



# **WP1 Analysis of Needs Report**

**February 2010**

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## 1. Introduction and Methodology

The objective of WP1 was to carry out a detailed analysis of the training needs from the companies producing and selling children's fashion articles. The analysis was undertaken through a combination of quantitative tools (survey) and qualitative ones (in-depth interviews). The analysis was done in the countries represented by CFE (Spain, Portugal and France), in the countries of the participating Associations (Greece and Italy), as well as in Finland and Sweden, which are involved in the project.

The tasks were performed by a team integrated by persons of the different partners, especially the Associations of companies, and the result cover different aspects: the needs of the companies to manage the brands, the professional profile of the brand manager, and the training needs to reach it.

In a nutshell, the tasks undertaken were:

- Definition of the analysis framework and tools: elaboration of the questionnaires, the guide for the interviews, the sample for the survey, the persons to be interviewed, etc.
- Application of the in-depth interviews to 10 companies.
- Analysis (qualitative and quantitative) of the information and development of an on-line survey.
- Application of the survey in the different countries through the [www.brandfashionmanager.eu](http://www.brandfashionmanager.eu) site.
- Data handling and processing, obtaining the relevant statistical information.
- Report preparation and presentation of the results during a Workshop held in Greece.

The following table presents the intermediate actions undertaken together with the actual dates and the responsible partners.

Action	Final Date	Responsible
Distribution to partners of initial questionnaire to be used as a roadmap for the face to face interviews	27/10/2009	HCIA
Comments from partners	2/11/2009	ALL
Final Questionnaire	3/11/2009	HCIA
Collection of questionnaires from at least 2 companies per region	30/11/2009	ALL
Analysis of responses and preparation of new questionnaire for collection of data regarding the training needs. Distribution of new questionnaire to partners	18/12/2009	HCIA
Collection of information regarding training courses offered in every region	18/12/2009	ALL
Comments on new questionnaire	15/1/2010	ALL
Setting up of an electronic system for the collection of responses	15/1/2010	CFE / S2
Collection of responses – closing date	22/2/2010	ALL
Analysis of responses / Reporting	26/2/2010	HCIA
Presentation of WP1 during workshop in Athens	4-5/3/2010	ALL

### 1.1. Approach for in-depth interviews

The partners agreed during the project's kick off meeting to prepare a questionnaire that was used for information elicitation from brand managers of companies in the children fashion sector.

A partner from each country represented in the consortium collected at least two questionnaires following an in-depth interview with the people responsible for the branding of the children products.

Finally, 12 questionnaires were completed and analysed by HCIA. The responses were from the following countries:

Greece	2
Spain	2
Italy	2
Portugal	1
Sweden	2
Finland	3

### 1.2. Approach for the survey

Using the results obtained by the in-depth interviews, a new detailed questionnaire was developed by HCIA and agreed by all partners. The new questionnaire was structured using mainly check-boxes in order to be easily completed electronically and the electronic version of the survey questionnaire was uploaded to [www.brandfashionmanager.eu](http://www.brandfashionmanager.eu) and was open to the public for a period of approximately one month.

Each partner contacted as many companies producing children fashion as possible in order to persuade them to use the electronic system in order to provide their responses. Overall, 40 responses were collected, and HCIA analysed them and presented the results during a Workshop held in Athens on 4 and 5 March 2010. The following table presents the countries of the companies which replied to the on-line questionnaire (one company did not report its name or country of origin).

Greece	8
Spain	7
Italy	8
Portugal	4
Sweden	2
Finland	5
France	5
Unknown	1

This report demonstrates the main results obtained from both the in-depth interviews and the on-line survey.

## 2. In-depth interviews

### 2.1. A. Company Profile - Branding activities

The in-depth interviews were done in 12 companies in 6 countries.

Overall the 12 companies employed approximately 500 individuals, 80% of which are women. The size of companies varied considerably from 4 employees in Finland, to 174 employees in Greece (mean size was 41,5 employees per company). The mean age value of the employees was 37,93 years. The small companies in size are located in the north countries (Sweden and Finland), with less than 19 employees per company.

It is notable that more than 95% of the employees were full-time employees and only one company in Italy clearly mentioned that there are 33 individuals working as externals, while it has only 6 permanent employees.

The following table presents the education / training level of the employees from 11 companies, indicating that only a small percentage of the employees are University graduates or hold a higher degree.

Education / Training level of employees:	Total	Number of companies
- Post graduate education (e.g. Master / PhD)	13	4
- Graduate education (University degree)	41	10
- Secondary education (e.g. high-school, secondary school, or gymnasium)	110	10
- Vocational education / Training	75	8
- Other	54	4

As far as the distribution channels that the companies use, 6 respondents sell more than 90% of their products wholesale, while only 4 respondents have considerable sales through their own shops (one company uses franchise shops). In addition, one company uses agents to sell its products and only one company mentioned that it sells on-line. Most respondents cover their local market, except one respondent from Portugal which sells mainly abroad.

As far as promotional channels are concerned, there appears to be a clear emphasis on the use of Internet, while at the same time points of sale are also widely used together with informational brochures. On the other side, more traditional channels, such as: TV, news / newspapers, magazines and fashion media are not used.

Which of the following promotional channels do you use for the promotion of your products? (1: a little – 5: a lot)	1	2	3	4	5	Responses	Mean
1. Internet	0	0	4	5	2	11	3,82
2. At points of sale	0	2	2	3	3	10	3,70
3. Informational brochures / newsletters	0	1	5	2	2	10	3,50
4. Family / friends	1	3	1	2	2	9	3,11
5. Articles in magazines	3	2	1	4	0	10	2,60
6. Advertisement in the fashion media	1	3	5	0	0	9	2,44
7. News / newspapers	5	2	1	1	0	9	1,78

8. TV	6	2	0	0	0	8	1,25
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The most common and important competitive advantages that the companies use to highlight their products are: quality, fit and value for money. On the other hand, it seems that they don't promote product innovation.

