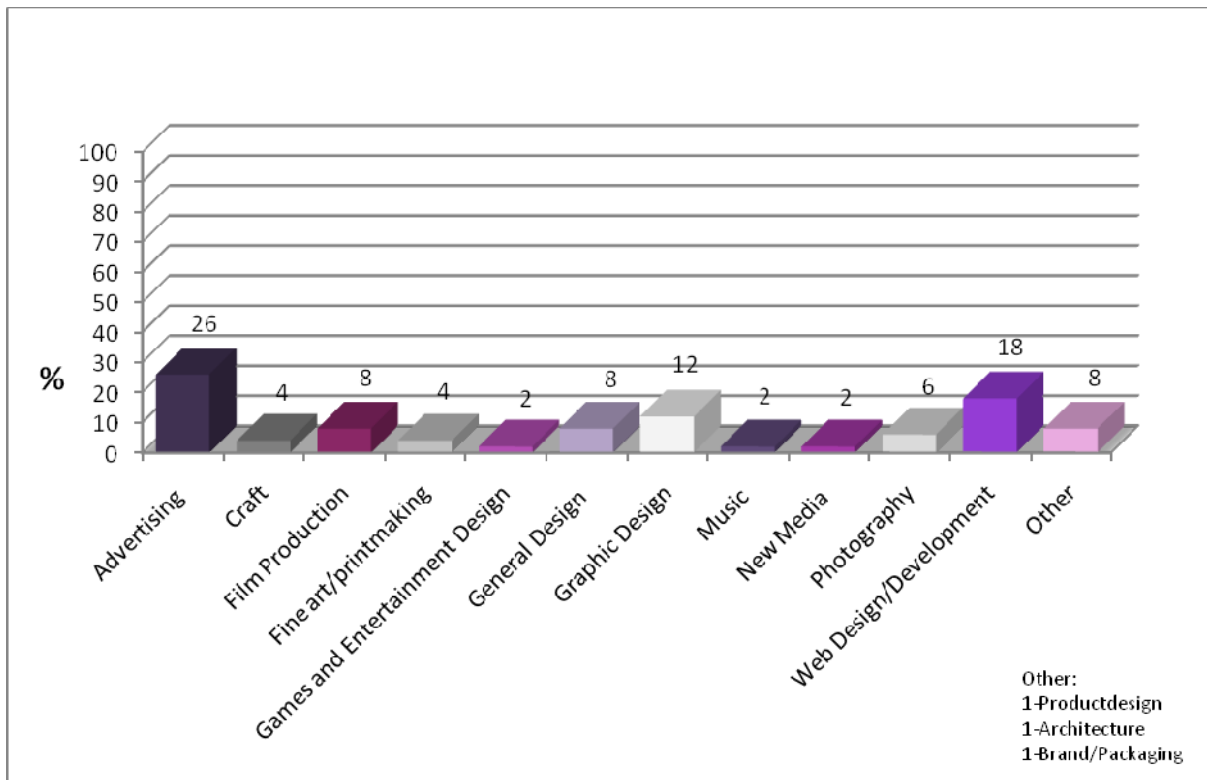


CCC-Evaluation-Hamburg

The HAW-Hamburg has collected 30 filled out questionnaires. A significant part of them was not filled out completely. Especially questions which ask for a financial statement were not filled out.

Question 1: In which sector does your business operate?



Most of the people who were interviewed were working in the advertising (26%) and web design/ development (18%) sector and graphic design (12%). Cumulated they count 56% of the interviewees.

Other occupancies were:

-product design (1 person)

-architecture (1 person)

-brand/ packaging design (1 person)

-journalism/ print- and online und publishing products (in-house) (1 person)

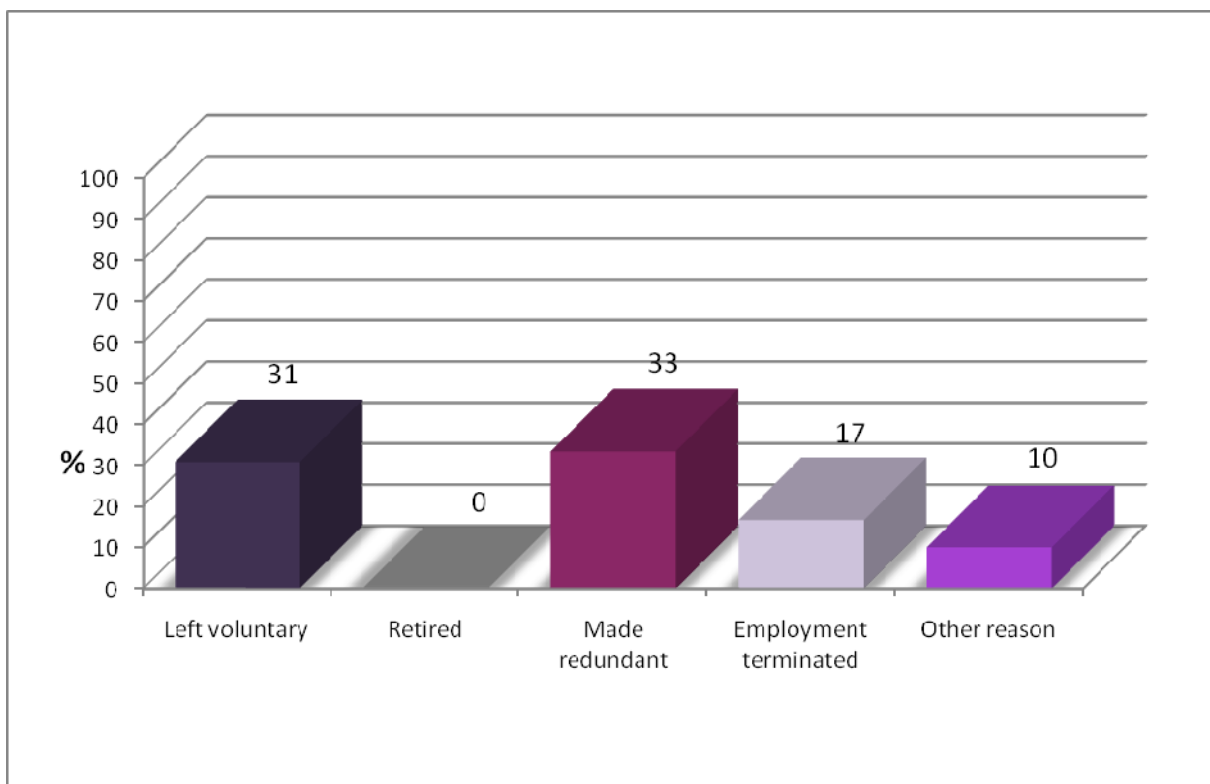
Question 2: How many people are employed by the business?

The range varies between 1 and 20. The average value is 6. Those results indicate that most of the companies which were interviewed were small businesses.

Question 3: How many people have you recruited in the last 12 months?

The range varies between 1 and 6. The average value is 1.

Question 4: How many people have left in the last 12 months for each of the following reasons?



The results of the interview indicate that most of the employees were made redundant (33%). 31% of the employees left voluntarily. 17% of the staff has left the company because their employment terminated.

