4H-CREAT project

“Quadruple Helix to Stimulate Innovation in the Atlantic Cultural & Creative SMEs”

Survey Report on the identification of R&D trends and needs for Atlantic Cultural and Creative Industries (CCIs) towards Generation Z habits and demands

Drafted by:	
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Contents

A. INTRODUCTION

The present report has been drafted in the framework of the 4H-CREAT project, co-financed by the Interreg Atlantic Area Programme (2014-2020) of the European Union.

4H-CREAT aims to generate transnational knowledge transfer models to enhance the sharing of RTD results from research institutions to the Cultural and Creative Industry (CCI) SME's by developing innovative products through a transnational Quadruple Helix cooperation approach (end-user involvement and co-design). It plans to identify new products and services orientated to the new trends in market demand (i.e. Transmedia), by exploiting of the digital technology and economy.

The 4H model puts innovation users at its heart and encourages the development of innovations that are pertinent for users (civil society). Users/citizens will drive the innovation processes. In parallel, the project contributes to the implementation of measures designed to nurture the spill-over effects of CCI's on the wider economy & society.

4H-CREAT project is promoted by the following transational partners, under the leadership of Glasgow Caledonian University:

1. Glasgow Caledonian University (Scotland – UK) – Lead partner
2. Cámara Oficial de Comercio, Industria y Navegación de Sevilla / Seville Chamber of Commerce (ES)
3. Technopole Quimper-Cornouaille (FR)
4. Laval Mayenne Technopole (FR)
5. Limerick Institute of Technology / Institiúid Teicneolaíochta Luimnigh (IR)
6. ISCTE – Instituto Universitário de Lisboa / University Institute of Lisbon (PT)
7. Fundación Municipal de Cultura del Ayuntamiento de Avilés / Avilés City Council – Municipal Foundation for Culture (ES)

Among its activities, 4H-CREAT promotes the exchange of knowledge and cooperation with the aim to elaborate a diagnostic of the current Atlantic Area market situation towards the demands of Generation Z consumers, in order to identify niches of innovation opportunities for CCIs, especially in cooperation with public and private support organisations.

In that framework, partner 2 (Seville Chamber of Commerce) has been in charge of the present "Survey Report on the identification of R&D trends and needs for Atlantic Cultural and Creative Industries (CCIs) towards Generation Z habits and demands".

4H-CREAT highlights the involvement and participation in co-design of all the members of the creative value chain, including the final users. In this framework, we can mention some previous studies such as "Hidden Innovation in the CCIs" (NESTA, 2008) or "Mapping the creative value chains" (European Commission, 2017), that have served as a reference to this project.

To elaborate a diagnosis of the current market situation, we have carried out a series of surveys (established in the Methodology section) covering the following geographical areas included in the Interreg Atlantic Area programme:

COUNTRIES AND AREAS

Figure 1. Regions covered by the Interreg Atlantic Area Programme

SPAIN

- Galicia
- Principado de Asturiass
- Cantabria
- País Vasco
- Comunidad Foral de Navarra
- Andalucía (Huelva, Sevilla y Cádiz)
- Canarias

FRANCE

- Haute-Normandie
- Basse-Normandie
- Pays de la Loire; Bretagne
- Poitou-Charentes
- Aquitaine

PORTUGAL

- Norte
- Algarve
- Centro (PT)
- Lisboa
- Alentejo
- Região Autónoma dos Açores
- Região Autónoma da Madeira

IRELAND

- Border
- Midland and Wester
- Southern and Eastern

UK AND SCOTLAND

- Cumbria
- Greater Manchester
- Lancashire
- Cheshire
- Merseyside
- Gloucestershire
- Wiltshire and Bristol/Bath area
- Dorset and Somerset
- Cornwall and Isles of Scilly
- Devon
- West Wales and The Valleys
- East Wales
- South Western Scotland
- Highlands and Islands
- Northern Ireland

B. OBJECTIVES

Currently, we are immersed in a dynamic, inconstant, and metamorphosing world where information spreads faster than ever. Thus, one of the main challenges of the companies and institutions is to adapt themselves to survive in an economic jungle empowered by internet-based media in which civil engagement generates revolutionary impacts on the paradigms of information diffusion and tendencies.

This joint research is part of the "Development of transnational knowledge" Work Package (WP) of 4H-CREAT, and complementary to Action 1 of such WP, that of the 4H-CREAT project, that broadly analysed the "Generation Z" related niches and opportunities. Such action took into account that all existing members of the triple helix model (the CCIs SMEs producing goods and services; the public institutions in charge of cultural seasons or economic development; research institutions generating new knowledge and technologies, etc.) need to better focus their cooperation and work according to the new niches of audience, in particular linked to the consumption of cultural products through ICT.

In particular, the present report analyses more in depth "Generation Z" specific needs and gaps in the Atlantic Area, through an active participation of the youngest generation in the process, in order to identify new innovation opportunities based on the specific demand of this target group of consumers.

From the evolutionary economic perspective, it is suggested that the economic growth and knowledge transfer can be facilitated by new generations with other digital thinking and strong wishes of changing the world, converting it in a more sustainable and transparent society. The 4H model puts users at the heart of innovation and encourages the development of new products and services that are pertinent to the civil society. In this way, citizens drive the innovation processes. In that framework, a general goal of 4H-CREAT is thus to develop transnational knowledge transfer models enhancing the transmission of RTD results from research institutions to the CCI SMEs in order to develop innovative products through cooperation approaches (end-user- involvement & co-design).

In that framework, the present report pretends to support the planning to better align R+D carried out by the industry and/or research centres with the needs of "Generation Z" potential consumers.

Among other objectives, the result of the different surveys should create some joint orientations and a roadmap towards the development of new products and services.

General objectives:

To carry out a diagnostic and exhaustive analysis about the necessity of creating new business models, process and technological trends of all the companies and institutions that belong to the creative and cultural industries field to adapt the demands of Z Generation niche market.

Specific objectives:

- ✓ To promote cooperation between public, private and research actors
- ✓ To examine the tendencies and tastes of Generation Z niche market within the Atlantic Area participating territories
- ✓ To identify and promote measures designed to nurture the spill-over effects of CCIs in the broader economy and society
- ✓ To promote user-led innovation
- ✓ To reduce the gap of tech transfer and improve products and services
- ✓ To stimulate innovation for CCIs SMEs
- ✓ To promote research activities more orientated to the need of the consumers and companies
- ✓ To identify Strengths, Weaknesses, Opportunities and Threats around Atlantic Area CCIs economic actors towards their adaptation to Generation Z demands

C.METHODOLOGY

This report has been drawn up from wide range of information sources, mainly through the gathering of primary data. The term of execution of its production has been of around eight months (May-December 2018).

Specifically, the gathering of information has been in two phases:

a) A first approach to the reality of Generation Z through the collection and analysis of existing documentation (secondary data), including qualitative and quantitative sources and desk research for the international benchmark to elaborate and design the survey. This information has been completed by interviews (first-hand information) with Generation Z members to better identify their habits and focus the questionnaire.
b) In the second phase, gathering of quantitative and qualitative information through the distribution of questionnaires.

Consequently, surveys have been focused on three target groups within NUTS II territories belonging to the European Atlantic Area: Generation Z (teenagers between 12 and 20 years old); CCIs; and Public and Private Institutions belonging to or supporting the creative and cultural sector.

The survey was drafted with four kind of questions:

1) Dichotomous ones (mostly affirmative or negative close-ended questions)
2) Multiple choices ones, to select one or many responses from a given list of options
3) Multi-select matrix table questions
4) Open ones (free texts, for more qualitative purposes).

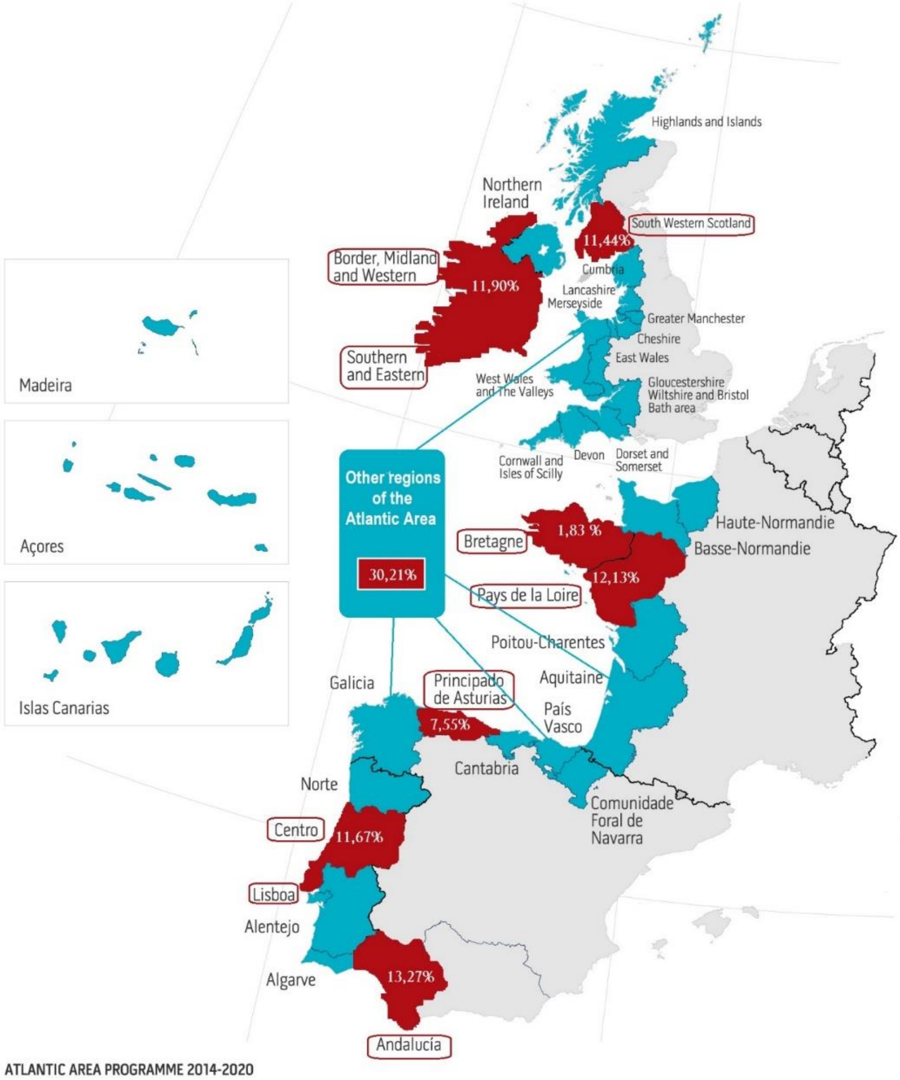
The sample collection took place between May and October 2018, with the active participation of 4H-CREAT partners, in charge of the distribution of the questionnaires within their respective territories.

A total sample of 464 answers from Generation Z and from 130 CCIs was obtained. On the other side, the number of answers obtained from third institutions and organisations was a more reduced sample (only 28 participants), in accordance with the 4H-CREAT partners possibilities and preferences. The margin of error was of 95%.

TARGET GROUP: Young people (between 12 and 20 years); Managers of cultural and creative industries and responsible or technicians of the cultural institutions, support organisations and R&DI centres from the Atlantic Area.

GENERATION Z PROFILE ANALYSIS

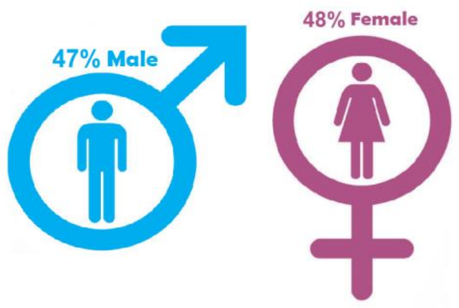
Figure 2. Map of regions included in the report (with % of answers received)



N (gz) = 464

The N(gz) size sample includes 464 young European people that belongs to "Generation Z." The research sample provides responses about leisure, culture and consumer patterns in European countries of the Atlantic Aea. 69,79% of the sample belong to the following five countries and seven regions of the Atlantic Area: Spain (Asturias and Andalucía), Portugal (Lisboa and Centro of Portugal), France (Pays de Loire and Quimper), Ireland (Limerick) and Scotland (Glasgow). The remaining percentage (30,21%) live in other regions of the Atlantic Area.

Figure 3. Gender distribution of Gen Z sample obtained



The gender distribution of the sample obtained is well balanced, achieving 47% of males and 48% of females (the remaining 5% is due to the "no reply" answers)

Figure 4. Age of Gen Z sample

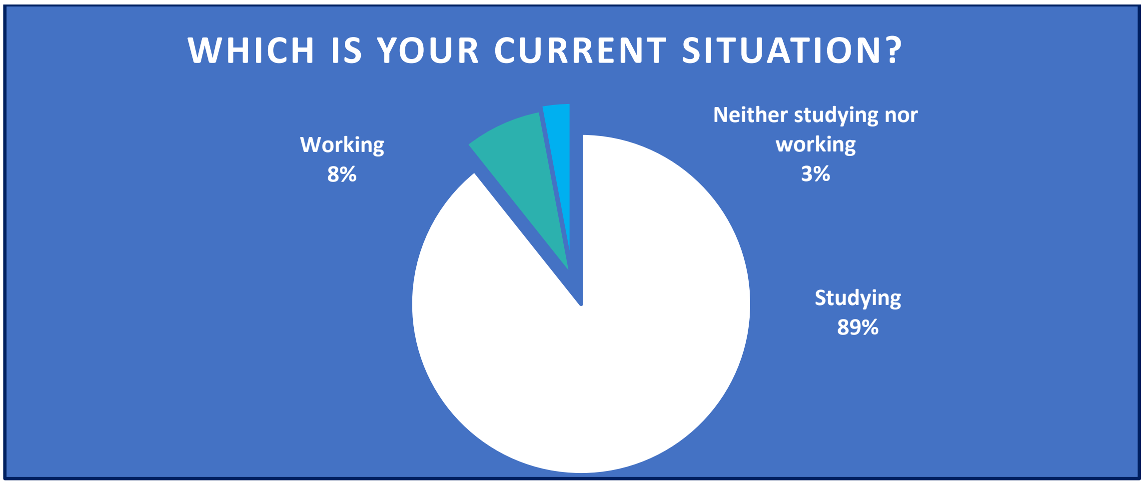
The sample covers teenagers between 12 and 20 years old.

However, as we can observe in the table, almost half of the answers (48%) belong to young people older than 18 years old (easier to reach for the partners and for data protection related issues);

- 16% from young people in their 20s
- 20% were 19 years old
- 12% were 18 years old
- The remaining 52% were under 18 years old

Age	Percentage
12	5%
13	3%
14	5%
15	9%
16	13%
17	12%
18	12%
19	20%
20	16%

Figure 5. Current situation of the Generation Z sample



As far as profiles of Generation Z participants is concerned, a vast of majority (89%) were studying, against 8% who were working, and 3% of "NEETS".

Among them, 58% studied in a public institution; 21% in a private institution and 14% in a public-private educational institution.

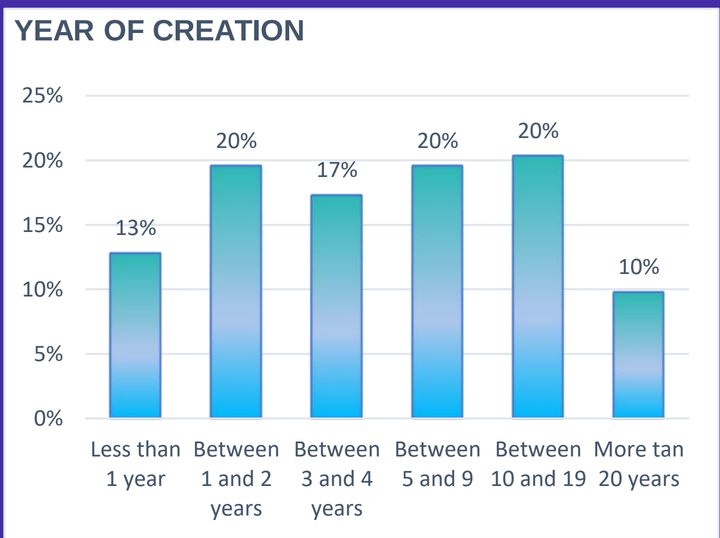
In this aspect, we can highlight **that almost 60% of the participants in the survey are studying in a Public Educational Institution or doing a training course in a Public Institution.**

COMPANIES PROFILE

Figure 6. Distribution of the Companies´ sample per countries

The larger companies (between 100 and 250 employees) belong to the video games sector.
The vast majority (72%) of the companies are micro-companies and fit in a wide diversity of sectors, while the few companies with between 5 and 30 employees belong to the digital arts, animation, architecture and industrial design and theatre subsectors.

Figure 8. Year of company´s creation

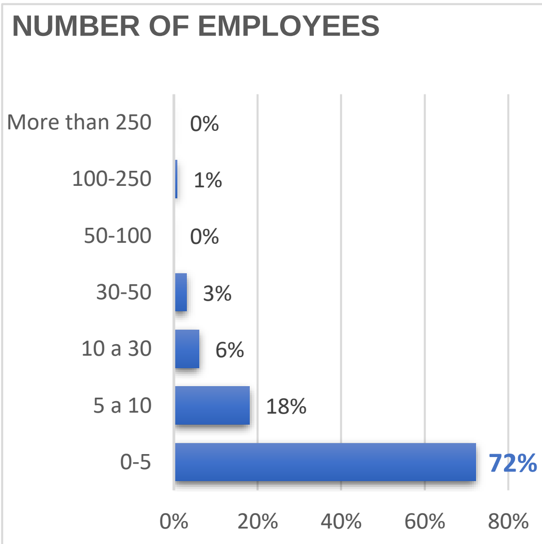


The companies' sample in this survey includes 130 companies headquartered in the following five countries, and distributed as follows:

- Ireland (7%)
- Scotland and UK (13%)
- France (19%)
- Spain (33%)
- Portugal (28%)

From a subsectorial perspective, we have to highlight that that 73 companies belong to the "digital sector", against 42 that belong to the "traditional sector" (such as crafts, theatre, etc.), 15 belongs to "other" fields or activities that can fit in both categories.

Figure 7. Number of employees



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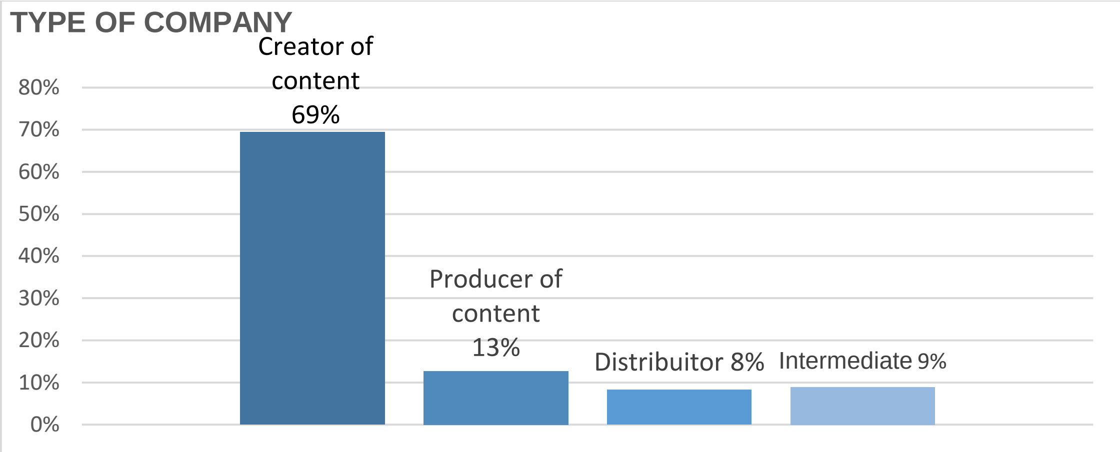
33% of the companies are start-ups and have been created less than 2 years ago.

Figure 9. Type of company (position in the creative value chain)



In order to fully interpret the answers, it is also important to take into account the role of the participating companies within the value chain (creators of conents, producers, distributors or intermediaries). This is particularly important to understand their potential in terms of cooperation, in particular towards joint-innovation processes or the generation of new products. The report "Mapping the creative values chains" (European Commission, 2018) mentions that creators still need intermediary organisations to bargain and to build a reputation. In this line, distributors need intermediates to get access to good quality cultural content.

Still, 82% of the companies are either producers or creators of content; the vast majority belong to sectors related with creativity and design such as gaming and animation, video games, graphic design, architecture, fashion design, or fine arts. Other digital companies work in advertisement, virtual reality or App development.

The intermediate companies (9%) come more from traditional sectors such as publishing or theatres. Finally, with a lower rate of participation (8%), distribution companies include mostly the ones linked to events and music.

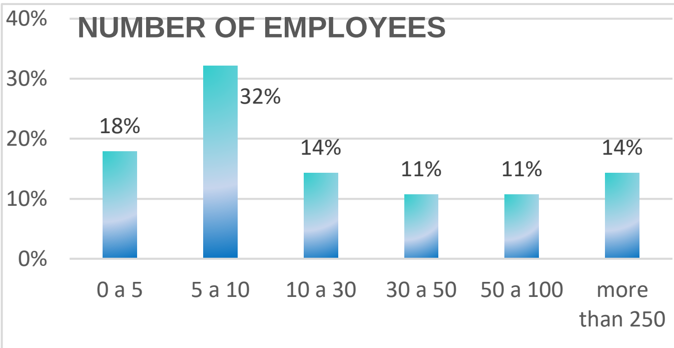
INSTITUTIONS AND ORGANISATIONS PROFILE

Figure 10. Map of research responses sample from Institutions and organisations

As stated, a reduced sample of answers has been collected from institutions and organisations (some 28).

The previous map shows their geographical distribution per country, though they would come mostly from the partners regions

Figure 11. Number of Institutions employees (percentage)



Half of the organisations (50%) - such as business associations and scientific parks – are relatively small ones, with 10 or less employees.

The group of institutions that have over 250 employees are academic ones (Universities)

Figure 12. Average of creative and R+D+I employees

D. GENERATION Z

WHAT IS GENERATION Z?

Generation Z are also called "Post-millennials" or "Centennials", it is formed by young people born in the digital era. Demographers and researchers typically use the mid-1990s to mid-2000s as starting birth years, though there is little consensus regarding ending birth years. Within the timeline of this report, their age covers a wide range of years, between 12 and 22 years old. They have grown with Internet and have an intrinsical and innate technological skill. These young people feel "ready and prepared to change the world". They do not believe in old generations and institutions. They are committed to institutional transparency and to empower small entrepreneurs and citizens against the excessive giants that dominate the globalisation world. They form a gathered society, sensitive to the environment, pollution and climate change. They are young people with fixed values looking for companies with similar values. They do not want to commit the same mistakes than their ancestors, however, they are subject to high uncertainty, volatility, and financial instability. In that sense, Generation Z members are excellent savers. Generation Z loves diversity, and they are characterised by their tolerance and faster response and habits in social networks.

LEISURE AND LIFESTYLE

Mobility and change are part of young people daily lives. Labour and emotional instability are ubiquitous in modern life. Leisure patterns and lifestyle are very different from their parents and grandparents. They live in a digital society and immersed in a multi-channel paradox. On one hand, young people are digitals, with many virtual contacts at international level, but on the other side, they sometimes feel alone in the real world.

Young people hardly watch TV; however, they do play online games with people from different parts of the world. They spent some time listening to music, and they are not excited about traditional cultural activities. They are festivals lovers, and like mass and mainstream culture. Generation Z is digitally hyperstimulated and they are very difficult to convince due to their high grade to access information.

