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SOE3/P2/E0866

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# Digital maturity diagnosis

## Quantitative analysis

December 2020



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# Digital maturity diagnosis Quantitative analysis

## METHODOLOGIE



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In this report are presented all the results from the digital maturity diagnosis in the Textile value chain.

66 companies in the Textiles / Fashion sector (26 from France, 20 from Portugal and 20 from Spain) responded to the online diagnosis (Google form).

This is structured around seven thematises which cover a 360 ° vision of the company activities:

- Purchasing / supplier relations
- Production
- Marketing / Branding
- Sales / Customers relationship
- Human resources
- Strategic developments
- Identification

These results are detailed by country (France, Portugal and Spain), by main market (Home textiles, Technical textiles and Fashion / Apparel), company size (number of employees), and by type of customer (B to B, B to C or both).

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# Digital maturity diagnosis Quantitative analysis

## PRINCIPLE RESULTS



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① The impact of digital technology is generally considered to be very positive by companies, who see it as a factor of innovation and positive change. Moreover, the majority of company managers make a link between the development of their companies and the progress made in digital technology.

② Initiators and drivers of the digital transformation in their companies, less than a quarter of company managers have fully appropriated digital tools. Similarly, teams are mixed, with only 1 manager out of 3 being fully aware of the opportunities offered by digital technology and just over half of employees having a real interest in this subject.

③ The main constraints to the implementation of a digital transformation plan lie in the difficulty for company managers, on the one hand, to have a short-term vision and, on the other hand, to establish a digital roadmap in the medium term (strategic priority axes for digital transformation).

④ The obstacles to digital transformation are first of all financial, immediately followed by obstacles linked to human resources, in particular concerning digital know-how and skills, especially for VSEs (MICRO companies).

⑤ Paradoxically, recourse to training in the uses or tools of digital technology is not yet a reflex, with less than half of the companies having made use of it recently, particularly in SMEs (MICRO and small companies). In the same way, for recruitment purposes, skills needs related to digital technologies are specified less than half of the time.

⑥ The digital transformation of the company acts in relations with suppliers and customers: relations are becoming digital.

For the former, for the vast majority of companies, the relationship is only partially digitised today; for the latter, while 94% of companies consider that their customers are open to digitisation, surprisingly, only 44% regularly use digital technology in their relationships. In the same way, 15% of them consider that they are "Late" their customers in terms of digital adoption and therefore need to progressively update their practices.

⑦ Digital is first and foremost an image vector (company brand / employer brand / product brand) and has become part of company standards. Companies have massively developed internet sites (image or sales), most of them pay attention to their reputation on the web and communicate via social networks. On the other hand, less than half of them regularly update their website (except for B-to-C companies) and for VSEs (MICRO companies), a majority of them are lagging behind in terms of communication.

⑧ The majority of companies are still under-equipped with digital tools for supplier and customer relationship management, as well as for production management and automation: 61% of them consider themselves to have a low to medium level of automation.

⑨ The results of the diagnosis highlight strong differences, depending on the country, the size of the company and the type of clientele (B-to-B or B-to-C).

⑩ Finally, one of the main opportunities lies in the new technologies which should (still) profoundly transform the professions and customer/supplier relations: robotization, Internet of Things, augmented reality, 3D printing, traceability - block chain, artificial intelligence, smart textiles, etc...

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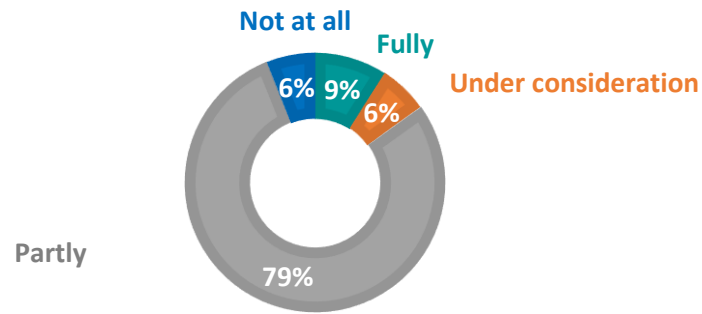
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**Digital maturity diagnosis**  
**Quantitative analysis**

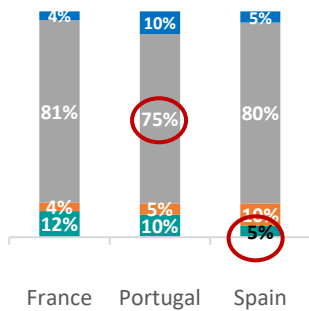
**PURCHASING / SUPPLIER RELATIONS**



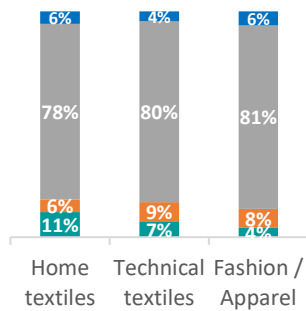
## 1- IS THE RELATIONSHIP WITH YOUR SUPPLIERS DIGITALIZED (DEMATERIALIZATION OF DOCUMENTS, INVOICING, REFERENCING, STOCK MANAGEMENT)?



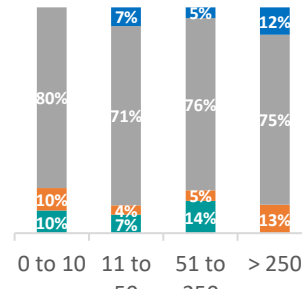
### Country



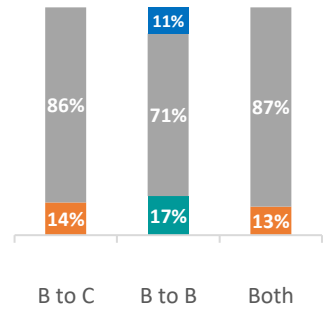
### Main market



### Company size

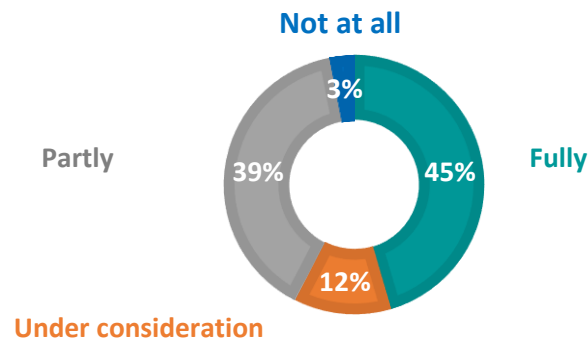


### Type of customers

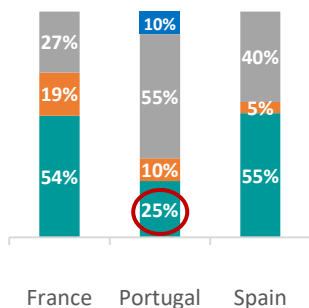


**Comments:** The relationship with suppliers is today only partially digitalized for the vast majority of companies (79%), with a very slight delay for Portuguese companies (75%). On the contrary, we observe that 9% of the companies have "Fully" digitalized their relations with suppliers, only B to B companies, with a slight delay for Spanish companies (5%) and companies with more than 250 employees (Big Company: 0%).

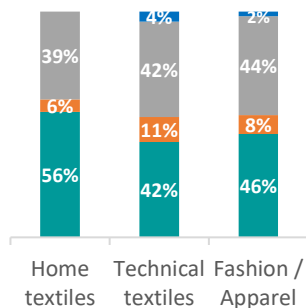
## 2- DO YOU SHARE DATA WITH YOUR SUPPLIERS IN ORDER TO BUILD TOGETHER NEW PRODUCT OR SERVICE OFFERS (CUSTOMER DATA, SALES STATISTICS)?



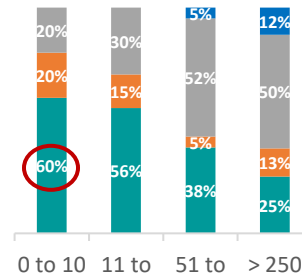
### Country



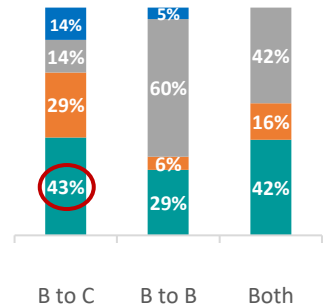
### Main market



### Company size

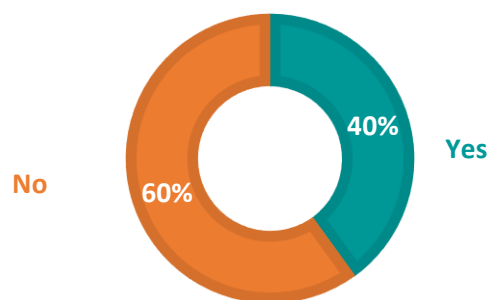


### Type of customers

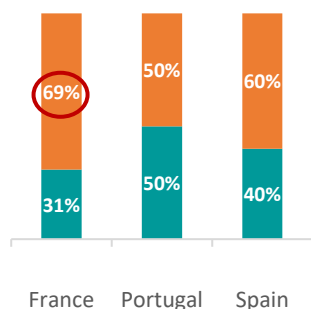


**Comments:** Data sharing with suppliers is increasing with just under half of the companies (45%), mainly in France (54%) and Spain (55%) with Portuguese companies lagging behind (25%). This is all the more true when the company works in B to C (43%). Companies with 10 employees or less (MICRO) are also leading on this point with 60% of them sharing their data "Fully" with suppliers.

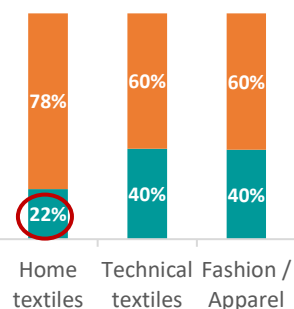
### 3- DOES YOUR COMPANY HAS A SCM (SUPPLY CHAIN MANAGEMENT) SYSTEM?



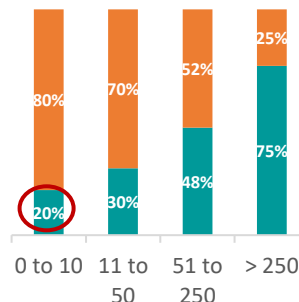
Country



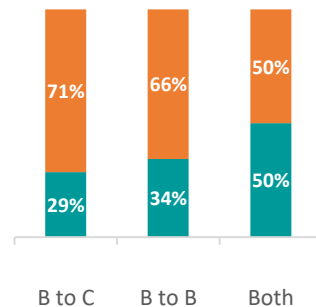
Main market



Company size



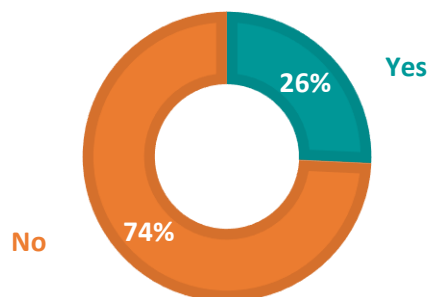
Type of customers



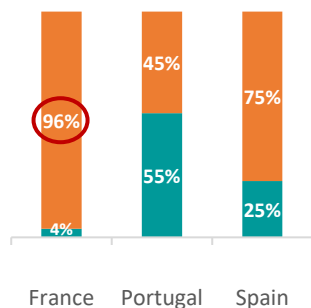
**Comments:** The majority of companies are not equipped with SCM (Supply Chain Management) systems (60%). French companies are even less so (69%) while Portuguese companies are much better equipped (50%). The equipment rate increases with the size of the company (Big Company: 75% – MICRO: 20%).

The Technical Textile and Fashion / Apparel markets are the best equipped (40%) while the Home Textile market is less equipped (22%).

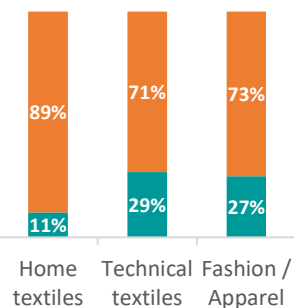
### 4-DOES YOUR COMPANY HAS A PLM SYSTEM (PRODUCT LIFE MANAGEMENT)?



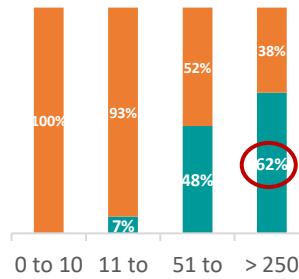
Country



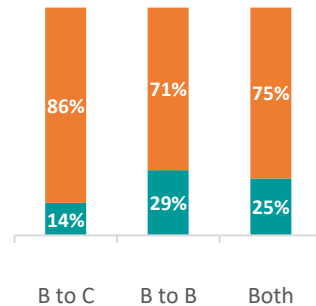
Main market



Company size



Type of customers



**Comments:** Most companies are not equipped with PLM (Product Life Management) systems (74%). French companies are not equipped (96%) while Portuguese companies are much better equipped (45%). The equipment rate increases with the size of the company (Big Company: 62% – MICRO: 0%). The Technical Textile and Fashion / Apparel markets are the best equipped (29% and 27% respectively) while the Home Textile market is less so (11%).

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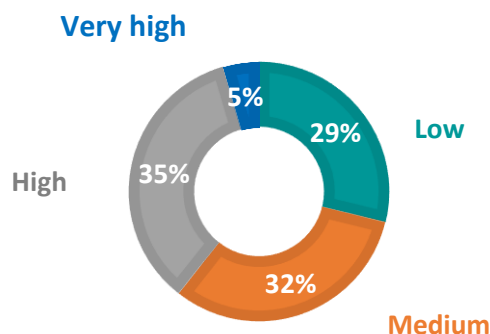
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**Digital maturity diagnosis**  
**Quantitative analysis**

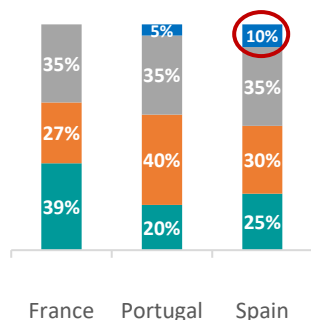
**PRODUCTION**



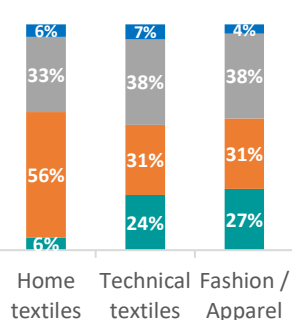
## 5- WHICH LEVEL OF AUTOMATIZATION DO YOU THINK THAT YOUR PRODUCTION SYSTEM HAS?