Other reasons were:

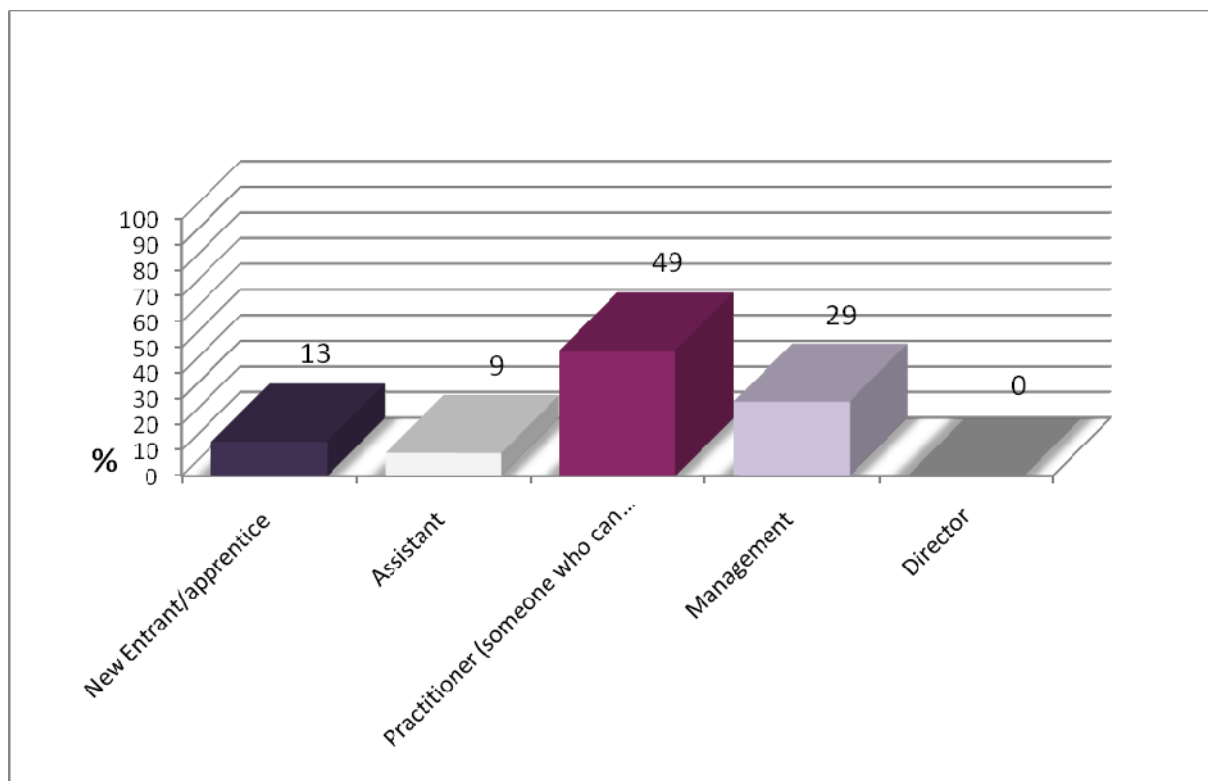
- trainee was not employed after the on the job training (one answer)
- maternity leave (one answer)
- not enough work orders (one answer)

Question 5: What occupations are employees, including yourself, employed in? (please list the one MAIN activity engaged with)

Comments: Most off the people who were interviewed have chosen multiple categories, because they felt that they do not belong in one particular preset category. Their answers were count in percent.

What occupations are employees, including yourself, employed in?		
Trainee	3%	6%
Administration	3%	6%
finance & accounts	3%	6%
personal assistant	3%	6%
creative practitioner	10%	20%
account management	5%	10%
Marketing	3%	6%
project management	5%	10%
project/business development	5%	10%
planning/operations	2%	4%
human resources	0%	0%
Management	9%	18%

Question 6: At what 'level' are people employed in your organization?



The results of the survey show that the main part (49%) of the people working in the organizations were at the practitioner level (somebody who can execute his role without supervision). 29% of the people employed were working on a management level. A significant (13%) fraction of the employees were working on the level of new entrants/apprentices and 9% on an assistant level.

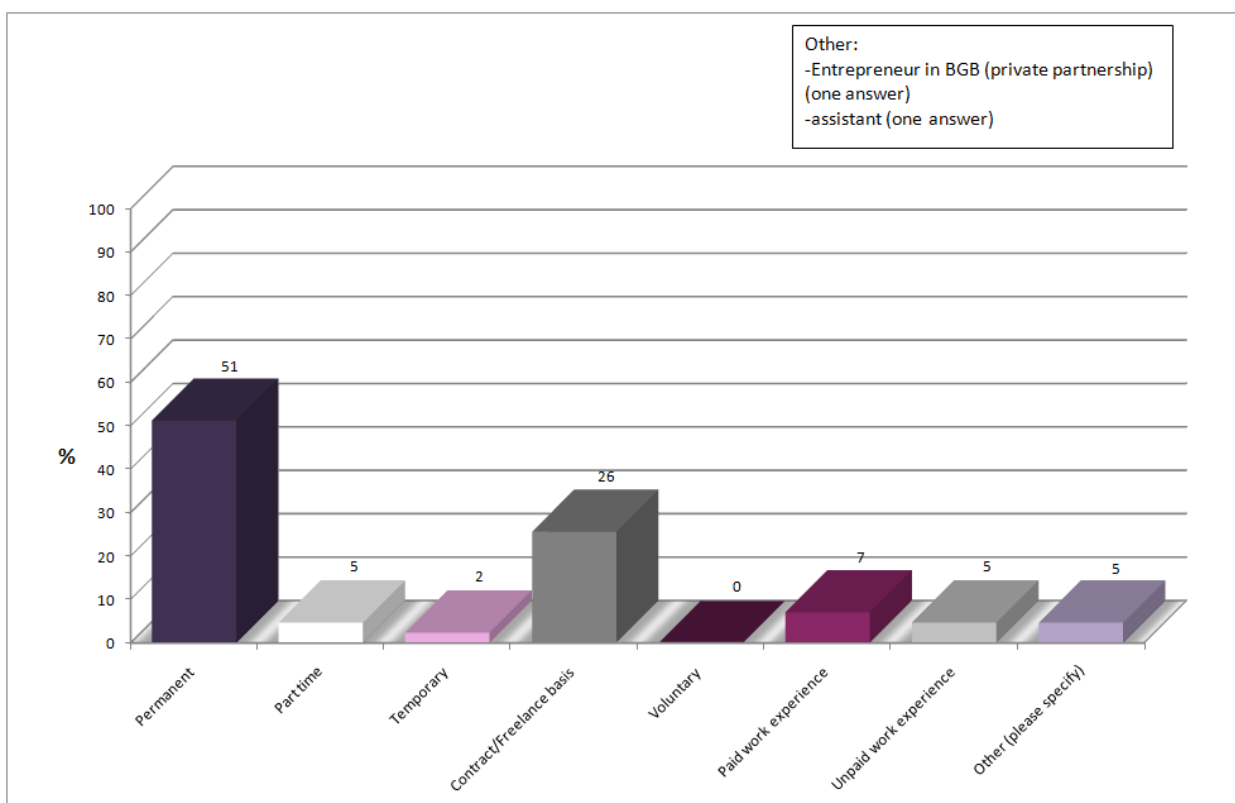
Question 7: On what basis are the people employed within the organisation?