Masters of multitasking or brain illusion? According to Broenmanng, A (s.f:8), many laboratory studies proved that "*people exhibit inferior performance on diverse tasks when they try to manage multiple media sources*". They are more motivated, but they are not more productive. They have short attention and impaired concentration. Vilanoba and Atrevia consulting (2018) mention in their studies five features that characterise Generation Z: five "is" and "cs": Influence & Connection; Immediateness & Short-term (*Cortoplacismo)*; Innovation & Creativity; Irreverence & Contrast; Instability & Change.

SPENDING PATTERNS

Consumer Z choices of products are based on social networks recommendations (Visioncritical, 2016). They appreciate more the quality, functionality and design than the branch. Social networks more commonly used to communicate are Instagram, Snap chat, Youtube and WhatsApp. Among the most frequently downloaded programmes to watch online content highlight Netflix or Youtube. Generation Z always look for the product on Internet before buying online (Amazon, eBay, Etsy) or physically in the shop.

They prefer originality, and they like to co-design the product. The vast majority of the Z users are more inclined to pay more for a faster delivery.

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Seducing them with the customisation of the product and a tailored branding is an important challenge for companies.

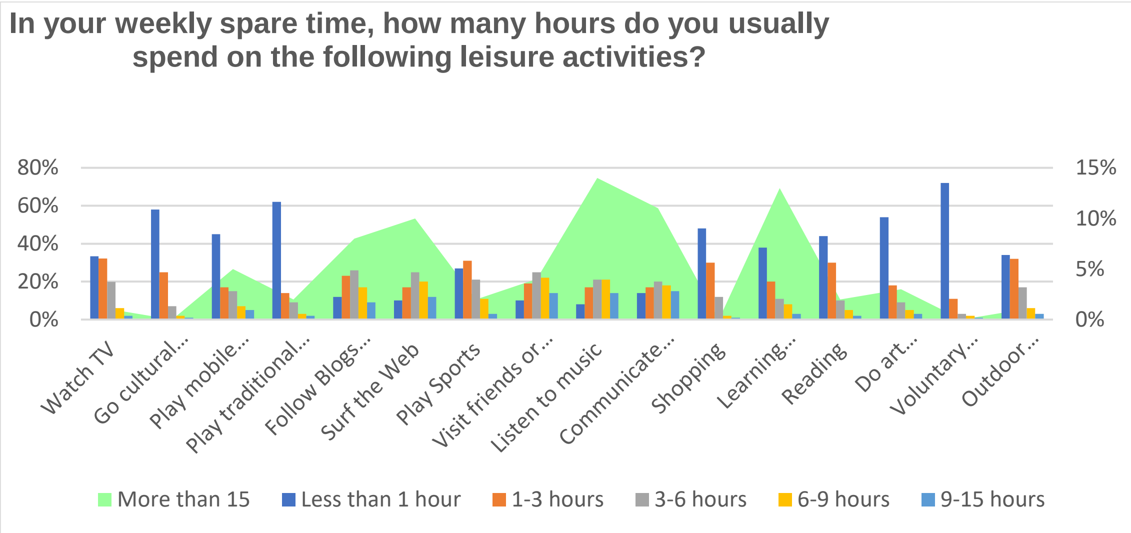
E. GENERATION Z SURVEY RESULTS

This section examines the leisure, cultural and consumption patterns of Generation Z, in order to provide companies and institutions with some more specific information about the perceptions, values, needs and behaviours of younger consumers.

I. LEISURE AND CULTURAL INTEREST

One critical topic is first of all to know how teenagers spend their free time. The following graph analyses the time spent by Generation Z consumers in selected leisure activities, on a weekly basis.

Figure 13. Average hours per week spent in selected leisure activities



While watching TV could be one of the most popular leisure activity across generations, this graph shows the reality among Generation Z consumers: Around 60% of young people would watch it less than 3 hours per week. So, in which activities do Generation Z members spend their leisure time? Top activities are listening to music (14% would listen music during more than 15 hours per week), learning activities (13%) and surfing on the web (10%).

Other leading activities among that profile of consumers are mostly linked to digital consumption and visiting friends: 67% would surf more than 3 hours per week on the web (10% over 15 hours); 65% would visit friends or relatives for more than 3 hours per week (in this case, 4% only seems to spend over 15 hours per week on that activity); and, again linked to Internet, to follow blogs and social networks (60% for over 3 hours per week, 8% over 15 hours).

On the contrary, the less popular activities among teenagers are voluntary ones (72% declare spending less than one hour per week on voluntary services), playing traditional games (62%) and to attend cultural activities (58%).

In this line, the following charts analyse more in depths the "cultural and free-time" activities and habits of Generation Z, taking into account as well the geographical origin of the consumers:

Figure 14. Top 6 spare time activities per country (more than 15 hours per week activity)

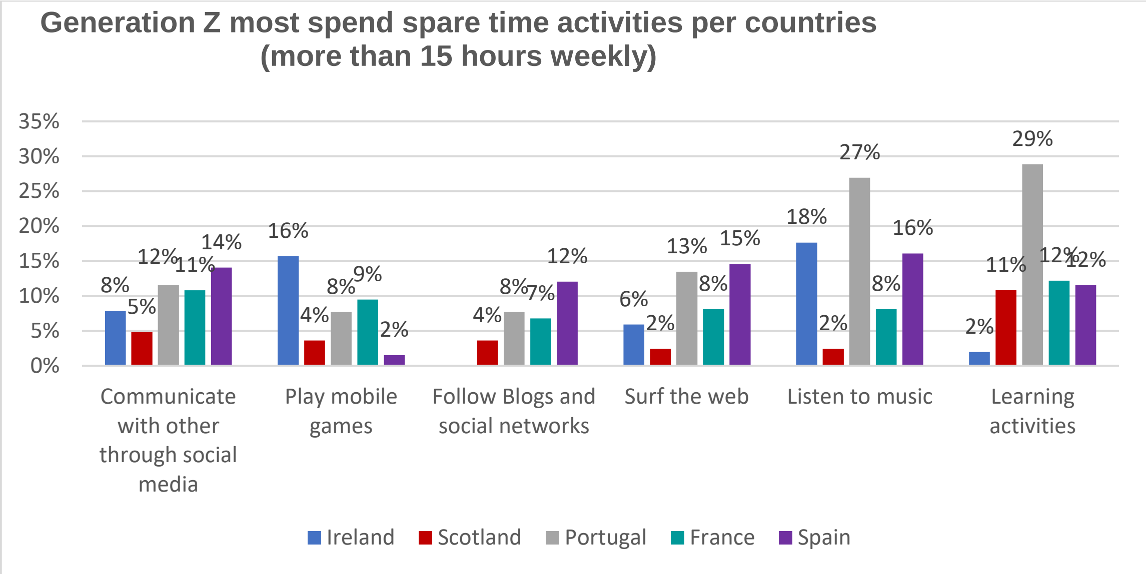
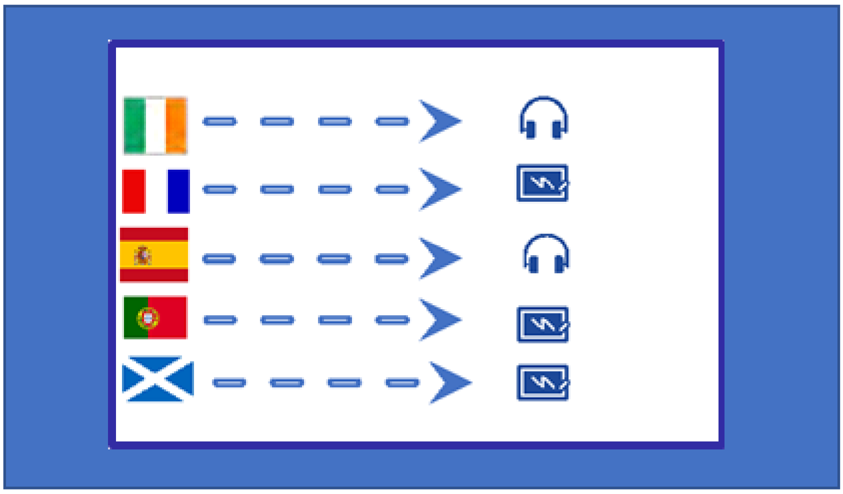


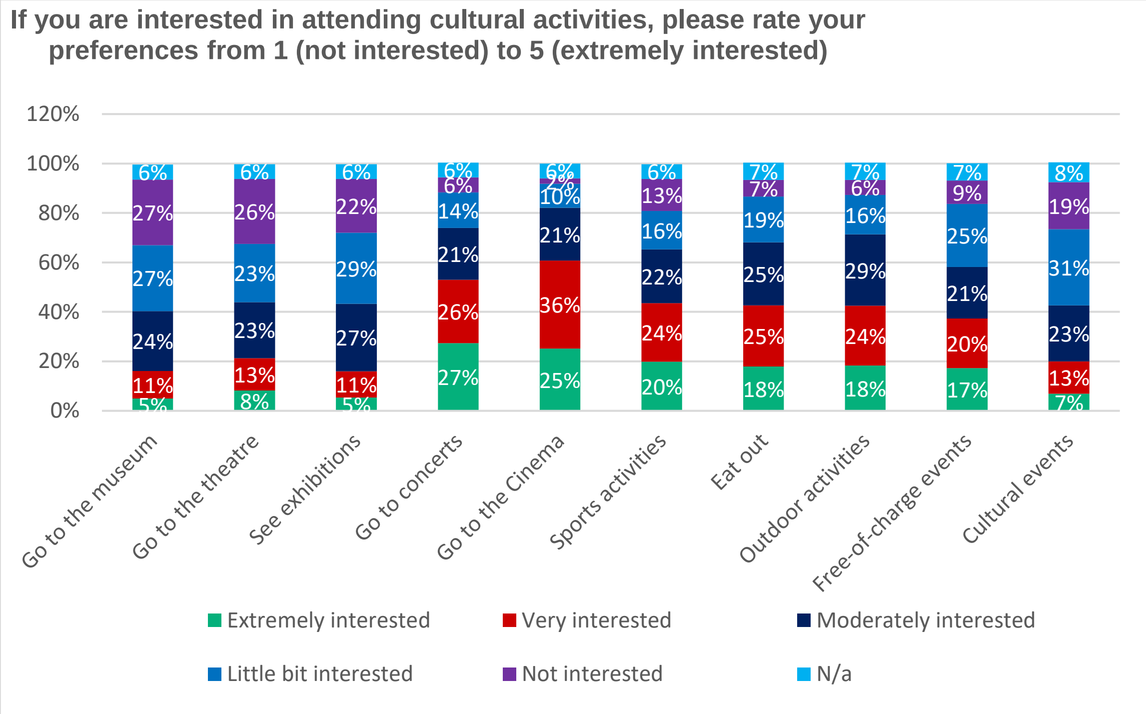
Figure 15. Top spare time activity per country



Independently from the country of origin, within the European Atlantic Area, the most important leisure activities for younger generations are listening to music and participating in learning activities. Taking into account the fact that most of the music is listened through mobile devices, and the growing interest of e-learning activities, as well as the fact that most of the other "Top 6" activities are linked to digital consumptions (Social networking, gaming, surfing on the web, etc.), the data confirms the fact that Generation Z is particularly interested in digital products and services.

As far as "traditional cultural and artistic" activities are concerned, ranking them from 1 to 5, the bar chart below underlines that the most interesting leisure activities for teenagers are going to cinema (61% are extremely or very interested) or to concerts (53%). Other leisure activities of interest are the ones related to sports activities (44%), eating out with friends (43%) or outdoor activities (42%)..

Figure 16. Level of preferences per leisure activity

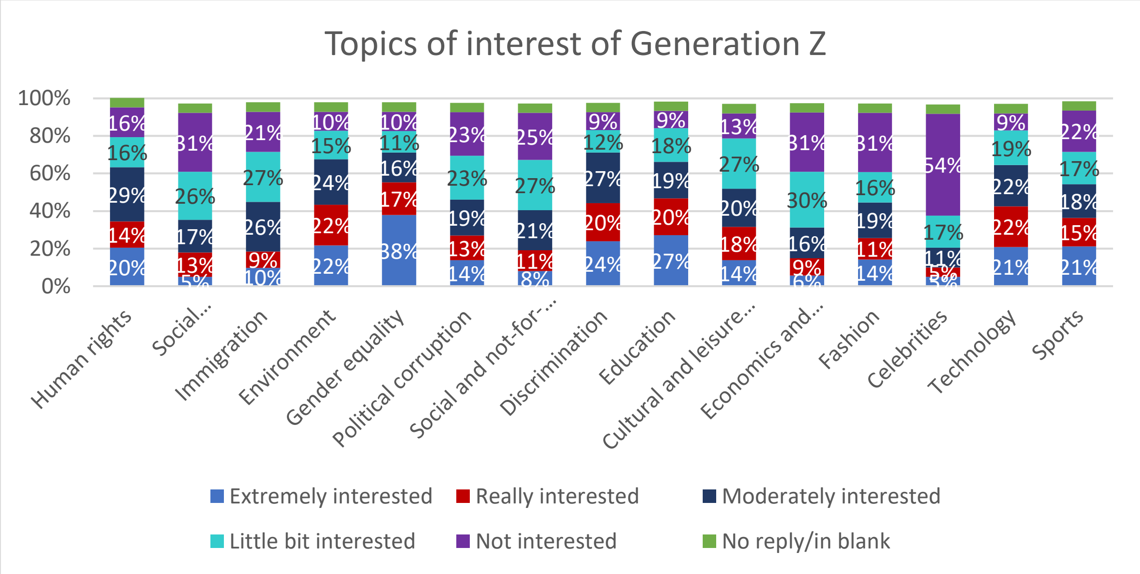


However, the survey confirms that teenagers from the EA area do not show much interest in going to museums or exhibitions (only 16% would be extremely or very interested), nor to the theatre (21%) or cultural events in general (20%).

Digital consumption is not the only reason to the lack of interest of younger generation to cultural activities. To better understand them, it is also important to take into account which are their key subjects and values of interest, and what factors might make culture less accessible to Generation Z members.

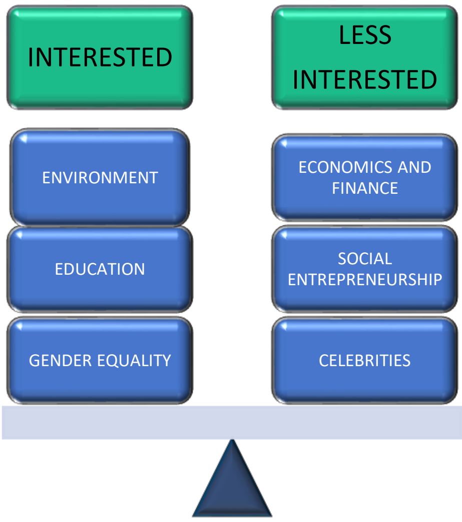
The following pages and charts bring some valuable information on such issues, including the knowledge and habits towards their surrounding cultural offer.

Figure 17. Topics of interest rate of Generation Z sample



In line with Vilanova (2018) report about Generation Z, the survey confirms that young people from the EA area's key topics of interest are linked to issues affecting our society, above all: Gender equality (55% extremely or really interested), Education (47%) and Environment (44%). Human rights and Technologies are also topics of interests, while young people seem to have less interest in issues such as Economy or Celebrities.

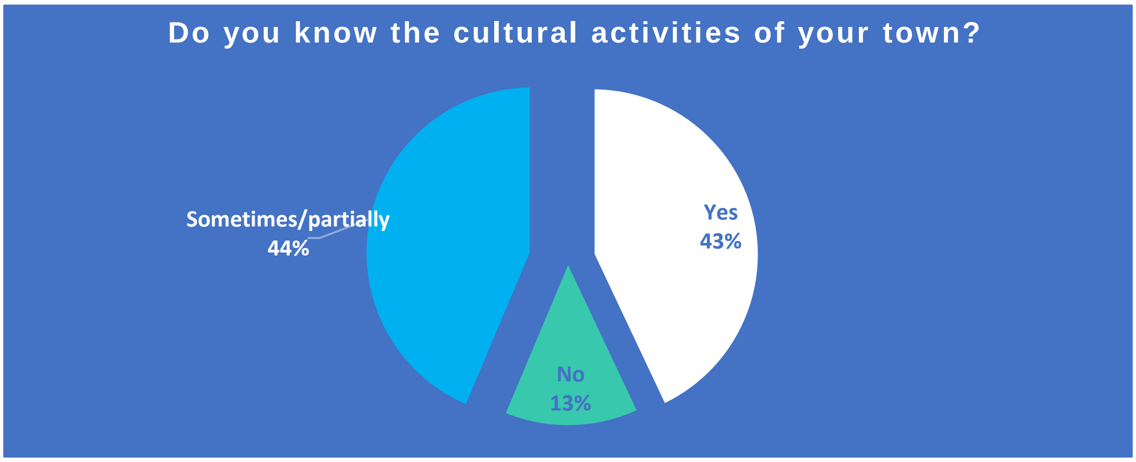
Figure 18. Topics of interest



CULTURAL ACTIVITIES

If young people do not attend that much or are not so interested in cultural activities, we might think that it is due to a lack of knowledge of the offer. However, the following data show that it is not really the case.

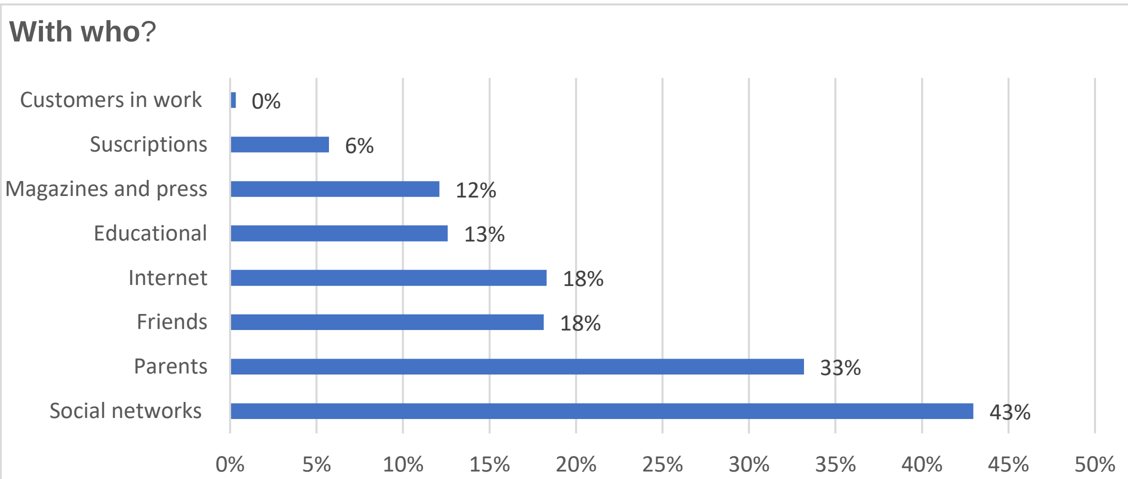
Figure 19. Knowledge of the local cultural offer



87% of Generation Z consumers either know or partially know what cultural activities take place in their town: Half of them (44% of the total participants) do know them well, while the other half (43%) would be aware sometimes or partially of which cultural activities are taking place, where and when. In that sense, only a minority (13%) do not know it. Therefore, we could affirm that, if teenagers are not interested in culture, it is not because they do not know the offer in their town.

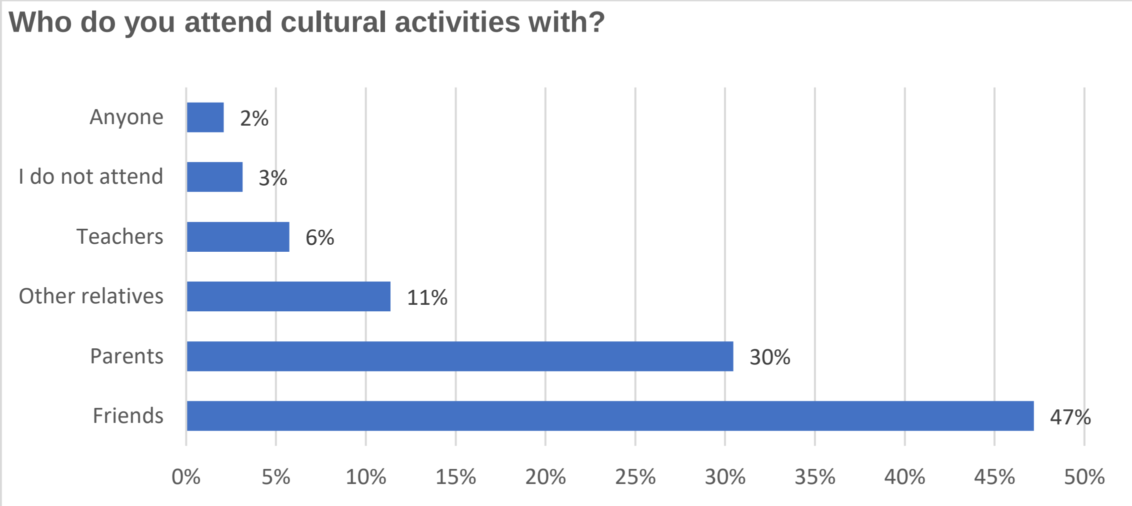
In fact, the digital habits of Generation Z do contribute in such knowledge:

Figure 20. How Generation Z consumer know the cultural activities of their town



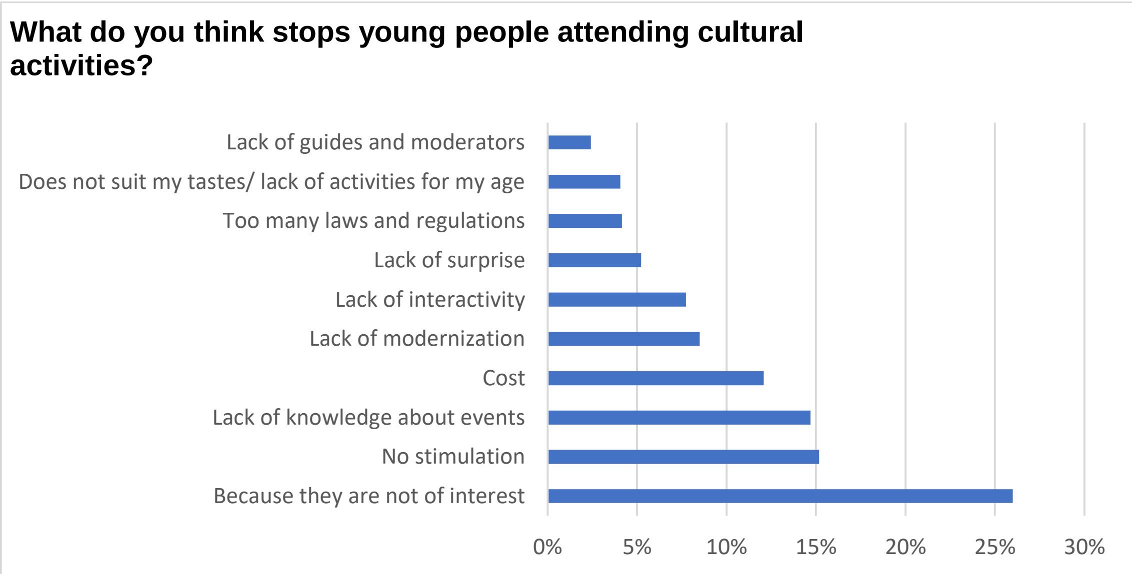
Social networks are the most common communication channel among young people. 43% of the survey sample use social media to learn about cultural activities (and 18% would learn about them through Internet, as well as through “friends”, which often means, again, through digital communication). It is interesting to see that parents are also another common and trusted channel used by this generation with a total of 33% answers. On the opposite, it doesn't seem that young people subscribe to newsletters and alerts to be informed about cultural activities.