Which competitive advantage do you highlight when branding your products? (1: a little – 5: a lot)	1	2	3	4	5	Responses	Mean
1. Quality	0	0	0	2	9	11	4,82
2. Fit	0	1	0	4	6	11	4,36
3. Innovation	1	1	3	2	2	9	3,33
4. Value for money	0	0	2	4	5	11	4,27
5. Vision	0	1	0	5	3	9	4,11
6. Fashion	0	1	1	5	4	11	4,09
7. Services to the consumers	0	1	1	6	4	12	4,08

It is the belief of the majority of the respondents that the customers are buying their products mainly due to high quality and previous good buying experience, followed by the known brand. On the other hand, it is clear that they don't view sales / offers as criterion influencing the potential customer.

What criteria do you believe that your customers use when they purchase your products? (1: a little – 5: a lot)	1	2	3	4	5	Responses	Mean
1. Quality	0	0	0	3	9	12	4,75
2. Previous good buying experience	0	0	0	4	8	12	4,67
3. Known brand	0	0	3	2	6	11	4,27
4. Price	0	0	5	3	3	11	3,82
5. Innovation	1	2	3	2	1	9	3,00
6. Production company	2	1	3	1	2	9	3,00
7. Sales / offers	2	5	2	1	0	10	2,20

## 2.2. B. Personal Details

Most respondents are under 40 years old. Their education level varies considerably as the following table demonstrates:

Educational level	Responses
- Post graduate education (e.g. Master / PhD)	3
- Graduate education (University degree)	4
- Secondary education (e.g. high-school, secondary school, or gymnasium)	5
- Vocational education / Training	0
- Other	0

The educational background of the responses varies considerably, but most respondents claimed higher degrees related to Business Management and Communication / Advertisement. Only two respondents had more technical degrees in Environmental studies and Chemical engineering.

As far as foreign languages are concerned, all respondents claim to use English fluently, 8 respondents have some knowledge of German, and 5 respondents have some knowledge of French.

Finally, as far as computer skills are concerned, all respondents extensively use Word, Excel and the Internet, while are a bit less familiar with Power Point. In addition, 3 respondents have extensive knowledge of some design / drawing software tool, e.g. Photo Shop or Corel.

### 2.3. C. Professional Career

Most respondents have quite a few years of working experience. Half of the respondents have more than 10 years work experience, while 3 have between 6 to 10 years.

Their previous work experience varies considerably, but most work was related to product marketing, advertisement, and sales.

The following table shows the number of years the respondents have been employed in the company:

Years employed in this company:	Responses
- 0 - 1 year	3
- 2 - 5 years	2
- 6 - 10 years	3
- >10 years	4

The experience of the respondents in the specific position is equally distributed in the four different ranges, as the following table demonstrates.

Years in this specific position:	Responses
- 0 - 1 year	3
- 2 - 5 years	3
- 6 - 10 years	3
- >10 years	3

Most respondents (50%) claimed that their duties fit well their specialities, while 4 respondents claimed that they need further training in order to better correspond in their duties, and 3 respondents claimed that they have the specialities to correspond to more demanding duties.

As far as main activities undertaken in the day to day activities of the respondents, the following table presents the number of responses in a descending order, showing the activities that most respondents claim, followed by another table showing in descending order the activities based on the mean time spent on each activity.

Common activities	Responses
1. Marketing	6
2. Sales	5
3. PR - advertising - press - promotional activities	5
4. Communication with clients / customer support & handling complaints	5
5. Product Development / collections	4

6. Coordination (retail team, designers, management, etc)	4
7. Financial (budget, invoices, etc)	3
8. IT / Web	3
9. Design	3
10. Organise events (fairs, exhibitions, clubs, etc)	3
11. Communication	2
12. Improve the organisation / competition & consumer research	2
13. Administration	2
14. Communication with suppliers	2
15. Problem solving	1
16. Visiting own shops and competitors stores	1
17. Travel	1
18. New projects	1
19. Improve work knowledge	1
20. Photography / preparing product catalogues	1
21. Packaging	1
22. Company identity	1
23. Exports	1

Common activities	Responses	Mean value
1. Communication	2	32,5
2. Administration	2	30,0
3. Photography / preparing product catalogues	1	30,0
4. Exports	1	30,0
5. Product Development / collections	4	26,3
6. Sales	5	25,0
7. PR - advertising - press - promotional activities	5	23,0
8. Coordination (retail team, designers, management, etc)	4	21,8
9. Marketing	6	21,7
10. Financial (budget, invoices, etc)	3	20,0
11. Design	3	20,0
12. Improve work knowledge	1	20,0
13. Travel	1	20,0
14. Packaging	1	20,0
15. Communication with clients / customer support & handling complaints	5	19,0
16. Organise events (fairs, exhibitions, clubs, etc)	3	12,7
17. Communication with suppliers	2	12,5
18. Improve the organisation / competition & consumer research	2	12,5
19. IT / Web	3	10,0
20. Company identity	1	10,0
21. New projects	1	10,0
22. Problem solving	1	10,0
23. Visiting own shops and competitors stores	1	5,0

From the tables above it is clear that some activities, such as marketing, communication with clients, organization of events, and IT/Web, despite the fact that

they appear in a large number of cases, the mean time spent on these is much less than other activities, such as communication, administration, exports and preparing catalogues, which appear less frequently.

The most important difficulties that the respondents face at work are the following in descending order.