The data analysis indicates that more than half of the people employed in the creative sector who were interviewed are belonging to the permanent staff. More than one quarter (26%) of the people are employed on contracts/ freelance basis.

The other categories vary between 0 and 7%.

Other answers were:

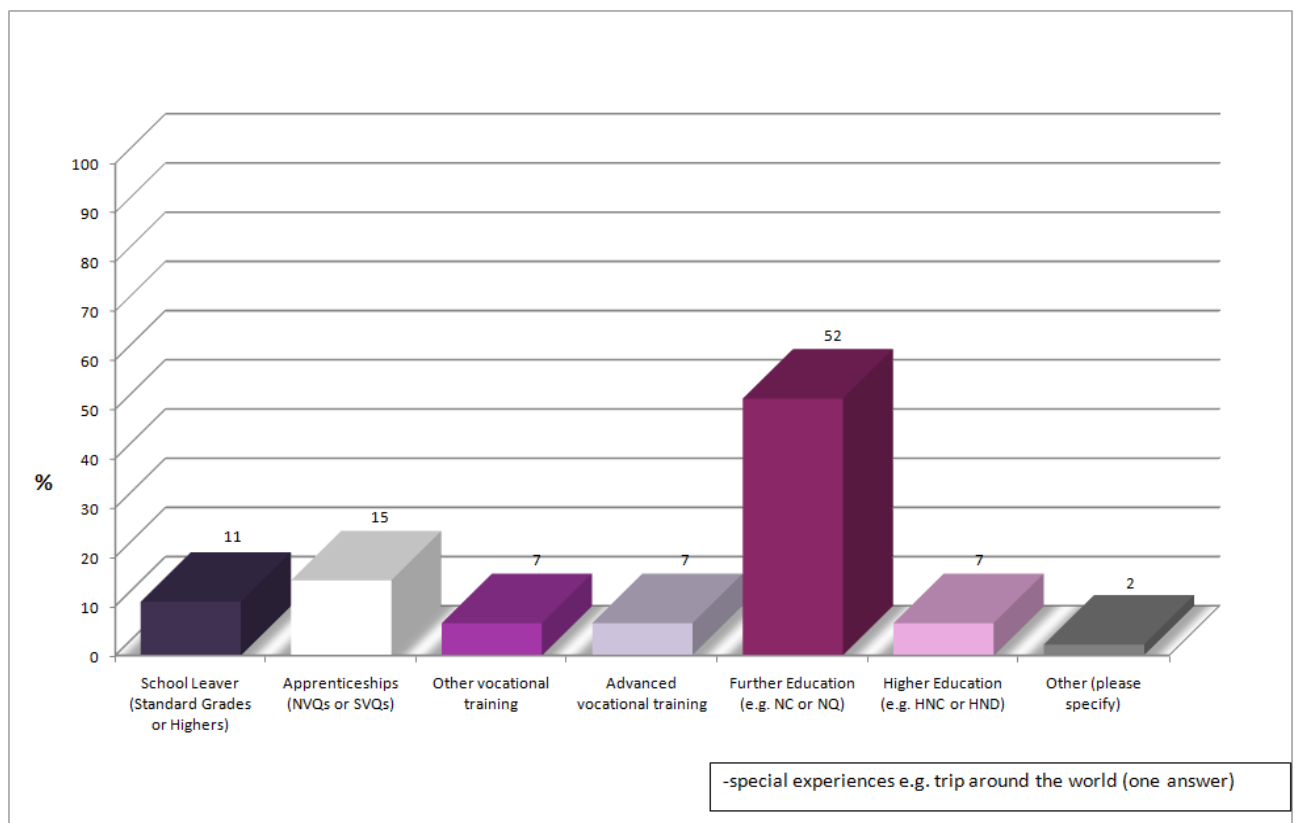
- Entrepreneur in BGB (private partnership) (one answer)
- assistant (one answer)



The absolute results of the evaluation can be seen in the chart on the next page.

On what basis are the people employed within the organization?		
	Total value	%
Permanent	22	51
Part time	2	5
Temporary	1	2
Contract/Freelance basis	11	26
Voluntary	0	0
Paid work experience	3	7
Unpaid work experience	2	5
Other (please specify)	2	5

Question 8: What qualifications do the people involved in the organisation's core business activity tend to have?

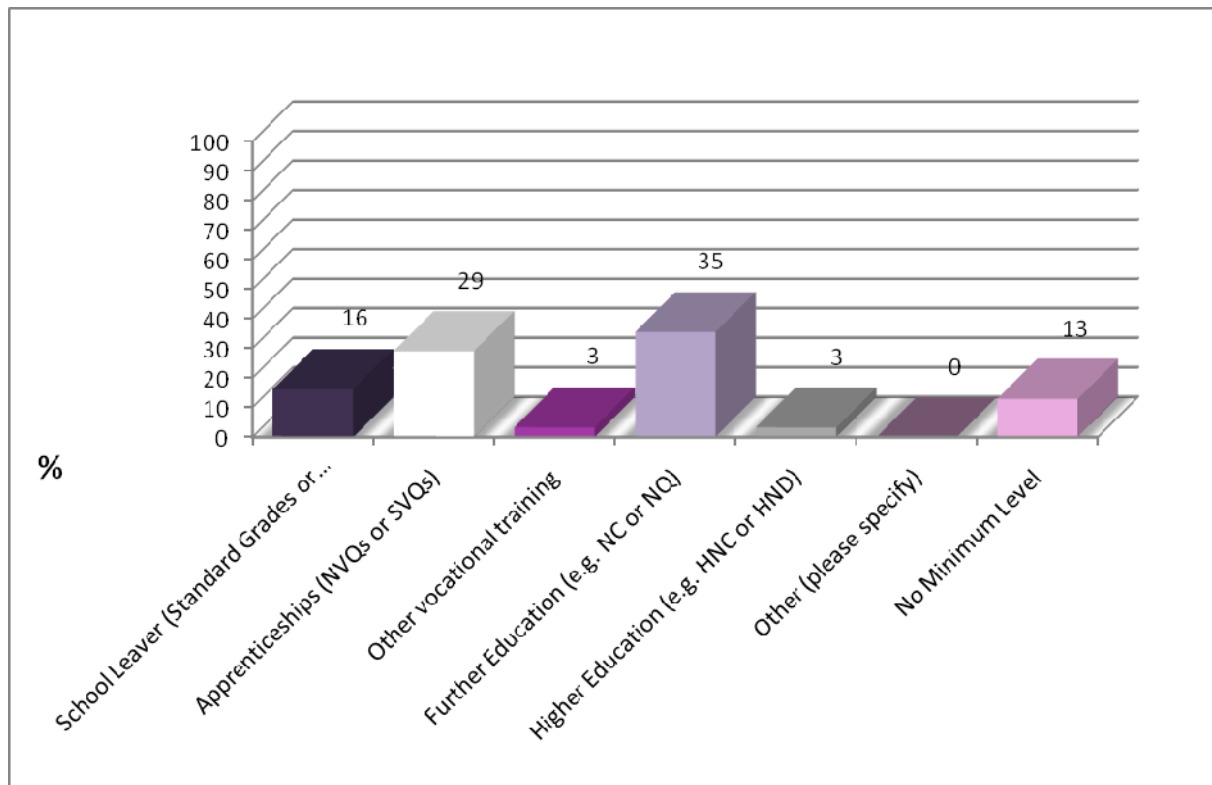


The bar chart shows that most of the interviewees (52%) tend to have further education. 15% of the people have apprenticeships and 11% are school leavers. Categories like other vocational training, advanced vocational training and higher education were chosen by 7% (each) of the interviewees.