Figure 21. Assistance to cultural activities with family, friends or others



Around the half of the responses underlines that teenagers prefer to go to cultural activities with their friends (47%), followed by parents with a high percentage (30%) and other relatives (11%).

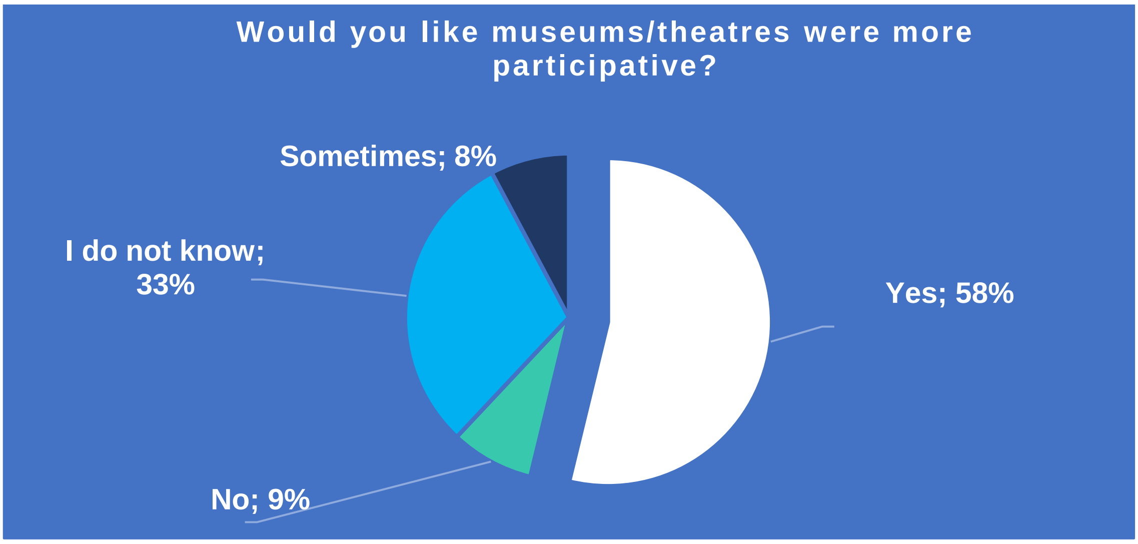
Figure 22. Factors that stop young people attending cultural activities



There is a clear lack of interest and stimulation for young people to attend cultural events. Such answers represent, together, 38% of the reasons that "stop" them. Despite the previous figures, there is also a need to better inform about events taking place (15% of participants declare a "lack of knowledge"), and the costs are also considered as an important barrier (12%).

Among other answers received, young people also consider that cultural activities could be more modern, interactive and/or surprising. In that sense, participants were also asked if they would like some traditional cultural institutions (e.g. museums and theatres) to be more participative, and clearly answered "Yes":

Figure 23. Would you like museums/theatres to be more participative?



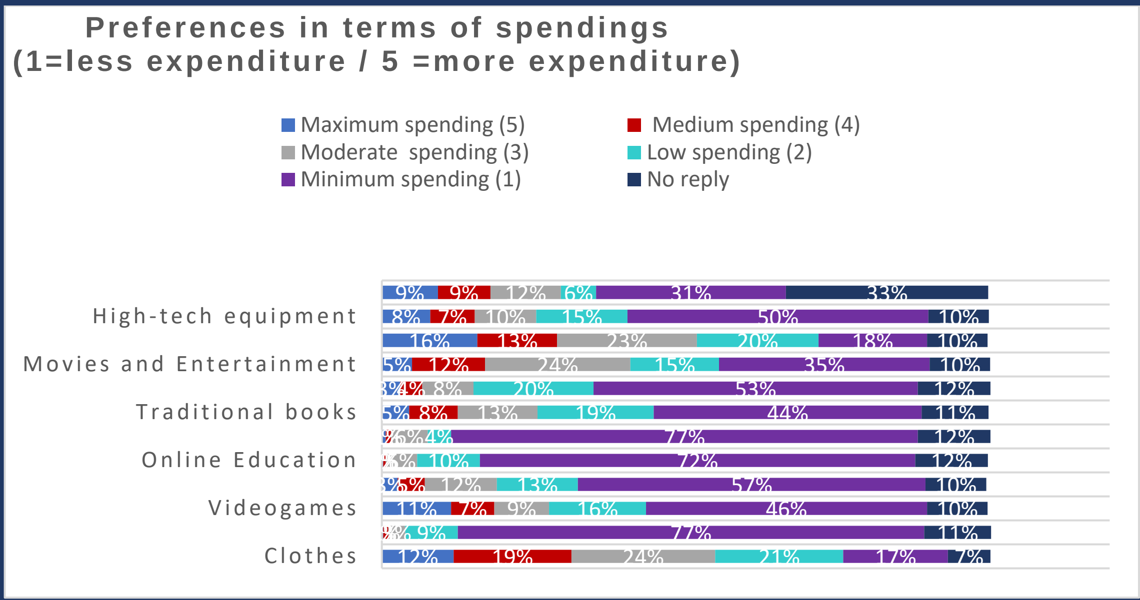
More than half of the sample research mentions that museums and theatres should be more participative, precisely, 58% of Generation Z consumers, 8% consider that such kind of more participative approach should be adopted in certain cases (sometimes).

Probably due to their lack of interest in such kind of traditional cultural activities, a quite large percentage of answers (33%) just do not have any idea or opinion about this matter, while only 9% consider that these cultural institutions/activities are participative enough.

> **58% of Generation Z consumers would like museums and theatres to be more participative**

II. SPENDING PATTERNS

Figure 24. Preferences to buy



In accordance with Generation Z consumption patterns, the bar graph confirms that young people preferences in terms of spending their money would be for clothes (31% of high or medium spending), travelling (29%) and videogames (18%). In that framework, it is important to underline that there are some slight differences among the answers and consumption patterns for clothes and video games from a gender perspective: 78% of the answers linked to buying clothes are female (against 22% of male). On the contrary, as far as videogames products are concerned, 83% of the buyers of game products are male (against 17% of female).

On the opposite, toys; e-books; jewellery; traditional books; applications and software and high-tech equipment are not among their basic needs or investments.

Figure 25.: Favourite products bought by Z consumers (high spending)

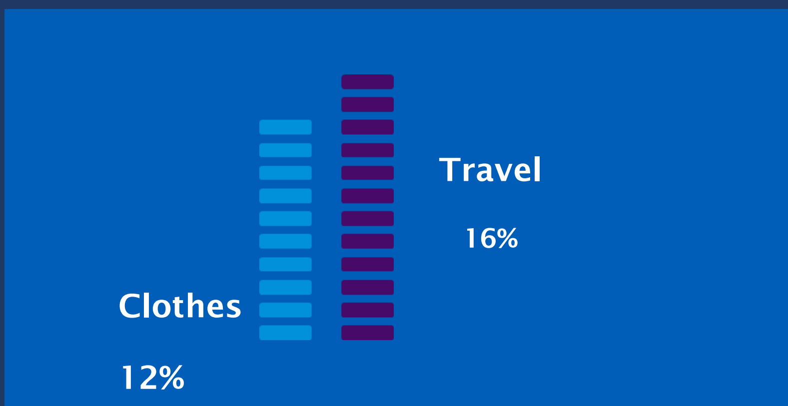
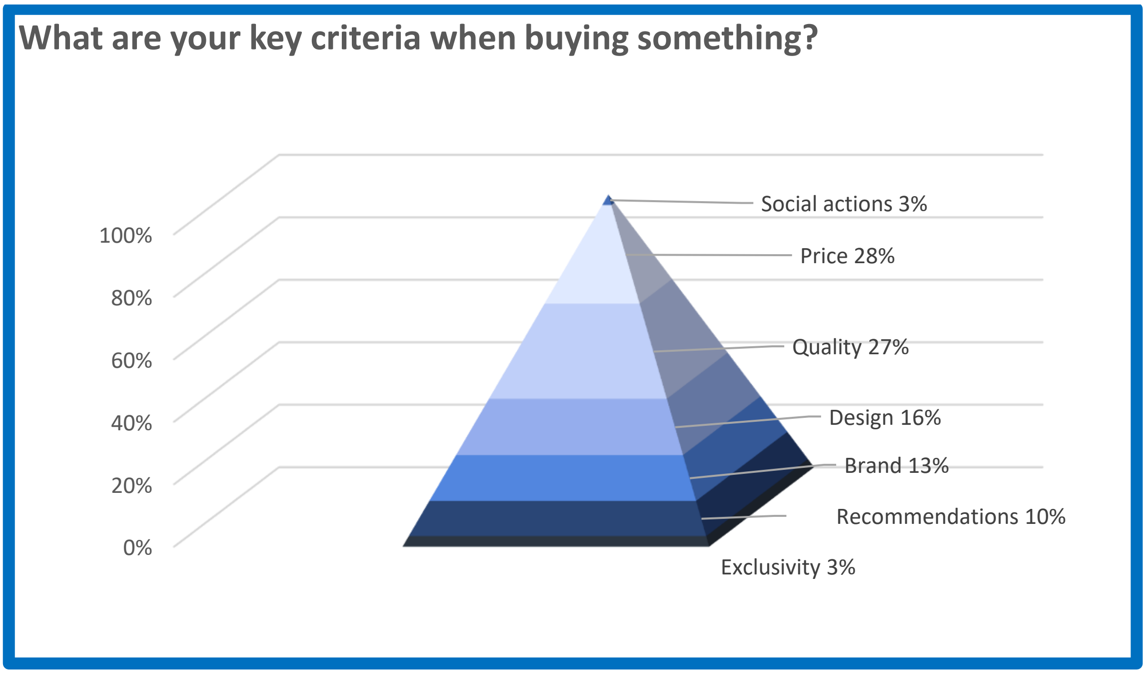
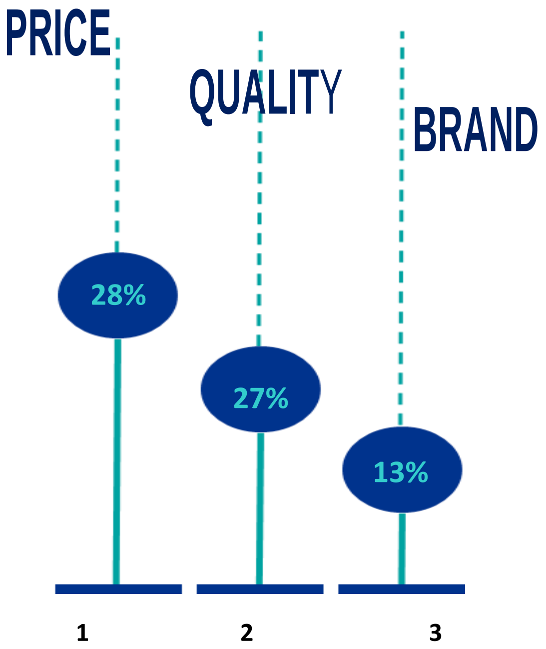


Figure 26. Criteria to buy something



In this context, Z consumers criteria to purchase products and services from companies are first of all the Price (28% of answers) and Quality (27%), followed by their Design (16%) and Brand (13%). However, they do not care too much about exclusivity, nor about the company´s social actions and commitment (despite their manifested interest on social issues).



"Z consumers want the typical and ideal sentence of the three Spanish "B's" "Bueno, Bonito, Barato" (Good quality, Nice & Cheap).

Can CCIs achieve such expectatives?

Around the same point of spending patterns, but orientated to quantity of money, the following figure brings some interesting demo about how Generation Z consumers tastes, showing what they would do with some extra money available:

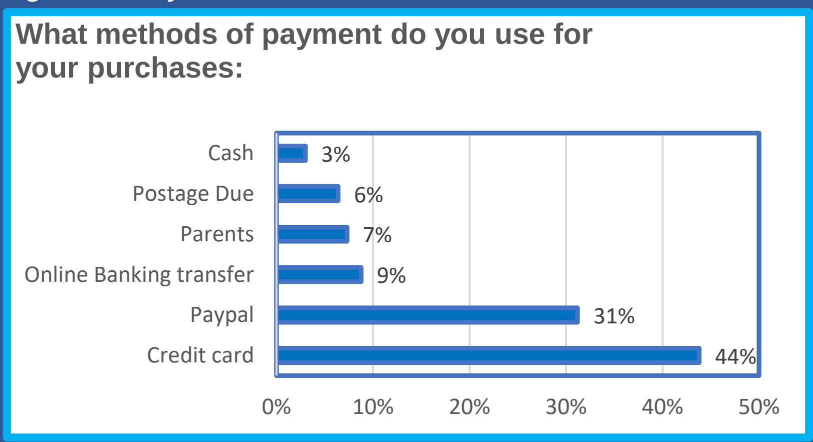
Figure 27. If you had an extra 200 €, how would you spend them?

Cultural activities	Training and studies	Books	Sports	Technology	Clothes	Hang out with Friends	Travel	I would save them
2%	**4%**	**5%**	**6%**	**12%**	**16%**	**17%**	**17%**	**22%**

In some previous charts, one of the handicaps towards the investment of young people in cultural activities was the cost of the products. However, this figure demonstrates that even if they had some extra money, they would rather save it or spend it on other products than cultural ones. According to the answers obtained by the participants, the priorities of Z consumers would be, in such case:

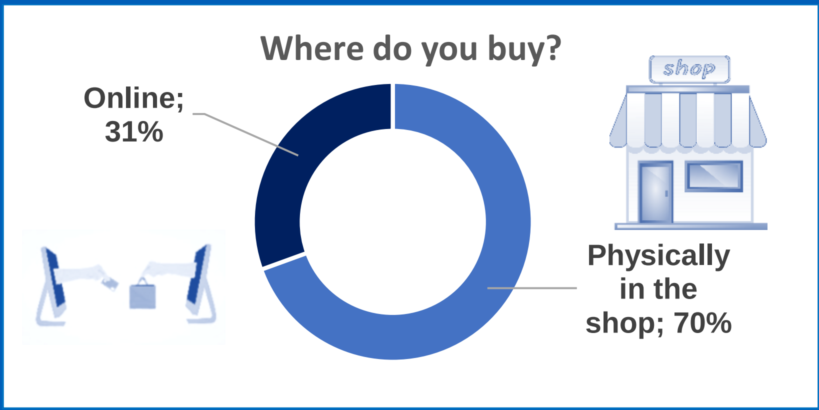
1. I would save them
2. I would spend them on travelling
3. I would invest them in hanging out with friends (experiences, dinners, dance…)
4. I would purchase clothes
5. I would consume technology
6. I would spend them in sports activities
7. I would buy book
8. I would invest in training courses and educational material
9. I would purchase cultural activities

Figure 28. Payment methods



44% of the Z consumers says they use credit cards to pay purchases, against **3% only** who would pay on cash

Figure 29. Online shopping vs. in a store

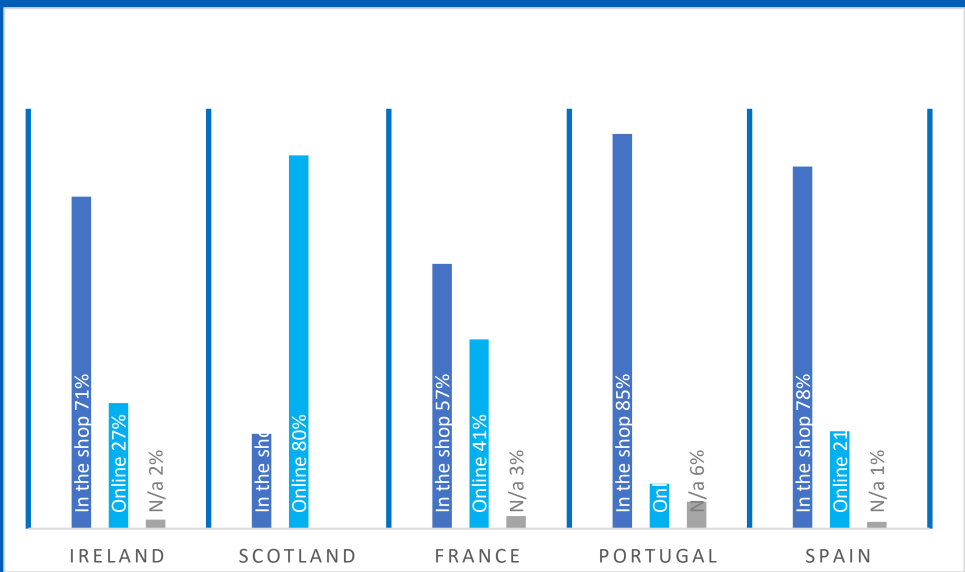


Despite the digital habits and taste of Generation Z, still, according to the survey, young consumers from the EA area still prefer to buy physically in the shop, rather than through online services.

This is in line with consumption habits from other areas: According to "Interactions Consumer Experience Marketing report " (2016), in the U.S., Generation Z also prefers to shop in-store (64%), rather than online.

We can observe however some differences between EA areas, especially with the case of Scotland, where a large majority of participants (80%) prefer to shop online:

Figure 30. Online shopping vs. in a store per countries



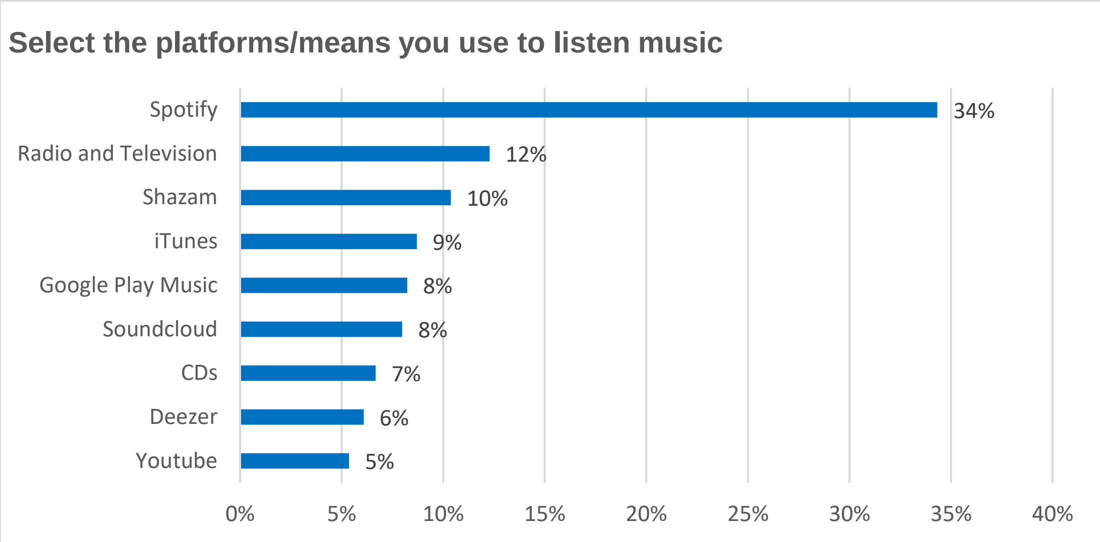
Finally, as far as spending patterns are concerned, it is interesting to see which platforms and Social Networks are the mote commonly used by Generation Z consumers.

Figure 31. Preferred Social media and photography applications by Z consumers

Social Media	Among social networks	Among photography Apps
	18%	-
	17%	42%
	15%	-
	11%	21%
	11%	-
	9%	-
	6%	-
	3%	2%
reddit	2%	-
	1%	8%
	0%	12%
	-	14%
	-	2%

Youtube and Instagram are the most commonly used App for communication through Social Media channels and photography applications (17% of Gen Z consumers use Instagram to communicate with others and 42% to share pictures). WhatsApp is also a widely used to keep in touch with friends, achieving 15% of the sample. In third place, Snapchat and Facebook are most used by teenagers with 11% respectively. In this vein, Snapchat is also among the most used App for photography, reaching the 21%.

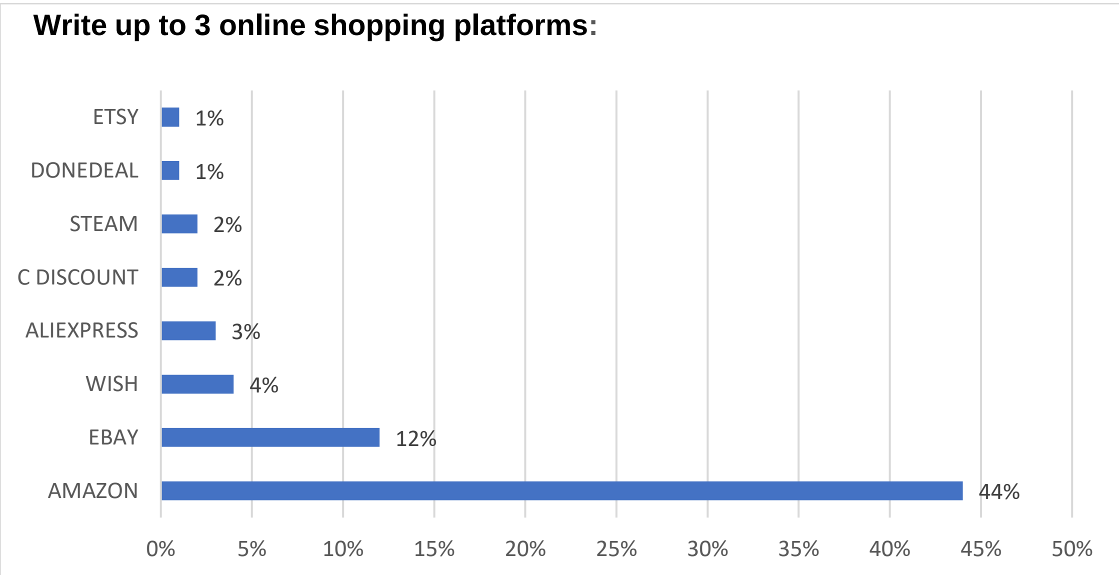
Figure 32. Platforms to listen music



As stated, the favourite leisure activity of teenagers is listening to music. In that framework, the most common platforms used are Spotify (34% of participants), followed by Radio and TV (12%) and Shazam (10%). The use of CDs by young people has been marked by 7% only of the participants, stressing the gap between analogue supports versus digital platforms.

As far as online shopping platforms are used to purchase products and services, the most popular one is clearly Amazon (44% of the answers), followed by eBay (12%). Some participants also use other platforms such as Wish or or Aliexpress, but in as a much lower habit (4% and 3%, respectively). There is no question that **Amazon is the star in online shopping.**

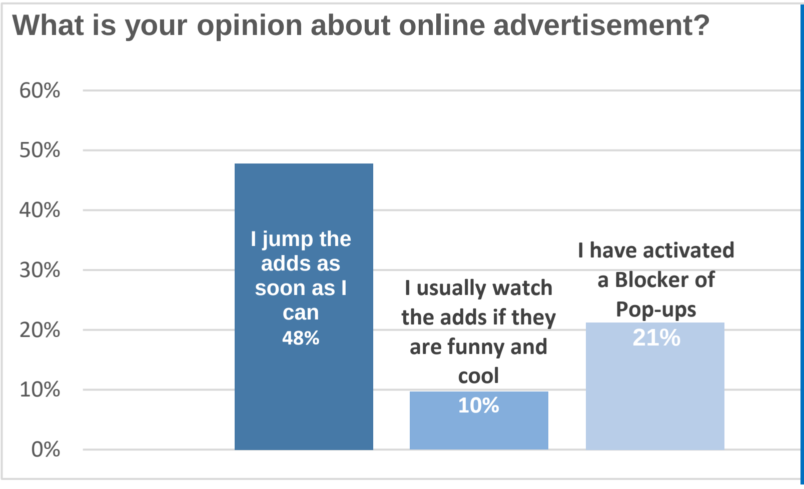
Figure 33. Percentages of most used platforms for shopping products and services



III. DIGITAL BEHAVIOUR, TASTE AND LIFESTYLE

Generation Z is the first digitally-born generation. Its members are thus very comfortable with technological issues. Then, how can companies attract them? What do they think about online adds and current trends on TV?