Difficulty	Responses
1. Lack of human resources	3
2. Government services / legislation / taxation etc.	2
3. Managing photo shoots	1
4. Organise work with the hole team	1
5. Lack of market information	1
6. Lack of marketing knowledge	1
7. Improve work knowledge	1
8. Marketing activities	1
9. Credit recovery	1
10. Finding agents	1
11. Production problems / delays	1

The respondents were also asked to provide input on the characteristics regarding the knowledge, capabilities and behaviour that is required for their position. The main responses are presented in the table below:

- KNOWLEDGE: The necessary theoretical knowledge for the successful implementation of the job (e.g. logistics, foreign languages, etc.)	<ol style="list-style-type: none"> <li>1. Accounting / financial knowledge</li> <li>2. Business management degree</li> <li>3. Foreign languages</li> <li>4. IT</li> <li>5. Marketing knowledge in retail &amp; fashion market</li> <li>6. Advertising / press communication</li> <li>7. Design</li> <li>8. Commercial background</li> <li>9. Technical product knowledge</li> </ol>
- CAPABILITIES: The practical requirements of a job position (e.g. oral expression, use of equipment, public presentation, team management)	<ol style="list-style-type: none"> <li>1. Negotiation skills</li> <li>2. Inter-personal relations</li> <li>3. Flexibility</li> <li>4. Work under pressure</li> <li>5. Oral expression</li> <li>6. Team management</li> <li>7. Team working</li> <li>8. Determination</li> <li>9. Analytical mind</li> <li>10. Previous experience on commercial, design and production fields</li> <li>11. Computer skills</li> </ol>
- BEHAVIOUR: The professional behaviour that the position requires (e.g. team spirit, understanding, positive attitude towards the customer)	<ol style="list-style-type: none"> <li>1. Team spirit</li> <li>2. Cooperation</li> <li>3. Proactiveness</li> <li>4. Consistency</li> <li>5. Adaptability</li> <li>6. Communicative</li> <li>7. Well-organised</li> </ol>

	<ul style="list-style-type: none"> <li>8. Fair-minded, understanding, easy going</li> <li>9. Creative</li> <li>10. Positive attitude towards the customer</li> <li>11. Open minded to new cultures and influences</li> <li>12. Aware of the socioeconomic environment</li> </ul>
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The following table presents the number of responses regarding the interaction / cooperation that they have internally and externally in the company. From the results there appears to be clear interaction with the design department internally and externally with the company's suppliers and customers.

Internal	Responses
1. Design	4
2. Other managers	2
3. Commercial manager	2
4. Computer department	2
5. Sales manager	2
6. Employees	2
7. General manager	1
8. Technical manager	1
9. Logistics	1
10. Retail	1
11. Production manager	1
12. Purchasing	1
13. Tailoring	1
14. Directors	1
15. Employers	1
16. Accounting	1

External	Responses
1. Suppliers	9
2. Customers	4
3. Design	3
4. Advertisement agencies	3
5. Subcontractors	3
6. IT/Web consultants	2
7. Print suppliers	2
8. Agents	2
9. Franchise / shops	2
10. Photographers	1
11. Headquarters	1
12. Press agencies	1

Moreover, the responses on which activities, the respondents have a final decision are presented below in descending order.

Final decision	Responses
1. Marketing	5
2. All branding	4
3. Strategy	3
4. Management of own brands	2

5. IT purchasing	1
6. Production results	1
7. Collection	1

Most respondents had in the past received training on marketing and IT, as the following table demonstrates.

Prior professional training themes	Responses
1. Marketing design	4
2. IT	3
3. Management	2
4. Financing	2
5. Commercial techniques	1
6. International trade in Internet	1
7. Retail	1
8. Communication	1
9. Human Resources	1
10. Time management	1
11. Sales forecast	1
12. Exports	1
13. Organisation	1
14. Customer care / marketing	1

In addition, the respondents claim that there is a greater need for further training in marketing and retail.

Further professional training themes	Responses
1. Marketing	4
2. Retail	2
3. Programming	1
4. Photography	1
5. Motivation techniques	1
6. Languages	1
7. Leadership	1
8. Design	1

### 3. Survey results

The questionnaire that was developed based on the results obtained from the in-depth interviews was designed in such a way in order to be easily uploaded in order for companies to have the ability to easily fill it in. The questionnaire, which is included in the Appendices, was placed on the Web on the project's Web site [www.brandfashionmanager.eu](http://www.brandfashionmanager.eu). Overall, 40 companies completed the questionnaire and the following paragraphs present the results obtained from the on-line survey.

#### 3.1. A. Personal Details

Most respondents were under 45 years old, and the following table presents the age distribution.

Age range:	Responses
<25	0
25-35	10
35-45	18
45-55	7
>55	2
<b>Total</b>	<b>37</b>

It is worth noting that about 75% of the respondents hold a University degree and/or a post graduate degree.

Degree level:	Responses
• Post graduate education (e.g. Master / PhD)	11
• Graduate education (University degree)	16
• Secondary education (e.g. high-school, secondary school, or gymnasium)	11
• Vocational education / Training	1
• Other	1
<b>Total</b>	<b>40</b>

English appears to be the most common language that the respondents feel comfortable with, followed by French and German.

	1: Good	2: Average	3: None
▪ English	32	6	2
▪ French	11	10	19
▪ German	3	8	29
▪ Other language:	8	11	21

Finally, as far as computer skills are concerned Word and Internet are common practice by the respondents followed by Excel and Power Point. It is also worth noting that 5 respondents work fluently with a drawing package and 14 more have some average understanding of a drawing package.

	1: Good	2: Average	3: None
▪ Word	33	7	
▪ Excel	26	11	3

▪ Power Point	22	7	11
▪ Access	4	16	20
▪ Internet	32	7	1
▪ Drawing packages e.g. Corel	3	14	23
▪ Other	6	12	22

### 3.2. B. Professional Career

Most respondents (more than 75%) have been working in the company for more than 6 years, making them quite knowledgeable about the prevailing situation in their companies.

Years employed in this company:	Responses
0 - 1 year	0
2 - 5 years	7
6 - 10 years	6
>10 years	24
<b>Total</b>	<b>37</b>

Moreover, a large majority has been in the same position for more than 2 years, indicating their better understanding of the specific tasks associated with their position.