Other answers were:

-special experiences e.g. trip around the world (one answer)

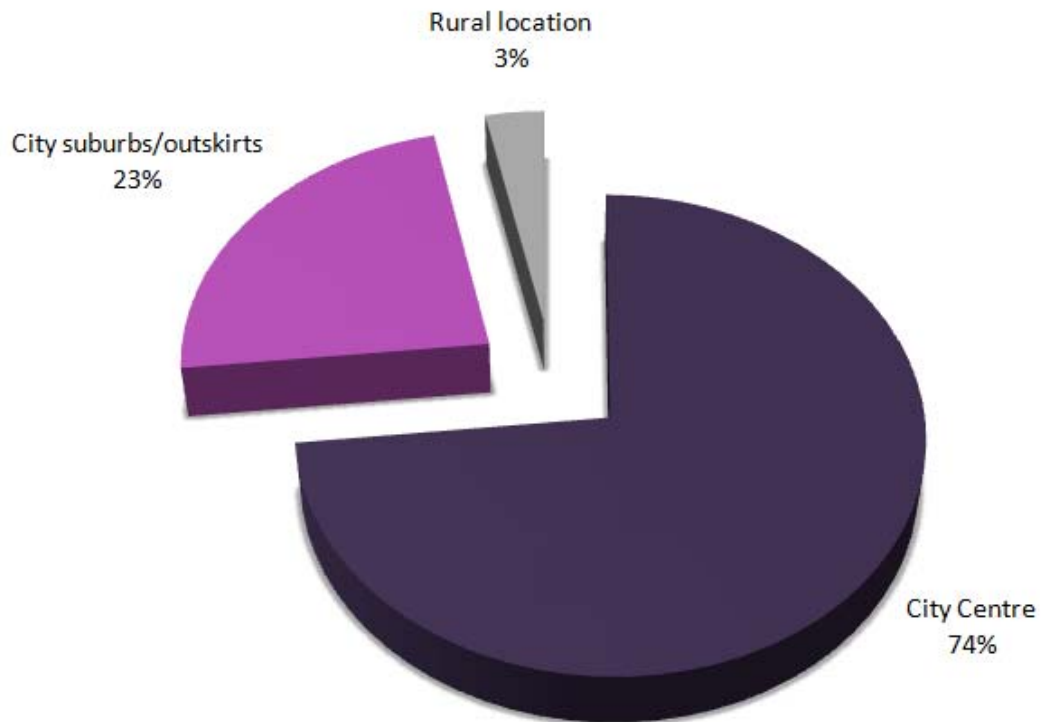
Question 9: What is the current MINIMUM educational level you expect for recruits into core business activity?



Question 10: Which of the following 'working practices' does the business employ?

	Total value	%
Circulating information on organizational performance and strategy	13	12
Providing all employees with a copy of the business plan and targets	1	1
Self-managed or self-directed teams	10	9
A formal induction process	7	6
Annual appraisals	10	9
Formal feedback on job performance	7	6
Annual review of employees' training needs	2	2
Continuous skills development programmes	2	2
A formal professional development framework/structure for staff	1	1
Coaching and/or mentoring	8	7
Performance related pay	14	12
Profit-sharing	7	6
Flexible working	19	17
Non-pay benefits (e.g. free meals, gifts or health packages)	11	10
None of these	1	1

Question 11: Where is your business located? (please pick one)



The figure shows that the majority 74% of the business is located in the city centre. 23% of the creative entrepreneurs have their business located in city suburbs/outskirts and a minority of 3% is located in a rural location.

Question 12: What type of property is your business located in?

	Own home (either owned or rented)	Communal/shared studio space	Rented offices/studios	Owned offices/studios
Total value	4	7	17	2
%	13	23	57	7

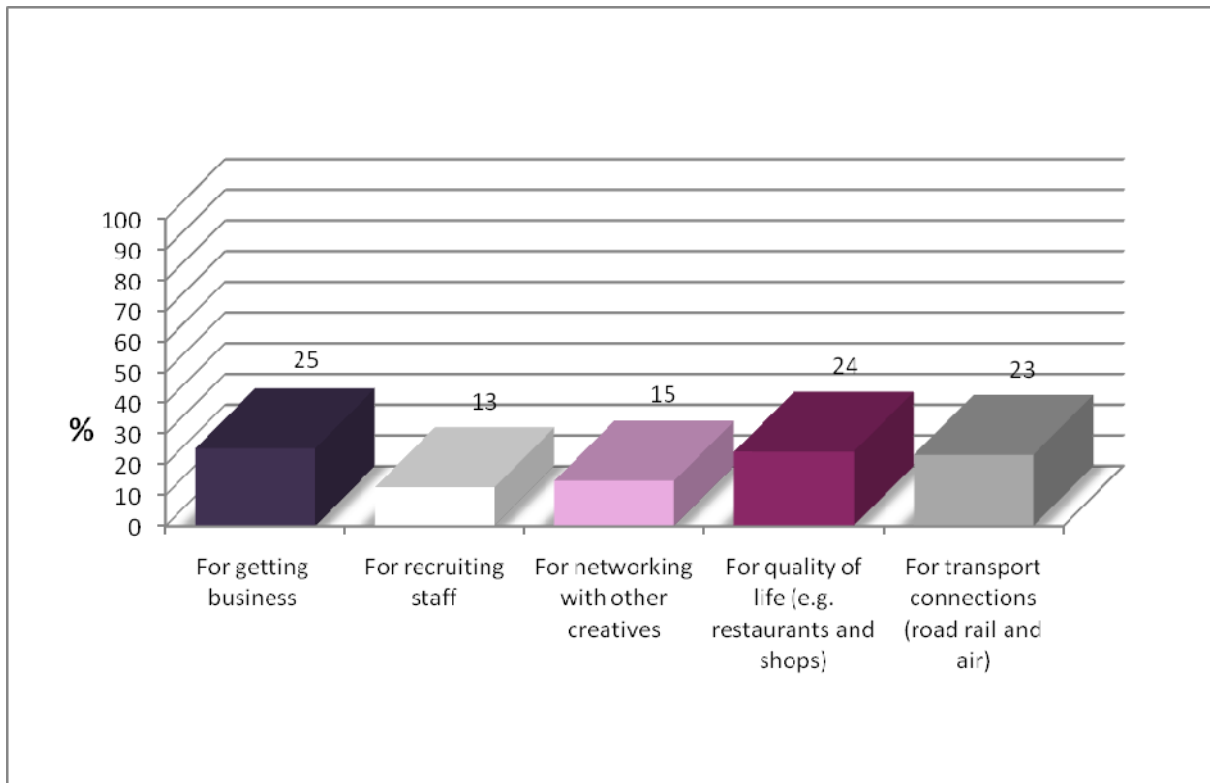
Question 13: Where are the core and support activities of your business undertaken?