Figure 34. Advertisement



What Z consumers think about watching advertisement before enjoying their favourite channel, programme or game?

48% of Z consumers jump the adds as soon as they can and **21%** have activate a blocker of Pop ups.

Only 10% declare watching them, but only if they are funny and cool…

Figure 35. What are your favourite movies and series? Mention up to 3

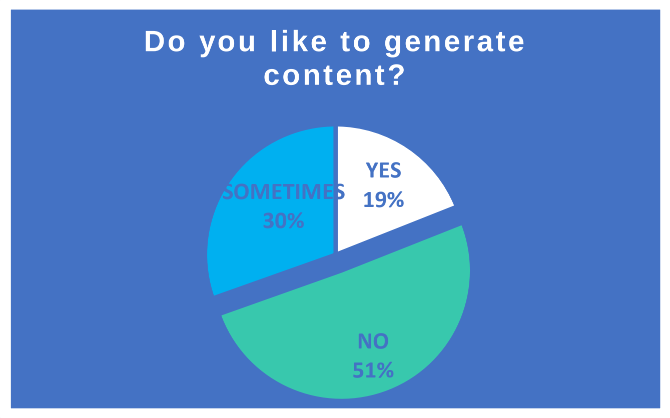
IRELAND	SCOTLAND	FRANCE	PORTUGAL	SPAIN
STAR WARS (8%)	THE AFFAIR (13%)	LA CASA DE PAPEL (5%)	STRANGER THINGS (5%)	GAME OF THRONES (6%)
AVENGERS (4%)	LOVE ISLAND (10%)	GAME OF THRONES (5%)	RIVERDALE (5%)	LA CASA DE PAPEL (5%)
PENNY DREADFUL (4%)	SKINS (10%)	13 REASONS WHY (4%)	GAME OF THRONES (4%)	WALKING DEATH (4%)
RIVERDALE (4%)	BREAKING BAD (10%)		LA CASA DE PAPEL (3%)	HARRY POTTER (3%)

As far as the taste of Generation Z in terms of audiovisual contents (films or series), obviously, there are some differences between countries, though 2 productions are among the favourite ones in 3 EA countries: the (huge) Hollywood production “Game of Thrones”, and the Spanish series “La Casa de Papel”. However, the success of “La Casa de Papel” is quite unusual, since most of the answers would mention Hollywood-made products.

DIGITAL CONTENT AND COMMUNICATIONS

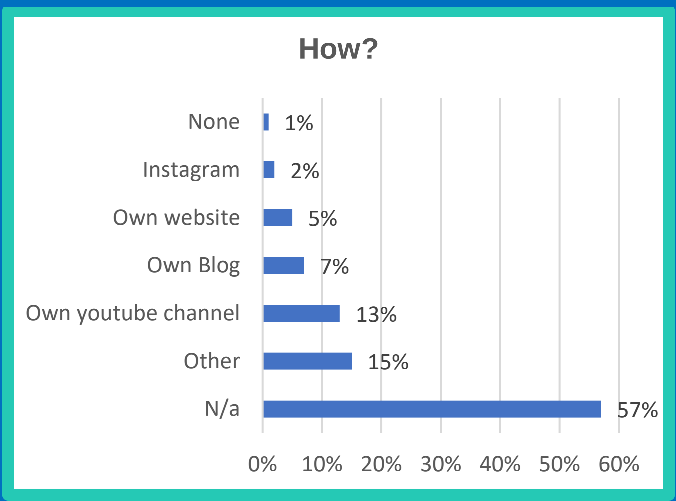
What does Generation Z think about generating online contents, and which channels do they use for such purpose. The results of the survey show us the following:

Figure 36. Generation of content



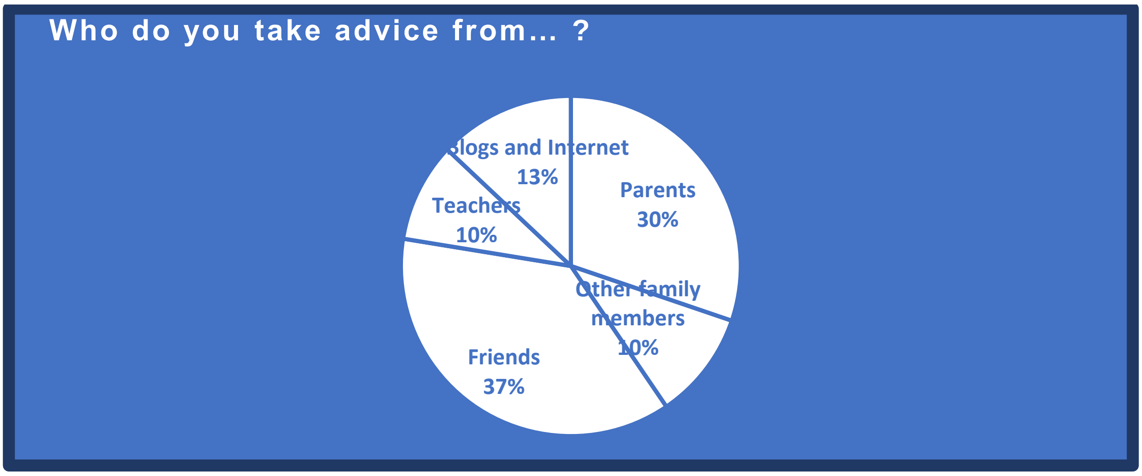
Almost half of the Generation Z members (49%) likes to generate online contents, though a majority only does it from time to time.

Figure 37. Channels used to generate content



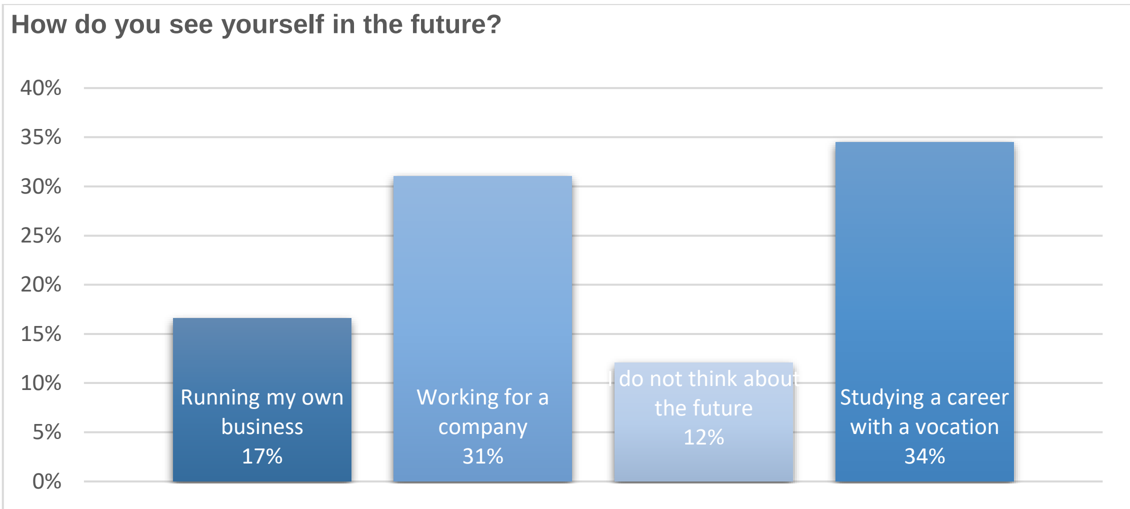
13% of them have their own Youtube channel, and **7%** generate contents through their own blog.

Figure 38. Generation Z advices



Teenagers are logically full of doubts, and still need wise advices. They would accept it mostly from friends (37%) and the family (parents: 30%; other family members: 10%). Despite their digital habits, according to the answers obtained through the survey, advices from Blogs or Internet are less taken into account (13% "only").

Figure 39. Vision an attitude towards the future



A majority of teenagers do think about their future and career. To better know their perspective, the survey asked them how do they see themselves, and, as stated in the previous graph, their answers are quite diverse:

- 34% of the teenagers want to study a degree with vocation
- 31% want to work for a company
- 17% want to have their own business
- 12% do not think about the future

F. THE COMPANIES´ PERSPECTIVE

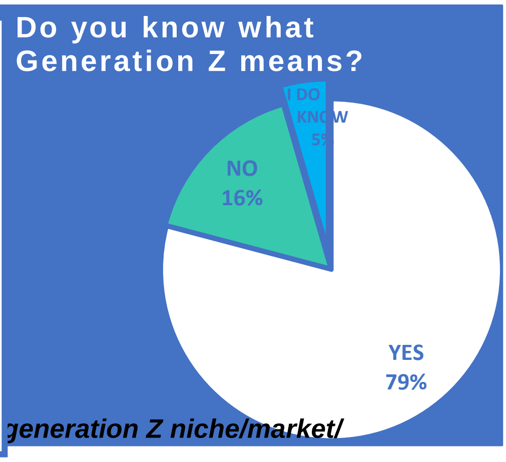
Companies are a fundamental pillar to create knowledge along with citizens and government. One of the main goals in this chapter is to analyse the companies' position, their necessities and their priorities towards the collaboration and creation of innovation together with the other main actors involved in the 4H-CREAT project: Generation Z and public organisations.

I. KNOWLEDGE AND INTEREST

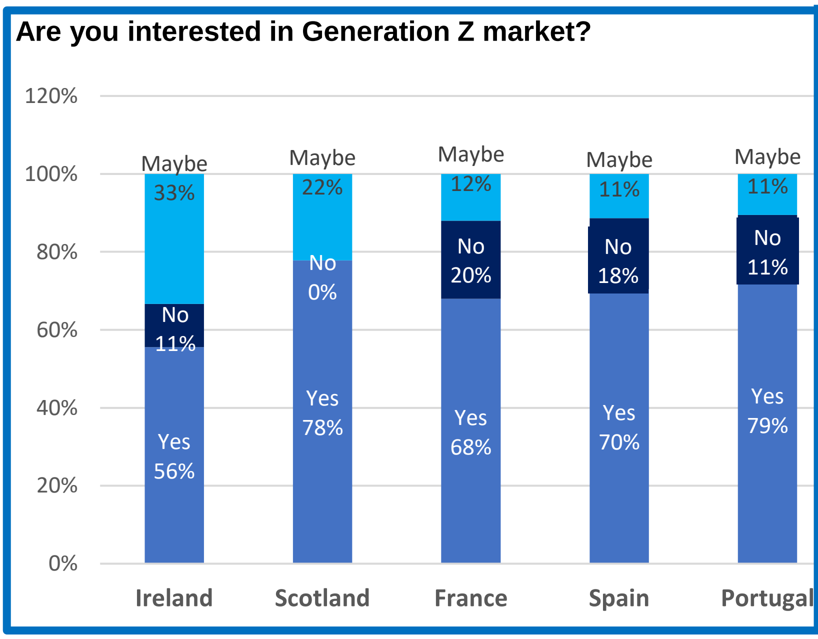
Are Cultural and Creative Industries interested in Generation Z market niche? What do they know about them? Are they able to adapt themselves to current market trends?

Figure 40. Percentage of companies that know what Generation Z means

As far as Generation Z concept is concerned it surprisingly seems that a large majority of companies (CCIs) owners or directors are aware of the concept (almost 80%), while the rest either clearly do not know (16%) or are not sure (5%) about the meaning of Generation Z.



generation Z niche/market/ audience by countries

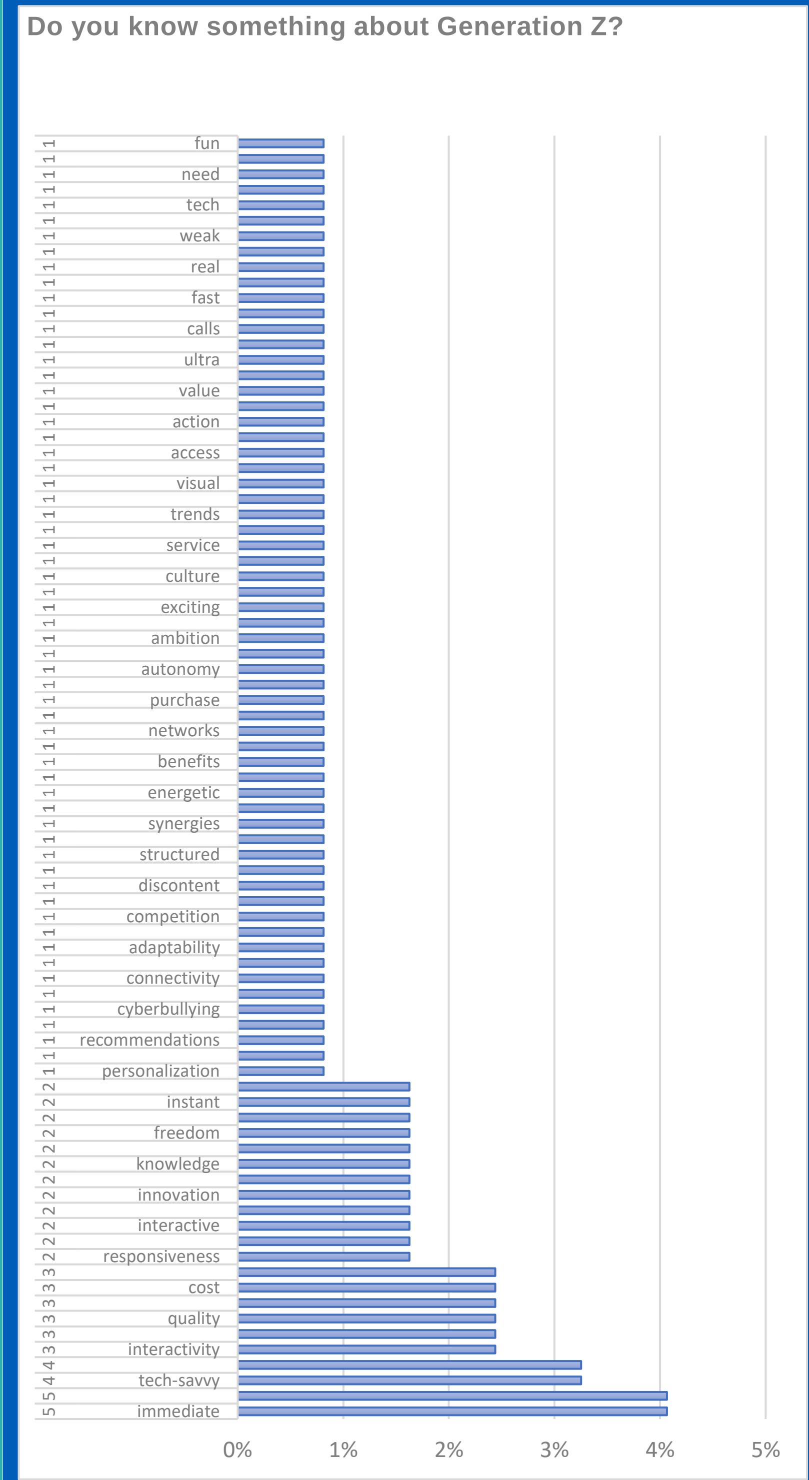


Among the companies that do know what Generation Z means, the majority in each country are clearly interested in such market niche.

We would observe a stronger interest being manifested in Portugal (79%) and Scotland (78%), while the interest in France and Spain are close to 70%.

Irish companies are slightly more doubtful, but still showing interest in Generation Z.

Figure 42. In general, what do you know about the demands of Generation Z?



This open question reflects what CCIs think or know, in general, about the profiles and demands of Generation Z consumers. The number of words has been counted by repetitions to understand the companies perspectives.

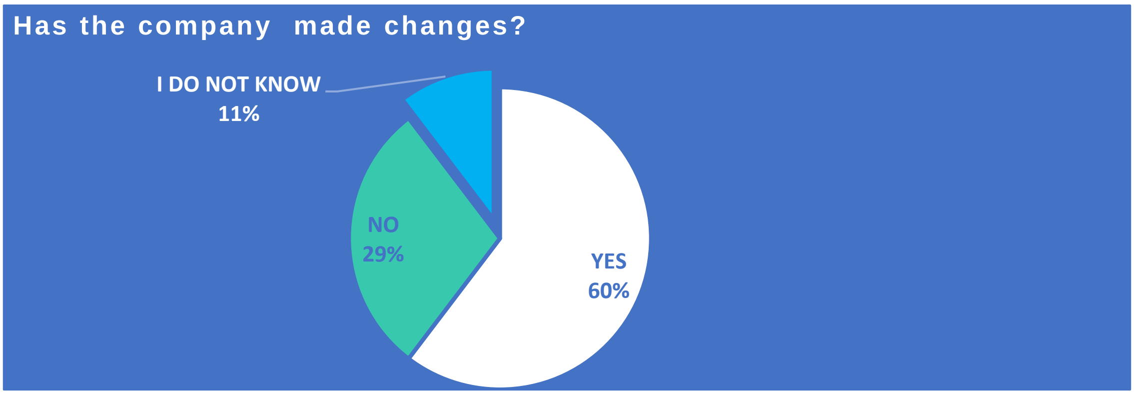
Most of the answers are in line with the digital profile of Generation Z, since companies would highlight the following characteristics: **Immediateness, Technology, Interactivity, Networks or Innovation.**

The CCIs also refer to less ICT characteristics, and mention psycho-social profiles issues such as **Freedom, Responsiveness, Personalisation on the web, connectivity or access to information**.

Some are also aware of the importance of traditional ...ce... ...ch **Quality and Price,** though ...en... ...is clear consensus, though most of the ideas are somehow correct and reflec... ...ne ...rrec... ...file of Generation Z consu...

Figure 43. Has the company made changes to adapt its business activity to the current digital trends, in particular towards the Generation Z?

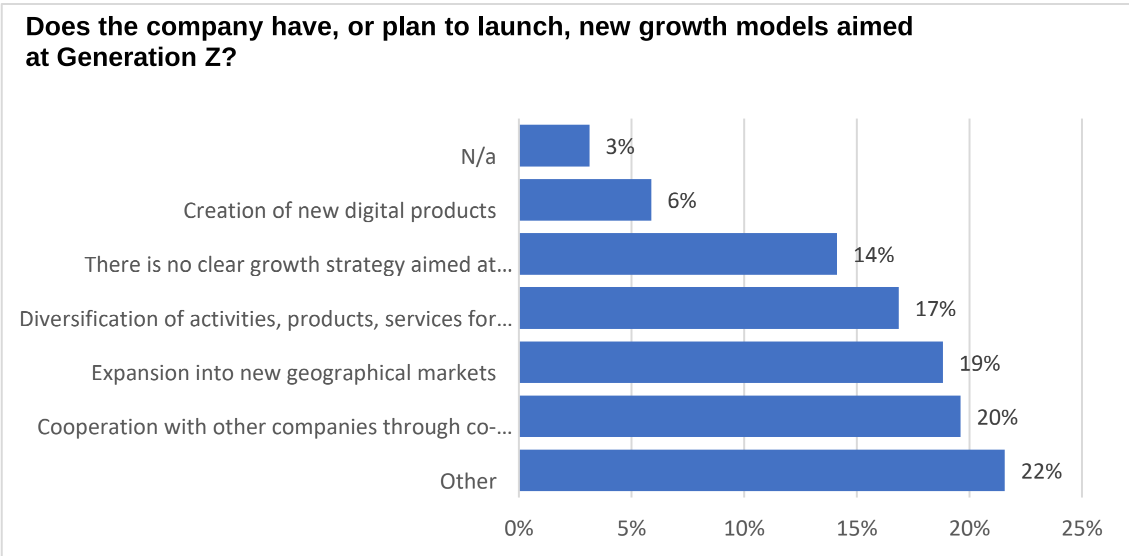
Linked to the innovation framework, most companies interested in Generation Z have made some changes to innovate.



60% of such companies have innovated towards Generation Z demands.

This percentage seems surprisingly high. The following graph brings some information about the kind of improvements or changes that CCIs have made or are planning.

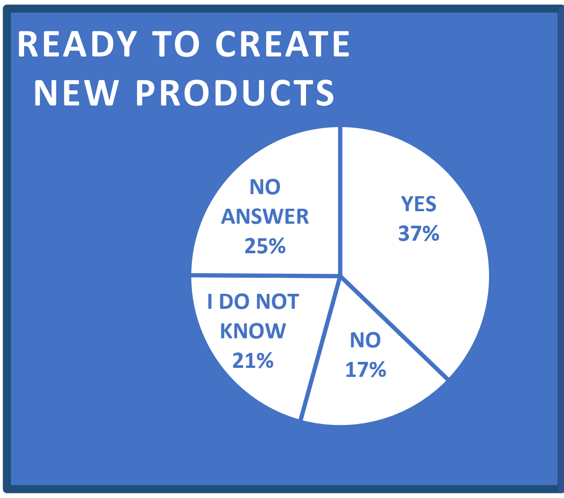
Figure 44. Does the company have or plan to launch new growth models aimed at Generation Z



In this aspect, it is to be highlighted that the creation of new digital products doesn't seem to be a priority, while the cooperation with other companies and the diversification through new products and geographical markets do:

- **20%** of the companies wants cooperation with other companies through co-productions, franchises, and joint-ventures.
- **19%** of the companies plan to expand into new geographical markets
- **17%** Think in the diversification of activities, products, services for the younger public/target audience.
- **14%** of the companies do not have clear a strategy aimed at generation Z.
- **6%** of the companies have the intention to create new digital products.

Figure 45. Level of preparation of the companies towards the creation of products for Generation Z



Are the participating companies ready to create new products focused on Z consumers needs?

