

Evaluation of Design for Business – Survey Research on Business Needs and Follow-Up Discussions

A report prepared for *emda*

PACEC – Public and Corporate Economic Consultants

August 2008

This work, with the exception of logos, photographs and images and any other content marked with a separate copyright notice, is licensed under a [Creative Commons Attribution 2.0 UK: England & Wales License](https://creativecommons.org/licenses/by/2.0/uk/)

The use of logos in the work is licensed for use only on non-derivative copies. Under this licence you are free to copy this work and to make derivative works as long as you give the original author credit.

The copyright is owned by Nottingham Trent University.



This document forms part of the *emda* Knowledge Bank

**Evaluation of Design for
Business**

**Survey Research on
Business Needs and Follow-
Up Discussions**

A report prepared by

PACEC

on behalf of
emda

PACEC

Public and Corporate
Economic Consultants
www.pacec.co.uk

49-53 Regent Street
Cambridge CB2 1AB
Tel: 01223 311649
Fax: 01223 362913

504 Linen Hall
162-168 Regent Street
London W1R 5TB
Tel: 020 7734 6699
Fax: 020 7434 0357

e-mail: admin@pacec.co.uk

August 2008

Ref: H:\0802\04EMDA\Rep\Final\Draft Final.doc

Contents

Executive Summary.....	2
X1 Introduction.....	2
X2 Survey of Businesses.....	2
1 Introduction and Methodology.....	5
1.1 Introduction.....	5
1.2 Methodology.....	5
2 Background and Characteristics of Businesses.....	7
3 The Definition and Importance of Design.....	11
4 Barriers to Design.....	13
5 Design Practices.....	14
6 Design Support Needs.....	21
7 Follow up interviews with Businesses.....	30
7.2 Barriers to Design.....	30
7.3 Specific Design Support Needs.....	32
7.4 Experience / Skills of Design Consultants to Meet Needs.....	33
8 Conclusions.....	35
8.1 Survey of Businesses.....	35
Appendix A Survey Results Disaggregated by Industrial Sector.....	38
A1 Introduction.....	38
A2 Respondent's Background and Characteristics.....	38
A3 The Definition and Importance of Design.....	41
A4 Barriers to Design.....	42
A5 Design Practices.....	44
A6 Design Support Needs.....	49
Appendix B Survey Results Disaggregated by County.....	57
B1 Respondent's Background and Characteristics.....	57
B2 The Definition and Importance of Design.....	61
B3 Barriers to Design.....	62
B4 Design Practices.....	63
B5 Design Support Needs.....	68

Executive Summary

X1 Introduction

X1.1 In February 2008, *emda* commissioned Public & Corporate Economic Consultants (PACEC) to develop a programme of support for integrating design into SMEs, including an analysis of design needs and the identification of additional/intensive support interventions required by businesses. This report outlines the findings of PACEC's survey research with businesses in the East Midlands and the follow-up discussions with a selection of businesses on the support they may require in the near future.

X1.2 The information from businesses has been obtained via a structured interview with 900 businesses in the East Midlands to establish information on current use of design and design support, followed by additional qualitative follow-up interviews with certain of those businesses which indicated that they may require design advice in future.

X2 Survey of Businesses

X2.1 The main results from the survey of businesses are as follows:

- 45% of East Midlands businesses have grown moderately over the past 3 years, and 40% have stayed the same size. 57% of businesses aim to grow moderately, and 34% to stay the same size.
- Definitions of design vary between firms. The most common definitions were:
 - **“Design is about marketing/advertising (including websites)” (41%)**
 - **“Design is about promoting/branding the company” (38%)**
 - **“Design is about products/services looking attractive” (37%)**
 - **“Design is about working well to meet client needs” (35%).**

Comparatively few respondents (23%) said that design was used to develop products and services.

- **26% of respondents said that design had a significant role** to play in their business, and 17% that it was integral to the firm's operation.
- The **most common barriers** to businesses using design and innovation were **cost, or finance in general (13%)**, lack of time (9%), and lack of skills (8%).
- While 43% of respondents reported no design activity, 17% employ an external design consultant when needed, 17% have their own internal designers but not a dedicated team or department, and 12% have a dedicated design team/department.
- 31% of respondents have developed or introduced new products, services, or processes in the last 3 years. 11% of respondents have developed or introduced new products, services, or processes **involving major innovation or design** in the last 3 years.
- 22% of firms have used external design advice in the last 3 years. Among these, the most common sources were other firms (34%), private design consultants (25%), and friends/colleagues (19%).

- **The most common design advice issues were marketing or advertising, including websites (53%),** promotion and branding (28%), product development (26%), and service development (17%).
- Only 3% of those firms which had not used external design advice had sought it but not proceeded to use it.
- **37% of businesses thought that design would become more important over the next 3 years** in enabling the company to enhance or maintain a competitive position.
- 30% of businesses are likely to be developing existing or new **products or services** in the next 3 years, and 13% of businesses are likely to be developing existing or new **processes** in the next 3 years.
- **Some 23% of businesses thought they would require design advice in the next three years.** 10% of businesses thought that they possibly would, 7% that they probably would, and 6% that they definitely would.
- 63% of companies thought that they would probably not require design advice over the next 3 years. The remaining 14% were unsure.
- Among the 23% who definitely, probably, or possibly would require design advice:
 - **The most common requirements for advice were on marketing and advertising (including website design) (60%), promotion and branding (44%), product development (26%), and service development (17%).**
 - **25% said the support would include significant innovation, 32% advanced or new technologies, 25% advanced or new materials.**
 - **63% required better information on the design support available**
 - **48% one to one sought advice, and 36% workshops with businesses facing similar issues**
 - **One to one advice was typically envisaged as initial or light touch (by 81%), to be delivered at the business premises, by a general design consultant**
 - **19% sought in-depth support**
 - **89% required 1 to 2 days of one to one support and 11% required more than 2 days**
- The best ways to inform businesses about the design advice available were reported to be mailshots (30% of respondents), e-mail (22%), telephone contact (18%), and face-to-face discussions with an advisor (9%).
- In terms of the more detailed review of design needs which focused on those who required support at the time of the survey and over the next three years the main issues and requirements through the follow-up discussions were:
 - **Skills:** design skills, namely website design, graphic design, electronic design, design for high tech devices were on top of the list. Specific design IT skills were also an issue in some cases
 - **The cost: the need for grants was of paramount importance.** Grants were needed because firms could not afford the cost of bank loans and overdraft or simply could not access them
 - **Lack of time:** businesses said that it was mainly the lack of time to look for support and information about design and designers that was an issue
 - **External advice:** firms found it difficult to find external design expertise in a number of areas namely 3D modelling, graphic design for specific products, design of specific art work software, design of specific devices, eg the aerospace industry

- **Product development was an important area:** catering equipment, specific types of sport wear using innovative materials, aerospace devices, specific devices for the telecom industry, specific electronic devices
- **The type of marketing support** needed by the majority of firms was website design and development and updating websites
- A number of firms were concerned with the **identification and development of new markets**
- **Promotion and branding of businesses was an important** area for more than a quarter of businesses. Corporate identity was mentioned a number of times and corporate brochures and catalogues
- A small minority of businesses indicated that the support would include significant innovation but this varied considerably
- A small minority of businesses felt that the support would include significant technology advice, audio customizing technology and technologies of mechanical structural technologies were mentioned
- The businesses thought that the design adviser they sought would be preferred is they had a specific knowledge of the sector but this was not absolutely necessary
- **Most businesses thought a design adviser with experience of SMEs was important**
- There was a wide spectrum of specific design skills that the design consultants should have in order to meet the needs identified
- **A quarter of respondents indicated that they would not expect to pay for the advice.** Those who would pay indicated that they would be willing to pay a day rate of less than £250 or a total fee (for cumulative days and/or a specific design task) of less than £1000

1 Introduction and Methodology

1.1 Introduction

1.1.1 In February 2008, *emda* commissioned Public & Corporate Economic Consultants (PACEC) to develop a programme of support for integrating design into SMEs, including an analysis of design needs and the identification of additional/intensive support interventions required by businesses. This report outlines the findings of PACEC's survey research with businesses in the East Midlands and the follow-up discussions with a selection of businesses on the support they may require in the near future.

1.1.2 The survey of business needs forms the demand side research on support and one of a number of integrated tasks within the evaluation of design for business project. The other tasks cover the provision of design services in the East Midlands through a review of the Business Link brokerage system which includes providers, consultations with providers, and discussions with Business Link advisers. There will also be an assessment of the gaps in the provision of design support services and the development of options, and the support required, to fill the gaps, with *emda*.

1.2 Methodology

1.2.1 The information from businesses has been obtained via a structured interview with 900 businesses in the East Midlands to establish information on current use of design and design support, followed by additional qualitative follow-up interviews with certain of those businesses which indicated that they may require design advice in future.

1.2.2 The sample of businesses was drawn up so as to be representative of the population of small and medium-sized enterprises (or SMEs – companies with under 250 employees) in the East Midlands, by county and by industrial sector. However, the sampling frame contains more companies in larger employment sizebands than is strictly representative. This is because the great majority of companies are micro-businesses, whereas only 1 in 100 SMEs has over 100 employees. A strictly representative sample would not contain enough of these larger companies to be able to draw meaningful comparisons between sizebands. Since our previous research, especially with the Design Council (and three annual tracking surveys), indicates that company size is a major indicator of attitudes towards design, and a major objective of the survey is to compare larger companies with smaller, we have over-sampled in the larger sizebands, and weighted the survey sample so that the overall total is representative of the East Midlands as a whole.

1.2.3 The original proposal was for 800 total interviews, with 100 drawn from companies with 100-249 employees, 150 from each of the 11-24 and 25-99 employee size bands, and the remaining 400 from companies with 10 employees or fewer. The survey was subsequently extended to 900 companies and the quotas were increased on a *pro rata* basis.

1.2.4 The sample breakdowns by county, size, and sector are tabulated below.

Table 1.1 Sample breakdown by size and sector

Sectors	Number of employees per business				
	1 - 10	11 - 24	25 - 99	100 - 249	TOTAL
ABCE: Agriculture, fishing, forestry, extraction	3%	0%	0%	0%	3%
D: Manufacture	8%	4%	5%	4%	20%
F: Construction	6%	2%	1%	1%	10%
G: Wholesale and retail	12%	5%	5%	3%	26%
H: Leisure	5%	2%	2%	0%	10%
I: Transport, storage, and communications	2%	1%	2%	1%	6%
JK: Finance and business services	7%	3%	3%	2%	16%
O: Personal services	6%	1%	1%	1%	9%
<i>Total</i>	<i>50%</i>	<i>18%</i>	<i>19%</i>	<i>12%</i>	<i>100%</i>

Source: Experian National Business Database, PACEC

Table 1.2 Sample breakdown by size and county

Sectors	Number of employees per business				
	1 - 10	11 - 24	25 - 99	100 - 249	TOTAL
Nottinghamshire	12%	4%	5%	3%	23%
Lincolnshire	10%	3%	3%	2%	18%
Derbyshire	11%	4%	4%	3%	22%
Northamptonshire	7%	3%	3%	2%	15%
Leicestershire	10%	4%	4%	3%	22%
<i>Total</i>	<i>50%</i>	<i>18%</i>	<i>19%</i>	<i>12%</i>	<i>100%</i>

Source: Experian National Business Database, PACEC

1.2.5 The information on company size, sector, and location was obtained from Experian Ltd's National Business Database, as were the business contact details themselves.

1.2.6 The following chapters present the results of the survey of businesses, and the follow-up discussions with those that required design support. The tables of results are cross-tabulated by the size of company as the data shows the greatest variation by size. Further cross-tabulations by sector and county (as agreed with *emda*) are included as appendices to the report, and are referred to in the explanatory text. Results for a particular sub-group which are significantly different to the population as a whole (statistically speaking, at the 95% confidence level) are highlighted in **bold text**.

2 Background and Characteristics of Businesses

- 2.1.1 87% of the respondents are independent businesses, with most of the remainder (12%) being subsidiaries or branches of a UK business, and 2% being subsidiaries or branches of an overseas business. Companies with over 10 employees are significantly more likely to be branches/subsidiaries.