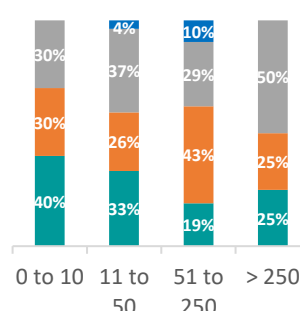
### Country



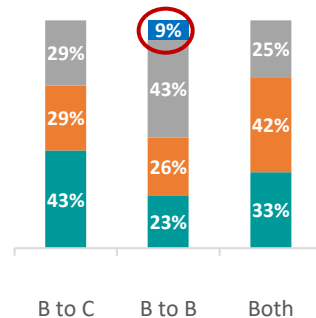
### Main market



### Company size

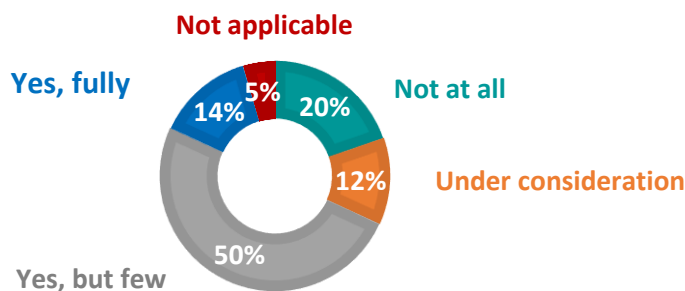


### Type of customers

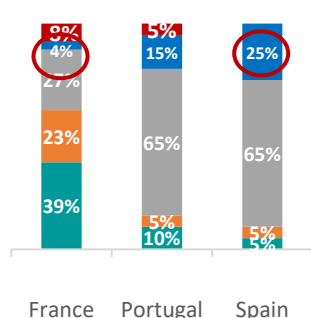


**Comments:** The level of business automation is considered low to medium (61%). Only 5% of the companies consider to have a high level of automation. This level is considered higher in Spain (10%). It also seems that companies working only in B to B are more equipped than others (9% versus 0%).

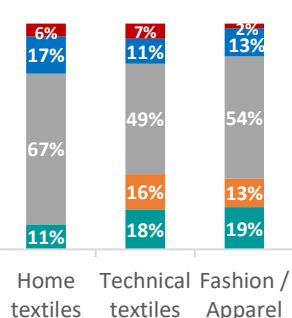
## 6- DO YOU USE DIGITAL SOLUTIONS (OTHER THAN AUTOMATION) TO INCREASE PRODUCTIVITY IN YOUR PRODUCTION PROCESSES (PREDICTIVE MAINTENANCE, DIGITALIZED INFORMATION, ...)?



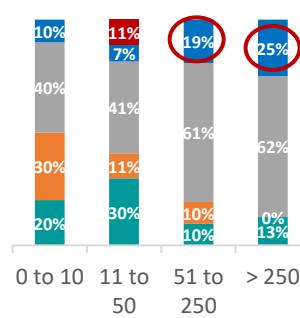
### Country



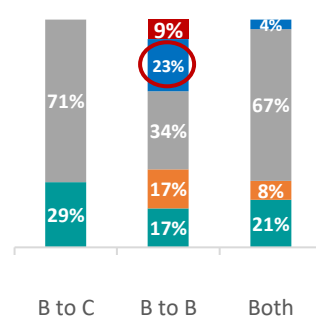
### Main market



### Company size

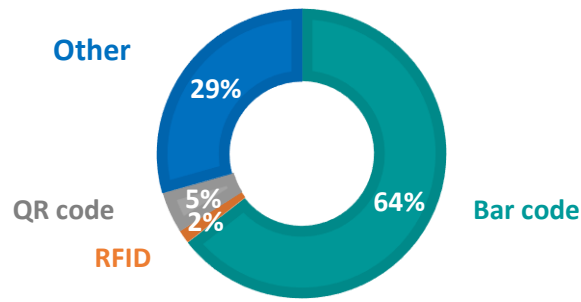


### Type of customers

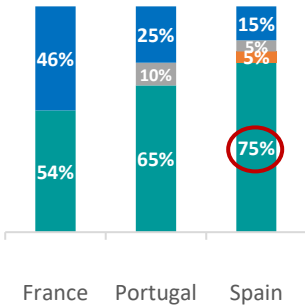


**Comments:** Only 14% of the companies declare to have implemented a maximum of digital solutions, other than automation, to increase their productivity; 50% declare to have done so but to a lesser extent and others are considering implementation (12%). Companies with more than 50 employees are more advanced on this subject (Medium company: 19% – Big company: 25%). In Spain, digital solutions are more deployed (25%) while in France, they are much less so (4%). Companies working in B to B are also much more advanced (B to B: 23% – B to C: 0% – Both: 4%).

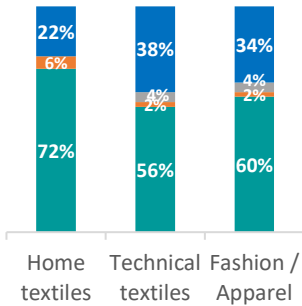
## 7- WHICH LOGISTIC SYSTEM USE YOUR COMPANY?



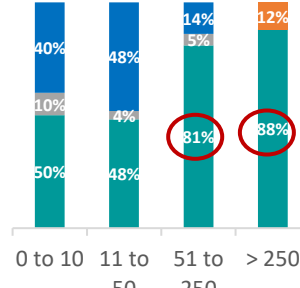
### Country



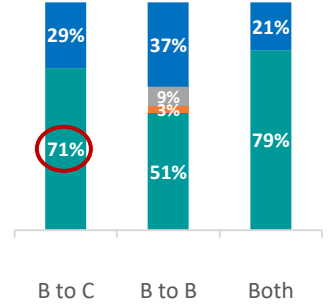
### Main market



### Company size

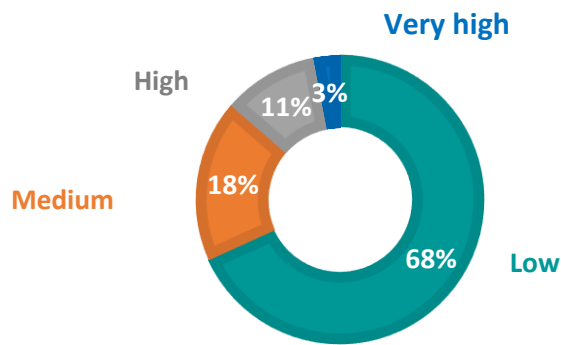


### Type of customers

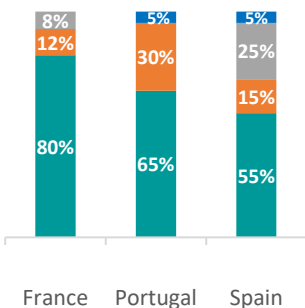


**Comments:** Digital coding systems (barcodes and QR codes) are widely used in logistics by 69% of companies. This trend is more important for Spanish companies (75%). These solutions are deployed more often depending on the size of the company (Medium company: 81% – Big company: 88%). Those working in B to C are also better equipped (71%).

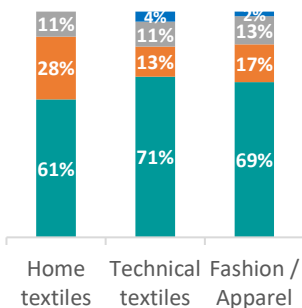
## 8- WHICH LEVEL OF AUTOMATIZATION HAS YOUR WAREHOUSE?



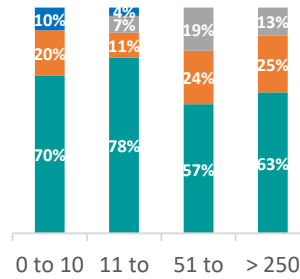
### Country



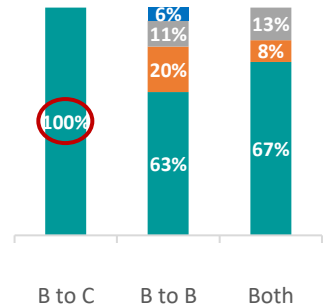
### Main market



### Company size



### Type of customers

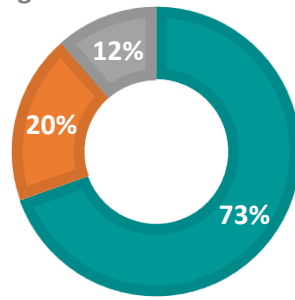


**Comments:** The level of warehouse automation is considered as low to medium by 86% of the companies. This level varies greatly depending on the country (France: 92% – Portugal: 95% – Spain: 70%). Surprisingly, not all the B-to-C companies surveyed consider themselves automated in this sector.

## 9- WHAT KIND OF PRODUCTION SYSTEM DOES YOUR COMPANY USE?

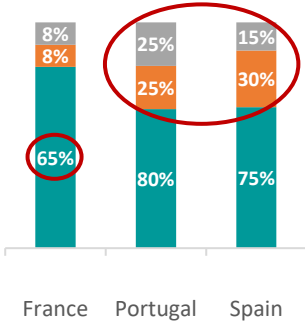
APS - Advanced Planning  
and Scheduling

MES - Manufacturing  
Execution Systems

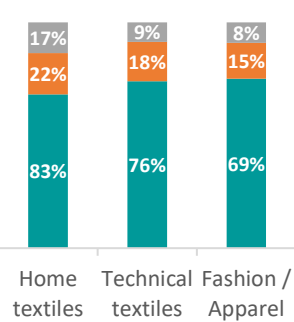


ERP - Enterprise  
Ressource Planning

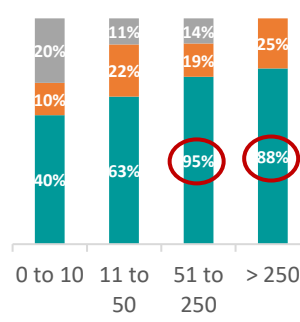
### Country



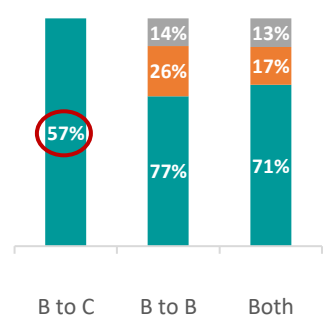
### Main market



### Company size

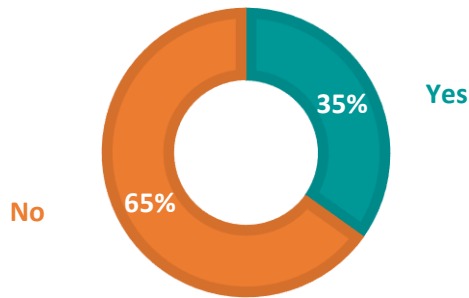


### Type of customers

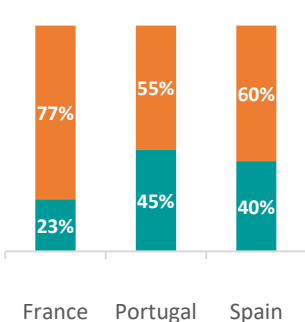


**Comments:** Digital production management tools such as ERP (Enterprise Resource Planning) are already used by 73% of companies, including a majority of companies with more than 50 employees (95% among Medium companies and 88% for Big companies). French companies are positioned below (65%). Conversely, digital production management tools such as MES (Manufacturing Execution Systems) and APS (Advanced Planning and Scheduling) are very little deployed (20% for the former and 12% for the latter). This deployment is more significant for Spanish and Portuguese companies as well as those working in B to B. B-to-C companies are the only ones to have deployed only one production system (ERP):

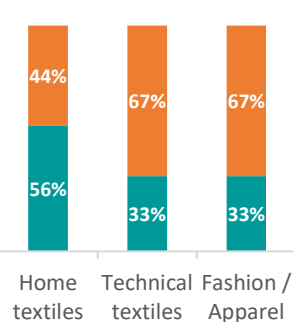
## 10- DO YOU COLLECT IN REAL TIME AND ANALYZE DATA FROM INDUSTRIAL TOOLS?



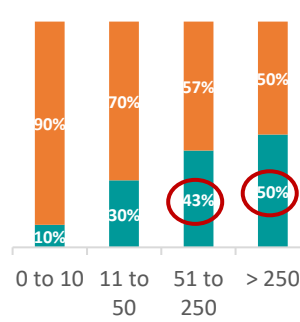
### Country



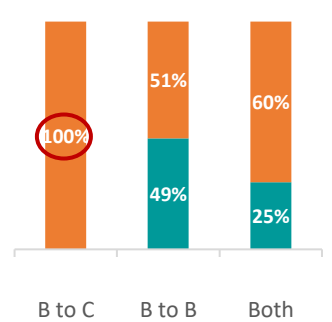
### Main market



### Company size



### Type of customers



**Comments:** Few companies (35%) collect and analyse machine data in real time. This increases with the size of the company (Medium company: 43% – Big company: 50%). French companies are the most lagging behind on this subject (23%). In the same way, not all B-to-C companies surveyed consider themselves automated in this sector. The Home textile sector shows a certain advance compared to other markets (56% against 33%).

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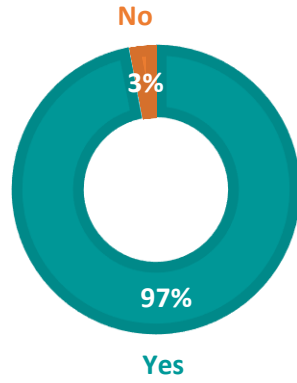
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**Digital maturity diagnosis**  
**Quantitative analysis**

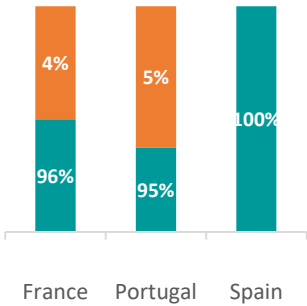
**MARKETING / BRANDING**



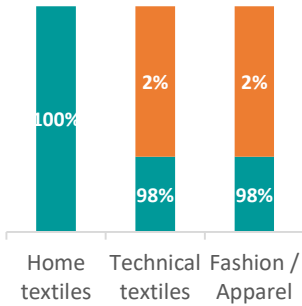
### 11- DOES YOUR COMPANY HAS ANY WEBSITE?



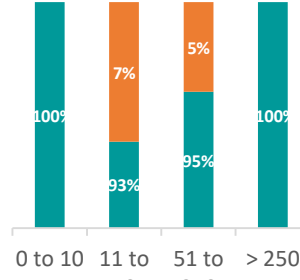
#### Country



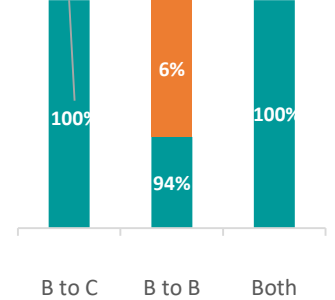
#### Main market



#### Company size

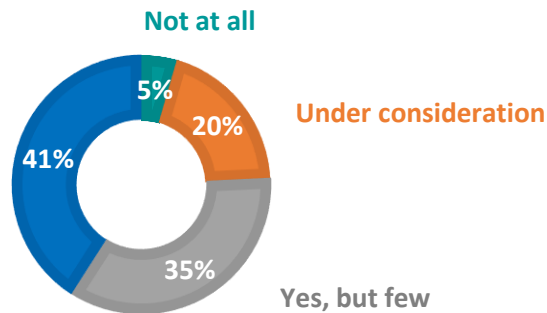


#### Type of customers

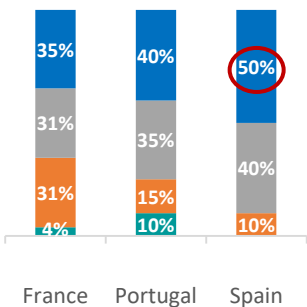


**Comments:** The fact of having a website (image or sale) has entered the standards of companies with a 97% ownership rate.