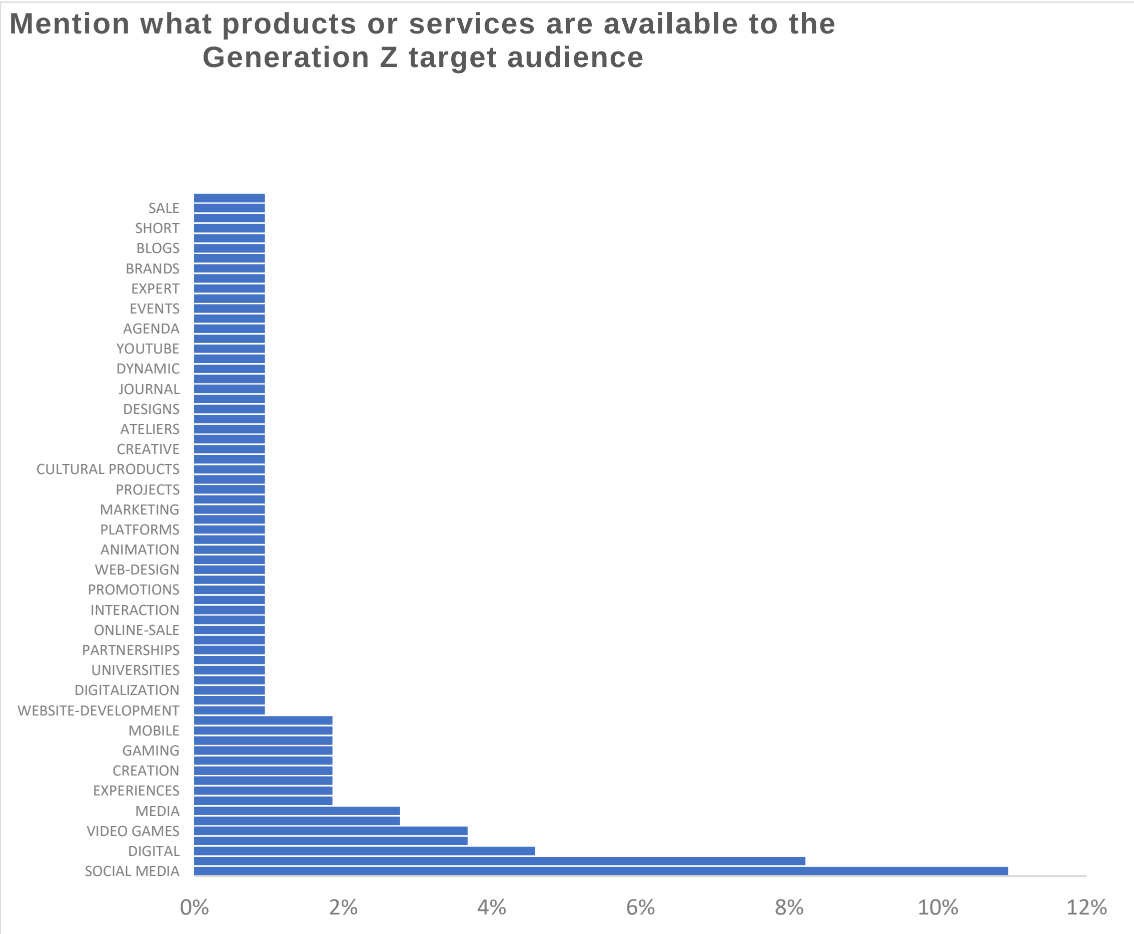
While 37% declares being ready, it seems that a large majority doesn't find themselves ready or are not really sure that they have the capacity to create new products or services orientated to Generation Z target groups.

II. EXISTING RESOURCES AND CAPACITIES

a. Resources

Despite the declared knowledge and efforts of CCIs from the Atlantic Area towards Generation Z target groups, it seems that there is no clear common specialisation in terms of specific products or services. The only common ground is, again, the relation with the digital world, since many of the services available to that market niche turn around Social Media, Internet, Mobile devices or Gaming, among some of the most relevant ones:

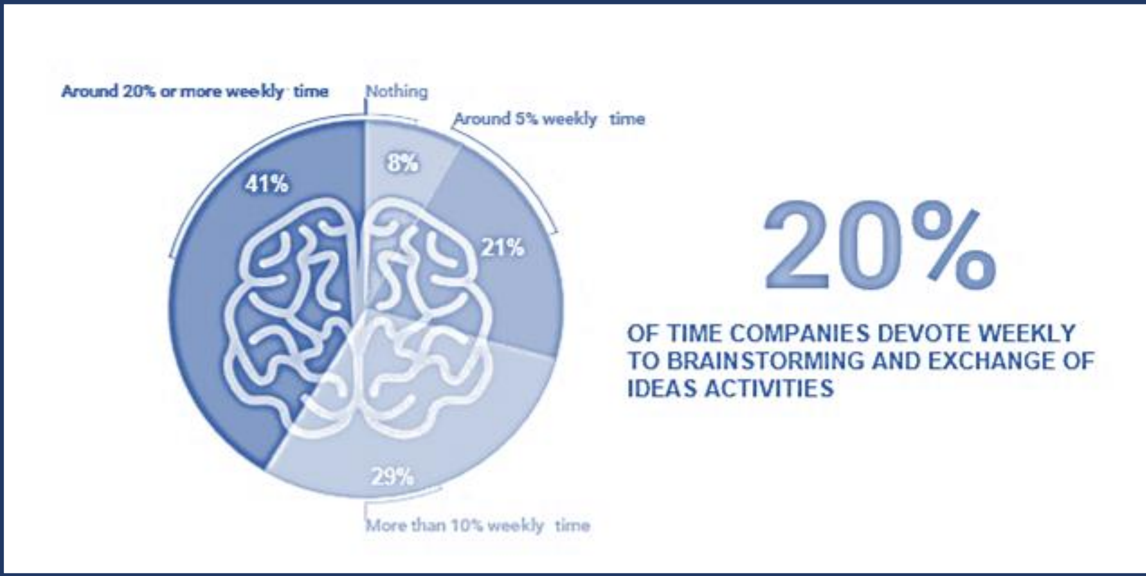
Figure 46. Products or services available to Generation Z



In general, CCIs do not have a specific marketing department, nor mention specific products created ad hoc for the younger generations (apart from the ones coming from the gaming industry).

The following graphs brings some ideas about their internal structures, departments and management of innovation processes.

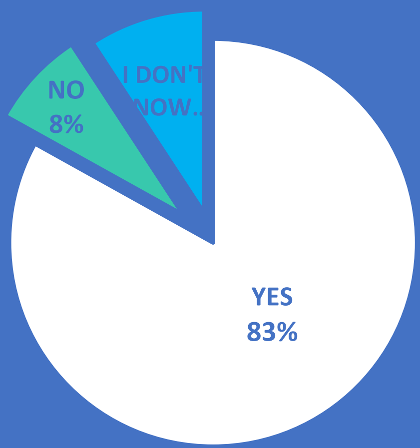
Figure 47. Percentage of weekly time devoted to brainstorming or exchange of ideas activities



Regarding the companies' weekly time devoted to brainstorming and/or the exchange of ideas, we can highlight that 41% of companies spend around 20% of their time (the equivalent to 1 full day/week); 29% of the CCIs would spend more than 10%; and 21% of the companies around 5% of their time. Only 8% do not brainstorm or usually spend time on exchange of ideas processes.

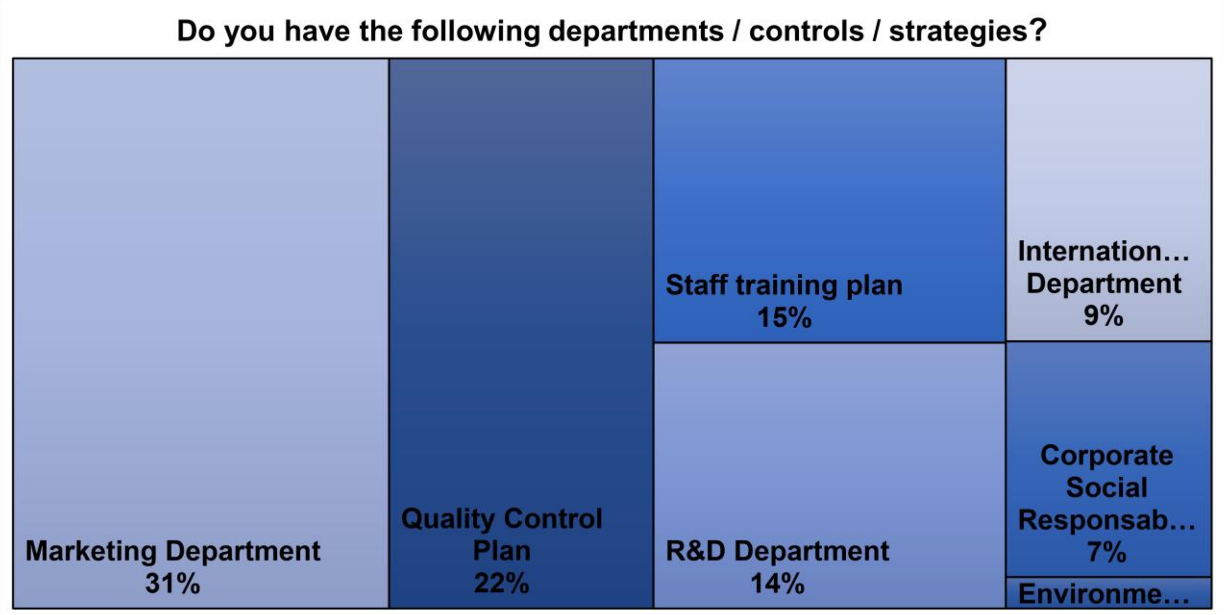
Figure 48. Percentage of companies that try to involve all its staff in its short and long-term innovation strategies

As far as innovation strategies are concerned, **a large majority (83%) tries to involve their staff in short and long term strategies**, a quite important factor towards the creation of success stories.



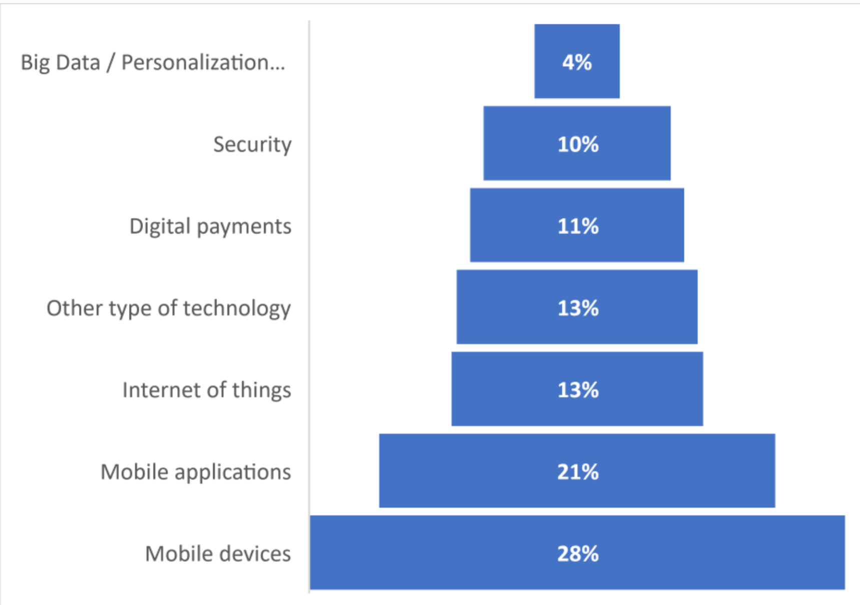
As stated, most of the companies are small/micro ones, even often self-employed people. In that sense, it is important to be careful when analysing their answers, and bear their size in mind towards their potential and capacities. Still, some of them manage to have some professional structure, departments and controls, such as "Quality", "Internationalsation" or "Marketing". In fact, "Marketing" is the most common department and investment, with almost one third of the answers (31%):

Figure 49. Departments/Control strategies



But for that reasons, only 14% of the companies that have participated in the survey do have a Research and Development department, and 9% would have a proper department for internationalisation. These kinds of low figures might be a problem towards the fulfilment of 4H-CREAT project objectives to pursue transnational technological cooperation among companies and institutions.

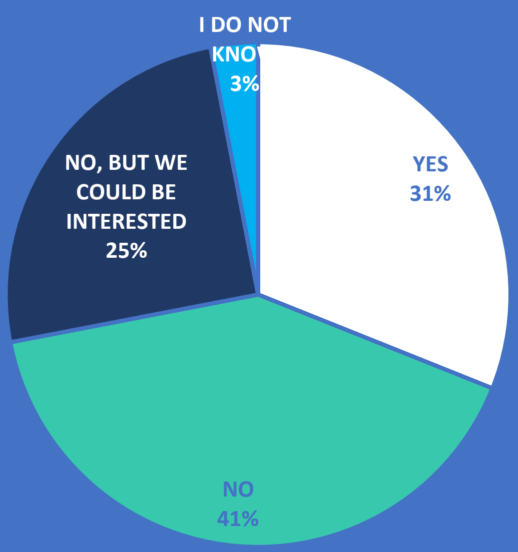
Figure 50. Type of technology used to conduct business



As far as technological investment is concerned, the most common one is linked to Mobile devices and Apps.

Only 11% of participating CCIs have implemented digital payment solutions, and the use of Smart Data (Big or Open) remains anecdotal.

Figure 51. Does the company have collaborative platforms with the users to manage recommendations and suggestions through social networks?



While Social Media is really important for companies innovation, the use of collaborative online platforms can be of interest to interact with Generation Z customers.

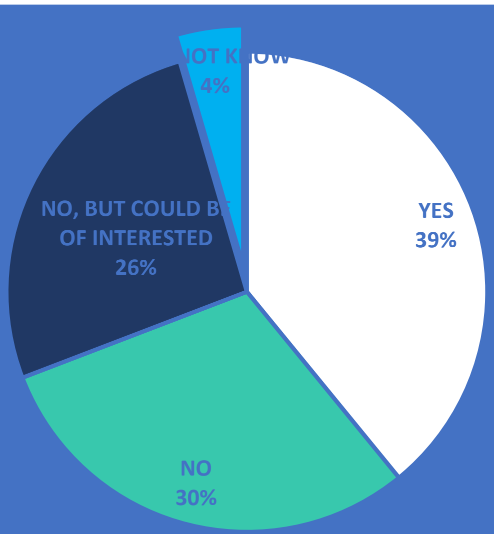
While almost one third again of the participating CCIs (31%) do have (or use) such kind of digital tool, 25% could be interested in such kind of solutions.

This could be a field of interest in particular towards the cooperation between public and private entities, and could bring new opportunities for 4H-CREAT partnership.

b. Cooperation Capacities and Habits

In line with 4H-CREAT project objectives, it is interesting to know about the capacities and habits of the Atlantic CCIs in terms of cooperation, co-creation and co-production processes, especially to find out opportunities or weaknesses to better support them.

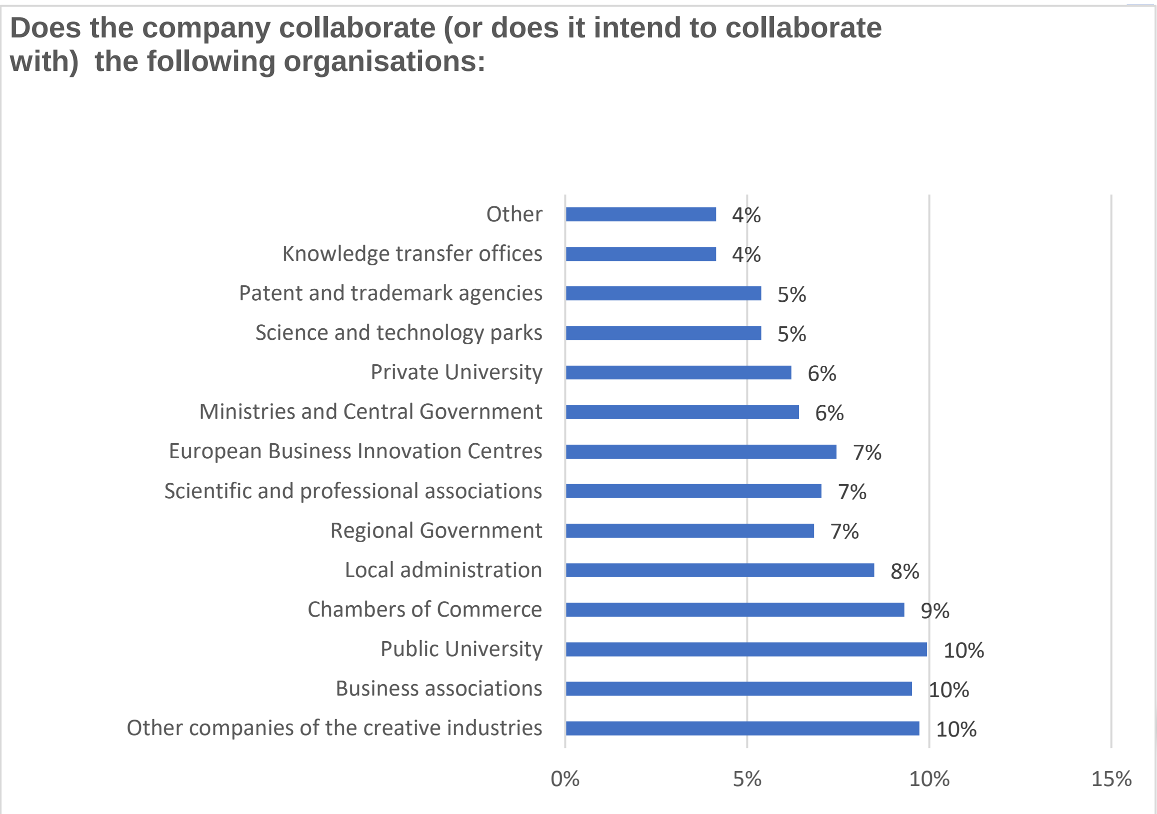
Figure 52. Does the company use co-creation techniques and actions through the participation and feedback of users before the launch of products or services?



39% of companies ask for online feedback from their users/consumers, against 30% of companies that do not do any action.

26% would be interested in using/learning more about co-creation techniques and actions.

Figure 53. Does the company collaborate (or does it intend to collaborate with) the following organisations?



There is no general trends or habit in terms of cooperating with one or another organisation. Only 10% of CCIs would develop projects or participate in activities with public universities, business associations or other companies from the subsector of the cultural and creative industries.

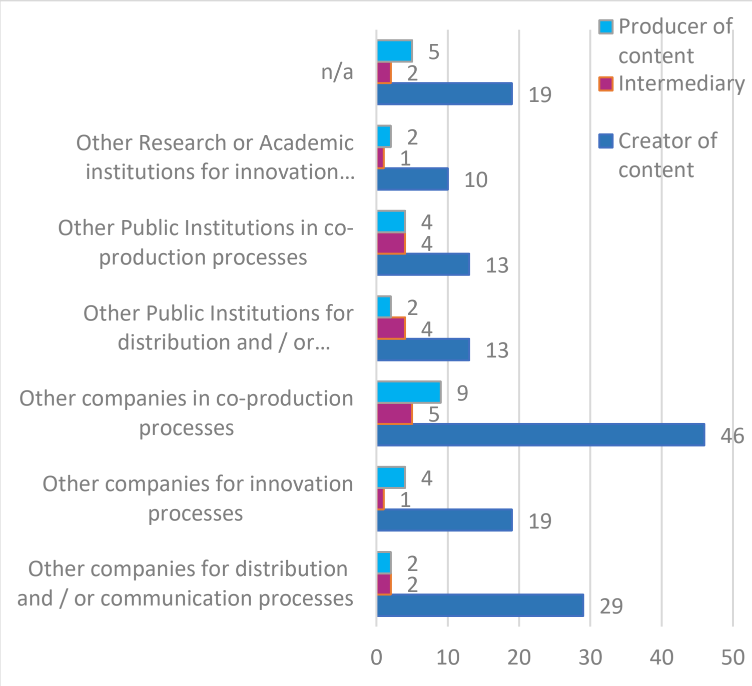
To a lesser extent (between 9-7%) the companies are collaborating or want to cooperate with Chambers of Commerce, Local administration, Regional Government, Scientific and professional associations or European Business Centres.

But towards innovation processes, only a few companies (5% or less of the answers) would work with the so called “knowledge transfer offices” of universities, Patent and Trademark agencies or Science and Technology Parks.

Cooperation with other stakeholders and counterparts shouldn’t be considered as a habit for the Atlantic CCIs, and efforts have to be made to change this lack of collaboration.

Only 10% of Atlantic CCIs collaborate or are willing to cooperate with other companies of the creative industries sector, Business Associations, and Public Universities.

Figure 54. Does the company usually collaborate with (crossing with the type of company variable)

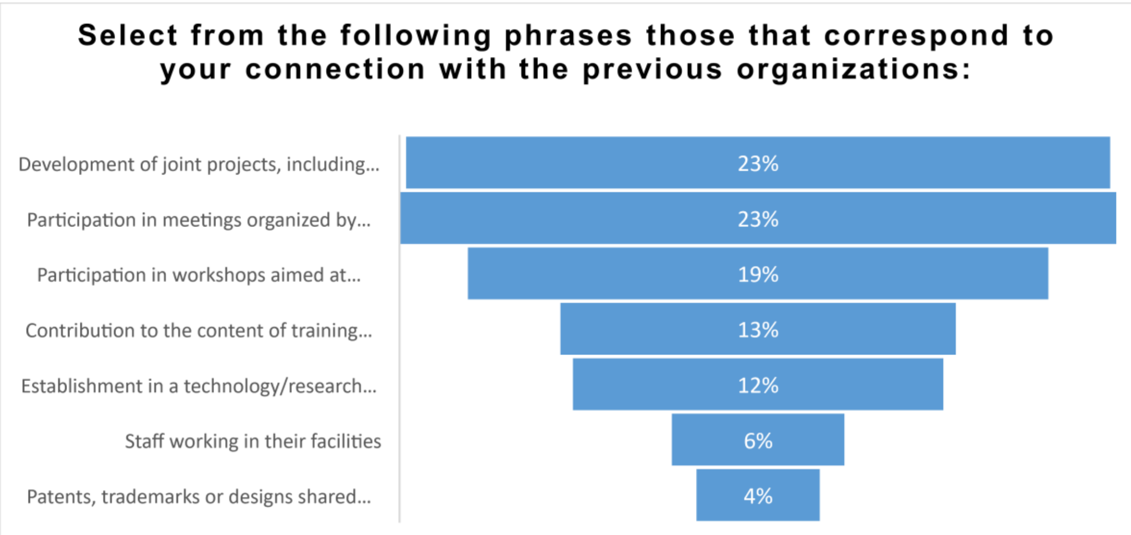


According to the profile of the participating companies in the survey, most of them are “creators”. In this aspect, 46 creators collaborate with other companies in co-production processes and 29 for distribution processes.

However, producers - specifically 9 companies – also cooperate with other companies in co-production projects.

As far as intermediary companies are concerned, they are less represented in the survey, but would be, in proportion, more eager for public-private collaborations.

Figure 55. Connection with the other organisations:



As far as the kind of collaborations with third organisations are concerned, they can be very wide and with different levels of intensity, from staff exchanges (in a minor level, 6% of the answers) to simply the participation in meetings (23%) or workshops (19%).

It is important to highlight that almost ¼ (23%) also mention the joint development of projects.

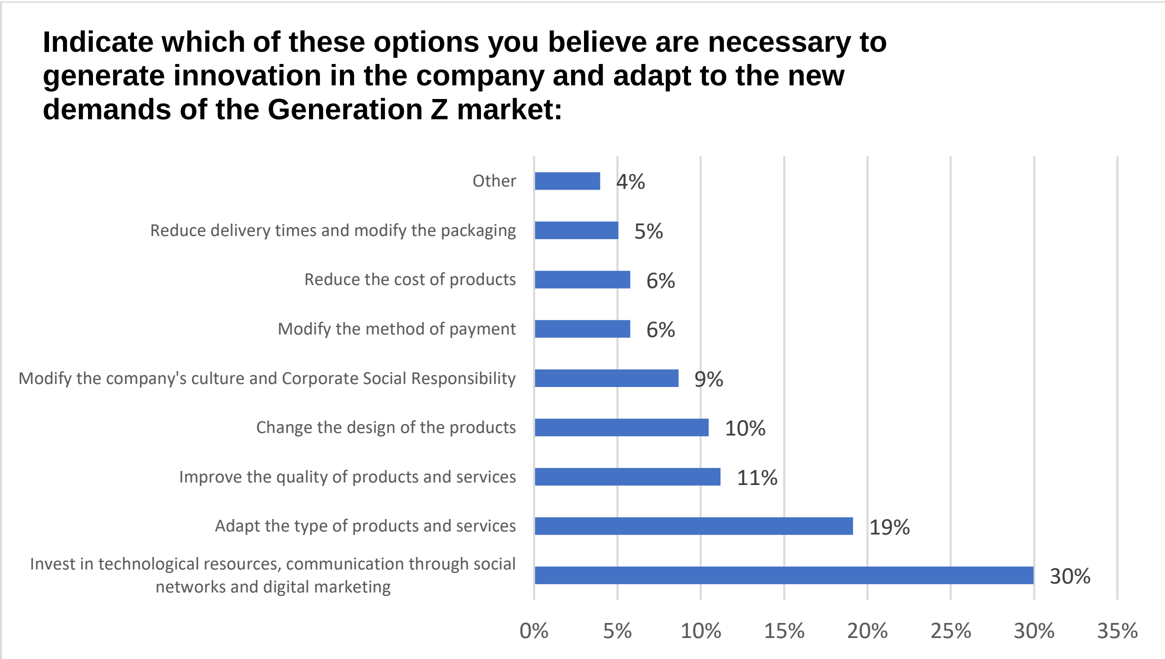
At a minor level, but among other interesting ways of public-private cooperation, some ICCs have brought their knowledge and contributed to contents of training activities (13%), and/or are are established in incubators or business accelerators promoted by third organisations (12%).