	Wholly in the main location	Mostly in the main location with some home working	Core workers work mostly from home and come into office for meetings/support
Total value	14	13	1
%	50	46	4

Comments:

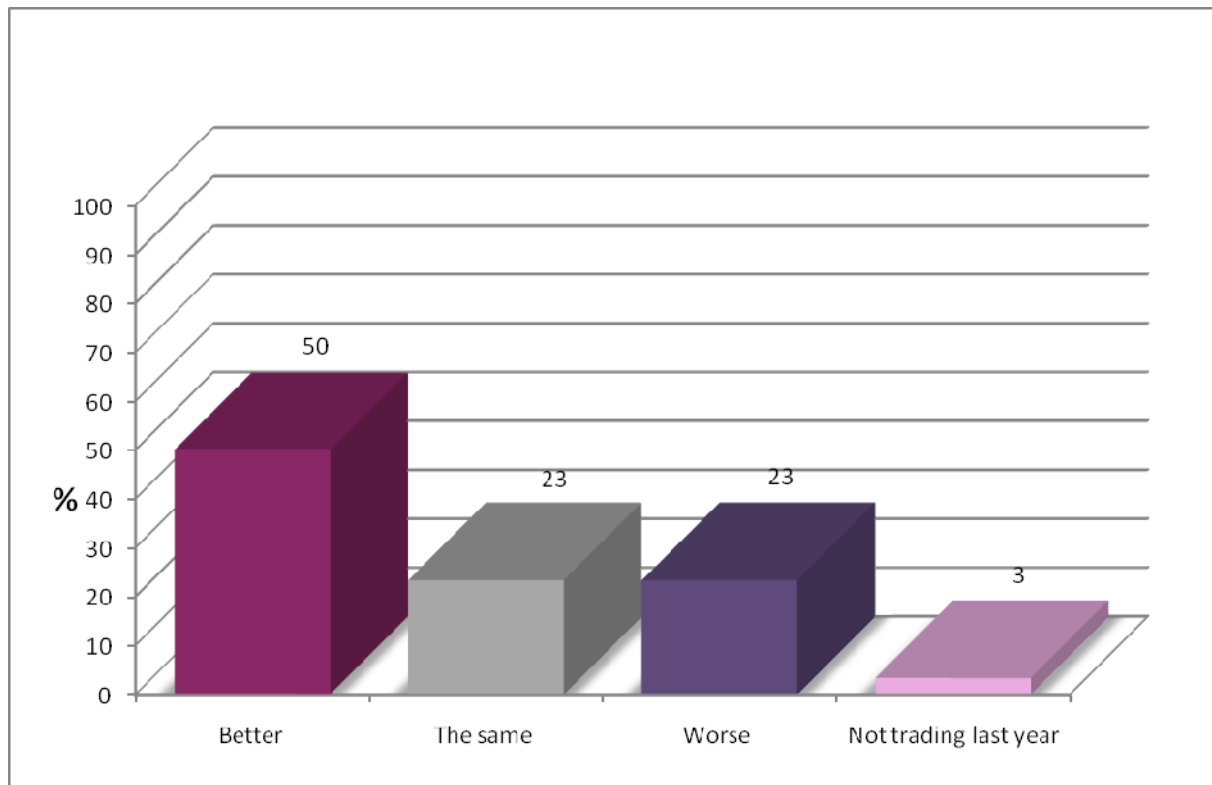
-worldwide (one answer)

Question 14: How important is to your business that you are located in an urban environment?



The evaluated questions indicate that approximate one quarter the interviewees state that an urban environment is important for getting business, the quality of life and for transport and connection. 15% of the people who have been interviewed think that an urban environment is needed for networking with other creative entrepreneurs and 13% values urban environment as supporting for the recruitment of staff.

Question 15: How well do you feel the business is doing compared to this time last year? (please pick one)



50% of the interviewees have the impression that the business is doing better than the year before. 23% of the people feel that it is stable/ unchanged. 23% of the entrepreneurs from the creative industries have the impression that the business is doing worse than it was the year before. 3% of the entrepreneurs were not trading the year before (newcomers).

Question 16: How has your business performed over the last two financial years?

	Increased	Decreased	Stayed the same
Turnover (tv)	14	10	6
Turnover (%)	47	33	20
Profitability (tv)	15	9	5
Profitability (%)	50	30	17

Question 17, question 18 and question 19

Questions 17-19 were not answered by most of the participants of the interview.

That might be because the financial situation is a sensitive topic or because the entrepreneurs do not know exactly how their turnover was. If this is the case that might be caused because of a lack of financial skills. The results of the questions are shown in the chart below.

17. What was the business's turnover for the last financial year?	18. What was your total profit before tax for the last financial year?	19. What was the business's total salary bill for the last financial year?
€	€	€
440.000		70.000
420.000	20.000	250.000
1.500.000	100.000	600.000
1.000.000	150.000	350.000
12.000		
300.815	94.794	13.474
18.000	16.000	10.000
50.000	20.000	
330.000	20.000	160.000

Question 17. has been answered by 9 of 30 people.

The range is between 12.000€ and 1.500.000€ and the average value is 452.312€.

Question 18 has been answered by 7 of 30 people.