Table 2.1 What is the status of your business? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
An independent business	87	91	66	57	56
A subsidiary or branch of another UK business	12	9	27	33	38
A subsidiary or branch of an overseas business	2	0	7	11	7

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q6)

- 2.1.2 Firms in the production and processing sectors such as agriculture, extraction, manufacture, and construction were more likely to be independent. Firms in service sectors such as retail, hotels, restaurants, and personal services were more likely to be branches. Businesses in Nottinghamshire were also more likely to be branches (18% of the total) and less likely to be independent (80%).

- 2.1.3 More than half (58%) of companies had been trading for more than 10 years. The larger the company, the more likely it was to have been trading for more than 10 years. 12% of companies had been trading for less than 3 years, and these were most likely to be companies with 1-10 employees. Firms in primary sectors (agriculture, extraction, forestry, fishing) were much more likely to have been trading for more than 10 years (85% of these had). Firms from Nottinghamshire were more likely to have been trading for less than 3 years (18%) and less likely to have been trading for more than 10 (49%), while firms from Lincolnshire were more likely to have been trading for more than 10 years (68%).

Table 2.2 For how many years has your business been trading? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Less than 3	12	13	8	2	2
4-5	14	15	6	6	7
6-10	16	16	15	7	4
More than 10	58	55	71	84	87

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q7)

2.1.4 Half (49%) of the businesses had a turnover up to £100,000 pa. 5% had a turnover of more than £10 million. Respondents from primary sectors and construction were the most likely to have turnovers less than £100K (77-78%).

2.1.5 45% of the businesses had grown moderately over the past 3 years, and 40% had stayed the same size. While 6% had grown rapidly, 8% had grown smaller. However, 26% of respondents from primary sectors had grown smaller over the past 3 years. Financial and business service firms were the most likely to have grown.

Table 2.3 How has your turnover changed over the past three years? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Not trading	1	2	1	0	0
Grown smaller	8	8	8	6	2
Stayed same size	40	43	22	19	16
Grown moderately	45	43	57	59	71
Grown rapidly	6	4	13	16	11

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q10)

2.1.6 57% of businesses were aiming to grow moderately, and 34% to stay the same size. 4% aimed to grow rapidly, while 5% aimed to become smaller. Growth ambitions were significantly more common in firms of 11 employees and above, and in firms in financial and business service sectors. Firms from Derbyshire were more likely to wish to stay the same size (43%) and less likely to wish to grow rapidly (47%).

Table 2.4 How would you describe the overall growth objectives of your business? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Become smaller	5	5	3	1	0
Stay same size	34	37	14	14	13
Grow moderately	57	54	72	74	76
Grow rapidly	4	3	11	12	12

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q11)

2.1.7 51% of respondents said that their business was owned by a person from one of the following social groups: black or minority ethnic (BME) groups, women, people under 30 years of age, or disabled people. Among this 51%, the breakdown was 24% BME ownership, 45% women, 21% people under 30 years of age, and 6% disabled people. Therefore, as a fraction of all businesses, the breakdown is 12% BME ownership, 23% women, 11% people under 30 years of age, and 3% disabled people.

Table 2.5 Can I ask you a question about whether your business is owned by a person / people from particular social groups, eg BMEs or women (note ownership is more than half of the equity / shares)? This question is optional. (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	51	52	46	39	41
No	43	44	39	39	43
Don't know	6	4	15	22	16

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12A)

Table 2.6 If yes, is your business owned by a person / any people from the following groups? (Please tick as appropriate) A black and minority ethnic group(BME):

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	24	23	27	35	50
No	74	76	70	57	43
Not Sure	1	1	4	8	7

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B1)

Table 2.7 Women:

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	45	46	46	32	50
No	54	54	52	58	45
Not Sure	1	0	2	10	5

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B2)

Table 2.8 People under 30 years of age:

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	21	19	28	29	47
No	78	80	69	61	48
Not Sure	1	1	4	10	5

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B3)

Table 2.9 Disabled people:

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	6	5	13	14	45
No	92	94	84	76	50
Not Sure	2	2	4	10	5

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B4)

3 The Definition and Importance of Design

3.1.1 No single definition of design was agreed upon by more than half of the respondents. The most common replies were: “Design is about marketing/advertising (including websites)” (41%); “Design is about promoting/branding the company” (38%); “Design is about products/services looking attractive” (37%); and “Design is about working well to meet client needs” (35%). Comparatively few respondents (23%) said that design was used to develop products and services.

**Table 3.1 How would you define design as it relates to your business?
Please tick definitions below**

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Design is used to develop products and services	23	21	28	40	47
Design is about working well to meet client needs	35	34	44	44	58
Design is about products / services looking attractive	37	37	34	51	45
Design is about marketing/advertising(including websites)	41	40	36	60	46
Design is about promoting / branding the company	38	36	46	62	51
Design is about packaging for products / services	17	15	19	35	30
Design is about improving production processes	8	6	13	24	27
Design is a strategic business tool	9	7	12	23	23
Not sure	21	23	13	15	12

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)

Source: PACEC Survey (Q13B)

3.1.2 26% of respondents said that design had a significant role to play in their business, and 17% that it was integral to the firm’s operation. Companies of over 24 employees were significantly more likely to say that design was integral, and significantly less likely to say that it had a limited role to play. Companies of over 10 employees were significantly more likely to say that design had a significant role to play, and less likely to say that it had no role to play at all. The industrial sectors most likely to contain firms to which design is integral were manufacturing firms (26%) and financial/business service firms (25%). 59% of primary sector firms did not think design had any role to play at all.

Table 3.2 Which of the following that I read out most closely represents the role design plays in your business? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
It is integral to the firm's operation	17	15	20	33	32
It has a limited role to play	34	35	34	21	23
It has a significant role to play	26	24	33	35	35
It has no role to play at all	23	25	12	11	10

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q14)

4 Barriers to Design

4.1.1 The most common barriers to businesses using design and innovation were cost, or finance in general (13%), lack of time (9%), and lack of skills (8%). 21% of respondents said that design was not relevant to their work, and 37% that there were no barriers. Larger companies were more likely to say that there were no barriers to design, with 60% of companies with 100-249 employees reporting that there were no barriers. Most of the problems identified were more common in smaller businesses than larger; for example, costs were a problem for 14% of businesses with 1-10 employees but only 6% of businesses with 100-249 employees. However, standardised production practices are an exception; these are a barrier to design for 6% of companies with over 25 employees but only 2% of companies with under 11 employees. Companies from Leicestershire were the most likely to think that costs, lack of time, and lack of skills were barriers to design.

Table 4.1 What are the perceived / real barriers to your businesses using design and innovation more in its work? (Please tick all that apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Nothing	37	35	48	50	60
Not relevant to our work / business	21	22	14	11	18
Costs / finance generally	13	14	9	11	6
Don't know	13	13	13	14	10
Lack of time	9	10	7	4	1
Lack of skills	8	9	5	4	2
High cost / low return	5	5	6	4	1
Now clear / tangible rewards	4	4	5	4	5
Conservatism / traditionalism / reluctance to change	3	3	1	2	1
Standardised production practices	2	2	4	6	6
Lack of information about support for design	2	2	1	0	0
Difficult to find external design expertise or advice	2	2	4	1	2
Previous mistakes / failures	1	1	1	1	0
Organisational culture	1	1	0	1	1
Risks involved	0	0	0	1	1
Lack of understanding of intellectual property/patenting	0	0	0	0	0
Other	5	5	3	6	7

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q15A)

5 Design Practices

- 5.1.1 While 43% of respondents reported no design activity, 17% employ an external design consultant when needed, 17% have their own internal designers but not a dedicated team or department, and 12% have a dedicated design team/department. Firms of 11 employees or more were significantly more likely to have their own design department and less likely to report no design activity. Manufacturers and finance/business service firms were most likely to employ internal designers. Firms from Leicestershire were the most likely to employ internal designers (24%), and firms from Lincolnshire the least likely (7%). Firms from Derbyshire were the most likely not to employ any design activity (59%).

Table 5.1 Which of the following applies to your business? (Read out and tick all that apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Have a dedicated design team / department	12	8	31	37	43
own internal designer(s), no dedicated team / dept	17	16	16	19	20
Employ an external design consultant(s) when needed	17	16	15	22	17
Other approaches to design	19	18	26	30	21
No design activity	43	47	31	17	22

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q16A)

- 5.1.2 19% of companies stated that they had a different approach to design. Among small companies, 12% reported that design was undertaken free of charge by either a member of staff or their client. Larger businesses were more likely to say that design was undertaken by their head office.

Table 5.2 Other approaches to design:

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Design done free of charge by client/member of staff	11	12	7	6	7
All design is done by Head office staff	5	3	17	18	10
Promotional Literature is provided by our suppliers	2	2	2	0	1
Supplement internal designers with outside specialists	0	0	0	1	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q16B)

- 5.1.3 31% of respondents had developed or introduced new products, services, or processes in the last 3 years. Firms of 11 employees or more were significantly more likely to have done so, with 58% of companies with 25 or more employees reporting this. Manufacturers (47%) and finance/business service firms (43%) were the most likely to have developed new products or services, and primary (11%) and wholesale/transport firms (12%) the least likely. Firms from Leicestershire were more likely to have introduced new products, services or processes (40%) than the East Midlands as a whole.

Table 5.3 Has your business developed or introduced any new products / services or processes in the last 3 years? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	31	28	46	58	58
No	66	70	50	37	36
Don't know	2	2	5	5	6

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q17)

- 5.1.4 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 36,300 businesses have developed or introduced new products, services, or processes in the last 3 years, as shown in Table 5.4 below.

Table 5.4 Has your business developed or introduced any new products / services or processes in the last 3 years? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	36,300	27,600	4,300	3,700	700
No	76,800	69,300	4,700	2,400	400
Don't know	2,900	2,100	500	300	100

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q17)

- 5.1.5 11% of respondents had developed or introduced new products, services, or processes **involving major innovation or design** in the last 3 years. Firms of 25 employees or more were over three times as likely to have done so as companies with 10 employees or fewer (28-30% vs 9%). Finance and business service firms were the most likely industrial sector to have innovated (22%).

Table 5.5 Has your business developed or introduced any new products / services or processes involving major innovation / design in the last 3 years? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	11	9	15	30	28
No	85	87	78	59	64
Don't know	4	4	7	11	9

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q18)

5.1.6 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 12,600 businesses have developed or introduced new products, services, or processes **involving major innovation or design** in the last 3 years, as shown in Table 5.6 below.

Table 5.6 Has your business developed or introduced any new products / services or processes involving major innovation / design in the last 3 years? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	12,600	9,000	1,400	1,900	300
No	97,900	86,000	7,400	3,800	700
Don't know	5,100	3,700	700	700	100

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q18)

5.1.7 22% of firms have used external design advice in the last 3 years, with those employing 1-10 employees marginally less likely to have done so (21%). Finance and business service firms were the most likely to have done so (31%) and primary firms the least likely (7%).

Table 5.7 Has your business used any external design advice from outside the company in the last 3 years? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	22	21	30	31	24
No	70	73	53	45	54
Don't know	8	6	17	24	22

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19A)

5.1.8 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 26,000 businesses have used external design advice in the last 3 years, as shown in Table 5.8 below.

Table 5.8 Has your business used any external design advice from outside the company in the last 3 years? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	26,000	20,800	2,900	2,000	300
No	80,900	72,300	5,100	2,900	600
Don't know	9,300	5,800	1,700	1,500	200

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19A)

5.1.9 Among the companies which had used external design advice in the last 3 years, the most common sources were other firms (34%), private design consultants (25%), and friends/colleagues (19%). Larger firms (45%) and construction firms (47%) were the most likely to have used private consultants.

