware of their rights within a digital age, and a rigorous ethics code is essential to build up trust amongst respondents and therefore gain valuable data (Evans and Mathur, 2018a).

Another issue which has come to light in recent years is the increased use of smart phones to do everything online. Having smaller screens means that researchers must ensure that the questions fit onto these smaller devices.

The use of an online survey in this research served no purpose as it is not focused enough on the picture framing trade in the North East. Additionally, there was no obvious way of easily maintaining this regional aspect without respondents bleeding out into other areas of the UK, or even into other countries.

Focus groups can be used effectively in surveys as they allow you to gather a lot of data from interested respondents in one or two sessions. However, they do require a professional to monitor the sessions as well as to collate the results to gain the maximum amount of data possible which incurs further costs.

Although a focus group would likely have made for interesting conversation, it was never considered a feasible option as there is no facility in the North East, nor anywhere else in the UK, where the picture framing population gathers (such as a trade show) at the time that the research was undertaken. Nor was there an opportunity to organise a focus group from FATG members as only four registered members of FATG, out of 85 known picture framing businesses in the North East, hail from the North East, and only one of them is a regular contributor in the monthly meetings. Therefore, it was felt by the researcher that this wasn't a sensible route to follow.

Another possible way to undertake the survey research would have been through the use of a workshop. Ørngreen and Levinsen (2017) defined this use of workshops as 'an arrangement whereby a group of people learn, acquire new knowledge, perform creative problem-solving, or innovate in relation to a domain-specific issue', and went on to explain that workshops can be used in three major ways;

1. to achieve a goal,
2. to practice, whereby something is created,

3. to conduct research which generates reliable and valid data by ‘providing a means for understanding complex work and knowledge processes that are supported by technology’.

In theory, the idea of using a workshop to gather data from picture framers is good; invite the OMEs of various picture framing businesses from across the region to get together, either in a central location or via the internet, and discuss issues such as the problems facing the trade, how to grow their business or what’s made them successful. However, there are four key issues about the use of a workshop.

The first problem is that of time – trying to organize a time and a day that is mutually suitable for everyone. Many picture-framing businesses run as sole traders with few, if any, employees - so to try and arrange a time that is suitable amongst all attendees of the workshop, who all have personal lives as well, would be extremely difficult.

Secondly, where to run the workshop? A geographically central location in the North-East would-be Gateshead/Sunderland. But would OMEs from the extremities of the region such as Berwick, Weardale or Redcar be willing to travel that far, particularly if they can’t see any advantage in the workshop for themselves? Plus, this central location may also incur a cost not just in travel, but for a venue. And who’s going to pay for that?

So, could the workshop be run via Teams, Skype or Zoom? The problem here is that not everyone is tech savvy, nor do they want to be – some owners may have moved to the trade as an early retirement choice and don’t wish to use technology, or even know how to use the technology. Other owners may run a lifestyle business where they can escape the hurly burly of business life and are happy not using technology.

The third issue is whether everyone will get their say, will they get a chance to air their views, or will it be dominated by a few? Picture framers are in general happy to help each other with advice on how to do things, but inevitably people who are newer to the trade may not feel comfortable giving their opinions in a group that also has people in it who have been framing for 20 years or more. Similarly, experienced framers may not take too kindly to ideas generated from newer entrants to the trade.

Picture framing businesses also operate in different markets, with some specializing in the top end of the market such as conservation framing or restoration, whilst others specialise in the lower end of the market where people just want a picture in a frame so that it looks nice and therefore cost is their primary driver. There are also bespoke framers who make one frame at a time and contract framers who make a batch at a lower cost. These differences can lead to some friction as bespoke framers may take offence due to the belief of the lower cost contract framers taking business away from them and not caring about the longevity of a piece of artwork.

The fourth issue is that of preserving personal data such as turnover figures. Competitors may not want each other to know how much or how little their sales figures are, so may not be willing to supply such data in a public forum such as a workshop or may inflate the figures or issues to look better or worse than they are.

It is for these reasons that a workshop was not used as a research method, preferring to talk to the OMEs on a personal level and thereby being able to gain trust and further insight where needed.

3.3 – Contextual research into the picture framing trade

With no academic sources on which to base the research being available, the researcher had to use trade sources to build up further background knowledge on the trade. These sources included the two main trade publications:

- Art + Framing Today – published quarterly by the FATG.
    - This magazine has articles of interest in picture framing, art and photographic businesses and is only available to FATG members.
    - It leans heavily towards conservation framing techniques, with a focus on the longevity and reversibility of artwork. Conservation techniques are time consuming, and the materials are generally more expensive, therefore only appealing to those framers operating at the middle to top end of the market.
    - Although this publication is independent, Larson Juhl regularly runs a competition in which the winner will be sponsored to complete the Guild Commended Framer (GCF) course which is run by the FATG.
    - Various art and framing suppliers advertise in the magazine.
- 4Walls – published by Larson Juhl on a quarterly basis, but only online since the beginning of the Covid 19 pandemic in 2020, so not particularly high profile within the trade.
    - This digital magazine is heavily biased towards Larson Juhl's products, for obvious reasons, and focuses on businesses that use their products, whilst observing good practice as laid out by the FATG.
    - No other suppliers advertise in the magazine.

These two publications supplied useful background information on areas such as design trends, the use of technology in the business and links to the advantages and disadvantages of recruiting younger or older employees. However, they were unable to supply much in the way of data on the trade in general.

Discussions were also undertaken informally with major figures from within the trade, one who runs his own training school for framers as well as a local trade counter and a gallery/framing business in the South of England; the other has worked for a number of mountboard companies and has travelled the world promoting his employers' products, including with UK Government organised trade missions. Issues discussed ranged from who amongst the stakeholders held the power, the problems that they and other framers faced whilst trying to grow their business and why they felt companies such as Fast Frame and Frame It ultimately failed as a franchise idea.

Other figures that the researcher regularly had informal discussions with are his contacts within his own suppliers, all which have been in the trade for many years, and the researcher's brother who has also been in the trade for over 30 years.

Seven representatives of wholesale suppliers to framers in the North East of England were also interviewed over the phone on topics such as

- the number of framers in the region,
- whether there's a future for framers,
- are they seeing more modern technology being utilised
- and the impact of Covid 19/Brexit/Economic slowdown in the UK.

As the questioning style was very open, discussions could lead to any number of areas concerning the trade, with relevant topics being picked up on in more detail by the researcher and recorded manually. This method of recording the interviews was chosen as some respondents were reluctant to be recorded. Therefore, the decision was made to standardise the recording method that they were all comfortable with.

All the representatives have worked in the picture framing trade for several years, ranging from 15 years up to over 30 years. Therefore, they have a wealth of experience and knowledge of dealing with picture framers of all sizes in the North East on which to draw their opinions.

This industry specific background research, coupled with the researcher's own knowledge of the trade, allowed for the completion of an in-depth analysis of the trade as a whole and which threw up several salient ideas which could be included in the main body of the research.

3.3.1 – PESTEL style analysis

A PESTEL style analysis was undertaken to help build up an image of the picture framing trade overall to help understand the environment that picture framers in the North East operate within. The PESTEL analysis would focus on five main areas:

Politically, there is very little direct intervention within the picture framing trade, but there was an impact caused due to government intervention during the Covid 19 pandemic as well as the effects of Brexit on the trade.

The economic element includes areas such as the UK economy, unemployment figures, average incomes by region and design trends. Thus, an image of the external influences that affect the trade could be built up and analysed.

With regards to design trends, discussions were held with a range of UK suppliers and framers globally, with the initial question posed being – 'What or who are the major stakeholders in the picture framing trade that we tend to follow?' The suppliers representatives were approached in person, whilst the framers opinions were gathered via four different online specialist forums:

- The Grumbler - a US based forum but with members all around the world.
- The Framers Forum – UK based.
- FATG forum - UK based although they do have over 200 international members.
- Framers Only on Facebook - an international forum but with a heavy bias towards US membership.

Poor responses were gained from the two UK based forums, whilst eager discussion was generated on the other two sites.

The social impact of topics such as the effect that digital natives have had on the industry, as well as the problem within the trade of having a lot of digital immigrants working within it are examined. Organisational fields are also to be examined to try and establish if any exist and to what degree they are successful. An examination using sociograms is also to be undertaken to look at the links that exist within the trade.

The technological element is to examine the effects that technology has had on manufacturing and customer demands.

An examination of the impact of conservation within the trade was also to be undertaken to establish who is driving it and whether it's having an impact on picture framers customer demands.

The legal aspect was not examined in any depth as no laws are specifically aimed at the picture framing trade and framing businesses, therefore they operate under the standard UK Health & Safety legislation, as do all UK businesses.

3.4 – Pilot research into micro businesses

To test the proposed methodology, a pilot survey was designed and carried out using a mixed method form of research, with quantitative data backing up qualitative data. 10 micro businesses were to be invited to take part in the research, with the researcher interviewing them personally, either face-to-face or via Skype/Zoom and recording the meeting for analysis later. This in-house method of investigation was chosen in order that the respondents could get far more comfortable and at ease being in their own environment, especially for those that were using Skype/Zoom for the first time. Although more time consuming, it allows the researcher to give more time for the respondents to theorise on their responses via further unscripted questioning, building up the reasoning behind their own decisions and thinking.

Questionnaire development

An inductive approach to the research was used that explored the data for trends to build the case study. The questionnaire was initially built up around question blocks (Appendices 3) as adapted by Venckuviene (2014) with reference to Stefanovic (2010) and Zimmerman and Chu (2013) to provide core generic information, with more targeted questions then being built around the question blocks.

The completed questionnaire (Appendices 4) consisted of 19 questions, with the first 11 essentially being closed questions which could easily be analysed using quantitative methods. These questions were general in their approach to establish the business entrepreneur's validity for inclusion in the research, as well as to help identify data such as level of education to check against the findings of other pieces of academic research. Questions 12 -19 were open questions designed to allow the respondents to give their opinions based on their own experiences, as well as to allow for question development if required.

Question 1 was about gender and was asked to ascertain if there were any trends regarding gender being raised.

Question 2 was about the respondents age, as the research of both Cressy (1996) and Yazdanfar & Ohman (2015) had highlighted age as a factor in success. The reasoning behind the age groupings were as follows.

25 or under – this group represents education leavers, usually made up of entrepreneurs with little or no experience of owning or running a business; nor do they have a lot of managerial experience. However, they do have access to additional advice and funding sources. They also often have the bravado of youth – not being afraid to fail as they've never really failed before, as well as sometimes introducing new ways of doing things through lateral thinking.

26–35 – this group represents young adults, possibly married with a family. Therefore, they may be more risk averse in terms of setting up a business as they require more financial stability. However, it may also be the category in which home businesses are established as an additional source of income, or as the main source of income but which allows flexibility around family life. Additional sources of finance and advice are also available depending on their age.

36–55 – this group represents the time of life where people are considered to have sorted out their career path and have gained experience of a job and/or management. Their earning potential is approaching its maximum and major investments such as mortgages are either well under way or are approaching their end. Therefore, starting a business could be a risky venture as entrepreneurs risk losing their home etc or, conversely, they are able to source alternative sources of finance relatively easily allowing them to establish a larger business or even take over an existing one.

56–68 - this group represents the final years of employment and the approach of retirement. These groups may have access to savings or be able to re-mortgage their property to set up or buy a business or may have been made redundant and have found it difficult to find employment due to their age.

- **69 or above** – this group represents the retired people who continue working either through necessity or the desire to stay busy.

Question 3 was about the highest level of education that the entrepreneurs possessed to test the ideas put forward by Coad *et al* (2013) that the level of education has very little to do with creating start-up growth.

Question 4 was concerned with how long the business had been running and which would test the ideas of Herbaine (2015) in the way that a business' age affects its ability to survive demand shocks.

Question 5 was seeking to establish the entrepreneurial backgrounds of the respondents in terms of whether they had set the business up, inherited it or bought it, therefore helping to establish the motivation behind their decision to become self-employed.

Questions 6 & 7 were asked to ascertain the size of the business in terms of the number of employees and to establish their turnover, therefore establishing that they were micro businesses by definition.

Questions 8 - 13 were designed to ascertain the level of prior experience that the respondents had within their field of work, thereby testing the ideas of Rosa & Scott (1999) and Barringer *et al* (2005).

Question 14 was asked to ascertain what their reasons were for setting up their business in the North East. This information was required to check if there was any migration out of or immigration into the region.

The first part of question 15 was included to establish the motivation behind setting their business up, therefore building up academic knowledge in this area. The answers were to be recorded via an answer gris that designed around the work of Venckuviene (2014). However, upon completion of the pilot research, it was felt that some adaptations were required in terms of some of the potential reasons for setting the business up, as alternative answers were thrown up that were not covered in the research undertaken by Venckuviene. The most notable of these were interest and fitting around family needs.

The next three sub-sections were all concerned with any barriers that they had encountered in the first three years of trading as, for the first three years, businesses are considered to be new businesses by many business support agencies and therefore different support may be available to overcome barriers. The questions relating to barriers linked to motivation as entrepreneurs need motivation to overcome barriers as they appear. Questions 15b and 15c were open questions allowing qualitative answers to be provided and which allowed the researcher to gain an insight into the level of support available to micro businesses in the region, therefore testing the ideas of various authors, whilst also establishing whether the entrepreneurs want to grow their business in any way and the reasoning behind their thinking.

Question 16 asked whether they do any form of formal business planning to test the findings of Bellamy *et al* (2019), Forth and Bryson (2019) and Faherty and Stephens (2016).

Question 17 asked whether the entrepreneurs used networking in any way within their business to test the findings of Baines & Wheelock (1998) and Chell & Baines (2000).

For question 18, they were asked whether technology had had an impact on the way they or competitors do things. The answers here would help to establish whether technology is having an impact on all businesses or whether it's mainly via use of personal computers (PCs) to ease the production of paperwork. It would also possibly open the discussion of cost regarding technology and whether this formed a barrier to growth or not.

The final question, number 19, was about what they felt were the most important factors in their success to date to see if there was any commonalities in this area.

3.4.1 – Usefulness of the pilot research

The pilot research was useful on two fronts – it allowed for the testing of the survey and provided some important results regarding the growth of micro businesses in the North East. The questionnaire was altered slightly during the pilot research phase to flow better, and further changes were identified that were required before the main research was undertaken, namely the change in methodological approach from a mixed research method to a qualitative one. This was due to the nature of the questionnaire in that the open-ended questions allowed for a wide range of in-depth answers that provided an opportunity for answers to flow between topics, and data such as experience to simply be expressed within these answers. If this type of data did not come to the fore then it could be asked as a development of another question. Further topics for discussion were also identified because of the PESTEL analysis on the picture framing trade in general.

A transcript of each interview was created, with the results being recorded in a table manually and then analysed using a thematic approach.

By carrying out the pilot survey, the researcher was able to continuously build on his knowledge, experience, and ideas to better formulate and refine the research methodology required for the main research element of this thesis.

3.5 – Research into North East picture framers

With 85 picture framing businesses identified in the North East of England in May 2021 via online research (Image 14), the researcher was able to map them out and identify their locations (Appendices 5-16). Unsurprisingly, most of them centred around the main population centres of Newcastle, Gateshead, Durham, Middlesbrough and Darlington. However, Northumberland is a large rural county which had a spread of framers in the likes of Berwick, Alnwick, Morpeth, Blyth and Hexham, but also in smaller more rural settings such as Prudhoe. This was also the case in County Durham where a single framer may serve a small market town such as Barnard Castle, or Guisborough in the Redcar and Cleveland district.

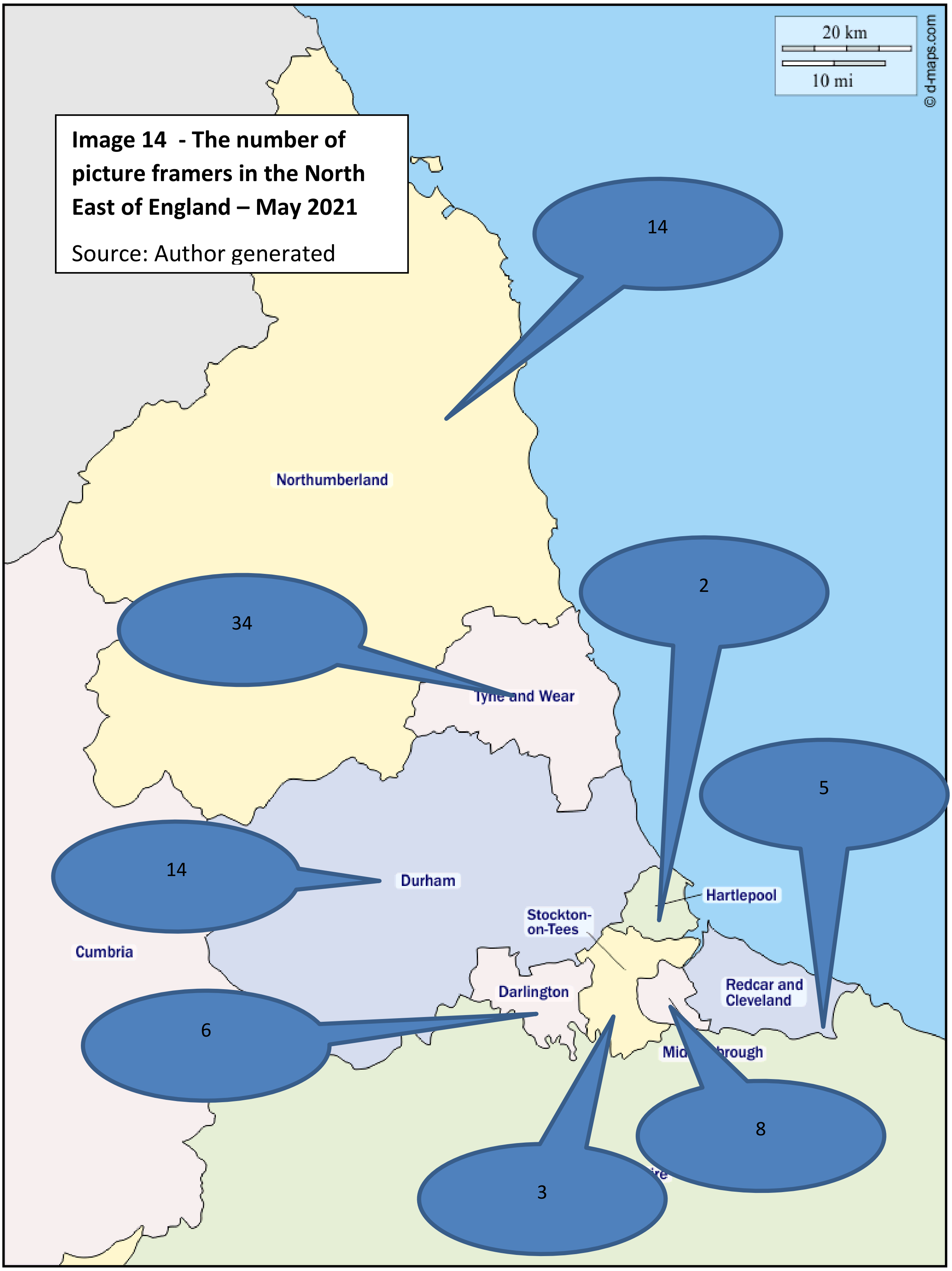


Image 14 - The number of picture framers in the North East of England – May 2021

Source: Author generated

The target market was across the counties of Northumberland and Durham, and the population centres of Newcastle Upon Tyne, North & South Tyneside, Sunderland (all which fall into the area on the map marked as Tyne & Wear), Hartlepool, Middlesbrough, Darlington, Redcar & Cleveland. The aim was to get a spread of results from across each of the areas to get an overall picture of what was happening, but also to ensure that areas of density were also represented in the results.

To these ends, the researcher initially targeted framers across the individual counties as a ratio of their representation in the region (Table 3). However, allowances were made in case the targeted respondents did not take part in the research for any reason, and so others would be approached to maintain the targeted number of respondents. By adopting this system, the research was essentially to be carried out using a quota sampling methodology.

Table 3 – Number of picture framers to interview

Source: Author generated

Region	Number of picture framers	Percentage of total (rounded up/down)	Minimum number of framers to interview
Northumberland	14	12	3
Newcastle	11	9.5	2
North Tyneside	6	5	1
South Tyneside	5	4.5	1
Sunderland	4	3.5	1
Gateshead	8	7	2
County Durham	14	12	3
Hartlepool	2	1.5	0
Stockton on Tees	3	2.5	1
Middlesbrough	8	7	2
Redcar & Cleveland	5	4.5	1
Darlington	6	5	1
		Total	18

Given that the challenges facing business in areas such as business support would be the same for all businesses in a local authority area (e.g., Newcastle or Middlesbrough), it was felt that targeting multiple businesses of similar sizes in one area would be a waste of resources. Therefore, by targeting a minimum response rate of 20% from across the North East region it would allow the researcher to talk to a range of entrepreneurs from a variety of locations. The researcher was very confident that the responses received would be accurate as by conducting the interviews face-to-face, he was able to gauge their responses in person.

This wariness of responses from respondents was highlighted by Baruch (1999) who reported that amongst the top journals, articles typically had a response rate of 40-60%. However, this figure only applied to questionnaires sent out to the rank-and-file members of staff; when CEO's and other senior managers were considered, the response rate dropped to 23-36%. Frohlich (2002) confirmed this figure, finding that response rates had plateaued in the mid-1990's at about 32% amongst managers and, if anything, is getting lower. These findings give an idea of the challenges of getting response rates from managers of larger businesses.

Research into family run businesses has been found to be different though. Wilson *et al* (2014, cited in Pielsticker and Hiebl, 2020) found that in family run businesses, family members are often unwilling to provide too much information on their businesses. They also point out that as research into family businesses is often targeted at the OMEs of the business (i.e. the senior managers) then, as already demonstrated in other research, the response rate is going to be lower. Indeed, Pielsticker and Hiebl (2020) concluded in their research that researchers will have to adjust their expectations on response rates when researching family run businesses, which will include many picture framing ventures.

These highlighted problems regarding the response rates in family run businesses are further amplified when considering that a large proportion of picture framing businesses are micro businesses that employ few, if any, staff and therefore find that time is of the essence. Therefore, it was felt that if the response rate was below 20%, which would reinforce the conclusions of Pielsticker & Hiebl (2020), further research from suppliers and other sources involved in the trade would be required to help build up the overall picture.

The preferred method of discussion was via face-to-face meetings as it was felt that the respondents would be far comfier within their own environments and that face-to-face allowed for a more personal approach from the researcher. It also allowed the researcher to get a feel for where their business was located and whether it was purely a framing business or if it had other aspects to it, both of which would allow the researcher to question them further on the reasons for their choices – it allowed the researcher to be improvisational (Denzin *et al*, 2000) in terms of gathering data, a factor which had been slightly missing during the pilot research due to the structure of the survey – namely that the qualitative questions came first and set the tone of the meeting.

The interviews were to be recorded and transcribed and then blocked into themed categories using Nvivo, the results of which would form the basis of the case study following an inductive process to identify any patterns or trends as they appear. This use of qualitative data analysis software enabled the researcher to organise the research findings in a far more detailed way as suggested by Seale (Silverman, 2017), with whole sections of text being able to be saved under the various theme headings for use in the analysis.

Before any research was undertaken, a complete review was carried out to cross reference the aims & objectives of the research against the literature review and the questions in the questionnaire (Appendix 19). This enabled the researcher to revisit these three key areas and ensure that the research findings would complement the research already undertaken and reported by other researchers, as well as to ensure that the aims and objectives could be achieved via the research method.

3.5.1 – General approach to and structure of thematic analysis undertaken in the main research

An attempt was made to contact all 85 picture framing businesses that were found to be listed on a range of sites on the internet (Table 4). The main method of contact was via e-mail or a phone call and took place between November 2022 and June 2023. On a couple of occasions the researcher resorted to cold calling on framers to see if this would be a successful way to approach them, but the response wasn't positive.

Table 4 – How framers were contacted

Region	Number of picture framers in the NE (as of May 2021)	Number of picture framers to be contacted by phone	Number of picture framers to be contacted by email	Number of picture framers to be contacted by other methods	Number of picture framers uncontactable	Number of picture framers who agreed to take part in the research
Northumberland	14	8	5	1		3
Newcastle	11	3	8			1
North Tyneside	6	5	1			0
South Tyneside	5	1	3	1		1
Sunderland	4	1	3			1
Gateshead	8	3	4	1		0
County Durham	16	7	8	1		1
Hartlepool	2	2	0			1
Stockton on Tees	5	3	2			1
Middlesbrough	3	2	1			1
Redcar & Cleveland	5	2	2		1	1
Darlington	6	5	1			1
Total	**85**	**42**	**38**	**4**	**1**	**12**

Of the respondents contacted by email, only one OME responded positively but it proved impossible to organise a time to meet him and eventually he stopped responding to the researchers efforts. Therefore, all 12 respondents that took part in the research were successfully approached via a telephone call. Two of the respondents were known to the researcher from past business contacts and were therefore quite happy to talk about their experience, whilst another one was known to the researcher through their membership of the FATG. The remaining nine respondents were quite happy to take part in the research once it had been explained what it was about, and the researcher had established his interest in the topic of study.

The results of the initial approach would seem to demonstrate the worth of personal contact with people, although of the ones that were cold called upon, one had shut down and the other had been contacted via email previously and wasn't interested in taking part. However, it did provide proof that the email had been received and read.

Of the picture framers contacted

- 5 email addresses were returned as non-existent,
- 11 of the phone numbers listed were not recognised,
- 1 phone number was a wrong number,
- there was no answer from a further 8.

It's unknown how many of these businesses have closed permanently, moved or changed their phone number/email address. However, it was established that at least one of the businesses with an unknown number was still trading, albeit on a part-time basis as the owner is on the verge of retirement, whilst another is known to have died resulting in the closure of the business.

This left 60 picture framing businesses that contact was made with. However, it is possible that not all the picture framers in the North East are classed as micro businesses as they may employ more than nine people, therefore a further 10% reduction was allowed for these businesses, leaving a figure of 54 micro businesses. With 12 of the owners agreeing to see the researcher (Table 5), this gave a response rate of 22% which is slightly below the figure suggested by Baruch (1999) but does reinforce the views of Pielsticker and Hiebl (2020).

Table 5 – Number of picture framers interviewed

Region	**Number of picture framers in the NE (as of May 2021)**	**Number of picture framers to be contacted by phone**	**Number of picture framers to be contacted by email**	**Number of picture framers to be contacted by other methods**
Northumberland	14	8	5	1
Newcastle	11	3	8	
North Tyneside	6	5	1	
South Tyneside	5	1	3	1
Sunderland	4	1	3	
Gateshead	8	3	4	1
County Durham	16	7	8	1
Hartlepool	2	2	0	
Stockton on Tees	5	3	2	
Middlesbrough	3	2	1	
Redcar & Cleveland	5	2	2	
Darlington	6	5	1	
Total	**85**	**41**	**38**	**4**

A good spread of businesses in terms of size and location was achieved, with some being passed down through generations of the same family, some being established a long time and others being relative new comers.

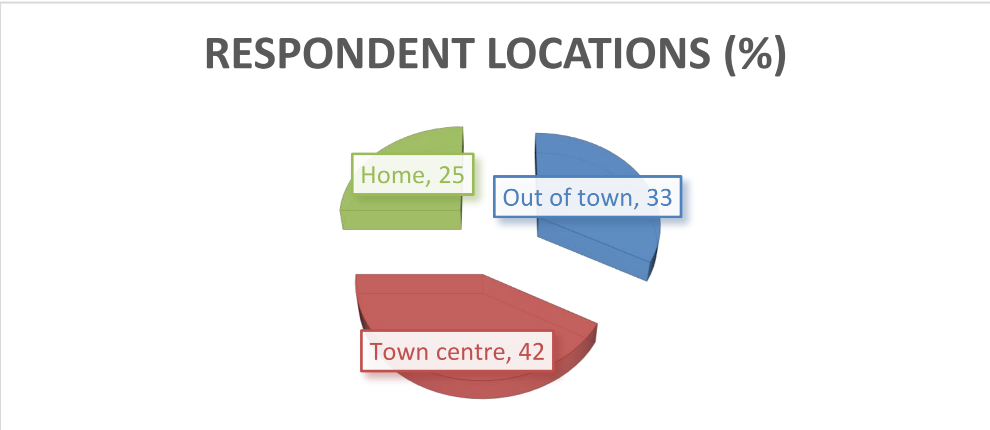
The picture framing businesses were categorised as either having a premises in the town centre (retail), out of town (factory) or operating from home (Table 6), with a good, relatively even spread achieved. These categories were chosen as these locations offer picture framing businesses different opportunities in terms of services offered.

Table 6 – Location of framers across the North East as a percentage

	Location of business		
	Out of town	**Town centre**	**Home based**
Number of framers by location	29	46	10
Number of framers by location as a % (rounded up/down)	34	54	12

The balance of respondents compared to the percentage breakdown of picture framers across the North East (Table 7) was good, especially the out-of-town picture framers but there was a slight imbalance between the town centre framers and the home framers. However, it wasn't such a large discrepancy that the results would be affected in any major way.

Table 7 – Location of respondents



3.5.2 – The use of thematic analysis

The analysis of qualitative data is a process that involves making sense of data from various sources which is then coded in such a way that themes and commonalities can easily be identified (Hsieh and Shannon, 2005). It can also help to identify interesting gaps in the data or points that seem extremely important to a small percentage of the respondents but not others. These anomalies can be just as important in understanding the big picture. It is essentially an attempt to create patterns and meanings (Patton, 2002 quoted in Daniel and Harland, 2017) from a range of diverse data sources.

For the purposes of this thesis, thematic analysis will be used as a qualitative method for analysing data gathered in both the pilot and main research, as popularised by Braun and Clarke (2006), with themes being created in Nvivo to help build an initial basis on which to build further analysis of the responses in a manual way. As Braun and Clarke later stated, thematic analysis 'is a technique or method for identifying and interpreting patterns of meaning (or 'themes') in qualitative data' (Clarke & Braun (Lyons *et al*, 2016)). Clarke, Braun & Hayfield (Smith *et al*, 2015) also stated that it is a method 'that uses a set of theoretically independent *tools* for analysing data', as opposed to a methodology which is a 'theoretically informed framework for research' such as that used in methodologies like grounded theory, discourse analysis or conversation analysis. The use of a thematic analysis method allowed for a more flexible approach to the research in terms of questioning and analysis and would also be utilised during the analysis of the pilot research, although due to the small number of respondents involved, a manual method of recording the findings was used as opposed to Nvivo.

Although analysis of data is often free of set conventions, the use of a two stage procedural approach, as suggested by Daniel and Harland (2017) and developed from the ideas of Braun & Clarke, has been adopted in this thesis. The first stage of this procedure is to read through the transcripts and create themes that relate to the key data found, with accompanying quotes. This is made far easier with the use of Nvivo 12 where nodes representing the themes can be created with no notice being paid to the order that they are created, and quotes then linked, especially if there are a lot of transcripts to be analysed. This development and adaptation of the coding system by one person does make it a Big Q thematic analysis method (Clarke & Braun (Lyons *et al*, 2016)). This coding system will require re-visiting throughout the recording of the interviews and the analysis.

The second stage will be axial coding where links between the node themes are created that show a relationship. A third stage can be implemented, if required, and is where selective coding can be carried out, paying more attention to a particular part of the research if it is of interest and requires further research. This three-phase coding system is highly congruent with grounded theory as any theories developed will be grounded in the data. Other authors such as Clarke & Braun (Lyons *et al*, 2016) talk about a six phase system with each of the phases matching up overall to the later ideas of Daniel and Harland (2017).

By using a thematic approach, which draws heavily on content analysis (Attride-Stirling, 2001, cited in Daniel and Harland, 2017), data analysis was enabled as the node themes were created during phase one of the coding system and were then analysed to find the most interesting points (Attride-Stirling, 1998). However, a deductive reasoning approach was also taken as the author already had a good idea of what the results were going to be, based on his own experience in the trade. As very little data exists within this field, latent thematic analysis techniques (Braun and Clarke, 2021), have been adopted as the nodes (themes) will be developed as the analysis goes along, again fitting in with the grounded theory methodology already adopted. However, as Braun & Clarke (2021) suggest, semantic analysis has not been ignored and will be used where appropriate.

Some theorists (Willig, 2013; Gibson & Brown, 2009 cited in Willig *et al*, 2017) argue that it's this very vagueness of a set approach to the coding system that stops thematic analysis from being a bona fide methodology, but rather a meta analytic technique. They do not argue against its usefulness, just simply that there is always some degree of thematic analysis regardless of the qualitative approach.

Establishing the themes of the research

The analytical technique of thematic analysis was built up around the aims and objectives of the research instrument, namely:

1. What, if any, are the growth drivers of picture framing businesses in the North East?
    a. What's their background? Experience, training, education? Is this important?
    b. How long have they been trading?
    c. What is their motivation?
    d. Do they plan to expand? If not, why?
2. Do North Eastern picture framing businesses carry out any strategic business planning to help growth/survival?
    a. When is planning, if any, undertaken?
    b. Has the planning been effective?
    c. What tools are used?
    d. As many picture framing businesses have both a retail and manufacturing element, have the changes in the retail sector had any impact on the business?
3. What business support have business owners found in the North East which could aid framing businesses growth/survival?
    a. Have the MSMEs used any form of business support in the past?
    b. What form of support did it take and was it useful?
    c. Do they plan to seek any support in future?
4. How have picture framers in the North East been able to source finance to both set up and grow their business?
    a. How did they finance their set up and growth?
    b. Has finance limited their growth potential in any way?

5. Is the picture framing trade innovative?
    a. Do framers and/or suppliers consider themselves to be cutting edge? Why?
    b. Do framers take advantage of aspects such as conservation or Forestry Stewardship Council (FSC) membership by suppliers in their advertising or sales pitch?
6. Do picture framers in the North East network to aid growth and/or develop skills?
    a. Are they active members of FATG or any other online forum? What's their reasoning for this?
    b. Do they work with other similar/different businesses to develop concepts?
7. Is there a future for bespoke picture framers in the North East of England?

By using this research instrument, the main themes were able to be built up and developed into 12 main themes (Image 15), each with sub-themes where appropriate.

3.6 – Ethical considerations

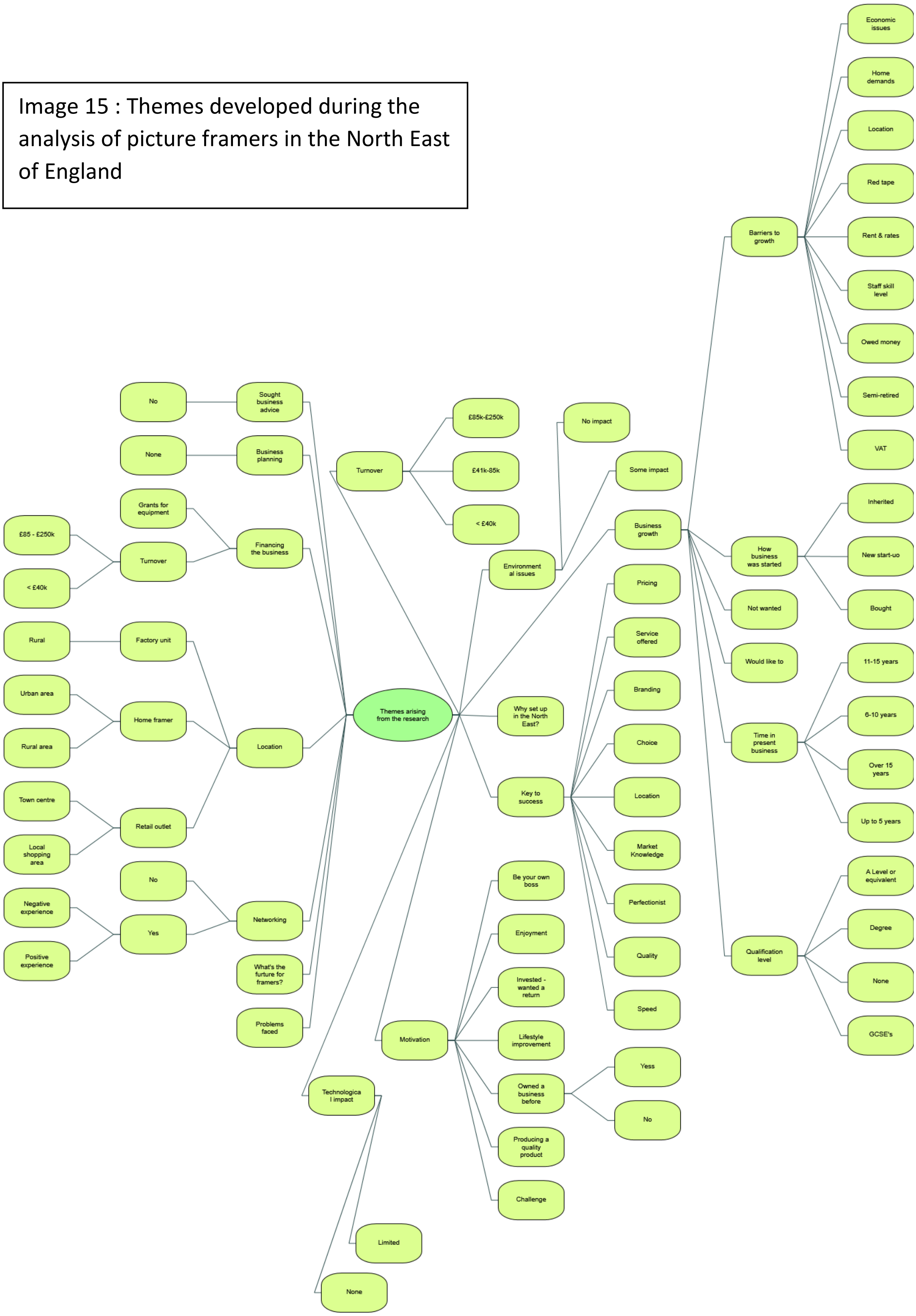
The British Economic and Social Research Council have produced a range of instructions for researchers to follow (Silverman, 2013) and which guided the research into this thesis. Ethical approval was gained through the University of Sunderland before any fieldwork was undertaken. In essence, because the research was going to involve close contact with respondents, they had 'to be fully informed, unharmed and guaranteed anonymity' (Silverman, 2017).