Years in this specific position:	Responses
0 - 1 year	3
2 - 5 years	14
6 - 10 years	8
>10 years	12
<b>Total</b>	<b>37</b>

The following table presents the main topics that the respondents have had some educational / training background. The list is in descending order demonstrating that the main areas are marketing and business studies, while very few had a more technical background.

Educational / training background:	Responses
1. Marketing	22
2. Business studies	21
3. Management	13
4. Economics / Financial studies	11
5. Communication studies	8
6. Technological studies (e.g. IT)	6
7. Engineering	2
8. Other	10

As far as their professional background is concerned, the main work for more than half of the respondents is related to marketing and sales, followed by product development, PR and advertising.

Professional background:	Responses
1. Marketing / sales	27
2. Product development	12
3. Public Relations	11

4. Advertising	10
5. Design	8
6. Human Resources	5
7. IT / Web	3
8. Other	7

The following table presents in descending order the time allocated to specific tasks, including the responses, which had more than 1% in each activity. Overall, most respondents and most of their time is allocated to sales and marketing, followed by internal coordination, communication with suppliers and marketing activities.

Activities	Responses	Mean Time
1. Sales & promotion	33	18,15
2. Coordination with internal team (designers, management, sales, etc.)	29	14,31
3. Marketing	31	12,58
4. Communication with suppliers	25	12,52
5. Financial issues (budgeting / invoices etc.)	26	12,00
6. Product development	26	10,73
7. Public relations – advertising – press relation – communication	30	10,63
8. Company strategy – competition and consumer research	29	9,62
9. Product Design	20	8,10
10. Information technology / Web support	20	7,20
11. Organisation of events / preparation of catalogues / photography	23	7,04
12. Other	15	8,40

The following table presents the main difficulties that the respondents face in descending order, demonstrating that the lack of market information and the lack of human resources are the main problems.

Please report work difficulties that you face (1: minor– 5: major difficulty)	1	2	3	4	5	Responses	Mean
1. Lack of market information	4	13	6	6	8	37	3,03
2. Lack of human resources	9	2	14	4	8	37	3,00
3. Credit recovery	13	3	6	9	6	37	2,78
4. Work organisation	4	11	15	4	3	37	2,76
5. Marketing activities	9	6	14	6	2	37	2,62
6. Managing promotional events / photo shoots etc.	11	9	9	5	3	37	2,46
7. Lack of marketing knowledge	9	13	9	6	0	37	2,32
8. Other	13	5	10	5	3	36	2,44

The following 3 tables present in descending order the importance that the respondents place on the required capabilities that are necessary for a branding manager. It is worth

noting that overall they place higher importance to specific capabilities and behaviour patterns, rather than prevailing knowledge. This means that the personality of the brand manager is more important rather than his/her background knowledge.

Knowledge	Mean values
1. Marketing knowledge in retail & fashion market	4,05
2. Foreign languages	3,70
3. Commercial background	3,68
4. Technical product knowledge	3,62
5. Design	3,57
6. Advertising / press communication	3,49
7. Business management degree	3,38
8. IT	3,06
9. Accounting / financial knowledge	3,03
10. Other	2,39

Capabilities	Mean values
1. Inter-personal relations	4,32
2. Team working	4,27
3. Team management	4,22
4. Oral expression	4,16
5. Determination	4,14
6. Flexibility	4,11
7. Negotiation skills	4,03
8. Work under pressure	3,95
9. Analytical mind	3,76
10. Previous experience on commercial, design and production fields	3,49
11. Computer skills	3,27
12. Other	2,33

Behaviour	Mean values
1. Communicative	4,30
2. Positive attitude towards the customer	4,22
3. Cooperation	4,14
4. Well-organised	4,11
5. Team spirit	4,05
6. Proactiveness	4,03
7. Adaptability	4,00
8. Open minded to new cultures and influences	3,97
9. Creative	3,89
10. Aware of the socioeconomic environment	3,81
11. Fair-minded, understanding, easy going	3,78
12. Consistency	3,73
13. Other	2,42

The following table presents the number of responses regarding the interaction / cooperation that they have internally and externally in the company. From the results there appears to be clear interaction with the design department, the production manager and the financial department internally and externally with the company's suppliers and customers.

Internal	Responses
1. Design department	31
2. Production manager	28
3. Finance department	26
4. Commercial manager	24
5. Logistics	23
6. Sales manager	23
7. General manager	22
8. Retail	19
9. Technical manager	18
10. Purchasing	18
11. Computer department	14
12. Tailoring	11
13. Other	10

External	Responses
1. Customers (e.g. shops)	31
2. Suppliers	27
3. Agents	20
4. Consumers	15
5. Photographers	14
6. Advertising agencies	14
7. Press agencies	13
8. IT/Web consultants	12
9. External Designers	12
10. Print suppliers	10
11. Headquarters	4
12. Other	9

### 3.3. C. Professional Training

The following table presents the training needs that the respondents claimed are necessary for their position. It is clear that emphasis is given to customer care / marketing, communication, management and commercial techniques.

Training needs	Mean value
1. Customer care / marketing	3,88
2. Communication	3,76
3. Management	3,71
4. Commercial techniques	3,62
5. Time management	3,50
6. Languages	3,50
7. Sales forecast	3,44
8. Retail	3,41
9. Organisation	3,41
10. International trade in Internet	3,35
11. Motivation techniques	3,29
12. Marketing design	3,15
13. Human Resources	3,12

14. Financing	2,97
15. IT	2,82
16. Other	2,38

Finally, the following tables present the reasons for participating or not in training.