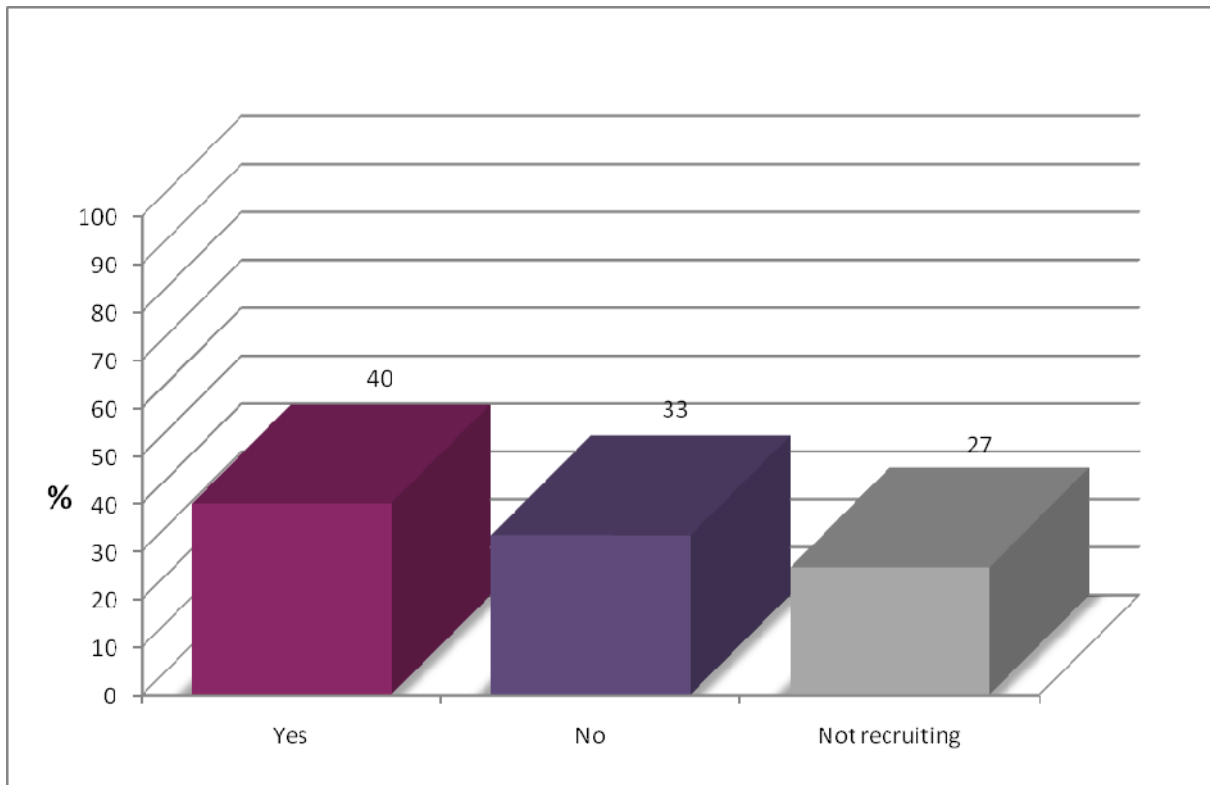
The range is between 16.000€ and 600.000€ and the average value is 60113€.

Question 19. has been answered by 7 of 30 people.

The range is between 13.475€ and 160.000€ and the average value is 207639,14€.

Question 20: Are you experiencing or have you experienced difficulty recruiting staff to undertake the core activities of your business?

(please tick one)



The evaluation of the questionnaires leads to the conclusion that 40% of the entrepreneurs are having experiences or are experiencing difficulties concerning the recruitment of staff for their business. 33% do/ did not have any problems concerned with the recruitment of new staff and 27% of the entrepreneurs are not recruiting.

Question 21: If yes, why would you say you are experiencing or have you experienced difficulties with recruiting staff to undertake the core activities of your business?

	Total value	%
There have been few or no applicants Applicants lack the specialist industry skills you require (e.g. technical, practical or creative skills, theoretical understanding, processes and best practice)	2	5
Applicants lack the specialist industry skills you require (e.g. technical, practical or creative skills, theoretical understanding, processes and best practice)	12	31
Applicants lack the transferable skills you require for (e.g. literacy, communication skills, leadership and management)	3	8
Applicants lack the enterprise skills that you require (e.g. time and project management skills, business development and growth skills)	4	10
Applicants lack the qualifications you require (e.g. accredited/certified achievements, such as degrees, professional qualifications)	1	3
Applicants lack the experience you require (time already spent in the profession as opposed to skills held)	7	18
Applicants tend to have poor attitudes and/or low motivation	7	18
Other (please state)	3	8

Other answers were:

- A lack of network exists. That way it is hard to find experts without education but with passion (one answer)
- too many average job applicants (one answer)
- too low payment (one answer)

Question 22: Relating to the above, what training provisions do you feel are lacking or could help with minimizing these difficulties?

	Total value (absolute)	%
Full time college education to develop practical industry skills	4	19
Full time university education to develop practical industry skills	2	10
Greater development of transferable skills in college/university courses	4	19
Greater development of enterprise skills in college/university courses	1	5
Short course, part time and/or flexible delivery of courses to develop practical industry skills	2	10
Short course, part time and/or flexible delivery of courses to develop transferable and enterprise skills	3	14
Bespoke work place based training	3	14
Other (please specify)	2	10

Other:

- Finding no achievement - no job! (one answer)

Question 23: What impact would you say that recruitment difficulties/skills shortages have had on your business?

	Total value	%
No real impact	3	8
Increased workload for others	7	19
Difficulties meeting quality standards	7	19
Lost business or business turned away	4	11
Reduced business growth	3	8
Increased operating costs	4	11
Delays to developing new products/services	5	14
Difficulties introducing new working practices	0	0
More work is outsourced	4	11
Other (please specify)	0	0

Comments: no comments

Question 24: Are there other key areas where you have experienced difficulty recruiting (e.g. admin support) that have had impact on your business?

	Total value	%
Yes	1	6
No	11	65
Not tried	5	29
If yes, please state which	0	0

Comments: no comments

Question 25: In general, why would you say you are experiencing skills gaps in this occupation?

	Total value	%
Lack of experience	18	42
Lack of 'time served'	1	2
Limited time for training	3	7
Limited budget for training	8	19
Limited availability of training	4	9
High staff turnover	3	7
Difficult to keep up with change	4	9
Other (please specify)	2	5

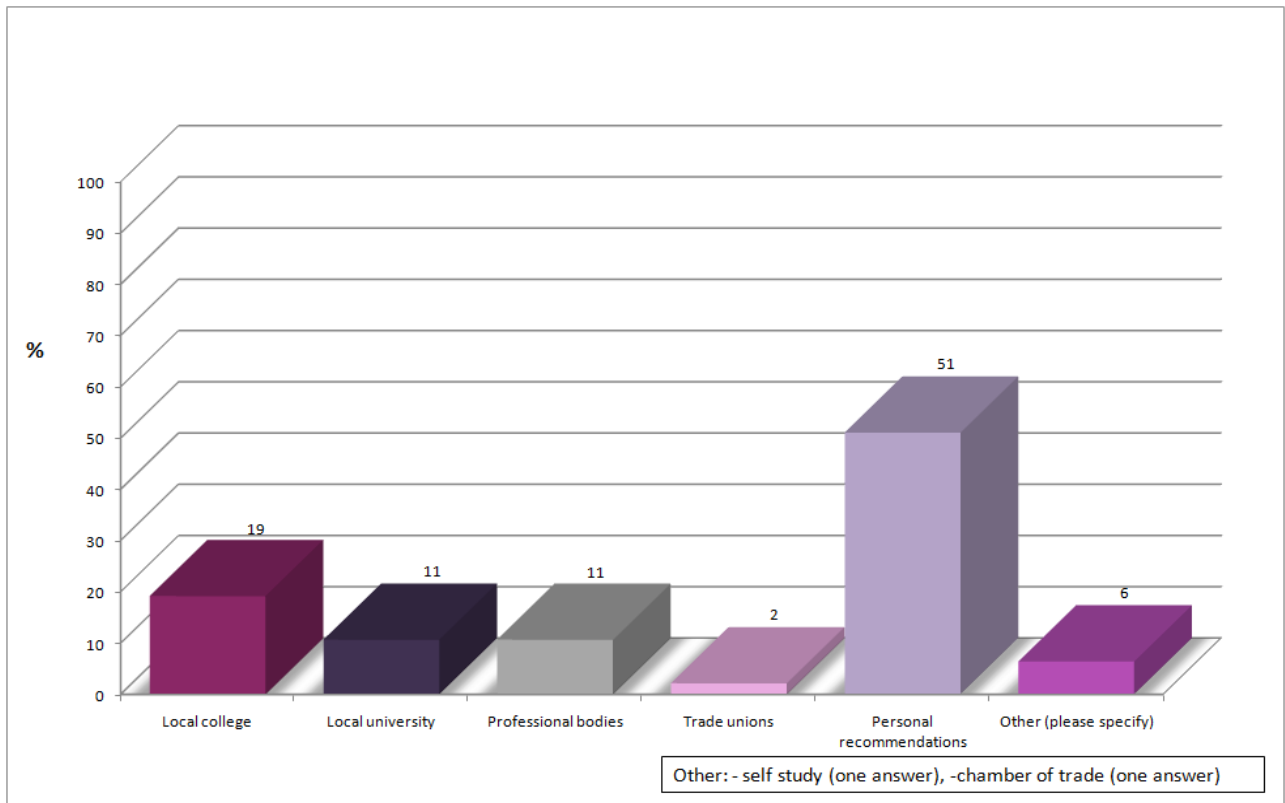
Other:

- a lack of continuity/ high fluctuation (one answer)
- find own passion

Question 26: How would you rate your understanding of the skills and training opportunities available for your business?

	Total value	%
I am totally confused by it	9	35
I understand some elements, but am unsure of others	11	42
I understand it fairly well or completely	6	23

Question 27: Which of the following sources would you use to get information, advice and guidance on skills, training and qualifications?

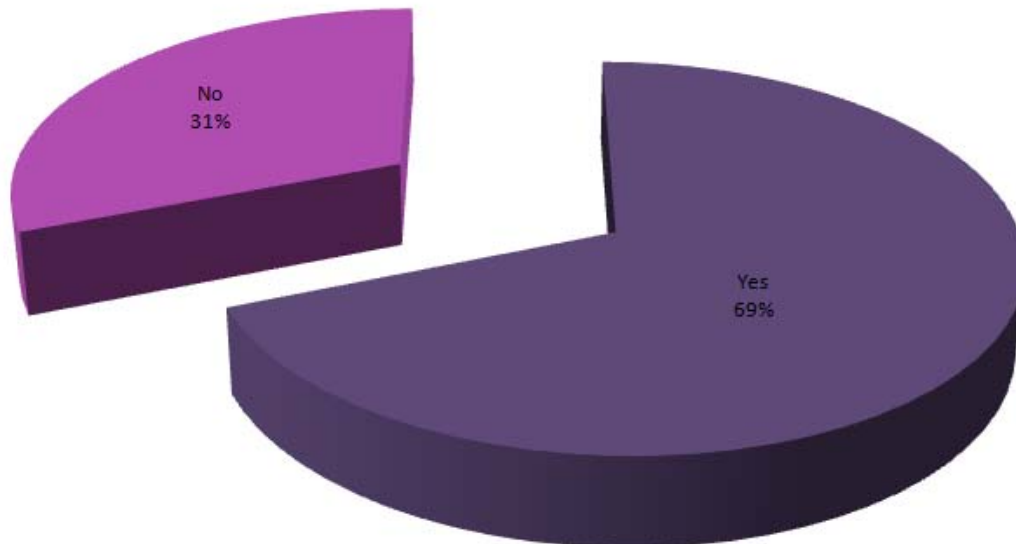


More than the moiety of the interviewees would use the personal recommendation, 19% would ask local colleges and 11% would ask local universities or professional bodies. Just 2% of the interviewees would use trade unions to get information and 6% of the entrepreneurs would choose a different information source.

Other information source mentioned:

- Self study (one answer)
- Chamber of trade (one answer)

Question 28: Have you or do you or your staff undertake any training to increase their professional skills?



The evaluation of question 28 shows that the majority (69% of the interviewee) does undertake any training to improve its skills.

Question 29: If yes, was/is this

	Total value	%
A one off to meet a specific need	11	48
On an ad hoc basis	5	22
A regular occurrence to maintain currency/fill skills gaps	7	30
As part of a ongoing programme of CPD within the business	0	0

Question 30: Again, if 'Yes' was this

	Total value	%
Informal training delivered 'on the job'	9	36
Formal training delivered 'in-house' by your organisation to its staff	5	20
Formal work based training delivered by a college or university or other training provider	3	12
External training delivered at a college or university or other training provider	8	32

Question 31: How many staff have received the following training in the last 12 months?

	Total value	%
Informal training delivered 'on the job'	42	53
Formal training delivered 'in-house' by your organisation to its staff	17	21
Formal work based training delivered by a college or university or other training provider	7	9
External training delivered at a college or university or other training provider	14	18

Question 32: If you or your staff do not take part in training was/is this because

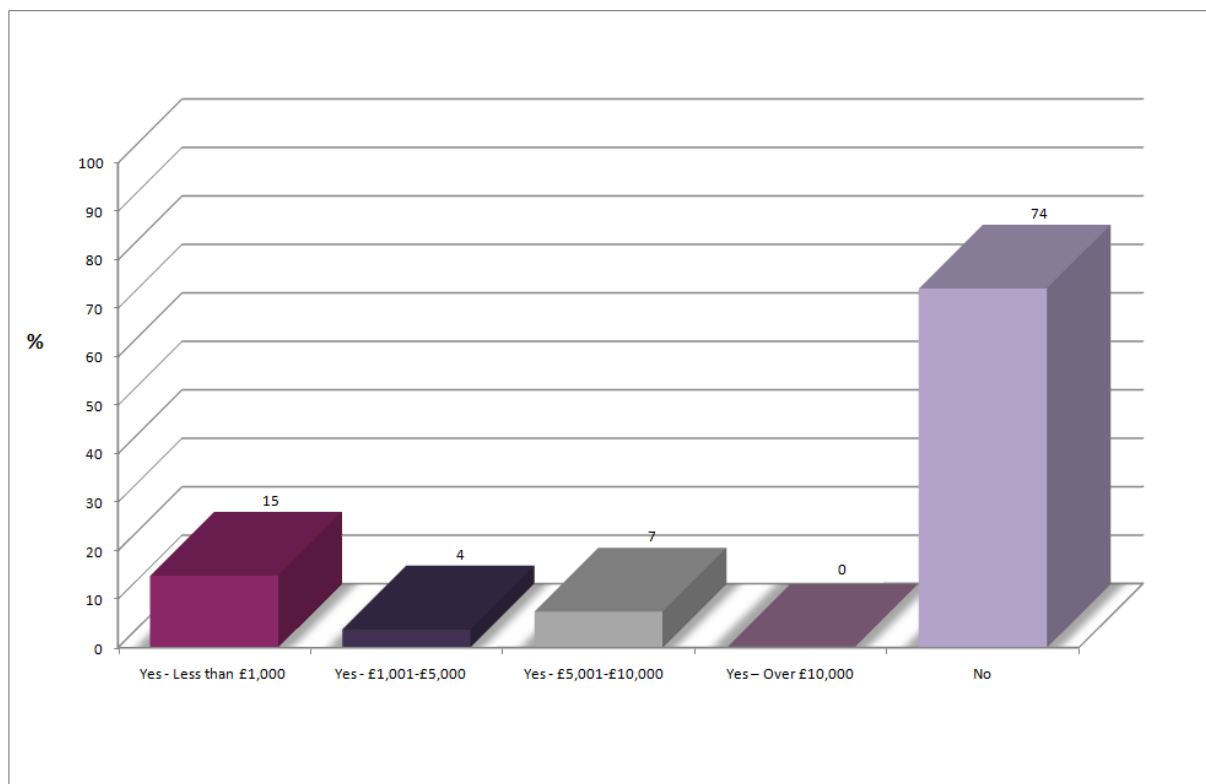
	Total value	%
You or your staff are already fully proficient	4	6
You or your staff are not keen to participate in training	1	2
There is high labour turnover at your establishment	1	2
Your business lacks the funds for training	15	24
There is not enough time for training	13	21
There is a lack of cover for training	12	19
Training is not considered to be a business priority	1	2
No appropriate training is available in terms of subject area	6	10
No suitable training is available in terms of mode of delivery (e.g. part-time, flexible or short course)	7	11
Training is available but not at the right level	3	5
Other – please specify	0	0