Business owners were contacted in advance by either e-mail or telephone to seek their permission to take part in this research (Denzin, Lincoln, *et al*, 2000), which was then clarified verbally when making the appointment. They were informed at the beginning of the interview what the purpose of the research was and were also informed that they could withdraw from the research at any point should they wish to.

With regards to confidentiality, no names were to be used in the thesis of either the OMEs interviewed, or their businesses unless they specifically gave me permission to do so. They were to be referred to as simply Business 1, 2, 3 etcetera or Supplier 1, 2, 3 etcetera. Recordings of the interview were made to ensure that a transcript could then be produced and that represented the true answers given. These recordings were stored safely on a personal computer and then were to be destroyed on completion of the thesis. The transcripts were to be kept for future reference.

No practical experiments or group testing was to take place, so no concerns were evident in this respect, neither was I to observe them without their prior knowledge thereby avoiding any accusations of deception.

Image 15 : Themes developed during the analysis of picture framers in the North East of England



One of the key areas that was focused on as an insider researcher was not to influence the answers in any way during the discussion, so as to be able to report the true picture as accurately as possible and therefore ensuring that what's reported is trustworthy, credible, and nonexploitative. Therefore all interviews were transcribed exactly as said, with only minor filtering of the findings such as stutters, extreme views such as character assassination or if the discussion went off topic. The avoidance of influence was a particularly challenging aspect of the research as the researcher has a personal connection to the research content in that he runs his own picture framing business, so will have gained his own views on the aspects being discussed. Operating what could be considered a competitive business by some respondents was relayed to them at the beginning of the interview to waylay any accusations of a conflict of interest and therefore maximise reflexivity.

According to Bonner and Tolhurst, 2002 (cited in Saidin, 2016) being an insider researcher provided three advantages to the research.

1. An insider will have a better understanding of the issue therefore the researcher was able to develop discussions using technical jargon that was beyond the knowledge of outsider researchers.
2. They are less likely to 'disrupt the flow of social interaction' (Saidin, 2016) with questions about building clarity due to the researchers knowledge.
3. They will be better at extracting true data from the participants due to their ability to relate well to the issue, therefore allowing the researcher in this case to delve deeper into industry specific topics and issues.

Smyth & Holian (2008, cited in Saidin, 2016) also point out that due to the insider researchers familiarity with 'the cultural and political structure of' in this case the industry, it saves 'time in trying to understand the issue being studied'. However, Bonner and Tolhurst (2002) also warn that insider researchers have to be careful not to reveal too much sensitive data during their research due to their closeness to the issue.

Lying on the opposite side of the argument is Simmel (1950, cited in Saidin, 2016) who argues that the researcher can only be truly objective if they are an outsider researcher with no prior knowledge or prejudices of the issue.

Having been a secondary teacher for 18 years prior to commencing the research, the researcher is experienced at distancing himself emotionally from the topic being discussed, so was able to utilise these skills effectively in maintaining a professional distance between his personal business interests and the research in hand. However, regardless of this career fact, as Robert E. Stake (Denzin *et al*, 2000) points out, it is accepted that no personal influences can ever be eradicated completely when carrying out a case study.

The bottom line is, ethical considerations need to be kept in mind during the survey interviews as well. Respondents need to be given respect both professionally and personally, should be allowed to ask any questions of their own, allow a settling in period at the beginning of the interview as well as a 'debrief' period at the end, making sure that all questions are clear and open, and ensuring that both the respondents and the researchers well-being is secure at all times (Lyons *et al*, 2016)

3.7 – Chapter 3 Review

In chapter three the methodological process that was used in the production of this thesis was outlined.

Chapter 3.1 examined the philosophical approach taken to the research, with an explanation of why the approach of an ontological realist had been adopted, as well as the epistemological position adopted. A discussion was also undertaken as to why the use of qualitative research was eventually adopted, with an explanation of why a mixed methodology was eventually rejected in favour of a more adaptive form of research.

Having explained why an explanatory survey would be used, it also established the reasons behind the adoption of a one group post-test only design philosophy following the writings of Vaus (2013). The whole research process would be based around the idea of constructivist grounded theory. A description of why a survey was chosen over other methods of research was then provided.

In Chapter 3.2 the adoption of an open question questionnaire was discussed with the advantages and disadvantages of the method highlighted. A subsection was then included that contained an explanation as to why a case study approach was taken over other research methods, followed by another sub-section that outlined why other ways of recording the findings were discarded.

Chapter 3.3 provided detail on where the research originated with regards to the picture framing trade, namely two trade magazines and people experienced in the trade, the author included. A summary of a PESTEL style analysis which was carried out based on the trade as a whole, was also included.

Chapter 3.4 was concerned with the pilot survey and explained the thinking behind it. The pilot survey involved the questioning of five micro businesses in the North East that were not associated with the picture framing trade to test and develop the questionnaire. Important changes to the questionnaire and the methodology to be used were identified during this pilot survey, along with some interesting points raised, namely the importance of customer service to micro businesses; the lack of desire to grow their businesses any further; push factors that had led to the establishment of their businesses; and a total lack of any meaningful networking.

Chapter 3.5 discussed the way that the target respondents were approached along with the format that discussions were to take place under.

Chapter 3.6 contained a description of the coding methodology to be used as per the ideas of authors such as Braun and Clarke (2006) who introduced the idea of thematic analysis.

Chapter 3.7 is concerned with the ethical aspects of the research and outlined the steps taken to ensure that all ethical considerations were addressed.

In Chapter 4 the thesis will report on context in terms of what's happening in the picture framing trade in general which will be provided via a PESTEL style analysis. This will include a look at who is determining designs, the impact of digital natives and the throwaway society, organisational fields within the trade along with a sociogram which demonstrates the complicated relations that exist within the trade, the impact that technology is having coupled with the demands of environmentalism.

Chapter 4 – What's happening in the picture framing trade in general?

Chapter 4 provides a study into the picture framing trade in general within the UK to help the reader to understand the main issues within the trade and which will affect picture framing businesses in the North East as well.

Chapter 4.1 will provide an overview of the picture framing trade based loosely around a PESTEL analysis, as this provided a focus on which to base the research. However, the legal aspect has not been covered in depth as there are no legal aspects that apply specifically to the picture framing trade - they are all covered by the UK's Health and Safety laws. This analysis analyses the effects on the trade of the UK Government's intervention during and after the Covid 19 pandemic as well as Brexit. An examination follows into where the trends within the trade are developed as well as the development of technology within the trade in terms of whether framers are digital natives or digital immigrants. An examination of organisational fields within the trade is undertaken as well as a look at the sociograms that exist, followed by an overview of how technology and conservationism has affected the trade.

4.1– Overview of the picture framing trade

In 1997, there were in the region of 130 picture framing businesses in the North East (Redfern, 1997). In 2021, this number was down to 85 or fewer. All suppliers agreed that there are fewer picture framers in the North East in 2023, and in the UK in general, than there was 30 years ago. It's not just a UK problem either, as the number of picture framing businesses in other developed economies have also fallen, with one framer reporting on The Grumbler, a 66% drop in framing businesses in his town in Montana (*Picture Framing a Growing or Shrinking Market!!!!!*, 2007), whilst The New York Times reported that there had been a drop in custom framing businesses in the USA from 28,000 at its peak, down to just 8,000 (Goltz, 2012).

Over the last 30 years, many of the wholesalers in the UK have also changed ownership or gone out of business. The large wholesalers of the early 1990's included (according to Supplier 1)

- the Magnolia Group which had 12 businesses under its umbrella, and Aquarti, all of which were taken over by Larson Juhl in the 1990's;
- D&J Simons – still trading but at a reduced level;
- Ashworth &Thompson which had five outlets across the UK and Ireland but are now down to two;
- Lion Picture Framing Supplies;

- Euro Mouldings (closed);
- Frinton Mouldings which was taken over by Wessex Pictures and then closed;
- Rose & Hollis
- Nielson.

There were also several smaller suppliers such as Phoenix Mouldings which have now gone, whilst others have set up and gone within that time span. Both Suppliers 1 and 7 believed that there will be further contraction of suppliers over the next few years due to the continuing reduction in the number of picture framers in the UK in general (Supplier 7). A new equilibrium point needs to be found.

In order to gain an understanding of the environment that picture framers in the North East operate within, a PESTEL style analysis was carried on the picture framing trade in general across the whole of the UK. Alongside the economic landscape of the UK that has already been highlighted in Chapters 1.1 and 1.2, these factors add to the complexity of the business environment that picture framing OMEs operate within and help to guide their strategic decisions.

The legal aspects of the PESTEL analysis were not considered important as there are no specific laws that apply directly to the picture framing trade. The OMEs simply operate under the standard Health & Safety laws that all businesses in the UK follow.

4.1.1 – Political

There is very little direct political involvement in the picture framing trade due to its small size, although there is some willingness to get the trade involved in export. Steve Burke, the UK based VP for Global Sales at Larson Juhl (which is an American based multi-national) took part in the Department of International Trade & Saudi British Joint Business Council Technology & Smart Cities Trade Mission to Saudi Arabia in October 2019, where he was looking to cement further partnerships in terms of supplying moulding to large picture framing companies in the Middle East.

This willingness to try and help to build these international ties was also demonstrated by the funding that was on offer for UK SMEs to help them exhibit at the Maison et Objet 2023 exhibition in Paris (*Art + Framing Today*, 2022), which is a major trade show covering ‘13 sectors, including art, decorations and home accessories, lifestyle products, interior design and gifts.’ As micro businesses fall into the SME category, they are entitled to apply for this funding, but the reality is, how many bespoke picture framing businesses operate in the export market when most countries have their own picture framing trade, drawing on supplies from the same sources as the UK framers? This sort of funding is only likely to be of interest to one of the larger contract framing businesses if they export, not North Eastern bespoke picture framers.

4.1.2 - Economic

Another more important external dimension came to light in 2020 with the locking down of countries during the Covid 19 pandemic. As most picture moulding is made in countries other than the UK, along with equipment such as that from Valiani, Brevetti or Fletcher, the lockdown caused problems in the supply chain leading to shortages of some mouldings and delays in getting equipment, and which were still ongoing in July 2022. A lead time of at least three months for some new equipment that the researcher enquired about in June 2020 was quoted by one UK supplier, and that was 'being optimistic'. Other stock and equipment that is made in Asia got held up badly as it travelled around the world getting delayed in various ports along the way depending on the severity of the pandemic in different countries.

With containers being stuck in ports, a shortage of them was created which caused the cost of shipping to increase dramatically, with The Guardian reporting that the price for a container from Asia to the UK increasing to $10,000 for a 40 foot container for the first time ever (Ambrose, 2021a). Further delays in the supply chain were also caused by the cargo ship Ever Given blocking the Suez Canal on March 23rd 2021 for six days (Diaz and Neuman, 2021a), with their report on NPR demonstrating the massive delays that shipping companies were still trying to catch up with two months later. It's a problem created by globalisation.

As a result of all these delays, picture framing suppliers in the UK ran out of glass at the end of May 2021, as no glass used in the trade is now manufactured in the UK. This situation repeated itself again later in the year. This led to some suppliers increasing their prices by 25% (Centrado) after the first shortage, and further increases in price occurred again after the second shortage, with the researchers own business finding that the cost of one sheet of float glass had increased from £4.99 + VAT pre pandemic to £8.25 + VAT by April 2022. By June 2023, some suppliers were charging as much as £10.73 + VAT for a single sheet of 2mm float glass (*2mm Float Glass*, no date). That's an increase of over 100% on pre-Covid prices. With shortages occurring, Supplier 4 reported that larger framing businesses that had plenty of room to store items, tried to bulk buy glass to try and keep on trading, shopping around different suppliers that they didn't usually use. This left smaller picture framing businesses with a severe problem as they entered June 2021 as they couldn't source glass to complete work and therefore maintain an income, as well as a problem for glass wholesalers such as Wessex Pictures Ltd who were being approached by large new customers for bulk orders, whilst also wanting to ensure that their regular customers, many of whom are micro businesses, still had access to glass supplies.

Supplier 1 stated that because of these shortages, many UK based wholesalers have reduced their reliance on Chinese manufacturers, switching to Eastern European manufacturers for stock such as wooden moulding. In some cases, this move has been forced on to the wholesalers as, according to Supplier 2, some manufacturers in China closed for good during the Covid 19 pandemic. Supplier 5 also informed me during the pandemic that some of the Italian manufacturers had also closed – again not always to reopen. This switch in focus away from Asia has provided the benefit of a shortened wait time on stock from 6-12 months down to one or two months. It also means that the wholesalers can order smaller quantities more regularly, with Supplier 5 adding that it also allowed them to streamline their range and focus on good sellers rather than, in the case of new lines, having to buy a whole range of designs in different colours and sizes in the hope that they would sell, and to fill up a container.

Supplier 5 also talked about the increase in delivery costs that they have faced since the start of the Covid 19 pandemic. Haulage carriers have now introduced a sur-charge for deliveries to 'difficult to get to areas' such as the Highlands and Islands of Scotland, Cornwall and London. This last one was a surprise to the researcher, but on reflection there are now congestion charges in place across London which increases carriers costs, as well as severe congestion at times, which limits the number of deliveries a driver can make. They have also introduced surcharges to some private residential addresses where road access is difficult and/or time consuming. These surcharges will have a possible impact on some home framers, those in rural locations on the outer edges of the UK, and those in London.

Brexit has also had an impact on the picture framing trade. Supplier 5 stated that as of 2022, they now must pay in the region of £50-60 for each consignment imported, and that the exporting company also had a similar cost for exporting to the UK. As Supplier 5 is dealing with multiple manufacturers, these import/export increases have had a detrimental impact on their costs, some of which they've had to pass on to their customers, highlighting the view of Supplier 7 that customers have lost out via European manufacturers. There has also been an increase in the amount of paperwork that suppliers have to fill out when importing goods as reported in The Guardian (Stewart, 2022), which has also had a knock-on effect on time scales for some deliveries as well as some increased administration costs (*'Clear increase in costs, paperwork and border delays' for UK business since Brexit not helped by repeated delays to new import regime - Committees - UK Parliament*, 2022). On top of these issues, Euractiv reported that as of February 2024, 'full documentary checks and physical and identity checks at the border' (Fox, 2023) are to be carried out by customs officials, with delays being predicted by a BBC report (Hooker, 2022) unless the UK Government employs sufficient staff to carry out these checks.

The third element that's affecting wholesale suppliers across the UK, and was mentioned by Supplier 5, is inflation. As mentioned in Section 5.1, businesses have seen an increase in energy costs of more than 100%, thereby raising the running costs of wholesalers. This is on top of any wage demands that staff may have raised due to the increase in the cost of living. However, Supplier 6 stated that the economic downturn hasn't really affected their business in terms of the regularity of orders, it's just that their customers (the framers) do not have a large backlog of work on which to fall back onto. The work that they are receiving is the work that's getting done quicker than usual, which is ensuring that orders for moulding etcetera keep coming in on a weekly basis.

So, have all of these factors that helped contribute to a fall in GDP and an increase in the cost of living been felt within the picture framing trade, especially as it's a discretionary spend industry in which buyers find it very easy to delay their purchases until such a time as they feel more comfortable spending money? From a personal viewpoint yes and no. The sales output for the researchers own business for 2020 was slightly lower than it was in 2019 by about 9%. However, when you consider that the business was closed for three months during 2020 due to government enforced lockdowns and there was a tail off in March as people began to get very concerned about the virus situation, the fact that the monthly average sales (for the months that the business was actually open to trade) increased by just under 10%, would suggest that this business did not feel the impact as of the end of November 2020 (the end of its financial year). The impact of forced closure during the pandemic was softened by the payment of grants to small businesses such as picture framers to cover the loss of business in the first, second and third lockdowns, whilst larger businesses were able to make use of the furlough scheme. Sales figures for 2021 also returned to post pandemic levels with 2022 recording the highest turnover figures yet recorded and was in the region of £2,500 (7%) up on pre-pandemic end of year figures.

However, these increased turnover figures are tempered by the increase in costs of just about all raw materials which have had to be passed on to customers, along with electricity price increases and soaring diesel costs which have eaten away at the increased turnover very rapidly, resulting in figures that represent similar income levels from fewer customers.

Many people took the opportunity of being at home for an extended period, whilst being paid, to re-decorate and tidy up their homes, and the researchers business found that after the first lockdown it had a lot of work coming in as a result of this tidying up (pictures bought several years ago but then stored 'under the bed' and forgotten about), and after the second lockdown there was a three week frenzy of activity in the run up to Christmas. Many other picture framers around the UK also expressed their surprise at being as busy as ever during the FATG Zoom meeting in October 2020, of which the researcher was part of. Larger framing businesses that have been able to operate online effectively have also seen brisk trade, although those that specialised in supplying the leisure industry (pub refits etc) have found it an incredibly tough period.

Steve McDonald, who runs All About Framing and the UK School of Framing at High Wycombe in Hampshire, stated in November 2020 that the education side of the business had disappeared over night due to social distancing requirements and that they'd had to try and re-launch it as an online training course instead. This limited what they could offer in the way of training as many of their 'trainees' didn't have the same level of equipment on hand that the school had. He reported that although they'd had some take up of courses, it's nowhere near what their normal level would have been. This is just one training school within the picture framing trade but has demonstrated the effect that all training schools will have felt.

All these factors are pushing up the cost of framing materials, leaving business owners to decide on whether they can carry the costs or if they are to pass them on to the consumer, making what some consider an already expensive item even more costly.

4.1.3 – Social

Trend led designs

Most businesses would probably subscribe to the mantra of 'The customer is always king', thereby seeking to please what can be considered their most important stakeholder group (Doyle and Stern, 2006). However, is it the customer that determines what goes on to the sample wall? Is it the framer? The supplier? Or any other organisation? By establishing where the leaders are, it will be easier to try to establish why some framers operate the way they do.

Fashion affects the framing industry a lot due to its reliance on changing design philosophies. This trend led approach was confirmed by asking six wholesale suppliers in the UK and picture framers from around the world via online forums, one simple question - 'What or who are the major stakeholders in the picture framing trade that we tend to follow?'. The results of this quick poll were:

- Wholesale suppliers - all responded unanimously that the trade is design led, with their new ranges of mouldings being designed around what the current interior fashion designs are.
- Picture framers - of the 29 respondents that I had (mainly from the Grumbler and Framers Only)
    - Customer = 10
        - As they make the final decision on the frame/mount/glass choice.
    - Interior designers or home décor magazines = 8
        - As this is where customers get their ideas from.
    - Manufacturers/wholesaler = 6
        - As they are the ones that provided the frame shops with the ranges.
    - Picture framers = 5
        - As they control the market via the advice given to customers which leads to sales.

Those respondents that said that customers held the power were asked why they felt this and unanimously it was because without customers, none of the trade would exist. They were then asked about where they thought that the customer, or end user, got their ideas from? Most of them weren't sure but guessed that it probably stemmed from home décor magazines or TV programmes, or even interior designers that are working in the consumers' homes. Therefore, over 60% of respondents agreed that the trade is design led.

Interior designers themselves are also dependent on finding out what the future colour trends are going to be. These colour trends are led by three organisations,

- Toyo Colour Finder in Japan, which is a colour swatch produced by Toyo Inks,
- HKS Guide in Germany, which is another colour swatch,
- Pantone in America who's recognised as the market leader in colour trends.

Pantone's colour of the year for the following year is eagerly awaited by designers in December of each year. The colour of the year for 2021 was Ultimate Grey and Illumination (a bright yellow) which represented *'A marriage of colour conveying a message of strength and hopefulness that is both enduring and uplifting'* (Pantone, no date c). *In* 2020 it was Classic Blue ('Pantone Colour of the Year 2020', 2020) and in 2019 it was Living Coral (Heath, 2018).

Pantone's choice of colour is based on their own research on colour trends in areas such as global society trends and culture, which are their primary sources of information. They also draw their research from other diverse areas such as the entertainment industry, films in production, art collections, new up and coming artists, lifestyles, play styles and socio-economic conditions.

Pantone's colour of the year influences the manufacturers of moulding and mountboard as they review and adapt their ranges to suite these differing trends. However, not all trends come and go quickly. Having been involved in the trade for over 30 years on and off, the researcher can confirm that some moulding designs are the same as the ones that were around when he first joined the trade, such as a 10 or 20cm flat black or flat white, whilst other designs have come and gone within 18 months or so depending on the design tastes of the time.

Digital natives and the throwaway society

Digital natives is a term first used by Mark Prensky in 2001 (Halton, 2019) and are people born after 1980 that have grown up surrounded by, and using, technology – generally, they tend to understand it better. This awareness of technology has been crucial during the Covid 19 pandemic as people, many of them digital natives who are aged under 40, have been able to continue to work from home using communications software such as Zoom or Teams to stay in contact with colleagues and customers, order their shopping online, and communicate with loved ones through video chat facilities. These digital natives have, in many cases, also helped digital immigrants - people that were born before 1980 and have had to learn and adapt to technology, to make the most of technology during the pandemic. Figures from the ONS show that online retail sales soared from February 2020, with the exception of clothing which fell (Dalgleish, 2020a) and that in general, those levels of online sales remained higher than they were in February, particularly food sales which now accounts for about 10% of the market.

But are digital natives important to the picture framing trade? In terms of customers, yes, as they are within the demographic that is most likely to require the skills of a bespoke picture framer and will also be coming to the highest point of their earning potential so can afford it. But do people buy framing online? Of the 85 picture framers in the North East, only 39 of them have a website and none of them offer an online bespoke service. Companies elsewhere in the UK do offer this service such as easyframe.com however, their frame range is limited and is of an unknown quality to the researcher. Only 41 framers advertise an email address, again possibly showing a reluctance to use the technology available. This raised further questions as to why haven't bespoke picture framers taken advantage of this market? Is it that they are digital immigrants or is it that the technology isn't there to do the job properly? Is it a combination of these factors?

The throwaway society - a society full of excessive consumption and waste of food, products, etc. (*The throwaway society definition and meaning | Collins English Dictionary*, no date a) consists of consumers that, since the 1950's in America, have disposed of items after a short time of use rather than having the 'mend and make do' attitude of their parents' generation. This includes meals, clothing and furniture.

With regards to the picture framing trade in the UK, the likes of Ikea or B&Q have, since the mid-2000's, taken advantage of the throwaway society by buying in imported ready stretched canvas pictures which killed the framing trade according to Supplier 1, as suddenly no one needed frames or glass. They have also been buying in ready-made picture frames from suppliers in the likes of China . According to Steve Burke of Larson Juhl, large UK framers have stopped trying to compete with the Far East for this type of contract as they found it an impossible task due to the higher costs in the UK and the power that these large retailers wielded when paying for goods (or not paying) that they'd ordered – a problem faced by the suppliers of New Look during the Covid 19 pandemic when they suspended all payments to their suppliers and told them that they could come and pick up their goods if they wanted (*New Look suspends payments to suppliers for existing stock 'indefinitely' - Business & Human Rights Resource Centre*, 2020). He believes that the power has now switched to the Far Eastern suppliers as, if B&Q etc refuse to pay for their goods, the manufacturers will simply not supply them any more stock in future as they are not beholding to the UK retailer the same way that the UK framers used to be.

These throw away frames and canvases allow consumers to change their home décor on a more regular basis than their parents/grandparents had done, as they pay a far lower price for these mass-produced frames and pictures than they would at a bespoke picture framer. Yes, their quality maybe lower. Yes, they are not as durable. But that doesn't matter if it's easily replaceable or if they are buying on a tight budget.

Organisational fields

Organisational fields (or networks) have been defined as

> *'sets of organizations that, in the aggregate, constitute a recognized area of institutional life; key suppliers, resource and product consumers, regulatory agencies, and other organizations that produce similar services or products.' (DiMaggio and Powell, 1983)*

Wittington (2020) simplifies this idea, suggesting that it is basically about organisations meeting or discussing issues of mutual interest outside of the business environment. Within the picture framing trade these meetings do appear few in the UK, with the best example possible being the annual Spring Fair held at the NEC in Birmingham. This event used to be the highlight of the year with all the major suppliers attending the three-day event to showcase their new products and talk about the trade in general both to each other and with their customers. However, although the event does still happen, the picture framing element has shrunk considerably with just four art based companies and one readymade frame company taking part in the 2022 event (*Exhibitors*, no date). None of the major suppliers took part in it. Part of this change has been put down to the internet as suppliers can now notify framers directly of new or changed products rather than waiting for the annual event, but digital immigrants such as Business 12 lament the loss of the Spring Show as they enjoyed the face-to-face interaction of the event.

Other examples of organisational fields within the picture framing trade could be the FATG meetings where various aspects of the trade are discussed amongst members. But again, these 'regional' meetings have also waned in recent years with only the ones in the South East and Northern Ireland remaining active over time. A Northern Group was launched in May 2021, and which was led by a framer in Darlington with support from the author of this thesis. The Southern and Northern branches were holding meetings on alternate months (via Zoom) and all members were able to attend these meeting regardless of where they were based. However, this coalition of Northern and Southern branches collapsed by the end of 2021, with the researcher leaving the guild and the Darlington framer wanting to do the same in 2022. Both OMEs have stated their reasons for their departure from the FATG as poor value for money.

The FATG are well supported by suppliers such as Larson Juhl who contribute to the quarterly magazine as well as provide support via funded training through the FATG to become a GCF, or Wessex Pictures who have organised UK road shows in the past. Discussion forums were a regular aspect of some of the road shows and included members from all parts of the trade. The Covid 19 pandemic ended these trade shows and, as of May 2023, there are no signs of them returning.

For picture framers, important organisation fields are the likes of The Grumbler which is a US based discussion forum for trade members and Framers Only which is an International Facebook page. Although these two sources are well supported by members and seem to have a growing number of framers joining them from around the world, they are still North American based and so discussions regarding suppliers are often of no use to UK based framers or those in other countries. The Framers Forum is a UK based discussion site that allows UK framers to ask questions or sell/buy items, but the membership is far fewer than the two in America and appears to be dominated by several members. The FATG forum appears to be the smallest of them all and is focused on helping framers develop their skills when faced with a new technique that they've never used before, rather than general chat.

Working as a picture framer can be a lonely profession as many framers are sole traders working on their own, therefore limiting how they perceive ways to do a job. Therefore, forums form an important central hub position when faced with framing techniques that they haven't come across before and need answers to.

Sociograms

As defined by Chandler and Munday (2020), a sociogram is 'A diagram representing the various links between individuals or groups in a social network (such as a friendship network), and whether these are reciprocal or nonreciprocal relationships'.

If we consider the use of a sociogram within the framing trade, we can start to build a picture of who the movers and shakers in the trade are.

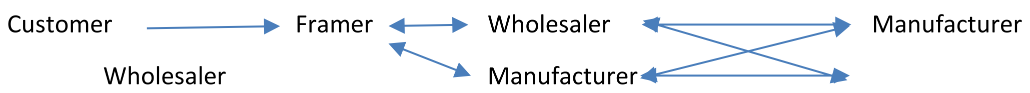
Broker positions are often held by the suppliers as they are the 'middlemen' between the manufacturers and the picture framers, and an important communicative role in letting manufacturers know what picture framers are requesting in terms of colour or design, whilst providing an outlet to picture framers of the manufacturer's products.

The suppliers are often an important source of finding alternative products for picture framers as well, as they often supply to other trades and can advise their customers on where to source unique or better products.

When it comes to the network density, it's the suppliers that have the contacts, although individual framers that have been in the trade many years will know where to source requested items. This is where the use of online forums has become very useful for framers, both for their learning of new techniques and alternate ways to do something or source materials that are out of the ordinary for themselves.

In theory, a sociogram for a picture framer should be quite simple with the wholesaler being the one with the most network density (Image 16).

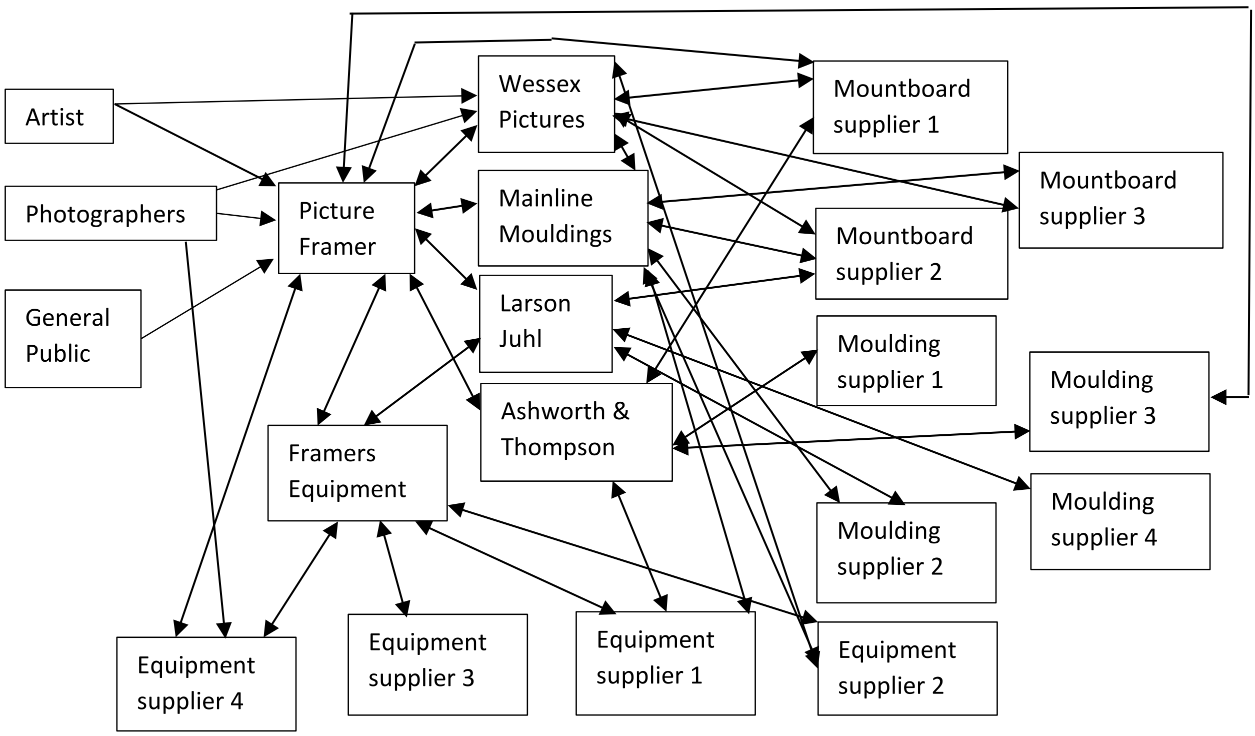
Image 16 – Theoretical sociogram for a picture framer



But the reality is that it's a far more complicated situation as the customers are made up from the general public, artists, photographers and other businesses, who don't necessarily have to go via the picture framer, they could go direct to the wholesaler for what they want. The picture framer in turn doesn't have to go to the wholesaler either, as the larger ones can go direct to the manufacturer if they are buying in bulk or are purchasing equipment. The wholesale situation is also complicated as many of them buy off each other, so for example, Wessex Pictures buy the Polcore range from Mainline Mouldings, who are also their competitor. Similarly, Larson Juhl direct equipment enquiries to Framers Equipment and Framers Equipment buy moulding and mountboard for resale to framers from Larson Juhl. Many of the wholesalers may also use the same manufacturer for a range of mouldings whilst others such as Larson Juhl are also manufacturers. The mountboard manufacturers may wish to purchase equipment from the likes of Keen Cut or Gunnar as they make mount cutters, whilst the moulding manufacturers may purchase equipment from Fletcher Terry or Morsø – there is no simple supply chain. So, a sociogram may look something like, or even more complicated, as the one in Image 17.

Image 17 – Proposed sociogram for the picture framing trade

Source: Author created



The theory holds that the more connections that exist, the better the network density. So, in this respect it does suggest that the framing trade in general has a very high network density as it's so interlinked across all points in the supply chain. However, trying to identify the central hub position is extremely difficult as there isn't any real central company within the trade that takes the lead. Therefore, you need to look at each of the hub positions to try and identify how they affect power (designers, Pantone?), innovativeness (equipment suppliers, framers?) and overall effectiveness (suppliers, wholesalers?), but again it is very difficult due to the homogeneity of the products and services produced in terms of meeting environmental standards and general expectations in quality. For example, most mountboard is now produced to conservation standard, even if it isn't called a conservation board, as laid down by the likes of the FATG regardless of the manufacturer, whilst moulding cutters must meet or exceed the standard achieved by the Morsø if they are to sell, as it has become the industry standard level of cutting.

To an extent, the FATG hold a central hub position within the industry as they lay down the guidelines for the five levels of environmental framing (to become four by 2024), as well as setting exams for framers that wish to qualify as a GCF, but other organisations such as the UK School of Framing also exist to provide training and examinations, and which are not linked to the FATG in any other way than perhaps membership. It is not a requirement for framers to sit any of these exams before setting up their own business, nor are the guild guidelines a set of 'must do' instructions. So, although the FATG spend time and resources investigating good practice within the trade, it's purely up to picture framers themselves on whether they want to follow these guidelines. Added to this is the poor percentage of FATG members compared to picture framing businesses which is below 5% in the North East, and it becomes evident that the FATG has a weak position as a hub in terms of controlling what picture framers do.

An accusation levelled at the FATG by Suppliers 2, 3 & 6 is that they don't do enough advertising outside of the trade, therefore the public don't know anything about them or their role in the picture framing trade. Supplier 6 likened them to possibly operating like ABTA in the travel industry and becoming a sign of quality in the general public's eye, but are nowhere near that level of control yet, nor do they appear to be moving in that direction.

4.1.4 – Technological

Technology does not change rapidly in the picture framing industry, especially at the bespoke level. Automated framing equipment is available from suppliers such as Yiwu Taisheng Decorated Materials Limited (*Yiwu Taisheng Decoration Material Limited -- Professional framing supplier from China*, no date) which demonstrates the technological developments available in the trade but is only of use to large scale contract framers. UK bespoke framers would not see any benefit in using this technology as it is designed for mass production, not job production, which is the mainstay of manufacture in most bespoke framers.

The industry standard level, in the UK, of cutting mitres in the wood is that achieved by the Morsø which works like a guillotine, and whose original design dates to 1911 (Image 18). Chop saws, which use a rotating blade to cut the wood, were invented in 1964 ('Miter saw', 2021a) and were developed over the following years to cut with either a single blade that adjusts to different angles, or twin blades set at a 45 degree angle to each other. They must, however, meet or exceed the cut achieved by the Morsø if they are to be used successfully. They do allow for faster cutting of moulding and have been adopted my many framers in the trade, especially the larger companies that produce a lot of frames, but they create far more noise and dust than a guillotine type machine and require extraction systems to meet Health and Safety regulations. This noise and dust problem often deters smaller picture framing businesses from using them as they often use the same space for both manufacturing and sales, therefore preferring to use a guillotine style machine instead.

Adaptations such as improved safety devices have been made to both the guillotine and chop saws over the years, but they are essentially the same design as when they first appeared.

Image 18 - Morsø guillotines then and now	
Morsø pre 1959 before they changed the colour, body style and pedal layout.  Source: www.classifieds.ksl.com	Morsø 2021, still using the same basic design as that from the late 1950's and the same mechanical systems as the original.  Source: www.Morsø -guillotines.dk

Similarly, joining frames hasn't changed in any major way since 1976 when Antione Cassesse invented the V nail which is inserted beneath the frame via a cartridge system (Image 19), and an underpinner to deliver the nails. As with cutting wood, adaptations have been made such as the introduction of pneumatic versions in the 1980's, but no major innovation since.

Image 19 – Cassese V-nail pre-loaded cartridges

Source: www.mouldingrep.com

The only real innovation in the last 35 years is the introduction of computerized mount cutters (CMCs) in 1993. These mountcutters allow the framer to design the mount via a computer screen and mix and match different shapes within their designs as needed (Image 20). It also allows the framer to produce multiple mounts very quickly compared to cutting them by hand, but they are still prohibitively expensive, starting at £17,000 + VAT (*Framing Equipment - Machinery & Accessories - Valiani Machinery - Mainline Mouldings*, no date) compared to £1,550 + VAT (*Keencut Ultimat Futura Straight Line Mountcutter*, no date) for a more traditional style of hand cutter, the basic design of which has been around since the 1960's. Even used CMCs still command prices in the region of £8,000.