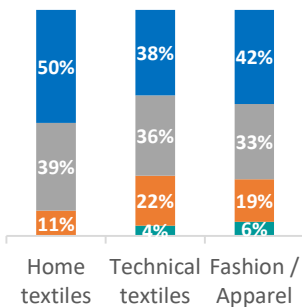
### 12- IF YES, IS YOUR WEBSITE REGULARLY UPDATED TO REFLECT YOUR NEWS AND THE EVOLUTION OF YOUR OFFERS?



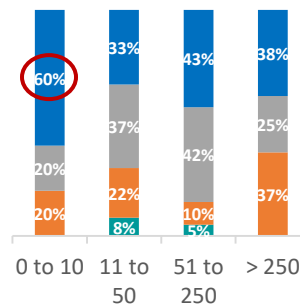
#### Country



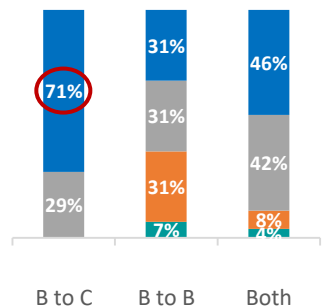
#### Main market



#### Company size

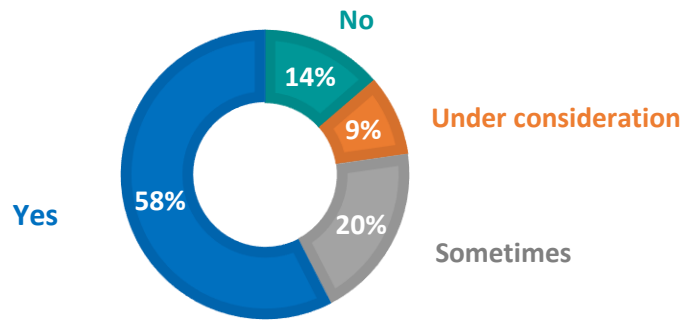


#### Type of customers

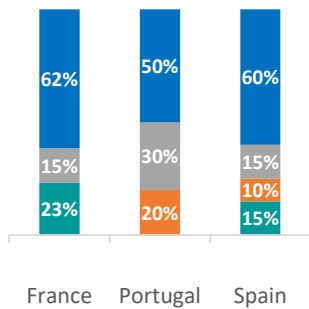


**Comments:** If the companies have all equipped themselves with a website (97%), they are on the other hand only 41% to update it regularly in order to display their news and the evolution of their offers, this rate climbs to 71% for the companies in B to C. MICRO companies are not to be outdone with an update rate of 60%. Spanish companies are the most advanced on this point (50%).

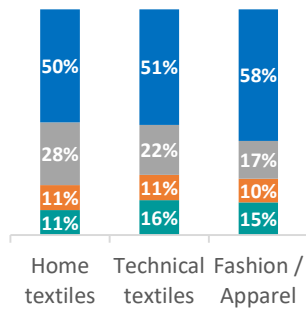
### 13- DO YOU COMMUNICATE VIA SOCIAL NETWORKS?



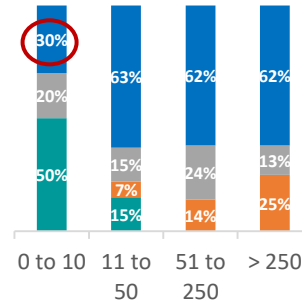
#### Country



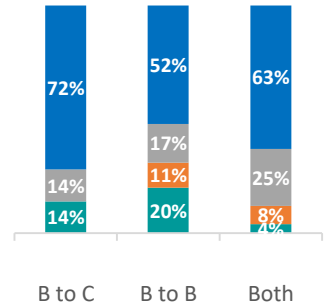
#### Main market



#### Company size

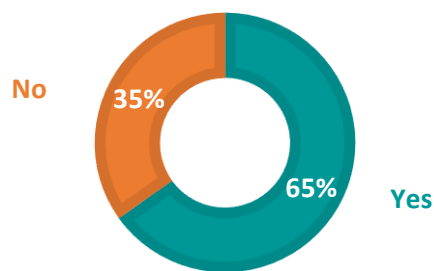


#### Type of customers

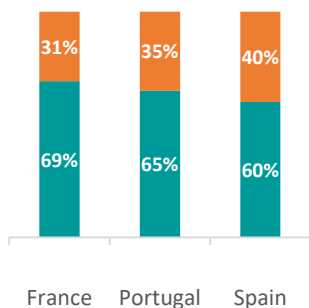


**Comments:** If the companies of the sector are a large majority (65%) to pay attention to their reputation on Internet (see next question), they are 78% to communicate via social networks, of which 20% "Sometimes". On the other hand, small companies (MICRO) are lagging behind on this subject since only 30% of them communicate regularly. In addition, 9% of companies have begun to reflect on this issue and could therefore communicate on social networks in the medium term. Note that B-to-C companies are the most converted to social networks.

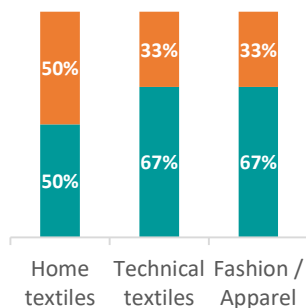
### 14- ARE YOU VIGILANT ABOUT THE WAY PEOPLE TALK ABOUT YOUR COMPANY ON THE INTERNET/ON SOCIAL NETWORKS?



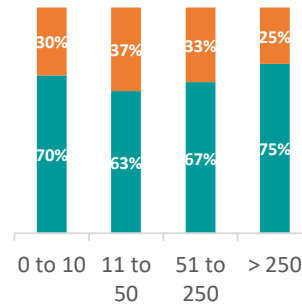
#### Country



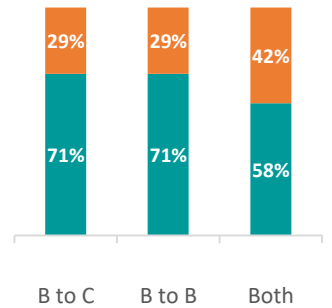
#### Main market



#### Company size

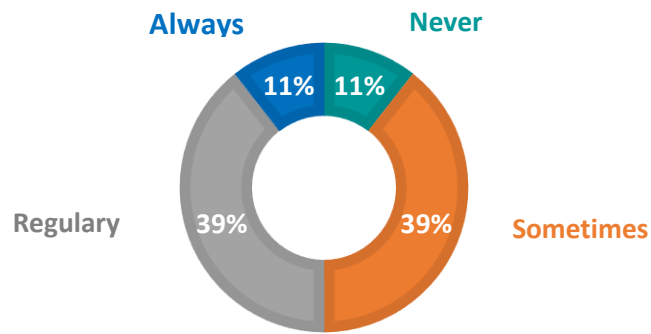


#### Type of customers

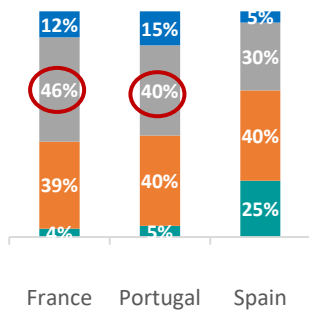


**Comments:** In recent years, Internet reputation has become an essential issue for companies in the sector, 65% of which are vigilant. There is also increased vigilance in companies with more than 50 employees (Medium companies and Big companies), which have more resources to devote to maintaining the company's good reputation on the Internet. However, the MICROS are not outdone since they are 70% to be vigilant about their image.

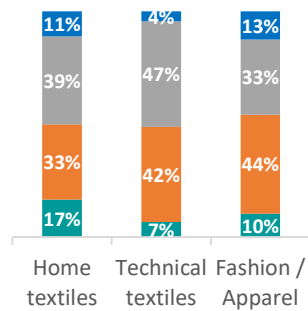
# 15- DO YOU MONITOR YOUR COMPETITORS' PRODUCTS/SERVICES ON THE WEB?



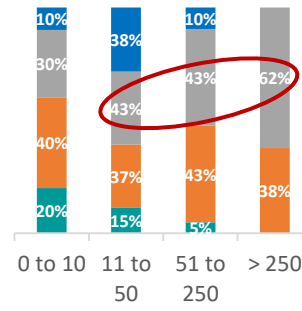
Country



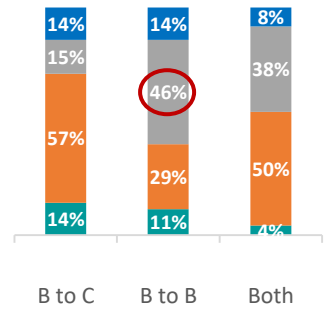
Main market



Company size



Type of customers



**Comments:** Only 50% of the companies declare to make a systematic or regular watch of their competitors on the web. Monitoring is more common among French and Portuguese companies, among companies with more than 10 employees and among B-to-B companies.

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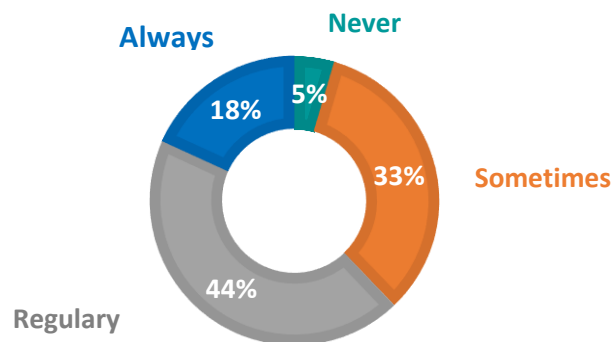
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**Digital maturity diagnosis**  
**Quantitative analysis**

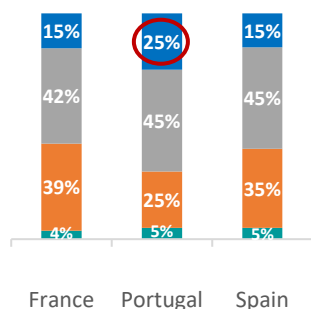
**SALES / CUSTOMERS RELATIONSHIP**



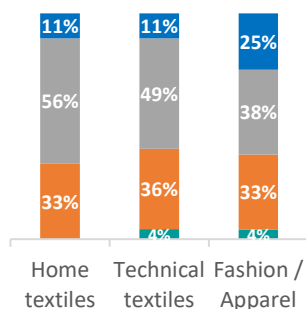
## 16- DO YOU USE DIGITAL IN YOUR CUSTOMER RELATIONSHIP?



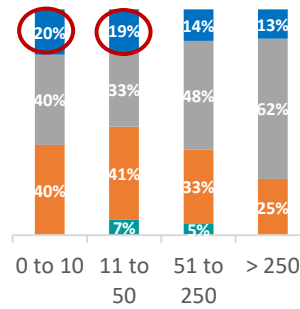
### Country



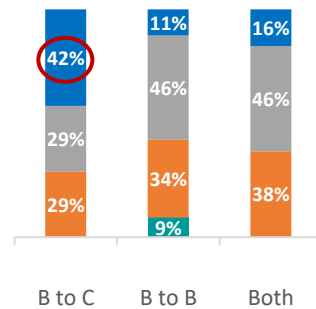
### Main market



### Company size

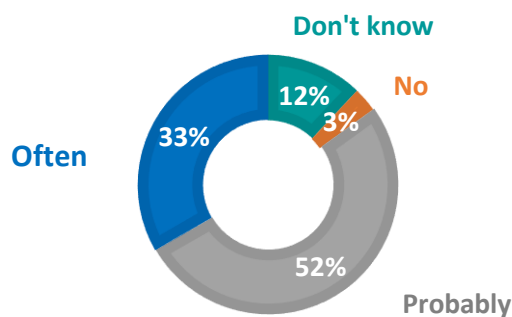


### Type of customers

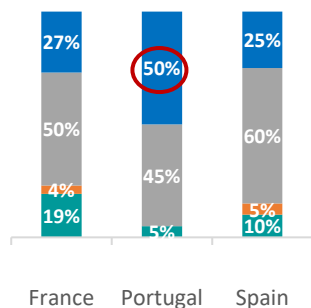


**Comments:** "Regularly" using digital technology in customer relations is still very slightly a minority (44%). It is systematic for 18% of companies and is more pronounced for Portuguese companies (25%). Similarly, small companies (MICRO: 20% and Small company: 19%) are more likely to use digital in their customer relations than larger companies (Medium company: 14% – Big company: 13%). Note that companies in B to C (42%) are more users than those in B to B (11%).

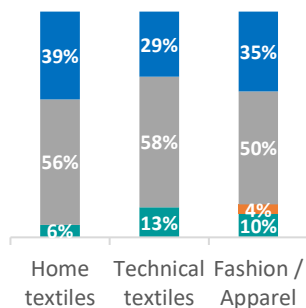
## 17- IN GENERAL, DO YOU THINK THAT THE USE OF DIGITAL TOOLS HAS IMPROVED YOUR CUSTOMER RELATIONSHIP?



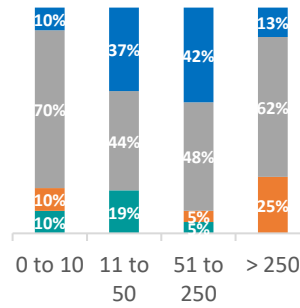
### Country



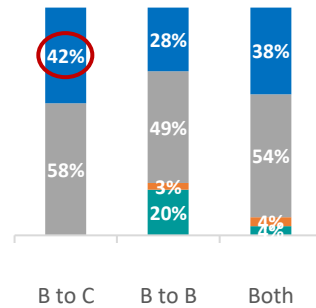
### Main market



### Company size

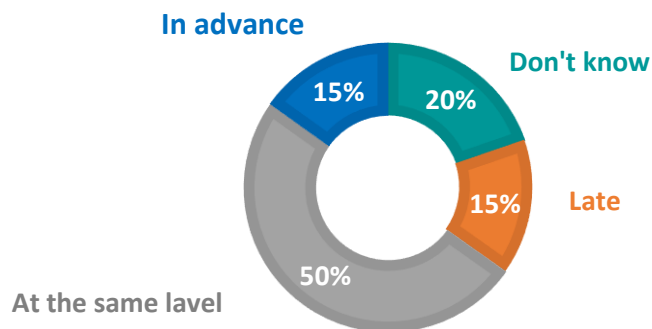


### Type of customers

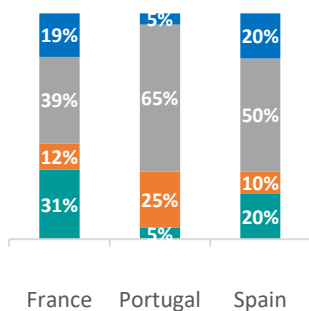


**Comments:** The impact of digital tools on customer relations is not always perceived, since only 33% of companies "Often" notice their positive impact, against 52% "Probably". Portuguese companies have a better perception of this impact since 50% of them "Often" notice their positive impact, against 27% for the French and 25% for the Spanish. The companies in B to C notice "Often" at 42% their positive impact, while those in B to B notice it only at 28%.