Reasons for participating in training	Responses
1. Upgrade of qualifications	25
2. Exploitation personal skills and capabilities	21
3. Introduction of new technologies in the company	15
4. Maintaining current job	12
5. Support professional career	11
6. Better opportunities for new job in case of redundancy	9
7. Provision of motives from the company	8
8. Other	8

Reasons for not participating in training	Responses
1. Limited time	29
2. Learning difficulties	3
3. Current job does not have any particular requirements	2
4. In my current situation, training is not considered essential	1
5. Other	6

### 3.4. D. Branding activities

From 34 overall responses it is evident that the overwhelming majority of employees in the companies are women (around 78%). The following table shows the total number of employees and the mean value per company.

	Number of employees	Mean value
Men	291	8,56
Women	1050	30,88
<b>Total</b>	<b>1341</b>	

It is worth noting that there was a mixture of company sizes in every country having very small businesses with less than 10 employees to larger companies with 50 or more employees. The largest company was in France (240 employees), while all the Portuguese companies had a medium size (between 35 to 70 employees).

Most companies (out of 32 responses) are selling their products wholesale (only one of the respondents did not sell at all wholesale, while 7 companies only sell wholesale). In addition only half sell through their own shops and only 8 companies sell on-line.

Distribution Channel	Responses with >0%	% of sales
1. Wholesale	31	73,06
2. Own shops	16	27,00

3. On-line	8	10,17
4. Franchise	10	8,38
5. Corners	6	7,50
6. Other	9	31,67

The overwhelming majority of companies sell locally and only one company sells exclusively abroad.

Sales (%)	
Local	67,70
Abroad	32,30

As far as promotional channels are concerned, there appears to be a clear emphasis on the use of Internet, together with brochures and fashion shows. On the other side, more traditional channels, such as: TV, news / newspapers, and magazines are not used.

Promotional channels	Mean value
1. Internet	3,15
2. Informational brochures / newsletters	3,15
3. Fashion shows / exhibitions	3,12
4. At points of sale	2,94
5. Advertisement in the fashion media	2,50
6. Articles in magazines	2,50
7. Family / friends	2,47
8. News / newspapers	1,71
9. TV	1,29
10. Other	2,00

The most common and important competitive advantages that the companies use to highlight their products are: quality, value for money and services to the consumers. On the other hand, it seems that they don't promote product innovation.

Competitive Advantage	Mean value
1. Quality	4,41
2. Value for money	3,94
3. Services to the consumers	3,68
4. Fit	3,56
5. Fashion	3,41
6. Vision	3,26
7. Health and Safety	3,26
8. Innovation	3,21
9. Other	1,97

It is the belief of the majority of the respondents that the customers are buying their products mainly due to high quality and previous good buying experience, followed by value for money. On the other hand, it is clear that they don't view innovation or sales / offers as criterion influencing the potential customer.

Criteria	Mean value
1. Quality	4,47
2. Previous good buying experience	4,29
3. Value for money	4,00
4. Known brand	3,62
5. Price	3,47
6. Production company	3,06
7. Sales / offers	2,97
8. Innovation	2,82
9. Other	2,18

Finally, the following table presents the perceptions of the respondents regarding the positioning of their products in the market vis-à-vis certain criteria.

	1	2	3	4	5	
Traditional		2,97				Ultra-modern
Classic silhouette			3,21			Trendy
Formal			3,12			Casual
Fit important		2,94				Style more important
Sombre			3,21			Colourful
Expensive		2,74				Low Price
Designer detail/identity		2,41				Generic style
Minimal			3,00			Decorative
Sophisticated		2,68				Folkloric
Fit-in to social group		2,94				Stand-out from the crowd
Uniform			3,09			Self-expression
Requires assistance			3,09			Doesn't need assistance
Local demand			3,09			Global demand
Narrow cultural demand			3,50			Wide cultural demand
Narrow age group			3,29			Broad age group
Narrow size range			3,41			Wide size range
Average height/shape		2,56				Atypical sizes
High-tech manufacturing		2,88				Handcrafted
Production quality/time		2,59				Fast production
Luxury fabrics		2,71				Basic fabrics
High Eco/ethical factor		2,76				Low Eco/ethical factor
Narrow choice styles			3,41			Wide choice styles
Stable styles			3,29			Frequent change of styles
Unique to customer			3,00			Make available to all
Build client relationship		2,71				Build customer numbers
Client prefers formality			3,12			Client prefers to chat
Serious interactivity online		2,82				Fun online
Reliability		2,74				Speed

## 4. Conclusions and next steps

From the analysis of the responses in both the in-depth interviews and the on-line survey some specific characteristics of the current profile of the brand manager and of their needs are surfaced. The conclusions are presented in three sections: one dealing with the company needs in order to manage its brands, the next with the profile of the brand manager and the final with the training needs of the brand managers in the children fashion sector. These conclusions will be taken under consideration in the design and implementation of WP2, which deals with the development of the curriculum.

### 4.1. Needs of the companies to manage the brands

From the results of the survey and the in-depth interviews, it became evident that the companies of the sector are beginning to adopt more flexible organisational structures and are beginning to outsource more of their businesses.

In addition, a clear shift to new distribution channels appears necessary covering both local and abroad markets. This means that a wider use of on-line sales through the utilization of Internet is emerging – especially in the northern countries. Nevertheless, still the overwhelming majority of sales is done through wholesale and locally.

Moreover, the Internet is widely used for the promotion of brands, but there still appears some strong dependence on brochures and fashion shows, as alternative promotional channels. The main competitive advantages of the brands are quality and value for money for the majority of the respondents, while the customers buying criteria are quality and previous buying experience.

Overall, the products are viewed as trendy, casual, colorful, wide cultural demand, wide size range, expensive luxury products, unique to customer.

Therefore, the new course should focus on new distribution channels, giving specific cases of successes and failures of previous attempts, while focus should also be given to the presentation of the quality aspects of the various brands, as well as product uniqueness.

### 4.2. Professional profile of the brand manager

The respondents had all multi-disciplinary expertise with marketing and sales as their main professional backgrounds. As far as educational background is concerned, the two main areas of specialization were business studies and marketing.