Image 20 - Gunnar AiOX CMC

Source: ironbridgeframing.co.uk

Increasingly powerful point of sale (POS) systems such as FramR (*Picture framing pricing software, Software for Picture Framers, Pricing calculator for picture framers*, no date) that help to calculate the price of framing jobs have also seen increased usage over the last 15 years or so. These POS systems are often linked to the main suppliers so that prices are kept up to date, saving framers time, but incurring a cost element that paper-based systems never had.

Regarding other equipment, no major changes have occurred since their inception in the 1970’s-80’s other than adaptations as mentioned above.

Where consumables are concerned, the use of finger joints in the manufacture of picture moulding has helped to reduce wastage as they can be manufactured to a set length, as opposed to the length of the timber in the first place. This not only saves time for the picture framer when calculating how much is needed, but also helps the environment as wastage in the manufacturing process is reduced. However, not all moulding designs can take advantage of finger jointing – on unfinished, or natural ones, the joint would be visible on the face of the moulding and therefore useless to a framer.

Although finger jointing has reduced the amount of waste in the manufacturing process, it has also introduced a weak point in the length of moulding (typically three metres) which can snap during transport to the picture framer, rendering it useless if the break is at the wrong point from which to cut a frame. This then has to be replaced incurring further transport costs and delays. However, these breakages are not a regular occurance.

In 1987, D & J Simons Ltd introduced Emafyl to the trade, which was an extruded plastic moulding. The Polcore range was introduced a decade later and is manufactured from mainly recycled plastic (see Chapter 4.3.6 for more detail) unlike the Emafyl range, with both costing a fraction of the cost of wooden alternatives for a framer. But again, this innovation is over 30 years old. Simons have now ceased the production of Emafyl.

Similarly, more thought has gone into the manufacture of mountboard, with the UK manufacturers working closely with the FATG to ensure that mountboard is made to a high quality, especially for conservation level framing, as well as in an environmentally friendly way (see Chapter 4.3.6 for more detail).

So, from a picture framer’s point of view, innovation and technological change operates at a snail’s pace compared to other industries, particularly at the bespoke level. However, the equipment is usually manufactured to an extremely high standard and is relatively simple in terms of construction, with little to go wrong other than user error or general wear and tear. Therefore, it lasts a long time and can be easily sold in good working condition on the secondhand market - the researcher’s Morsø was made in 1976, his Keencut System 4000 sheet cutter ceased production in 1995 so dates from before this period in time as it was a demonstration machine, and his original mountcutter when opening the business in 2017 was the same model as the one that he was selling new in 1989 and which went out of production in the mid 1990’s.

4.1.5 – Environmental

Five important stakeholder groups in the picture framing trade are:

- Customers - who are the end users, the individuals and organisations that order picture frames to be hung up in their homes or business premises such as pubs, accommodation, offices, etcetera.
- Competitors - who are the picture frame makers themselves.
- Manufacturers/wholesale suppliers of wood-based products.
- Manufacturers of equipment.
- Manufacturers of plastic-based products.

All these stakeholders are competing for resources, revenues and profit. In an increasingly aware society where environmental factors are at the forefront of information given to consumers, wood such as Ramin which is a hardwood from the tropical forests of Indonesia and Malaysia, has virtually disappeared from the moulding manufacturing process as it is now classed as endangered and is only used in its local markets in South East Asia ('Ramin | The Wood Database - Lumber Identification (Hardwood)', no date a). Other woods such as mahogany and teak are also reported to be in very short supply (Morris, 2007a) so do not feature very often in manufacturer ranges. Sustainable woods from sources that are endorsed under the Programme for the Endorsement of Forest Certification (PEFC) scheme and/or the Forest Stewardship Council (FSC) are the main raw materials used for picture moulding now, with the main woods used being;

- softwoods such as pine,
- hardwoods such as Obeche, Koto, Ash, Oak, Beech, Tulipwood and Lime (Wessex Pictures, 11th Edition).

Manufacturers such as Larson Juhl hold 'accreditations from the PEFC and the FSC Chain of Custody' (The Life of a Moulding, Larson Juhl) which allows them to be recognised as leaders in the industry and hopefully gain a marketing advantage over other manufacturers that don't have these accreditations.

The PEFC was founded in 1999 and has five main sustainable development goals (SDGs) (*PEFC - Programme for the Endorsement of Forest Certification*, no date). To date, there are 55 countries that have at least one company with PEFC accreditation, 20,000 companies have PEFC Chain of Custody accreditation and 750,000 forest owners which encompasses 320 million hectares of forest which are PEFC certified globally. These figures are impressive but there is a large gap in membership in Africa, with only five countries being members, as well as in Central America (no members) and South America (5 members but only four have any hectares certified). There are also issues in Eastern Europe where the likes of Romania have been members since 2016 but don't have any hectares certified either (*PEFC - Programme for the Endorsement of Forest Certification*, no date).

What this means for the manufacturers of moulding and mountboard, and who are members of the PEFC, is that they couldn't source wood from countries such as Greece as they are not members of the PEFC without risking expulsion from the organisation and possibly gaining negative PR within the trade.

The FSC was founded in 1993 with an aim to 'promote environmentally appropriate, socially beneficial, and economically viable management of the world's forests' (Kingdom, no date a). They encourage members to promote the sustainable use of wood-based products by using their registered tick logo (Image 21), right through the chain of production to show that the products that end users use have been sourced responsibly.

Image 21 – FSC logo

Source: Forest Stewardship Council (no date)

But is membership of these two organisations being used effectively. From a personal view point, no. The researcher wasn't aware of Larson Juhl's membership of either until this research was undertaken as he wasn't aware of their existence – no one in the company had used it as a sales or promotion tool, although they are not one of his major suppliers. Nor has he seen the use of the FSC tick logo by his main supplier, Wessex Pictures, even though he buys Larson Juhl mountboard from them and they could use the FSC tick logo if they wanted. Having checked the websites of all his suppliers, the researcher has been unable to see any mention of accreditation on any of their home pages of either the PEFC or FSC. The problem here, as explained by Supplier 7, is that although any company buying a product that is FSC sourced can then also use the FSC tick logo in their advertising; however, if they are also buying stock from non-FSC sources, then the FSC sourced stock must be stored separately all the way down the supply chain if a business wants to use that accreditation. This increases storage costs and paper work.

Supplier 2 reported that, following the Covid 19 pandemic and Brexit, they were having continuity problems regarding quality and colour of some mouldings that were originally marketed as an FSC product. He stated that the company had had problems with supplies from these FSC suppliers, so had simply found a new, non-FSC supplier instead, as their customers (picture framers) really didn't care about the whole FSC concept, even after they had run a major promotional campaign.

As already mentioned in Chapter 4.1.4, manufacturers of moulding have reduced the amount of waste in the manufacturing process through the use of finger joints (Image 22). Moulding used to be produced from a single length of wood which would vary in length from about two to three metres. This is still how natural wood frames that have no finish on them are made (e.g. oak). However, many mouldings have a finish on the surface which hides any defects in the wood and allows finger jointing techniques to be used to join different lengths of wood together, thus minimising waste and allowing for a degree of standardisation to be utilised (but not always used).

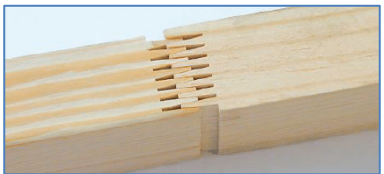


Image 22 - Finger joints

Source: www.esshelf.com

The trade has also seen the introduction of plastics for use as picture moulding with the development of Emafyl, an extruded polystyrene moulding, which was launched in 1987 by a British inventor called Howard Simons and who based his manufacturing company in Woolwich, London. Emafyl was part of D&J Simons Ltd and gained the Queens Award for Export Achievement in 1996 for its success (‘About Us’, no date a). Although extruded polystyrene is recyclable, Emafyl doesn’t use much recycled plastic in the production stage, whereas Polcore, which is distributed by Mainline Mouldings and was launched in the mid 2000’s, uses a mix of 70% recycled plastics from electronics and food industries and 30% virgin plastic in the core of the moulding, with any waste going back into the production process (*Polcore*, no date). The use of recycled materials in the manufacturing phase creates less bubbles in the finished moulding than in Emafyl, allowing it to be cut cleanly by a guillotine such as the industry standard Morsø rather than shattering due to the downward pressure (think Nestle Aero vurses Cadbury’s Wispa cut with a knife – the smaller bubbles of the Wispa allow for a less crumbly chocolate).

However, D&J Simons ceased selling the Emafyl range as of 2021, suggesting that it was no longer a viable option. No reason was given for this decision by the company, although they only sold it by the case, therefore excluding many bespoke framers who couldn’t justify buying one single design of moulding in this quantity. Mainline Mouldings, on the other hand, sell Polcore by the length, pack or case, thereby appealing to all sizes of picture framing business.

Paper used in the manufacture of mountboard also comes from sustainable sources with the likes of Slater Harrison being FSC registered, and all UK manufactured boards being manufactured to the FATG’s four levels of framing standards. The FATG standards for mountboard consider:

- *Pulp composition and purity, testing methods, pH value, alkaline reserves and fillers*
- *Facing paper colourants, bleed, lightfastness, abrasion resistance, testing methods; sizing*
- *Lamination adhesives*
- *Moisture content*
- *Board markings*
- *Thickness and Board Dimensions*
- *Quality Control*
- *Packaging*

(*FATG Mountboard Standards*, no date)

4.2 – Chapter 4 summary

A PESTEL style analysis was conducted on the picture framing trade to provide context on the industry. This PESTEL style analysis showed how the trends and changes in the industry have come about, as well as providing ideas for development within the main research into North East picture framing businesses, such as the level of demand for conservation framing. The PESTEL style analysis also showed the slow development of technology at the bespoke level of framing, whilst at the same time showing how this slow development has created a healthy demand for used equipment which lowers entry barriers.

The development of a sociogram for the framing trade also showed how complex the trade is, with no central body being able to direct the trade. The PESTEL analysis also showed how the trade has changed in structure, with many bespoke framers struggling to compete with big box stores selling cheap photo frames and desperately trying to adapt their businesses to a changing business environment, some more successfully than others.

Chapter 5 contains the results of the pilot survey and the main research.

Chapter 5 – Analysis of findings from the pilot and main research

Chapter 4 provided a detailed PESTEL style analysis on the picture framing trade, which showed the impact that political decisions have had on the trade; where design ideas originated within the trade; the impact that digital natives have had on the trade alongside the use of sociograms to demonstrate the lack of a central control point within the trade; the glacial speed at which technology changes but which also brings benefits; and the way that conservation practices are changing the production of materials, but not demand.

Chapter 5 contains the results of the pilot survey and main research and which highlights any interesting results which are linked to prior research where possible.

Chapter 5.1 focuses on the findings from the pilot research. This was carried out on micro businesses in the North East of England and was undertaken to establish some base data for micro businesses, as well as to test the survey questionnaire. Where possible, findings are linked to prior research. Any changes required before undertaking the main research have been identified and a summary of areas of interest provided.

Chapter 5.2 provides the theme structure of the main research via a flow diagram and follows the ideas of thematic analysis. It was developed and adapted as the research was analysed and evidence built up.

Chapter 5.3 is concerned with the main research findings into the issues faced by bespoke picture framers in the North East that operate as micro businesses. Within this chapter, analysis of the findings into the general environment which framers operate in is provided, along with any impact that they have felt due to the changing face of retail in the region. This is followed by an analysis of the findings regarding growth drivers and any barriers to growth that have been encountered by the OMEs, and whether OMEs carry out any formal planning. The findings regarding the use of business support agencies is then recorded, followed by the findings regarding the financing of the business. Whether the framing industry is innovative in any way is examined next, including the impact of conservationism, followed by the findings on whether framing business OMEs network or not, and the reasons for their answers. The final set of findings relate to whether the OMEs think that there is a future for bespoke picture framing businesses in the North East.

5.1 - Pilot Research Findings

Of the ten businesses invited to take part in this research, seven of them agreed. Five of the interviews went ahead as planned, but due to problems organising a mutually convenient time that wasn't then cancelled due to their work demands, the other two respondents were not able to take part in the research. Of the five respondents that did take part in the research, two were based in the urban Tyneside area, one in rural Northumberland and two in the Redcar & Cleveland area (one in a rural area), thus providing coverage from across the region as well as from urban and rural areas.

None of the businesses operate within a high-tech environment, nor can they be considered fast growing, thereby having similar traits to bespoke picture framers in the region. All five entrepreneurs operate their businesses from their home premises.

- Business 1 operates as a middleman between the supplier and customer, operating a retail operation and generating sales through advertising in publications read by his target market as well as online.
- Business 2 is a cleaning business, cleaning individuals' homes and small workplaces.
- Business 3 is also a cleaning business, but only in individuals' homes.
- Business 4 operates as a building and maintenance firm, taking on large maintenance and construction jobs as well as smaller ones for the public.
- Business 5 is a pest controller operating in a rural environment and providing a service for farms, businesses and the general public.

5.1.1 – Research findings

Question 1

Table 8 – Gender of OMEs	
Male	**Female**
2	3

The results in Table 8 show a good gender balance amongst the respondents, therefore not skewing the results in favour of one gender or the other.

Question 2

Table 9 – Age of OMEs	
Age category	**Number of respondents**
< 25	0
26 – 35	2
36 – 55	1
56 – 68	2
69 >	0

The results in Table 9 show the entrepreneurs ages now and in a later question how long they'd been in business (Table 10) to establish the age at which they set the business up. However, to do this accurately in the main research it was established that it would be easier to ask them their exact age as, although they may state that they fall within the 26-35 age bracket and they've been in business six years, they may only be 27 years old and therefore set the business up when 21 years old. This makes it harder to compare against prior research elsewhere.

The results of **Question 3** showed that among the respondents, the highest level of education held was by entrepreneur 1 who had a degree (a level 6 qualification), but whose business over five years had not grown much and was affected badly by the Covid 19 pandemic. In comparison, entrepreneur 4 gained a Higher National Certificate (HNC) which is a level 4 qualification and then went on to firstly create a business that employed in the region of 80 people, and then set up another successful business which he still owns and has grown it to the point that he is happy with its size. Entrepreneurs 2 and 5 both possess level 3 qualifications in the form of a National Vocational Qualification (NVQ) Level III and Advanced (A) Levels and are happy with their speed and level of growth, whilst entrepreneur 3 has an NVQ Level II and has also suffered badly from the Covid 19 pandemic.

Question 4

Table 10 – Length of time in business	
Entrepreneur	**Time in business (years)**
1	5
2	1
3	8
4	24
5	4

Entrepreneurs 1 and 3 both reported that the Covid 19 pandemic had virtually wiped their businesses out, only just managing to survive through employment elsewhere as well as trying to keep the business afloat. However, Entrepreneur 2, which is in the same industry as Entrepreneur 3, only started up 12 months prior to taking part in the research and which was after the pandemic had started, reported that she had benefitted from the pandemic in terms of growth, as more people were working from home and required deep cleans.

Entrepreneurs 4 and 5 didn't report any major change in demand, with business 4 having a full order book well into 2022.

With **question 5** it was found that all five entrepreneurs had set their businesses up from scratch, although business 4 benefitted from the breakup of his previous partnership in that he took the construction side of the business with him in terms of customers to get started again, whilst his former partner took the UPVC element of the business.

Questions 6 and 7 demonstrated that all five businesses were classified as micro businesses as they had fewer than 5 employees and a turnover below £250,000 (Table 11). Only Business 4 had any employees whilst the four entrepreneurs without employees were quite happy working on their own and had very little interest in employing anybody else due to their enjoyment of being their own boss. Added to this was the fear of, and the perceived complexity, of employing people which was a further deterrence.

Table 11 – Estimated turnover

Business	< £40,000	£85 - £250,000
1	Yes	
2	Yes	
3	Yes	
4		Yes
5	Yes	

Even entrepreneur 4 stated his reluctance to employ any more people than he had already due to the complexity involved, as well as the worry of maintaining enough work for them, As he stated, he would,

rather have full order books for months ahead that ensured employment for them all and turn extra work down, than employ more people and find that those employees were on variable contracts that were dependent on having the orders coming in now.

He also stated that due to his experience in a previous business, he found that 'more employees meant having to have a dedicated business premises as well as an HR department to look after them all, thus increasing his stress levels'. In his words 'Been there, done that, don't want it again'.

For **question 8- 13**, although all five entrepreneurs answered 'No' when asked if they had any experience, it was clear as the discussion regarding their businesses went on that some of the entrepreneurs did have relatable experience. Entrepreneur 4 had experience of setting up and running a business within a very similar field prior to the establishment of the current business, whilst Entrepreneur 1 had experience in the music field due to his degree and participation in brass bands and orchestras, but not within the sales field. Entrepreneurs 2 and 3 both had personal experience of cleaning but not as a form of employment, and entrepreneur 5 had grown up in a farming environment so had a small degree of personal experience before the laws regarding pest control stopped individuals from dealing with the problem and allowed her to specialise in this area. This demonstrates the problem of identifying personal experience of doing something, from being paid to do something – so the wording of this question will have to be reconsidered in the main research as it may give vague answers.

Question 9 was linked to Question 8 and will form part of the general discussion regarding their experience in the main research so will no longer be a separate question in the main research. Similarly, **Questions 10 - 13** are also to be incorporated into question 8 in the main research as they are all to do with owning businesses before, thus establishing whether any of them are serial entrepreneurs or whether they have had any management/leadership experience that would have helped them in any way. All this information came to light during the discussion anyway and therefore will not warrant different discussion points in the main research.

Question 14 was the first real open-ended question asked and revealed how open the respondents were to talk about their experiences, leading to the decision to change the main research to solely qualitative in nature. It had a resounding result in that all five of the entrepreneurs chose to set up their businesses in the North East because that is where they live. Only Entrepreneur 1 reported thinking about locating himself in London because of the larger music scene, but decided that as he sold mainly from adverts and online, he'd remain near to his roots and his initial customer base found in the brass bands that he played in. Entrepreneur 4 also set up in the Northeast because he had gained a large maintenance contract for the largest indoor shopping mall in the region (the Metro Centre) with his previous business venture, and which he was able to maintain with the current venture – he never felt the need to look elsewhere.

Question 15

As can be seen from the results of Question 15 in Table 12, three out of five of the OMEs stated that one of the motivational factors behind setting their businesses up was a need to try and ensure their future – a push factor.

Table 12 - What was the motivation for setting your current business up?

Source: Developed from the research findings of Venckuviene (2014)

	Biz 1	Biz 2	Biz 3	Biz 4	Biz 5	
a. To prove to yourself that you can create a business.						0
b. To earn more money.			1			1
c. To ensure your future (e.g. due to redundancy).	1			1	1	3
d. Internal motivation (wanted to be a manager for myself).			1	1		2
e. Work independently.			1			1
f. Found the business niche.					1	1
g. Had a clear idea of the business format due to experience.				1		1
h. Encountered a problem and its solution has evolved into a business.						0
i. Self-fulfilment in a business.		1		1		2
j. Pursuit for entrepreneur's status in the society.						0
k. Family or friends' encouragement.		1	1			2
l. Successful experience of relatives or friends.						0
m. Creation of workplaces for family members/friends.						0
n. Improve work/life balance		1				1
o. Other (please state)	1	1	1			3
	Interest in music	Fit around family needs	flexibility			

However, pull motivational factors were also important to the OMEs upon set-up as well, with internal motivation, self-fulfilment, family/friends' encouragement, and flexibility to fit around family needs all next up in importance. What's interesting here is that OMEs 2 and 3, who both highlighted the need for flexibility to fit around family needs, are middle aged women supporting extended families, and who were both encouraged by friends and family to start their businesses. They are also in the same industry – cleaning, which is relatively easy to set up.

Question 15a

Surprisingly, not many barriers were identified by the respondents (Table 13), although the usual one of a lack of funding/support from banks when first setting up was stated a twice, with OME 4 mentioning how the banks would not support him when he first started the business, so he took very little money out for himself 'for the first couple of months until the money from customers started to flow. Now the bank is always after my business, even though I don't need it!'. OME 1 also identified problems negotiating terms with suppliers as well. This led him to change his business approach to them and became more focused on exactly what he might be wanting to purchase from them as opposed to saying, 'everything and anything', which worked to his advantage.

Table 13 - Did you encounter any barriers when you were setting up or running the business in the first few years?

	Biz 1	Biz 2	Biz 3	Biz 4	Biz 5
a. High levels of bureaucracy.					
b. Overcharging by suppliers.					
c. Lack of initial capital to start a business.	1			1	
d. Lack of working capital for new investment.					
e. Complicated recruitment process for qualified specialists.					
f. Complexity of business registration procedures.					
g. Sophisticated business credit conditions for buying.	1				
h. Sophisticated business credit conditions for selling.					
i. Problems in creating and developing business infrastructure (e.g. systems for communication).					
j. Lack of technological knowledge.					
k. Lack of market knowledge.					
l. Uncertainty for product demand.					
m. Business consultation institutions providing fragmented services.Not sure how to run a business.		1			
n. The lack of business plan preparation knowledge or continuing use of.					
o. Lack of information on the business creation.		1			
p. Lack of networking opportunities					

When asked **Question 15b** regarding support from business agencies, OME 1 reported that South Tyneside Council had put him into contact with other agencies that helped him source financial support. OME 3 used a support agency in Redcar who put her into contact with an accountant that provided her with some free accountancy advice, as well as encouragement on how to grow and expand her business into other locations. However, OME 2 highlighted the issue of poor support from support agencies as there were none available to visit in her town that she could find, and she found it difficult to find the information online. Being based in a small market town, she did think that it is possible that it wasn't large enough to warrant a business support agency of its own, which highlights the issue of how rural businesses gain support, particularly if they don't have transport of their own. She admitted that her IT skills were not very good which may have added to her lack of success in finding support online, demonstrating a training need. OMEs 4 and 5 had never looked for support as they had never felt the need.

The topic of business growth was broached in **Question 15c**. OMEs 1 and 3 both reported that they would like to grow their businesses back up to where they were pre-Covid 19, as they had both suffered badly in terms of lost business. OME 2 was not interested in growing beyond what she could deal with herself due to uncertainty regarding the employment of people and being afraid of any legal implications that it may entail - an opinion of which was echoed in the comments by OME 3 as well.

OME 5 had no major plans for growth other than slow organic growth due, she felt, 'to the seasonality of the work' that she does. She also said that she felt that she was limited in terms of location with half of her potential radius of business being in the North Sea and therefore useless to her. She also felt that 'although her rural location gave her ample farms to use as potential customers, the lack of wealthy urban areas and vast swathes of moorland' also limited her potential for growth.

OME 4 was the only one that employed anyone now but had no plans for further expansion. He was happy with the level of business that they had, with enough work to keep them busy for several months, all built around their maintenance contract for the Metro Centre. Plus, having employed in the region of 80 people in his previous business, he didn't want the 'sleepless nights' again of worrying about having enough work in for everyone and employing other people to run an HR department, as well as the extra costs of a larger premises to house them all. Bear in mind that he runs his current business from home, which is also his showroom.

For the main research, this question will be incorporated into other discussion topics regarding changes in motivation over time, as growth can only be considered once start-up survival is achieved.

Question 16's results showed that none of them used any form of formal planning other than that which was required when setting the business up for financial reasons, such as opening a bank account. They all stated that they do carry out some form of planning in terms of when jobs can be done, especially for seasonal work, but that this planning tended to be done in their heads. Any other planning was reactionary to events happening at that point in time. OME 4 does have to prepare health and safety plans for work in the Metro Centre but that is the only form of formal planning that he undertakes as it is a legal requirement.

When it came to the use of networking in **Question 17**, OME 1 said that he used it initially, attending various networking events to get his name 'out there' but found it to be of very little benefit in raising awareness of his services. He's had more success via his personal networks in brass bands and orchestras so focuses on these areas now. OME 5 also only uses her personal network of friends and family, but which is quite extensive due to her family's background in farming. She is not a member of any organisations such as the National Federation of Young Farmers as she's never been interested in joining, nor does she see any benefit. None of the OMEs considered the use of friends and family to spread the word as networking.

OMEs 2 and 3 reported that the only networking that they employed was word of mouth to build their businesses reputation. OME 4 also said that he gains customers through word of mouth with no advertising being done. He has been involved with the likes of guilds in the past but found that he got 'very little back in terms of business compared to the cost of membership'. He has also been involved with organisations such as Checkatrade which he had to pay to be a member of and would then receive requests for quotes via the third-party operations website or advertising. However, he reported that 'all builders etcetera in the same area received these requests', so he found that it turned into a bidding war amongst them all, where quality was the loser – something that he refuses to lower.

OMEs 2, 3 and 4 were all digital immigrants who weren't confident about using technology. In fact, OME 4 was the only one that refused to be interviewed via Zoom or Skype due to his reluctance to use these platforms. But even the two younger OMEs reported very limited use of technology to build their business, although OME 1 is looking at changing his business model to be more of an online retailer in future.

Business 4 is involved in the construction industry and over 20+ years have built a good reputation for high quality work using modern techniques in a tried and tested way. However, the OME feels that he doesn't need to push for more business via any other method than word of mouth.

Question 18

When asked whether technology had changed the way that the entrepreneurs carried out their jobs, other that the use of PC's their answers were split (Table 14).

Table 14 – Has technology changed the way you, or your competitors, operate the business?

Yes	No	Some	Explanation
OME 1			There are now two dominant suppliers that he can use, both online.
		OMEs 2 & 3	Use of computers to do accounts, access Google My Business, to use social media.
OME 4			New technology has changed the materials that he uses as well as the utilisation of CAD across the board.
	OME 5		Designs may have changed but not the process.

OME 1 stated that there had been a huge shift over the last few years away from bricks and mortar retail outlets to two dominant online only suppliers of musical instruments – one UK based and the other in Germany.

OMEs 2 and 3 both report little change in the way that they do their jobs from a technology viewpoint. Both OMEs 4 and 5 stated that computers help them to complete paperwork such as health and safety reports or risk assessments quicker, backing up the use of computers by OMEs 2 and 3.

However, OME 4 did go on to state that there have been changes, particularly on the building side of his business, giving examples such as the improved treatment to timber which is allowing smaller sizes to be used in areas such as roof trusses, but that these have also led to higher prices. The use of resin to make driveways has also become popular over the last few years and has meant that he and his team have had to undergo training in the best techniques for laying this type of material. They also must take part in regular training on equipment such as cherry pickers, as the technology on them is constantly changing and adapting. But one of the largest changes that he's seen is the widespread use of CAD in the design process, something that they don't do themselves, but their third-party designers are expected to use it. This expectation of use also extends to his customers who no longer accept a design 'on the back of a bit of scrap paper'.

OME 5 felt that things such as mole traps have moved on in areas such as design, but that the basic methodology hadn't changed.

Question 19 on the factors of success (Table 15), changed very early on in the process from the initial idea of being a closed question with multiple choice answers, to one of an open-ended discussion which ran freely throughout the interview. This latter form of recording answers will also be employed in the main research as it allows for a more open discussion without the researcher influencing the answers whilst also demonstrating the researchers learning as the research went along.

Table 15 – Factors of success

Factor	**OME**	**Explanation**
Perseverance & tenacity	1 & 5	Being able to bounce back after a setback.
Staying up to date with legal requirements	2	Particularly important during Covid 19 as they were constantly evolving.
Reputation	3	Enabled word of mouth recommendations.
Reliability	3	Doing the required job when it's required.
Relationship building	3	Enabling repeat business and word of mouth recommendations.
Value for money	3	This varies according to individuals view points
Quality	4	The business is built on this reputation.
Use of existing contacts	5	Helped reduce marketing cost whilst maximising visibility.

These results are very much in line with the idea of micro businesses relying on quality aspects to maintain their customer base, linked very closely to the face-to-face aspect of all five of the businesses involved in the research.

5.1.2 – Areas of interest revealed in the pilot survey

It became clear that the questionnaire needed to be adapted for use in the main research, a strategy outlined in Section 3.2 as adaptive research. However, four areas of interest that came to light because of the research were:

1. That of ‘people related issues’ (Lin, 1998b) being of more importance than either structure or technology, as are ‘soft attitudes, skills and operating methods’ compared to ‘hard equipment’ (Lin, 1998b). The success factors are about the way people treat their customers, about their own mental attitude and their approach to how the work is done. You can have all the technology in the world to do the task, but if you treat people the wrong way, it can be fatal for a micro business. After all, it’s far cheaper to maintain good relations with existing customers than it is to court new ones (Reichheld, 2001a).
2. The reluctance of the entrepreneurs to grow their businesses much beyond their post pandemic levels suggesting that it is, as has been suggested by Casser (2007), cited in Gherhes *et al*, (2016) and De Souza and Seifert (2018), the entrepreneurs themselves that are capping growth. Even though their business may have potential to grow, they are more concerned about their lack of knowledge in areas such as employing people or simply wish to ensure that they have enough work in for the employees that they have, without wanting to spend time looking for extra work to keep paid staff busy.
3. Push factors had led all five entrepreneurs towards the self-employed route as a desire to create a secure future for themselves was more important. Opportunity (pull factor) was not responsible for any of their decisions. This also linked to all five of the respondents setting up their businesses in the area where they lived as opposed to spotting an opportunity and relocating to fulfil it.
4. None of the respondents used networking in any effective way, either by membership of formal groups or via the internet, preferring to rely on word-of-mouth to get their name known.

5.2 – Main research findings

The North East has seen a decrease of over 30% in the number of picture framing businesses between 1997 and 2021, with the number of picture framing businesses falling from 125 (Redfern, 1997) to just 85 in 2021. Further evidence of this decline in numbers has been demonstrated in the closure of a further five framing businesses that the author knows of, during the writing of this research thesis - one each in Barnard Castle, Gateshead, Sunderland, Darlington and Jarrow. Whilst carrying out the field research, other framing businesses were found to have non-existent phone numbers or email addresses which may suggest that they have also stopped trading. However, others may have opened which would possibly help to balance this out but is unlikely due to the historical fall in numbers.

This decline in the number of picture framers was confirmed by all suppliers with Supplier 6 estimating that there was at least 30% fewer, confirming the researchers findings. Supplier 7 said that he'd noticed the difference in the last 10 years with more people leaving the trade than joining (no figures were provided to back up this statement). Although Supplier 5 was unable to comment on the North East directly as they don't have a breakdown of figures for each region, he was able to confirm that there were so much fewer framers in the North of England, that it wasn't viable to maintain the employment of a sales representative in that area any more.

This reduction in the number of picture framers is creating its own negative cycle according to Supplier 6, who stated that 'Out of sight, out of mind' was causing the public to forget that picture framing businesses exist, and that they had something that could be framed. However, he also pointed out that fewer framers meant more business for the framers still trading, a view that was also given by Business 2.

5.2.1 - Location and workshop appearance of businesses taking part in the research

Location is a crucial element for some businesses, whilst for others useable space is more important. The picture framers that took part in the research could be found in a variety of locations.

- Three were home framers, two in large urban areas and one in a rural location.
    - One of them had downsized from a gallery due to family circumstances and was based in a large town.
    - One was based in a city and had been running for over 25 years but has slowed down due to illness and potentially retirement.
    - One was a hobby business in a rural location.
- Seven were located either on the edge of their respective town centres or near the town centres themselves.
    - Six were in a ground floor retail location, four of the owners of which were close to retirement.
    - Four were on a major road with lots of passing traffic but little footfall.
    - Two were in town centre positions with lots of footfall, one of which was also on a main access road.
    - the other was on the first floor above a row of retail units.
- Two were in factory units, one of which was close to retirement.
    - One on the edge of a town centre area.
    - One in a rural location.

Home framers

The three home framers interviewed had not been impacted by the changes in the retail environment in any way.

The owner of Business 5 stated that when he originally opened his business as a gallery in a market town, he would have liked to have located it in the middle of a large town centre such as Darlington. However, the cost of rent and rates precluded this location. He felt that further problems existed in setting up in locations such as small shopping thoroughfares such as those found attached to some supermarkets, as many of these small shops 'did not have access to water or toilet facilities, leading to the temporary closure of the shop when these were required, which could mean a lost customer'. He also felt that the public didn't go window shopping in these shops 'as their focus was on what they needed from the supermarket'. Therefore, he'd focused on a town where independent businesses tend to dominate, where the overheads were of a more manageable size and both locals and visitors to the town tended to peruse the shops. However, personal circumstances had led him to give up his gallery space and change his operation to a small-scale home framer in Darlington.

Neither Businesses 7 nor 8 had any intention of trying to grow beyond their home set up, therefore their location was determined by where their home was located. Business 7 was in a very rural location in Northumberland, with the workshop being setup in an old stable block which provided a small manufacturing area where the clean work was carried out and a larger shed which stored the moulding and Morsø mitre machine. However, this latter shed is not watertight, and she is having problems keeping the moulding dry, so it was all covered in plastic – not the place to take a customer. She is semi-retired and isn't operating the business as a main income.

Business 8 has operated from their home in a middle-class area of Newcastle for 25 years, never wishing to operate from anywhere else due to the lack of overheads from home and, if they weren't busy, they could do 'other jobs around the house' - it suited their purposes. The business operates out of their garage which had a small design area at the front which was separated from the main workshop by a wall, with a doorway allowing access between the two areas. Like Business 7, they were not dependent on the business for their income as they had pensions coming in and their home was paid for years ago.

Retail framers

Seven businesses operated from what could be classed as retail positions. Business 1 has a lot of passing traffic as it's located on a major road in to/out of Hartlepool's town centre but has very little footfall as the main retail area of the town has moved away from where he is located. There is free parking directly outside the shop, but he said that this is often 'taken up by the employees of the other businesses around him'. However, this didn't cause his customers a major problem. The shop has a large double window at the front in which he displays a range of pictures and services that he offers, and inside it has an open plan design which allows plenty of room to move around in and which is easy for a sole trader to operate from. Although he likes to have pictures on display, he did admit that he doesn't sell many, and some of them looked quite old. The shop itself has a tired look, reflecting the style of the previous owner who had retired, and showed signs of water damage on the wall. The current owner did admit that he wants to refurbish the shop and bring it into the 21st Century but was also considering if it was worth it as he has also thought about relocating to an area with a higher average income. In winter he stated that the shop is cold and difficult to heat, therefore not comfortable for customers either.

Business 4 had a large retail position with large windows facing a small car park and was situated in the middle of a large housing area in Sunderland. However, there is very little footfall or passing traffic as this used to be an area for local shopping, but which has ceased to operate in this way as much. There is a clean area for finishing work towards the rear of the ground floor and a large workshop come storeroom upstairs where frames are cut, all which allows plenty of space for the two owners to work in. Artwork is on show around the ground floor retail area. Like Business 1, Business 4 found it very cold in winter and hard to heat due to its size. The main stated reason for locating the business here was that 'it was available' at the time of setting it up. When the researcher visited Business 4's premises, they were in their final month of trading before going into semi-retirement and were due to relocate the remaining business to Hartlepool for a year or so where they were going to work from a friends business premises. Therefore, the business wasn't being seen at its best.

Business 6's location is on a corner plot near to Stockton's town centre, where two large windows display art work to passing pedestrians and traffic. Over approximately 40 years, the owner has operated from three different shops on the same street. Inside, it has a good-sized retail area with lots of moulding chevrons and art work on display, with a clean area at the back where mounts are cut, and printing done. The main shop is clean and bright thanks to the large windows but is rather full making it difficult to see everything. There is another room behind this where the frames are made and moulding stored. It felt clean and dry.

Business 9 was in the centre of a small town in the Redcar & Cleveland area which has had a renaissance in recent years due to its location on the coast. Many people visit it for day trips whilst others have purchased second homes in the area. His shop is in a pedestrianised area on a corner plot which gives him two decent sized windows in which to display art and other giftware that he sells. The shop itself is quite small but does have a mezzanine floor approximately half the size of the ground floor shop which enables him to operate the dirty part of the manufacturing stage in a small room occupying half of the upper floor out of the way. Moulding is also stored in this room making things quite tight. The other half of the upper floor has a small seating/display area. The clean operations take part in the main shop area on a large bench that doubles up as the design area. However, this leaves very little space to display work for sale or move around much during the manufacturing stage. It's a very light and airy position that does welcome people in. This is the second location for the business, with their first one being about '100 yards' away in a much more suitable building, but one which didn't offer any passing trade.

Business 10 is in an economically depressed town in County Durham and is located just outside of the town centre. He reported that the town centre has seen a lot of businesses close permanently which has resulted in fewer people shopping in the town and which results in little passing footfall for his own business, but it is on a main road with lots of passing traffic so is visible to them. This framing business also offers art for sale as well as operating as a café and music venue. It's very well presented inside and out, with the owner striving for a 'sitting room feel', but the framing is very much a secondary element to the café side of the business with little evidence of this service being available from the front of the shop, other than some framed art work in the large double windows.

Business 11 is located above a row of shops serving a local area in South Tyneside, but which has seen many of the businesses closing permanently in recent years. It used to be a vibrant shopping area when the original owner, the current owners grandfather, established it at this location in the 1970's, with a gallery displaying his own art work in the front room of the premises, and the workshop in the rear. The current owner has done nothing in terms of décor since taking over which results in a rather dark and dirty looking environment, which he likes as he believes that it reflects the time that the business has been there. He's never tried to move the business anywhere else due to the cost of rent and rates in the town. However, he did state that its location was good as there was 'plenty of free parking around the area which meant that customers could easily carry large pictures back to their cars, especially on wet and windy days'. However, being upstairs there is very little curb appeal and may put some elderly or disabled customers off from using the business.