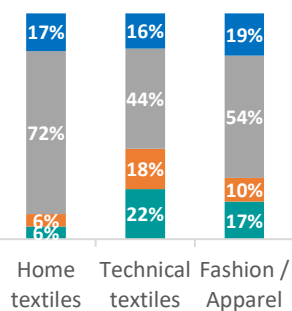
## 18- HOW DO YOU COMPARE WITH YOUR CUSTOMERS IN TERMS OF DIGITAL ADOPTION?



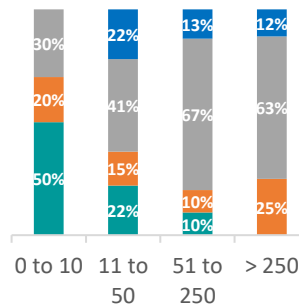
Country



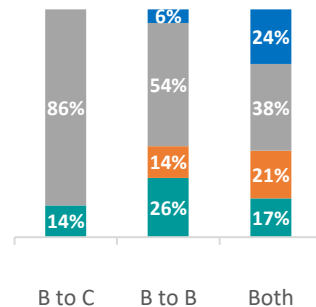
Main market



Company size

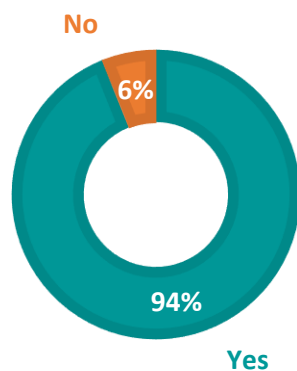


Type of customers

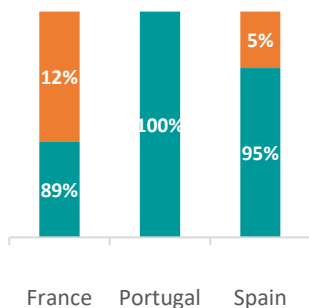


**Comments:** Few companies (15%) consider themselves "In advance" on their customers in terms of digital adoption: they are the same to consider themselves "Late" (15%), which is not in itself a problem in the sense that it can accelerate the conversion to digital. There is also a high rate of "Don't know" (20%) on this question. This high rate could be explained by making a link with question 16, where we noticed that the use of digital in customer relations was still in the minority. We can therefore assume that there is a lack of knowledge of the solutions used by customers.

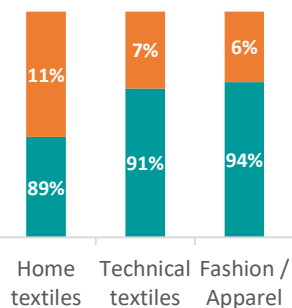
## 19 - ARE YOUR CUSTOMERS OPEN TO DIGITALIZATION?



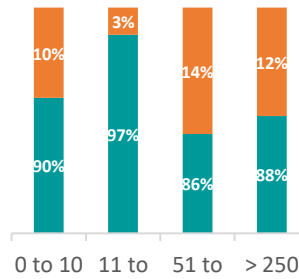
Country



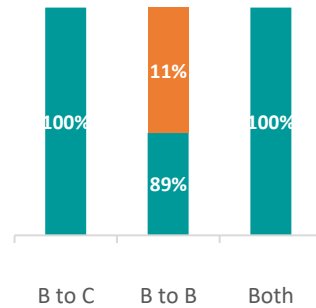
Main market



Company size

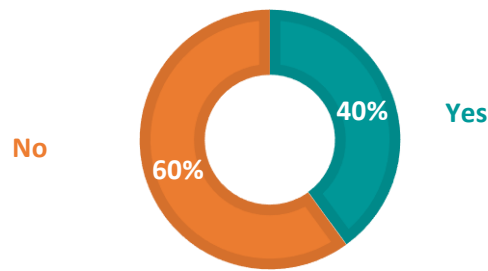


Type of customers

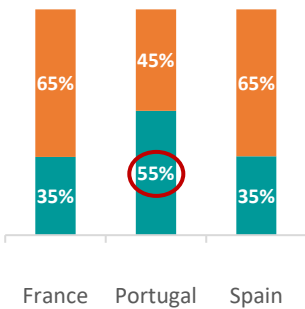


**Comments:** 94% of companies consider that their customers are open to digitalization: this may represent a factor in accelerating the digitalization of customer relations.

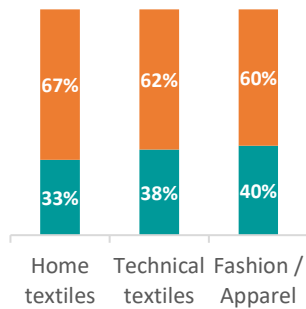
## 20 - DOES YOUR COMPANY HAS A CRM (CUSTOMER RELATIONSHIP MANAGEMENT) SYSTEM?



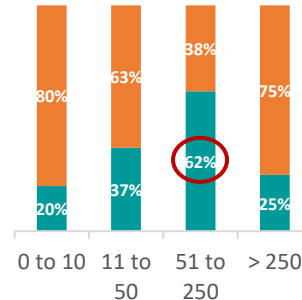
### Country



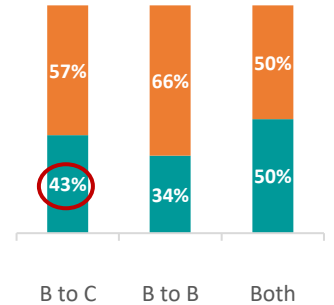
### Main market



### Company size



### Type of customers

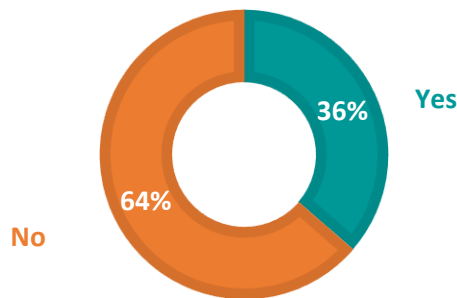


**Comments:** Digital tools for customer relationship management (CRM type) are already used by 40% of companies, including a majority of mid-sized companies (62% among Medium companies) and B-to-C companies (43%).

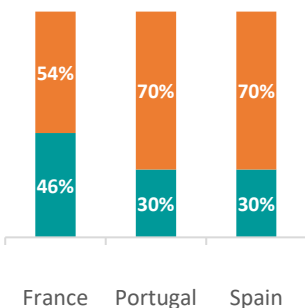
Conversely, the smallest companies, or those in B to B, are further behind on this issue.

French and Spanish companies lag behind in the use of this tool (35%) compared to Portuguese companies (55%).

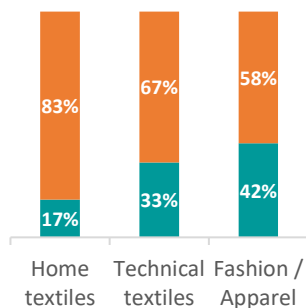
## 21- DO YOU HAVE E-COMMERCE?



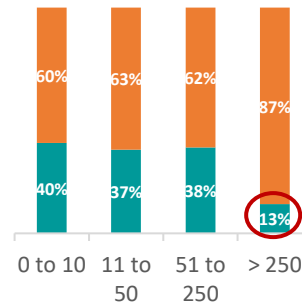
### Country



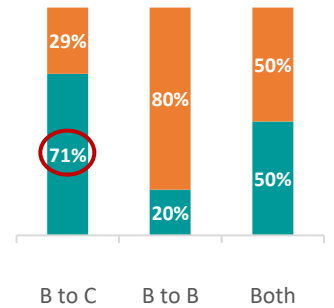
### Main market



### Company size

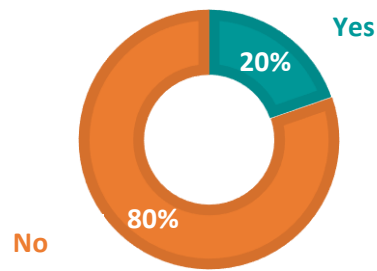


### Type of customers

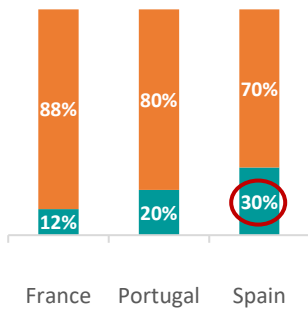


**Comments:** Only 36% of companies practice online commerce, a large majority of which are B-to-C companies (71%). Surprisingly, companies with more than 250 employees are the ones that use e-commerce the least (13%) while they are the ones that have the most means.

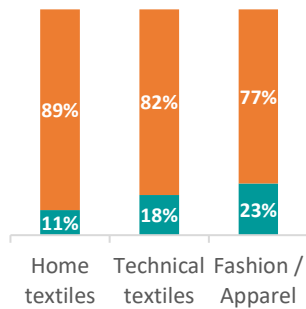
22-IS YOUR COMPANY PRESENT IN ANY MARKETPLACE (AMAZON, ALIBABA, PREMIÈRE VISION, ...)



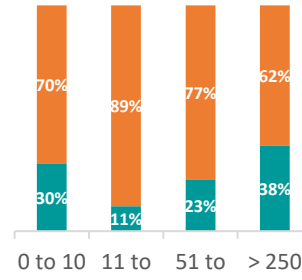
Country



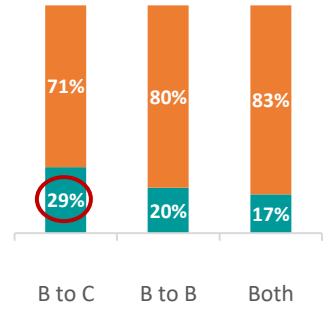
Main market



Company size



Type of customers



**Comments:** Very few companies (20%) are present on online marketplaces (Amazon, Alibaba, others). Spanish companies are the best represented at 30% as well as B-to-C companies (29%).

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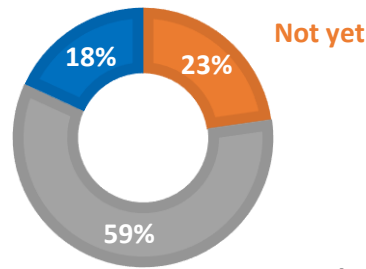
**Digital maturity diagnosis**  
**Quantitative analysis**

**HUMAN RESSOURCES**



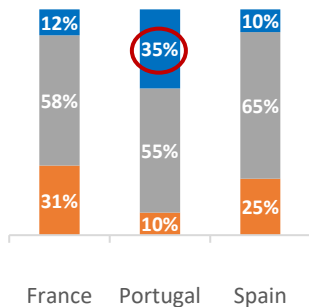
## 23- AS AN ENTREPRENEUR, DO YOU CONSIDER THAT YOU HAVE ALREADY APPROPRIATED DIGITAL TOOLS?

Yes, fully

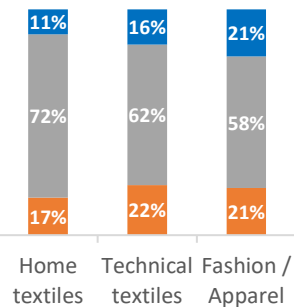


Yes, partly

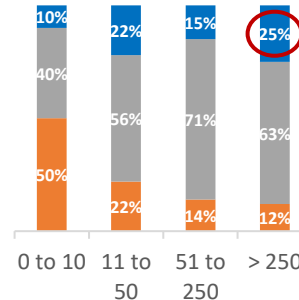
### Country



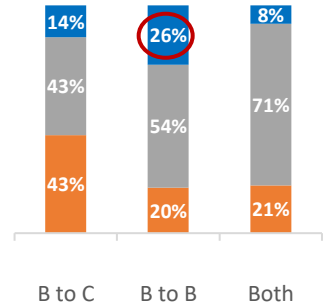
### Main market



### Company size

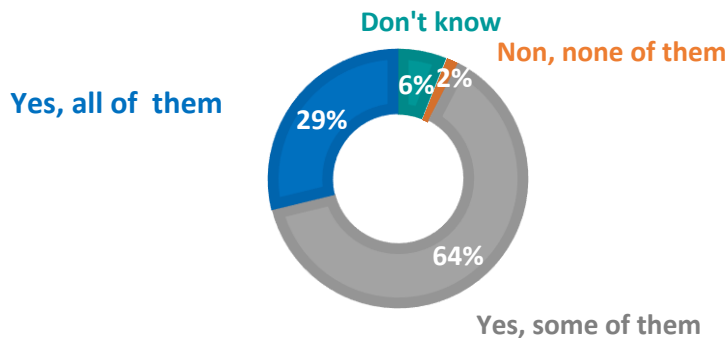


### Type of customers

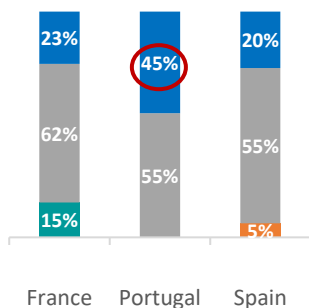


**Comments:** Initiators and drivers of the digital transformation of their companies, only 18% of company managers have "Fully" appropriated digital tools, compared to 59% "Partly" and 23% "Not yet". Portuguese company managers are the ones who say they have appropriated digital tools the most (35%). There is a better appropriation of digital tools by company managers of large companies (Big company: 25%) than by those of small companies (MICRO: 10%). Those of B-to-B companies also have a better rate of appropriation.

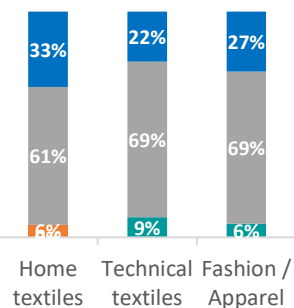
## 24- DO YOU CONSIDER THAT YOUR MANAGEMENT IS AWARE OF THE OPPORTUNITIES OFFERED BY DIGITAL TECHNOLOGY?