Comments: no comments

Question 33: On average, how many days do staff each spend on any type of training/development in a year?

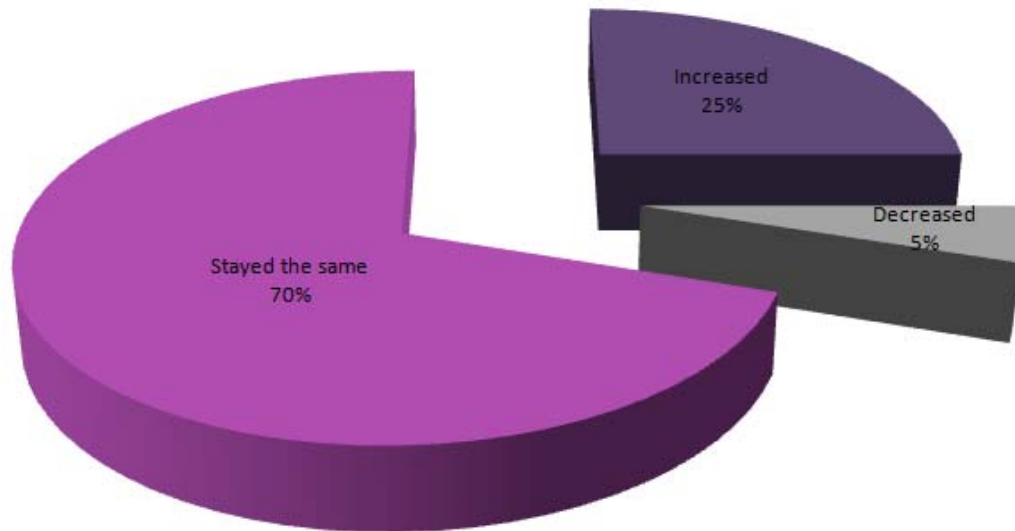
	Total value	%
0 days	1	4
1-2 days	2	8
3-4 days	5	20
5-7 days	4	16
8-10 days	6	24
11-15 days	3	12
16-20 days	2	8
21-30 days	0	0
31-40 days	0	0
40+ days	2	8

Question 34: Do you have a dedicated budget for training?



The bar chart indicates that the majority (74%!) of the interviewees do not have a budget for skill development. That makes the impression that the entrepreneurs in the creative industry have scarce resources. Of the 30 entrepreneurs who were queried none had a budget which was higher than 10.000 pounds. 15% of the entrepreneurs of those who were interviewed have a budget which smaller then 1.000 pounds. 4% of the people had a budget between 1.001 and 5.000 pound and 7% of the people had a budget between 5.001 and 10.000 pounds.

Question 35: Has this increased or decreased over the last 3 years?

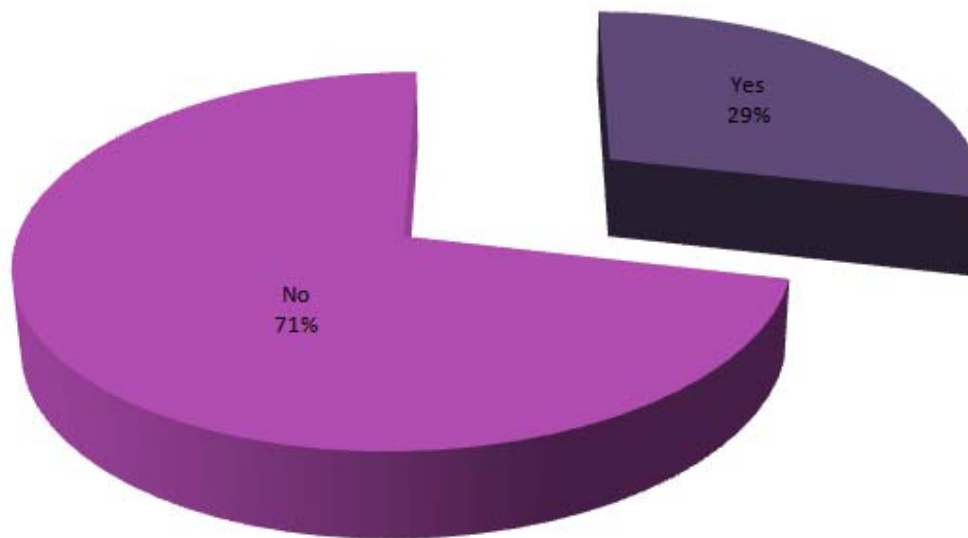


70% of the interviewees stated that the dedicated budget for staff training has stayed the same over the last three years. One quarter of the entrepreneurs have increased their budget and 5% has decreased their budget.

Question 36: To what extent does/would your organisation provide the funding for external training programmes?

	Total value	%
Fully	10	33
Partly, with funding from another organisation	7	23
Partly, with employee	5	17
Not-at-all – employee funds	1	3
Not-at-all – funding comes from another organisation	3	10

Question 37: Have you ever accessed funding for training?



71% of the interviewees stated that they have never accessed funding for training. Just 29% of the entrepreneurs have accessed funding for skill development.

Question 38: If 'No' what are your main reasons for not accessing available funding?

	Total value	%
Unsure how to	8	35
Don't qualify	4	17
Too difficult to apply	7	30
Don't have time to apply	3	13
Other (please specify)	1	4

Other:

- not sure about the afford (immaterial costs) and the results

Question 39: From which, if any, of the following sources have you applied for funding?

	Total value	%
Neither	19	63
Other (please specify)	5	17

Other:

- department of trade and industry
- industrial union
- chamber of industry and commerce
- credit bank for the middle class

Question 40

No crosses made. Just comments.

Comments:

- To find competences and interest and boost it.
- Consumer behavior and handling of new media and media
- bad education
- Internationalization /Online-Work-Sharing
- The rapid development of the internet makes it very hard to keep updated. The growing specialization at technical questions makes it necessary to pay other companies to do this work.