Table 5.9 If yes, what sources of design advice have you used ? (Please tick all that apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Other firms	34	34	37	33	27
Private design consultant	25	24	23	38	45
Friends / colleagues	19	22	10	8	12
Internet / website	11	11	14	8	14
Business Link	9	9	15	2	0
Trade / Business Association	4	4	4	2	11
Chamber of Commerce	4	4	10	0	7
East Midlands Development Agency	2	1	11	3	3
Universities	1	0	4	6	8
Design Council	1	1	0	2	0
Email bulletins	1	1	2	0	0
Incubation / innovation centre	0	0	2	0	0
FE college	0	0	0	0	0
DTI (now BERR / DIUS)	0	0	0	0	0
A formal course / classes	0	0	3	0	0
An online course	0	0	2	0	0
Other	13	13	16	13	23
None	1	1	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19B)

5.1.10 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that the most popular source of design advice (other

firms) was used by 8,800 firms. The full breakdown of results (omitting those used by fewer than 1,000 firms) is shown below in Table 5.10

Table 5.10 If yes, what sources of design advice have you used ? (Please tick all that apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Other firms	8,800	7,000	1,000	600	100
Private design consultant	6,500	5,000	600	700	100
Friends / colleagues	5,000	4,500	300	100	0
Internet / website	2,800	2,200	400	200	0
Business Link	2,300	1,800	400	0	0
Chamber of Commerce	1,100	800	300	0	0
Trade / Business Association	1,000	800	100	0	0
Other	3,400	2,700	400	200	100

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19B)

5.1.11 In addition to being asked all sources of design advice they had used, the respondents were also asked which the single main source of advice had been. The results are very similar to the list of all sources, which suggests that there is little overlap between sources. The most common source of design advice was other firms (30%), followed by a private design consultant (24%), and friends/colleagues (16%). Among construction firms, the main source was a consultant (55%).

Table 5.11 Please identify the main source of design advice)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Other firms	30	30	34	33	25
Private design consultant	24	24	18	37	39
Friends / colleagues	16	18	8	10	8
Internet / website	8	9	5	2	8
Business Link	6	7	4	0	0
Trade / Business Association	2	1	4	0	8
East Midlands Development Agency	2	1	7	3	0
Chamber of Commerce	1	0	10	0	0
Universities	1	0	2	4	4
Other	10	10	7	11	8
None	1	1	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19D)

- 5.1.12 Again concentrating on the firms who had used external design advice in the last 3 years, the most common design issues were marketing or advertising, including websites (53%), promotion and branding (28%), product development (26%), and service development (17%). In retail, hotels, restaurants and personal service companies the most likely issues were marketing and advertising (77%) and promotion/branding (44%); the least likely was product development (11%).

Table 5.12 For which sort of issues have you used external design advice? (Please prompt and tick as many as apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Marketing/advertising products/services(including websites)	53	58	21	46	51
Promotion / branding the company	28	28	28	25	38
Product development	26	24	32	43	25
Development of services	17	17	20	14	28
Production processes / delivery	7	5	17	10	4
Packaging for products / services	4	2	16	11	8
Developing design as a strategic business tool	4	4	4	10	8
Don't know	2	2	0	0	0
Other	6	6	10	6	4

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19V)

- 5.1.13 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that the most common issue requiring design advice (marketing/advertising) was used by 12,300 firms. The full breakdown of results is shown in Table 5.13 below.

Table 5.13 For which sort of issues have you used external design advice? (Please prompt and tick as many as apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Marketing/advertising products/services(including websites)	12,300	10,800	600	800	100
Promotion / branding the company	6,500	5,200	700	500	100
Product development	6,000	4,400	800	800	100
Development of services	4,000	3,100	500	300	100
Production processes / delivery	1,600	1,000	400	200	0
Packaging for products / services	1,000	400	400	200	0
Developing design as a strategic business tool	1,000	700	100	200	0
Don't know	400	400	0	0	0
Other	1,500	1,100	200	100	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19V)

- 5.1.14 Only 3% of those firms which had not used external design advice had sought it but not proceeded to use it. Of these (bearing in mind that the total number of responses is small), 60% said it was too expensive, 20% questioned the return on investment, and 16% felt it was not accessible enough.

Table 5.14 If no, did you seek to use external design advice but did not proceed to use it? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	3	3	1	2	0
No	93	94	91	83	72
Don't know	4	3	8	15	28

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q20A)

6 Design Support Needs

- 6.1.1 37% of businesses thought that design would become more important over the next 3 years in enabling the company to enhance or maintain a competitive position. This was a viewpoint significantly more commonly held by firms of 25 employees or more (54-57% vs 35%). Manufacturers (49%) were also more common than average to think this; wholesale and transport firms (26%) and primary sector establishments (7%) less so.

Table 6.1 Do you think design will become more important over the next 3 years in enabling the company to enhance / maintain a competitive position? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	37	35	42	54	57
No	41	42	34	28	22
Don't know	23	23	24	18	22

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q21)

- 6.1.2 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 42,900 businesses think that design will become more important over the next 3 years in enabling the company to enhance or maintain a competitive position. These results are shown in full in Table 6.2 below.

Table 6.2 Do you think design will become more important over the next 3 years in enabling the company to enhance / maintain a competitive position? (Please tick one)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	42,900	34,800	4,000	3,500	600
No	47,200	41,900	3,300	1,800	200
Don't know	26,200	22,500	2,300	1,200	200

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q21)

- 6.1.3 30% of businesses are likely to be developing existing or new **products or services** in the next 3 years, including more than half of businesses with 25 employees or more, 48% of manufacturers, and 42% of finance and business service firms. However, only 15% of respondents from wholesale and transport firms and 7% of firms in primary sectors thought that they were likely to.

Table 6.3 Are you likely to be developing any existing / new products / services in the next 3 years? (Please tick)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
No	59	63	44	26	26
Yes	30	28	39	53	52
Not Sure	11	10	17	21	22

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q22A1)

6.1.4 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 35,200 businesses plan to develop products or services in the next 3 years, as shown in Table 6.4 below.

Table 6.4 Are you likely to be developing any existing / new products / services in the next 3 years? (Please tick)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
No	68,100	61,900	4,200	1,700	300
Yes	35,200	27,600	3,700	3,300	600
Not Sure	12,600	9,400	1,600	1,300	200

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q22A1)

6.1.5 13% of businesses are likely to be developing existing or new **processes** in the next 3 years, including a third of businesses with 25 employees or more, 27% of finance and business service firms, and 22% of manufacturers, but only 7% of retail, hotel, restaurant, and personal service organisations and none of the respondents from the primary sector.

Table 6.5 Are you likely to be developing any existing / new processes in the next 3 years? (Please tick)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	13	11	12	34	32
No	73	77	61	39	37
Not Sure	14	12	26	27	31

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q22A2)

- 6.1.6 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 14,000 businesses are likely to be developing processes in the next 3 years, as shown in Table 6.6 below.

Table 6.6 Are you likely to be developing any existing / new processes in the next 3 years? (Please tick)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Yes	14,000	10,500	1,100	2,000	300
No	81,700	73,400	5,600	2,300	400
Not Sure	15,800	11,500	2,400	1,600	300

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q22A2)

- 6.1.7 63% of companies (52% of those with 25 employees or more) thought that they would probably not require design advice over the next 3 years. 10% thought that they possibly would, 7% that they probably would, and 6% that they definitely would, with the remaining 14% unsure. There were few significant differences by sector, but manufacturers were more likely to think that they probably would (16%), retailers and other consumer services less likely to think that they probably would (3%), and primary sector firms more likely to think that they probably would not (86%).

Table 6.7 Do you think you may require design advice in the next 3 years? (Please probe and tick)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Definitely	6	6	5	10	6
Probably	7	6	11	8	9
Possibly	10	10	9	14	17
Not sure	14	14	14	16	16
Probably not	63	64	62	52	52

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23A)

- 6.1.8 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 7,400 businesses believe that they will definitely require design advice in the next 3 years. A further 7,700 believe that they probably will, and another 11,500 possibly will. The breakdown of results by size of firm is shown in Table 6.8 below.

Table 6.8 Do you think you may require design advice in the next 3 years? (Please probe and tick)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Definitely	7,400	6,200	400	600	100
Probably	7,700	6,000	1,100	500	100
Possibly	11,500	9,700	800	900	200
Not sure	15,900	13,400	1,300	1,000	200
Probably not	73,300	63,500	5,900	3,300	600

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23A)

- 6.1.9 Among the 23% who definitely, probably, or possibly would require design advice, the most common requirements for advice were on marketing and advertising (60%), promotion and branding (44%), product development (26%), and service development (17%).

Table 6.9 If definitely / probably / possibly, what would the support be for? (Read out and tick as many as apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Marketing/advertising products/services(including websites)	60	65	34	37	39
Promotion / branding the company	44	46	38	31	25
Product development	26	22	43	42	37
Development of services	17	16	27	16	44
Production processes / delivery	8	7	17	14	9
Packaging for products / services	7	5	10	19	17
Developing design as a strategic business tool	7	7	5	10	3
Don't know	1	1	0	4	3
Other	6	7	5	2	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23B)

- 6.1.10 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that 16,100 businesses will definitely, probably, or possibly require design advice in marketing/advertising. 12,000 will definitely, probably, or possibly require support in promotion or branding. These and other estimates of demand are shown below in Table 6.10 below.

**Table 6.10 If definitely / probably / possibly, what would the support be for?
(Read out and tick as many as apply)**

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Marketing/advertising products/services(including websites)	16,100	14,500	800	700	100
Promotion / branding the company	12,000	10,400	900	600	100
Product development	6,900	5,000	1,000	800	100
Development of services	4,600	3,600	600	300	100
Production processes / delivery	2,200	1,600	400	300	0
Developing design as a strategic business tool	1,900	1,600	100	200	0
Packaging for products / services	1,800	1,100	200	400	100
Don't know	300	200	0	100	0
Other	1,700	1,600	100	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23B)

6.1.11 Again among the 23% who definitely, probably, or possibly would require design advice:

- 25% said the support would include significant innovation
- 32% advanced or new technologies
- 25% advanced or new materials

The full table is not shown as there were insufficient survey responses among larger firms to draw meaningful conclusions.

6.1.12 Among the 23% who definitely, probably, or possibly would require design advice:

- 63% required better information on the design support available
- 48% one to one sought advice, and 36% workshops with businesses facing similar issues
- One to one advice was typically envisaged as initial or light touch (by 81%), to be delivered at the business premises, by a general design consultant
- 19% sought in-depth support
- 89% required 1 to 2 days of one to one support and 11% required more than 2 days

Table 6.11 If definitely / probably / possible, how should design advice be delivered for you?

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Better information on the design support available	63	65	62	50	27
One to one advice	48	48	54	47	23
Workshops with businesses facing similar issues	36	40	24	4	11
Networking events	30	31	31	19	31
An assessment to determine your design needs	27	27	20	26	38
An introduction to design advisers	26	26	16	36	26

Respondents could select more than one option; so percentages in any column may sum to more than 100.
A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23F)

Table 6.12 Main delivery method required

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Better information on the design support available	49	51	46	38	13
One to one advice	21	19	41	25	22
An introduction to design advisers	11	10	2	26	14
An assessment to determine your design needs	7	7	3	9	23
Workshops with businesses facing similar issues	6	7	0	0	5
Networking events	6	5	8	2	23

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23G)

Table 6.13 if one to one advice (please tick once per row) -Number of days?

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
1	62	63	59	44	47
2	27	27	26	33	13
3-5	8	8	8	9	26
6-10	2	2	4	10	14
11+	0	0	2	4	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23N)

Table 6.14 Depth?

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Initial / light touch	81	84	64	66	86
In depth	19	16	36	34	14

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23O1)

Table 6.15 Where?

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
At the Business premises	81	78	94	93	100
Elsewhere / Other site	19	22	6	7	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23O2)

Table 6.16 Type?

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
General Design Consultant	75	80	55	49	27
Specialist Design Consultant	25	20	45	51	73

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23O3)

Table 6.17 If specialist design consultants (please tick as many as apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Your sector	42	39	41	77	55
Products / services	40	39	40	54	30
Technologies	32	35	18	45	0
Processes	15	12	19	33	14
Other	18	18	22	0	14

Respondents could select more than one option; so percentages in any column may sum to more than 100.
A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23P)

Table 6.18 Other specialist design consultants

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Interior design	5	7	n/a	n/a	n/a
Website design	3	3	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23Q)

6.1.13 By grossing-up these survey results to the known population of businesses in the East Midlands, we estimate that the potential market for information on design support is 16,100 firms, and that that for one-to-one advice is 12,200 firms. The full set of results is shown in Table 6.19 below.