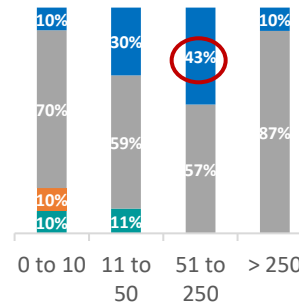
### Country



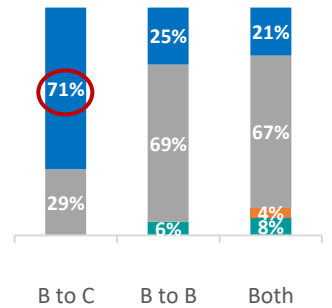
### Main market



### Company size

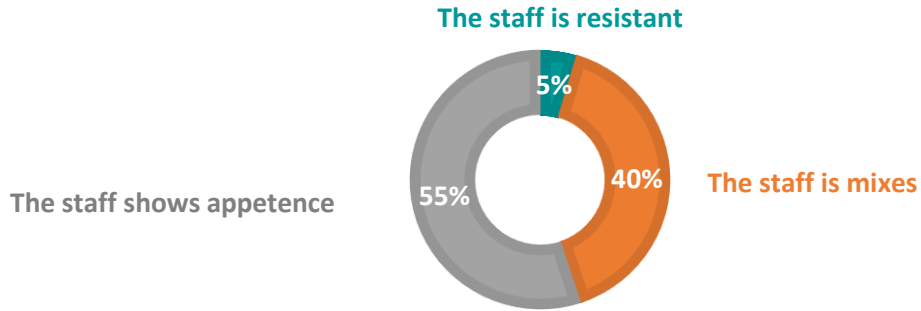


### Type of customers

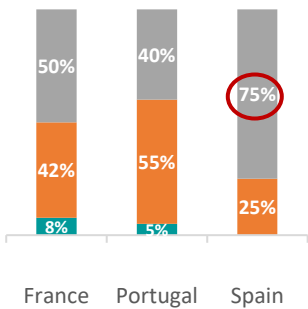


**Comments:** Only 29% of company managers are fully aware of the opportunities offered by digital technology, while 64% are only partially aware of it. This is increasing for Portuguese business managers (45%), for B-to-C companies (71%) and for Medium companies (43%).

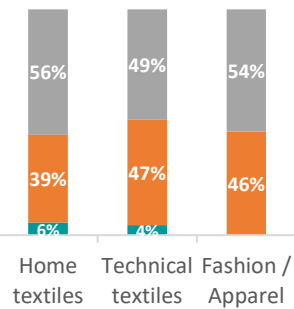
## 25- WHAT IS YOUR STAFF'S ATTITUDE TOWARDS ACCEPTING CHANGE THROUGH DIGITAL TECHNOLOGY ADOPTION?



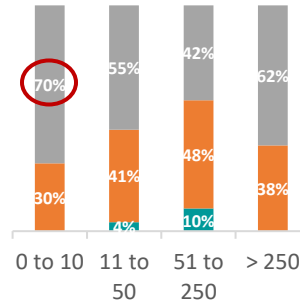
### Country



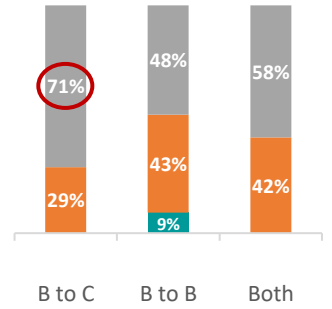
### Main market



### Company size

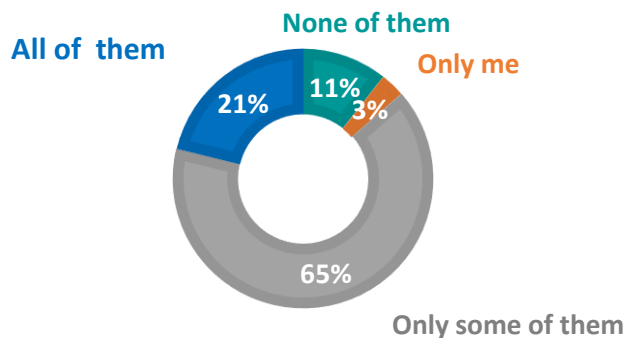


### Type of customers

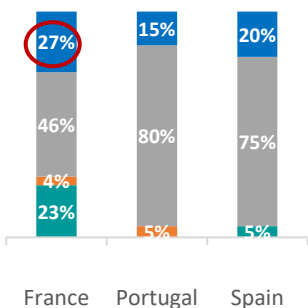


**Comments:** Digital appetite is not completely natural for all employees and in all companies: only slightly more than half of them (55%) have a team with a real interest in digital, compared to 40% in which the team is mitigated. This interest is greater for employees in Spanish companies (75%) and for those in B-to-C companies. A higher appetite is also noticeable among MICROs (70%).

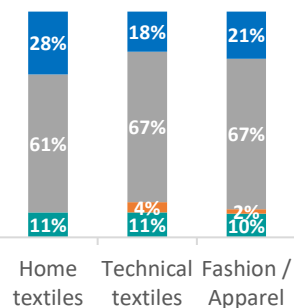
## 26- ARE YOUR EMPLOYEES EQUIPPED TO WORK IN REAL TIME AND IN MOBILITY (SMARTPHONES, TABLETS, COLLABORATIVE SPACES)?



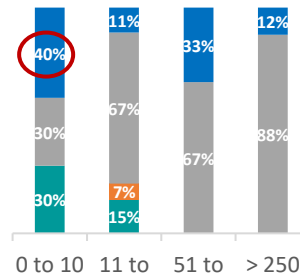
### Country



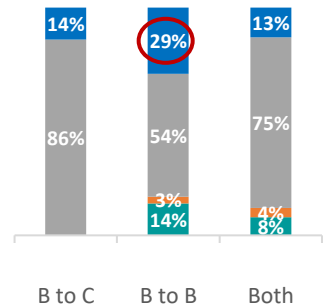
### Main market



### Company size

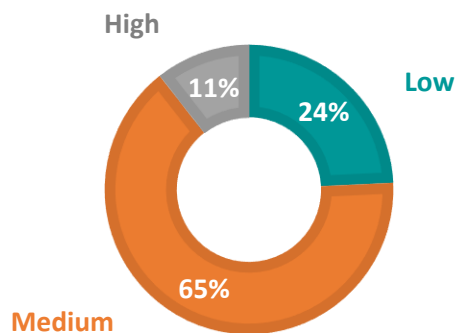


### Type of customers

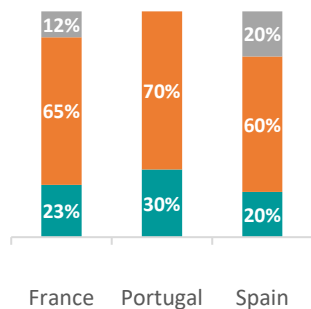


**Comments:** Digital equipment for working on the move (smartphones, tablets, collaborative spaces) is becoming more widely available, even though only 65% of companies have some employees equipped with it, compared to 21% of companies that have equipped all their employees. The rate of equipping all employees is the highest for French companies (27%). MICRO (40%) and B-to-B (29%) companies are also better equipped.

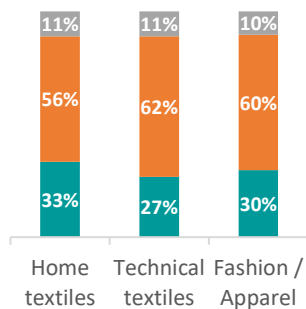
## 27 - RATE THE STAFF DIGITAL SKILLS IN YOUR COMPANY?



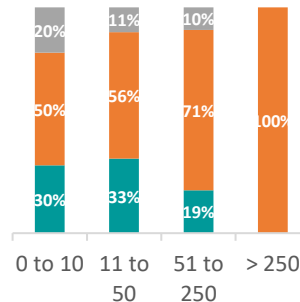
### Country



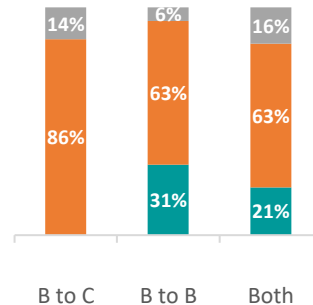
### Main market



### Company size

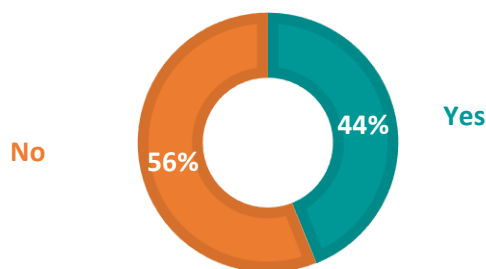


### Type of customers

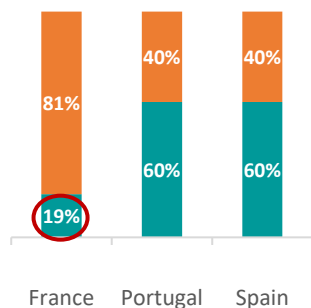


**Comments:** 89% of the employees of companies in the sector are considered "Low" to "Medium" in terms of digitalization skills.

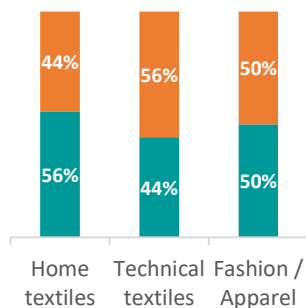
## 28- HAVE YOUR EMPLOYEES RECENTLY RECEIVED TRAINING ON THE USES OR TOOLS OF DIGITAL TECHNOLOGY?



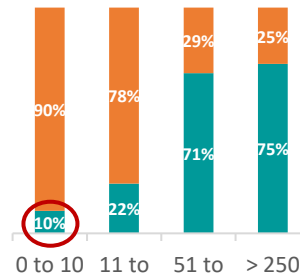
### Country



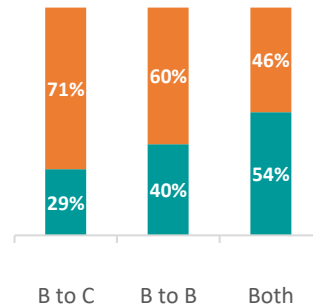
### Main market



### Company size

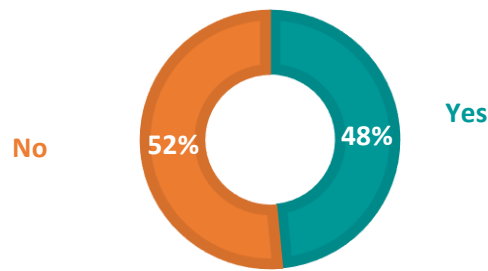


### Type of customers

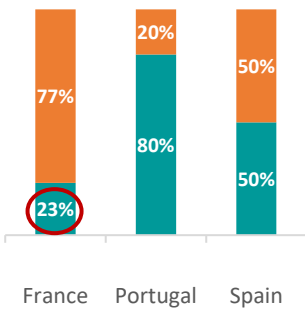


**Comments:** Training around the uses or tools of digital technology can still be very widely developed, with only 44% having used it recently, with significant differences according to company size (Medium company: 71% – Big company: 75% against 10% for MICROs) and country (only 19% for France, while Spain and Portugal rise to 60%).

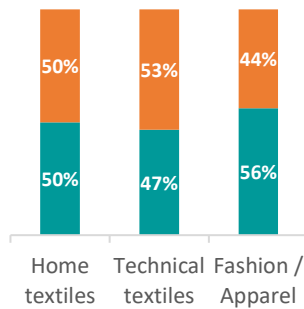
29- DURING YOUR LAST RECRUITMENTS, DID YOU SPECIFY CERTAIN SKILLS RELATED TO DIGITAL TECHNOLOGIES IN YOUR ADVERTISEMENT?



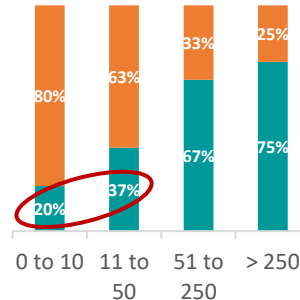
Country



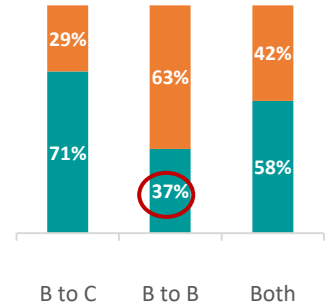
Main market



Company size

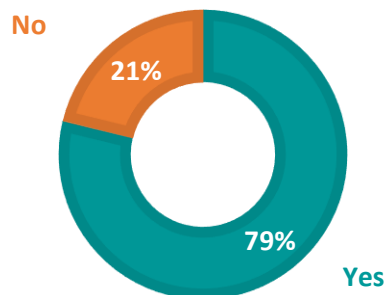


Type of customers

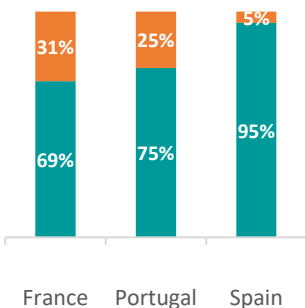


**Comments:** Only 48% of companies specify the skills related to digital technologies that are essential for deploying digital technology in companies when recruiting. This rate is much lower for French companies (23%), for B-to-B companies (37%) and for small companies (MICRO: 20% – Small company: 37%).

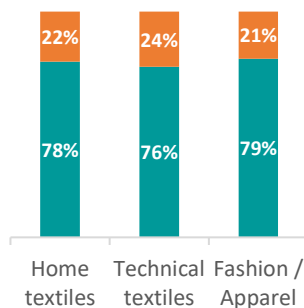
30- DO YOU HAVE IN-HOUSE SKILLS TO PERFORM DATA ANALYSIS?



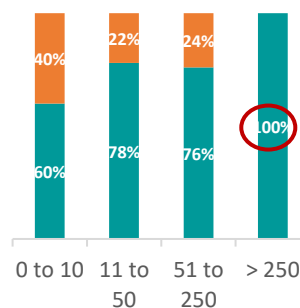
Country



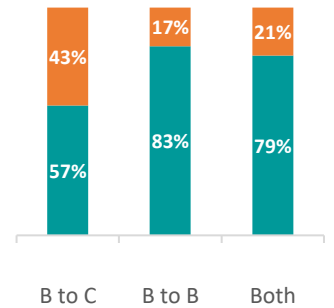
Main market



Company size

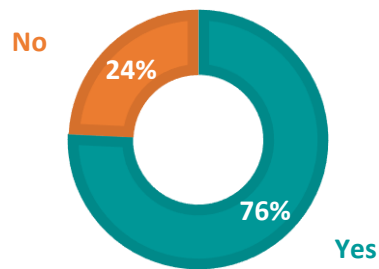


Type of customers

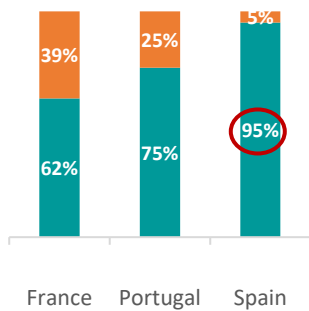


**Comments:** Data analysis is deemed to be mastered by companies, 79% of them indicate that they have the skills in-house; this is all the more true when the company has a large workforce (Big company: 100%). This is especially true if the company has a large workforce (Big company: 100%). French companies indicate that 69% of them have the skills to conduct data analysis, while 95% of Spanish companies indicate that they do.