III. SPECIFIC NEEDS

In addition to knowledge of the market and internal resources – both, economic and human ones - to generate an innovation ecosystem within a triple or quadruple helix model requires the identification and understanding of the specific needs of the companies to adapt themselves. While the previous sections contribute to give a picture of the available capacities and habits of the Atlantic CCIs, the present one should help to classify such needs, in particular to identify potential gaps and potential contents to further develop public-private cooperation activities.

In that sense, a first question is to find out what is required to companies to adapt themselves to Generation Z demands.

Figure 56. Options to generate innovation in the company

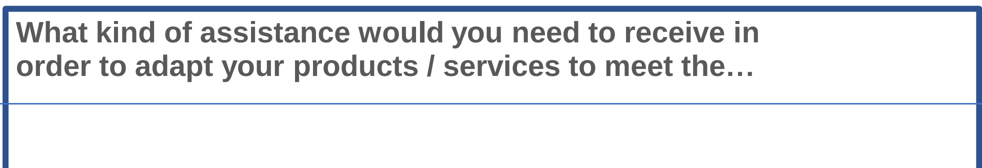


While the reduction of costs of the products or reduction of delivery times are not among the key fields of innovation identified by the companies, it seems that the efforts should be concentrated on 2 main fields:

- From one side, 40% of the answers turn around the adaptation and/or improvement of the products or services (namely, 19% of adaptation, 11% of quality improvement and 10% of new design)
- On the other side, around one third of the answers (30%) believe that investing in technology and ICT is necessary to adapt their companies to Generation Z market niche.

However, according to the answers provided by the younger consumers (see "Spending patterns" chapter), the price remains of the main decision criteria … CCIs should also innovate and invest thus towards the reduction of costs of their products or services.

Figure 57. Kind of assistance required



What are the currents services needed or required by Atlantic CCIs to adapt themselves and their products to Generation Z demands?

Such kind of answers can also orientate public and private support organisations towards the delivery of new services for CCIs.

In general, we can observe in the first chart that the main preferences of the CCIs are:

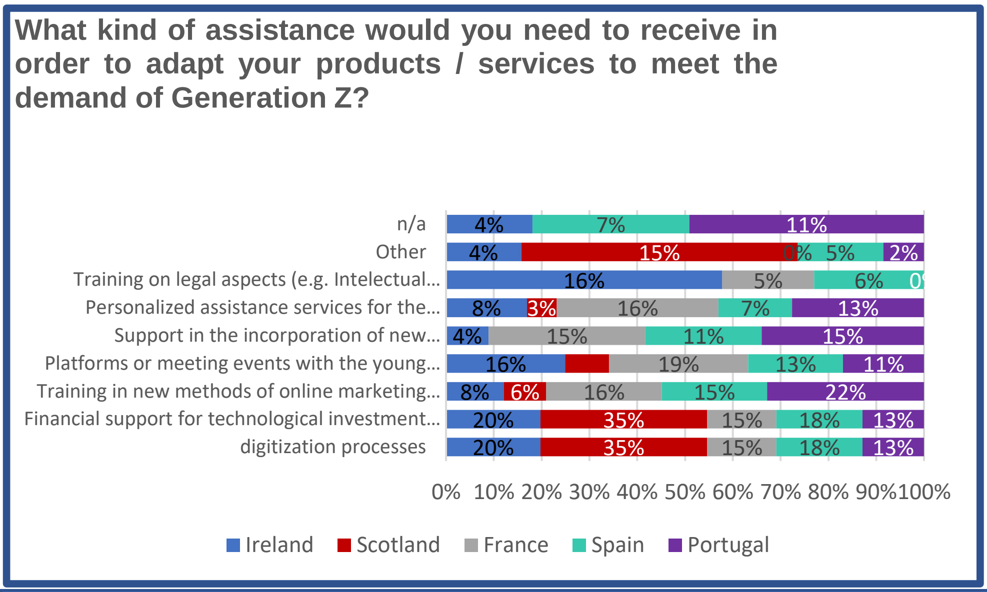
-24% would need financial support to be able to undertake the necessary technological investment

-19% demand training linked to online marketing

-17% would appreciate to have B2C meetings or platforms to meet new generations.

Figure: Kind of assistance required per countries

Figure 58. Kind of assistance needed by country



Concerning the same questions but analysed per sample country, we can note:

19% of companies ask for Platforms or meetings events with Z costumers (B2C solutions)

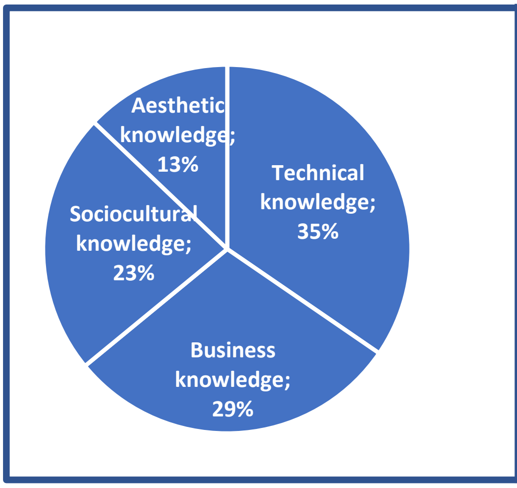
35% of companies require support for digitalisation process and financial support for tech investment

20% of companies require support for digitalisation process and financial support for tech investment

22% of companies demand training linked to online marketing

18% of CCIs require support for digitalisation process and financial support for tech investment

Figure 59. What kind of support would you most like to receive from intermediate organisations to increase the potential of innovation of your company?

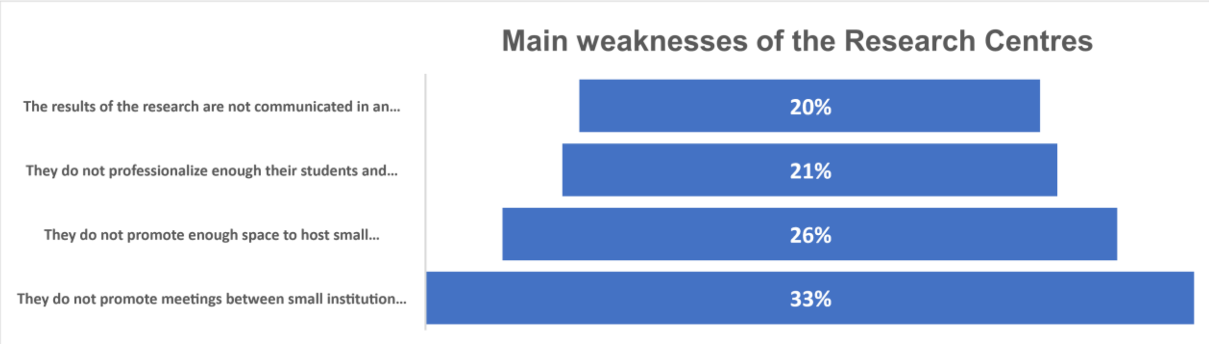


In the same line, to identify what kind of support companies would like to receive from third/intermediate organisations in order to increase their potential of innovation, in general, the most common answers would turn around the acquisition of technical (35%) or business (29%) knowledge:

- 35% of CCIs would like technical knowledge
- 29% would like to be assessed on Business knowledge
- 23% would like to know sociocultural aspects
- Few companies, only 13% would like to receive information about "aesthetic" issues

As it has been previously showed, there is a clear lack of cooperation between Atlantic CCIs and Research/Technological Centres or Universities, and thus a need to increase the transfer of knowledge and communication and collaboration channels between them. According to the survey, from the companies' perspective, this lack of cooperation is mostly due to the lack of encounters. Most CCIs are small-size companies and do not feel involved in the development or exploitation of research results.

Figure 60. What do you think is the main weakness of the Research Centres and the Universities in terms of knowledge transfer?



Universities and Research Centres could also increase their equipment and space available to host SMEs and start-ups and, in general, improve the communication and dissemination of their activities and results, especially towards cultural and creative industries.

33% of the companies think Research Centres and Universities do not promote enough meetings with CCIs to facilitate knowledge flow


ORGANISATIONS
Seo
consulting
Strategy
Content
Management
Web Analytics
CONTENT
Reputation Management
KEYWORD
RESEARCH
Online Presence
Web Design
Link
Building
Responsive
Design
Social Media Marketing
E-mail
Marketing
Mobile Seo
INSTITUTIONS
Content
Development
Search
Engine
Seo
Mobile Marketing
Services
Viral Marketing
PERSONAS
Marketing
Website
Optimization
E-commerce
Local
SEO
Content
Internet
Market Research
Marketing

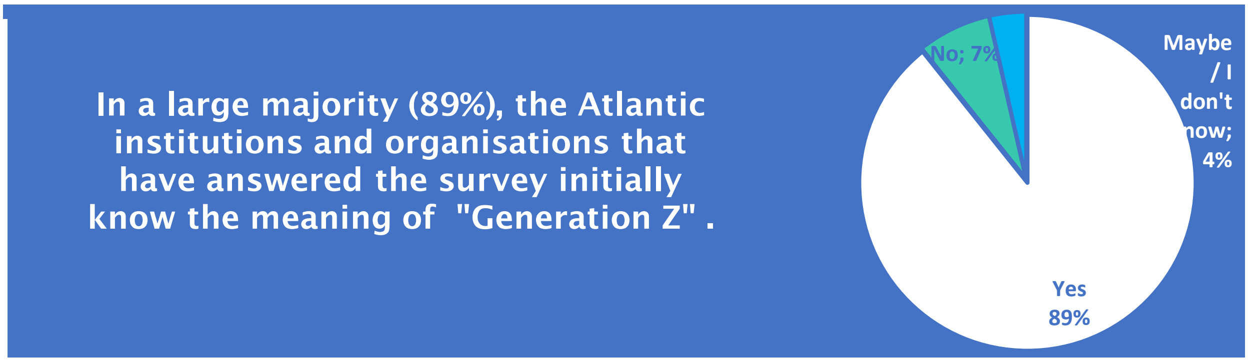
G. OTHER PUBLIC AND PRIVATE STAKEHOLDERS PERCEPTION

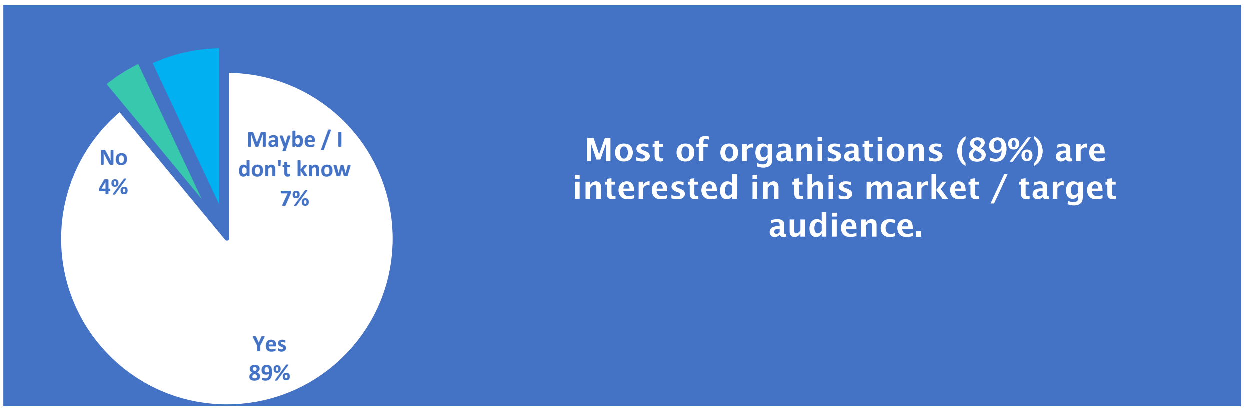
While companies and the society (in this case, Generation Z consumers) form the first two “legs” or “helixes” of a quadruple helix approach towards Driven and Open Innovation, they are complemented by public and private stakeholders, namely, policy-makers, support institutions and research and academic centres. Though in the framework of the present report a very small sample of such kind of institutions and organisations have collaborated, as for companies, it is interesting to learn from their fields ofinterest, resources and position towards the companies’needs.

I. KNOWLEDGE & INTERESTS

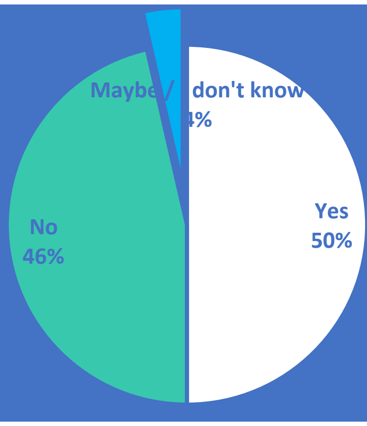
Can we figure out what institutions know about young generation tastes, demands and topics? In this section, we examine the answers.

Figures 61, 62 and 63. Do you know what Generation Z means?; Are you interested in this niche/market/audience? ; Has your institution developed new products for Generation Z?





Results are not homogeneous when we ask about developing new products for Generation Z. **Half of organisations have developped new products or services for teenagers in contrast with 46% of organisations that haven't made any efforts yet.**



As for the companies, and taking into account the fact that the large majority declares knowing Generation Z profile, and that most of the participating institutions and organisations would be interested in this market niche, it is interesting to see about their perception and check they resume it through simple sentences or just a few words. According to public and private stakeholders, Generation Z is formed by:

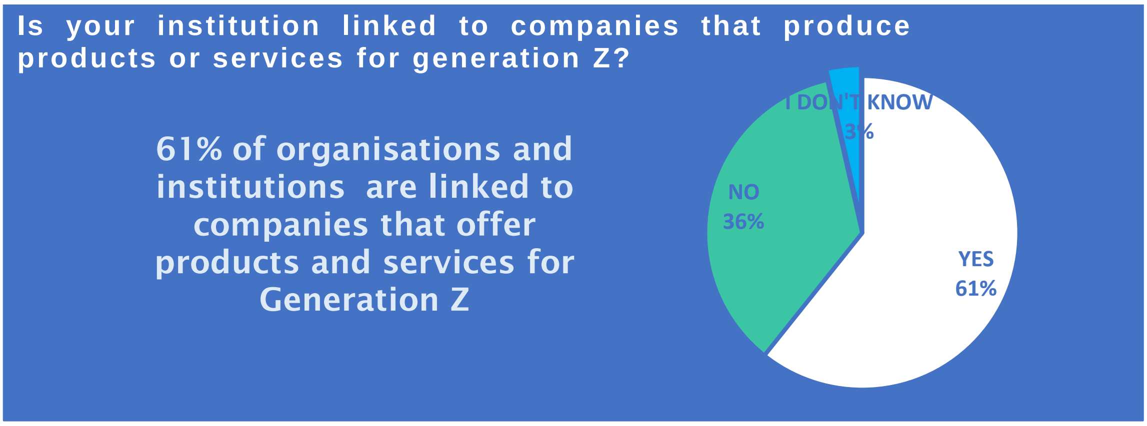
- Young generations born after millennials
- They are born in the digital era
- Always connected and online
- They are content producers and coproducers of their demands
- They prefer to live the "experience" in a short time
- Inpatients
- They have short attention
- Tech-savvy
- Independent, entrepreneurial and global citizen
- They want digital products and personalisation
- They expect an immediate response
- They need transparency
- They wish speed in responses

Generally speaking, these perceptions are correct and in line with the profiles described under chapters "D" (GENERATION Z) and "E" (GENERATION Z SURVEY RESULTS) of the present report.

II. EXISTING RESOURCES & CAPACITIES

In line with the exiting knowledge about this market niche, a majority of supporting organisations (universities, science and technology parks, business associations, regional governments, local administrations, chambers of commerce, etc.) are somehow linked to companies that do have products or services adapted to Generation Z, and collaborate with them in their production.

Figure 64. Percentage of Institutions linked to companies working for Generation Z

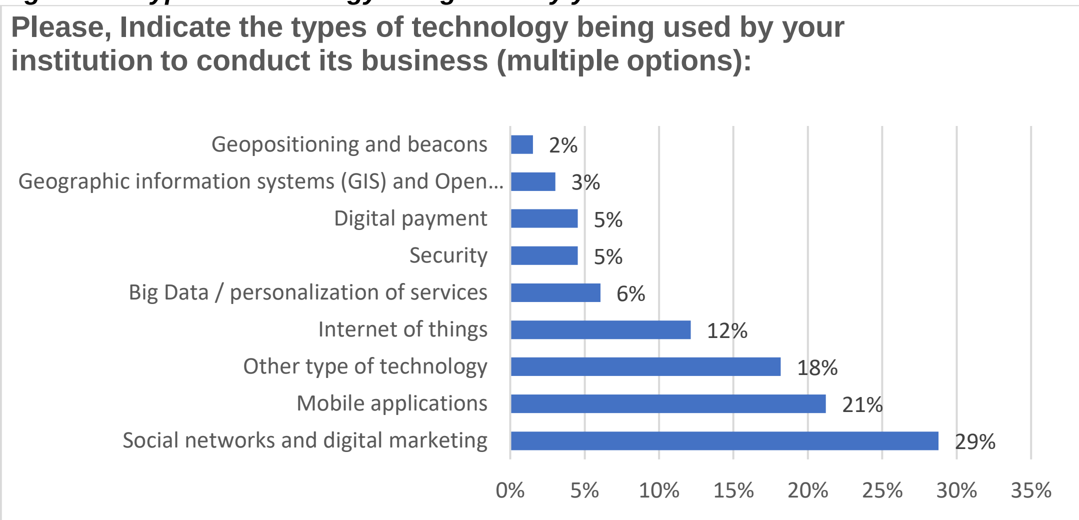


As far companies, the technology linked to mobile devices and Internet is considered as an essential issue and, in fact, among the main investments carried out by supporting organisations to answer the demand of their "clients" or " beneficiaries".

According to next graph, almost one third of organisations and institutions (29% respondents) have invested in Social Media and digital marketing, mostly to promote their activities, and 21% on Mobile Apps.

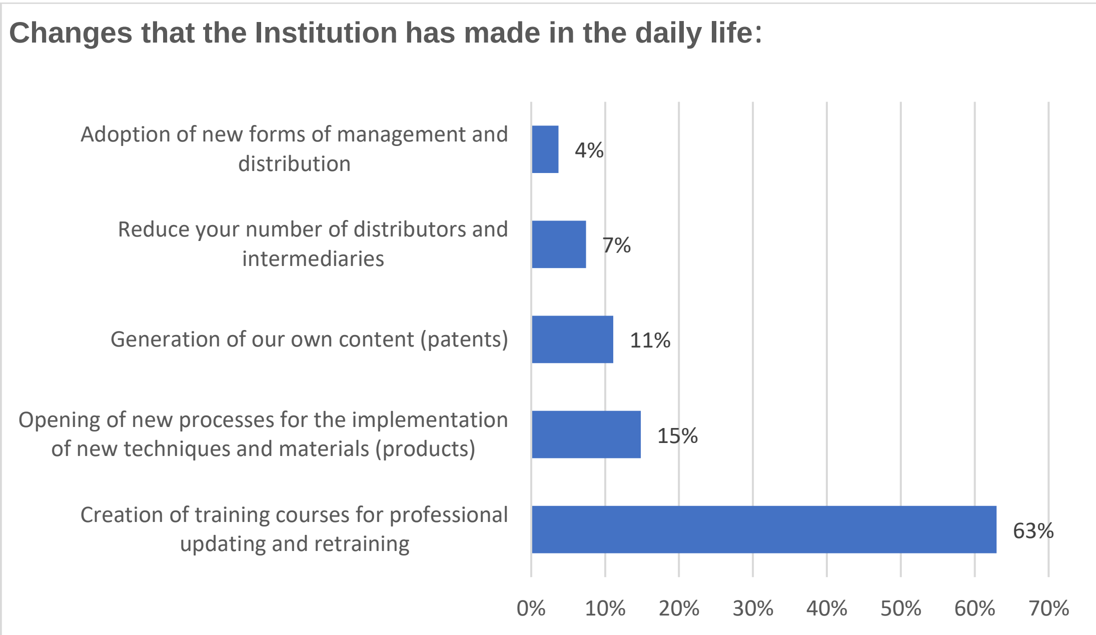
As for the companies, other new trends and tools such as geopositioning & GIS, digital payments or the use of Smart Data to personalise services are less common.

Figure 65. Type of technology being used by your institution



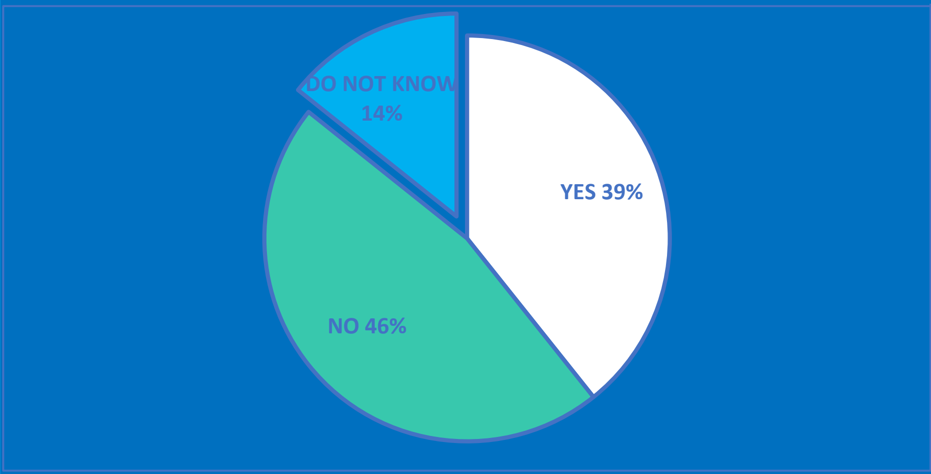
Among the changes carried out by supporting organisations to adapt to themselves to the new needs and trends, the most relevant one is linked to the adaptation of their human resources and teams, through the organisation of lifelong learning training courses (63% of the answers):

Figure 66. Please, mark if the institution has made any of the following small changes in its daily life to adapt to new needs of the market



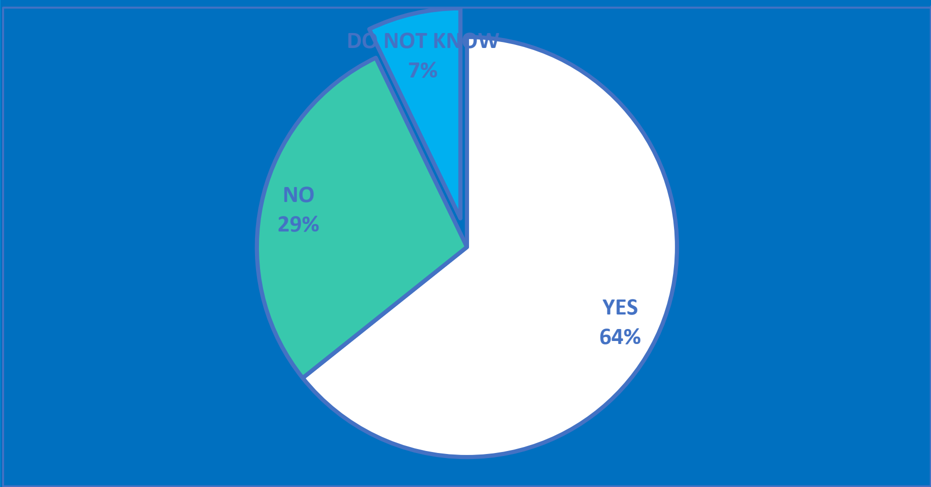
On the opposite, they haven't adopted the necessary changes in terms of management and distribution yet.