Table 6.19 If definitely / probably / possible, how should design advice be delivered for you?

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Better information on the design support available	16,100	13,700	1,500	800	100
One to one advice	12,200	10,100	1,300	800	100
Workshops with businesses facing similar issues	9,200	8,500	600	100	0
Networking events	7,700	6,600	700	300	100
An assessment to determine your design needs	6,800	5,800	500	400	100
An introduction to design advisers	6,600	5,500	400	600	100

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23F)

6.1.14 The best ways to inform businesses about the design advice available were reported to be mailshots (30% of respondents), e-mail (22%), telephone contact (18%), and face-to-face discussions with an advisor (9%). There were many differences between sectors, with primary sectors keener than average on trade journals (28%), financial and business service companies approving of mailshots (39%), and manufacturers in favour of email (37%).

Table 6.20 What is the best way to inform you about the design advice available? (Please prompt and tick all those that apply)

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Mailshots	30	32	20	25	16
Email	22	22	22	30	22
Telephone contact	18	18	18	14	18
Discussions with an adviser- telephone	14	14	12	9	6
Websites	10	10	10	16	20
Trade journals	10	9	13	12	11
Discussions with an adviser-face-to-face	9	9	8	4	5
Press	4	4	2	2	4
Radio / TV	3	3	1	3	4
Events	2	2	3	1	6
Other	35	33	48	37	46

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q24A)

Table 6.21 Other ways of informing about the availability of design advice

	Percentage of all respondents (by size of business)				
	Total	1-10	11-24	25-99	100-249
Not needed/relevant	25	26	25	16	28
Through Head office	5	3	21	21	16
Through Chamber of Commerce	1	1	0	0	1
Leaflets/flyers	0	0	0	0	0
Specialist/niche service not available	0	0	1	1	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q24B)

7 Follow up interviews with Businesses

- 7.1.1 The purpose of this part of the research was to discuss with businesses in more details their design needs, the type of design support and delivery that they may require and the barriers to design that they face.
- 7.1.2 The sample was drawn from those businesses that thought they would definitely or probably require design support and expressed a need for particular design support in the survey of businesses (eg. Specific design skills, specific products or services or more general design needs).
- 7.1.3 The businesses that we contacted were given two options:
- To participate to a focus group at a later date to be agreed.
 - To take part in a follow up interview now or at a more convenient time.
- 7.1.4 Only 3 businesses preferred the option of a focus group while 40 agreed to take part in a follow up interview. The main reasons for not opting for the focus group were the opportunity costs (or committing half a day), time and other priorities. Of those that required a focus group they were more interested in obtaining support rather than discussing their design needs. We therefore proceeded with the follow-up interview method.
- 7.1.5 Forty firms were interviewed using a semi-structured questionnaire with open ended questions to allow respondents to enlarge upon some of the issues and produce some more qualitative information.
- 7.1.6 While businesses were able to discuss their design needs in greater detail than in the survey they were generally of the view that full requirements could not be drawn out unless there was an active discussion with a design adviser and an exchange of views.

7.2 Barriers to Design

- 7.2.1 A number of barriers to design were identified in the survey of businesses. We asked respondents to elaborate on their original answers.
- 7.2.2 Those respondents who indicated that lack of skills was a barrier to design were asked which particular type of skills they referred to.. A large variety of skills were mentioned. Not surprisingly design skills, namely website design, graphic design, electronic design, design for high tech devices were on top of the list. Specific design related IT skills were also an issue in some cases. One urban designer stressed that he would benefit strongly from some training in a specific software called "Studio Max". This software gives 3D modelling of virtual buildings and streets scenes from turning angles and corners. Business development, sales and marketing skills were also mentioned, a number of firms felt that they needed to penetrate new markets. One firm which develops devices for the telecom industry indicated that the English market was saturated and therefore needs a global medium to advertise particularly

in India and Africa. Another respondent stressed: “we don’t know how and where to look for new clients”. The lack of Regulatory knowledge for specific types of design was also seen as an issue. General business and financial skills were also mentioned, for example, working out the cost of design or being able to diversify. Lack of creativity was also seen as a barrier to design. A respondent, from an engineering company, commented: “We need designers who can start from a blank piece of paper”. In two occasions respondents stressed that it was the combination of specific skills that was difficult to find in the market. For example, one firm indicated that they had difficulty recruiting staff combining skills in acoustic engineering and mechanical structural engineering. Another respondent pointed out that because staff were moving towards other sectors, it was hard to find electronic design skills combined with production engineering skills.

- 7.2.3 The majority of those who indicated that cost or finance was a barrier to design specified that the need for grants was of paramount importance. Grants were needed because firms could not afford the cost of bank loans and overdraft or simply could not access them. Grants were essential for them to design and develop new products and services. One respondent unable to pursue a loan indicated that a grant was essential for the company to develop a new piece of sportswear using a new type of yarn from Italy. Knitting experts were required to combine the yarn so that the garment would not sweat. A development grant would help with the costs involved. A couple of interviewee pointed out that they needed grants to “finish off” the development of new devices which has come to a stand still. Another respondent indicated that his firm has not got the resources to develop a website and therefore needed a grant. The cost of external support for design and external designers were mentioned as a barrier to design by the majority of respondents. The fact that companies had to re direct their finances towards other rising costs (eg, cost of supplies, utilities, materials) meant that less cash was available for design.
- 7.2.4 The majority of those who indicated that lack of time was a barrier to design felt that it was mainly the lack of time to look for support and information about design and designers that was an issue. They lacked resources to dedicate to this and concentrated on other issues such as staff recruitment and training and business development.
- 7.2.5 Firms found it difficult to find external design expertise in a number of areas namely 3D modelling, graphic design for specific products, design of specific art work software, design of specific devices for the aerospace industry, High tech design. One respondent said that it was hart to find external expertise of knowledge of regulations to design High Tech / R&D products in the aerospace industry for specific devices. Another mentioned that it was difficult to find and expert in graphic design particularly 3D modelling in the construction industry. The other point that was emphasised was that it was very difficult to find “genuine” professional website designers “at a reasonable rate”. Two respondents said that it was difficult for them to find external expertise because of its high cost.

- 7.2.6 The lack of information about support for design was perceived as a barrier for less than a quarter of firms as they explained that they did not know where to go if they wanted to find out about designers, their credentials, and the cost of design. They did not know where to go for grants. These firms mainly did not know where to go for information about support for design. “We don’t know who offers what” was a typical answer. In a few cases there was also the complete lack of knowledge that there was actually any support available to them.
- 7.2.7 The perceived risk associated with design and regarded as a barrier to design by a minority of firms was mainly mirrored by fear. The fear of designing a new product that may not sell, or the fear of investing in design and not getting a good return were common issues raised by respondents.
- 7.2.8 One respondent who felt that traditionalism / conservatism acted as a barrier to design explained that new designs are not always purchased by their retailers because of fear and the risk factor in the supply chain in the fashion industry.
- 7.2.9 Another barrier to design which was raised by one interviewee was the impossibility to find appropriate training of apprentices for customizing cars. This respondent explains that he was “bombarded” with demands from applicants who wanted to become apprentices in that field but he has not got the time to train them. He said that there should be a training establishment in a College “like the Snake-pit in America” for modifying cars, customizing body and audio work. He stresses that it would attract a lot of potential apprentices in the region. Another barrier was felt to be the current economic climate, forthcoming recession and reservations to invest at present.

7.3 Specific Design Support Needs

- 7.3.1 Half of the businesses indicated that they would definitely require business advice in the next 3 years, while the other half felt that they probably would. There were a number of areas in which businesses felt that they needed design support
- 7.3.2 Product development was an important area for a number of businesses and needs for design support were expressed. We asked businesses which identified a need for design support for product development to elaborate on their answers. The type of product where design support was needed varied from catering equipment to specific type of sport wear using innovative materials, aerospace devices, specific devices for the telecom industry, specific electronic devices. One firm, in the textile industry, explained that it needed to develop a new work wear to fit the market and survive against Chinese export. Design in this instance was crucial to the firm and a strategic tool. One respondent needed design support to develop new advertising material. One business in the construction and civil engineering industry mentioned a 3D modelling software to show buildings before being built to generate virtual buildings.
- 7.3.3 The type of marketing support needed by the majority of firms was website design and development, updating websites. One sole trader working in property

maintenance specified that he desperately needed support to design a website with pictures of buildings and examples of work he has undertaken. A number of firms were concerned with the identification and development of new markets. One respondent felt that his firm needed to devise a new marketing tool in order to fight Chinese imports. Another needed to find a Global medium to penetrate markets which they have already identified. This firm explained that they already had a website and needed something else. In one instance the interviewee mentioned that he would require assistance in radio / audio advertising. More than a quarter of businesses felt that they support in marketing but could not specified exactly where. Typical answers were: "Marketing in general" and "All aspects of marketing".

7.3.4 Promotion and branding of the firm also appeared to be an important area for more than a quarter of businesses. Corporate identity was mentioned a number of times. Design support would be used to raise the firm's profile or to help with designing corporate brochures and catalogues. One sole trader explained that he needed help with designing a logo to put on his vehicle and on tee-shirts.

7.3.5 Packaging for product was an area where respondents were more vague about their needs. The majority needed ideas for new type of packaging. One respondent in agriculture needed ideas to design "new packaging for the eggs".. A manufacturer of clothing needed ideas to design new packaging for special occasion women's wear.

7.3.6 A small minority of businesses indicated that the support would include significant innovation. Developing a sweat free garment using advanced yarn was seen as significant innovation in one case. One respondent mentioned an improved method in the casting of aluminium. For another firm, significant innovation was the process of transposing one specific set of figure onto a computer. It has to be noted that a number of firms decline to comment further on this issue due to confidentiality.

7.3.7 A small minority of businesses felt that the support would include significant technology, audio customizing technology and technologies of mechanical structural technologies were mentioned. One firm also mentioned noise control technology in power generation industries. Two respondents mentioned 3D modelling and virtual technologies. The other respondents were unable to comment further.

7.4 Experience / Skills of Design Consultants to Meet Needs

7.4.1 The businesses that we interviewed belong to a wide variety of sectors and thought that the design adviser they sought would be preferred if they had a specific knowledge of the sector but this was not absolutely necessary, as long they were "good" design advisers. There sectors were:

- The manufacturing sector: Manufacturing of clothing and textile, manufacturing of machinery, food manufacturing, manufacturing of plastics.
- Agriculture
- Hospitality

- Construction, civil construction, engineering and high tech engineering sectors
- Transport and Telecommunication
- Security
- Real estate
- Printing
- Electronics
- R&D and aerospace
- Architecture

7.4.2 All firms interviewed but one were SMEs (up to 249 employees). The majority were micro businesses (up to 10 employees), over one third had between 10 and 49 employees, two firms had between 50 to 249 employees. Most businesses thought a design adviser with experience of SMEs was important.

7.4.3 There was a wide spectrum of design skills that the consultant should have in order to meets the needs identified. They were

- Website and graphic design and generally all aspects of design
- Advertising, branding and marketing at local, national and global level
- Creativity skills
- General business skills (financial, sales, IT skills)
- Knowledge of the sectors in which firms belongs to.
- Audio technology and acoustic engineering
- Engineering skills specifically
- Electronics
- The ability to apply added value to new product
- The ability to advise and give direction regarding design

7.4.4 When we asked respondents if they would expect to pay for the design advice, the majority of them were "not sure". A quarter of respondents indicated that they would not expect to pay for the advice. Just under a quarter of respondents (8) would be willing to pay for the design support. We then asked those respondents who would be willing to pay if they could tell us how much. Two respondents were unable to answer and the remaining 6 all indicated that they would be willing to pay a day rate of less than £250 or a total fee (for cumulative days and/or a specific design task) of less than £1000.