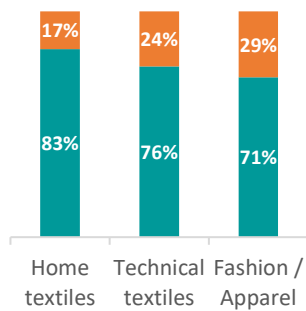
### 31- DO ALL YOUR EMPLOYEES HAVE DIGITAL ACCESS TO THE DATA THEY NEED, IN THE RIGHT PLACE, AT THE RIGHT TIME?



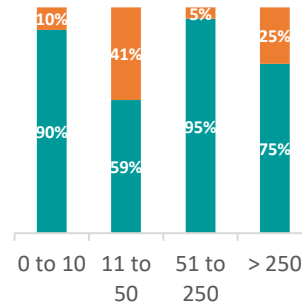
#### Country



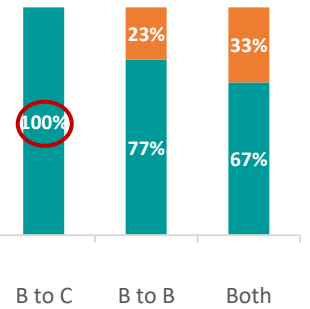
#### Main market



#### Company size



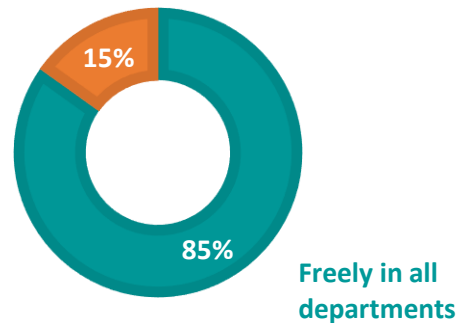
#### Type of customers



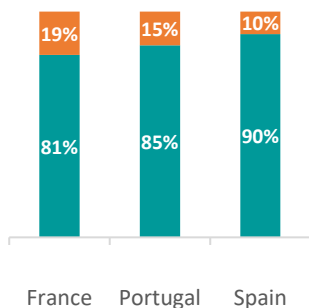
**Comments:** The data mastered by the companies is considered easily available and accessible to users via digital access at 76%. Spanish companies stand out positively with 95% access to data while French companies only have 62%. The B-to-C companies show a 100% availability and accessibility rate of the data.

### 32- HOW DOES DATA FLOW IN YOUR COMPANY?

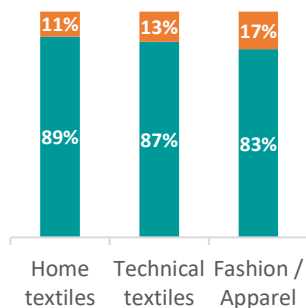
Siled and very difficult to obtain



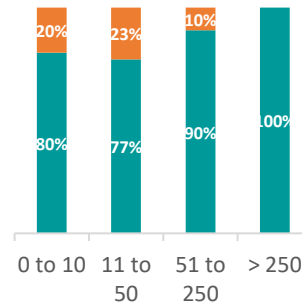
#### Country



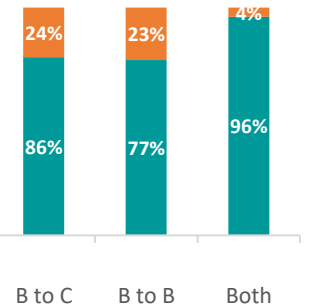
#### Main market



#### Company size



#### Type of customers



**Comments:** Data controlled by companies circulates easily for users, in all departments, for 85% of companies.

Interreg SUDOE

SOE3/P2/E0866

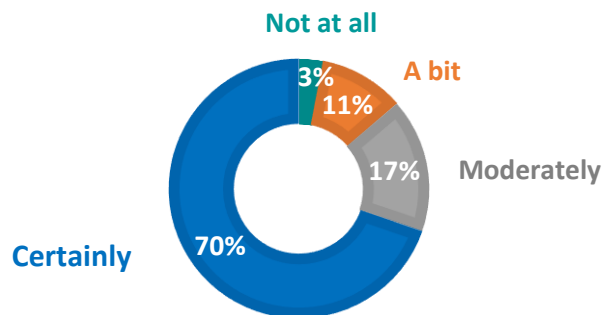
GT1.A1.2

**Digital maturity diagnosis  
Quantitative analysis**

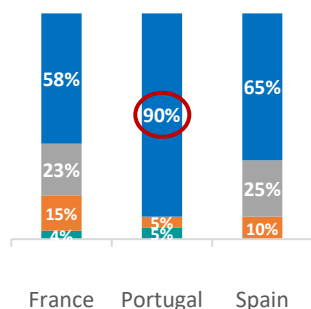
**STRATEGIC DEVELOPMENTS**



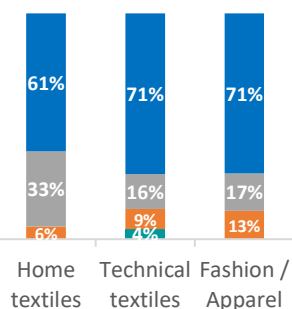
### 33- IN YOUR OPINION, IS DIGITAL TECHNOLOGY A FACTOR OF POSITIVE TRANSFORMATIONS WITHIN YOUR COMPANY?



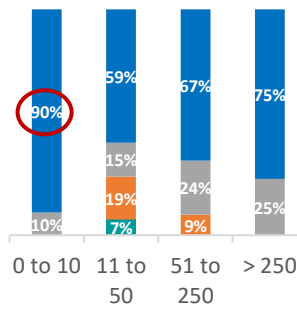
#### Country



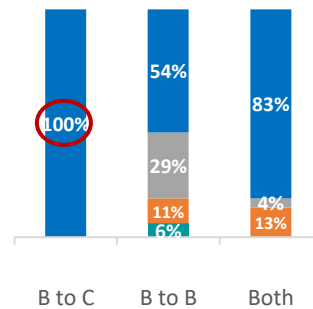
#### Main market



#### Company size



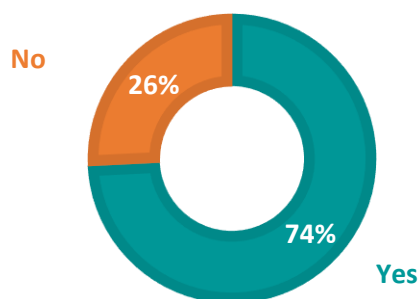
#### Type of customers



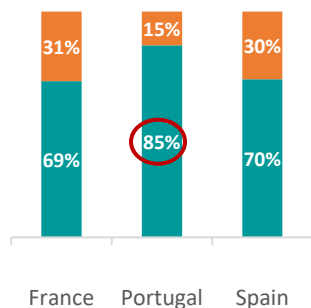
**Comments:** The impact of digital technology in general is considered very positive in companies since 70% of them consider it "Certainly" as a factor of positive transformations.

This perception is more pronounced in Portuguese companies (90%), in very small companies (MICRO: 90%) and in B-to-C companies (100%).

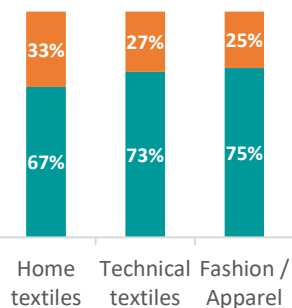
### 34- ARE THE COMPANY DEVELOPMENT TIED TO DIGITALIZATION PROGRESS?



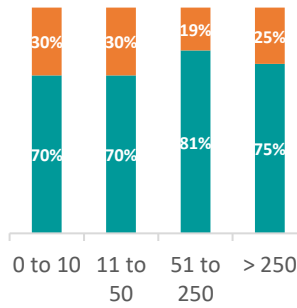
#### Country



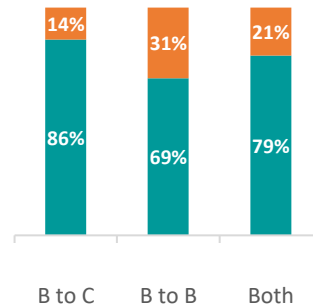
#### Main market



#### Company size

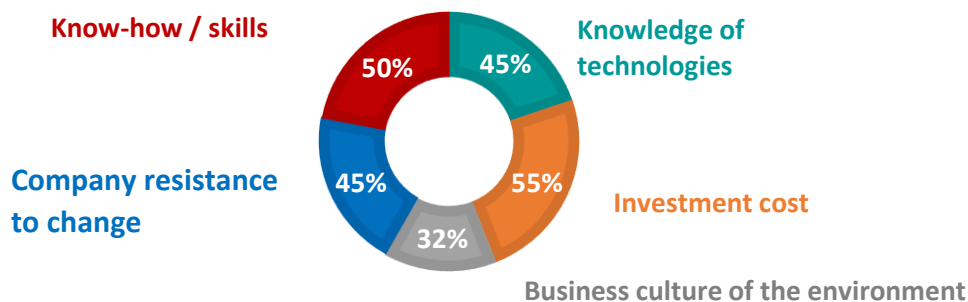


#### Type of customers

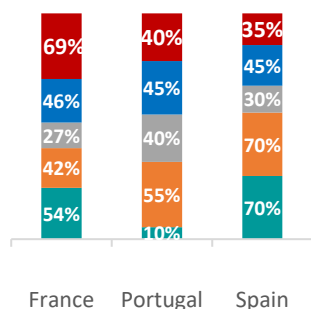


**Comments:** 74% of managers make a link between the development of their companies and the progress made in digital technology. This link is stronger for Portuguese managers (85%) and weaker for French managers (69%).

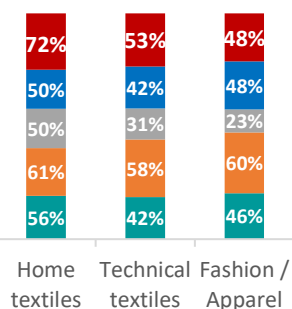
### 35- IN YOUR OPINION WHICH IS THE MOST IMPORTANT BARRIER THAT COMPANIES HAVE TO INTEGRATE THE DIGITALIZATION?



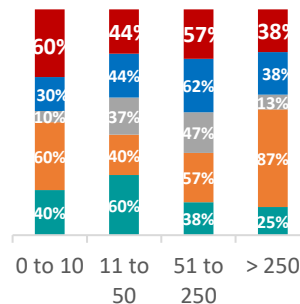
Country



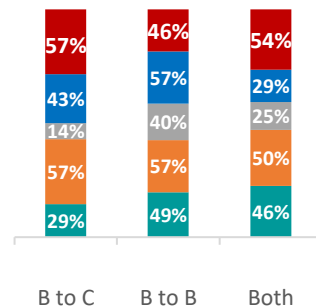
Main market



Company size

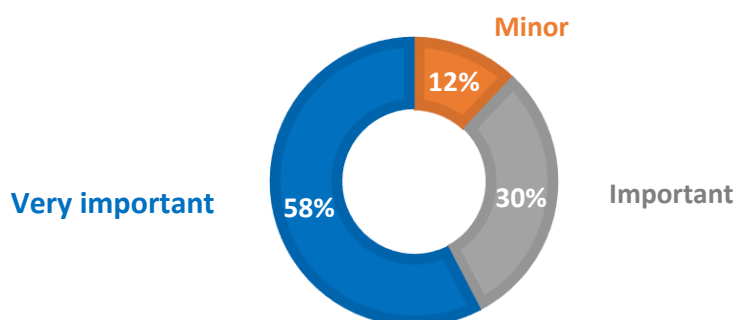


Type of customers

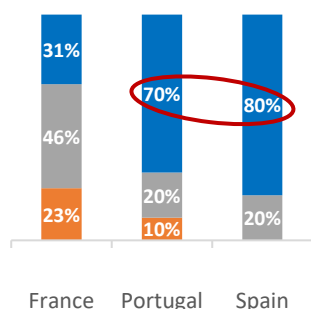


**Comments:** The two main obstacles to digital development most cited by companies are "Investment cost" and "Know-how / skills". However, no correlation related to country, company size or market could be identified.

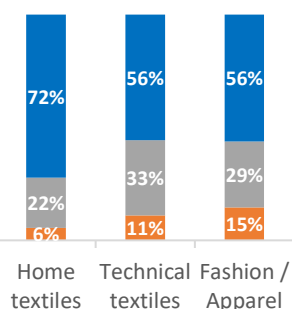
### 36 - DO YOU CONSIDER CYBERSECURITY ISSUES TO BE IMPORTANT FOR YOUR COMPANY?



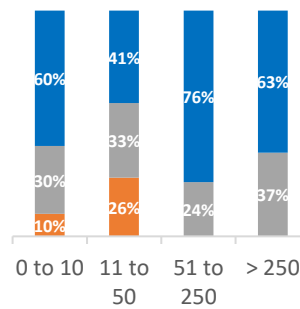
Country



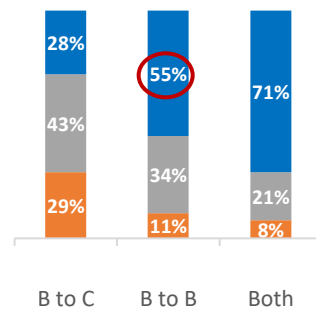
Main market



Company size

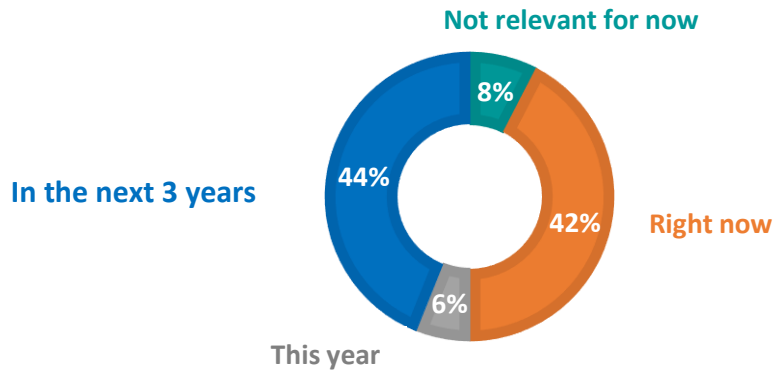


Type of customers

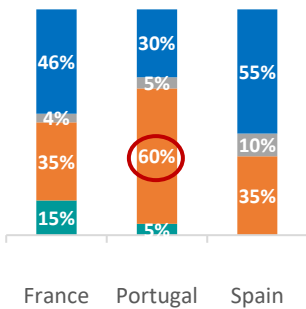


**Comments:** Cyber security issues are not taken lightly, with 88% of companies considering these issues to be important, including 58% who consider them to be "Very important": a special focus that can be explained by the international competition faced by companies in the sector, particularly as well as the new risks linked to data loss or theft.