Figure 67. Does the institution have a management system that transforms knowledge into products with high added value?



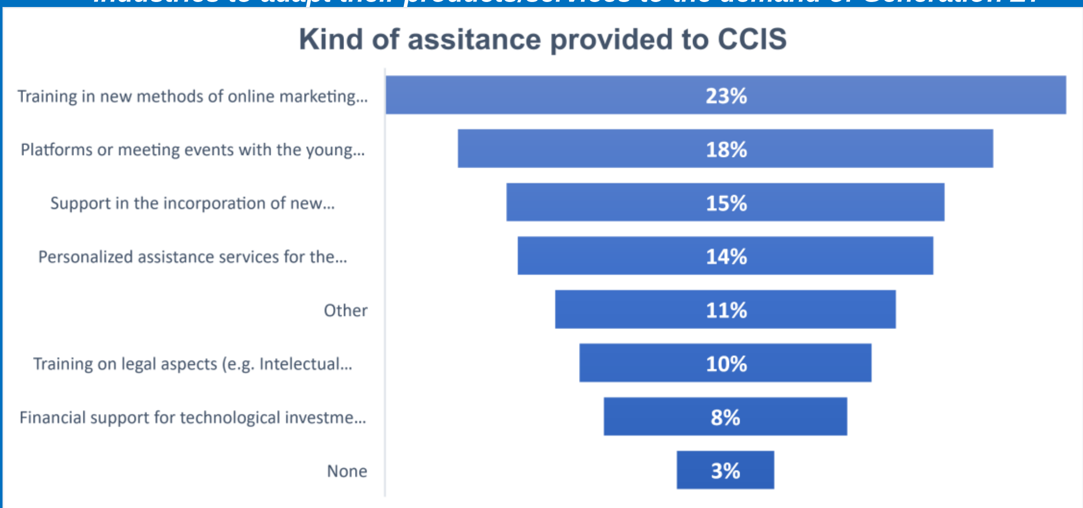
In line with the previous chart, some **60%** of institutions and organisations **do not have a management system to transform knowledge into products**.

Figure 68. Does the institution enjoy free access to university resources?



On the opposite, in the context of free resources and transfer of knowledge with universities, it seems that **a majority (64%) does enjoy of free access to universities resources.**

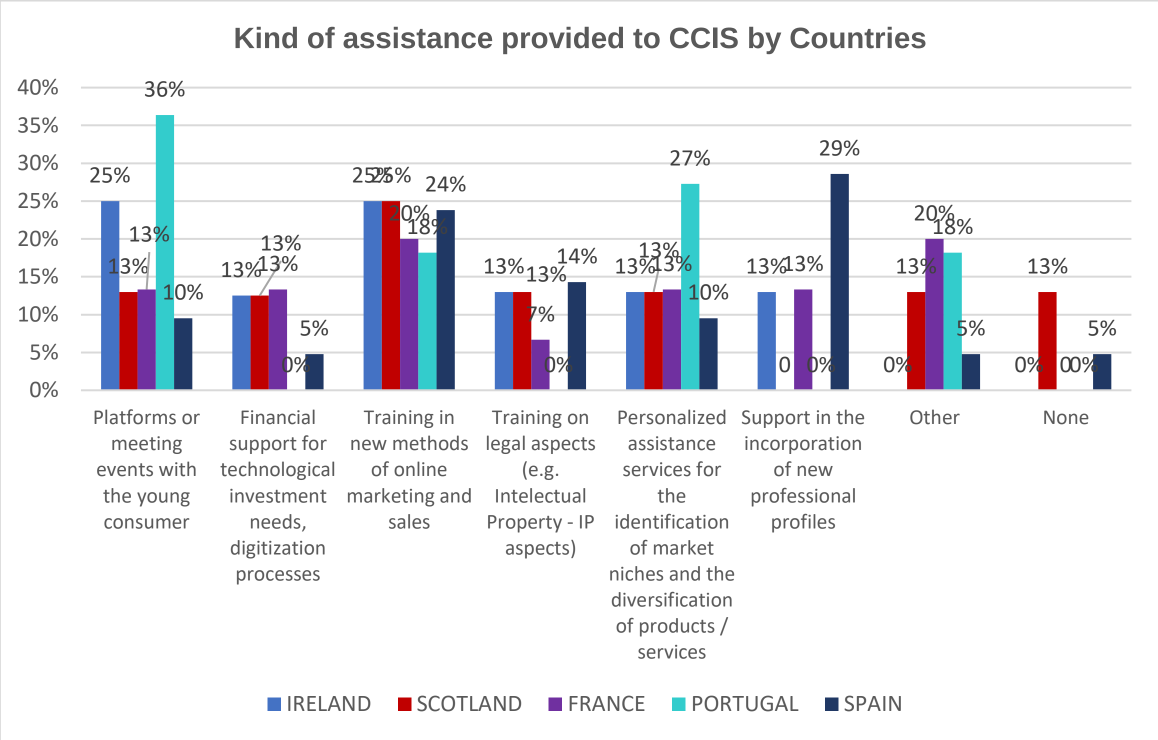
Figure 69. What kind of assistance could you provide to the Cultural and Creative Industries to adapt their products/services to the demand of Generation Z?



Somehow aligned with the needs of the companies, among the main services that supporting organisations can offer, we would find training (23%) or meeting (18%) activities.

Not that much financial support...

Figure 70. Kind of assistance provided to CCIs by partner countries of the European Atlantic Area



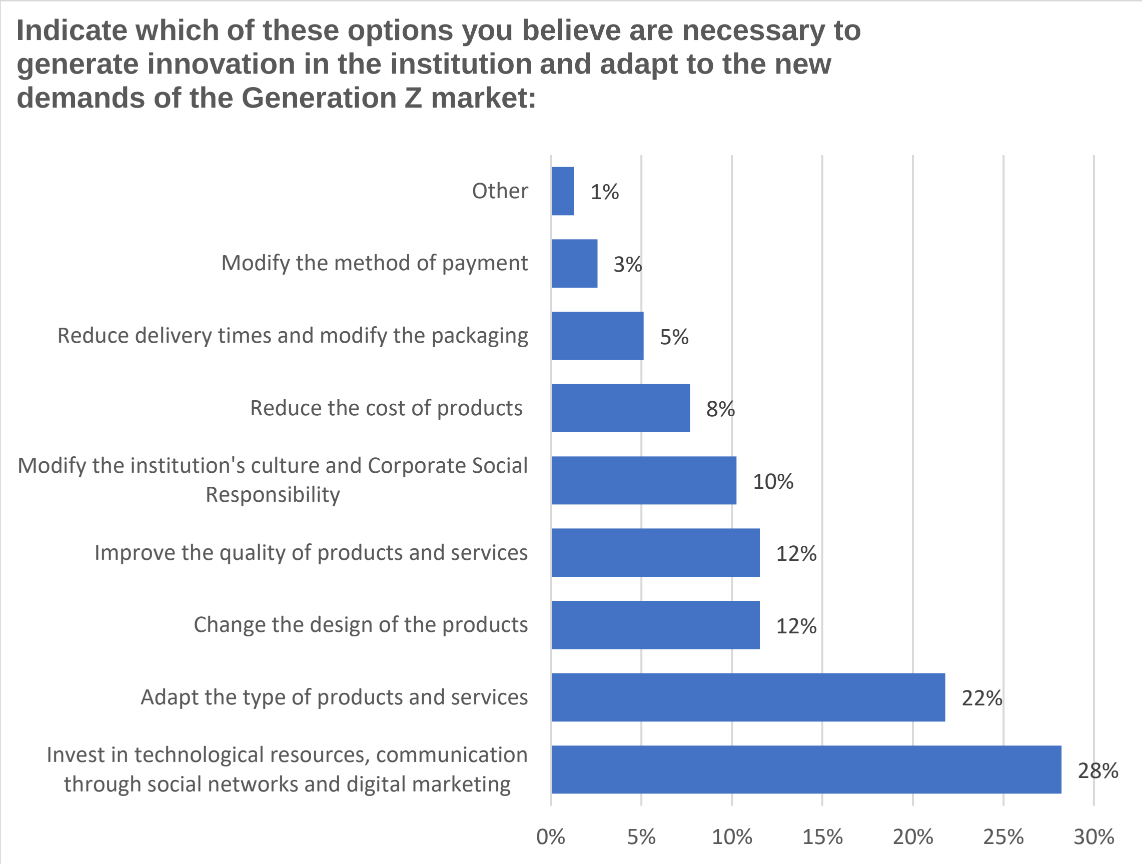
The importance of such services is slightly different depending on the geographical origin of the answers, i.e., participants from Portugal would particularly be able to offer platforms or meetings with younger consumers or personalised assistance, while the Spanish ones show abilities to support the incorporation of new profiles in the companies.

However, taking into account the fact that the nr. of answers provided is quite limited, this information shouldn't be considered as a conclusive one, and it is better to take into account gross data with all countries together as first orientations.

III. SPECIFIC NEEDS

Following a similar structure as for CCIs, the participating organisations have identified which changes are necessary to adapt their services, products and activities to Generation Z market and demands.

Figure 71. Options to generate innovation

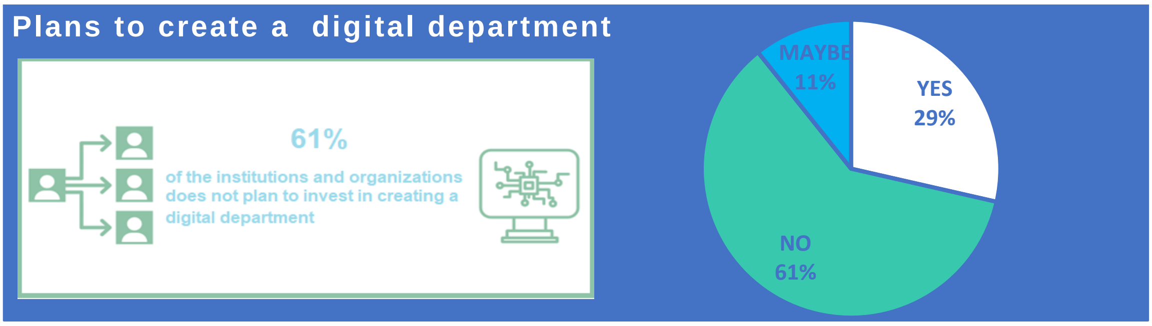


Their answers are similar as the ones from the Atlantic CCIs:

- 46% of the answers turn around the adaptation and/or improvement of the products or services (namely, 22% of adaptation, 12% of quality improvement and 12% of new design)
- On the other side, in line with their previous answers, one of their other important need is to invest in technological resources and, in particular, investments (equipment and services) orientated to digital marketing and communication issues, in order to better reach this target group (28% of the answers).
- As for the companies, the reduction of costs of the products or reduction of delivery times are not among the key fields of innovation identified by the organisations, though in their case, since they are less market-orientated, these kind of answers are more coherent with their core activities.

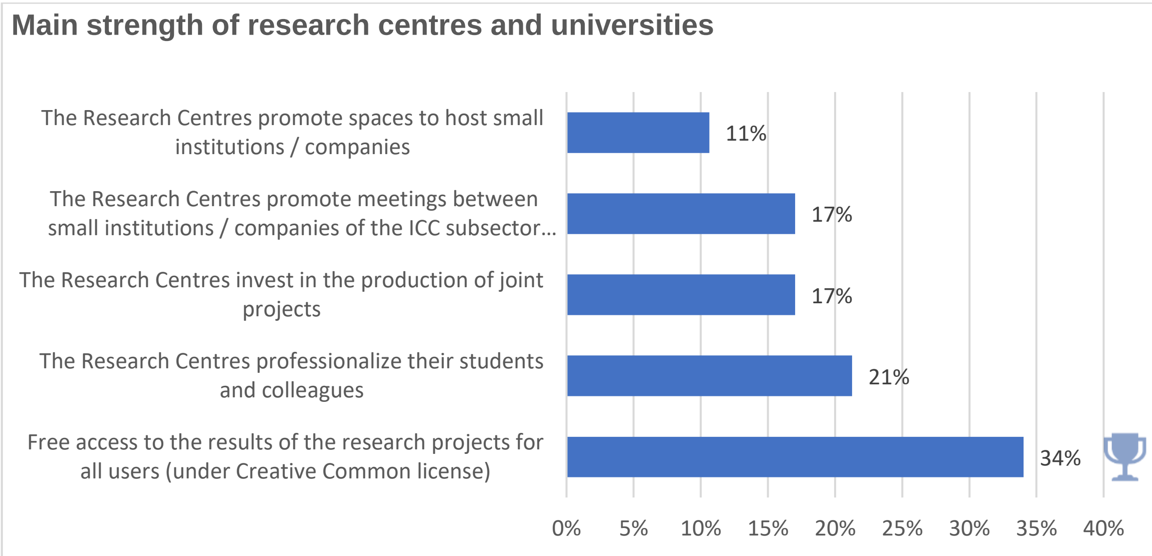
As far as the creation of some new/specific digital departments are concerned, as we can observe in the following figure, almost one third (29%) have it in mind:

Figure 72. Does the institution plan to invest or has invested in the creation of a department related to the new demands of the CCIs market? (regarding the accessibility of digital content)



As stated, more than the half of Institutions and organisations enjoy of free access to university resources (64%). In fact, with 34% of the answers, this is the first strength identified by support organisations and institutions when it comes to assess research centres and universities (34%)

Figure 73. What do you think is the main strength of research centres and universities in terms of knowledge transfer? (select all that apply)



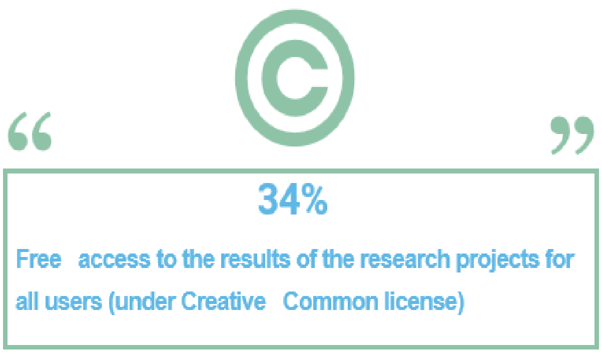
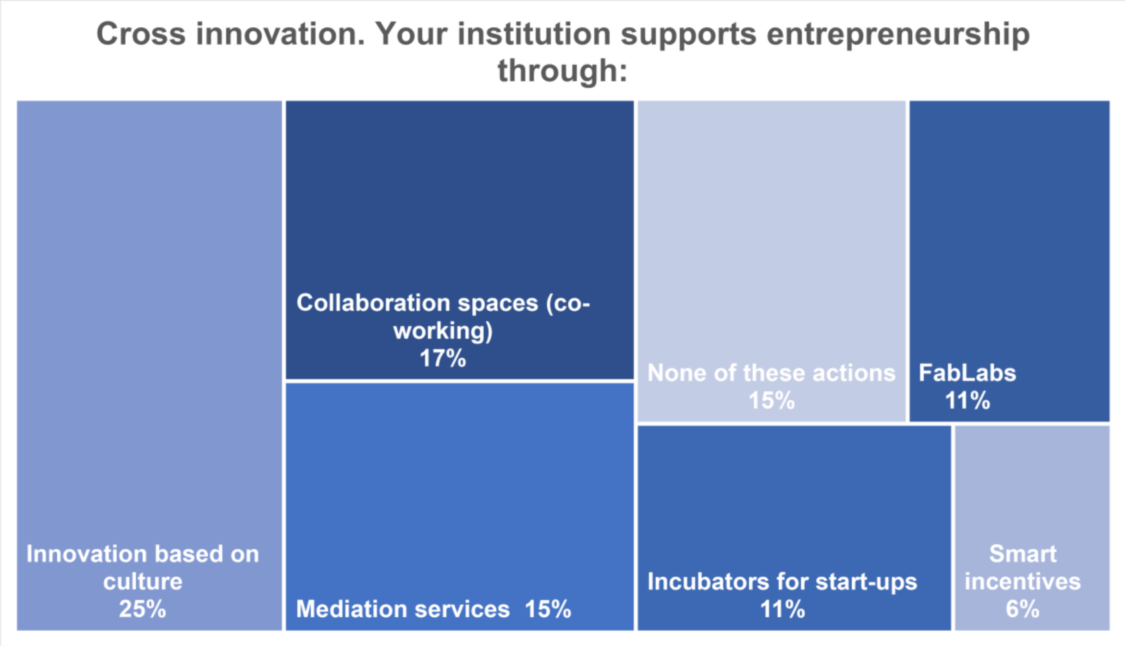


Figure 74. Cross Innovation.



To finalise, the last question of the survey referred to cross innovation and collaboration among institutions, CCIs and consumers. As we can check in this figure, institutions support entrepreneurship through innovation based on culture (processes through artistic and creative practices that generate innovation in other organizations); co-working spaces; mediation services (for example, between a traditional company from creative industry and a start-up). Smart incentives are not common support services of the organisations that have participated in the survey.

H.SWOT ANALYSIS

The following points include a brief SWOT (Strengths, Opportunities, Weaknesses and Threats) analysis and in order to help companies and institutions to identify trends and ways of cooperation, according to Generation Z profiles and needs, as well as to visualise the general position of Atlantic CCIs towards such opportunities.

They can be taken into account when planning innovation processes and new audience development strategies.

For such purpose, first of all, it can be worth briefing some of the main results obtained from Generation Z members:

1. Generation Z is not that interested in “traditional” cultural issues. They do not spend their money in cultural activities or cultural products, and prefer more participative experiences, such as the co-creation and co-design of products and services. This issue is important for institutions and companies linked to traditional matters such as museums, theatres or exhibitions.
2. They do not have a high purchase power (teenagers are persons with high financial dependence), but they do have a high influence on their family purchases.
3. They don’t like online advertisement. Almost three-fourths of Generation Z members jump the “ad” or have a pop-up blocker. This is a key consideration for companies that want to invest in online marketing or banners.
4. A majority of Generation Z pay with credit card (under parental control) or with PayPal if they bought their products on Internet. However, within the participating territories, it seems that they still prefer to by in shops instead of online.
5. When they shop online, their most favourite platforms are Amazon and eBay.
6. They spend most of the time listening to music and on learning activities.
7. Spotify is their most popular platform to listen to music.
8. In their leisure time, they prefer to go to concerts, to the cinema, play sports and to hang out with friends.
9. Among the main concerns of Generation Z, we can find the promotion of social values, in particular around equal rights, education and environmental issues.
10. Not all of them like to generate content, but if they do, they will use Youtube or Instagram.

Strengths	Weaknesses
- CCIs are composed of talented people, dynamic and with a robust capacity of faster adaptation to market trends, able to create products of interest for younger generations. - Knowledge and understanding of Generation Z, and interest in this target group. - A significant part of companies has made changes in digitalisation to adapt themselves to current digital trends. - Most of the companies use Social Media, have some digital experience and use mobile devices. - Some develop online contents, technological workshops. - Despite their size, one-third of companies have a marketing department or control strategies/plans of marketing. - Companies usually invest in quality control plan or strategy. - A large number of companies think that it is necessary to improve products and services through innovation. - Experience of the participating institutions in the development of training and supporting activities.	- Most of the companies are micro-companies with less than five employees, and one third are start-ups with less than two years since their creation. - The CCIs sector is large and diverse. There are many differences between digital and traditional companies regarding innovation strategies and capacities. - Atlantic CCIS have some shortcomings and lack of technical and business knowledge or capacities - Fragmented marked due geographical barriers, languages, taxes and duties. - High dependencies on public funds - No manifested interest, nor investment, in Smart Data management. - Lack of investment on digital payments methods. - Lack of transfer of innovation from research institutions to the companies. - Only 1% of the companies take into account the transversal issue of environment within their plans/strategies.
Opportunities	**Threats**
- Incorporate new trends and fields of interest of Generation Z in the companies' policies and activities (social commitments, environmental commitments and environmentally friendly products, digitalization, co-creation, etc.). - Subsectors like the fashion industry, videogames and travelling are of key interest for Generation Z members. - Use and transform knowledge available through Creative Commons licence - Development of new technological and digital products and services. - Development of New Business Models and Skills, incl. online Marketing issues. - Use of digital channels to reach new target audience. - Use of transmedia to take advantage of digitisation and promote co-creation projects. - B2B cooperation for co-production processes and to expand the CCIs activities to new markets and create global products. - Improve the cooperation with Research Centres and Universities towards the creation of new products and transfer of innovation.	- Companies are subject to market trends and demands with high dynamism and faster changes. - Highly competitive market, atomised and disperse. - Digital products are continually evolving, and technology rapidly becomes obsolete. It requires high investments in tech savvy and know-how. Consequently, it is necessary to be accurate with costs, inputs and outputs due to market fluctuation. - Main competitors in the digital market come from other countries and are already strongly established and creating the rules (in Social Networks, music industry, game development, etc.). - New rules around copyrights, trademarks and patents issues.

I. CONCLUSIONS AND RECOMMENDATIONS

The SWOT highlights some of the main points to give a picture of the market situation.

Companies and institutions must face the current reality of the global market to drive strategies and tactics to grow up and "*survive*" to existing and future challenges. Institutions and organisations should approach new solutions to solve problems and deal with the current demands of the society.

Business management opportunities

The results of the survey show the need for of institutions and organisations to adopt and promote new business models. They should in particular take this opportunity to assess and accompany companies so that they can develop marketing activities, products and services adapted to digitalisation trends. In particular, third organisations could provide support in some areas such as online marketing and sales, the identification of new market niches, co-design and co-creation activities and promote or build some online platform to facilitate interactions among companies and with the final customer.

From the business perspective and to generate new opportunities to attract Generation Z consumers, Atlantic CCIs should keep on investing on distribution and communication channels and reinforce their presence in social media and online marketing activities. For such purpose, in addition to technical support and training activities, some specific public funds or a better knowledge and use of existing funds, would be necessary. Throughout the current programming period, though CCIs are not included in Smart Specialisation Strategies (RIS3) of all Atlantic Area regions, in many of them the support to digitization processes does.

From a geographical perspective, co-production and cooperation encounters and activities should be promoted to take advantage of the complementarity and diversity of 4H-CREAT partnership. The partners can facilitate an extensive network of transnational contacts to accede to new markets and channels of distribution. Digitalisation should also provide more opportunities towards the accessibility to global markets. However, it should be reminded that most of traditional companies are mostly interested in local market, and that the size of the companies and language issues can be an important challenge towards their internationalisation.

Innovation and transfer of knowledge

The sample of answers obtained from companies might be too diverse as far as the subsectors of CCIs are concerned, but still provides many ideas and trends around the current situation and necessities in terms of innovation and transfer of knowledge. Such kind of investments might generate many questions and fears for small-size companies, but opens a wide range of possibilities in terms of B2B cooperation and for the development of new processes. The participants have demonstrated that there is still a lack of habits in terms of business and institutional cooperation, especially when it comes to the development of new business lines.