7.4.5 There were no other special requirements apart from one interviewee who indicated that it would be very useful to have access to a database of designers where their specialism, costs, experience would be available.

8 Conclusions

8.1 Survey of Businesses

8.1.1 The main results from the survey of businesses are as follows:

- 45% of East Midlands businesses have grown moderately over the past 3 years, and 40% have stayed the same size. 57% of businesses aim to grow moderately, and 34% to stay the same size.
- Definitions of design vary between firms. The most common definitions were:
 - **“Design is about marketing/advertising (including websites)” (41%)**
 - **“Design is about promoting/branding the company” (38%)**
 - **“Design is about products/services looking attractive” (37%)**
 - **“Design is about working well to meet client needs” (35%).**

Comparatively few respondents (23%) said that design was used to develop products and services.

- **26% of respondents said that design had a significant role** to play in their business, and 17% that it was integral to the firm’s operation.
- The **most common barriers** to businesses using design and innovation were **cost, or finance in general (13%)**, lack of time (9%), and lack of skills (8%).
- While 43% of respondents reported no design activity, 17% employ an external design consultant when needed, 17% have their own internal designers but not a dedicated team or department, and 12% have a dedicated design team/department.
- 31% of respondents have developed or introduced new products, services, or processes in the last 3 years. 11% of respondents have developed or introduced new products, services, or processes **involving major innovation or design** in the last 3 years.
- 22% of firms have used external design advice in the last 3 years. Among these, the most common sources were other firms (34%), private design consultants (25%), and friends/colleagues (19%).
- **The most common design advice issues were marketing or advertising, including websites (53%)**, promotion and branding (28%), product development (26%), and service development (17%).
- Only 3% of those firms which had not used external design advice had sought it but not proceeded to use it.
- **37% of businesses thought that design would become more important over the next 3 years** in enabling the company to enhance or maintain a competitive position.
- 30% of businesses are likely to be developing existing or new **products or services** in the next 3 years, and 13% of businesses are likely to be developing existing or new **processes** in the next 3 years.
- **Some 23% of businesses thought they would required design advice in the next three years.** 10% of businesses thought that they possibly would, 7% that they probably would, and 6% that they definitely would.
- 63% of companies thought that they would probably not require design advice over the next 3 years. The remaining 14% were unsure.

- Among the 23% who definitely, probably, or possibly would require design advice:
 - **The most common requirements for advice were on marketing and advertising (including website design) (60%), promotion and branding (44%), product development (26%), and service development (17%).**
 - **25% said the support would include significant innovation, 32% advanced or new technologies, 25% advanced or new materials.**
 - **63% required better information on the design support available**
 - **48% one to one sought advice, and 36% workshops with businesses facing similar issues**
 - **One to one advice was typically envisaged as initial or light touch (by 81%), to be delivered at the business premises, by a general design consultant**
 - **19% sought in-depth support**
 - **89% required 1 to 2 days of one to one support and 11% required more than 2 days**
- The best ways to inform businesses about the design advice available were reported to be mailshots (30% of respondents), e-mail (22%), telephone contact (18%), and face-to-face discussions with an advisor (9%).
- In terms of the more detailed review of design needs which focused on those who required support at the time of the survey and over the next three years the main issues and requirements through the follow-up discussions were:
 - **Skills:** design skills, namely website design, graphic design, electronic design, design for high tech devices were on top of the list. Specific design IT skills were also an issue in some cases
 - **The cost: the need for grants was of paramount importance.** Grants were needed because firms could not afford the cost of bank loans and overdraft or simply could not access them
 - **Lack of time:** businesses said that it was mainly the lack of time to look for support and information about design and designers that was an issue
 - **External advice:** firms found it difficult to find external design expertise in a number of areas namely 3D modelling, graphic design for specific products, design of specific art work software, design of specific devices, eg the aerospace industry
 - **Product development was an important area:** catering equipment, specific types of sport wear using innovative materials, aerospace devices, specific devices for the telecom industry, specific electronic devices
 - **The type of marketing support** needed by the majority of firms was website design and development and updating websites
 - A number of firms were concerned with the **identification and development of new markets**
 - **Promotion and branding of businesses was an important area** for more than a quarter of businesses. Corporate identity was mentioned a number of times and corporate brochures and catalogues
 - A small minority of businesses indicated that the support would include significant innovation but this varied considerably
 - A small minority of businesses felt that the support would include significant technology advice, audio customizing technology and technologies of mechanical structural technologies were mentioned

- The businesses thought that the design adviser they sought would be preferred if they had a specific knowledge of the sector but this was not absolutely necessary
- **Most businesses thought a design adviser with experience of SMEs was important**
- There was a wide spectrum of specific design skills that the design consultants should have in order to meet the needs identified
- **A quarter of respondents indicated that they would not expect to pay for the advice.** Those who would pay indicated that they would be willing to pay a day rate of less than £250 or a total fee (for cumulative days and/or a specific design task) of less than £1000

Appendix A Survey Results Disaggregated by Industrial Sector

A1 Introduction

A1.1 The survey results in this appendix are disaggregated by industrial sector as follows:

- **ABCE**: Agriculture, fishing, forestry, extraction
- **D**: Manufacture
- **F**: Construction
- **G**: Wholesale and retail
- **H**: Leisure
- **I**: Transport, storage, and communications
- **JK**: Finance and business services
- **O**: Personal services

A1.2 The letters at the beginning of each definition refer to the coding scheme of the Standard Industrial Classification. For brevity, these codes are used as column headers in the following tables. As in the main report, statistically-significant results are highlighted in **bold text**.

A2 Respondent's Background and Characteristics

Table A2.1 What is the status of your business? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
An independent business	87	100	90	98	73	81	91	73	73
A subsidiary or branch of another UK business	12	0	7	2	25	14	9	27	27
A subsidiary or branch of an overseas business	2	0	3	0	1	5	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q6)

Table A2.2 For how many years has your business been trading? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Less than 3	12	0	17	17	13	16	20	7	7
4-5	14	50	17	22	11	13	9	5	5
6-10	16	0	16	15	17	23	20	17	17
More than 10	58	50	50	46	58	48	51	71	71

Source: PACEC Survey (Q7)

Table A2.3 How many employees does your business have now? (Please tick one. UK employees only)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
0-9	79	100	70	85	85	79	80	60	60
10-49	15	0	25	9	10	18	14	22	22
50-249	3	0	5	5	3	3	4	6	6
250-499	1	0	0	0	1	0	1	6	6
500+	2	0	0	0	1	0	0	7	7

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q8)

Table A2.4 What was the turnover of your business last year? (Please tick one. UK turnover only, if multinational)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Less than £100K	49	100	37	78	33	51	60	34	34
£100K-£200K	16	0	17	20	26	26	35	24	24
£200K-£500K	13	0	30	0	22	18	0	0	0
£500K-£1m	6	0	5	0	7	3	5	9	9
£1m-£5m	8	0	7	0	3	1	0	18	18
£5m-£10m	2	0	2	0	1	0	0	2	2
More than £10m	5	0	2	2	8	0	0	12	12

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q9)

Table A2.5 How has your turnover changed over the past three years? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Not trading	1	0	0	0	0	4	0	0	0
Grown smaller	8	25	4	18	7	6	20	2	2
Stayed same size	40	25	42	58	40	42	49	15	15
Grown moderately	45	50	54	23	50	36	31	70	70
Grown rapidly	6	0	0	1	3	11	0	14	14

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q10)

Table A2.6 How would you describe the overall growth objectives of your business? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Become smaller	5	25	6	0	4	0	0	1	1
Stay same size	34	25	22	59	35	48	44	14	14
Grow moderately	57	50	67	36	56	45	56	76	76
Grow rapidly	4	0	5	4	5	7	0	8	8

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q11)

Table A2.7 Can I ask you a question about whether your business is owned by a person / people from particular social groups, eg BMEs or women (note ownership is more than half of the equity / shares)? This question is optional. (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	50	75	27	30	48	62	39	26	26
No	43	25	56	69	42	32	55	60	60
Don't know	6	0	17	1	10	6	7	14	14

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12A)

Table A2.8 If yes, is your business owned by a person / any people from the following groups? (Please tick as appropriate) A black and minority ethnic group(BME):

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	24	0	24	0	31	46	31	28	28
No	75	100	57	100	68	53	69	72	72
Not Sure	1	0	20	0	2	1	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B1)

Table A2.9 Women:

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	45	0	52	24	57	48	65	44	44
No	54	100	48	76	42	51	35	56	56
Not Sure	1	0	0	0	2	1	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B2)

Table A2.10 People under 30 years of age:

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	21	0	4	24	28	13	0	18	18
No	78	100	76	76	70	86	100	82	82
Not Sure	1	0	20	0	2	1	0	0	0

Source: PACEC Survey (Q12B3)

Table A2.11 Disabled people:

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	6	0	0	0	8	5	0	18	18
No	92	100	80	100	90	94	100	82	82
Not Sure	2	0	20	0	2	1	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B4)

A3 The Definition and Importance of Design

**Table A3.1 How would you define design as it relates to your business?
Please tick definitions below**

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Design is used to develop products and services	23	0	33	13	20	19	5	37	37
Design is about working well to meet client needs	35	50	32	58	31	19	20	39	39
Design is about products / services looking attractive	37	0	37	60	45	36	5	24	24
Design is about marketing/advertising(including websites)	41	25	43	26	43	54	49	47	47
Design is about promoting / branding the company	38	0	22	36	42	51	9	44	44
Design is about packaging for products / services	17	0	22	4	23	24	0	18	18
Design is about improving production processes	8	0	5	4	2	2	0	15	15
Design is a strategic business tool	9	0	17	7	7	4	0	25	25
Not sure	21	50	24	7	17	18	31	5	5

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q13B)

Table A3.2 Which of the following that I read out most closely represents the role design plays in your business? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
It is integral to the firm's operation	17	0	32	18	18	4	0	40	40
It has a limited role to play	34	25	43	17	33	45	65	44	44
It has a significant role to play	26	25	12	44	28	30	5	12	12
It has no role to play at all	23	50	12	22	22	21	30	5	5

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q14)

A4 Barriers to Design

Table A4.1 What are the perceived / real barriers to your businesses using design and innovation more in its work? (Please tick all that apply)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Nothing	37	50	54	58	32	27	5	50	50
Not relevant to our work / business	21	0	11	0	16	5	45	11	11
Costs / finance generally	13	0	2	17	8	28	5	17	17
Don't know	13	0	16	7	18	15	24	14	14
Lack of time	9	0	10	7	16	15	20	11	11
Lack of skills	8	0	3	15	18	13	0	4	4
High cost / low return	5	25	6	0	4	16	0	5	5
Now clear / tangible rewards	4	50	0	4	2	13	1	5	5
Conservatism / traditionalism / reluctance to change	3	0	0	0	4	15	0	6	6
Standardised production practices	2	0	6	11	3	2	5	0	0
Lack of information about support for design	2	0	1	7	3	0	0	0	0
Difficult to find external design expertise or advice	2	0	1	9	3	3	0	0	0
Previous mistakes / failures	1	0	0	0	2	0	0	0	0
Organisational culture	1	0	0	7	0	2	0	1	1
Risks involved	0	0	0	0	0	0	0	1	1
Lack of understanding of intellectual property/patenting	0	0	0	0	0	0	0	0	0
Other	5	0	6	7	3	2	20	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q15A)

Table A4.2 Other perceived / real barriers to businesses using design and innovation more in their work

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
All design is done at Head Office	2	n/a	n/a	7	1	2	n/a	n/a	n/a
Regulations/legal framework	1	n/a	n/a	0	0	0	n/a	n/a	n/a
lack of work	0	n/a	n/a	0	0	0	n/a	n/a	n/a
Clients supply us with designs	0	n/a	n/a	0	0	0	n/a	n/a	n/a
Competitors copy our designs	0	n/a	n/a	0	0	0	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q15B)

Table A4.3 Main perceived / real barriers to businesses using design and innovation more in their work