All respondents were experienced personnel, while their daily activities were mainly focused on sales, promotion, internal coordination of teams, communication with suppliers, and marketing. Part of their responsibilities is the cooperation with a number of external stakeholders, including customers, suppliers and agents. At the same time, internally their main cooperation is with the design, production and finance departments.

The main difficulties that they presented are related to lack of market information and lack of human resources. At the same time, emphasis is placed on personal qualities (i.e. good interpersonal relations, team working, cooperation, communication skills,



etc.) rather than on specific knowledge. That means that for the specific position, on the job training using specific examples is more important, in comparison to traditional training courses.

As a conclusion, the Bram course should focus on upgrading the personality skills of the target trainees, giving them multidisciplinary support to their daily activities.

#### **4.3. Training needs**

New technologies influence considerably the emerging training courses. The new training package should cover a wide range of themes, including customer care, marketing, communication, management, commercial techniques, and time management. Overall, the training should focus on upgrading qualifications and exploiting personal skills and capabilities, of experienced employees.

Finally, since the main obstacle for attending a training course was 'limited time', the Bram course should, therefore, be designed in such a way as to keep face-to-face and/or classroom meetings at a minimum, offering the possibility to undertake the courses on-line.

## 5. Appendices

### 5.1. Appendix 1: Questionnaire for in-depth interview with branding manager

<i>Company:</i>
<i>Name :</i>
<i>Department:</i>
<i>Position:</i>
<i>Date:</i>

### A. Company Profile - Branding activities

1. What is the main activity of your company?

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2. Number of employees per gender: Men: [\_\_\_\_] Women: [\_\_\_\_]

3. Mean age value: [\_\_\_\_]

4. Working relationship:

Type of employment	<i>Number of employees</i>
• Full-time employees	[____]
• Part-time employees	[____]
• Project-based employees (full-time)	[____]
• Project-based employees (part-time)	[____]

5. Education / Training level of employees:

	<i>Number of employees</i>
• Post graduate education (e.g. Master / PhD)	[____]
• Graduate education (University degree)	[____]
• Secondary education (e.g. high-school, secondary school, or gymnasium)	[____]
• Vocational education / Training	[____]
• Other	[____]



6. Please complete the following table regarding your brands

Brand name	Target group	Produced under Royalty?	Distribution Channel (%)			Sales (%)	
			Wholesale	Own Retail Shops (please specify ownership e.g. franchise, own shops, etc.)	Other (please specify)	Local	Abroad (please name countries and %)

**7. Which of the following promotional channels do you use for the promotion of your products?**

Promotional channels	Level (1: a little – 5: a lot)				
	1	2	3	4	5
1. Advertisement in the fashion media	1	2	3	4	5
2. TV	1	2	3	4	5
3. Family / friends	1	2	3	4	5
4. Informational brochures / newsletters	1	2	3	4	5
5. Articles in magazines	1	2	3	4	5
6. News / newspapers	1	2	3	4	5
7. At points of sale	1	2	3	4	5
8. Internet	1	2	3	4	5
9. Other	1	2	3	4	5

**8. Which competitive advantage do you highlight when branding your products?**

Competitive Advantage	Level (1: a little – 5: a lot)				
	1	2	3	4	5
1. Innovation	1	2	3	4	5
2. Vision	1	2	3	4	5
3. Quality	1	2	3	4	5
4. Value for money	1	2	3	4	5
5. Services to the consumers	1	2	3	4	5
6. Fashion	1	2	3	4	5
7. Fit	1	2	3	4	5

**9. What criteria do you believe that your customers use when they purchase your products?**

Criteria	Level (1: a little – 5: a lot)				
	1	2	3	4	5
1. Innovation	1	2	3	4	5
2. Sales / offers	1	2	3	4	5
3. Production company	1	2	3	4	5
4. Price	1	2	3	4	5
5. Known brand	1	2	3	4	5
6. Previous good buying experience	1	2	3	4	5
7. Quality	1	2	3	4	5
8. Other	1	2	3	4	5

**B. Personal Details**

**10. What is your age?**

<25	<input type="checkbox"/>	<input type="checkbox"/>
25-40	<input type="checkbox"/>	<input type="checkbox"/>
40-55	<input type="checkbox"/>	<input type="checkbox"/>
>55	<input type="checkbox"/>	<input type="checkbox"/>

**11. Educational level**

			Degree
Post graduate education (e.g. Master / PhD)	<input type="checkbox"/>	<input type="checkbox"/>	_____
Graduate education (University degree)	<input type="checkbox"/>	<input type="checkbox"/>	_____
Secondary education (e.g. high-school, secondary school, or gymnasium)	<input type="checkbox"/>	<input type="checkbox"/>	_____
Vocational education / Training	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other	<input type="checkbox"/>	<input type="checkbox"/>	_____

**12. Foreign languages:**

	Good	Somewhat	Elementary
▪ English			
▪ French			
▪ Other: .....			
.....			

**13. Computer skills**

	Good	Somewhat	Elementary
▪ Word			
▪ Excel			
▪ Power Point			
▪ Access			
▪ Internet			
▪ Other: .....			
▪ .....			

## C. Professional Career

### 14. Working years:

- 0 - 1 year
- 2 - 5 years
- 6 - 10 years
- >10 years

### 15. Which professions have you exercised in the past and in which position?

	Speciality / Profession	Length (in months or years)	Position*	Company name
1.				
2.				
3.				
4.				
5.				

\* please note one of the following:

1. *Self-employed*
2. *Employed*
3. *Assistant without payment in family business*

### 16. Years employed in this company:

- 0 - 1 year
- 2 - 5 years
- 6 - 10 years
- >10 years

### 17. Years in this specific position:

- 0 - 1 year
- 2 - 5 years
- 6 - 10 years
- >10 years

### 18. Which of the following are valid for your specific position?

- I need further training in order to better correspond in my duties
- My duties fit well my specialities
- I have the specialities to correspond to more demanding duties

19. Describe your work: which are the main activities that you have to undertake in a steady basis? How much time in percentage does each of these need?