Business 12 is located on a corner position of one of the main ring roads in a market town in Northumberland, affording them two large windows that allow lots of light into the retail area. The windows are used to show off old equipment, and the wall space inside has a few examples of work that they can do, but they are very old and faded. The shop area is mainly used as a design area and for clean work, with the manufacturing taking place in a basement area. Nothing has been done with the internal décor of the premises for quite a few years and is not likely to get done now as the owners are looking to retire in the next year or two. Outside, there is some free off-street parking and a main road with lots of passing traffic. However, although they are located quite near to the town centre, they are far enough away to deter much passing footfall therefore not benefitting from the major tourist attraction on their doorstep.

Factory framers

Two of the picture framers that took part in the research operate out of factory units. Business 2 has a medium sized unit on a small industrial estate in a rural area of Northumberland that is near to a major dual carriageway and market town. Having operated in the trade for over 40 years, she has a lot of customers that have used her services for a long time and are willing to travel to her location. As she is looking to retire in the not-too-distant future, the lack of passing trade of any kind is not a major concern to her as she is focusing on her established customers and trying to use up as much of her existing stock as possible. The building itself has been divided into two areas, with a large design area come clean area at the front that has two large benches in and a dirty area behind a false wall where moulding is stored, frames cut, and a spray booth installed for hand finishing mouldings and furniture. The front also has a mezzanine floor installed which is about the same size as the ground floor area and which was supposed to be used as a teaching area but has mainly been used as an extra storage area. None of the areas look particularly tidy, with bits of mountboard and moulding strewn across the design tables and moulding and other stock all over the place in the rear area. A few examples of framed artwork hang on the walls and there is a good-sized display of moulding chevrons for customers to look at. The owner said that the installation of the partition wall and mezzanine floor was also to try and warm the building up in winter as, being a factory unit, it's roof is high, and the rear area of the building is very cold in winter. However, there is no signs of damp.

Business 3 was inherited by the owner when his father died and is in an old factory unit on the edge of Middlesbrough. Having previously been the manufacturing point for other retail and market outlets that they operated and therefore never thought of as a customer friendly sales point, it has a tatty appearance inside with broken glass and bits of packaging strewn across the floor. There is no noticeable design area other than a table near to the front door beside which are a couple of small sample boards showing their limited range of mouldings. The owner admitted that he needed to do something about the look of the interior, but also stated that his customers tended to be happy to operate at the cheaper end of the quality spectrum so therefore weren't all that bothered about how it looked. No work is on display.

Impact of changes to the retail sector

As many picture framing businesses have both a retail and a manufacturing element, have the changes in the retail sector had an impact on the business? Of the 12 picture framing businesses taking part in the research, seven of them operated out of what could be considered as retail environments, but only two of them were in town centre positions. None of the businesses had relocated out of a town centre. In all but two of the 12 businesses, the location was purely opportunistic in that they simply wanted somewhere to operate their business from that was of a suitable size and cost. The other two businesses were inherited. Therefore the changes in the town centres around the region haven't had that big of an impact on the bespoke framing side of the business.

All the OMEs reported that their main source of sales is generated from the framing side of the business, with framed art accounting for a far smaller percentage of sales than in the past, with Business 6 estimating that framed art sales now only account for about '10% of total sales'. Business 11's grandfather, who set the business up originally, was a prolific artist and painted scenes from all over the region but specialised in his local area. His grandson, who is now the owner, still has the rights to sell this artwork and has a stock of prints, which does generate ‘some’ income due to the limited demand for local images of the past, but no passing trade due to the location.

None of the businesses now look towards sales of artwork as a major source of income, citing changes in the way people buy art, which is directly from the artists online. Due to the cost of purchasing a good fine art printer falling over recent years, the artists are no longer reliant on publishing houses for printing and distributing their art, instead buying their own printer for personal use, or even getting together as a collective to buy one. The growth in the throwaway art from big box stores has also had a major impact on art sales, as the smaller galleries and framers can no longer compete on price at the lower end of the market. According to Supplier 1, the trend for box canvas pictures that didn’t require any framing and was cheap to replace, helped to kill the framing trade in the mid to late 2000’s. Although many framers offered a stretching service for work on canvas, these box canvases, already stretched, were being imported in vast numbers from Asia and sold cheaply. These cheap pre-stretched canvasses are also being sold in a blank format directly to artists, quite often online, therefore reducing OMEs income from this area of sales. It’s also had an impact on other artists supplies, with many artists now buying art materials online rather than local.

The owner of Business 9 only works in the shop part-time as he also has other business interests – he works 2 or 3 days a week and a partner in the business works the rest of the time. However, he did say that he was glad that he wasn’t ‘sitting in the shop five days a week waiting for people to come through the door’, as he felt that he would get very bored waiting for customers, pointing to the fact that there was an art gallery a few shops away from him doing just that and was closing due to poor sales of art.

Businesses 3, 4 and 6 also used to produce and sell large quantities of ready-made frames for both themselves to sell and to supply to other businesses, but this market has also been taken by the big box stores, further increasing the framers reliance on the bespoke elements of the business. Examples provided by the business owners of this loss in trade include Business 3 who used to sell ready-made frames via their own market stalls but which they no longer have; Business 4 used to supply the likes of their local football club who used to buy certificate frames in large numbers, but don’t anymore; a big box store opened opposite Business 6 who used to sell ‘about 10’ readymade frames per week, but was now lucky to sell one per week, even though the big box store has shut down.

Business 10 stated that the decline of his local town centre has resulted in far less people walking past his shop front therefore potentially affecting impulse buys. Business 11’s owner stated that he wouldn’t be interested in re-locating to his town centre due to, in his opinion, the falling numbers of people using the shops there, which was leading to further closures. On top of that, he feels that the rent and rates are too high.

Pricing structure variations

The variety of locations that picture framers operate out of leads to a variety of profit margin structures. Home framers such as Business 7 operate on a tiny profit margin of about '20%', whilst others strive for 300-400%, or even higher in some cases. However, Business 11, which operates from a semi-retail position, also operates on a very small profit margin as he feels that his customers won't pay any higher a price. Similarly, Businesses 1 & 4 feel that due to the location of their shop (Business 1) and factory (Business 4), and the general look of the businesses inside, they can't charge high prices either, preferring to offer a limited range of stock but buy in bulk to keep costs lower. Business 6 also buys in bulk to keep his prices down due to the impoverished state of the town that his shop is in, whilst Business 9 prefers to operate on a stock according to order basis. This range in pricing strategies was raised as an issue by Supplier 6, as the public have no idea on the cost of framing when it can vary by £100's per frame, depending on the strategy adopted by a business owner and the location of the business.

However, Supplier 7 contradicted what was happening in Businesses 1 & 4 when he said that in his 30 years in the trade, he had seen a big reduction in the amount of bulk buying that went on, especially at the bespoke level of customer who were preferring to stock according to order – essentially operating a just-in-time (JIT) system. Supplier 2 had also said this to the researcher in the past, due to very few framers now operating on a 24-hour turnaround basis.

5.2.2 - What, if any, are the growth drivers of picture framing businesses in the North East?

To check the results of previous authors, the respondents were asked about their background in terms of experience, training and education, and whether these were important factors when considering growth drivers?

Level of education

In line with the practice of adaptive research, this line of enquiry stopped as a dedicated question after half of the respondents were interviewed, as it quickly became evident that the level of education for picture framers is irrelevant to success or as a growth driver. Business 9's owner had a degree in Photography, whilst Business 4's owner had no formal qualifications. Business 1's owner did complete his secondary education whilst Business 5's owner had completed an equivalent of a pre-degree qualification.

Training

Training wise, Business 5's owner went through the FATG training programme, as did Business 8's owner who had specialised in conservation framing, whilst Business 1's owner was learning as much as he could from YouTube videos. Businesses 1, 2 & 7 expressed a desire to make things which led them to the picture framing trade as they get to work with their hands – it's what drove them on and encouraged them to learn new skills as they went along.

Experience

Six (50%) of the respondents had some picture framing experience, either as a framer or framing business owner prior to setting up their current framing business. A further 3 (25%) of the respondents also had some experience of employment where some of their skills were directly transferable to picture framing, whilst another respondent had senior managerial experience in an administrative role allowing her to deal with the required paperwork easily (Table 16).

Table 16 – Levels of experience gained before setting up their current picture framing business

Source: Author generated

Type of experience	Frequency	Business	What type of experience gained
Framing experience or transferable skills	8	1	Minimal experience in the building trade.
		3 & 11	Worked in the family business before inheriting it.
		4	Well experienced in the glazing industry as a cutter before opening the first of three different framing businesses.
		8	Gas industry engineer so is used to measuring things.
		9	Is a photographer and had a framing business prior to the current one.
		10	Came from a sales background before becoming a director and shareholder of a framing business, then owner of the present one.
		12	Trained by another framer for several years.
Administrative experience	1	7	Administrative experience gained in the NHS.
Interested in working with crafts	1	2	Had worked as an accountant and a farmer.
No experience	2	5	Had trained as a barber.
		6	Had retired from the RAF.

How long have they been trading?

As can be seen in Table 17 there is a good spread in ages of business.

Table 17 – Length of time the owner has run the current business

Source: Author generated

Number of years with the current business	Number of owners	Business
< 5 years	3	1, 3, 5
6-10 years	1	10
11-15 years	3	4, 7, 9
> 15 years	5	2, 6, 8, 11, 12

Business 1 was bought as a going concern, whilst Businesses 3 and 11 were inherited from close family members upon their deaths. The remaining nine businesses were all set up from scratch. 50% of the OMEs said that they had no desire to grow their business as they were happy with where it was. Three of the OMEs that have tried to expand in the past are now looking towards retirement (Businesses 2, 4 & 6) so have no interest in growing the business any further, whilst two of the keenest proponents of growth were the youngest owners interviewed (Businesses 1 & 3). Business 5's owner had been keen to expand with his life partner set to run an additional outlet, but personal reasons caused him to downscale the business to a home based one that would fit around his new home demands.

Businesses 1 & 3, who had been involved in their business for less than 5 years, were interested in growing their businesses over the next few years, with both OMEs expressing a desire to expand into an area with wealthier clientele without damaging their current customer base. Business 10 had been set up to take the owner to retirement, which was imminent, whilst Business 4's owner had no interest in trying to grow as he'd 'Done that, got the T-shirt' in the past – echo's here of OME4 from the pilot survey.

What is their motivation?

As can be seen in Table 18, enjoyment of their work was clearly the main motivational factor, hence the likes of Business 6's owner working into his 80's, stating that 'I never fail to want to get up and come to work. It's not for the money, I don't need it'. Business 2's owner is into her 70's and, although she would like to retire, she still enjoys working with her established customers and dealing with the challenges that she's given. The only obvious exception to the enjoyment element was Business 10 who's owner was 'tired' of the trade after over 30 years working in it - he was looking for a retirement option.

Table 18 – Motivational factors that kept the business OMEs going	
Number of Businesses	**Motivational factor**
7	Enjoyment of the work
4	Production of a quality product
2	Desire to be self-employed
2	Experience of working in the trade
1	The challenge of some of the jobs
1	Invested so much money over the years that they wanted a return

It's interesting to note that not one of the respondents was motivated by profit, even though the potential mark-up can be very healthy as a picture framer. The prime motivational factors were based around the enjoyment of the job and the challenges that are presented on a regular basis. As Business 2's owner said, the actual 'basic tasks of picture framing can get boring and repetitive, it's the design side that's interesting', especially the challenge of unusual tasks. Other owners such as those at Business 12 enjoy the 'big reveal' to the customer when they come to pick their work up, when that vision that was sold to the customer during the design phase is brought to life and the customers face lights up with enjoyment.

This enjoyment of the work was also highlighted in statements such as Business 1's owner saying that it was because he enjoyed 'working with his hands', and Business 7's owner backing this up, adding 'It's better than pushing bits of paper around'. Business 4's owner stated that they 'enjoyed working with repeat customers as they got to know them over time, some even becoming friends', whilst Business 12's owner stated that he 'loved the fact that you rarely saw the same piece of artwork twice, and if you did, it would be done a different way'. Business 11 isn't doing very well financially but the owner enjoys the work so much that he is willing to take a financial hit to keep trading, but he does have another income stream from other employment to soften the financial blow.

Two of the respondents, Businesses 4 & 10, had had picture framing businesses prior to the current one and, although their original businesses had ceased trading for one reason or another, they had enjoyed working in the trade so much that they simply set up a smaller operation that would get them to retirement.

Linked to the enjoyment factor is the production of a quality product, with Businesses 2, 5, 8 and 12 all declaring that this was one of their prime motivational factors. Businesses 2 and 12 also went as far as to say that to be a good picture framer, you had to be 'a perfectionist'.

Only two businesses, 5 and 7, stated that one of their main motivations was the desire to be self-employed. Business 5 was tired of working for other people and had intended on opening a barber shop, which is his background, before deciding that a gallery would be a better option in the premises that he'd found, which was more of a push factor: whilst Business 7, following redundancy from a senior administrative role within the NHS, saw the chance to take over a business that her friend, who had recently died, had started (also a push factor). Being your own boss may have been their motivation when setting up the business, but both admitted that that motivation had changed to one of enjoyment once they had got up and running.

Do they plan to expand? If not, why?

Only two of the businesses expressed a desire to expand their businesses, a point that was of no surprise to Supplier 7 who has found that few businesses are growing, especially home framers expanding into a high street position.

Business 1 expressed an interest, in future, of opening a second outlet, or relocating the business to a more affluent area, but hadn't given it a lot of thought as he was a new owner to the business and was focusing on learning how to run the existing branch. Business 3 would like to open an additional gallery and framing business if he could find the right location in an affluent area, that was close enough to the existing branch to operate as a satellite operation, with framing for both branches being done at the original site. However, he did also express the importance, and problem, of having the correct staff who possessed the correct skills and aptitude to manage it. As he said, 'It's not like having a card shop where customers come and pick a card and pay for it' – the job of a framer entails design skills and experience of working with art and paper-based products. These latter two points, location and staff, were posing major barriers to growth at the time of the interview.

Business 5 was looking to open a second gallery and framing outlet in a near-by town to his original base, with a view to his life partner running it. However, his partner had a major stroke which ended both the expansion plans and the original gallery as he now had to be at home to take care of his partner. He was therefore downsizing his business to become a home framer, operating on a very small scale and around the care needs at home.

A further three businesses had expanded in the past, either with their existing business or with a previous one. Business 2 had expanded in her original location by moving out of her parents' house in the 1970's and into a factory unit in a city centre location, and then moving again a year or so later into a retail position within Newcastle where she remained for 30 years. Further expansion occurred when she moved into two extra retail units, within the same location, so that she occupied the whole of the ground floor of an office building but was still able to operate it on her own. She attempted to expand further in the 1990's by going into the wholesale side of the business, opening a factory unit in Gateshead alongside her Newcastle city centre gallery and framing business. However, after the first manager took all the customers with him when he left after a year to join another company, and the second manager was poached by another picture framing business, the wholesale venture was ended.

The cost of rent for Business 2, which by the end of her lease in 2008/9 was £630 per week, became a problem, especially on the back of a failed sale of her business at about the same time, which led to her relocating the business to a rural factory unit which, in 2022 only cost her in the region of £450 per month, and where she still operates from in a semi-retired form (the owner is 71 years old), and is near to where she lives. She never attempted to grow the business after moving out of the city centre location because of her age and prior experiences.

Business 4's owner, who's had two other framing businesses before the current one, did grow his second business in the 1990's up to a point where they were employing three people and had a turnover over £100,000, but that business collapsed in 2009 with the loss of the contract framing side of trade to the big box stores. In his current business, he was not inclined to grow it beyond a husband-and-wife team as he's 'been there, got the t-shirt' and found the paperwork costs involved in hiring staff erroneous. He also found the VAT element extremely time consuming in terms of the accountancy/paper work involved and costly in terms of the VAT that he had to add to his prices, therefore pushing them up, and timewise to complete the paper work. On top of these barriers to growth was their age, as they were both approaching retirement age and, when the interview took place, they were in their final month of trading before going into semi-retirement.

Business 6 was started in the late 1970's and grew from humble beginnings where he sold cheap, imported oil paintings in one day sales in places such as hotels or airports. He opened a gallery and framing business in the 1980's, eventually employing staff to help with the manufacturing side of the business. He had also tried opening another shop in Hartlepool several years ago, but staffing issues at his original shop caused him to lose money at the original site and led him to close the Hartlepool one down so that he could focus on the original, profitable one. The owner stated that if he was younger (he's 81 years old and still working on the sales side) he would still be interested in expansion, but not now – he's 'too old'.

Business 6 felt that one of the main reasons for the failure of his attempted expansion was that his manager, whom he'd employed for some time as a framer before promoting him to the manager, was opening later, closing for lunch, and closing earlier at the end of the day. These staffing issues when expanding were also mentioned to the researcher in a discussion with Duncan McDonald of All About Framing, a local wholesaler, art gallery and training centre based in High Wycombe, Buckinghamshire. Although not based in the North East, he found similar problems to that reported by Business 6 in that he hadn't factored in that employee's tended not to 'go that extra mile' that entrepreneurs are willing to go to when operating in a satellite branch - one of the reasons he gave that, although he'd expanded to six galleries of his own, led him to shut them down and re-think his expansion strategy.

The remaining seven businesses all said that they had no plans for expansion, just as was found in the pilot research. Nor did they envisage any expansion due to one or several of the barriers to growth shown in Table 19.

These barriers to growth were summarised neatly by Supplier 2 when he stated that, in his experience, his customers had found it 'hard to grow to the next level' due to the increased costs of the larger premises and staffing issues such as having to employ extra people to provide cover for planned and unplanned absence.

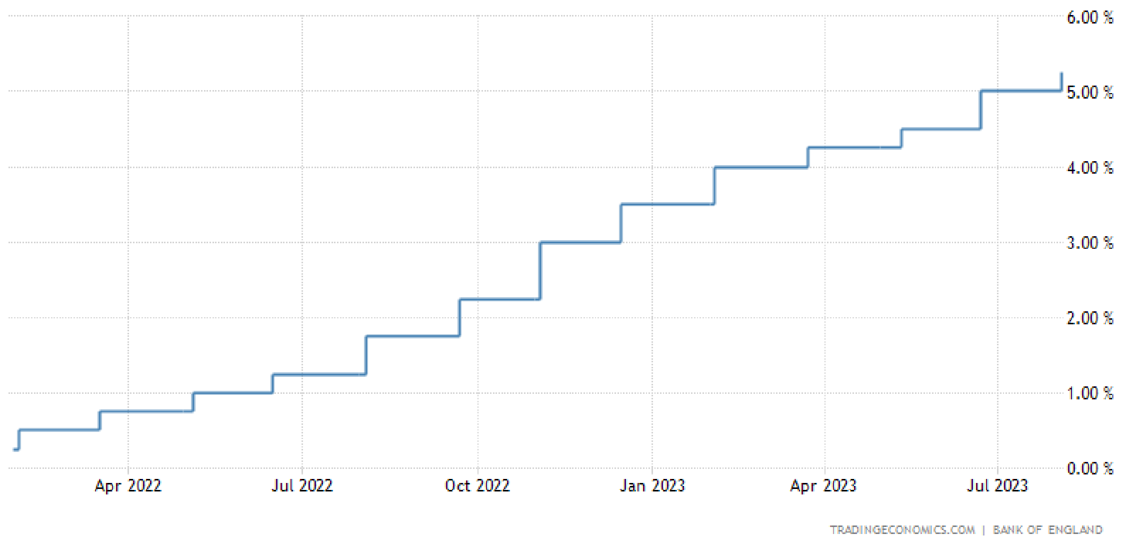
Table 19 – Barriers to growth as reported by bespoke picture framing businesses in the North East of England	
Barrier to growth	**Affected by**
Economic	Uncertain economic situation due to rising costs. After effects of Brexit. Time delay in payment from large customers. Landlords wanting long-term leases. The cost of rates. Crossing the VAT threshold increases prices and costs.
Changing customer base	Few contract customers and market traders buying from bespoke outlets. Art clubs were closed during Covid 19 and haven't returned to bespoke framers in the same numbers. Photographers now tend to go to one-stop suppliers online.
Location	. Located in an economically deprived area. . Trying to find a second outlet that's close enough to travel to, but far enough away from the first branch to avoid watering down of customer base. . Current building is unattractive to the higher end customer. . Rents are too high in high street locations.
Satiation of motivational objectives	. Happy to remain a home framer or one outlet business.
Family/lifestyle commitments	. A change in home circumstances has required a change to home framing at a minimal level. . Planning a marriage and family took focus away from expansion. . Wanting to retire or semi-retire.
Employing staff	. Costs of employers National Insurance Contributions (NIC). . Problems finding the right person for the job in terms of skills and aptitude.
Increased red tape	. Increased complexity of the paper work requirements when VAT registered or employing people.
Local government	. Unsupportive local government.

Economic barriers to growth - Since 2020, the UK's business sector has suffered several black swan events that have caused demand shocks in the markets – Covid 19, Brexit, a war in Ukraine and three Prime Ministers with very different approaches to government, in as many months. Businesses had plenty of warning about getting prepared for Brexit, but the increase in paper work and import costs, on top of the trading problems created by the other three events, all combined to create a very uncertain business environment in an economy that's seen a very sharp downturn (Businesses 1 & 4).

Brexit, the increased cost of oil due to the war in Ukraine and increasing inflation (which was exacerbated massively by the poorly received government policies introduced by then Prime Minister Liz Truss by the worlds markets (Image 23), have all increased the cost of raw materials and the costs of running a business, making what is already perceived as an expensive item even more expensive. The owners of picture framing businesses have been left with a difficult decision – should they pass these increases on to their customers or try to absorb them for fear of losing business, as is the case for Business 11 and a question posed by Supplier 7? The likes of Businesses 6, 10 and 11 operate in an economically deprived area so are reluctant to raise prices, whereas other businesses, such as Business 9, operate in a more middle-class area and have been able to increase the prices without it affecting top end sales too much - although this has had an impact at the lower end of the market thus proving the dilemma for the likes of Business 11, who's main income is derived from the lower end of the market.

Image 23 – Interest rates for the UK April 2022 – July 2023

Source: *United Kingdom Interest Rate - 2023 Data - 1971-2022 Historical - 2024 Forecast*, no date)



Business 2, although primarily a bespoke picture framer when they were based in Newcastle, did grow in reputation to the point that larger customers were attracted to it.

This then introduced the problem of getting the payment from them, as many large businesses only settle their accounts quarterly, which can then create cash flow problems for the smaller business, especially if they are geared up for bespoke customers who pay on pick up. Some larger businesses may even refuse to pay or go out of business before they've settled the account, thereby causing problems for their smaller suppliers. This is exactly the situation reported by Business 10 and that resulted in the end of his first business, as they were owed £90,000 by a customer that went out of business, and the bank then stopped Business 10's overdraft facility as they were concerned about the bad debt. This put further pressure on their finances until they had to stop trading as well.

Another economic issue raised by Business 4 is the problem of landlords trying to get tenants to sign a long-term lease. Many micro businesses operate on a day-to-day basis, therefore being tied in to a five-year lease, or longer, becomes a major issue when their planning consists of surviving month to month. Businesses such as Business 4, who are approaching retirement age, simply aren't interested in this kind of long-term commitment and, given that 75% of the business owners interviewed were over 50 years old, which is normal for the industry according to Supplier 6 who stated that the average age of his customers is 55, the problem of signing long-term leases in an economically unstable environment must be relevant to many micro businesses. In the case of Business 4, it has resulted in the owners making the decision to close their business completely and go in to semi-retirement, joining forces with one of their customers in another town who is also looking at semi-retirement.

Business 3 stated that one of his concerns was about the cost of rates on top of the other fixed and variable costs if he were to expand to a second branch. Because he operates out of an old factory unit at present, he does benefit from free rates however, he feels that if he was looking at an additional outlet on a high street in a more lucrative area, then the cost of the rates 'could be equal to, or more than, the cost of the rent'.

Business 9 is concerned about growing his business to the point that it crosses the VAT threshold, which is currently set at a turnover figure of £85,000 in the UK, as this means an increase in the prices that he would have to charge his customers. This means he'd have to bring in a lot more business to cover any lost business due to the increase in price. It would also bring in extra costs for accounting as it would become more time consuming. He feels that there should be a lower rate of VAT payable for those small businesses with a turnover of say '£85,000 - £125,000', as he feels that the current VAT rate of 20% is a big increase to 'force onto small businesses'.

Changing customer base - Business 4's owner lost their previous business when the contract side of the trade contracted severely, with customers such as training companies no longer coming to his business for their certificate frames, but rather going to one of the big box stores that were buying them in from abroad. This loss was also coupled with the loss of market traders who also found that their customers were now using the big box stores for standard size frames. Hence, when he set up his current business he focused on the bespoke side of framing, purposely downsizing from his previous one, and dealt with the odd contract job as and when it came in.

Another more recent issue for Business 4 is the loss of photographers who now tend to go to one-stop shops online for their printing and framing, as well as being offered their own website via their suppliers. Although the photographers are sacrificing choice due to the limited options that these online companies offer, they balance that against the ease of use of the system, as they leave all the framing options up to the online company, along with delivery, and then receive a commission payment for doing nothing other than taking the initial photograph. This is much easier than taking all the framing samples to the customer and then having to go to the framer to get it made, then returning to pick it up and deliver it to the customer.

The Covid 19 pandemic also led to the closing of art clubs which used to be another good income stream for Business 4. However, although the art clubs are now open again, the only trade that they are getting from them is 'a few mounts when there is an upcoming exhibition' – the artists seem to be reusing old frames or are buying them elsewhere, possibly the big box stores. This is despite Business 4's owners being active members of the local art scene in the past, even organising events at local venues for the arts community, therefore demonstrating the failure of networking to help grow the business.

Business 11 has found that he was getting more and more people coming in and asking for a single mount to be cut that would fit the frame that they'd bought elsewhere – usually a big box store. This meant that he would have to cut into a sheet of mountboard for something about the size of 10 x 8 inches and which he would only charge a few pounds for. It also meant that he may not have enough of the mountboard colour left for a larger job later, thereby forcing him into buying yet another sheet. As a result of this, he's stopped offering this service and now only produces mounts for complete frame packages. It has resulted in the reduction of some of his business but has also reduced his costs of material.

Location **-** As already mentioned in Chapter 1.4.1, the North East of England has its fair share of economically deprived areas, and Businesses 6, 10 & 11 all stated that they had found that this was a barrier to growth for them. Businesses 6 & 10 have purposely kept their prices low to try and maintain trade, with Business 10's owner stating that if he'd put his prices up in line with the increases in the trade and in the cost of power, then he was very concerned that he wouldn't get any business at all, let alone enough to consider expansion either through employing people or a larger premises.

Both Businesses 10 and 11 lamented the decline of their local shopping areas, with Business 10's owner stating that he 'now has to travel several miles to get to his local bank branch as there are no banks left in his town'. Business 11 is in what used to be a vibrant local shopping area on the edge of the main town centre but stated that most of the shops surrounding him were now 'shuttered up permanently', thereby making the whole area less attractive to customers. There has also been a general move away from highly visible city/town centre locations by picture framing businesses, with the researcher's findings showing that there are no longer any picture framers in the main retail areas of Newcastle, Sunderland or Middlesbrough. This trend was confirmed by Supplier's 6 & 7, with Supplier 6 feeling that this move away from the city/town centres is being driven by the rising cost of rent and rates.

Business 3 was more upbeat about the idea of expansion but was concerned about finding the right location that will draw in new customers whilst not watering down the customer base of the original location. This meant that it would have to be 'far enough away from the manufacturing point, but still within a reasonable travelling distance for delivering stock'. On top of this, as the current branch operates out of an old factory unit which only appeals to the lower end of the market, and he's seen the decline in demand and closure of his father's former shops and market stalls in the town over the last 10-15 years, he's only interested in trying to open in a more affluent area.

Business 1 also picked up on the point of affluence, pointing out that his town wasn't known for money, therefore what's the point in investing heavily in making his current shop more attractive? Although he's acknowledged that it does need to be re-decorated, he's also got an eye on possible re-location in future to a more affluent area. Business 11 is also in a poor state of repair, with the current owner never having done anything with the workshop/gallery area since inheriting it from his grandfather. He does own the building so investment could be worthwhile for future use, but as the business is not generating a large income he's reluctant to do so at the moment.

When Business 11 was quizzed about possibly re-locating the business, he cited the 'high cost of property rental' in his town centre as the main obstacle. He backed this up with the declining state of the town centre and the falling footfall because of shop closures, believing that most people that went to the town centre area were 'going for the Metro station' (mass transit system), not the shops. Therefore he couldn't see how he could meet the extra cost of 'inflated' rents. He added that he knew other business people that had moved out of his town to one of the nearby cities to get a lower cost unit to rent and increased customer footfall.

Satiation of motivational objectives - Although Business 7 was originally set up to be a fully-fledged framing business in County Durham, the owner and her husband were fortunate enough financially that they could retire in their early 50's to rural Northumberland. Therefore she doesn't want to be anything other than a home framer operating out of a converted stable block in their garden.

Business 8 was set up as a home framer to minimise overheads, and therefore it doesn't matter if they are not particularly busy. They have a pension from previous employment so have never really worried about making a lot of money out of the business.

Business 12 was originally a father and son operation, with the son having been trained at another framing operation. Upon the father's death, which was over 30 years ago, the son's wife came in to the business as well, happily working together since then and, as the business always generated enough of an income to keep them both, they've been happy to remain a husband-and-wife team operating from the one location, with no employees.

Family/lifestyle comitments - Family commitments can often determine what we do in life. In the case of Business 5, he was set to expand to a second branch, with his life partner due to run it. However, his life partner had a major stroke which left him reliant on others for care, resulting in Business 5 downsizing to a home framing business that's run on a part-time basis. Similarly, Business 3's owner had things going on in his life that was stopping any expansion. He'd been planning a wedding during 2022 when the interview took place and felt that he couldn't really give the time to planning an expansion and training new employees that it would need. Therefore, any expansion plans were on hold.

An important statistic provided by Supplier 6 was that, of his customers in the North of England, the average age of the owner is 55. Several suppliers reported a lack of younger people entering the trade, which was echoed in this research, with 66% of the respondents being over 50 years old. This means that many framers are either looking at retiring in the not-too-distant future as they approach retirement age (Businesses 4, 10 & 12), have taken early retirement from their previous employment and are now running the business as a side line (Businesses 7 & 8), or are past retirement age but are still working in their business anyway either because of necessity or enjoyment (Businesses 2, 6 & 10).

Employing staff - Fielden *et al* (2000) stated that small businesses were often reluctant to employ people, and so it has been found to be true in this research, with only two of the businesses interviewed employing any staff, both on a part-time basis, and only one of them in an official capacity. Business 4's owner, who has employed people in a previous business cited his reasons as the increased costs and bureaucratic red tape when employing people in terms of employers NICs.

Finding the correct person to employ, who has the correct skills and aptitude to be able to sell, design and communicate with customers, were all cited as barriers to growth by Businesses 2, 3, 6 & 9. They were not insurmountable, but as Supplier 6 said, he'd found that those bespoke picture framers that had expanded had often regretted it due to staffing problems. If it was a 'husband-and-wife business, then they could quite often operate an expansion successfully with each of them based in one of the branches'. However, as soon as the business owners started considering employing staff, it introduced new problems such as how to deal with absences, planned or not. In reality, 'they would need extra staff to cover absences than they needed to operate the business', thereby increasing costs further.

Increased red tape - The owners of Businesses 4 & 10 have both had experience of the increased paper work that crossing the VAT threshold introduces and felt that the hassle with VAT repayments to His Majesties Revenue & Customs (HMRC) isn't worthwhile growing for. HMRC carry out a complete audit of the businesses accounts every three years which may, or may not, result in the business having to pay more VAT or claim a rebate for overpayment, all which takes time and creates stress for the OMEs.

Local Government - Business 4 has found their local authority unsupportive over the years, twice having been forced out of an established location for planned redevelopment of an area, the second plan of which never came to fruition, but they'd been forced to move anyway.

What are your keys to success?

As can be seen in Table 20 a range of answers were provided to this question.

Table 20 – Aspects to success as mentioned by picture frame business OMEs in North East England

Source: Author generated

Branding	Market Knowledge
Choice	Price
Continuity of stock	Quality
Design process	Relationship with customers
Location	Speed

Branding - Business 9 felt that one of their keys to success was their branding, which states clearly that they are picture framers – not a gallery that does a bit of framing. A further six of the businesses visited used the word 'Framing' or similar in their business name, backing up Business 9's thoughts – it's the Ronseal approach to branding (Shelton and Whiston, 2012; *The Ronseal Phrase*, no date) as they do 'Exactly what it says on the tin'. This contrasts with three of the other picture framing businesses that used the term 'Gallery' in their name, suggesting that they are something other than a picture framing business. One of the businesses names didn't utilise either of these terms, but implied that it was the supplier of high-quality art, not framing, whilst the 12th business simply used the owners names. Business 9 also used a simple, large yellow logo on their shop window which they thought was eye catching when people walked past. This idea of a logo on the business premises was not utilised by any of the other picture framing businesses visited.

Choice – This was also chosen by Business 9 as a key element to their success. They have lots of chevrons on the wall displaying the different options that customers have when it comes to the actual frame, as well as mountboard chevrons in a variety of colours on display. Although this choice allows customers to examine a wide variety of options, Business 9's owner did also say that they probably only use 'about 12 frames on a regular basis, the others being one off's or not used at all'. Businesses 2, 6, 8 and 10 also had a large display of mouldings on the wall, with Business 2 admitting that there was probably 'too many on the wall' as she doesn't like to allow her customers to take too many off the wall at once to look at, as it causes indecision which leads to time wasting. She finds that invariably they choose her first option. This choice of options being on display is in stark contrast to other framers such as Businesses 1, 3, 4, 7 and 12 who only display a limited number of chevrons, although they do have others tucked away 'under the bench' if they are needed.

Continuity of stock – This was raised by Business 6 as he felt that his customers came back to him if they were trying to match a frame up against one that had been done a year or two earlier. This has led him to try to identify his best sellers and buy larger quantities of them, thus also getting them at a cheaper price. Business 8 also raised the issue of continuity as they have an artist that buys her frames from them and who insists on having the same moulding on every piece of work that she produces, regardless of whether it matches or not.

Design process - Businesses 2 & 8 felt that it was their skills as a designer that brought people back, with Business 2's owner stating that she believed that this was the hardest part of the whole framing process and that it was a skill that marked her out from other picture framers in the area. Business 8, which is a husband-and-wife team, stated that the wife was very good at designing the frame package for items such as needle works which customers always seemed impressed with.

Location – This was raised by both Businesses 9 and 11 as an important factor. Business 9 is located within a busy shopping area in the middle of the town and has a lot of passing footfall as it's a pedestrianised area within an old railway station. The business has large windows facing out on two sides of the premises onto the main pedestrianised area and in which are a variety of framed works and other craft items on display. Business 11 is not in a town centre position, but above a row of shops on a main road into the town. The important aspect from the owners perspective is that there is ample free parking around the business premises so that customers don't have to carry their pictures, which can be large, very far – especially on wet and windy days.

Market knowledge – This was felt to be an important success factor by Businesses 7 and 8, with Business 7 saying that it was important to know what your customers wanted so that you could give suggestions. This included the use of different types of mountboard and glass in different situations as well as knowing what else is available other than what's in stock.

Business 8 said that customers would often put them on the spot by saying things such as 'Well you're the expert, what do you think?', and would leave the decision to them.

Price - Nine of the business owners (1, 3, 4, 6, 7, 9, 10, 11 & 12) thought that price was an important element, with Business 11 highlighting the rates of unemployment in his town being a factor that affected his pricing strategy, whilst Businesses 1, 6 & 10 also highlighted the problems of operating within an economically depressed area and therefore having to watch their prices carefully. Business 12 did admit to having some wealth in the area but also pointed out that rural poverty also affected them. But, as already stated, there is no standard pricing policy for picture framing. Therefore, what one business considers a fair price based on their costs, wouldn't be fair for another business. Price is a very emotive topic affected by several aspects.

Quality – This covers both service and the finished product. A 'quality service' was quoted by Businesses 6 & 7, and Supplier 2, as being the most important driver for success. Business 6 felt that he'd always been 'very obliging' with his customers and always 'strived to do his best for them'. The level of services offered was also an important aspect for Businesses 2, 11 & 12, offering services such as wash lining (decorating the mounts with lines) which they do by hand, whilst Business 12 stated that they have a good reputation for 'framing three dimensional objects'. Hand in hand with quality comes perfectionism, with Business 5 declaring that every element of the framing process had to be perfect, 'even down to the way that the frames were sealed at the back', whilst Business 12 said that this level of perfection 'couldn't be allowed to slip', even if it meant re-doing the whole job. Businesses 1, 5 & 9 also made this link between perfectionism and quality. Business 12 believed that it was their attention to detail that led to high quality framing, which was what brought customers back, as well as helping to spread the word about how good they are through word-of-mouth advertising.

Relationship with customers – Business 1's owner was very keen to highlight his ability to talk to customers at the correct level. He felt that if customers get on with the OME, then they tend to return. This view was also backed up by Businesses 4, 10 & 12 with Business 4 finding that some of those customers became friends over time.