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Lack of skills	4	0	1	15	10	3	0	0	0
Lack of time	3	0	1	0	4	7	20	6	6
High cost / low return	2	0	6	0	3	8	0	6	6
Costs / finance generally	10	0	3	7	5	15	0	13	13
Now clear / tangible rewards	2	50	0	0	2	8	0	0	0
Previous mistakes / failures	0	0	0	0	1	0	0	0	0
Nothing	38	50	59	58	34	27	5	51	51
Conservatism / traditionalism / reluctance to change	1	0	0	0	2	5	0	7	7
Lack of understanding of i.p. /patenting	0	0	0	0	0	0	0	0	0
Standardised production practices	2	0	6	4	3	2	0	0	0
Not relevant to our work / business	20	0	7	0	15	5	50	12	12
Lack of information about support for design	0	0	0	0	1	0	0	0	0
Difficult to find external design expertise or advice	1	0	0	1	0	3	0	0	0
Don't know	12	0	17	7	18	15	24	5	5
Other	4	0	1	7	3	2	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q15C)

A5 Design Practices

Table A5.1 Which of the following applies to your business? (Read out and tick all that apply)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Have a dedicated design team / department	12	0	8	7	15	9	5	30	30
own internal designer(s), no dedicated team / dept	17	25	22	23	8	4	0	33	33
Employ an external design consultant(s) when needed	17	25	19	41	14	30	0	18	18
Other approaches to design	19	0	6	15	29	22	4	21	21
No design activity	43	50	50	30	43	39	90	25	25

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q16A)

Table A5.2 Other approaches to design:

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Design done free of charge by client/member of staff	11	n/a	6	8	11	11	n/a	10	10
All design is done by Head office staff	5	n/a	0	0	13	6	n/a	0	0
Promotional Literature is provided by our suppliers	2	n/a	0	0	5	2	n/a	9	9
Supplement internal designers with outside specialists	0	n/a	0	0	0	0	n/a	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q16B)

Table A5.3 Has your business developed or introduced any new products / services or processes in the last 3 years? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	31	25	39	21	35	12	27	56	56
No	66	75	61	79	59	84	73	40	40
Don't know	2	0	0	0	5	4	0	5	5

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q17)

Table A5.4 Has your business developed or introduced any new products / services or processes involving major innovation / design in the last 3 years? (Please tick one)

	Percentage of all respondents (by sic)									
	Total	ABC E	D	F	G	H	I	JK	O	
Yes	11	0	20	10	4	2	26	18	18	
No	85	100	80	90	86	91	74	72	72	
Don't know	4	0	0	0	10	7	0	10	10	

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q18)

Table A5.5 Has your business used any external design advice from outside the company in the last 3 years? (Please tick one)

	Percentage of all respondents (by sic)									
	Total	ABC E	D	F	G	H	I	JK	O	
Yes	22	25	9	41	15	24	26	29	29	
No	70	75	89	51	73	73	70	52	52	
Don't know	8	0	2	7	13	3	4	18	18	

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19A)

Table A5.6 If yes, what sources of design advice have you used ? (Please tick all that apply)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Other firms	34	100	73	1	25	44	100	41	41
Private design consultant	25	0	61	36	0	2	0	47	47
Friends / colleagues	19	0	15	45	24	21	0	0	0
Internet / website	11	0	37	1	18	12	0	0	0
Business Link	9	0	0	18	16	0	0	18	18
Trade / Business Association	4	0	0	0	0	12	0	5	5
Chamber of Commerce	4	0	0	0	0	0	0	16	16
East Midlands Development Agency	2	0	12	0	0	0	0	5	5
Universities	1	0	12	0	0	0	0	0	0
Design Council	1	0	12	0	0	0	0	0	0
Email bulletins	1	0	0	0	0	0	0	0	0
Incubation / innovation centre	0	0	12	0	0	0	0	0	0
FE college	0	0	0	0	0	0	0	0	0
DTI (now BERR / DIUS)	0	0	0	0	0	0	0	0	0
A formal course / classes	0	0	12	0	0	0	0	0	0
An online course	0	0	12	0	0	0	0	0	0
Other	13	0	0	0	18	18	0	0	0
None	1	0	0	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19B)

Table A5.7 Other sources of design advice used:

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Trade/Industry/Sector publications	4	n/a	n/a	n/a	0	9	n/a	n/a	n/a
Advert in yellow pages	1	n/a	n/a	n/a	9	0	n/a	n/a	n/a
Clients/customers	1	n/a	n/a	n/a	0	0	n/a	n/a	n/a
Local Authority	1	n/a	n/a	n/a	0	0	n/a	n/a	n/a
Head Office	1	n/a	n/a	n/a	0	9	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q19C)

Table A5.8 Please identify the main source of design advice)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Other firms	30	n/a	61	1	25	44	100	41	41
Private design consultant	24	n/a	24	54	0	2	0	49	49
Friends / colleagues	16	n/a	15	45	24	21	0	0	0
Internet / website	8	n/a	0	1	18	12	0	0	0
Business Link	6	n/a	0	0	16	0	0	0	0
Trade / Business Association	2	n/a	0	0	0	12	0	5	5
East Midlands Development Agency	2	n/a	0	0	0	0	0	5	5
Chamber of Commerce	1	n/a	0	0	0	0	0	0	0
Universities	1	n/a	0	0	0	0	0	0	0
Other	10	n/a	0	0	18	9	0	0	0
None	1	n/a	0	0	0	0	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19D)

Table A5.9 For which sort of issues have you used external design advice? (Please prompt and tick as many as apply)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Marketing/advertising products/services(including websites)	53	100	37	58	52	91	100	11	11
Promotion / branding the company	28	0	40	27	26	39	0	34	34
Product development	26	0	48	18	12	9	0	28	28
Development of services	17	0	0	1	0	9	100	28	28
Production processes / delivery	7	0	12	1	10	0	0	16	16
Packaging for products / services	4	0	24	0	2	9	0	5	5
Developing design as a strategic business tool	4	0	12	0	0	9	0	18	18
Don't know	2	0	0	0	17	0	0	0	0
Other	6	0	0	0	8	9	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19V)

Table A5.10 If no, did you seek to use external design advice but did not proceed to use it? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	3	0	2	0	0	0	0	8	8
No	93	100	96	100	92	97	99	68	68
Don't know	4	0	2	0	8	3	1	24	24

Source: PACEC Survey (Q20A)

Table A5.11 If yes, what were the main reasons for your businesses not proceeding to use the advice? (Please prompt and tick as many as apply)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Too expensive	60	n/a	n/a	n/a	n/a	n/a	n/a	0	0
High cost and low return	20	n/a	n/a	n/a	n/a	n/a	n/a	100	100
Not accessible enough	16	n/a	n/a	n/a	n/a	n/a	n/a	0	0
Inappropriate skills / expertise	2	n/a	n/a	n/a	n/a	n/a	n/a	0	0
Lack of information about services for design	1	n/a	n/a	n/a	n/a	n/a	n/a	0	0
Confidentiality issues	0	n/a	n/a	n/a	n/a	n/a	n/a	0	0
Could not clarify what we needed	0	n/a	n/a	n/a	n/a	n/a	n/a	0	0
Not available quickly enough	0	n/a	n/a	n/a	n/a	n/a	n/a	0	0
Other	46	n/a	n/a	n/a	n/a	n/a	n/a	100	100

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q20B)**Table A5.12 Other main reasons for businesses not proceeding to use the advice**

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Website	27	n/a	n/a	n/a	n/a	n/a	n/a	0	0
Head office	19	n/a	n/a	n/a	n/a	n/a	n/a	100	100

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q20C)

A6 Design Support Needs

Table A6.1 Do you think design will become more important over the next 3 years in enabling the company to enhance / maintain a competitive position? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	37	0	37	51	37	39	27	61	61
No	41	75	39	34	41	32	30	32	32
Don't know	23	25	24	15	22	30	44	7	7

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q21)

Table A6.2 Are you likely to be developing any existing / new products / services in the next 3 years? (Please tick)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
No	59	75	61	87	55	63	73	46	46
Yes	30	25	32	13	25	25	0	48	48
Not Sure	11	0	7	0	20	12	27	6	6

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q22A1)

Table A6.3 Are you likely to be developing any existing / new processes in the next 3 years? (Please tick)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	13	0	21	4	6	0	1	39	39
No	73	100	68	86	72	82	73	50	50
Not Sure	14	0	10	10	22	18	26	12	12

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q22A2)

**Table A6.4 Do you think you may require design advice in the next 3 years?
(Please probe and tick)**

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Definitely	6	0	5	22	2	2	0	18	18
Probably	7	0	1	10	5	0	0	4	4
Possibly	10	0	9	9	7	13	21	6	6
Not sure	14	50	7	16	16	18	26	14	14
Probably not	63	50	78	43	69	68	53	59	59

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23A)

**Table A6.5 If definitely / probably / possibly, what would the support be for?
(Read out and tick as many as apply)**

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Marketing/advertising products/services(including websites)	60	n/a	16	59	65	49	95	34	34
Promotion / branding the company	44	n/a	24	77	48	51	0	18	18
Product development	26	n/a	90	22	41	10	0	35	35
Development of services	17	n/a	10	20	24	27	0	14	14
Production processes / delivery	8	n/a	8	4	8	10	0	0	0
Packaging for products / services	7	n/a	10	1	18	0	0	1	1
Developing design as a strategic business tool	7	n/a	16	0	8	14	0	39	39
Don't know	1	n/a	0	0	0	0	5	0	0
Other	6	n/a	8	0	8	10	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23B)

Table A6.6 Other design aspects for which support would be required

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Website	3	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Building expansion	2	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Head office	0	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23C)

Table A6.7 If definitely / probably / possible, would the support include? (Please probe and tick once per row)-Significant innovation

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	25	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
No	59	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Don't know	16	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23D1)

Table A6.8 Advanced / new technologies:

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	32	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
No	52	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Don't know	17	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23D2)

Table A6.9 Advanced / new materials:

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	25	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
No	59	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Don't know	16	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23D1)

Table A6.10 If definitely / probably / possible, how should design advice be delivered for you?.

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Better information on the design support available	63	n/a	50	74	71	99	0	25	25
One to one advice	48	n/a	48	45	37	10	95	47	47
Workshops with businesses facing similar issues	36	n/a	16	18	51	11	0	2	2
Networking events	30	n/a	8	18	10	10	0	36	36
An assessment to determine your design needs	27	n/a	24	18	16	36	5	38	38
An introduction to design advisers	26	n/a	36	18	21	25	0	21	21

Respondents could select more than one option; so percentages in any column may sum to more than 100.
A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23F)

Table A6.11 Main delivery method required

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Better information on the design support available	49	n/a	26	74	54	75	0	22	22
One to one advice	21	n/a	60	26	13	0	100	20	20
An introduction to design advisers	11	n/a	13	0	6	0	0	21	21
An assessment to determine your design needs	7	n/a	0	0	0	25	0	19	19
Workshops with businesses facing similar issues	6	n/a	0	0	21	0	0	0	0
Networking events	6	n/a	0	0	6	0	0	17	17

Source: PACEC Survey (Q23G)

Table A6.12 if one to one advice (please tick once per row) -Number of days?

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
1	62	n/a	38	93	60	83	100	25	25
2	27	n/a	25	0	34	17	0	21	21
3-5	8	n/a	25	0	6	0	0	28	28
6-10	2	n/a	13	7	0	0	0	27	27
11+	0	n/a	0	0	0	0	0	0	0

Source: PACEC Survey (Q23N)

Table A6.13 Depth?

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Initial / light touch	81	n/a	50	100	87	100	100	29	29
In depth	19	n/a	50	0	13	0	0	71	71

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)

Source: PACEC Survey (Q23O1)

Table A6.14 Where?

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
At the Business premises	81	n/a	92	39	93	100	100	95	95
Elsewhere / Other site	19	n/a	8	61	7	0	0	5	5

Source: PACEC Survey (Q23O2)

Table A6.15 Type?