Changes related to culture are among the most challenging ones of a society, and should be taken into account. To innovate involves cultural changes and is thus not easy to achieve. Institutions and public administrations must focus in creating "win-win strategies" and new tools public-private-partnership (PPP) cooperation in the CCIs, such as the support to spin offs, incubators or labs.

On the other hand, many companies do not feel that the public sector can really support them, especially when it comes to the creation of new products or services. As for other economic sectors, innovation developed by research centres and institutions, including academic ones, have not been carried out side-by-side with cultural and creative companies, nor with the final consumers. Neither CCIs companies nor Generation Z final users feel part of innovation ecosystem. In general, they are not aware of the benefit from networking activities. There is thus a necessity to work together and coordinate objectives, resources and skills. Innovation already includes a wide range of fields: R+D+I; technology; digitalisation; design; creativity; social and environmental innovation; or internationalisation.

More specifically, and according to the Atlantic CCIs demands and needs, in order to help them to adapt their businesses to Generation Z consumers and new digital trends, some of the PPP activities and services that could be promoted by public and private institutions could turn around, e.g.:

- The promotion of B2C meetings and events to work with Generation Z, including some support in co-creation and co-design activities.
- The promotion of transnational B2B meetings to promote co-productions and the development of joint projects/products
- The inclusion of CCIs in the regional innovation ecosystems and of networking activities and tools with Research Centres and Universities.
- To carry out personalised innovation and internationalisation diagnostics
- To promote training activities, workshops and events around RTD issues, Digitisation, Smart Data management, Transmedia or online Marketing.
- To support the development of clusters, spin-offs and specialised infrastructures such as incubators or labs.
- To increase financial supports available for companies to undertake the necessary technological investment

Such kind of business support activities can and should be launched in a short to mid-term perspective and as ongoing efforts, taking into account the fast changes of digitally-linked markets and consumers.

From a long-term perspective, younger and new generations should be a constant target group for the Atlantic Cultural and Creative Industries, that should work with public and private institutions to anticipate, identify new challenges to come, and adapt themselves to such kind of consumers habits and demands.

J. FIGURES INDEX

K. SOURCES

- Atrevía. (2018). Generación Z. El dilema. Resumen ejecutivo. Deusto Business School.
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L. ANEXES

I. SURVEY FOR GENERATION Z

FIRST SECTION. IDENTIFICATION DATA.

- Age: Choose an element
- GenderChoose an element from the list.
- City:
- Region: Haute-Normandie
- Nationality Other nationality:
- Current situation: I work☐ I study ☐Neither studying nor working☐
- Type of studies: ☐ School☐ High/secundary school ☐ ☐ Other Specify)
- Type of the centre: ☐ Public☐Private☐Public-private partnership

SECTION SECOND. LEISURE AND SPARE TIME OF GENERATION Z.

1. In your weekly spare time, how many hours do you take part on the following leisure activities?

Activity	*Less than 1 hour*	*Between 1 and 3 hours*	*3-6 hours*	*6-9 hours*	*9-15 hours*	*More than 15 hours*
Watch TV	☐	☐	☐	☐	☐	☐
Go to cultural activities (Gigs, concerts, museums…)	☐	☐	☐	☐	☐	☐
Play online games	☐	☐	☐	☐	☐	☐
Play traditional video games	☐	☐	☐	☐	☐	☐
Follow Blogs and social networks	☐	☐	☐	☐	☐	☐
Surf the Internet	☐	☐	☐	☐	☐	☐
Play Sports	☐	☐	☐	☐	☐	☐
Visit Friends or relatives	☐	☐	☐	☐	☐	☐
Listen Music	☐	☐	☐	☐	☐	☐
Communicate with others through social networks	☐	☐	☐	☐	☐	☐
Shopping	☐	☐	☐	☐	☐	☐
Learning activities	☐	☐	☐	☐	☐	☐
Reading	☐	☐	☐	☐	☐	☐
Do art (painting, Dance Photography, music...)	☐	☐	☐	☐	☐	☐
Volunteer activities	☐	☐	☐	☐	☐	☐
Visit Outdoor Spaces	☐	☐	☐	☐	☐	☐
Eat out	☐	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐	☐

2. **¿Do you know the range of cultural and leisures activities of your City (concerts, shows, museums, theatres, exhibitions, Etc.)?**

◯ Yes

◌ No

◌ Partially

3. **How do you usually find out about the cultural events o leisure activities of your city?**

Mailing (subscriptions) ☐

Parents ☐

Friends ☐

Magazines and press ☐

Institute or university ☐

Internet ☐

Social networks ☐

Others ☐

4. **If you are interested in attending cultural activities, please rate your preferences from 1 to 5 1= Not interested /5 = Really interested)**

Activity	Nothing interested	Uninterested	Moderately interested	Very interested	Extremely interested
Go to the museum or theatre	☐	☐	☐	☐	☐
Go to the cinema	☐	☐	☐	☐	☐
See exhibitions	☐	☐	☐	☐	☐
Go to concerts/ festivals/Gigs	☐	☐	☐	☐	☐
Eat out					
Outdoor activities (forest, parks…)					
Shopping					
Sport activities					
Support local artist					
Events with freebes (food testing, bar opening…)					

5. **Who do you attend cultural activities with?**

☐ Friends
☐ Parents
☐ Other family members
☐ Teachers

6. **What do you think stops young people attending cultural activities?**

☐ Because they are not interested
☐ Lack of knowledge about events
☐ Lack of guides and moderators
☐ Lack of surprise
☐ Too many rules and prohibitions
☐ Lack of interactivity
☐ Little Stimulation

☐ Lack of modernization
☐ Cost
☐ does not suit my tastes/ lack of activities for my age
☐ I do not have anyone to go there with me

7. **Would you like theatres and museums were more participatory?**

◉ Yes

◯ Ns/Nc

THIRD SECTION. PRODUCTS OF CONSUMPTION AND LIFESTYLE

8. **Select the social networks and/or applications you normally use:**

☐ Snapchat
☐ Twitter
☐ Facebook
☐ Musical.ly
☐ Flickair
☐ Instagram
☐ Wassap
☐ Came
☐ Viber
☐ Skype
☐ Google Hangout
☐ Youtube
☐ Tumblr
☐ Reddit
☐ Other (Specify which one)

9. **What kind/genre of videogames do you like?**

☐ Sport
☐ Dance
☐ Fight
☐ Vehicle/carreras
☐ Serious Game (e.g. geography, history, Trivial, etc.)
☐ Other (SpecifiCar Which one)
☐ Strategy
☐ Role-playing games
☐ Wars
☐ Singing
☐ Construction
☐ None

10. **Choose the photography application you normally use:**

☐ Photoshop
☐ Whisper
☐ Instagram
☐ Flickr
☐ Google Photos
☐ Snapfish/Snapchat
☐ Pinterest
☐ Thumbrl
☐ Other Specify
☐ None

11. **Select the platforms you have to listen music:**

☐ Spotify
☐ Google Play Music
☐ Musica.ly
☐ Soundcloud
☐ Myspace
☐ Shazam
☐ Amazon Music
☐ Itunes
☐ 8tracks
☐CDs
☐ Musi
☐ Pandora
☐ Deezer
☐ Radio and Television
☐Other Specify

12. **What are your favorite movies/shows?**

Write a maximum of five.

13. **Mark from 1 to 5 your preferences in terms of spending your money (1 less Expenditure and 5 more expenditure)**

Material	*1*	*2*	*3*	*4*	*5*

Clothes	☐	☐	☐	☐	☐
Toys	☐	☐	☐	☐	☐
Video games	☐	☐	☐	☐	☐
Applications and Softwares	☐	☐	☐	☐	☐
Education Online	☐	☐	☐	☐	☐
E-Books	☐	☐	☐	☐	☐
Traditional books	☐	☐	☐	☐	☐
Jewelry	☐	☐	☐	☐	☐
Movies and Entertainment	☐	☐	☐	☐	☐
Travel	☐	☐	☐	☐	☐
Equipment Electronic Virtual (glasses, Drones Etc.).	☐	☐	☐	☐	☐
Other (Specify which/es)	☐	☐	☐	☐	☐

15. What are your criteria when buying something?

☐ Exclusivity
☐ Design
☐ Brand
☐ Quality
☐ Price
☐ Recommendations

16. What kind of books do you like to read? (E.g.: Novels, Horror, Literature, Thrillers, Fiction, Police, Comics...)

Click or press here to type text.

17. Where do you prefer to buy?

☐ On-Line
☐ In the shop, physically

18. Write three online shopping platforms:

Click or press here to type text.

19. What methods of payment do you use for your purchases:

☐ Paypal
☐ Online banking transfers
☐ Debit/credit cards
☐ Postage due
☐ Other method (Specify Which one)

20. What is your opinion about the online advertisement?

☐ I have activated a Blocker of Pop-ups
☐ I jump the ad whenever I can
☐ I usually whatch the ads if they are funny and cool
☐ I see them whole almost always and always

22. If you had an extra 200 euros, what would you spend it on?

☐ Technology
☐ Save them
☐ Sports
☐ Training and studies
☐ Travel

☐ Hang out with Friends
☐ Clothes
☐ Cultural activities (concerts, exhibitions…)
☐ Books

FOURTH SECTION. ENTREPRENEURSHIP AND TRENDS

23. What attributes best describe you

☐Affectionate	☐Self	☐Intellectual
☐Cheerful	☐Polite	☐Ordered
☐ Motivated	☐Honest	☐Logical
☐Ambitious	☐Independent	☐Compliant
☐Able	☐Creative	☐Responsible
☐Helpful	☐Brave	☐Tolerant

24. Point out your interested topics (from 1, Not interested to 5, Very interested)

Subject	*1*	*2*	*3*	*4*	*5*
Human rights	☐	☐	☐	☐	☐
Pensions	☐	☐	☐	☐	☐
Immigration	☐	☐	☐	☐	☐
Environment	☐	☐	☐	☐	☐
Gender equality	☐	☐	☐	☐	☐
Political corruption	☐	☐	☐	☐	☐
Discrimination	☐	☐	☐	☐	☐
Education	☐	☐	☐	☐	☐
Cultural and leisure topics	☐	☐	☐	☐	☐
Economics and Finance	☐	☐	☐	☐	☐
Fashion	☐	☐	☐	☐	☐
Technology	☐	☐	☐	☐	☐
Celebrities	☐	☐	☐	☐	☐
Sports	☐	☐	☐	☐	☐

25. Do you like to generate content for the internet?

○ Yes

○ No

26. If yes, How?

☐ Own Blog
☐Youtube Channel
☐Own Website

27. Who are your favorite influencers?

Write a maximum of 5.

26. Who do you take advices from…

☐ Parents
☐ Other family members
☐ Internet forums/Blogs
☐ Friends

☐ Teachers

27. How do you see yourself in the future?

☐ Running my own business

☐ Studying a career with a vocation

☐ Working for a company

☐ I do not think about the future

Thanks for your cooperation!

II. SURVEY FOR CULTURAL AND CREATIVE INDUSTRIES

The present questionnaire refers to the the development of new business development, products and processes of creative industries for their adaptation to the demands and needs of the Generation Z target groups

FIRST SECTION. IDENTIFICATION DATA.

1.Name of the company

2. Sector (*Mark only one oval).*

- ☐ Advertising
- ☐ Architecture & Industrial Design
- ☐ Antiques,
- ☐ Sculptures
- ☐ Broadcasting (TV/radio)
- ☐ Video, audio, Film Graphic design Crafts
- ☐ Writing & publishing
- ☐ Web design,
- ☐ Multimedia, Transmedia
- ☐ Digital Arts
- ☐ Gaming/animation
- ☐ Designer fashion
- ☐ Music
- ☐ Photography
- ☐ Dance/ballet
- ☐ Events/Festivals
- ☐ Fine art
- ☐ Museums & galleries Orchestras/music conservatoires Theatre
- ☐ Creative Cooking Academic
- ☐ Tech devices
- ☐ Social media & Influencers Virtual reality
- ☐ Apps development
- ☐ Others

3. Total number of employees (*Mark only one oval).*

- ☐ 0-5
- ☐ 5-10
- ☐ 10-30
- ☐ 30-50
- ☐ 50-100
- ☐ 100-250
- ☐ More than 250

4.Number of creative employees

5. Number of non-creative employees

6. Type of company (*Mark only one oval)*

- [ ] Creator of content
- [ ] Producer of content
- [ ] Distributor
- [ ] Intermediary

7.**Location (city)**

8.Region

9.**Number of branch offices**

10. Location(s) of the Branch office (s)

11.Year of creation (*Mark only one oval).*

- [ ] Less than one year
- [ ] Between 1 and 2 years
- [ ] Between 3 and 4 years
- [ ] Between 5 and 9 years
- [ ] Between 9 and 19 years
- [ ] More than 20 years

SECOND SECTION: GENERATION Z

Do you know what Generation Z means? ***Mark only one oval.***

- Yes
- No
- Maybe

13.Are you interested in this market niche/target audience (people born between mid-1990s and mid-2000s)?***Mark only one oval.***

- Yes
- No *Skip to question 21.*
- Maybe

MARKET TRENDS

14.Has the company made changes to adapt its business activity to the current digital trends, in particular towards the Generation Z? ***Mark only one oval.***

- Yes

- No
- Maybe/I do not know

15.If yes, mention what products or services are available to the Generation Z target audience:

16. Does the company have, or plan to launch, new growth models aimed at Generation Z, including: *Tick all that apply.*

- Diversification of activities, products, services for the younger public/target audience
- Expansion into new geographical markets
- Cooperation with other companies through co-productions, franchises and / or joint-ventures
- Creation of new digital products
- There is no clear growth strategy aimed at Generation Z
- Other:

17.**If you have not adapted your company to this new niche market yet, is there any disposition to create new processes or lines of internal improvement towards the acquisition of new customers belonging to Generation Z?** ***Mark only one oval.***

- Yes
- No
- Maybe/I do not know

18.Indicate which of these options you believe are necessary to generate innovation in the company and adapt to the new demands of the Generation Z market: ***Tick all that apply.***

- Modify the company's culture and Corporate Social Responsibility
- Invest in technological resources, communication through social networks and digital marketing
- Improve the quality of products and services Adapt the type of products and services
- Change the design of the products
- Reduce the cost of products Modify the method of payment
- Reduce delivery times and modify the packaging
- Other

19. In general, what do you know about the demands of Generation Z?

20.**What kind of assistance would you need to receive in order to adapt your products / services to meet the demand of Generation Z?***Tick all that apply.*

- Platforms or meeting events with the young consumer
- Financial support for technological investment needs, digitization processes
- Training in new methods of online marketing and sales
- Training on legal aspects (e.g. Intelectual Property - IP aspects)
- Personalized assistance services for the identification of market niches and the diversification of my products / services

- Support in the incorporation of new professional profiles
- Other
- Business Model and culture of innovation

21.Do you have the following departments / controls / strategies?*Tick all that apply.*

- Quality Control Plan
- Environmental Quality Control Corporate
- Social Responsability
- Staff training plan
- R&D Department
- Marketing Department
- Internationalization Department

22.Does the company try to involve all its staff in its short and long-term innovation strategies?*Mark only one oval.*

- Yes
- No
- I do not know

23. What percentage of time do you devote weekly to e.g. brainstorming and exchange of ideas activities?*Mark only one oval.*

- 0%
- Around 5%
- More than 10%
- Around 20% or more

24.Indicate the types of technology being used by your company to conduct its business (multiple options):*Tick all that apply.*

- Mobile devices
- Mobile applications
- Internet of things
- Big Data / Personalization of services and data mining for tracking and
- Consumption guidelines
- Geopositioning and beacons
- Security
- Digital payments
- Other type of technology

25.Does the company use co-creation techniques and actions through the participation and feedback of users before the launch of products or services. *Mark only one oval.*

- Yes
- No
- No, but this could be of interest
- Maybe

26.Does the company have collaborative platforms with the users to manage recommendations and suggestions through social networks?*Mark only one oval.*

- Yes
- No
- No, but this could be of interest
- Maybe

27. Does the company collaborate (or does it intend to collaborate with) with the following organizations: ***Tick all that apply.***

28.Select from the following phrases those that correspond to your connection with the previous organizations:*Tick all that apply.*

- We have staff working in their facilities
- We have developed joint projects, including presentations, exhibitions or workshops
- We have participated in workshops aimed at promoting knowledge
- We have contributed to the content of training courses promoted by these organizations
- We have participated in meetings organized by them
- We have patents, trademarks or designs shared with them
- Our company is established in a technology/research center or in an incubator, start-up hub, etc.

29. What kind of support would you most like to receive from intermediate organizations to increase the potential of innovation of your company?*Tick all that apply.*

- Technical knowledge: technical skills, know-how, staff, interdisciplinary solutions to problems;
- Business knowledge: business skills, accounting, entrepreneurship and management;
- Sociocultural knowledge: social trends, current political issues, cultural trends;
- Aesthetic knowledge: symbolic codes of different artistic worlds, current aesthetic taste, etc.

30.**What do you think is the main weakness of the Research Centers and the Universities in terms of knowledge transfer? (select all that apply)***Tick all that apply.*

- The results of the research are not communicated in an accessible way. It is particularly difficult for us to access to that kind of information
- They do not invest enough in the production of joint projects
- They do not promote meetings between small institutions / companies in the subsector to facilitate the flow of knowledge
- They do not professionalize enough their students and colleagues
- They do not promote enough space to host small institutions/companies

31.Does the company usually collaborates with:***Tick all that apply.***

- [ ] Other companies in co-production processes
- [ ] Other companies for distribution and / or communication processes
- [ ] Other companies for innovation processes
- [ ] Other public institutions in co-production processes
- [ ] Other public institutions for distribution and / or communication processes
- [ ] Other research or academic institutions for innovation processes

NEXT MEETING IN THE TRANSACTIONAL VIRTUAL FAIR

On Tuesday 16th and Wednesday 17th of October, in the framework of the 4H- CREAT project, we will organize a virtual fair to promote meetings between companies and institutions from the cultural and creative sector in Spain, France, Ireland, Portugal and the United Kingdom. The participating companies can have free-of-charge (online) stands. Would you be interested in participating? *Mark only one oval.*

- ○ Yes
- ○ No
- ○ Maybe

33.If you are interested in joining such event, please give us your contact details (e-mail and phone) to be able to contact you.

III. SURVEY FOR INSTITUTIONS AND ORGANISATIONS

ORGANISATION PROFILE

1. Name of the institution

2. Entity type

- ☐ Business association
- ☐ Chamber of Commerce
- ☐ Scientific and professional association
- ☐ Ministry/Central Government
- ☐ Regional Government
- ☐ Local Administration
- ☐ Public University
- ☐ Private University
- ☐ Science and Technology Park
- ☐ Technology and/or research centre
- ☐ European Business Innovation Centre
- ☐ Patent and Trademark agency
- ☐ Office for the transmission of knowledge

3. Number of employees

- ☐ 0-5
- ☐ 5-10
- ☐ 10-30
- ☐ 30-50
- ☐ 50-100
- ☐ 100-250
- ☐ More than 250

4.**Number of creative employees. Short-answer text**

5.Number of non-creative employees- Short-answer text

6.Number of employees dedicated to R+D+I-Short-answer text

7.Country

8.Web

GENERATION Z AND INNOVATION CULTURE.

9.Do you know what Generation Z means?

- Yes
- No
- Maybe

10.Is your institution interested in this market niche/target audience (people born between mid-1990s and mid-2000s)?

- Yes
- No
- Maybe/I don't know

11.Has your institution developed or is it developing new products, services or research focused on Generation Z?

- Yes
- No
- Maybe/I don't know

12.Is your institution linked to companies that produce products or services for Generation Z?

- Yes
- No
- Maybe/I do not know

13.Indicate which of these options you believe are necessary to generate innovation in the institution and adapt to the new

- [ ] Modify the institution's culture and Corporate Social Responsibility
- [ ] Invest in technological resources, communication through social networks and digital marketing
- [ ] Improve the quality of products and services
- [ ] Adapt the type of products and services
- [ ] Change the design of the products
- [ ] Reduce the cost of products
- [ ] Modify the method of payment
- [ ] Reduce delivery times and modify the packaging
- [ ] Other

14.In general, what do you know about the demands of Generation Z?Long-answer text

15.What kind of assistance could you provide to the Cultural andCreative insutries?

- [ ] Platforms or meeting events with the young consumer
- [ ] Financial support for technological investment needs, digitization processes

- Training in new methods of online marketing and sales
- Training on legal aspects (e.g. Intelectual Property - IP aspects)
- Personalized assistance services for the identification of market niches and the diversification of activities
- Support in the incorporation of new professional profiles
- Other
- None

16.Please, Indicate the types of technology being used by your institution to conduct its business (multiple options):

- Geographic information systems (GIS) and Open Data
- Mobile applications
- Internet of things
- Big Data / personalization of services
- Geopositioning and beacons
- Security
- Social networks and digital marketing
- Digital payment
- Other type of technology

17.Please, mark if the institution has made any of the following small changes in its daily life to adopt new needs of the market

- Reduce your number of distributors and intermediaries
- Creation of training courses for professional updating and retraining
- Generation of our own content (patents)
- Opening of new processes for the implementation of new techniques and materials (products)
- Adoption of new forms of management and distribution

18.Does the institution plan to invest or has invested in the creation of a department related to the new demands of the Cultural and Creative Industries market? (regarding the accessibility of digital

- Yes
- No
- Don't know/Maybe

19.Does the institution enjoy free access to university resources?

- Yes
- No
- Don't know/Maybe

CO-CREATION, COLLABORATION AND TRANSFER OF KNOWLEDGE

20. The institution usually collaborates with the following

- Companies from the cultural and creative industries sectors

- Business Associations
- Chambers of Commerce
- Scientific and professional associations
- Regional Government
- Local administration
- Public Universities
- Private Universities
- Science and technology parks
- Technological and/or research centres
- European Business Innovation Centres
- Patent and trademark agencies
- Knowledge transfer offices
- Other

21. Has the institution developed joint projects with creative industries and universities (including workshops and conferences)?

- Yes
- No
- Maybe/I do not know

22.What do you think is the main strength of research centres and universities in terms of knowledge transfer? (select all that apply)

- Free access to the results of the research projects for all users (under Creative Common license
- The Research Centres invest in the production of joint projects
- The Research Centres promote meetings between small institutions / companies of the CCI sub
- The Research Centres professionalize their students and colleagues
- The Research Centres promote spaces to host small institutions / companies
- None

CROSS INNOVATION.

23.Your institution supports entrepreneurship

- Collaboration spaces (co-working)
- FabLabs
- Incubators for start-ups
- Mediation services (for example, between a traditional company from creative industry and a startup
- Innovation based on culture (processes through artistic and creative practices that generate innovation
- Smart incentives
- None of these actions

24. Is the institution interested in cooperating and collaborating with the creative industries to create new projects and events?

- Yes
- No
- Maybe/I do not know

NEXT MEETING IN THE TRANSACTIONAL VIRTUAL FAIR

25. On Tuesday 16th and Wednesday 17th of October, in the framework of the 4H-CREAT project, we will organize a virtual fair to promote meetings between companies and institutions from the cultural and creative sector in Spain, France, Ireland, Portugal and the United Kingdom. The participating companies can have free-of-

- Yes
- No
- Maybe/ I do not Know

If you are interested in joining such event, please give us your contact details (e-mail and phone) to be able to contact you:

....

Thanks for your cooperation!