Speed - Businesses 6 & 11 both stated that speed was an important aspect of their success, with most of their jobs being completed within a day of receiving the order. Business 2 also mentioned that she works within this timescale as well, although it wasn't highlighted as a factor in her success. This obviously means that, to maintain this rate of turnaround, they must be carrying a large level of stock of all items. Business 2 did admit that she tends to buy in bulk to achieve the lowest price possible, but that this has led to her still carrying mouldings that are 30 years old because they were bought in bulk and have gone out of fashion before she could use them up, thus tying cash up.

Problems found whilst trading

The OMEs provided a range of answers to this question (Table 21).

Table 21 – Problems that picture framers in the North East are facing Source: Author generated		
Problem	**Business affected**	**How it's affected**
Supplying larger companies	Business 2 Business 10	Larger companies can be slow at settling bills which causes cashflow issues.
Dealing with multiple suppliers	Business 2	Each supplier has a minimum order level.
Quality of moulding – size and colour	Business 9 Business 11	Colour and size variation means older stock can't be used up = cash tied up in useless stock.
Economic challenge of operating in a deprived area	Business 11	Is reluctant to raise prices due to the potential loss of customers. This affects profit margins.
Confusion due to a competitor having a similar name	Business 11	More a problem for customers than the owner.
Moulding profiles are changing quickly	Business 12	Causes re-stock if trying to match a previous job or complete one.
Lack of sales representatives/no internet connection	Business 12	They find it hard to keep up to date with changes to suppliers ranges.

Business 2 said that one of the problems that she'd encountered when dealing with other, often larger, businesses was that after supplying the frames within the given deadline, she'd then have to wait several months for payment which caused cashflow problems. Another problem that she'd faced was dealing with so many suppliers, all which had minimum order levels to hit before she could order off them and therefore affecting her JIT orders. She could alleviate this problem by ordering stock items to make the order up, but this then increased her stockholding which tied cash up.

Business 9 said that recently they'd been having problems with the quality of the moulding in terms of colour matching and in size. This had resulted in a lot of offcuts being produced that then couldn't be used in any other bespoke frames due to the colour or size mismatch. Therefore, there is money tied up in useless moulding that can only be used to produce cheap little frames for sale in the shop. This quality issue has arisen due to the changes in manufacturers used by UK wholesale suppliers, as reported by Suppliers 1 & 2 - some wholesalers have simply asked for copies of their good sellers which don't always match up with the old manufacturer. Business 11 also reported the same issue and as a result has switched totally to plastic mouldings which are more consistent in colour and size. A bonus to this decision is that he now avoids the minimum purchase order problems faced by Business 2, as he has reduced the range of mouldings on offer and only deals with one moulding supplier.

Business 12 reported that they find that moulding profiles are changing a lot quicker than they used to, with production of some of them ceasing totally. This is a problem when trying to match framing to work done previously for the same customer, or when they only have enough moulding in stock to do three sides of the frame and need a bit more to finish it. They also said that keeping up to date with new and old mouldings etcetera was getting harder as they had no internet connection and didn't see many sales representatives anymore, as their suppliers had stopped using them (as confirmed by Supplier 5 whom Business 12 uses).

5.2.3 - Do North Eastern picture framing businesses carry out any strategic business planning to help growth/survival?

The answer to this was a unanimous no. Even Business 7, who had sought help from a business support agency at the start of her business, said that she abandoned strategic planning very quickly. As Business 5 said regarding setting the business up, 'It was all done on a whim'. Business 5 does recall being asked for a business plan when trying to open a bank account, but he never did one.

5.2.4 - What business support have business owners found in the North East which could aid their growth/survival?

Only Business 7 stated that they had sought any advice from a business support agency upon setting up and found the whole process 'really helpful'. She went on to say, 'That was a really good group to be part of, it kind of just helped me with the kind of business planning, job planning, bookkeeping'. Coming from a senior NHS administrative background, she found this element of running a business easy to pick up. No further advice has been sought as she retired early and now operated as a hobby framer, which wasn't the initial intention, in a different county to that which she set up in. In fact, she wasn't even sure if there was any business support agencies in her area, which is rural, a point also raised by one of the respondents in the pilot research who was based in the same county as Business 7.

Businesses 4 and 12 stated that they had got grants many years ago to help pay for equipment. These grants were paid retrospectively in that they had to buy them first and then claim the money back, with Business 4 reporting that the paperwork required for this was onerous to complete – but worth it. However, they had to have the money in the first place to buy the equipment, demonstrating the problem faced by some micro businesses when applying for funding.

Three said 'No, they had never sought any support', with Business 5 stating that 'It was very impulsive [*when he set up*], and it was a case of all my previous jobs in my life gave me a little bit of something' - in terms of the skills and knowledge required to set up and run a business.

The other eight businesses were all well established, and it became obvious during the discussion that they hadn't felt the need to approach any business support agencies throughout their time in business.

However, Business 1 did state that it's something that he may do in future if he wishes to move to another premises or buy any new equipment. He has been getting a lot of support from his father who has had some experience of self-employment, so didn't feel the need to seek further advice at the moment.

Why set up in the North East?

All 12 of the respondents were born and raised in the North East and had never considered setting up anywhere other than where they lived. They may not live in the same town as their business, but they live close by. These findings backed up those in the pilot research.

5.2.5 - How have picture framers in the North East been able to source finance to both set up and grow their business?

The answers to this question as shown in Table 22 were very interesting.

Table 22 – How the OMEs of picture framing businesses sourced their initial setup finance

Source: Author generated

Source	Number of respondents
Own savings/redundancy	9
None needed due to inheritance of business	2
Parents	1

Businesses 3 & 11 were inherited, so no money was required to get the business started, nor have they borrowed any money to buy any new equipment. Business 1 was funded by his parents who bought an existing business for him as well as any new equipment that was needed. Businesses 4 & 7 invested redundancy money into the initial setting up of their businesses, whilst the other seven businesses all used their own savings to fund the establishment of their businesses. Therefore none of the businesses were set up using an external financial source.

Business 2 said that she had borrowed money from a bank 30+ years ago to purchase equipment but hadn't borrowed any since then.

None of the other businesses reported using any other sources of finance, other than personal savings or retained profit, to fund either the purchase of new equipment or pay for stock. Even Businesses 2 & 6, which both expanded to second branches in the past, funded the expansion through the retained profit from the first outlet.

Has finance limited their growth potential in any way?

Although none of the respondents specifically stated that a lack of finance had restricted growth, Businesses 2 and 6 both stated that they had not invested in new equipment, such as a CMC, due to their cost. Business 6 already has a CMC which was bought outright several years ago however, he was interested in replacing it as the manufacturer of his present one, Wizard, have closed their UK depot and he's finding long delays in parts coming from their German base. Therefore, he did investigate replacing it but has found that neither the suppliers of Valiani nor Gunnar machines are offering any form of rental or hire purchase schemes, thereby making the outlay cost too high. One supplier did offer him the opportunity of paying the machine off in three monthly payments, but as the new CMC's are very expensive, he felt that he couldn't warrant that kind of outlay. Business 2's owner simply stated that she would like one but 'couldn't afford them'.

5.2.6 - Is the picture framing trade innovative?

No.

The 12 respondents all operate their businesses in similar ways, which is the same way that picture framing businesses have operated for many years. Technology has not had a major impact at the bespoke level and, where it could be utilised, is expensive to buy. Supplier 7 thought that one of the problems here was the lack of younger people (digital natives) entering the trade, as new idea generation wasn't happening. This is exemplified through the amount of people that retire into the trade and learn from other digital immigrants, or people getting involved in the family business and simply doing things the way that their parents showed them, as it seemed to work. Investment in new equipment wasn't seen to be required.

Do framers and/or suppliers consider themselves to be cutting edge? Why?

No.

The picture framing trade is a slow-moving trade where technological change happens at a snail's pace. Nine of the businesses interviewed actively sought to maintain the hand-made image that they'd built up by shunning the advancements in areas such as mount cutting – it wasn't just the cost that put them off. These findings were backed up by Supplier 6 who sees resistance to new technology from many framers and a general lack of investment for future needs, providing the example of the way framers will buy used blades for their Morsø which are cheaper, rather than paying for new ones, therefore 'getting a shorter life out of a key piece of equipment'.

There has also been mixed responses to the use of the internet as a source for sales. Businesses 1, 2, 4 and 5 primarily use the internet for a web page that advertises their services and/or social sites for the same purpose. Business 3 does sell sports shirt framing online under a different business name but admits that it isn't really viable – he only keeps it going as his deceased father set it up and he feels a sense of guilt about shutting it down. The other respondents either haven't found a use for the internet or, in the case of Businesses 8 and 12, actively stay away from such technology.

The problem of picture framers making use of online technology was summed up by Supplier 2 (and reiterated by Supplier 3) who said that 'it wasn't easy to set up and run an online bespoke service due to the range of sizes, frame options, glass types, mount colours and framing styles available'. The businesses that have attempted to do this tend to offer a more limited choice in these areas and tend to be contract framers that work with these limited ranges daily.

Do framers take advantage of aspects such as conservation or FSC membership by suppliers in their advertising or sales pitch?

Business 5 reported that they never took advantage of things like FSC membership, nor did he particularly investigate it when deciding on a supplier, as he thought that it would be 'a standard procedure for his suppliers to be members' – something which isn't the case! Business 12 didn't even know what the FSC was, even though Supplier 2 said that they had done a big advertising campaign based around their FSC membership 'a couple of years ago'. However, as Business 12 do not use Supplier 2's product range, this could explain to a point why they weren't aware of the FSC as their current suppliers are not members of it. None of the other framers took advantage of it either, due to not knowing about it or caring about it.

Regarding conservation framing, Business 3 reported that they never get asked for this level of framing from customers, especially as a lot of their customers want something framed that they've 'paid £1.50 for off Etsy' and therefore want it framed as cheap as possible. Business 4's response was the same, with them adding that they can't recall any of the public talking about sustainability when it comes to their framing requirements, although they had found that in the past, contract customers who were supplying the likes of the World Wildlife Fund had requested conservation levels of framing as well as wood from sustainable sources.

Business 8 stated that they've 'probably been asked for conservation framing once in all the years they've been framing', which they thought 'was a pity as they'd spent £1,000 on getting trained in conservation framing techniques'. Business 10 also stated that he never got asked for conservation framing at his present location as it was all 'run of the mill stuff' that he framed for customers. However, in his previous business, which was a large contract framing business, he did carry out conservation framing as he was dealing directly with artists who were often placing their work for sale in high end galleries, thus suggesting where the push for conservation framing is coming from. Business 9 said that they rarely get asked for conservation framing, but they do occasionally get customers in asking for non-reflective glass as that's what they've used before. Business 12 reported that they did get asked for conservation framing on occasion and that they would get conservation glass and board in if customers required it.

Business 3 also raised an interesting point when he said that 'he should recycle glass', but as his local council charge him for a recycling bin, he just puts all his glass and scrap mountboard into the general waste bin rather than paying for two separate bins.

Business 4 stated that they tried to re-use the packaging that their stock arrived in as much as possible. The sheets of paper that come between each sheet of glass were re-used for wrapping pictures, and corrugated board that was wrapped around lengths of moulding was also used for the same purpose. Bubble wrap was also re-used. Basically, they 'never bought in any packaging material' of their own, they always had 'enough from suppliers' that they could re-use.

5.2.7 - Do picture framers in the North East network to aid growth and/or develop skills?

Only Business 5 declared any active attempt at networking. He had attempted to set up and run a local Facebook page dedicated to local businesses as well as joining the local meeting of local business people. However, he quickly found that the people at the meetings were more interested in trying to sell him products and services rather than helping him, whilst the Facebook page became onerous to run due to the demands of people using the site inappropriately. He did feel that the networking that he did amongst other local traders, which consisted of him calling in to see them and to let them know that he had opened in the town, was important as it got him known very quickly in the town.

Business 4 said that although they operated a Facebook page and a website, they never generated much new business. Business 7 did do some networking, by accident, via her involvement in the local parish magazine but it wasn't really an attempt to grow the business in any meaningful way.

Are they active members of FATG or any other online forum? What's their reasoning for this?

Businesses 3, 5 and 6 had all been members of the FATG at some point in the past but weren't any longer due to the perceived lack of value for money. Business 5 explained that he had joined with the belief that, being part of the FATG would be a 'good marketing tool, as he'd be part of a professionally recognised body that provided certain standards to meet'. However, he now felt that the FATG are there to 'line their own pockets' and offered very little in the way of help. None of them could recall a customer coming in because they'd noticed that they were members of the FATG.

Supplier 2 highlighted the problem with the FATG, which is that it is unknown outside of the trade, with Supplier 3 backing this up with his thoughts that the 'public needed to be educated about picture framing', hinting that this is an area where the FATG could do a lot more. Supplier 6 also agreed that the FATG needed to change their advertising strategy as, at the minute, it was ineffective in 'either growing membership or making the public aware of their existence'. Supplier 7 highlighted the problem of falling membership of the FATG but did say that he felt that they were 'trying hard to train people'. However, he questioned who is being trained if membership is falling?

None of the respondents reported being active members of any online forum.

Do they work with other similar/different businesses to develop concepts?

The owner of Business 6 did help the owner of Business 1 when he first took over by providing advice and sending his framer over to Business 1's premises to help organise their systems. Business 1 has also bought stock from Business 6 if he's run out and needs it in a hurry. Business 3's owner said that he was also happy to supply other framers if they'd run out of something that he had excess amounts of.

Business 8 reported that if he needed any specialist mounts cutting such as shaped ones, then he would go to see Business 4. In return, because Business 8 had a cold press to seal work, and Business 4 didn't, Business 4 would bring that work to Business 8.

No other respondents mentioned any cooperation of any kind with other framers.

5.2.8 - What's the future for picture framers in the North East?

Supplier 2 has found that the picture framing businesses that are generating a decent turnover on which to live, tended to be the larger one-stop-shop type businesses that offered bespoke and contract framing, fine art and photographic printing, and possibly other services such as art supplies. They also have an online presence for some of their services. However, he also feels that there is a future for bespoke framers as well, as he's found that his bespoke customers are reporting that top end sales for expensive frames are increasing, as they are not available online.

Business 3's owner is 30 and, in his own words, 'is financially comfortable at the moment' and doesn't see that changing any time soon, so is confident for his future. Business 1 is also confident that he has a future. As one of only two owners interviewed who are under 30 years old, Business 1's OME sees a lot of framers approaching retirement age and so he hopes that, as there becomes fewer framers in the area, more people will seek out his services. Supplier's 2, 5 & 6 all said that they're not seeing many younger people entering the trade, with Suppliers 2 & 7 agreeing with Business 1 in that fewer picture framers may lead to more business for the ones that remain. Suppliers 2, 4, 6 & 7 all confirmed that their customer base in the form of framers is getting older, with Supplier 2 stating that over his 15 years in the trade, he's found that lots of his customers have retired (as have those of Supplier 3), and more will retire as there are few 'below 50ish'. Suppliers 5 & 6 agreed with this age issue, with Supplier 6 stating that the average age of his customers is 55 years old. This double-edged sword of fewer framers leading to less choice but potentially more business for the remaining ones is also being created by the increase in online sellers (Supplier 3) as well as big box stores (Business 4) selling cheaper, potentially imported, ready-made frames and throwaway art.

However, Supplier 3 did feel that, since the Covid 19 pandemic, she's seeing more younger people starting in the trade as well as more women (the latter point was also stated by Supplier 7) which is in stark contrast to Suppliers 2 & 6.

Business 2 feels that if a framer can find a niche market then they can survive, but 'they need to stand out from the crowd', and if that entails online trading, then so be it. This view was also backed up by Businesses 4, 6, 7 and 12, with Businesses 6 and 12 both stating that 'people will always need something bespoke' framed, whilst Business 7 stated that 'there are a lot of sizes of frames that people can't buy online', something also pointed out by Business 2. Business 7 also went on to say that many people want to get existing pictures re-framed to spruce them up, which isn't likely to change. Supplier 3 also agreed that there was a future for picture framers if they could provide something unique, stating that she has seen an increase in traditional skills coming back into play, especially amongst the younger, art-based framers that want to develop a specialism. However, Supplier 7 contradicted this view as he felt that there was very few framers now focusing on specialist work due to the time required to carry these tasks out and the resulting cost implications for their customers, especially if they are working on their own, and preferring instead to focus on 'run of the mill' work that can be turned around quickly and profitably.

This feeling of picture framing services being required in future was also echoed in Supplier 7's thoughts that as a craft business, there will always be somebody interested in operating as a framer, and there will always be somebody that needs something framed. Although Supplier 7 broadly supported the sentiments put forward by the business owners, he also added that to survive, framers will need certain skills, but that these skills can be learned progressively.

Business 7 felt that home framers would be able to stay in business as they have limited overheads and often aren't reliant on it as a sole income, but a pure picture framing business operating out of a premises may struggle as, going off her costs, if she were to open an actual business, she'd have to 'double or triple' her prices which would put a lot of her customers off. She felt that the best way forward was for a framing business to be in a town or city and be incorporated with another line of income such as a gallery. However, as already reported in Chapter 5.3.1, those picture framers operating in a retail environment have found that print sales have collapsed in recent years. Supplier 3 agreed that to survive, a picture framing business needed to add something new, whilst Supplier 7 thought that based on his experience, the number of pure high street framers would continue to fall but that home framers, with their lower overheads, would continue to trade to whatever level they were comfortable with, thereby making an active decision to limit growth.

Business 8 also felt that there was a future for picture framing businesses, but again felt that it would be very difficult to 'raise a family and live off the proceeds of solely operating as a picture framer' – another source of income would be required. This view was also echoed by Business 9 who felt that picture framing was a 'nice retirement business' where another income was in place, or if the framer was also something like an artist, 'then yes, it would work as it is a complementary service'. But not if it was someone young relying on picture framing for a sole income or, as Supplier 7 said, trying to raise a family on.

This 'retirement business' idea was also hinted at by Supplier 7 who stated that as picture framing was a craft business, people could come to it in later life when some of the required skills have been developed, thus backing up the findings in this research as reported in Chapter 5.4.2. Business 5 was very blunt on this issue, stating that 'Yes, there was a need for picture framing in the future, but income wise there was no future for framers'. This need for picture framing was also raised by Supplier 6 as, in his words, 'It's a touchy-feely industry', but didn't feel that it was a growth area, even with the possibilities that the internet provides, as 'there are problems with posting/delivering finished pictures due to the fragility of glass, as well as the inherent problems of measuring bespoke work'.

These views relating to second incomes were reinforced by Supplier 6 who said that in the 1990's, many new entrants were ex-armed forces personnel who were retiring with a healthy pension and wanted a change in lifestyle. However, this situation was no longer occurring, a view backed up by Supplier 5 who said that they had seen an overall reduction in the number of people entering the trade when they retire from their chosen profession.

Supplier 2 said that he'd found that the new starters that he was dealing with tended to fall into one of three categories.

1. Artists/photographers – framing their own work in-house and then offering a bespoke service to other artists/photographers or to the public.
2. People looking for a second income.
3. People seeking a lifestyle change.

The first two categories fall into agreement with Business 9's views, as would category 3 if it's also linked to having a second income from a pension or such like.

Business 10 was a bit unsure as to the future for framing as he is wanting to retire and isn't 'really sure what's going on in the trade anymore'. However, he did say that his sales were 'definitely going down compared to the past', so in his current location no, there wasn't a future. But there was a possibility of a framing business surviving if it was in a more affluent area, as he is often surprised at how much people will spend on framing what he considers 'a worthless piece of art', and how far they are willing to travel to get it done. Supplier 1 was also constantly amazed at how far people were willing to travel to find 'a good framer', whilst the importance of an areas affluence, like Business 10, was raised by Supplier 7, with the type of framing offered reflecting the area it was selling to.

Supplier 6 felt that the only way for a bespoke picture framer to 'make money' was to own their own building outright, therefore reducing their main overhead. This is something that benefits Business 11. However, Supplier 6 also pointed out that this potentially brings in another problematic decision - could they make more money from renting the property out instead of trying to operate their own picture framing business? This feeds in to the thoughts of Supplier 7, who said that he believes that the picture framing trade is going to see some big changes in terms of the number of suppliers and picture framers but isn't sure when this change is going to occur or what the trade might look like in future. The only thing that he was confident about is that the days of the pure high street picture framing business are 'numbered'.

5.3 – Summary of Chapter 5

In summary, the findings recorded in Chapter 5 have shown that growth drivers within micro businesses in the North East appear to be limited by:

- The aims of the OME, not the potential market. The OMEs of the businesses that participated in both the pilot survey and the main research are not driven by profit, rather they are driven by a desire to enjoy what they are doing. The OMEs of the picture framing businesses pride themselves on the quality of service and product provided and are happy to rely on this to provide word-of-mouth sales.
- The cost of rent and rates in prime positions is deterring some picture framing OMEs from growing and/or expanding.
- The recruitment of the correct staff that have the correct skills.
- The age of OMEs when they enter the trade. Younger OMEs tend to have more desire to achieve growth.

The lack in growth desirability has also led to a lack in use of business planning tools, as the OMEs simply don't see the advantage in using them. Rather, they micro plan on a regular basis, adjusting the plans as required, without writing anything down. This lack of formal planning for growth has also led to a lack of a requirement for external financing, instead relying on internal sources of finance to fund any purchases. It has also led to a lack of a requirement for seeking out the help of business support agencies as, if they are performing to the OMEs expected level, there's no need to get any outside agencies involved.

Networking has been utilised very little by any of the OMEs, and those that have tried to network have found it of very little advantage to their businesses. This includes the membership of trade bodies which are seen to be a total waste of money in terms of gaining business.

Beyond the use of PC's, technology has not had a big impact on the OMEs, and even the growth in sales online has had little impact on the micro businesses involved in this research due to the nature of their work. Within the picture framing trade, technology at the bespoke level moves so slowly that it is hindering innovation, as new entrants to the trade can easily purchase used equipment that is several years old, and then learn from others in the trade using similar equipment. Even factors such as conservationism have failed to make any impact at the bespoke level of the picture framing trade due to the lack of interest from customers and/or the framers themselves. It only really exists within the trade at the point of manufacture and for very expensive framing jobs.

Regarding the future of picture framing in the North East, the general consensus is that there is still a need for it, but what demand level that need will be for is still going to decrease over the foreseeable future until a new equilibrium point is achieved.

Chapter 6 – Contribution to academic understanding

Chapter 5 provided the results from the research that was carried out amongst 12 micro business OMEs trading as picture framers. It also provided the results of the pilot survey which was carried out to test and develop the research method prior to the main research, as well as to provide some base data on micro businesses from other industry sectors on which to carry out a comparison of results against picture framing businesses and any prior research by other researchers.

Chapter 6 provides a discussion of the results of the research and where this research has been able to contribute to the research knowledge regarding micro businesses, either in reinforcing prior thinking or developing new thinking on which further research can be carried out in future.

Chapter 6.1 considers the contextual position, discussing the overall effects that are impacting OMEs decisions based on regional or industry wide changes. The chapter considers the effects that the changing face of the region's major retail centres are having on the decisions made by micro-OMEs as well as the impact of a changing business environment within the picture framing trade.

Chapter 6.2 examines the issue of micro businesses lack of formal planning, but highlighting that micro business OMEs do actually plan, but at a micro level as and when it's required.

Chapter 6.3 looks at the growth factors identified in the research verses those of previous studies and identifies the barriers to growth that are being encountered by micro business OMEs in the North East. Areas identified and discussed include the age of the OME; the motivational factors at play; whether education, training or experience has any impact; and the challenges faced when employing people.

Chapter 6.4 looks at whether the OMEs have had any business support and, where they have, how useful it was. This then forms a discussion around the level of support available and how it compares to other studies from elsewhere.

Chapter 6.5 examines the use of external financial sources confirming the findings from other studies in their lack of use.

Chapter 6.6 looks at the results of the findings in terms of innovation, conservation and networking. Innovation wise, the reasons behind why there is so little innovation across the industry is examined as well as to why there is very little process innovation. Saving the planet is a big issue that businesses of all sizes are having to take notice of, and this chapter also examines whether this is an area of business that bespoke picture framers could or are taking advantage of. Finally, with modern technology making communication ever easier, the lack of networking within the trade in the North East is examined.

Chapter 6.7 reviews what the future for micro picture framing businesses may look like based on the responses from the OMEs and suppliers. The general feeling that the trade will continue to shrink pervades the responses although one industry author does feel that the shrinkage is due to stop. Potential future locations are examined along with the range of services that may be available in future.

6.1 – Contextual position

Micro businesses are, in general, facing some major challenges in the coming years. Rent and rates within town centre locations have risen to such an extent that micro business owners are finding it harder and harder to maintain their businesses in these locations, especially if it entails the additional cost of employing staff. Nor do they even consider town centres as a place to expand or move to, thus limiting their growth in this direction. This has helped to lead to the situation in the North East where neither Newcastle, Sunderland nor Middlesbrough, which are three of the main urban areas in the region, have any bespoke picture framing businesses in their main retail centres. This movement out of the major shopping locations is following the general trend within retail in the UK, as online sales (Weltevreden and Atzema, 2006 cited in Millington and Ntounis, 2017) and retail parks (Thomas, Bromley and Tallon, 2004) take customers away from these traditional shopping centres. However, retail parks are aimed at the large well known retail businesses, not micro businesses and online shopping does not fit the nature, very easily, of a bespoke service.

As a result of this combination of factors, this research found that the micro business OMEs identified and approached, now tend to be in less high-profile retail positions, in industrial units or at home, all of which reduces foot traffic past them and potential extra sales through impulse purchases or diversification of the product range. According to Goltz (2023), two of the most important ways framing businesses can make money are staying smart inside the business premises and the kerb appeal from outside. This is because customers are leaving their precious items, some very expensive, with the framer and they don't want to leave them in a poor environment unbefitting their value. But this kerb appeal element in particular is proving harder to achieve for these micro businesses as they move further away from high profile locations and into garages or factory units.

But, paradoxically, micro businesses such as picture framers may actually benefit in another way from this move to less seen positions, as customers picking their finished work up, which can be large, can get their cars parked nearer than they can in a city/town centre, especially during peak time periods.

This move away from visible areas has led to Supplier 6's view that picture framing is now 'out of sight, out of sound' meaning that not seeing any picture framing businesses would lead people to forget that they had something to frame. It's something that the researcher, whose own picture framing business is located in a retail unit in the middle of a housing estate, not in the town centre, has found in his own business. Customers have often said things like 'There's not many of you guys around anymore', or 'We didn't know where to go to get some framing done so haven't bothered'. This 'out of sight, out of sound' problem may well be affecting other micro businesses in the same way – much as Business 9 found with their first location.

This fracturing of a central retail area where micro businesses can feed off the footfall generated by this centralised business area, is having a major impact on the location decisions that are being made by OMEs of micro businesses of all types. Hence, we are seeing the increasing use of small industrial units as sales destination points, cheaper office space being used if the micro business is a destination business and doesn't require shop frontage, or micro-OMEs simply converting their garage or spare room into a workshop.

But the growth of the big box stores and internet sales has also led to some fundamental changes in the markets in which micro businesses operate. Micro business OMEs have seen a reduction in opportunities in some areas, whilst others may have opened up. For picture framers in the North East, they have seen:

- The loss of contract framing to the big box stores that import from the Far East.
- Artists buying frames from the big box stores and art materials online rather than locally.
- Artists using their own websites to promote their work, therefore not requiring the use of a traditional gallery space.
- Artists printing their own work therefore not requiring the services of fine art publishers, therefore reducing the need for these businesses, which cancels out a traditional supplier to framers.
- The loss of photographers to one-stop-shops online for their printing, online gallery and framing requirements.
- No obvious new channels of income opening up other than specialisation in a traditional skill.

These changes in the demand structure have led to the likes of Business 4's owner having to close his previous business, which was built very successfully around the contract framing side of the trade, and re-opening as a bespoke framer on a much smaller scale. However, the owners are happy with this situation as they find it less stressful, providing a better work/life balance. The work/life balance was also highlighted as an important factor by Business 12 as they also own a small farm and need to spend time working there as well. Is this work/life balance something that micro business OMEs across the region are striving to achieve, even if it means physically limiting the growth of the business? More research is required in order to clarify the results and make sure that it is not just a peculiarity of the framing trade, although the pilot survey would suggest it's not.

On top of these structural demand changes, micro businesses in the North East must also contend with an economy that is still lagging behind the rest of the country. Nor does it appear to have benefited much from the Government's levelling up agenda, with just 5% of the total grants being awarded in the UK going to the region (Hornstein, 2023). The North East Evidence Hub reported unemployment levels in the North East have fallen between 2022 and 2023, but the likes of South Tyneside, and particularly South Shields, which is the largest town in South Tyneside, have bucked this trend and is still an unemployment blackspot showing an unemployment rate of 13.8% in March 2023 (*Unemployment Rate*, 2023).

According to a North East Evidence Hub Report (no date), since 2015, there has been an overall increase in the number of micro businesses in the North East by just over 10%, but this is tempered by a separate report for them (Athey, 2023) which states that business deaths in the North East stood at 8%, 2% above the national average. Athey went on to state that '1 in 5 businesses in the North East now report that their main concern is falling demand for goods and services'. The researchers own findings, showing a fall of some 30% in the amount of picture framing business in the region since 1997, confirm these challenges.

All suppliers to the picture framing trade that were interviewed also agreed that this negative trend is likely to continue, with Supplier 6 stating, 'My big problem is that there's not enough of you guys *(meaning picture frame OMEs)* are opening up to replace the ones that are closing!'. In all probability this will also lead to fewer suppliers as well, a point driven home by two major closures. The first was in June 2023 when Cassese, who was one of the major equipment manufacturers and the inventor of the v-wedge nails universally used in framing today, had their financial support from the French Government (which had been in place for several years, unbeknown to many in the trade) withdrawn, forcing them to shut down permanently and which has caused a parts and supply issue around the world. Secondly, In July 2024, Ashworth & Thompson Ltd also announced their closure by the end of the year, thus ending the existence of the oldest remaining supplier of framing materials in the UK.

These problems in the picture framing trade may be echoed in other industries in the region, but more research is required if an overall picture of the state of micro businesses in the North East is to be built up – the study of one trade is not enough to draw a definitive conclusion but is a beginning.

6.2 – How do micro business OMEs in the North East of England plan for business development?

Just as Fatoki (2016) found in his research, this research has found that micro businesses in the North East do not formally plan unless they must. Rather, they plan 'on the hoof' which allows them to adapt to the daily challenges that they face – just as Dabic *et al* (2020) found. Additionally, as the owners tend to be working or making decisions on their own, they don't have to communicate their thinking in written form with anyone else, thereby negating the necessity of making formal plans.

To an extent, this lack of formal planning backs up the idea that formal business plans put forward by lenders, support agencies and educational institutions are of no use to micro businesses (Katz, 2018) in the North East, but that a new way of thinking is required that would adopt different styles of business planning for different situations. However, this still doesn't solve the issue of micro businesses focusing on daily survival, not future investment, thereby side stepping one of the major reasons behind business planning – why plan for next year when you don't know if you'll survive next month?

Perhaps the onus is on the organisations asking for formal planning to change their views on formal business planning requirements, instead thinking more about supporting micro businesses in their drive for survival and constructing new ways to help them to invest in the future, possibly through easier ways to borrow money to purchase expensive equipment that would help to bring the micro business into the 21st Century and become more productive.

6.3 - To what extent are micro business OMEs in the North East of England growth orientated?

Growth drivers do exist within micro businesses in the North East but, certainly within the framing trade, they are linked to the age of the OME. More research is needed into the links between the age of OMEs and the growth drivers within the micro businesses that they operate as. Within the picture framing trade it is a long-term problem that was demonstrated in the research, as only two of the respondents were below 30. Is this being repeated across other micro businesses in the region due to redundancy payouts or early retirement leading to entrepreneurs looking to set up a business that will provide a better work/life balance?

From this research, it would appear that due to the lack of OMEs below 50 years of age, most of the micro businesses are growth averse, leading to a long-term decline in the picture framing trade in terms of numbers. These findings are the opposite of those found by Clark & Douglas (2014) in New Zealand who found that HBBs were increasingly focused on online sales, something that bespoke businesses in this research found difficult to achieve due to the touchy-feely nature of the trade.

Supplier 3 did feel that she was seeing more younger people entering the trade, especially from art backgrounds where they are often keen to try more traditional methods of frame and mount decoration, but she did still agree with the other suppliers that there are more framing businesses closing than opening, and that many new starters were still in the 50+ age group. Additionally, as has already been identified by Oxford Economics (2020), migration of the workforce out of the North East is likely to continue, and this migration is probably going to be mostly younger adults seeking better opportunities. They may return to the region later in life, but this whole process exacerbates the age problem amongst entrepreneurs running micro businesses.

Expansion plans

Douglas (2013) and Morrison *et al* (2003) asserted that the growth of a start-up business is determined by the initial start-up intention, which appears to be the case with picture framing businesses, with 50% of them declaring no interest in growing from where they are/were, and 100% in the pilot survey. This could be due to not feeling that they have enough work to grow into a larger premises as proposed by Hogarth-Scott et al (1996) and is a fear of OME 4 in the pilot survey, or that they have satiated their motivational factors (Davidson, 1991) as is the case for Businesses 7, 8 & 12 in the main research. This all confirms the findings of Greenbank (2001) and Casser (2007) in that many businesses remain small due to the OMEs desire to remain small - they want to escape the shackles of corporate life, not create a corporate entity of their own. They are more focused on areas such as revenue growth or work/life balance than employment growth.

Business 5's OME in the main research had been interested in opening a second branch with his life partner running it thereby avoiding the problems of employing staff. However, a life changing event for his partner led to the closure of his workshop and a relocation to his home where he could work around the demands of home life, thereby affirming the findings of Gray (2002) and Matlay (2004). This choice of a lifestyle or home life demands over business growth was also demonstrated by the two home framers that took part in the research.

The fact that nine out of the 12 OMEs in the main research were over 50 years of age, and three of these nine were actually above retirement age, demonstrates one of the fundamental problems within the picture framing trade – that of an ageing population amongst the OMEs whom have no desire to grow. This need to have an extra income, or simply keep busy, fits into the research findings on 'grey' entrepreneurs as carried out by Mattare, Monahan & Shah (2010) in the US.

Motivation for setting up and continuing

The findings in this research that entrepreneurs were setting up their businesses in the North East due to push factors was somewhat at loggerheads with research carried out in both Turkey and the USA (Friedman, 2012) as according to this research, the main motivation for entrepreneurs in the USA was opportunity (a pull factor) whilst in Turkey it was necessity (a push factor). So, although the findings appear to back up those results found in Turkey, Turkey is not a developed economy like the UK, which one would assume would be more like those found in the USA – thus demonstrating the problem of comparing results from different countries or stages of economic development. In fact, none of the respondents in this research stated opportunity as one of their motivational factors. However, the results do fit in with Nowicki and Dziadkoweiec (2015) statement that 'Young entrepreneurs have different needs and, by means of that, different motivation for running a certain business'. Two of the five entrepreneurs in the pilot survey were young when they set their current businesses up, whereas the other entrepreneurs were older, therefore they had a different outlook on the future.

De Silva (2010) found very little prior research into push/pull motivational factors both during the start-up phase and that required to keep trading. This research amongst Bradford's entrepreneurs revealed an interesting change between the dominant start-up factors which were primarily push motives such as being bored in their job or needing to earn a decent living and were backed up in this research; to mainly pull factors such as the need for achievement becoming dominant during the growth phase, which wasn't found during this research.

As 83.3% of the respondents in the Bradford research had been employed directly before setting up their own business, it may explain the dominance of work-related push factors helping to make peoples decisions. However, in the pilot research, it would suggest that 60% of the respondents were not in paid employment before setting their businesses up as they were actively looking for a way to earn a living, whilst in the main research this figure fell to 41% which is more in line with De Silva's research suggesting that push factors are prevalent within the picture framing trade.

Akinboye, Collins and Morrish's (2020) assertion that the stage that a business is in will often determine the amount and type of motivation that an entrepreneur has, was definitely demonstrated, with the two youngest OMEs keen on growing their business whilst the older OMEs were not, also backing up Squicciarini's (2017) assertion that older micro businesses don't grow.

The changing motivational factors through the life of a business were also on show in this thesis' findings, with the enjoyment element confirming the findings of Reijonen & Kompulla (2007) who state that micro business OMEs simply want to earn a living and enjoy themselves while doing it – it's a lifestyle choice. This enjoyment factor is also linked to the production of a quality product and service which, as Kotsios (2023) states, 'reliability, integrity and work ethics are required for the long-term survival of a business', all which were highlighted as either motivational or success factors by the respondents in this research. Two of the OMEs also stated that although their primary motivation when setting up was being your own boss, it had changed to one of enjoyment over time thereby proving the ideas of Morrison (2003).

Venckuviene (2014) developed a very useful response grid for use in his/her research covering a number of motivational factors which drove entrepreneurs decisions. The pilot research built upon these factors and highlighted the importance of interest and of fitting around family needs.

Education, training and experience – is there a link to growth aspirations?

The level of education that the OMEs have was found to be irrelevant in this research thereby proving the findings of Coad *et al* (2013) in that the level of education has very little to do with creating start-up growth.

The findings in this research do, however, contrast with the likes of Makhele & Barnard (2020) who stated that education provided better business acumen, whilst Johnson *et al*

(1999) said that it allowed quicker decisions to be made. But the researcher did not find this in his research on this occasion – either in the pilot or main research, with the respondents varying in education level from very few formal qualifications, if any, right up to degree level.