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
General Design Consultant	75	n/a	71	74	73	99	100	69	69
Specialist Design Consultant	25	n/a	29	26	27	1	0	31	31
Number of respondents	117	n/a	2	8	22	8	2	4	4
<i>Effective Sample Size</i>	85	0	10	2	15	5	2	6	6

Source: PACEC Survey (Q23O3)

Table A6.16 If specialist design consultants (please tick as many as apply)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Your sector	42	n/a	75	11	51	n/a	0	42	42
Products / services	40	n/a	25	71	49	n/a	100	31	31
Technologies	32	n/a	0	71	27	n/a	0	55	55
Processes	15	n/a	0	11	0	n/a	0	40	40
Other	18	n/a	13	18	22	n/a	0	1	1

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23P)

Table A6.17 Other specialist design consultants

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Interior design	5	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Website design	3	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23Q)

Table A6.18 What is the best way to inform you about the design advice available? (Please prompt and tick all those that apply)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Mailshots	30	25	44	45	16	34	1	38	38
Email	22	25	17	47	13	12	0	41	41
Telephone contact	18	0	5	30	16	18	1	16	16
Discussions with an adviser- telephone	14	0	4	10	16	15	0	12	12
Websites	10	25	4	21	9	0	1	33	33
Trade journals	10	0	14	14	11	2	52	1	1
Discussions with an adviser-face-to-face	9	0	2	7	8	13	0	13	13
Press	4	0	9	2	5	0	26	9	9
Radio / TV	3	0	1	0	4	0	26	0	0
Events	2	0	7	5	0	5	0	5	5
Other	35	25	37	15	45	36	20	21	21

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)

Source: PACEC Survey (Q24A)

Table A6.19 Other ways of informing about the availability of design advice

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Not needed/relevant	25	25	25	15	21	24	8	20	20
Through Head office	5	0	0	0	14	6	12	0	0
Through Chamber of Commerce	1	0	0	0	2	0	0	0	0
Leaflets/flyers	0	0	0	0	0	0	0	0	0
Specialist/niche service not available	0	0	0	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)

Source: PACEC Survey (Q24B)

Table A6.20 Other ways to inform businesses about the availability of Design advice

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Mailshots	19	25	37	29	11	34	0	26	26
Email	14	25	9	19	10	10	0	25	25
Telephone contact	7	0	8	10	9	3	0	7	7
Trade journals	6	0	0	11	7	2	52	1	1
Discussions with an adviser-face-to-face	5	0	0	0	4	3	0	7	7
Discussions with an adviser- telephone	5	0	1	0	6	9	0	0	0
Websites	5	25	1	12	3	0	1	8	8
Press	1	0	0	0	2	0	0	5	5
Radio / TV	1	0	0	0	3	0	26	0	0
Events	0	0	6	0	0	2	0	0	0
Other	35	25	37	19	45	36	20	21	21

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q24C)

Table A6.21 Do you have any other comments on design? (Please tick one)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
Yes	21	0	30	18	16	18	21	35	35
No	79	100	70	82	84	82	79	65	65

Source: PACEC Survey (Q25A)

Table A6.22 If yes, please state? (Please give details)

	Percentage of all respondents (by sic)								
	Total	ABC E	D	F	G	H	I	JK	O
I/we do all the design work myself	7	n/a	8	2	4	8	0	2	2
Design has no part to play in our business	6	n/a	31	1	3	3	0	22	22
Design is necessary to keep up with material/technology	5	n/a	2	18	3	3	0	7	7
Helps us stand out/get noticed	3	n/a	0	9	2	1	0	7	7
Needed to keep up with fashion	3	n/a	0	0	1	5	0	7	7
Design of premises sets the atmosphere	2	n/a	0	0	4	3	0	0	0
Without it we would not have a business	1	n/a	0	0	0	0	0	0	0
Design service is provided by our suppliers	1	n/a	2	9	1	0	27	0	0
Needed to make products/services functional/practical	1	n/a	0	0	1	3	0	0	0
It would be useful to have a database of approved designers	0	n/a	2	9	0	0	0	0	0
Cost of design is a big factor	0	n/a	0	0	0	0	0	0	0
British designers need to our support	0	n/a	2	0	0	0	0	0	0
Niche industry - no external design available	0	n/a	0	0	1	0	0	0	0
Past experience has taught us not to invest in design	0	n/a	0	0	0	0	0	0	0
Necessary for production processes/quality	0	n/a	0	0	0	0	0	0	0
Design needed to make packaging environmentally friendly	0	n/a	0	0	1	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q25B)

Appendix B Survey Results Disaggregated by County

B1 Respondent's Background and Characteristics

Table B1.1 What are the main products or services of your business? (Write in description. Make clear whether firm is in manufacturing or services)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Agriculture/Extraction	5	1	14	5	4	2
Non-metallic, non-chemical manufacture	6	5	3	6	4	9
Chemical manufacture	1	2	1	1	2	1
Trad metal man/engineering	4	4	4	4	2	6
Hi-Tech metal man/engineering	1	2	0	2	0	1
Electricity, gas, water, waste	0	0	0	0	0	0
Construction	15	16	14	18	16	11
Motor vehicle sale, repair	3	6	2	3	3	3
Wholesale	4	4	7	4	4	3
Retail	20	17	19	21	23	22
Hotels and restaurants	9	6	9	11	8	10
Transport, storage, communications	5	5	4	5	7	5
Financial intermediation	2	3	3	2	2	3
Property, renting	4	7	4	2	3	3
Computing, R&D	1	2	0	1	1	1
Business services	11	9	9	9	16	16
Public admin, defence	0	1	0	0	0	0
Education	0	1	0	0	0	1
Health, care	1	2	2	2	1	0
Personal services	5	7	5	3	4	4

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (pacec22)

Table B1.2 What is the status of your business? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
An independent business	87	80	88	88	88	89
A subsidiary or branch of another UK business	12	18	11	10	10	9
A subsidiary or branch of an overseas business	2	2	1	2	2	1

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q6)

Table B1.3 For how many years has your business been trading? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Less than 3	12	18	10	8	14	12
4-5	14	15	10	13	14	15
6-10	16	18	13	18	13	15
More than 10	58	49	68	61	59	57

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q7)

Table B1.4 How many employees does your business have now? (Please tick one. UK employees only)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
0-9	79	77	82	76	80	81
10-49	15	16	13	19	12	15
50-249	3	4	3	4	2	2
250-499	1	2	0	1	1	0
500+	2	1	2	1	4	2

Source: PACEC Survey (Q8)

Table B1.5 What was the turnover of your business last year? (Please tick one. UK turnover only, if multinational)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Less than £100K	49	48	57	45	49	50
£100K-£200K	16	22	18	15	13	13
£200K-£500K	13	14	8	11	15	15
£500K-£1m	6	5	2	11	7	7
£1m-£5m	8	6	7	11	5	10
£5m-£10m	2	1	3	0	4	2
More than £10m	5	4	4	7	8	3

Source: PACEC Survey (Q9)

Table B1.6 How has your turnover changed over the past three years? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Not trading	1	1	3	0	0	3
Grown smaller	8	8	7	9	8	9
Stayed same size	40	38	33	45	45	40
Grown moderately	45	49	50	40	42	42
Grown rapidly	6	5	6	6	5	5

Source: PACEC Survey (Q10)

Table B1.7 How would you describe the overall growth objectives of your business? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Become smaller	5	5	6	5	3	4
Stay same size	34	29	33	43	32	33
Grow moderately	57	61	56	47	62	60
Grow rapidly	4	5	4	5	3	3

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q11)

Table B1.8 Can I ask you a question about whether your business is owned by a person / people from particular social groups, eg BMEs or women (note ownership is more than half of the equity / shares)? This question is optional. (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	51	36	49	55	53	62
No	43	55	44	40	43	33
Don't know	6	9	8	5	4	5

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12A)

Table B1.9 If yes, is your business owned by a person / any people from the following groups? (Please tick as appropriate) A black and minority ethnic group(BME):

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	24	22	9	17	31	41
No	74	73	90	83	68	59
Not Sure	1	6	1	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B1)

Table B1.10 Women:

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	45	53	50	37	48	44
No	54	45	48	63	52	56
Not Sure	1	2	1	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B2)

Table B1.11 People under 30 years of age:

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	21	17	11	20	25	29
No	78	77	88	80	75	71
Not Sure	1	6	1	0	0	0

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B3)

Table B1.12 Disabled people:

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	6	3	7	2	4	12
No	92	91	92	98	93	86
Not Sure	2	6	1	0	3	2

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q12B4)

B2 The Definition and Importance of Design

**Table B2.1 How would you define design as it relates to your business?
Please tick definitions below**

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Design is used to develop products and services	23	20	25	26	24	18
Design is about working well to meet client needs	35	35	42	33	35	33
Design is about products / services looking attractive	37	35	42	42	37	31
Design is about marketing/advertising(including websites)	41	44	36	43	36	43
Design is about promoting / branding the company	38	37	34	39	38	42
Design is about packaging for products / services	17	21	26	19	14	5
Design is about improving production processes	8	6	10	10	7	5
Design is a strategic business tool	9	9	13	9	5	6
Not sure	21	15	30	24	20	20

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q13B)

Table B2.2 Which of the following that I read out most closely represents the role design plays in your business? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
It is integral to the firm's operation	17	20	16	16	14	17
It has a limited role to play	34	34	32	32	35	39
It has a significant role to play	26	29	24	22	27	26
It has no role to play at all	23	17	28	30	23	18

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q14)

B3 Barriers to Design

Table B3.1 What are the perceived / real barriers to your businesses using design and innovation more in its work? (Please tick all that apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Nothing	37	42	39	38	27	38
Not relevant to our work / business	21	13	21	23	29	23
Costs / finance generally	13	13	15	7	13	20
Don't know	13	13	12	17	21	5
Lack of time	9	10	8	6	6	16
Lack of skills	8	9	6	5	4	15
High cost / low return	5	5	3	6	7	5
Now clear / tangible rewards	4	5	4	4	3	3
Conservatism / traditionalism / reluctance to change	3	3	3	0	3	5
Standardised production practices	2	4	2	2	1	3
Lack of information about support for design	2	4	1	1	1	1
Difficult to find external design expertise or advice	2	3	0	3	0	3
Previous mistakes / failures	1	1	1	0	1	1
Organisational culture	1	1	2	0	0	0
Risks involved	0	0	0	0	0	0
Lack of understanding of intellectual property/patenting	0	0	0	0	1	0
Other	5	5	6	6	3	2

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)

Source: PACEC Survey (Q15A)

Table B3.2 Other perceived / real barriers to businesses using design and innovation more in their work

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
All design is done at Head Office	2	2	3	3	1	1
Regulations/legal framework	1	0	1	1	2	0
lack of work	0	0	0	1	0	1
Clients supply us with designs	0	1	1	0	0	0
Competitors copy our designs	0	0	0	0	1	0

Respondents could select more than one option; so percentages in any column may sum to more than 100

Source: PACEC Survey (Q15B)

Table B3.3 Main perceived / real barriers to businesses using design and innovation more in their work

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Lack of skills	4	3	4	3	3	7
Lack of time	3	5	1	2	3	5
High cost / low return	2	2	2	3	1	4
Costs / finance generally	10	9	12	4	12	13
Now clear / tangible rewards	2	3	2	4	1	1
Previous mistakes / failures	0	0	1	0	0	0
Nothing	38	43	38	38	28	39
Conservatism / traditionalism / reluctance to change	1	3	1	0	1	2
Lack of understanding of i.p. /patenting	0	0	1	0	0	0
Standardised production practices	2	3	0	1	1	3
Not relevant to our work / business	20	12	20	21	27	20
Lack of information about support for design	0	1	0	0	0	1
Difficult to find external design expertise or advice	1	0	0	1	0	1
Don't know	12	12	12	16	20	3
Other	4	3	6	7	3	1

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q15C)

B4 Design Practices

Table B4.1 Which of the following applies to your business? (Read out and tick all that apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Have a dedicated design team / department	12	16	9	10	10	13
own internal designer(s), no dedicated team / dept	17	20	7	13	19	24
Employ an external design consultant(s) when needed	17	21	13	11	18	20
Other approaches to design	19	18	27	11	19	22
No design activity	43	37	47	59	43	30