TIME (percentage)	COMMON ACTIVITIES
%	1.
%	2.
%	3.
%	4.
%	5.
%	6.
%	7.
%	8.
%	9.
%	10.

20. Which are the most important difficulties that you face at work (max 3)? During which of the above mentioned activities does each of this appear?

DIFFICULTY	ACTIVITY (please use the number of the previous table)
1.	
2.	
3.	

21. If you were seeking for a new partner to work in exactly the same position as your, what knowledge, capabilities and behaviour patterns would you require?

<p><b>KNOWLEDGE</b> The necessary theoretical knowledge for the successful implementation of the job (e.g. logistics, foreign languages, etc.)</p>	
<p><b>CAPABILITIES</b> The practical requirements of a job position (e.g. oral expression, use of equipment, public presentation, team management)</p>	
<p><b>BEHAVIOUR</b> The professional behaviour that the position requires (e.g. team spirit, understanding, positive attitude towards the customer)</p>	

22. With which internal and external partners do you cooperate often?

<p><b>INTERNAL</b> (Directors, other departments, etc.)</p>	<p><b>EXTERNAL</b> (Customers, suppliers, etc.)</p>
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

23. Do you have the management responsibility of a team? If YES, how large is the team? .....

24. Please report the activities for which you have the final decision.

ACTIVITIES	
1.	2.
3.	4.
5.	6.

25. Do you have any prior experience of continuous professional training? If YES, please complete the following table.

THEME	TRAINING TYPE (Seminar, distance learning, on the job training, etc.)
a.	
b.	
c.	
d.	
e.	

26. Have you identified any specific themes that you would be interested for training? If yes, who offers them and what would you expect from each one?

TRAINING THEME	TRAINING ORGANISATION	EXPECTED RESULTS
1.		
2.		
3.		
4.		
5.		

## 5.2. Appendix 2: Questionnaire for on-line survey

<i>Company:</i>	
<i>Name of respondent (optional):</i>	
<i>Department:</i>	
<i>Position:</i>	

### A. Personal Details

#### 1. What is your age?

- <25
- 25-35
- 35-45
- 45-55
- >55

#### 2. Educational level

- Post graduate education (e.g. Master / PhD)
- Graduate education (University degree)
- Secondary education (e.g. high-school, secondary school, or gymnasium)
- Vocational education / Training
- Other

#### 3. Foreign languages:

	1: Good	2: Somewhat	3: Elementary
▪ English			
▪ French			
▪ German			
▪ Other: ..... .....			

#### 4. Computer skills

	1: Good	2: Somewhat	3: Elementary
▪ Word			
▪ Excel			
▪ Power Point			
▪ Access			
▪ Internet			
▪ Drawing packages e.g. Corel			
▪ Other: ..... .....			

## B. Professional Career

### 5. Working years:

- 0 - 1 year
- 2 - 5 years
- 6 - 10 years
- >10 years

### 6. Years in this specific position:

- 0 - 1 year
- 2 - 5 years
- 6 - 10 years
- >10 years

### 7. Educational / training background

- 1. Business studies
- 2. Marketing
- 3. Management
- 4. Communication studies
- 5. Economics / Financial studies
- 6. Technological studies (e.g. IT)
- 7. Engineering
- 8. Other

### 8. Professional background

- 1. Marketing / sales
- 2. Public Relations
- 3. Human Resources
- 4. Advertising
- 5. Product development
- 6. Design
- 7. IT / Web
- 8. Other

### 9. Please report the percentage of time that you spent on your daily activities.

Activities	Time
1. Product Design	%
2. Product development	%
3. Marketing	%
4. Sales & promotion	%
5. Public relations – advertising – press relation – communication	%
6. Information technology / Web support	%
7. Financial issues (budgeting / invoices etc.)	%
8. Coordination with internal team (designers, management, sales, etc.)	%
9. Communication with suppliers	%
10. Organisation of events / preparation of catalogues / photography	%
11. Company strategy – competition and consumer research	%
12. Other	%

**10. Please report work difficulties that you face**

Difficulties	1: minor difficulty – 5: major difficulty				
	1	2	3	4	5
1. Lack of human resources	1	2	3	4	5
2. Work organisation	1	2	3	4	5
3. Lack of market information	1	2	3	4	5
4. Lack of marketing knowledge	1	2	3	4	5
5. Credit recovery	1	2	3	4	5
6. Marketing activities	1	2	3	4	5
7. Managing promotional events / photo shoots etc.	1	2	3	4	5
8. Other	1	2	3	4	5

**11. Please report on a scale from 1 to 5 on the importance that you place on what your job requires as far as knowledge, capabilities and behaviour is concerned.**

	Required capabilities	1: minor importance – 5: major importance				
		1	2	3	4	5
<b>K N O W L E D G E</b>	11. Accounting / financial knowledge	1	2	3	4	5
	12. Business management degree	1	2	3	4	5
	13. Foreign languages	1	2	3	4	5
	14. IT	1	2	3	4	5
	15. Marketing knowledge in retail & fashion market	1	2	3	4	5
	16. Advertising / press communication	1	2	3	4	5
	17. Design	1	2	3	4	5
	18. Commercial background	1	2	3	4	5
	19. Technical product knowledge	1	2	3	4	5
	20. Other	1	2	3	4	5
<b>C A P A B I L I T I E S</b>	13. Negotiation skills	1	2	3	4	5
	14. Inter-personal relations	1	2	3	4	5
	15. Flexibility	1	2	3	4	5
	16. Work under pressure	1	2	3	4	5
	17. Oral expression	1	2	3	4	5
	18. Team management	1	2	3	4	5
	19. Team working	1	2	3	4	5
	20. Determination	1	2	3	4	5
	21. Analytical mind	1	2	3	4	5
	22. Previous experience on commercial, design and production fields	1	2	3	4	5
<b>B E H A V I O U R</b>	23. Computer skills	1	2	3	4	5
	24. Other	1	2	3	4	5
	14. Team spirit	1	2	3	4	5
	15. Cooperation	1	2	3	4	5
	16. Proactiveness	1	2	3	4	5
	17. Consistency	1	2	3	4	5
	18. Adaptability	1	2	3	4	5
	19. Communicative	1	2	3	4	5
20. Well-organised	1	2	3	4	5	
21. Fair-minded, understanding, easy going	1	2	3	4	5	
22. Creative	1	2	3	4	5	