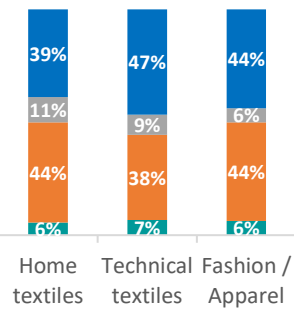
### 37- FOR YOU, THE DIGITAL TRANSFORMATION OF YOUR COMPANY IS:



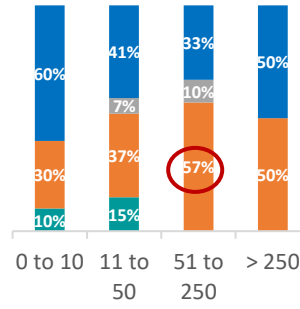
#### Country



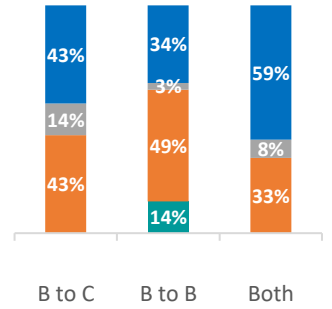
#### Main market



#### Company size

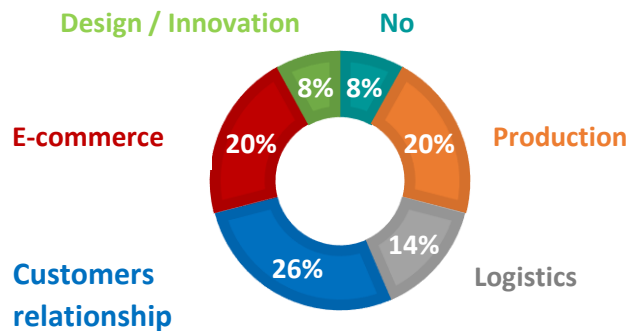


#### Type of customers

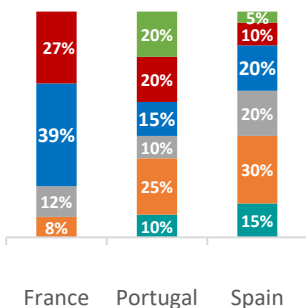


**Comments:** Digital transformation is a very short-term issue for only 42% of companies ("Right now"), a short-term issue for 6% of them and a medium-term issue for 44% ("In the next 3 years"), with increased awareness in medium-sized companies (MEDIUM company: 57%) and for Portuguese companies (60%).

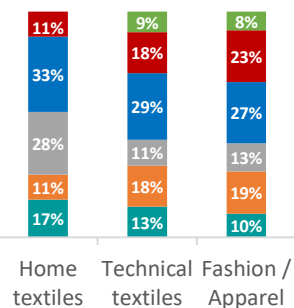
### 38- DO YOU HAVE DIGITAL PROJECTS IN YOUR COMPANY AND WHAT ARE THE NEXT STEPS IN YOUR COMPANY?



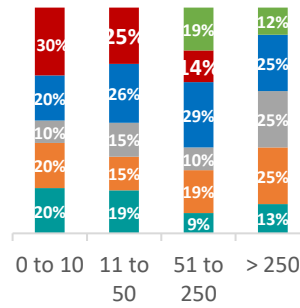
#### Country



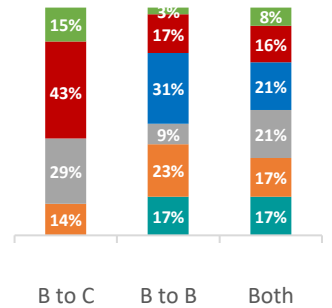
#### Main market



#### Company size

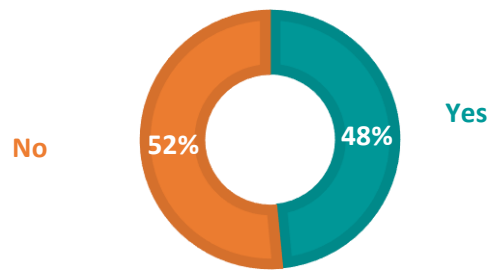


#### Type of customers

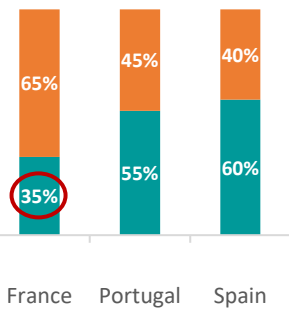


**Comments:** The projects around digital are oriented towards customers with 26% of projects in the sectors of "Customers relationship" and 20% of "E-commerce". 20% of the projects are oriented towards "Production". The results obtained for this question can be particularly interesting to exploit for the organization of the different workshops since they highlight the interests and next steps of the companies for the different sectors and countries.

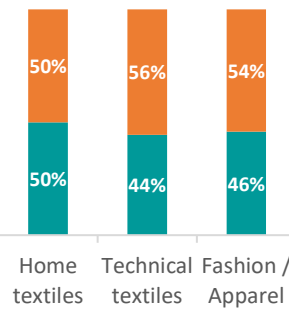
### 39 - HAVE YOU DEVELOPED OR ARE PREPARING A ROADMAP FOR YOUR DIGITAL TRANSFORMATION?



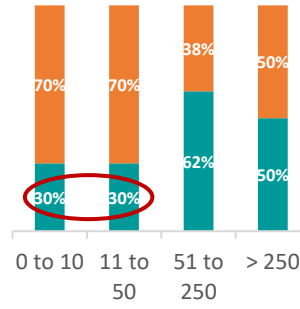
#### Country



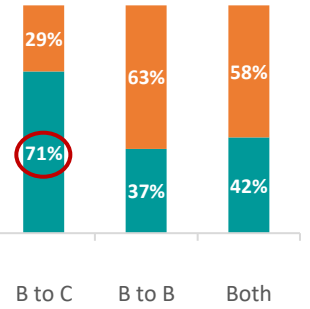
#### Main market



#### Company size

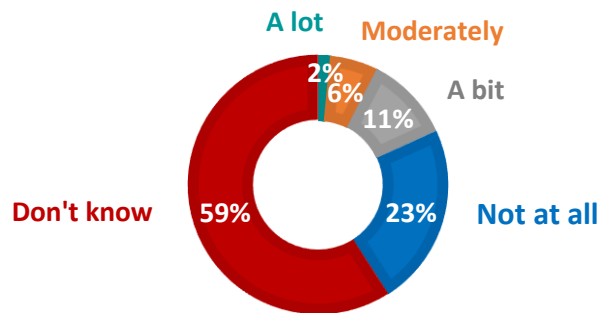


#### Type of customers

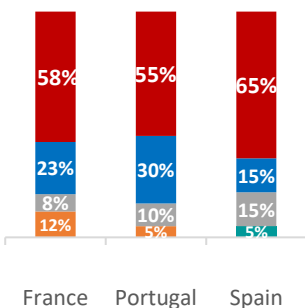


**Comments:** Digital transformation issues still need to infuse leaders since only 48% of them have established a roadmap on these subjects. France is lagging behind with 35% of managers who have built their roadmap against 55% of Portuguese managers and 60% of Spanish managers. Managers of smaller companies (< 50 employees) need to think about their digital transformation roadmap as only 30% have done so. On the other hand, 71% of the managers of B-to-C companies have already done so.

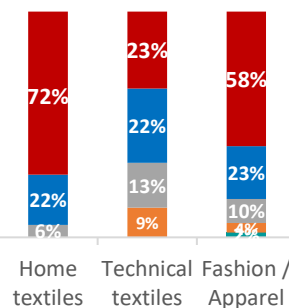
### 40- HAVE ANY OF YOUR COMPETITORS GOT AHEAD IN THEIR BUSINESS THANKS TO DIGITAL TECHNOLOGY?



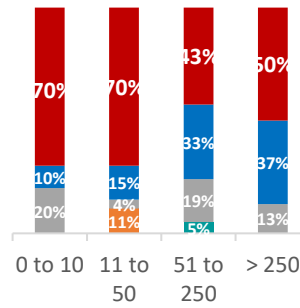
#### Country



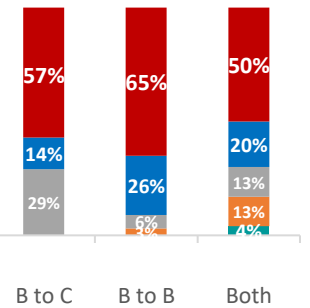
#### Main market



#### Company size

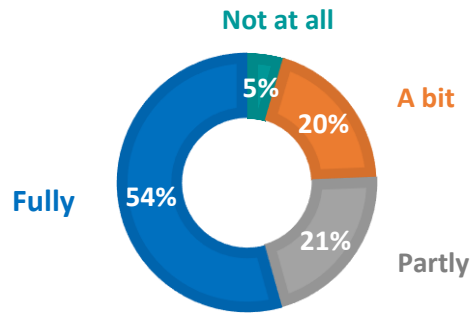


#### Type of customers

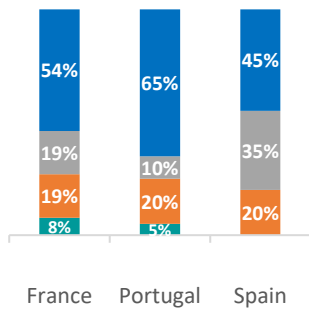


**Comments:** Digital is not always seen as a major means of differentiation: for 23% of companies, digital has "Not at all" allowed one of their competitors to get ahead in their business, and 59% have not identified it. However, we can relate the results of this question to those of question 15, which highlighted a lack of marketing intelligence about the competition. This lack of intelligence could explain why companies are not aware of what their competitors are doing.

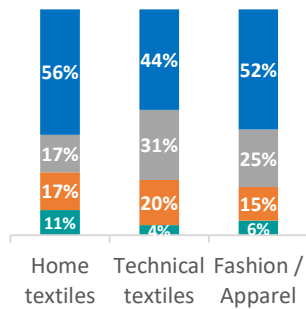
**41- DO YOU CONSIDER DIGITAL TO BE A FACTOR IN THE INNOVATION OF YOUR PROCESS TO “PRODUCTS AND SERVICES”?**



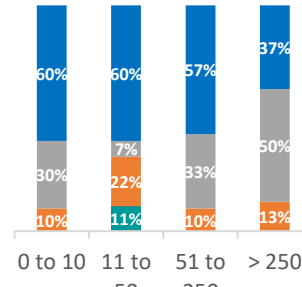
**Country**



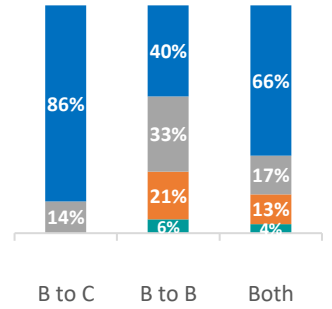
**Main market**



**Company size**

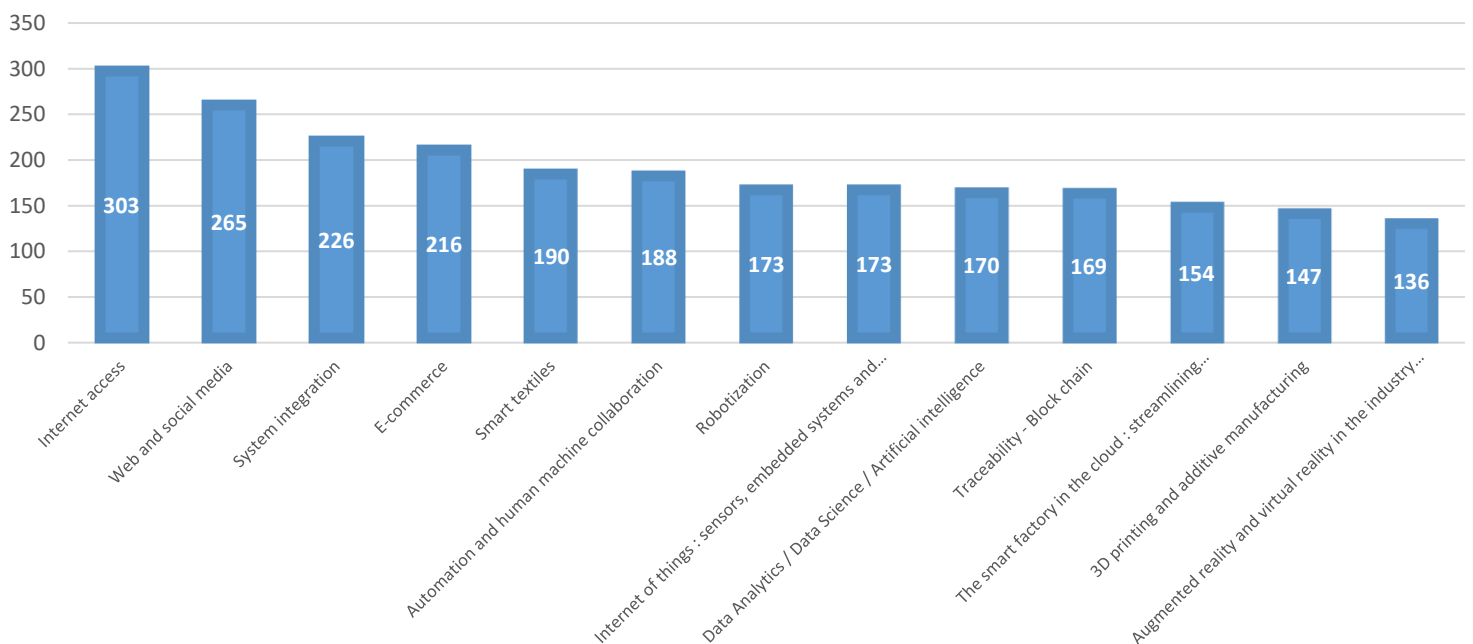


**Type of customers**

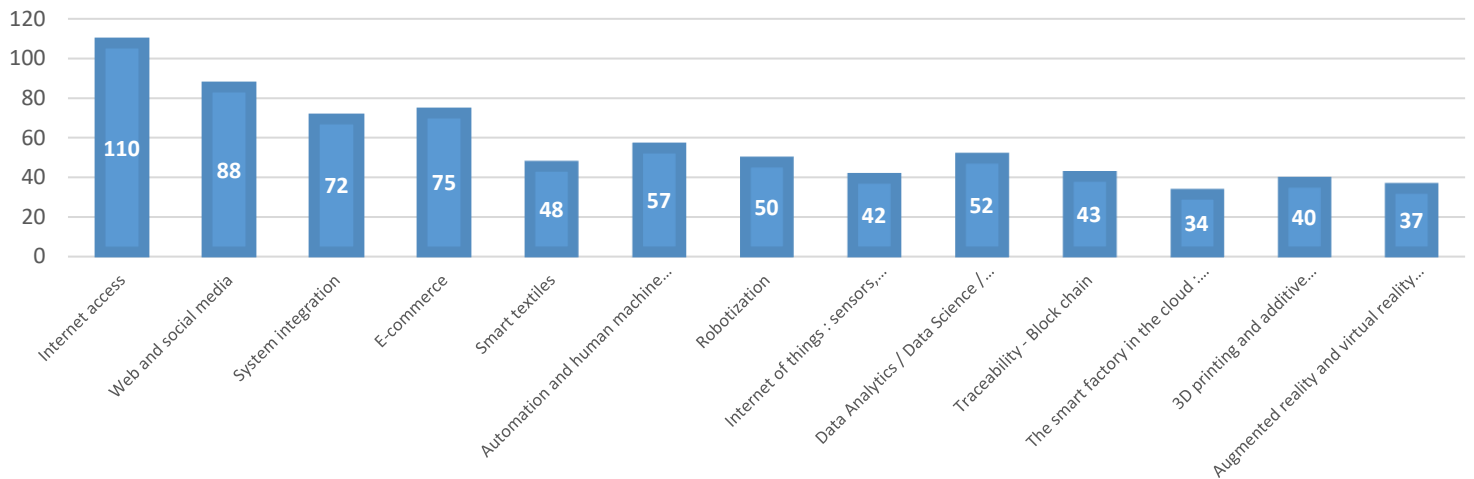


**Comments:** Digital is "Fully" considered as a factor in innovation by 54% of respondents, 21% "Partly", 20% "A bit" and 5% "Not at all", indicating a relatively strong impact of digital on product/service innovation.