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q16A)

Table B4.2 Other approaches to design:

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Design done free of charge by client/member of staff	11	7	21	6	10	14
All design is done by Head office staff	5	8	3	4	5	3
Promotional Literature is provided by our suppliers	2	2	3	1	1	3
Supplement internal designers with outside specialists	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q16B)

Table B4.3 Has your business developed or introduced any new products / services or processes in the last 3 years? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	31	33	30	25	28	40
No	66	66	67	71	69	59
Don't know	2	2	3	4	3	1

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q17)

Table B4.4 Has your business developed or introduced any new products / services or processes involving major innovation / design in the last 3 years? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	11	13	6	10	11	14
No	85	83	89	83	88	81
Don't know	4	4	5	6	1	5

Source: PACEC Survey (Q18)

Table B4.5 Has your business used any external design advice from outside the company in the last 3 years? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	22	23	16	20	27	27
No	70	68	74	74	69	64
Don't know	8	9	10	6	5	9

Source: PACEC Survey (Q19A)

Table B4.6 If yes, what sources of design advice have you used ? (Please tick all that apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Other firms	34	30	46	18	31	48
Private design consultant	25	29	18	20	47	13
Friends / colleagues	19	15	13	15	30	21
Internet / website	11	11	22	20	6	3
Business Link	9	16	0	7	0	15
Trade / Business Association	4	1	0	5	5	7
Chamber of Commerce	4	4	1	4	0	10
East Midlands Development Agency	2	5	2	3	0	0
Universities	1	1	0	1	1	1
Design Council	1	1	0	0	0	3
Email bulletins	1	0	2	0	0	3
Incubation / innovation centre	0	1	0	0	0	0
FE college	0	0	0	0	0	0
DTI (now BERR / DIUS)	0	0	0	0	0	0
A formal course / classes	0	1	0	1	0	0
An online course	0	1	0	0	0	0
Other	13	7	11	15	15	17
None	1	0	0	0	0	3

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19B)

Table B4.7 Other sources of design advice used:

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Trade/Industry/Sector publications	4	n/a	7	1	9	7
Advert in yellow pages	1	n/a	0	5	0	0
Clients/customers	1	n/a	0	5	0	1
Local Authority	1	n/a	2	0	0	2
Head Office	1	n/a	0	0	0	2

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q19C)

Table B4.8 Please identify the main source of design advice)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Other firms	30	26	47	18	22	44
Private design consultant	24	32	18	17	47	8
Friends / colleagues	16	16	13	15	20	16
Internet / website	8	5	18	18	0	3
Business Link	6	7	0	5	0	12
Trade / Business Association	2	1	0	5	0	1
East Midlands Development Agency	2	5	2	2	0	0
Chamber of Commerce	1	0	0	4	0	1
Universities	1	0	0	1	1	1
Other	10	8	2	15	9	11
None	1	0	0	0	0	3

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19D)

Table B4.9 For which sort of issues have you used external design advice? (Please prompt and tick as many as apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Marketing/advertising products/services(including websites)	53	42	52	48	67	57
Promotion / branding the company	28	42	20	21	37	15
Product development	26	19	25	33	35	21
Development of services	17	14	27	3	11	32
Production processes / delivery	7	5	10	7	0	13
Packaging for products / services	4	3	14	1	1	7
Developing design as a strategic business tool	4	5	12	7	1	1
Don't know	2	7	0	0	0	0
Other	6	3	14	2	11	6

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q19V)

Table B4.10 If no, did you seek to use external design advice but did not proceed to use it? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	3	3	0	2	0	9
No	93	92	92	94	99	90
Don't know	4	5	8	4	1	2

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q20A)

Table B4.11 If yes, what were the main reasons for your businesses not proceeding to use the advice? (Please prompt and tick as many as apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Too expensive	60	54	n/a	93	n/a	54
High cost and low return	20	46	n/a	0	n/a	18
Not accessible enough	16	0	n/a	0	n/a	29
Inappropriate skills / expertise	2	0	n/a	0	n/a	0
Lack of information about services for design	1	0	n/a	7	n/a	0
Confidentiality issues	0	0	n/a	0	n/a	0
Could not clarify what we needed	0	0	n/a	0	n/a	0
Not available quickly enough	0	0	n/a	0	n/a	0
Other	46	90	n/a	0	n/a	46

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q20B)

Table B4.12 Other main reasons for businesses not proceeding to use the advice

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Website	27	0	n/a	n/a	n/a	46
Head office	19	90	n/a	n/a	n/a	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q20C)

B5 Design Support Needs

Table B5.1 Do you think design will become more important over the next 3 years in enabling the company to enhance / maintain a competitive position? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	37	42	32	35	34	40
No	41	33	47	35	37	51
Don't know	23	25	21	30	29	9

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q21)

Table B5.2 Are you likely to be developing any existing / new products / services in the next 3 years? (Please tick)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
No	59	63	54	66	60	51
Yes	30	27	31	24	31	40
Not Sure	11	10	16	11	8	9

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q22A1)

Table B5.3 Are you likely to be developing any existing / new processes in the next 3 years? (Please tick)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	13	16	9	10	17	11
No	73	70	72	76	70	77
Not Sure	14	14	19	14	12	12

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q22A2)

Table B5.4 Do you think you may require design advice in the next 3 years? (Please probe and tick)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Definitely	6	8	5	2	11	6
Probably	7	4	3	4	9	14
Possibly	10	10	7	10	8	15
Not sure	14	16	14	11	13	14
Probably not	63	62	71	73	59	51

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23A)

Table B5.5 If definitely / probably / possibly, what would the support be for? (Read out and tick as many as apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Marketing/advertising products/services(including websites)	60	47	55	56	63	69
Promotion / branding the company	44	48	37	40	41	48
Product development	26	33	24	36	24	18
Development of services	17	20	12	7	24	18
Production processes / delivery	8	5	22	2	6	10
Packaging for products / services	7	2	18	8	6	5
Developing design as a strategic business tool	7	14	1	1	5	8
Don't know	1	0	0	1	0	3
Other	6	5	15	0	14	3

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23B)

Table B5.6 Other design aspects for which support would be required

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Website	3	n/a	20	n/a	5	0
Building expansion	2	n/a	2	n/a	5	2
Head office	0	n/a	0	n/a	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23C)

Table B5.7 If definitely / probably / possible, would the support include? (Please probe and tick once per row)-Significant innovation

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	25	n/a	13	n/a	30	26
No	59	n/a	61	n/a	46	62
Don't know	16	n/a	26	n/a	24	12

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23D1)

Table B5.8 Advanced / new technologies:

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	32	n/a	27	n/a	39	27
No	52	n/a	51	n/a	40	56
Don't know	17	n/a	22	n/a	21	17

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23D2)

Table B5.9 Advanced / new materials:

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	25	n/a	13	n/a	30	26
No	59	n/a	61	n/a	46	62
Don't know	16	n/a	26	n/a	24	12

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23D1)

Table B5.10 If definitely / probably / possible, how should design advice be delivered for you?.

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Better information on the design support available	63	38	86	78	53	73
One to one advice	48	54	55	31	49	49
Workshops with businesses facing similar issues	36	20	28	20	42	54
Networking events	30	13	21	30	39	41
An assessment to determine your design needs	27	21	48	20	33	24
An introduction to design advisers	26	23	41	17	42	18

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23F)

Table B5.11 Main delivery method required

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Better information on the design support available	49	33	72	48	38	63
One to one advice	21	36	5	17	22	17
An introduction to design advisers	11	14	3	3	27	5
An assessment to determine your design needs	7	6	11	19	6	1
Workshops with businesses facing similar issues	6	7	0	0	0	14
Networking events	6	4	9	12	8	1

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23G)

Table B5.12 if one to one advice (please tick once per row) -Number of days?

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
1	62	73	46	45	65	63
2	27	12	43	48	14	30
3-5	8	8	10	1	21	6
6-10	2	7	0	4	0	0
11+	0	0	0	2	0	1

Source: PACEC Survey (Q23N)

Table B5.13 Depth?

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Initial / light touch	81	76	71	82	77	86
In depth	19	24	29	18	23	14

Source: PACEC Survey (Q23O1)

Table B5.14 Where?

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
At the Business premises	81	77	100	100	56	80
Elsewhere / Other site	19	23	0	0	44	20

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q23O2)

Table B5.15 Type?

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
General Design Consultant	75	70	84	81	76	74
Specialist Design Consultant	25	30	16	19	24	26

Source: PACEC Survey (Q23O3)

Table B5.16 If specialist design consultants (please tick as many as apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Your sector	42	47	11	25	83	38
Products / services	40	36	20	63	73	36
Technologies	32	39	27	14	27	31
Processes	15	13	0	0	27	21
Other	18	4	69	20	0	20

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)

Source: PACEC Survey (Q23P)

Table B5.17 Other specialist design consultants

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Interior design	5	n/a	n/a	n/a	n/a	10
Website design	3	n/a	n/a	n/a	n/a	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q23Q)

Table B5.18 What is the best way to inform you about the design advice available? (Please prompt and tick all those that apply)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Mailshots	30	30	26	31	31	32
Email	22	25	12	17	26	29
Telephone contact	18	12	13	20	20	25
Discussions with an adviser- telephone	14	10	13	13	17	16
Websites	10	16	7	11	4	11
Trade journals	10	15	4	8	11	9
Discussions with an adviser-face-to-face	9	9	8	5	9	12
Press	4	5	1	2	2	8
Radio / TV	3	2	3	0	2	6
Events	2	5	1	1	0	3
Other	35	31	47	42	36	21

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q24A)

Table B5.19 Other ways of informing about the availability of design advice

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Not needed/relevant	25	19	42	26	29	15
Through Head office	5	9	3	8	4	2
Through Chamber of Commerce	1	0	1	1	0	1
Leaflets/flyers	0	0	0	0	1	0
Specialist/niche service not available	0	0	0	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100.

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q24B)

Table B5.20 Other ways to inform businesses about the availability of Design advice

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Mailshots	19	21	17	19	17	21
Email	14	15	8	14	18	16
Telephone contact	7	5	5	6	7	13
Trade journals	6	11	3	3	10	6
Discussions with an adviser-face-to-face	5	4	1	4	7	9
Discussions with an adviser- telephone	5	2	9	7	5	4
Websites	5	6	4	4	2	7
Press	1	1	1	1	0	2
Radio / TV	1	1	2	0	0	2
Events	0	1	1	0	0	0
Other	35	33	47	42	34	20

A number is shown in bold where, taking into account the margin of error due to sampling, we are 95% certain that it is different from the number in the left hand total column (using a Chi-Squared statistical test)
Source: PACEC Survey (Q24C)

Table B5.21 Do you have any other comments on design? (Please tick one)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
Yes	21	25	26	18	22	15
No	79	75	74	82	78	85

Source: PACEC Survey (Q25A)

Table B5.22 If yes, please state? (Please give details)

	Percentage of all respondents (by Status County in which business is located)					
	Total	Notts	Lincs	Derbs	Northants	Leics
I/we do all the design work myself	7	5	12	9	2	7
Design has no part to play in our business	6	13	5	2	7	3
Design is necessary to keep up with material/technology	5	5	7	4	9	2
Helps us stand out/get noticed	3	4	4	3	1	2
Needed to keep up with fashion	3	2	3	1	8	0
Design of premises sets the atmosphere	2	2	0	2	3	2
Without it we would not have a business	1	0	0	1	0	3
Design service is provided by our suppliers	1	4	1	0	2	0
Needed to make products/services functional/practical	1	0	5	0	2	0
It would be useful to have a database of approved designers	0	2	0	0	0	0
Cost of design is a big factor	0	0	0	1	0	0
British designers need to our support	0	0	0	0	0	0
Niche industry - no external design available	0	0	1	0	0	0
Past experience has taught us not to invest in design	0	0	0	1	0	0
Necessary for production processes/quality	0	0	1	0	0	0
Design needed to make packaging environmentally friendly	0	0	1	0	0	0

Respondents could select more than one option; so percentages in any column may sum to more than 100
Source: PACEC Survey (Q25B)