These findings do raise a question as to whether the education elements that were found in previous research regarding better business acumen and quicker decision making, were more prevalent amongst high-tech micro businesses? Given that all of the entrepreneurs in this research were involved in low-tech micro businesses, and that all 12 of the picture framing OMEs had come from other forms of employment before setting up their business, is it a case of low-tech businesses such as picture framing needing skills rather than education? With only two OMEs attaining formal training through the FATG, another using YouTube, and a further three OMEs stating their desire to work with their hands and learn new skills as they go along, it would seem to support this thinking.

To a degree, this thinking fits in with Eklund's (2020) statement that it's an adaptable workforce that's required to succeed, except that the workforce in this instance is invariably the OMEs of the framing businesses. Eklund (2020) also linked this adaptability to higher levels of education amongst the workforce, but this research has already established that the education level of the entrepreneurs was irrelevant to success within the picture framing trade therefore only partially agreeing with the prior research. More research into this delineation between the educational demands of high-tech and low-tech micro business requirements is required in future.

More apprenticeship programmes such as that operated in Australia ('APPRENTICESHIPS - Picture Framers Guild of Australia', 2020) may help to encourage younger people into trades such as the picture framing trade, and may have the added bonus of raising innovation levels as they strive to make a career for themselves, but this would be a national initiative, not a regional one, and may not solve the migration problem. After all, growth is still dependent on the 'opportunity environment' (Morrison *et al*, 2003) and the researcher is unsure how successful the apprenticeship programme has been in Australia. Further research would be required.

According to the research of Marconatto *et al* (2021), there is a strong link between the experience of a business's OME and the growth of SMEs, a view that is backed up by a number of other authors including Rosa & Scott (1999), Barringer *et al* (2005), Watson *et al* (1998), Lofstorm (2014) and Ekinci *et al* (2020), with Lafuente *et al* (2019) going as far as to say that it was essential to have job experience. And so it has been proven in this research with 6 of the 12 respondents in the main research having direct experience of the picture framing trade before setting up their current business, and a further four having relevant transferrable skills from previous employment. This was also the case in the pilot study with all five respondents having prior experience or transferrable skills.

Many OMEs come to the framing trade later in life which fits in with the idea behind using redundancy money to open a picture framing business – essentially making a lifestyle choice which many micro-OMEs have been identified as making. This results in very little in the way of growth drivers being employed beyond those that satiate their immediate requirements (Davidson, 1991). These OMEs also often have an additional income. More research is needed in order to ascertain whether this is the case in other micro businesses.

Younger business owners tend to have families to support and homes to run, therefore requiring sufficient income from the business to support these expenses, whereas older people generally do not have these overheads to such a degree. And herein lies another problem for the framing trade in the North East as, if they want to operate as a picture framing business primarily, eight of the business owners that took part felt that it would be difficult to earn enough money to provide a living – they would have to offer something else alongside the framing or specialise in an area that no one else worked in. To put this into a financial context, the authors own business made a net profit of just under £10,000 in its last financial year, based on a turnover of approximately £40,000, a figure that 10 of the respondents said that they were also under. In comparison, as of April 2024, the UK minimum wage increased to £11.44 per hour for people over 21 years of age (*Minimum wage to increase to £11.44 per hour from April 2024*, 2023) and so, if a person works a 40 hour week for 52 weeks a year, that equals £23,985.20 per year, which is more than double of what an OME is likely to earn with a turnover of £40k, therefore reinforcing the view that many micro OMEs operate their businesses for the life style, not income. These figures also back up the point that Business 10's owner made when he said that he was glad that he only worked part-time in the business and that he had other ventures to fall back on financially, as he didn't think that he could have maintained his current standard of living from the framing business on its own. Interestingly, he does have a family that consists of two teenage children, and so can relate to income versus lifestyle argument, whereas the older OMEs in the research didn't face this problem.

Employing people

Only one of the respondents in the pilot survey and two in the main research had any employees, thus backing up one of the findings of Clark & Douglas (2010). The other entrepreneurs demonstrated the findings of Fielden *et al* (2000), Poutziouris (2003), Wiklund *et al* (2003) and Walker & Brown (2004) who all reported that entrepreneurs were happy working on their own and that the fear of the complexity of employing people deterred them from creating employment growth. Even those entrepreneurs that had employed people in the past said that they wouldn't do it again due to the complexity involved, plus the fear of having enough work in the imminent future for all employees, thus proving the ideas of Davidson (1989) and Greenbank (2001). OME 4 in the pilot survey and Business 4 in the main research both had experience of employing staff in a previous business but weren't interested in employing anyone again due to the paperwork costs, just as Fielden *et al* (2000) had found.

Only two of the OMEs in the main research expressed an interest in expansion in terms of another branch, but Business 1's OME stated that the problems of finding the correct people to employ who had the correct mix of skills was one of the reasons that he hadn't grown yet. This backed up the findings of Fielden *et al* (2000) by showing that reluctance to find and employ the correct people. Fielden *et al's* findings were further backed up by Business 2's OME who had had some very bad experiences when employing staff.

The research would appear to show that there are more barriers to growth for micro businesses than growth drivers, with the major issue of high cost of rent and rates in prominent positions, alongside the changing face and usage of town centres, combining to deter micro-OMEs from expanding either in terms of size of property, or to take on additional branches, if they could find one in the correct location. Added to this is the issue of skilled staff, as taking on additional branches does require that any staff employed have a certain skill set, as highlighted by Business 3's owner, and this skill set can be hard to come by at an affordable price and with suitable work ethics, as found by Business 6 when he tried to expand several years ago. As Supplier 6 said, a 'typical husband and wife team may be able to expand to two shops without having major staffing issues, but what happens beyond that? How will absence be dealt with?'. You can't expect an employee to work through their lunch breaks or not take any holidays as many micro business OMEs often do. And then there is the question of whether it's all worth it financially?

However, this fall in the number of businesses may actually provide a benefit for those that survive, as highlighted by Businesses 1 & 2. They both believe that, although fewer businesses (framers) will be in existence, customers will simply travel further to find what they want, therefore providing more work for them. This sentiment was also expressed by the suppliers and has been experienced by the author, who now frames for customers who seek his services from across the UK and as far afield as Germany and Malaysia – it's a case of finding the new equilibrium point. Whether this will lead to growth in terms of additional branches or employees in future is unknown at this time although history would suggest not amongst the low-tech micro businesses as, for example, few picture framing businesses have never expanded to multiple branches in the North East. As was highlighted in a recent report from the North East Inovation Observatory for the North East Local Enterprise Parnership which was carried out by Durham University Business School, 'the North East is good to start a business in, but not good to grow them in' (Fernandes *et al*, 2023) and therefore reinforcing the findings of Criscuolo, Gal and Menon (2017).

6.4 - Do micro business OMEs in the North East of England access and benefit from business support agencies?

As proven in this research, business support is available in the North East, especially in the built-up urban areas of the region. However, there is a question mark hanging over the amount of support available in rural areas, with two of the OMEs in this research reporting problems getting any in their location. Both respondents, one each from the pilot and main research, lived in the same general area – one reporting that they couldn't find any local support agencies whilst the other wasn't sure if there was any in the area. This latter OME was also the only one that had gained any advice when setting up as she set the business up in a different county before moving to her current location. These findings back up that of Fielden *et al* (2000) who found a general lack of advice for micro businesses in their research. Another feature of these two respondents locations was that they are both in what's considered to be middle class areas, which raises the point of whether there is a lack of support due to a perceived lack of a need for support within such areas due to the backgrounds (education etc) of the people living there. More research would be needed into this area.

Only one business in the research said that they had used a business support agency when she first opened her business in the north of County Durham, and she said that she found it 'useful in that it helped her to understand the required paperwork involved in running her own business'. However, she never used any other support agencies after that as she didn't feel the need to, nor did she use what she had learned. This poor take-up of support agencies backs up the findings of Matlay (2004).

None of the other OMEs in either the pilot or main research reported carrying out any form of formal business planning beyond possibly a basic business plan when opening a bank account, therefore negating the need for external support or training in this area. This backs up the findings of Greenbank (2000a), Faherty and Stephens (2016), Bellamy *et al* (2019) and Forth and Bryson (2019).

Two of the business owners stated that they have had grants in the past from their local council to buy equipment but had never used a support agency for any other purpose. None of the other businesses had ever used a support agency as they had never felt the need to. These findings back up the research from the likes of Fielden *et al* (2000) and Matlay (2004). Business 4 was a member of a local business group and sought advice from them when his previous business ran into trouble (just as Mole (2000) reported SMEs doing) – however, that advice was to close and start again, which he didn't find very useful, but ultimately followed.

However, the researcher does wonder if this supposed lack of help from support agencies is through poor awareness of where to find these support agencies, as highlighted by one respondent in the pilot survey. This runs alongside OMEs being unsure of what these agencies can offer micro businesses, especially after the initial setup period. Pickernell *et al* (2013) reported the same issue and suggested that a new approach towards the way funding is provided, which is based on age, is needed. More research would be needed to establish whether entrepreneurs were aware of support upon setting up their business in the North East and whether a new approach to funding based around age is required, especially in areas of high unemployment or low wages, where people may not have had a chance to save money up.

A common theme that came to light in Chapter 2's literature review amongst researchers examining the amount of support for OMEs of micro businesses, was that of a lack of targeted support, with business support and guidance seemingly having a one-size-fits-all approach. But the problem that this researcher sees is how does central and local government provide such targeted support to micro businesses in such varied industries as seen across the UK, and of such varied sizes? The needs of an artisanal business such as a picture framer working on their own are vastly different to those of a regional double glazed unit manufacturer with 150 employees. Does the speech by Spock in The Wrath Of Khan explain this approach best I wonder, in that it's viewed that 'The needs of the many outweigh the needs of the few' (Mintz, 2015)? However, as most businesses set up are micro businesses, this would seem to be the wrong way around as there are many more micro businesses than there are small or medium sized businesses!

Help and advice is also often available via suppliers and/or trade organisations, with the FATG providing such a service within the picture framing trade. However, four of the suppliers in this research expressed concern that the FATG were essentially preaching to the converted, as they do not carry out any advertising to the public or non-members and therefore do not raise awareness of the trade. This leads picture frame OMEs to question the value of their membership, as inclusion of their membership of the trade guild in their own advertising means nothing to the public and therefore doesn't bring any extra custom through the door. This feeling of membership of the FATG being a waste of money and time was echoed in the pilot research where none of the respondents were members of any trade organisations either, which would suggest that this is the case for micro businesses across a raft of trades. This does raise the issue of whether some of these trade organisations need to adapt to modern concerns and try to change their approach to the general public – something akin to ABTA in the travel industry perhaps?

6.5 - Are North East micro business OMEs accessing external funding sources to help with business development?

None of the businesses interviewed had problems financing the start-up of their businesses as they all used their own or family funds to buy what was needed. Business 2 has used a bank loan in the past to purchase equipment, and Business 6's owner had investigated leasing a new CMC but couldn't find a supplier willing to offer this. Most of the respondents were loathed to use a bank loan for such a purpose, wanting to pay cash in order that a debt that they may not be able to pay isn't run up. This lack of interest in long term financing options when wanting to buy capital equipment amongst picture framers backs up the findings of Martínez-Sola, García-Teruel and Martínez-Solano (2018) in that these types of OMEs seem to prefer to have a target amount of cash in the business before they will invest. It's an endemic problem with European based micro businesses in that they want to use internal sources of finance above all other sources (Masiak *et al,* 2019).

Within this research, it may be that this lack of willingness to invest in new equipment is linked to the age of the OMEs when they enter the trade and therefore their lack of a plan to be in business in the long-term – they are keeping busy until retirement. More research on this aspect would be needed, and whether it's an issue in other micro industries across the region.

6.6 - How do North East micro business OMEs innovate their operations?

The picture framing trade at the bespoke level is not innovative, nor is it cutting edge - just as many other micro businesses such as cleaners or vermin catchers aren't. These types of business are using the same techniques in their day-to-day work that have been used for decades, essentially using the same type of equipment. Few of these OMEs work together to try and create new ways or new thinking and, although some micro businesses such as picture framers have access to training schools, the training schools train people using the same types of equipment that has been in use for decades. The quality of this equipment may have improved through better engineering, but their design and use is basically the same.

More 'modern' developments do allow OMEs and their staff to be more creative with their designs, especially if they incorporate the use of IT such as the CMCs in picture framing. However, if the demand for the more varied products that this type of equipment can make isn't there, why should micro business owners pay sums in excess of £20,000 for something that will produce, in general, the same type of product that a hand operated one will do for under £2,000? They simply can't afford it! This was a view shared by 6 of the 12 respondents in the research. More modern technology does allow micro businesses to speed up the production of products, for example, when picture framers cut multiple aperture mounts or several the same size, and may even help on health grounds such as relieving the pain from tendonitis in the wrists, but OMEs still need to weigh up the costs of such an investment when they may only trade for 10 years or less. This backs up the ideas of Willets, Atkins & Stanier (2020) when they ask whether it's even worth micro businesses trying to find a way around these barriers. This problem may cause a major hurdle for support agencies in the North East who are trying to help grow small, non-technology based, artisanal style businesses. Major funding or hard evidence would be needed to persuade these OMEs that the investment is worth it.

Huggins (2011) argues throughout his findings that Knowledge Intensive Business Services (KIBS) had been increasingly outsourced by companies prior to the 2008 economic crash, and this helped to drive innovative businesses to grow quickly through international expansion via business networks. If this is true, then it follows that KIBS businesses would have focused on fast growing industries, especially those that were focused in one area and could feed off one another's knowledge development. This would be to the detriment of slower growing industries and trades such as the picture framing trade which, although manufacturers of moulding and equipment etcetera can take advantage of globalisation, the actual bespoke picture framers across the UK who deal primarily with local communities and are not innovative in terms of new technology, cannot take advantage of globalisation, and therefore remain small businesses. If the trade is slow growing, why invest in it? Isn't it better to just wait for innovation effects from other more profitable trades and industries to trickle down? After all, this is the case for CMCs which were developed from plotter technology. However, this is assuming that technological change happens in an area that can trickle down to the micro business level.

This lack of use of cutting-edge technology to drive innovativeness is likely to continue within these low-tech artisanal businesses as, in the case of picture framing at least, the equipment developed to this point is so efficient at doing the job that it was designed to do, why change it? Some micro-OMEs, Business 5 for example, positively worked against using modern technology as he saw himself as more of a traditionalist, wanting to demonstrate to his customers that he was a craftsman, an artisan, as he believed that this would be a good way to promote his business.

Growth is more when innovative (Marconatto *et al*, 2021) and, as Fernandes *et al* (2023) highlighted, some business sectors in the North East are under threat from economic change due to a lack of innovation, and the picture framing trade may well be a perfect example of this, further helping to reduce their numbers and confirm the trend predictions within the trade from suppliers.

Could micro businesses benefit from conservationism?

Many micro businesses work with wood or paper-based products, and the industries that they work within have had to change over the last 30-40 years in terms of the types of wood that is used in the manufacturing process and waste reduction. Sustainablility is now the key element when thinking about what wood to use, and projects such as the FSC and PEFC have helped suppliers to source wood from sustainable sources. The use of finger joints in the production of lengths of moulding has also helped to reduce waste, as standard lengths can now be supplied rather than the length being determined by the size of the tree. However, the complexity involved in the storage of such goods has meant that many suppliers, and all the respondents in this research, had failed to either apply for membership, or use their suppliers membership in their own businesses advertising.

The use of plastic to make picture moulding has increased in the last 30 years and, even though the Polcore range uses 90% recycled plastic in its production, there is still a degree of snobbery regarding the use of wood mouldings. Many people still prefer products made from traditional raw materials such as wood and see plastic as a cheap option that's been imported and lacks quality (not always the case but is a hard perception to break), therefore opening the door for bespoke framers to offer traditional wood frames as an alternative to this quality seeking market. Is this something that other micro businesses are finding? Is it a niche that could be taken advantage of? Further research here is also required.

These are moves in the right direction as far as conservationism is concerned, as is the effort by some suppliers to reduce the miles travelled by stock by sourcing more products in Europe as opposed to Asia. It also demonstrates the willingness of manufacturers to do their part in helping the planet. With a stuttering move towards environmental production of goods all around the world, industry sectors of all types are seeing environmental changes occurring in the production phase. For example, there has been a big push from the FATG to standardise levels of conservation framing across Europe, with manufacturers and wholesalers having a heavy input into the new requirements for mount board. This involves a commitment to investment from suppliers to improve the way that mount board is made so that the damage from natural acids to artwork is minimised as well as the reduced impact on the environment.

But the message isn't getting through to the end user, therefore isn't being asked for over the counter of picture framers in the North East. End users do show interest in conservation framing if the picture framer brings the topic up (which is another issue to do with up-selling), but otherwise, framers are not bothered because their customers aren't bothered. So although there is lots of changes going on behind the scenes, the public, and some framers, are unaware of them or simply don't care that they are available.

This lack of awareness by micro-OMEs and the public can fall onto the shoulders, according to Supplier 6, of trade organisations such as the FATG, as it's only their members that are updated about these changes. This is a problem demonstrated in the research findings of this thesis, as none of the respondents were members of the FATG, so how are they supposed to find out about these improved conservation standards? Of 85 framers in the North East in 2020, there were only four members of the FATG, and one of them (Business 5) has given up his membership since the initial research was carried out, whilst another is not a framer, but a manufacturer of tape, which leaves just two members in the whole of the North East who will be informed of these changes! Is this happening across all industry sectors?

However, is the promotion of products by micro-OMEs that promote conservationism a missed opportunity? Is it also the responsibility of the OMEs themselves to educate their customers on the benefits of these products, and therefore provide an opportunity for up-selling, and therefore a higher profit margin? It's a point that was raised by Supplier 6 as he feels that not enough picture framing OMEs up-sell in areas such as UV glass. Given that many micro-OMEs have a personal connection to their customers, perhaps they are missing this opportunity for fear of scaring scarce customers away with a product that may be perceived as more expensive by their customers – a point of concern raised by OME 11.

Do micro businesses in the North East network so as to aid growth and/or develop skills?

The total lack of interest in any formal type of networking by the OMEs in both the pilot and main research backs up the findings of both Baines & Wheelock (1998) and Chell & Baines (2000), including the link between not using formal networking and being growth averse. Modern technology has changed dramatically since these reports were made though, which has allowed areas such as social media to grow stratospherically – for example, the growth of online forums now allow OMEs to follow what's happening in their trade, even though they may not take an active part. However, not everyone is tech friendly, with only 50% of the picture framing OMEs having a website, Facebook page etcetera to try and spread the word, and only 25% of the OMEs in the main research reporting using social media in any way to promote their business. These findings prove that although technology has changed, the findings of Baines & Wheelock (1998) and Chell & Baines (2000) still hold true.

This lack of networking use may also be to do with the form of businesses that were interviewed, as they were all low-tech businesses, not fast-growing innovative ones; networking has been found to be crucial for innovative businesses by the likes of Roper (1997) and Roper & Hewitt-Dundas (2017). More research into this division between high and low-tech MSMEs is required.

Another common trait amongst the micro businesses involved in this research is their total lack of advertising anywhere. Rather, all the respondents felt that word-of-mouth communication to spread the word about their business was of optimum importance, therefore also backing up the findings of Hogarth-Scott *et al* (1996) and Greenbank (2000a). It's an 'opportunity environment' (Morrison *et al*, 2003) that picture framers and some other micro businesses, operate in. All the OMEs backed up the findings of Outsios and Farooqi (2017) in that none of them really considered family and friends as major forms of networking, even though OMEs 1, 2, 3 and 5 in the pilot survey all stated that they had made use of them to build their business in some way.

E-commerce has actually proved problematic to incorporate for many picture framing businesses due to the bespoke nature of the work. Those sites that do offer bespoke framing online only offer a limited range of framing options, something that tends to lend itself more to the larger contract framing businesses. This view of bespoke picture framers not making wide use of e-commerce backs up the suggestion of Reuschke & Mason (2020) that in some circumstances, e-commerce has been hyped up, especially in rural areas.

Evidence of process innovation (Hervas-Oliver *et al*, 2021) amongst the entrepreneurs has come to light, with Business 4 in the pilot survey introducing new ideas and techniques to his customers via knowledge gained from developments in the trade. However, within the picture framing trade there is little evidence of process innovation.

However, there was some evidence of cooperation between framers with OME 8 stating that he had used OME 4 for multiple aperture mounts as they had a CMC, with OME 4 reciprocating this shared use of equipment when needing something dry mounted, as OME 8 had a dry mounting press. OME 6 had also helped OME 1 to get set up by sending his member of staff to the latter's premises in order that he could show the new business owner how to do basic framing and operate recording systems.

Technology in the picture framing trade has not developed very quickly at the bespoke level. Some drip down effects have been seen in areas such as mount cutting with CMCs being developed in the early 1990's from plotter technology, and POS systems in the last 20 years – but the likes of the CMCs are still prohibitively expensive, even in the used market. With many picture framing OMEs being over 55 years of age and not looking to grow their business, it begs the question of whether the investment is worth it (Willets, Atkins & Stanier, 2020)?

Communication between the suppliers and OMEs has been vastly improved by the use of the Internet in that product updates can easily be notified and seen. However, several of the OMEs in this research opined the loss of manufacturers displaying their goods at the Spring Fair at the Birmingham NEC each year, missing the opportunity to network with them to find out what new products and ideas were coming along, as well as the ability to see displays of new techniques or products. The internet appears to have replaced this as a way of sharing these changes, but the networking element has been lost. The FATG have tried to get a trade show up and running again with events in 2023 and 2024, but their communication of said events has been poor as again, the only framers that are aware of them are those that are members of the guild. Is this endemic for all micro businesses? Further research will be needed to confirm if this is the case.

6.7 – How are micro businesses in the North East of England positioned to meet future challenges?

Micro business OMEs have been, and still are, facing major structural changes in their markets and low-tech micro businesses appear to be especially susceptible to these changes. However, the OMEs and suppliers both believe that there is a future for their services and major figures in the likes of the picture framing trade such as Goltz (2023) believe that the decline has 'bottomed out'. However, there are going to be caveats as, in the words of Supplier 5 when asked this question, 'In terms of need - yes. In terms of income – no'. It may well be that the view of Goltz is flawed, in that he operates in the North American market (where a similar decline in numbers has been seen), not the UK market, and certainly not in the North East market which, as Supplier 5 mentioned, is a very different market to that in the South of the UK. More research will need to be carried out in future to see how micro businesses have dealt with these changes in the North East. Research into other regions of the UK would also be required to compare what's happening in different regions and therefore gain an overall picture of UK micro businesses, and whether the North East is really that different to the rest of the country. However, a word of advice regarding the gathering of such information is given here based on experience gained during the research for this thesis – postal/emailed approaches are not effective in gaining interest from micro-OMEs. The personal approach via phone, where the research task can be explained, is far more effective. Even then, as suggested by Pielsticker and Hiebl (2020), the response rate will be lower in micro businesses than in larger organisations due to the work load on the MSME OMEs.

The location of micro businesses and the services that they offer are likely to be very different from the past due to the changes in UK high streets and their surrounding areas. The traditional look of micro businesses such as framing workshops found on the local high street will change. As Supplier 7 said, the framing trade is going to change quite dramatically in the not-too-distant future, with fewer framers being supplied by fewer suppliers. This may mean that the chances of these businesses being able to grow will be limited as, being an expensive, personalised type of business, they are only likely to survive in certain locations where people can drive to them easily. Conversely, there may be opportunities for growth amongst those successful picture framing businesses that are able to adapt quickly to the changing shape of the trade. These changes are not likely to be limited to the picture framing trade though further research will help to confirm whether this is true.

With the continuing demise of city centre retail areas, it's unlikely that many micro businesses will find their way back to the high street, and even in market towns it may be difficult to survive. Evidence of this was provided by a report in Property Week which highlighted the problems faced in middle-class towns such as Hexham in Northumberland of making and maintaining an attractive shopping hub (Branson, 2024). It may well be that micro businesses offering bespoke services will be found generally either in cheaper factory units, perhaps sharing a space, or simply operating from out of their garage at home. Some secondary retail positions may also be used if enough trade can be garnered. This is a trend that has been going on for several years already and is likely to continue for the foreseeable future. However, perhaps it offers the opportunity for local governments to re-visit their focus on town centre planning which has seen the closure of big brand stores across the region (and country), leaving large empty stores. Is this the time to try to encourage entrepreneurs back into the centre of towns and become hubs where micro businesses can draw in customers with unique goods and services all under one roof? It's an idea that Stockton town council are looking at.

Micro businesses that want to grow are left with a difficult choice, as its becoming obvious that earning a living from a single type of work is increasingly difficult. For example, picture framing businesses find that sales from artwork is no longer a good income stream, and the income from framing work from artists and photographers is vastly diminished. MSME businesses that offer a one-stop-shop for artists and photographers with high quality scanning and printing facilities may be a good example of diversification, as Supplier 6 feels that these types of business are the ones currently 'doing well', but this involves more financial outlay for equipment and staffing than some OMEs may not have or wish to make. Other micro business OMEs are facing similar problems in that if they require passing footfall, where should they position their business due to the falling numbers in town and city centres? If they are a destination business like picture framing, is there enough trade to make it viable on its own and if not, what else can they offer alongside it? However, this is all dependent on the drivers behind the business – is it for income or life style. If it's for income, then how to overcome the issue that micro business OMEs in Europe do not tend to invest for the future of their business in terms of borrowing for expansion or new equipment?

The Covid 19 pandemic did help to promote the 'buy local' campaigns (North Tyneside Council, 2020) that sprang up across the UK, with examples of local butchers, bakers, greengrocers and other suppliers of essential items all stepping up to supply goods to their locality and offering local deliveries. Many entrepreneurs also took the opportunity to set up pop up businesses from their own homes during the lockdown periods, supplying products such as home-produced food stuffs or adapting existing machinery and equipment to make hand sanitiser or face shields. Is this something that micro business OMEs will have to look at in future – the adaptation of equipment for different purposes? And is it possible to adapt them?

The growth of micro businesses such as picture framers is still likely to be linked to the intentions of the OMEs and the barriers that they face. If they require a liveable income and can earn more stacking shelves in a supermarket, why bother with the stress of running a business of your own? It's all dependent on the objectives of the entrepreneur – do they want to grow the business or is it all about lifestyle? Employing people adds costs to a business and can be a daunting challenge for an OME who's never done it before and better support and guidance from business agencies is needed if these fears are to be overcome. A new approach is also needed from the government in terms of any extra costs on top of the wage paid to any employees such as National Insurance contributions. This may persuade some micro-OMEs not to stay small just as Greenbank (2001) found in his research.

Chapter 7 – Recommendations

Chapter 6 consisted of a full analysis of the research results in which links were made to prior research where possible, highlighting where the results either agreed with prior research or not. The chapter also discussed any new findings that had come to light.

Chapter 7 provides recommendations based on the analysis of the research results under five broad headings – planning, growth, business support, funding and innovation. These five categories formed the basis of the research aims which were;

1. How do micro business OMEs in the North East of England plan for business development?
2. To what extent are micro business OMEs in the North East of England growth orientated?
3. Do micro business OMEs in the North East of England access and benefit from business support agencies?
4. Are North East micro business OMEs accessing external funding sources to help with business development?
5. How do North East micro business OMEs innovate their operations?
6. How are micro businesses in the North East of England positioned to meet future challenges?

The sixth aim's recommendations have been built in to the five categories.

With regard to planning, reasons have been given as to why the standard one-size-fits-all style of businesses planning needs to be changed; where growth is concerned, a line has been drawn between the reasons behind the business being set up and, for those wishing to try and grow, possible routes to explore; the issues surrounding business support are also discussed and which highlight the problem of gaps in coverage in rural areas as well as the fear that OMEs have when recruiting staff; regarding funding, given that the research showed that OMEs of micro businesses tend to fund their businesses from their own funds, the issue of supplying alternative funding sources is tackled; and regarding innovation, the problem faced by local governments when dealing with low-tech micro businesses is highlighted.

The research into these aims pertain to micro businesses operating at a bespoke level, with a focus on the picture framing trade. These answers are particular to the North East as the region has its own unique economic history which has left its own set of post-industrial problems in which micro businesses across the region have to operate under. The problems and opportunities faced by the OMEs of picture framing businesses are similar to each other and may well be similar to other micro businesses and/or trades operating across the region, especially low-tech ones. So, although this thesis is a case study concerning the picture framing trade in the North East, it can be used as a benchmark against other low-tech micro businesses across the region in future studies.

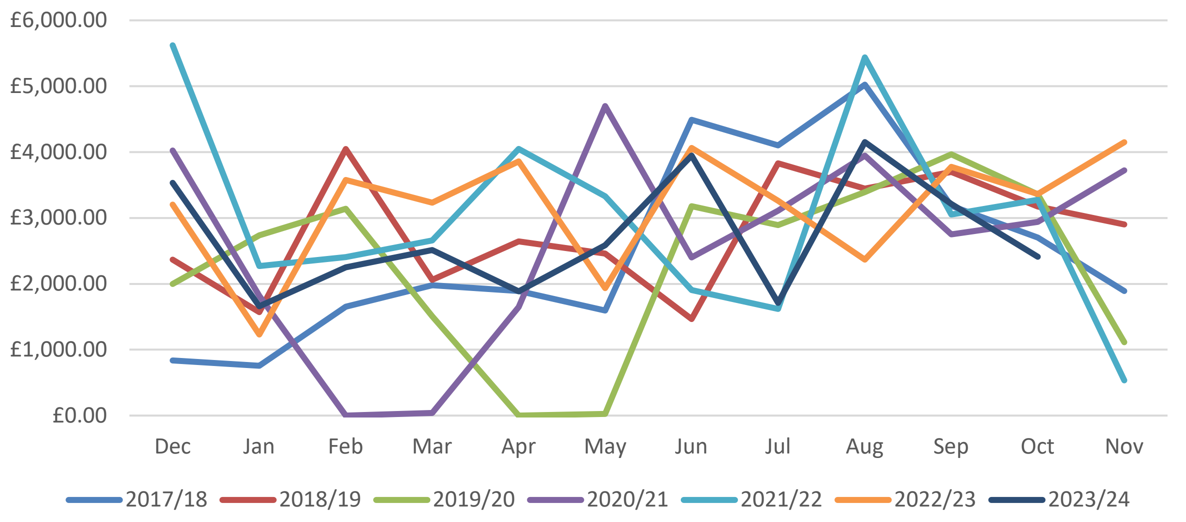
Planning

This research has backed up the thinking that micro-OMEs plan on an almost daily basis, making changes where and when required. It's just that they don't do it in a formal manner as they are the only ones that need to know what's happening and need to make small incremental changes quickly. Lenders, business support agencies and education establishments all need to recognise that the standard one-size-fits-all business plan is of little use to micro businesses in these situations as they tend to react to changes within the business environment on a need to change basis when it occurs. These changes can be small and regular, therefore negating the use of a large business plan that is covering a 6 or 12-month period as they are too unwieldy.

Therefore, although OMEs need to be aware of the importance of planning, especially for events regarding cash flow or investment, short-term planning should be encouraged so as to allow OMEs to see how planning for events may help them to survive. It's pointless trying to make OMEs use a document that they are never going to look at again, as the OMEs will not take the process seriously and will take avoiding action towards planning, and possibly even future investment borrowing, if they think that it will entail a lot of paperwork. They need to be encouraged to plan to survive and/or grow by utilising their skills in adapting to fast-changing business environments.

As an experienced Business teacher of some 18 years, the researcher always used to teach students that once a business has at least one years' worth of sales figures, it can work out where its peaks and troughs were and plan accordingly. However, having run his own micro business for the last seven years, the researcher can show that this institutional way of teaching about planning has been proven wrong (Image 24) as the only obvious trend that can be seen is that January's sales are lower than December, and even that wasn't true one year!

Image 24 - Monthly Sales for Whitby Picture Framing



Therefore, could micro-OMEs be encouraged to plan on a quarterly basis if required to do so – such as when applying for a loan for example? This then allows for occurrences to be built in that may have affected sales over a given period such as illness or economic changes that affect the trading environment, or even black swan events.

Growth

The desire for growth is dependent on the purpose that the business was originally set up for. If the business was set up as a second income then this research has shown that OMEs do not have any interest in growth – they are making a lifestyle decision. Any attempt by business support agencies or local government to encourage these businesses to grow are likely to be met with little interest.

For micro-OMEs wishing to grow, it may involve the learning of additional skills so as to become a specialist that is sought out or becoming a one-stop-shop that offers a range of complimentary services. This is where the support of agencies or local government could come in, as both options would require time and financial support for training, as well as finance for any equipment purchases that are required. Careful research into the additional services to be provided will also be required so as to try and avoid moving into a shrinking market that is already over supplied. For example, this research showed that the revenue from selling prints from a workshop space has fallen dramatically over the last decade due to competition from online sources.

Another possible option would be to link with a successful company that provides a complimentary good, such as that done by Wensleydale Galleries who have closed their gallery space and instead linked up with the award winning artist Lucy Pittaway (Mitchell, 2023). They now provide her framing requirements for her seven gallery locations and from her online sales, with each of the entrepreneurs doing what they do best. However, if independence is to be maintained, care must be taken as this may mean becoming overly reliant on one customer, as the micro business becomes overly reliant on a single source of income (Khosla, 2012); (Yli-Renko *et al,* 2020). Again, the support of local agencies or government could be very useful in this regard as they may be able to introduce complimentary businesses to each other based on data base information that they may hold. This is also an area where local business networking hubs may come in useful, if OMEs can be persuaded to use them.

Business support

The demands from businesses and academics for business support are becoming increasingly complex when considering the range of businesses that need support. A one-size-fits-all policy is easier to manage, but has proven not to work in many circumstances, and many micro-OMEs do not even bother seeking support – or at least not until they are desperate, which is sometimes too late.

Even micro business can be divided into two types of production – high or low-tech. High-tech micro businesses are more likely to be fast growing and potentially international, so will need business support in these areas. Low-tech micro businesses are more likely to operate either in a specialist line of work that draws in customers from a wide area or deal primarily with local customers. So again, the type of business will determine the type of support needed, as well as whether they are an urban or rural based business.

Therefore, targeted support that caters for individual requirements may be nigh on impossible to achieve. But a more targeted support package for a particular industry or set of similar industries, such as the creative industries, may be more possible.

Whatever form low-tech micro businesses take in future in the North East, it's likely that they will remain more of an artisanal form of business that doesn't rely on modern technology to make their products: something that works against what the North East Local Enterprise Partnership (NELEP) is trying to achieve. If the NELEP wants to modernise these micro businesses, then an effective funding and support package will have to be put in place to attract existing, and new, OMEs to invest in this technology, and this package will have to be well communicated to both urban and rural based businesses.

There are some gaps in business support in rural areas of the North East and these regions need to be better serviced with this support given that many rural entrepreneurs are HBBs.

A big area that was brought to light in this research that concerns OMEs of micro businesses is the employment of staff. Many are deterred from it by the thought of the increased paperwork and cost, as well as the problems of finding the correct staff. Advice and support in this area may well help to allay these fears and aid employment growth.

Business support agencies will, however, still face a major problem in that micro business OMEs do not actively seek support – either financially or operationally, very often. They are much happier to rely on their own instincts. So should these organisations be more pro-active in raising awareness of their services? Not once has the researcher been approached by a support agency in the last seven years of trading. But it is a bit of a chicken and egg situation regarding whose responsibility it is to approach whom first.

Funding

What is clear from this research is that micro-OMEs do not seek external funding very often to either start their business or grow it – they prefer to use internal funding so as to avoid any debt. There is also a reluctance to invest in new equipment which may be due to 75% of the respondents in this research being over 50 years old and not wanting to invest heavily in the future as a result of their age.

Within the picture framing trade, there is also a reluctance to borrow and invest in the future due to the difficulty of selling such businesses as a going concern. This is due to the nature of the business in that customers will often return to the business because of the skills of the framer personally, and the trust that they put into that person.

Funding is often available to new businesses for the first three years, although that will differ from region to region, with a wider range of sources available to people below 30 years old. However, there is an argument that older people from poorer areas also need support if they are to try and open new businesses as they may not have had the opportunity to acquire the required funds for themselves through other sources. Therefore, funding in the form of grants or loans should be made available to all entrepreneurs of any age, perhaps on a means tested basis. Better promotion and understanding of the UK Governments Loans Guarantee Scheme by both banks and support agencies may also help to encourage borrowing and investment by micro-OMEs, especially those with a good credit record.

Innovation

NELEP are wanting to promote innovation in micro businesses across the North East region which is great if they are high-tech, but what about the low-tech ones? Is there anything being developed that is likely to revolutionise the trade that a low-tech micro business operates in? Using the picture framing trade as an example, there is nothing that the researcher is aware of and, if these findings are to be believed, then the size of the market is likely to further contract in future, so why would high tech companies want to invest in the development of new machinery for a shrinking market? The best that NELEP can hope for with regards to the framing trade is that entrepreneurs switch to more advanced and efficient versions of the equipment that they already use which, for small volume manufacturers such as bespoke picture framers, is unlikely to happen on a large scale going off this research. Other industry sectors may have more potential for technological innovation but more research into this would be needed.