23. Positive attitude towards the customer	1	2	3	4	5
24. Open minded to new cultures and influences	1	2	3	4	5
25. Aware of the socioeconomic environment	1	2	3	4	5
26. Other	1	2	3	4	5

**12. Please indicate with whom you cooperate internally at your work.**

- 14. General manager
- 15. Commercial manager
- 16. Technical manager
- 17. Design department
- 18. Computer department
- 19. Logistics
- 20. Retail
- 21. Production manager
- 22. Purchasing
- 23. Sales manager
- 24. Tailoring
- 25. Finance department
- 26. Other

**13. Please indicate with whom you cooperate externally at your work.**

- 13. Suppliers
- 14. Customers (e.g. shops)
- 15. Consumers
- 16. IT/Web consultants
- 17. Photographers
- 18. External Designers
- 19. Headquarters
- 20. Advertising agencies
- 21. Press agencies
- 22. Print suppliers
- 23. Agents
- 24. Other

### C. Professional Training

14. Please place importance scale on the training needs that your position has and what you need.

Training needs	1: minor importance – 5: major importance				
	1	2	3	4	5
17. Management	1	2	3	4	5
18. Commercial techniques	1	2	3	4	5
19. International trade in Internet	1	2	3	4	5
20. Marketing design	1	2	3	4	5
21. Retail	1	2	3	4	5
22. Financing	1	2	3	4	5
23. IT	1	2	3	4	5
24. Organisation	1	2	3	4	5
25. Customer care / marketing	1	2	3	4	5
26. Communication	1	2	3	4	5
27. Human Resources	1	2	3	4	5
28. Time management	1	2	3	4	5
29. Sales forecast	1	2	3	4	5
30. Languages	1	2	3	4	5
31. Motivation techniques	1	2	3	4	5
32. Other	1	2	3	4	5

15. Please indicate reasons for participating or not in training.

#### Reasons for participating in training

- 9. Upgrade of qualifications
- 10. Better opportunities for new job in case of redundancy
- 11. Maintaining current job
- 12. Introduction of new technologies in the company
- 13. Exploitation personal skills and capabilities
- 14. Provision of motives from the company
- 15. Support professional career
- 16. Other

#### Reasons for not participating in training

- 6. Current job does not have any particular requirements
- 7. In my current situation, training is not considered essential
- 8. Limited time
- 9. Learning difficulties
- 10. Other

## D. Branding activities

16. Number of employees per gender: Men: [\_\_\_\_] Women: [\_\_\_\_]

17. Please complete the following tables regarding your brands

Distribution Channel (% of sales)	
7. Wholesale	
8. Own shops	
9. Franchise	
10. Corners	
11. On-line	
12. Other	

Sales (%)	
Local	
Abroad	

18. Which of the following promotional channels do you use for the promotion of your products?

Promotional channels	Level (1: a little – 5: a lot)				
	1	2	3	4	5
11. Advertisement in the fashion media					
12. TV					
13. Family / friends					
14. Informational brochures / newsletters					
15. Articles in magazines					
16. News / newspapers					
17. At points of sale					
18. Internet					
19. Fashion shows / exhibitions					
20. Other					

19. Which competitive advantage do you highlight when branding your products?

Competitive Advantage	Level (1: a little – 5: a lot)				
	1	2	3	4	5
10. Innovation					
11. Vision					
12. Quality					
13. Value for money					
14. Services to the consumers					
15. Fashion					
16. Fit					
17. Health and Safety					
18. Other					

**20. What criteria do you believe that your customers use when they purchase your products?**

Criteria	Level (1: a little – 5: a lot)				
	1	2	3	4	5
10. Innovation	1	2	3	4	5
11. Sales / offers	1	2	3	4	5
12. Production company	1	2	3	4	5
13. Price	1	2	3	4	5
14. Known brand	1	2	3	4	5
15. Previous good buying experience	1	2	3	4	5
16. Quality	1	2	3	4	5
17. Value for money	1	2	3	4	5
18. Other	1	2	3	4	5

**21. Please indicating the attribute that best positions your (intended) product range and consumer attitude between the two descriptor axes.**

	1	2	3	4	5	
Traditional						Ultra-modern
Classic silhouette						Trendy
Formal						Casual
Fit important						Style more important
Sombre						Colourful
Expensive						Low Price
Designer detail/identity						Generic style
Minimal						Decorative
Sophisticated						Folkloric
Fit-in to social group						Stand-out from the crowd
Uniform						Self-expression
Requires assistance						Doesn't need assistance
Local demand						Global demand
Narrow cultural demand						Wide cultural demand
Narrow age group						Broad age group
Narrow size range						Wide size range
Average height/shape						Atypical sizes
High-tech manufacturing						Handcrafted
Production quality/time						Fast production
Luxury fabrics						Basic fabrics
High Eco/ethical factor						Low Eco/ethical factor
Narrow choice styles						Wide choice styles
Stable styles						Frequent change of styles
Unique to customer						Make available to all
Build client relationship						Build customer numbers
Client prefers formality						Client prefers to chat
Serious interactivity online						Fun online
Reliability						Speed