However, innovation is not just about technology. Innovation also includes systems and approaches that a micro business can use. Therefore, is there a way that a support agency or local government could help low-tech micro businesses to improve their work flow? Could they help to improve their marketing in some way, for example online? Could the OMEs be offered training on accounts software or the use of Microsoft Excel to help monitor cashflow? Are there other ways that support can be given that allows low-tech micro businesses to innovate in some way?

Due to the proven reluctance of micro-OMEs to seek business support, poorly targeted promotion of such support will give the same results as in the past. It's probable that low-tech micro businesses such as picture framers will continue to work the way that they have been for the last 50 years or so, basing themselves in low visibility locations, and continuing to work in solitude, only meeting others in their line of work via electronic means. There will just be less of them, meaning that consumers will have to work harder to find them and travel further to use those services.

Chapter 8 - The educational journey

This thesis has reported on the previous research into micro businesses that has gone on around the world in Chapter 2, then explained the methodology to be employed in my own research in Chapter 3. In Chapter 4, research findings concerning the context on the picture framing trade was provided, while Chapter 5 recorded the findings of the research into micro picture framing businesses in the North East of England. Chapter 6 provided an analysis of the research findings and Chapter 7 provided some recommendations based on the findings.

In Chapter 8, a record of the educational journey that I have undergone over the previous four years is provided. This chapter outlines the highs of confidently starting the journey based on a lifetimes experience in both the trade to be researched and as an educator of some 18 years, through the lows of the realisation of my limitations in knowledge and feeling that it was all too much, and into the joys of achieving what I had begun to feel was impossible to achieve.

All of these highs and lows have culminated in this thesis, on a topic close to my heart, on an industry never studied academically and in region that has suffered badly from de-industrialisation but is where I was born and raised.

The journey

Upon setting out on my PhD journey in the Autumn of 2020, I was confident that my skill set would set me in good stead. As an experienced teacher I had guided many a student through their educational journey at both secondary and higher level; as an OME of a micro picture framing business since 2017; and as a published author who had written a book about my own experiences of working and living in China. I was confident that I could write a thesis without many problems. However, I was only partially correct.

I quickly learned that my writing style was very personal and lacked the academic application required at this level. Therefore, I had to spend the next couple of years changing and adapting my writing style to fit the rigours of academic writing, and getting used to providing evidence to back up what I was saying, as opposed to giving my own opinion based on experience and observation. Being personally involved in the industry in which I was studying did potentially pose some ethical issues as I already had my own ideas on where the industry was going as a whole, and had to make sure that I didn't taint any of the research findings with my own thoughts. My experience as a teacher allowed me to ensure that this distance was maintained, especially as my own business is not actually in the North East of England and therefore could not be included in the findings in any case.

My initial literature review covered a multitude of themes, and quickly revealed to me how learning at this level had changed since I'd last studied in 1997! I felt that there was an assumption at the start of the course that all PhD students had studied relatively recently and so therefore knew the current research and analytical tools available to students.

However, research portals such as Google Scholar were new to me, as was using the likes of online journals. I therefore had to learn a lot from the initial guidance provided by the university to all new PhD students, which included the use of software such as Zotero and Nvivo.

One of the main problems that I faced when doing the literature review was the lack of research into micro businesses not just in the North East, but the UK in general. In order to be current, the initial search criteria, of which many search terms had to be used, went back to 2010 for the UK, but this was quickly expanded to research in other developed economies as the shortage of research data became evident. In fact, the shortage of research data on micro business has even been a topic of research!

This lack of prior research data, which was fragmented in terms of content, led to problems when trying to present a balanced argument for the North East of England and led to further research of literature towards the completion of my thesis. Several more recent reports were found to have been published, not on picture framing but micro businesses which showed the benefit of returning to the task. However, trying to achieve the balanced argument was never going to be possible due to the imbalance in published reports – it's like Manchester City playing against Whitby Town FC, it's always going to be a one-sided game.

The methodology section introduced a whole new challenge for me, as I'd blanked this section of my bachelor's degree from my memory over time. It proved to be one of the most challenging sections of the thesis as it required a change in my approach to learning. It required some guidance from my supervisors regarding the direction to take as I hit an academic wall that I had to navigate over or around. This wall was soul destroying and I began to doubt whether I would ever be able to complete the research project. However, after several months of research into what the main ideas were behind the theory of methodology, via the good old-fashioned route of books in the library, I was able to begin to construct my approach using the ideas of leading protagonists and linking the theories to my proposed practice. In the end, it proved to be one of the most satisfying sections to complete as I felt that from an academic perspective I had demonstrated my ability to absorb new ideas and then put them into practice.

Finally, I was ready to begin my research with a pilot study to test the research design. This pilot study not only provided some valuable base data regarding OMEs choices, but also revealed how difficult it was to firstly persuade OMEs to talk to me, and then to organise a mutually acceptable time to meet!

Upon the completion of the pilot survey, an analytical technique had to be decided upon. Having come across an answer grid system designed by Venckuviene (2014), it provided me with a basis on which to design my own answer grid. Further research on analytical techniques then led me to thematic analysis, a technique that had been pioneered after I had finished my bachelor's degree in 1997, and one which I had to learn about in order to fully utilise as it appeared to fit in to my first instincts on how to record and analyse the results.

Once the decision to use thematic analysis for the main research results as well was made, I began to approach OMEs via email requesting their participation in the research. The results of this revealed that ICT isn't always the best method to approach potential participants – the personal attributes of using the phone proved to be far more effective. The use of thematic analysis also allowed me to adapt the research as it progressed, with some research points becoming more important than others.

My initial writing style favoured the use of words to describe what was happening, something that I had to alter to facilitate the use of tables and graphs, both to fit in with the word count and to make the thesis a bit more user friendly. I also had to adapt to the fact that my thesis was likely going to be read and used by other academics who understood the theories and concepts that I was using, therefore negating the need to explain them in any depth. Additionally, the temptation to add my own thoughts to the results was huge due to my closeness to the topic and I had to rewrite the section several times to ensure that I had only recorded what was said by the OMEs in the research.

I'm a very logical thinker and a person that likes to get things done in one go – I don't like to repeat things. Therefore, I had to change my approach again when it came to Chapters 6 and 7 as originally I had tried to combine my research results with the conclusions for each of my research aims. This didn't really fit in with the academic style expected, so had to adjust my approach to suit, once again showing my adaptability to different requirements.

My journey has taken me from an eager mature student with a very basic idea of what I was trying to accomplish, through the despair of realising that I didn't know everything and feeling that the academic walls were too high to climb, to being shown where the ladder to a successful completion of the thesis was. It's been a journey of many highs and lows, completed in just over 3 years whilst running my own micro business and helping master's students with their own dissertations.

I'm looking forward to a rest!

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Appendices

Appendix 1

Entry barriers derived from the literature survey and results of the research carried out by Lutz, Klemp & Gerhard (2010)

Type of barrier	Barrier to entry	No. of times SMEs declared it a barrier	Source
Structural	Access to distribution/selling expenses	13	Porter (1980), Yip (1982), Karakaya and Stahl (1989), Han et al. (2001)
	Access to knowledge/skilled labour/patents/ technological change	3	Yip (1982), Harrigan (1983), Karakaya and Stahl (1989), Shepherd (1997)
	Advertising	14	Spence (1980), Harrigan (1981), Yip (1982), Netter (1983), Schmalensee (1983), Karakaya and Stahl (1989)
	Capital requirements	22	Bain (1956), Porter (1980), Harrigan (1981), Yip (1982), Karakaya and Stahl (1989), Shepherd (1997)
	Sales volume	23	Yip (1982)
	Cost disadvantages or experience disadvantages of newcomers	19	Bain (1956), Scherer (1970), Yip (1982), Karakaya and Stahl (1989), Geroski et al. (1990), Han et al. (2001)
	Costs of capital/special risks and uncertainties	18	Demsetz (1982), Shepherd (1997)
	Customer switching costs	7	Porter (1980), Klemperer (1987, 1992), Karakaya and Stahl (1989), Shepherd (1997), Shy (2002)
	Differentiation	16	Bain (1956), Porter (1980), Schmalensee (1982), Karakaya and Stahl (1989), Shepherd (1997), Martin (2002)
	Economies of scale	17	Bain (1956), Dixit (1980), Scherer (1970), Spence (1980), Harrigan (1981), Schmalensee (1981), Yip (1982), Geroski et al. (1990),
	Government regulations—licences and policies	12	Porter (1980), Dixit and Kyle (1985), Karakaya and Stahl (1989), Shepherd (1997)
	Financial risk/sunk costs/asset specificity	21	Bain (1956), Porter (1980), Baumol et al. (1982), Geroski et al. (1990), Sutton (1991), Shepherd (1997)
Strategic	Limit pricing	6	Bain (1956), Milgrom and Roberts (1982), Geroski et al. (1990), Bunch and Smiley (1992), Singh et al. (1998)

	Masking profit/gaps and asymmetric information	8	Milgrom and Roberts (1982), Geroski et al. (1990), Bunch and Smiley (1992)
	Retaliation	4	Scherer (1970), Yip (1982), Karakaya and Stahl (1989), Bunch and Smiley (1992), Gatignon et al. (1997), Shepherd (1997), Thomas (1999)
	Collusion	2	Singh et al. (1998), Bain (1956)
	Excess capacity	15	Spence (1977), Dixit (1980), Harrigan (1983), Lieberman (1987), Bunch and Smiley (1992), Shepherd (1997), Singh et al. (1998)
	Securing input/control over strategic resources/location/vertical integration	1	Scherer (1970), Yip (1982), Karakaya and Stahl (1989), Shepherd (1997), Singh et al. (1998), Cabral (2000)
	Strategic behaviour advertising/brand name/ loyalty	10	Bunch and Smiley (1992), Singh et al. (1998)
	Strategic behaviour differentiation/packing the product space (20)	20	Schmalensee (1978), Bunch and Smiley (1992), Shepherd (1997), Cabral (2000)
	Strategic behaviour distribution channels	11	Singh et al. (1998)
	Strategic behaviour knowledge/pre-emptive patents	5	Bunch and Smiley (1992), Singh et al. (1998)
	Strategic behaviour R&D	9	Harrigan (1981), Yip (1982), Daems and Douma (1985), Bunch and Smiley (1992), Singh et al. (1998)

Appendix 2

Philosophies, research methodologies and types of research

Developed from the work of Ugwuowo (2016)

Philosophies & research methodologies	Use of	Type of research	Examples
Survey	Obtain data about practices or situation views at a given point in time.	Action	Aims to solve an identified problem based on recommendations made to a process.
Case study	Description of relationships that exist in reality.	Creative	Is lightly structured and is used in both practical and theoretical research to develop new theories, procedures or inventions.
Simulation	Copies reality and allows the introduction of variables that may change the outcome.	Descriptive	Case study research where a specific situation is researched to see if any general theories arise from it.
Subjective/argumentative research	Unstructured, used for generating new theories and ideas. Subject to research bias.	Experimental	Used widely in scientific research, it seeks to investigate effect and cause of changes to variables.
Action research	Researcher tries to develop results or solutions of practical value via application to develop theoretical knowledge.	Ex-post facto	Usually done after experimental research using the data generated, the cause is researched from the effect.
		Expository	Using only existing data, it seeks to review what is already known from a wide range of sources to develop new insights.
		Historical	Using past data to determine what might happen now or in future.

Appendix 3

Construction of questionnaire

1st questions block.

Motivation factors

1. Acquired education (application of specific knowledge and experience)
2. To prove to myself that I can create and elaborate business
3. To earn more money
4. To ensure future (workplace)
5. Internal motivation (wanted to be a chief for myself)
6. Work independently
7. **Finding the business niche/got a clear idea of business**
8. **Encountered a problem and its solution has evolved into a business**
9. **Self-fulfilment in a business**
10. Pursuit for entrepreneur's status in the society
11. Family, friends' encouragement
12. **Successful experience of relatives or friends**
13. Recognition worldwide
14. **Creation of workplaces for family members / friends**

2nd questions block.
Barriers for development

1. Huge bureaucracy
2. Lack of working capital
3. **Overcharging business at the beginning**
4. The lack of initial capital to start a business
5. **Complicated recruitment process of qualified specialists**
6. **Complexity of business registration procedures**
7. Sophisticated business credit conditions
8. **Problems in creating business infrastructure**
9. **Lack of technological knowledge**
10. Lack of market knowledge
11. Uncertainty for product demand
12. Business consultation institutions providing fragmented services
13. **The lack of corporate governance knowledge**
14. **The lack of business plan preparation knowledge**
15. Lack of information on the business creation
16. **Lack of networking**

3rd questions block.
Success factors

1. Good leadership skills
2. **The ability to work with people and effectively managed human resources**
3. **Product meeting the consumers' needs**
4. Manager's charisma
5. **Proper business leadership/development competence**
6. The favourable business support conditions
7. **Contact network**
8. Put a lot of efforts (hard work)
9. Market specifics knowledge
10. **Social skills (communication ability)**

11. Good marketing/sales strategy
12. competitive price
13. Entrepreneur popularity (well known in society)

Source: adapted by Venckuviene (2014) with reference to Stefanovic (2010) and Zimmerman and Chu (2013)

Appendix 4

Questionnaire on barriers to growth of micro businesses in North East England

Business owners name

Name of business

Nature of business

Location of business

Background

1. Are you: **Male** **Female**

2. What age bracket do you fall into *(please circle your answer)*?

25 or under	**26 – 35**	**36 – 45**
46 – 55	**56 – 68**	**69 or above**

3. What is your highest level of qualification *(please circle your answer)*?

Post graduate	**degree**	**HND/HNC**
A Level/BTEC/AVCE	**GCSE/O Level**	**Other**

4. How many years have you been in business with the current venture? ……………….

5. Did you *(please circle your answer)*?

Set up this business **Inherit this business** **Buy this business**

6. How many employees do you have?

0 1-9 10-50 51-250

7. Which of the following brackets does your annual turnover fit in to?

Below £40k	**£40-85k**	**£85-250k**	**£250-500k**
£500k-1 mil	**£1-3 mil**	**£3-6.5 mil**	**Above £6.5 mil**

8. Did you have any experience of the type of business that you're in before setting up your own business *(please circle your answer)*? **Yes** **No**

9. If yes, how many years? …………………………………………….

10. Please give brief details of your experience (e.g. level of responsibility)
11. Have you owned a business or businesses before this one *(please circle your answer*)? **Yes** **No**

12. If yes, how many businesses have you owned? ……………………………………………….

13. Were they in the same industry?

Motivational factors behind you setting up your business

14. What made you set the business up in the North East?

    a. Did you consider any other areas?

15. What was the motivation for setting your current business up?
    Select all applicable answers
    a. To prove to yourself that you can create a business.
    b. To earn more money.
    c. To ensure your future (e.g. due to redundancy).
    d. Internal motivation (wanted to be a manager for myself).
    e. Work independently.
    f. Found the business niche.
    g. Had a clear idea of the business format due to experience.
    h. Encountered a problem and its solution has evolved into a business.
    i. Self-fulfilment in a business.
    j. Pursuit for entrepreneur's status in the society.
    k. Family or friends' encouragement.
    l. Successful experience of relatives or friends.
    m. Creation of workplaces for family members/friends.
    n. Improve work/life balance
    o. Other (please state) ……………………………………………………………………

Barriers encountered during set up and in the first three years of trading

15a. Did you encounter any barriers when you were setting up or running the business in the first few years?

Select all applicable answers.

a. High levels of bureaucracy.
b. Overcharging by suppliers.
c. Lack of initial capital to start a business.
d. Lack of working capital for new investment.
e. Complicated recruitment process for qualified specialists.
f. Complexity of business registration procedures.
g. Sophisticated business credit conditions for buying.
h. Sophisticated business credit conditions for selling.
i. Problems in creating and developing business infrastructure (e.g. systems for communication).
j. Lack of technological knowledge.
k. Lack of market knowledge.
l. Uncertainty for product demand.
m. Business consultation institutions providing fragmented services.Not sure how to run a business.
n. The lack of business plan preparation knowledge or continuing use of.
o. Lack of information on the business creation.
p. Lack of networking opportunities

15ai. Were you able to overcome these barriers?

Yes **Not easily** **No**

How did you overcome them if you were able to?
………
………
………
………
………
………
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………
………
………
………
………

15b. Have you had any support from business support agencies?

15c. Do you want to grow the business in any way?

Success factors

16. Do you actively do any strategic planning?
    Yes Not actively No

17. Do you use networking in any way to build your business?

    Yes Not actively No

18. Has new technology had a major impact on either the way you or your competitors do things?
    Yes No

19. What do you feel are the most important factors to your success so far as an entrepreneur?
    Select your answers by **CIRCLING** the letter.
    a. Good leadership skills.
    b. The ability to work with people and effectively manage human resources.
    c. Product/service meeting the consumers' needs.
    d. Owner/manager's charisma.
    e. Proper business leadership/development competence.
    f. Favourable business support conditions.
    g. Contact network.
    h. Working hard.
    i. Working SMART (Specific, Measurable, Achievable, Realistic, Time bound).
    j. Market specific knowledge (experience).
    k. Social skills (communication ability).
    l. Good marketing/sales strategy.
    m. Competitive price.
    n. Entrepreneur popularity (well known in society).
    o. Business planning (other than for loan applications).
    p. Other (please state) ………………………………………………………………………

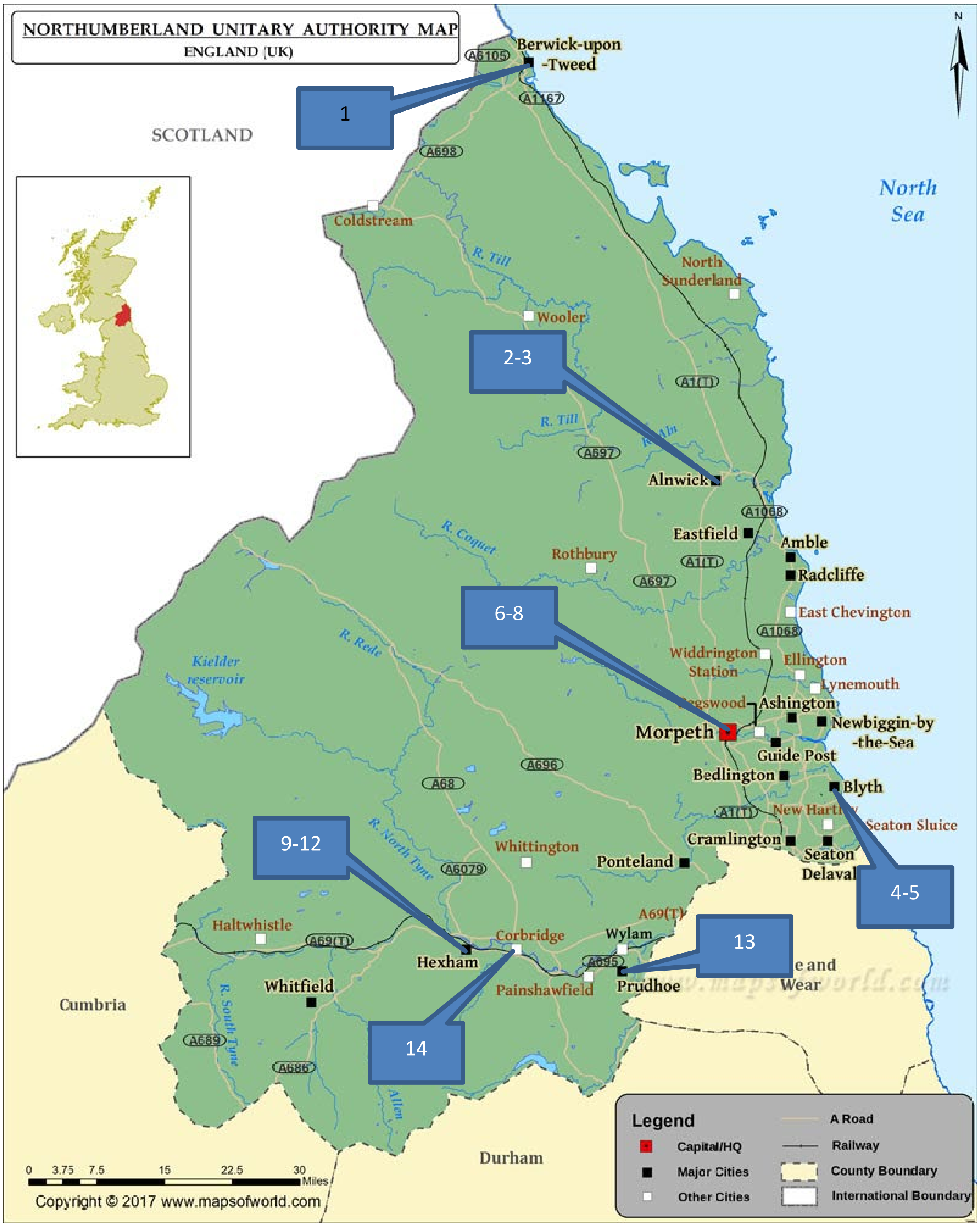
Thank you for completing this questionnaire.

Appendix 5

Picture framers in Northumberland

	Name of business	Address	Phone number	Email address	Website address	Location of business			Average income for the area
						Out of town	Town centre	Home based	
1	Neil & Sues Picture Framing	65 Castlegate, Berwick-upon-Tweed TD15 1LF	01289 331479				Yes		£25,900
2	The Framing Department	Ventex House, Willowburn Trading Estate, Alnwick NE66 2PF	01665 600901	theboss@theframingdepartment.co.uk	www.theframingdepartment.co.uk	Yes			£28,200
3	Wilson Taylor	24 Green Batt, Alnwick NE66 1TS	01665 510937					Yes	
4	Frameworks	24 Bridge St, Blyth NE24 2BP	01670 355304	frameworksblyth@gmail.com	http://www.frameworksblyth.co.uk/		Yes		£25,700
5	Star Framing	9 Bowes Street, Blyth, NE241BD	01670 364903	nicklin_j@sky.com			Yes		
6	Oldgate Gallery & Framing	10 Oldgate, Morpeth NE61 1LX	01670 505566				Yes		£28,300
7	Chantry Framing	Unit 1 Chantry Courtyard, Chantry Pl, Morpeth NE61 1PJ	01670 510368	chantryframing@gmail.com			Yes		
8	Tallantyre Limited	43-45 Newgate Street, Morpeth, Northumberland, NE61 1AT	01670 517214	art@tallantyre-gallery.co.uk	www.tallantyre-interiors.co.uk		Yes		
9	Collier Framing	2, Acomb Industrial Estate, Acomb, Hexham NE46 4SA	01434 606913	collierframing@gmail.com	http://www.collierframing.co.uk	yes			£30,700

10	Thomas Ellis *Jim Cowell*	7 Beaumont St, Hexham, NE46 3LZ	01434 602050				Yes		
11	MLJ Framing	Eastfield Low Park, West Woodburn, Hexham, NE48 2SQ	01434 270238					Yes	
12	Stait Photography	25 St Marys Chare, Hexham, Northumberland, NE46 1NQ	01434 608747		www.staitphoto.co.uk		Yes		
13	Castle Framing & Gallery	2 Dukes Ct, Prudhoe NE42 6DA	01661 836846		www.castleframing.com	Yes			£28,900
14	Off The Wall Gallery	24 Hill St, Corbridge NE45 5AA	01434 634939				Yes		£34,000
Number of framers by location						3	9	2	
Number of framers by location as a % (rounded up/down)						21	64	15	

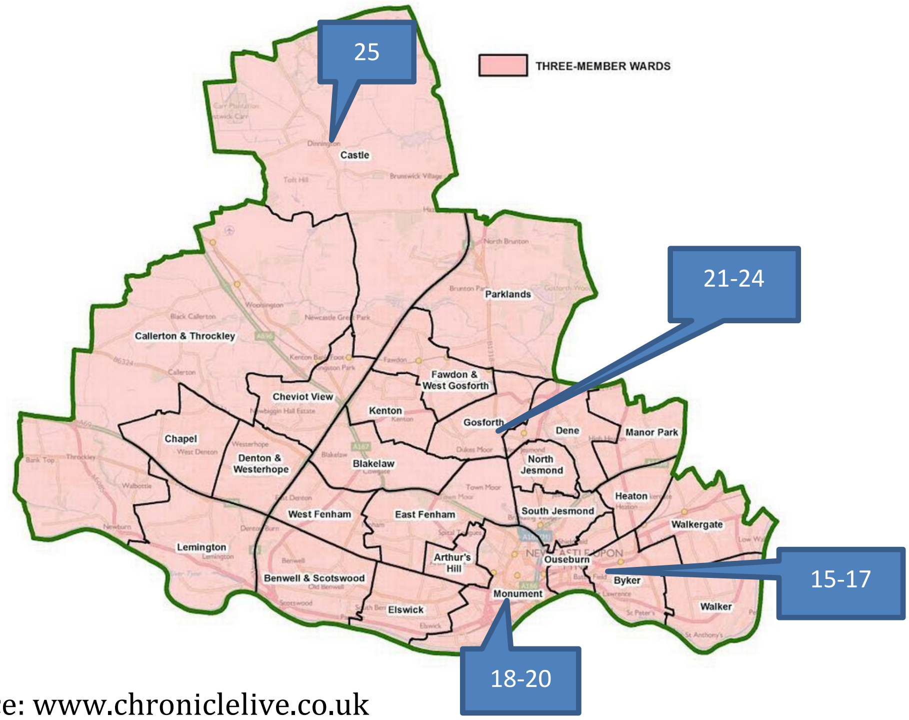

NORTHUMBERLAND UNITARY AUTHORITY MAP
ENGLAND (UK)
SCOTLAND
North Sea
Berwick-upon -Tweed
Coldstream
North Sunderland
Wooler
Alnwick
Eastfield
Amble
Radcliffe
Rothbury
East Chevington
Widdrington Station
Ellington
Lynemouth
Ashington
Newbiggin-by -the-Sea
Morpeth
Guide Post
Bedlington
Blyth
Seaton Sluice
Cramlington
Seaton Delaval
Kielder reservoir
Whittington
Ponteland
Haltwhistle
Hexham
Corbridge
Wylam
Prudhoe
Painshawfield
Whitfield
Cumbria
Durham
1
2-3
4-5
6-8
9-12
13
14
Legend
Capital/HQ
Major Cities
Other Cities
A Road
Railway
County Boundary
International Boundary
Copyright © 2017 www.mapsofworld.com

Appendix 6

Picture framers in Newcastle

	Name of business	**Address**	**Phone number**	**Email address**	**Website address**	**Location of business**			**Average income for the area**
						Out of town	**Town centre**	**Home based**	
15	Renwick Picture Framing	Byker Business Development Centre - i2, Albion Row, Newcastle upon Tyne NE6 1LQ	0191 265 5264	renwickframing@gmail.com	www.renwickpictureframing.co.uk	Yes			£24,000
16	Reid Framing	Hoults Estate, Walker Rd, Byker, Newcastle upon Tyne NE6 1AB	0191 224 3422	breidframing@yahoo.co.uk	www.pictureframingnewcastle.co.uk	Yes			
17	Factory Framing Centre	8 St Lawrence Rd, Newcastle upon Tyne NE6 1AR	0191 276 4489	factoryframingcentre@gmail.com	www.factoryframingcentre.co.uk	Yes			
18	Frameshop	Black Swan Court, 69 Westgate Rd, Newcastle upon Tyne NE1 1SG	0191 222 9881		www.newcastle-arts-centre.co.uk		Yes		£26,100
19	Grainger Crafts & Framing	68, Grainger Market, Nelson St, Newcastle upon Tyne NE1 5QQ	0191 260 3050	graingercrafts@outlook.com			Yes		
20	Gallagher & Turner	30 St Mary's Pl, Newcastle upon Tyne NE1 7PQ	0191 261 4465	gallery@gallagherandturner.co.uk	gallagherandturner.co.uk		Yes		
21	Matthew Bank Framing & Gallery	57 Matthew Bank, Gosforth, Newcastle upon Tyne NE2 3RD	0191 284 8471			Yes			£36,100

22	Robertson's of Gosforth Ltd	202 High St, Gosforth, Newcastle upon Tyne NE3 1HD	0191 285 4652	info@robertsonsofgosforth.co.uk	www.robertsonsofgosforth.co.uk		Yes		£35,300
23	Christopher Sparrow	42 Windsor Terrace, South Gosforth, Newcastle Upon Tyne, NE3 1YL	0191 285 0219					Yes	
24	Phoneaframe	23 Northumberland Ave, Forest Hall, Newcastle upon Tyne NE12 9NR	0191 266 1878					Yes	£30,600
25	Britannia Picture Company	Brunswick Industrial Estate, Brunswick Village, Newcastle upon Tyne NE13 7BA	0191 236 7949	brittaniapictureframing@hotmail.com		Yes			£30,800
Number of framers by location						5	4	2	
Number of framers by location as a % (rounded up/down)						46	36	18	

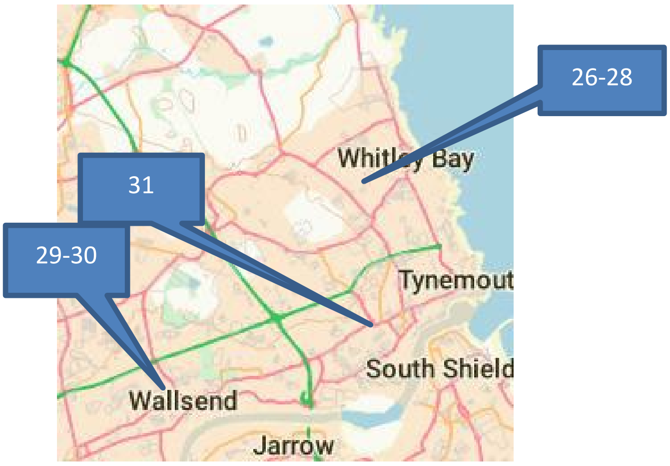


Source: www.chroniclelive.co.uk

Appendix 7

Picture framers in North Tyneside

	Name of business	Address	Phone number	Email address	Website address	Location of business			Average income for the area
						Out of town	Town centre	Home based	
26	Holly Frames	47 Park View, Whitley Bay NE26 2TP	0191 252 3900	jacks3105@yahoo.com	www.hollyframes.co.uk		Yes		£30,600
27	Framing Services	52 Victoria Terrace, Whitley Bay, NE26 2QW	0191 252 0038				Yes		
28	Kerrs	2 Hayward Ave, Seaton Delaval, Whitley Bay NE25 0AF	0191 237 2360			Yes			£27,000
29	Wallsend Framing Centre	283 High St E, Wallsend NE28 7JY	0191 234 2555				Yes		£25,400
30	Memory Lane	13 Border Rd, Wallsend NE28 6RX	07719 771248				Yes		
31	Thompson Art	4a Albion Rd, North Shields NE30 2RJ	0191 257 7510				Yes		£27,900
					Number of framers by location	1	5		
					Number of framers by location as a % (rounded up/down)	17	83		

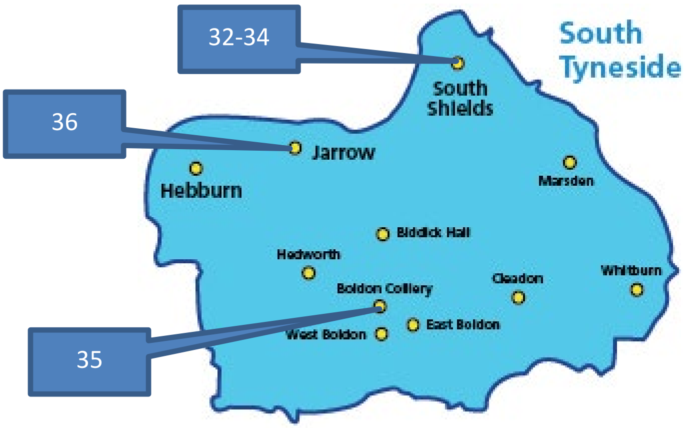


Source: www.geopunk.co.uk

Appendix 8

Picture framers in South Tyneside

	Name of business	Address	Phone number	Email address	Website address	Location of business			Average income for the area
						Out of town	Town centre	Home based	
32	The Picture Framer and More	106A Westoe Rd, South Shields NE33 3PF	07940 459121	julie@thepictureframerandmore.co.uk	www.thepictureframerandmore.co.uk		Yes		£25,000
33	Westoe Gallery	69 Westoe Rd, South Shields NE33 4LU	07901 928900				Yes		
34	North Star Arts	49 Bronte Way, South Shields, NE34 9JY	07477 939405	natalinap@live.co.uk				Yes	£25,200
35	Boldon Picture Framing	Bensham St, Boldon Colliery NE35 9LN	0191 537 4519	boldonframing@hotmail.co.uk	www.boldonframing.co.uk	Yes			£27,300
36	Contract & Bespoke Picture Framing	Unit 305, Tedco Business Centre, Viking Industrial Park, Jarrow, Tyne And Wear, NE32 3DT	0191 4283326			Yes			£25,100
					Number of framers by location	2	2	1	
					Number of framers by location as a % (rounded up/down)	40	40	20	

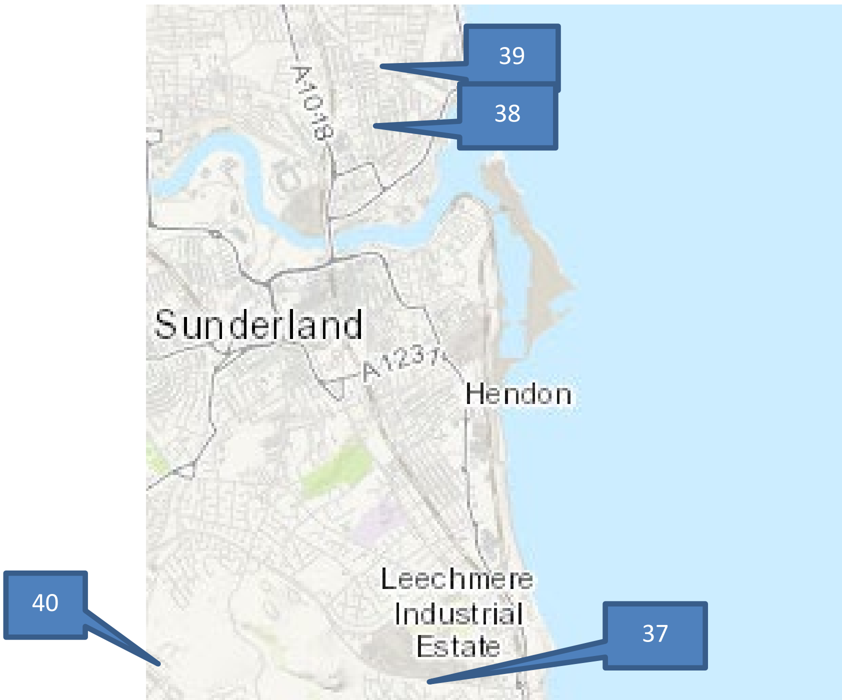


Source: www.southtynesideccg.nhs.uk

Appendix 9

Picture framers in Sunderland

	Name of business	**Address**	**Phone number**	**Email address**	**Website address**	**Location of business**			**Average income for the area**
						Out of town	**Town centre**	**Home based**	
37	The Picture Place	41 Carrmere Rd, Sunderland SR2 9TW	0191 521 4422	thepictureplacenortheast@gmail.com	thepictureplace.co.uk	Yes			£25,600
38	North East Picture Framing	Lower Dundas St, Monkwearmouth, Sunderland SR6 0BD	0191 565 3018	nepictureframing@gmail.com	northeastpictureframing.com		Yes		£28,100
39	Grays Framing/Compare The Artwork	101 Sea Rd, Roker, Sunderland SR6 9BN	0191 548 4060	info@graysgallery.co.uk	www.graysframing.co.uk		Yes		
40	Lakeside Picture Framer	Lakeside SSC, N Moor Ln, Sunderland SR3 3BD	07847 452894	alanscott796@aol.com	https://lakeside-picture-framer.business.site	Yes			£25,200
Number of framers by location						2	2		
Number of framers by location as a % (rounded up/down)						50	50		



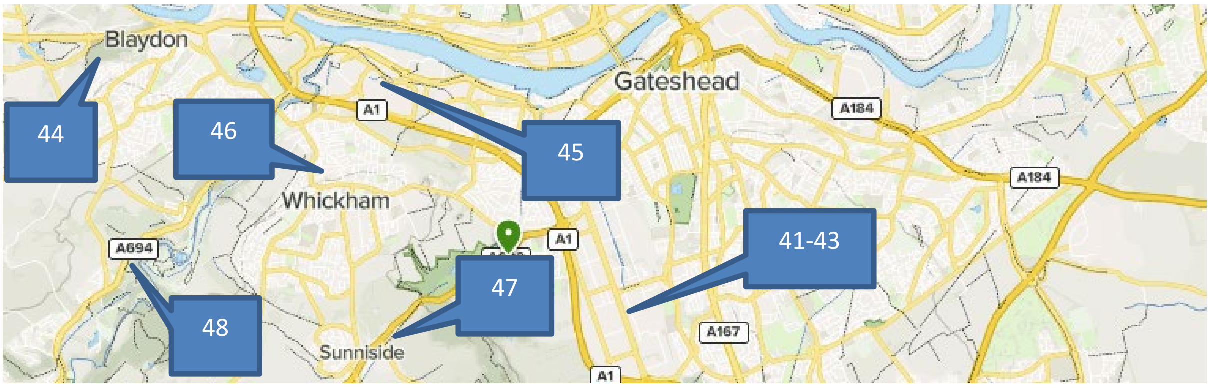
Source: www.nperf.com

Appendix 10

Picture framers in Gateshead

	Name of business	Address	Phone number	Email address	Website address	Location of business			Average income for the area
						Out of town	**Town centre**	**Home based**	
41	Team Valley Picture Framing	5/6, Douglas Court, Eleventh Ave, Gateshead NE11 0JY	0191 491 3913	info@picture-framingdirect.co.uk	www.teamvalleypictureframing.business.site	Yes			£26,400
42	Sport Memorabilia Framing	322b Mayoral Way, Team Valley, Gateshead NE11 0RT	0191 482 5388	info@sportmemorabilia.co.uk	www.sportmemorabilia.co.uk	Yes			
43	Mirror & Glass Processing Ltd	Unit 1 Dukesway, Team Valley Trading Estate, Gateshead, NE11 0PZ	0191 482 6660	info@mgp-uk.com	www.mirror-glass-processing.com	Yes			
44	Blaydon Factory Framing	8 Tundry Way, Blaydon On Tyne, NE21 5SJ	0191 276 4489	factoryframingcentre@gmail.com	www.factoryframingcentre.co.uk	Yes			£29,200
45	Art (Boldon Picture Framing)	48 The Galleria, Metrocentre, Gateshead, NE11 9YP					Yes		
46	Whickham Framing *Derek Armstrong*	10 Sunnidale, Whickham, Tyne & Wear, NE16 5TT	0191 488 5997					Yes	£29,900
47	Sidegate Gallery	1 Gateshead Road, Sunniside, Tyne And Wear, NE16 5LG	0191 488 3253					Yes	
48	Olde Potting Shed Co	Collingdon Buildings Collingdon Road, High Spen, Rowlands	01207 545577			Yes			£27,000

		Gill, NE39 2EQ							
Number of framers by location						5	1	2	
Number of framers by location as a % (rounded up/down)						63	12	25	



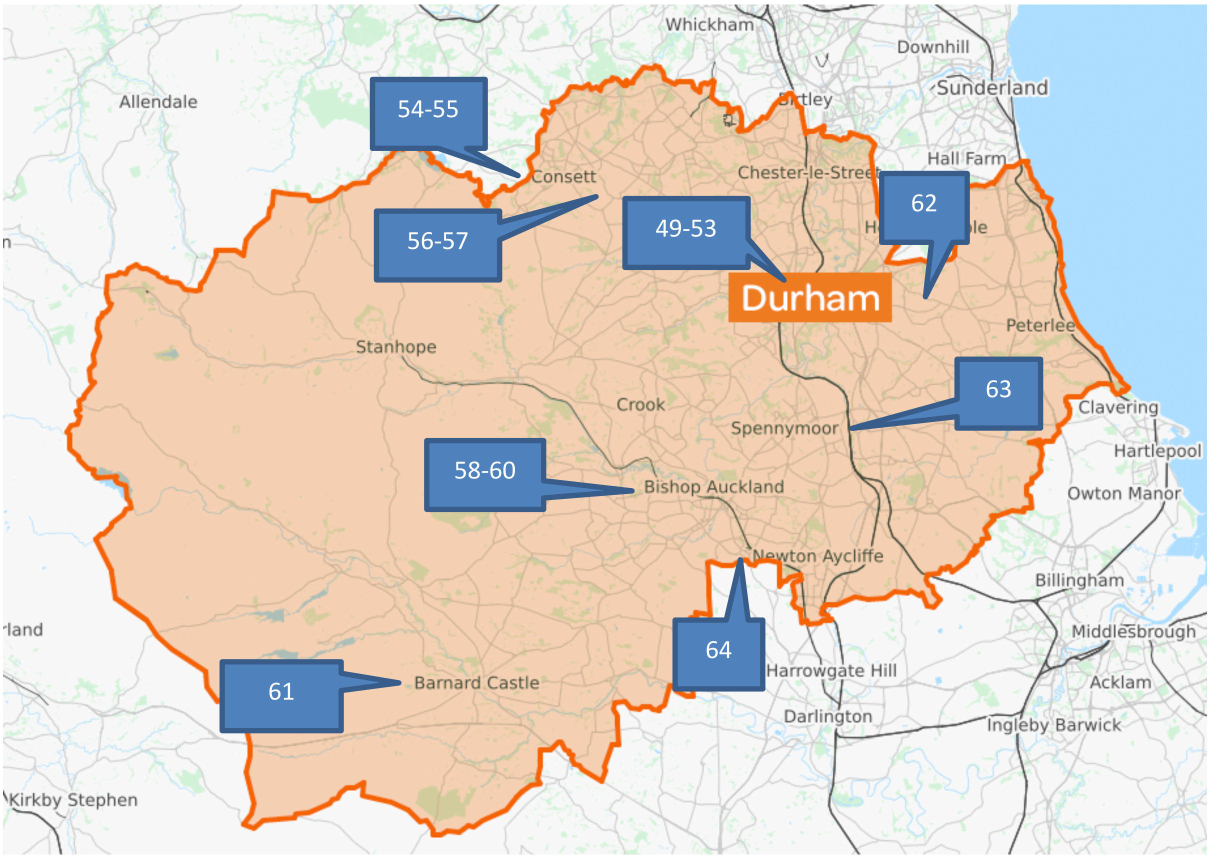
Source: www.alltrails.com

Appendix 11

Picture framers in County Durham

	Name of business	Address	Phone number	Email address	Website address	Location of business			Average income for the area
						Out of town	Town centre	Home based	
49	All Out Frames	12 Sniperley Grove, Durham DH1 5AA	07964 045059	alloutframes@hotmail.com	https://www.alloutframes.co.uk			Yes	£30,900
50	Framing Unlimited	Unit 22f Beehive Workshops, Damson Way, Durham, DH1 2XL	0191 649 9142		www.framingunlimiteddurham.wordpress.com	Yes			
51	Seasons Gallery & Framing	14 Church St, Durham DH1 3DQ	0191 386 0222	seasonsdurham@gmail.com	www.csons.co.uk	Yes			
52	Durham City Studios	89 Claypath, Durham DH1 1RG	0191 386 4486	bt@durhamcitystudios.com	www.durhamcitystudios.com		Yes		
53	The Kemble Gallery	62 Saddler St, Durham DH1 3NU	0191 386 4034	kemblegallery@gmail.com	www.kemblegallery.com		Yes		
54	The Frame House	5C, Number One Industrial Estate, Consett DH8 6SR	01207 260253	info@framehouse.co.uk	www.framehouse.co.uk	Yes			£26,600
55	Derwent Prints & Crafts	35B St Ives Rd, Leadgate, Consett DH8 7PZ	01207 508689				Yes		
56	Garrick Gallery	3 Anthony Street, Stanley, DH9 8AF	01207 284050			Yes			£27,100
57	The White Room Gallery	15 Station Road, Stanley, County Durham, DH9 0JL	01207 238957				Yes		
58	If-Its	57 Fore Bondgate, Bishop					Yes		£26,500

		Auckland DL14 7PE							
59	A. J. Meacham	Island House, St. Johns Chapel, Bishop Auckland, County Durham, DL13 1RF	01388 537084					Yes	
60	First Impressions Framing	Tindale Crescent Post Office, Tindale Crescent, St Helen Auckland, Bishop Auckland DL14 9SX	01388 417737	info@firstimpressionsukltd.com	www.firstimpressionsframing.com		Yes		£23,400
61	Sarah Jane Photography & Picture Framing	Cross Keys Farm, Boldron, Barnard Castle DL12 9SW	07701 342570	sarah@sjkphotoframe.com	www.sjkphotoframe.com	Yes			
62	HPF Picture Framing	Unit 2E, Thornley Station Industrial Estate, Thornley, Shotton Colliery, Durham DH6 2QA	07486 889505	hpfpictureframing@gmail.com		Yes			£26,600
63	Art Décor	Byers Green, Spennymoor, DL16 7PG	01388 812444				Yes		£27,100
64	Aycliffe Framers	43 Beveridge Way, Newton Aycliffe, DL5 4DU	01325 321280				Yes		£27,400
Number of framers by location						6	8	2	
Number of framers by location as a % (rounded up/down)						38	50	12	

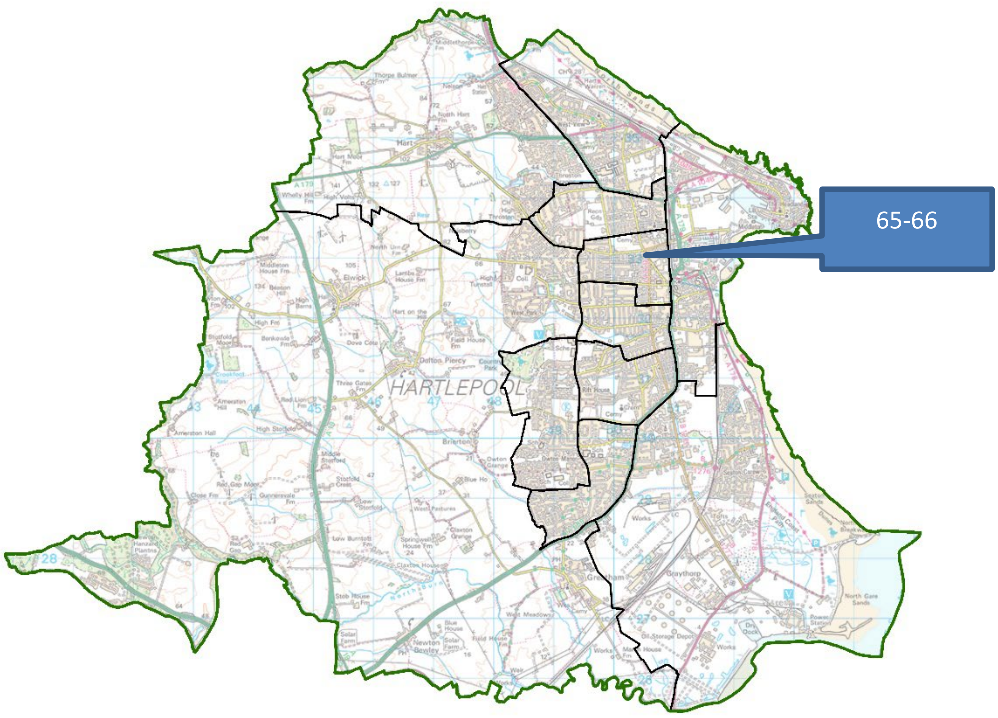


Source: www.smokefreecountydurham.co.uk

Appendix 12

Picture Framers in Hartlepool

	Name of business	Address	Phone numbe r	Email address	Website address	Location of business			Average income for the area
						Out of town	Town centr e	Home based	
65	La Mirage	64 Alma Street, Hartlepool, TS26 8AG	01429 868271				Yes		£24,400
66	Classic Art	123 Park Road, Hartlepool, TS26 9HS	01429 223949				Yes		
Number of framers by location							2		
Number of framers by location as a % (rounded up/down)							100		

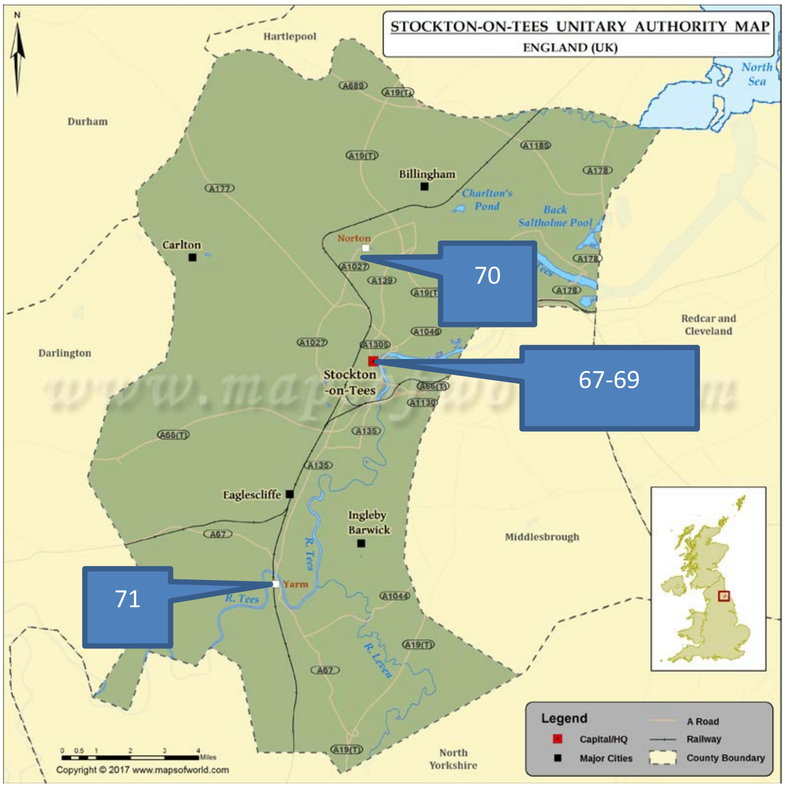


Source: www.lgbce.org.uk

Appendix 13

Picture framers in Stockton

	Name of business	Address	Phone number	Email address	Website address	Location of business			Average income for the area
						Out of town	**Town centre**	**Home based**	
67	Frame It 2000	5 Yarm Ln, Stockton-on-Tees TS18 3DR	01642 613190				Yes		£23,300
68	Lets Frame It	13 Yarm Ln, Stockton-on-Tees TS18 3DR	01642 613190	topbrand@aol.com	www.picturesframesstockton.co.uk		Yes		
69	Ace of Frames	66 Wren St, Stockton-On-Tees, TS18 4BJ		aceofframes@outlook.com				Yes	
70	Pic A Frame	4 Leven Rd, Norton, Stockton-on-Tees TS20 1BQ	01642 616737				Yes		£27,200
71	Yarm Framing	Arncliffe Buildings, 10 West Street, Yarm, TS15 9BU	01642 782150			Yes			£34,700
Number of framers by location						1	3	1	
Number of framers by location as a % (rounded up/down)						20	60	20	

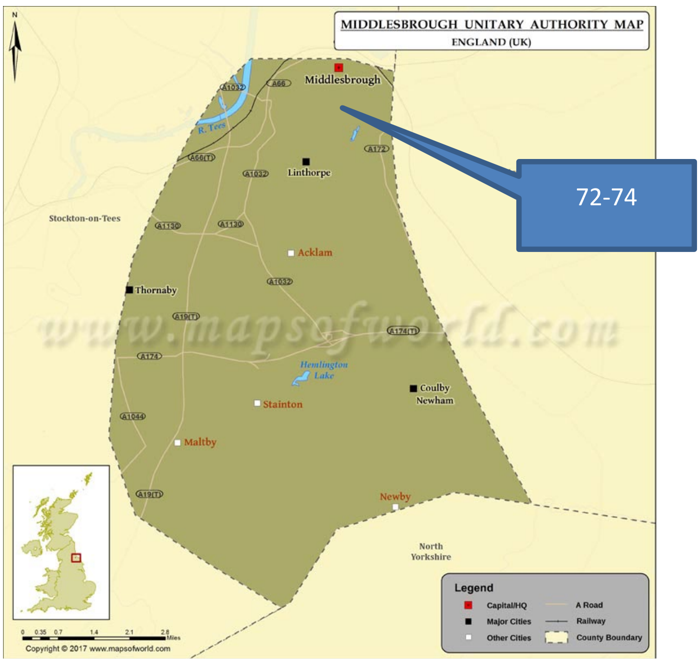


Source: www.mapsofworld.com

Appendix 14

Picture framers in Middlesbrough

	Name of business	**Address**	**Phone number**	**Email address**	**Website address**	**Location of business**			**Average income for the area**
						Out of town	**Town centre**	**Home based**	
72	Northern Framing/Art 4 All	Victoria St, Middlesbrough TS1 5QZ	01642 240666	northernframing@outlook.co.uk	www.northernframing.co.uk	Yes			£21,900
73	FrameRite	5 Oxford Rd, Middlesbrough TS5 5DY	01642 823802				Yes		£28,900
74	The Art House	353 Linthorpe Rd, Middlesbrough TS5 6AB	01642 828363	thearthouse1@btconnect.com			Yes		
					Number of framers by location	1	2		
					Number of framers by location as a % (rounded up/down)	33	67		

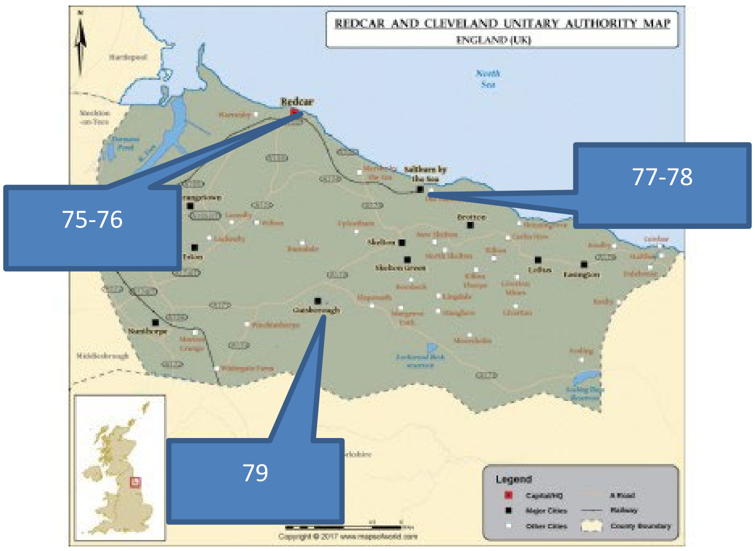


Source: www.mapsofworld.com

Appendix 15

Picture framers in Redcar & Cleveland

	Name of business	**Address**	**Phone number**	**Email address**	**Website address**	**Location of business**			**Average income for the area**
						Out of town	**Town centre**	**Home based**	
75	Phoenix Framing *Closed?*	15B Cleveland Street, Redcar, Cleveland, TS10 1AR	07875 386526				Yes		£23,700
76	Nigel Lee Photography	10 Cormorant Drive, Redcar, TS10 2QD	01642 474177	admin@nleephoto.com	www.nleephoto.com			Yes	
77	Hawkins Gallery	18 Milton St, Saltburn-By-The-Sea, TS12 1DG	07773 626392		hawkinsgallery.co.uk		Yes		£28,700
78	The Saltburn Framing Company	7, Station Buildings, Station Square, Saltburn-by-the-Sea TS12 1AQ	07903 548554				Yes		
79	Frame Design	5 Chaloner Mews, Guisborough, TS14 6SA	01287 630000	framedesign4@gmail.com	www.framedesign.co.uk		Yes		£26,200
Number of framers by location							4	1	
Number of framers by location as a % (rounded up/down)							80	20	



Source: store.mapsofworld.com

Appendix 16

Picture framers in Darlington

	Name of business	**Address**	**Phone number**	**Email address**	**Website address**	**Location of business**			**Average income for the area**
						Out of town	**Town centre**	**Home based**	
80	Frame-Craft	Enterprise Mall, Darlington DL1 4PJ	01325 617863	info@framecraftdarlington.co.uk	www.framecraftdarlington.co.uk		Yes		£31,100
81	Nicholson Restoration & Framing	54 North Rd, Darlington DL1 2EQ	01325 460319	tracey-nicholson@ntlworld.com	www.nicholsonantiquerestoration.com		Yes		
82	The Connection Gallery & Framers	119 The Broadway, Darlington DL1 1EL	01325 787373	richard.gladstone@richardgladstone.com	www.theconnectiongalleryandframers.com		Yes		
83	For Walls *Contract framer*	4,Endeavour Court, Lingfield Way, Darlington DL1 4JW	07711 210093	office@forwalls.co.uk	www.forwalls.co.uk	Yes			
84	Malcolm Hepper Framing	27 Whessoe Road, Darlington, DL3 0QP	01325 788186	malcolmhepperframing@gmail.com			Yes		£24,500
85	James Caverhill Conservation Ltd	Newtonhurst Stanhope Rd South, Darlington, DL3 7SF	07941 161317	james@jamescaverhill.co.uk	www.jamescaverhill.co.uk			Yes	
Number of framers by location						1	4	1	
Number of framers by location as a % (rounded up/down)						17	66	17	

Appendix 17

Fine Art Trade Guild Members in the North East

Out of 479 members in the UK

All Out Frames, 12 Sniperley Grove, Durham, DH1 5AA, UK
Telephone: +44 07964 045059
Email: alloutframes@hotmail.com
Website: http://www.alloutframes.co.uk

Holly Frames,47 Park View, Whitley Bay, Tyne and Wear, NE26 2TP, UK
Telephone: +44 0191 252 3900
Email: jacks3105@yahoo.com
Website: http://www.hollyframes.co.uk

The Connection Gallery & Framers,119 The Broadway, Darlington, Durham, DL1 1EL, UK
Telephone: 01845868010
Email: theconnectiongallery@btinternet.com
Website: www.theconnectiongalleryandframers.com

The Frame House Ltd, Unit 5c, No 1 Industrial Estate, Consett, Durham, DH8 6SR,UK
Telephone: +44 01207 588850
Fax: +44 01207 588840
Email: info@framehouse.co.uk

UK Industrial Tapes Limited, Brumwell House, Westway Industrial Estate, Throckley, Newcastle-upon-Tyne, NE15 9EW, UK
Telephone: +44 0191 269 7810
Fax: +44 0191 267 1028
Email: brian@ukindustrialtapes.co.uk
Website: http://www.ukindustrialtapes.co.uk

Appendix 18

Average salary and population per region

County	Average Salary (Plumpot, 2020)	Population at last count	Population per picture framer
Northumberland	£31,000	319,000	22,785
Newcastle	£35,800	809,000	73,545
North Tyneside	£33,000	206,000	34,333
South Tyneside	£31,800	150,000	30,000
Sunderland	£32,600	277,750	69,437
Gateshead	£30,600	202,500	25,312
County Durham	£30,300	527,000	35,133
Hartlepool	£30,300	291,000	145,500
Stockton on Tees	£34,900	197,000	39,400
Middlesbrough	£30,700	140,000	46,667
Redcar & Cleveland	£30,400	137,000	27,400
Darlington	£33,000	106,000	26,500

Appendix 19

Link between the research aims & objectives, the literature review and the research questions for the main research

Research aims & objectives		Literature review link	Research questions	
1 A	What, if any, are the growth drivers of picture framing businesses in the North East? What's their background? Experience, training, education. Is this important?	Kirkwood (2016) ElKhouly and Marwan, 2015 Jafari-Sadeghi (2020) Atkinson et al (2017) Thébaud (2015) Clark & Douglas (2014) Gerrish, Leader & Crocker (2010) Braidford, Stone & Tesfaye (2013) Vieira *et al. (*2020) Outsios and Farooqi (2017) Samuel Baixauli-Soler, Belda-Ruiz and Sánchez-Marín (2021) Robichaud et al (2019) Irwin & Scott (2010) Monnickendam-Givon, Schwartz and Gidron (2016) Mitra & Basit (2021) Reuschke, Mason and Syrett (2021)	1	Are you*?* Male Female
		Cressy (1996) Mattare, Monahan and Shah (2010) ElKhouly and Marwan (2015) Reuschke, Mason and Syrett (2021)	2	What age bracket do you fall into?
		Cooper et al (1989) Barringer et al (2005) Lofstorm et al (2014) Virglerova *et al.* (2017) Cassar, 2006 Coad et al (2013) Ahadi & Kasraie (2020) Makhele & Barnard (2020) Richbell et al (2006) Irwin & Scott (2010) Foroudi *et al* (2017)	3	What is your highest level of qualification?

B	How long have they been trading?	Akinboye, Collins and Morrish (2020) (Squicciarini, 2017) Jung, Peña and Arias (2012) Moen et al (2016) Yazdanfar & Ohman (2015) Clark & Douglas (2010) Williams (2017) Makropoulos et al (2020) Yli-Renko et al's (2020) Pickernell et al (2013)	4 a	How many years have you been in business with the current venture? Did you? Set up this business Inherit this business Buy this business
C d	What is their motivation? Do they plan to expand? If not, why?	Peren (1999) Morrison et al (2003) Douglas (2013) Ahmad & Arif (2014) Mattare, Monahan and Shah (2010) Laguir & Beston (2016) Clark & Douglas (2010) Jafari-Sadeghi (2020) Thébaud (2015) Clark & Douglas (2014) Gerrish, Leader & Crocker (2010) Reijonen & Kompulla, 2007 Davidsson (1991) Gray (2002) Matlay (2004) Wang et al (2011) Anwar & Daniel (2016)	5 a	What was the motivation for setting your framing business up? Has your motivation for running the business changed in any way? If so, to what and why?
		Peren (1999) Morrison et al (2003) Cooper et al (1989) Barringer et al (2005) Lofstorm et al (2014) Rosa & Scott (1999) Cassar (2006) Simić, Slavković and Aleksić (2020) Mattare, Monahan and Shah (2010) Laguir & Beston (2016) Shaw and Sørensen (2019) Dias & Martens (2017)	b c d	Did you have any experience of the picture framing industry before setting up your own business? Have you owned a business or businesses before this one? If you had experience of business, has this experience helped with operating your current picture framing business?

		Thatcher et al (2016) Lafuente et al (2019) Peck, Jackson and Mulvey (2018) Betton et al (2019) Richbell et al (2006)		
		Moreno-Menéndez and Casillas (2021) Zhou and van der Zwan (2019) Cassar (2006) Brown and Mawson (2013) Clark & Douglas (2010) Clark & Douglas (2014) Thébaud (2015) De Souza and Seifert (2018) Greenbank (2001) Weber et al (2015) Casser (2007) Davidsson (1989) Fielden et al (2000) Poutziouris (2003) Wiklund et al (2003) Walker & Brown (2004) Hogarth-Scott et al. (1996) Fielden et al (2000) Davidsson (1991) Soloman & Mathias (2020) Braidford et al (2017) Duarte Alonso and Bressan (2014) Hänninen *et al. (*2017) Brush et al (2009) Baines & Wheelock (1998) Chell & Baines (2000)	e	Do you want to grow the business in any way?
		Braidford et al (2017) Ahadi & Kasraie (2020) Atkinson et al (2017) McPherson (2019) Hogarth-Scott et al. (1996) Fielden et al (2000) Davidsson (1991) Hamelin (2013) Lutz, Klemp & Gerhard (2010) Gill & Bigger (2012) Lee (2014)	f	Did you encounter any barriers when you were setting up or running the business?

		Clegg (2018) Thompson et al (2013) Usai et al (2018) Vargas-Hernández and Arreola-Enríquez (2017) Faherty and Stephens, 2016 Hall & Raffaele (2013) López-Ortega et al. (2016) Betton et al (2019) Harrison and Baldock (2015) Rostamkalaei (2017) Cowling, Liu & Zhang (2016) Wang, Han and Huang (2020) Suryani (2018) Lee & Xu (2020) Pickernell et al (2013) Burgess et al (2015) Barba-Sanchez et al (2019)		
		Prasastyoga et al (2018) Coad et al (2013) Eklund (2020) Ahadi & Kasraie (2020) Simić, Slavković and Aleksić (2020) Watson et al (1998) Moran (1998) Yazdanfar (2013) Johnson et al (1999) Ekinci et al (2020) Tomasella & Ali (2019) Laguir & Beston (2016) Kidney, Harne and O'Gorman (2017) McPherson (2019) Haq et al (2021) Khurana et al. (2020) Vrontis *et al.* (2020) Alonso et al (2019) Crespo et al. (2020) Garcia Martinez et al (2019) Weaven et al (2021) Maté-Sánchez-Val, López-Hernandez and Rodriguez Fuentes (2018) Yli-Renko et al (2020)	13	What do you feel are the most important factors to your success to date as an entrepreneur?

		Khosla (2012) Byun *et al.* (2020)		
2 a b c d	Do North Eastern picture framing businesses carry out any strategic business planning to help growth/survival? When is planning, if any, undertaken? Has the planning been effective? What tools are used? As many picture framing businesses have both a retail and manufacturing element, have the changes in the retail sector had any impact on the business?	ElKhouly & Marwan (2017) Williams (2017) Sandada (2015) Elbana, (2008) Jorosi, (2008) Mazzarol et al., (2009) Bellamy *et al.*, (2019) Forth & Bryson (2019) Fatoki (2016) Faherty and Stephens (2016) Greenbank (2000a) O'Dwyer & Ryan (2000) LeBrasseur et al (2003) Muller et al (2012) Richbell et al (2006) Wang et al (2011) Whittington (2020) Mintzberg (1984) Hauser et al (2020) Crovini, Ossola and Britzelmaier (2021) Bianchi et al (2018) Honig & Samuelsson (2021) Katz (2018) Li (2017) Baden-Fuller & Morgan (2010) Pucihar *et al. (*2019) Latifah et al (2021) Cosenz & Bivona (2019) Fletcher et al (2016) Smith (1999) Barbero et al (2011) Barba-Sanchez et al (2019)	8 a	Have you seen a change in the type of work that you typically frame since setting up? If changes have occurred, has this affected the way that you plan for the future?
		Bianchi et al. (2018) Hertati et al. (2020) Usai et al (2018) Crovini, Ossola and Britzelmaier (2021)	9	Have the events of the last 3 years had an impact on your business (Covid 19, Brexit, War), either negative or positive?
		See 8a & b for links	b	Have these events changed the way that you carry out strategic planning?
3	What business support have business owners found in the North East which could aid	Morrison et al (2003) Ahadi & Kasraie (2020)	6 a	What made you set your framing business up in this area of the North East?

a b c d	framing businesses growth/survival? Have the MSMEs used any form of business support in the past? What form of support did it take and was it useful? Do they plan to seek any support in future? Did any of these factors have an impact on the location of their business?			Did you consider any other areas?
		Fletcher et al (2016) Reuschke and Houston (2016) Ledwith (2020)	b	What were the most important factors when considering the location of your business?
		Thorgren & Williams (2020)	9a	Did you receive any financial help from the government?
		Virglerova *et al.* (2017) Lean (1998) Fielden et al (2000) Devins et al (2005) O'Dwyer & Ryan (2000) Greenbank (2000b) Mole (2000) Laukkanen and Tornikoski (2018) Thorgren & Williams (2020) Robson & Bennett (2000) Ekinci, Gordon-Wilson and Slade (2020) Matlay (2004) Faherty and Stephens (2016) Bouette and Magee (2015) Jones and Parry (2011) Braidford, Stone & Tesfaye (2013) Thorgren & Williams (2020) Criscuolo, Gal and Menon (2017) Jha & Depoo (2017) Caliendo, Künn and Weissenberger (2020) Cowling et al. (2020) Einiö and Overman (2020) García Vidal et al. (2017) Gray & Jones (2016) Al-Awlaqi, Aamer and Habtoor (2018) Fiorentino (2017) Cowling et al (2018) Baldock & Mason (2015) Demirel and Danisman (2019)	10	Have you sought any support from business support agencies which may have aided business growth or survival?

		Alperovych, Groh and Quas (2020) Banai *et al.* (2020) Arrieta-Paredes, Hallsworth and Coca-Stefaniak (2020)		
4 a b	How have picture framers been able to source finance to both set up and grow their business? How did they finance their set up and growth? Has finance limited their growth potential in any way?	Okpara & Winn (2007) Williams (2016) Caliendo, Künn and Weissenberger (2020) Cowling et al. (2020) Einiö and Overman (2020) García Vidal et al. (2017) Bellamy (2019) Cressy (1996) Cowling et al (2016) Imarhiagbe, Saridakis and Mohammed (2017) Harrison and Baldock (2015) Rostamkalaei (2017) Cowling, Liu & Zhang (2016) Zubair, Kabir and Huang (2020) van der Zwan (2016) Kang et al (2019) Öhman and Yazdanfar (2017) Martínez-Sola, García-Teruel and Martínez-Solano (2018) Masiak *et al.* (2019) Knewtson & Qi (2019) Mkhaiber & Werner (2020) Wang, Han and Huang (2020) Suryani (2018) Kijkasiwat et al. (2021) Meslier, Sauviat and Yuan (2020) Lee & Xu (2020) Brown & Lee (2019) Rostamkalaei and Freel (2016) Dwyer and Kotey (2015) Pickernell et al (2013) Al-Najjar & Al Najjar (2017) Brown et al (2018) Vieira *et al. (*2020)	7 a	When you first started the picture framing business, how did you finance it? How have you financed the continued running of the business and/or its growth?

		Outsios and Farooqi (2017) Samuel Baixauli-Soler, Belda-Ruiz and Sánchez-Marín (2021) Robichaud et al (2019) Irwin & Scott (2010) Chen and Phillips (2016) Cowling et al (2018) Martín-García and Morán Santor (2021) Caselli et al (2019) Lin *et al.* (2020) Moro et al (2020) Dalton, Nhung and Rüschenpöhler (2020) La Rocca *et al.* (2019) Van Hoang *et al.* (2018) Arrieta-Paredes et al (2019) Eggers (2020) van der Schans (2015) Chen and Phillips (2016) Dahal & Fiala (2019) McHugh, Baker & Donaldson (2019) Mkhaiber & Werner (2020) Howell (2019) Howell and Ndukwe (2020) Leung and Ostrovsky (2018) Klein et al. (2019) Eldridge et al (2021) Olufolaji and Phillips (2015) Kgoroeadira, Burke and van Stel (2019) Pengnate and Riggins (2020) Stevenson et al (2018) Klein et al (2019) Mochkabadi and Volkmann (2020) Levratto et al (2018) Poposka, Nanevski and Mihajlovska (2016) Wong et al (2018) Owen, Deakins & Savic (2019) Ughetto, Cowling and Lee (2019)		

		Thorgren & Williams (2020) Cathcart et al (2020) Horvath & Lang (2020) Srhoj, Škrinjarić and Radas (2021) Thorgren & Williams (2020)	9 a	Have the events of the last 3 years had an impact on your business (Covid 19, Brexit, War), either negative or positive? Did you receive any financial help from the government?
5 a b	Is the picture framing trade innovative? Do framers and/or suppliers consider themselves to be cutting edge? Why? Do framers take advantage of aspects such as conservation or Forestry Stewardship Council (FSC) membership by suppliers in their advertising or sales pitch?	Clark & Douglas (2014) Vrontis *et al.* (2020) Ballestar et al (2019) ElKhouly and Marwan (2015) Hänninen *et al.*, 2017) Huggins (2011) Nunes et al (2013) Peneder and Woerter (2014) Crespo et al. (2020) Peck, Jackson and Mulvey (2018) Dabic et al. (2020) Harel et al (2019) Attree, McMullen and Kleinschafer (2018) Zahoor and Al-Tabbaa (2020) Smallbone et al (1995) Tormo & Storhammar (2019) Hervas-Oliver et al (2021) Nair (2020) Lorente-Martinez et al (2020) Grama-Vigouroux *et al. (*2020) Papadopoulos et al (2020) Thompson, Williams & Thomas (2013) D'Amore and Iorio (2017) Pantano *et al.* (2020) Herve, Schmitt & Baldegger (2020)	12	Has technology had a major impact on the way you carry out your business functions?
		North, Aramburu and Lorenzo, 2019)	a	Do you feel that advances in production methods such as that in conservation framing techniques have helped to grow your business?

6 a b	Do picture framers in the North East network to aid growth and/or develop skills? Are they active members of FATG or any other online forum? What's their reasoning for this? Do they work with other similar/different businesses to develop concepts?	Ahadi & Kasraie (2020) Duarte Alonso and Bressan (2014) Vrontis *et al.* (2020) Huggins (2011) Byun *et al.* (2020) Baines & Robson (2001) Stankovska et al (2016) Olanrewaju *et al.* (2020) Willetts, Atkins and Stanier's (2020) Donckels & Lambrecht (1995) Baines & Wheelock (1998) Chell & Baines (2000) Monnickendam-Givon, Schwartz and Gidron (2016) Mitra & Basit (2021) Stankovska et al (2016) Foster & Brindley (2018) Outsios and Farooqi (2017) Hallam, Dorantes Dosamantes and Zanella (2018) Zolin et al (2016) Roper (1997) Roper & Hewitt-Dundas (2017) Tóth, Nieroda and Koles (2020) Chaston (2000) Bai et al (2019) Karayanni (2015) Santoro et al (2020) Kijkasiwat et al (2021) Senaratne and Wang (2018) Salder et al (2020) Song, Yang and Yu (2020) Dossou-Yovo & Keen (2021) Scuotto et al (2017) Vătămănescu et al (2020) Evans and Bosua (2017)	11	Do you use networking in any way to help build your business?

		Forsman & Temel (2016) Albats et al (2020) Benhayoun et al (2020) Garousi Mokhtarzadeh *et al* (2020) Duarte Alonso and Bressan (2014) Leckel et al (2020) Huber, Wainwright and Rentocchini (2020) Moraes et al (2020) Tajeddini et al (2020) Pažitka and Wójcik (2019) Hogarth-Scott et al (1996) Greenbank (2000a) Patel et al (2021) Alford & Page (2015) Camilleri (2019) Larner et al (2017) Townsend et al (2016) Reuschke and Mason (2020) Gamble et al (2019) Palmer-Abbs, Cottrill and Farrington (2021) Anderson, Wallace and Townsend (2016) Doherty, Carcary and Conway (2015) Reuschke, Mason and Syrett (2021) Tajvidi and Karami (2021) Abreu & Picchiai (2019) Hosio et al (2018) Wilf (2020) McGowan (2020)		