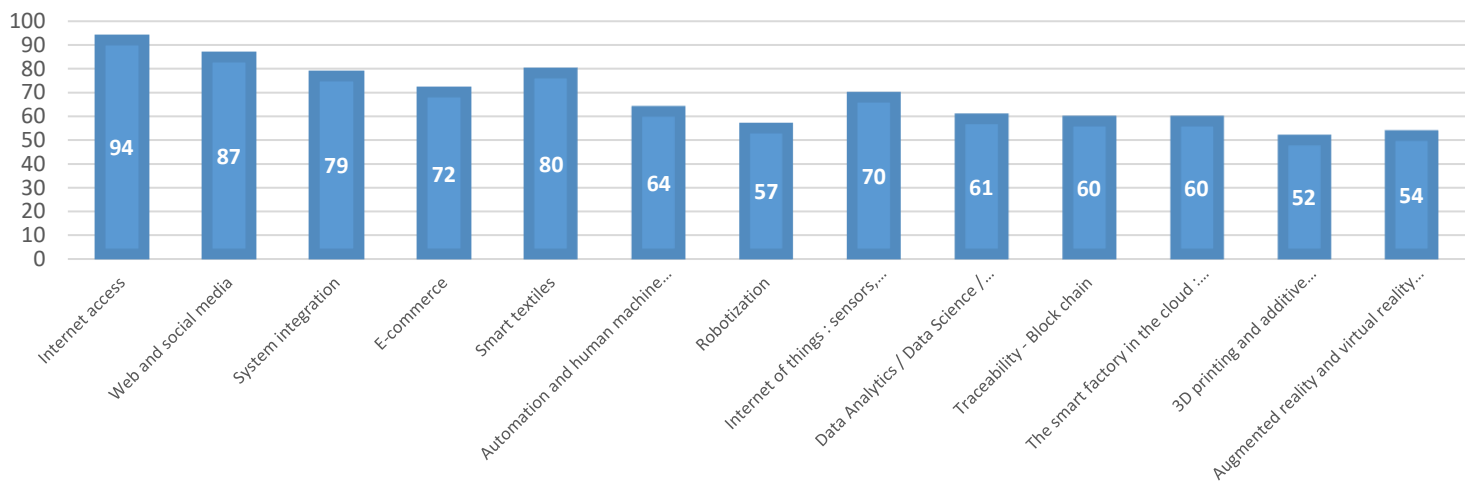
**42- DEGREE OF KNOWLEDGE OF THESE AREAS OF DIGITALIZATION (FROM THE BEST KNOWN TO THE LEAST KNOWN) GLOBAL**



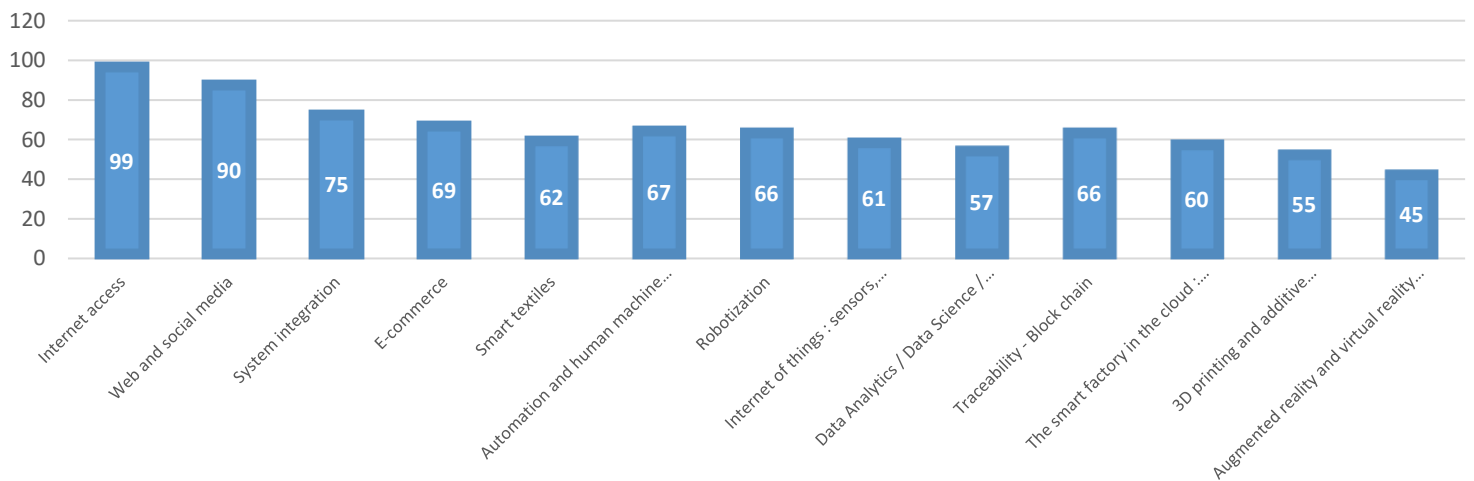
**DEGREE OF KNOWLEDGE OF THESE AREAS OF DIGITALIZATION (FROM THE BEST KNOWN TO THE LEAST KNOWN)**  
**FRANCE**



**DEGREE OF KNOWLEDGE OF THESE AREAS OF DIGITALIZATION (FROM THE BEST KNOWN TO THE LEAST KNOWN)**  
**PORTUGAL**



**DEGREE OF KNOWLEDGE OF THESE AREAS OF DIGITALIZATION (FROM THE BEST KNOWN TO THE LEAST KNOWN)**  
**SPAIN**



Interreg SUDOE

SOE3/P2/E0866

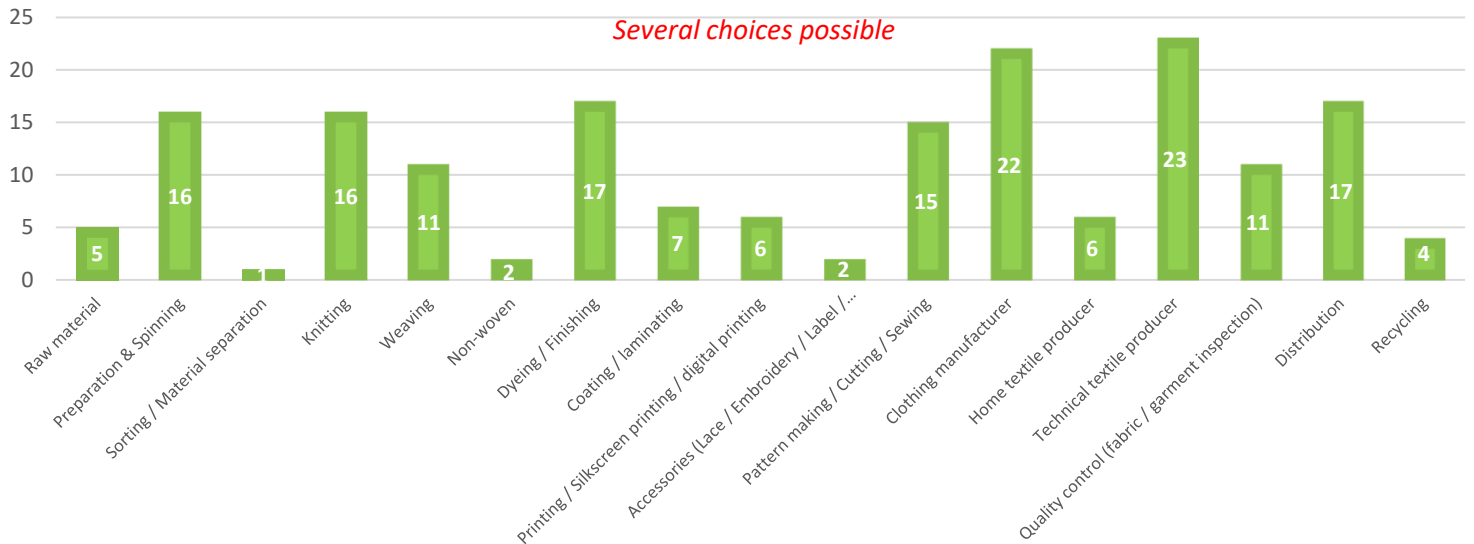
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**Digital maturity diagnosis**  
**Quantitative analysis**

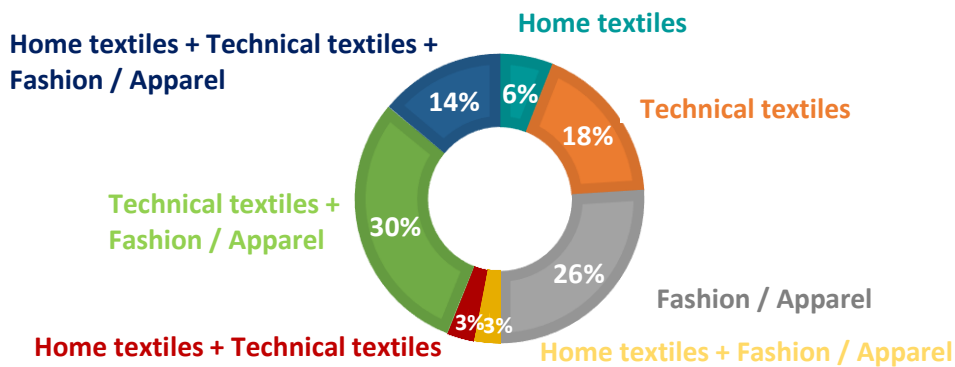
**IDENTIFICATION**



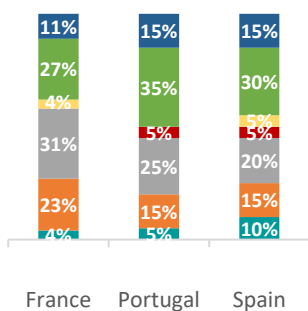
#### 43 - WHAT IS THE ACTIVITY OF YOUR COMPANY?



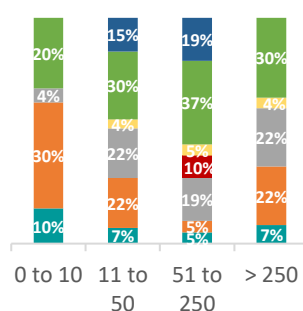
#### 44- WHAT ARE THE MAIN MARKETS OF YOUR COMPANY?



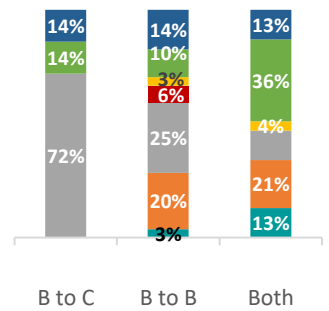
##### Country



##### Company size



##### Type of customers



**Comments:** 50% of the companies that responded to the questionnaire work in only one market, while 36% work in two markets and 14% work in three markets.

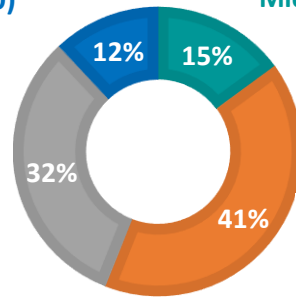
#### 45- WHICH IS THE SIZE OF YOUR COMPANY?

Big company (> 250)

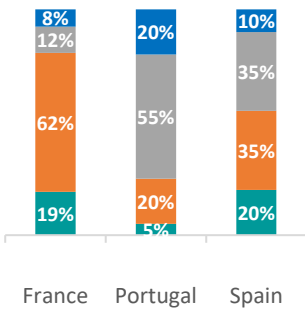
Micro (0 to 10)

Medium company  
(51 to 250)

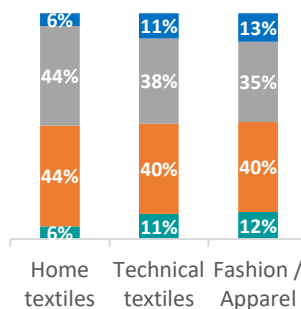
Small company  
(11 to 50)



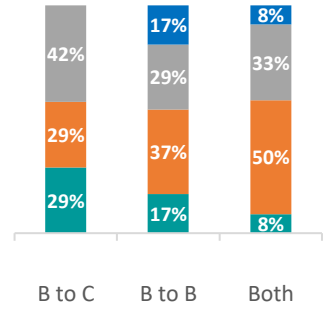
##### Country



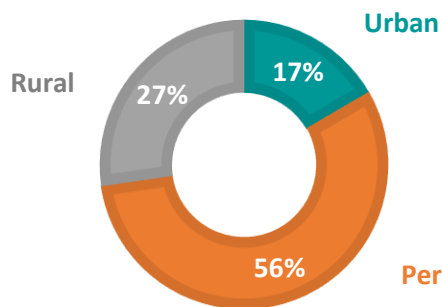
##### Main market



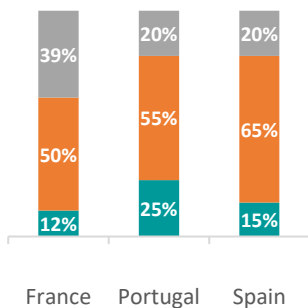
##### Type of customers



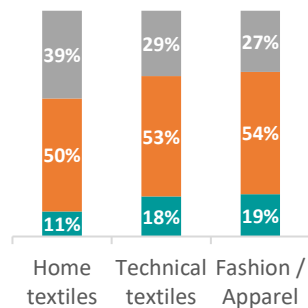
#### 46- IN WHAT TYPE OF ENVIRONMENT IS YOUR COMPANY LOCATED?



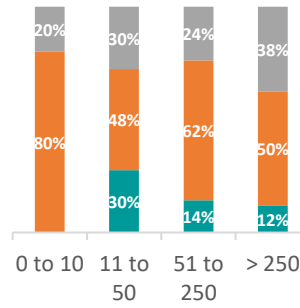
##### Country



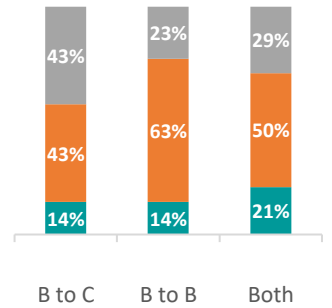
##### Main market



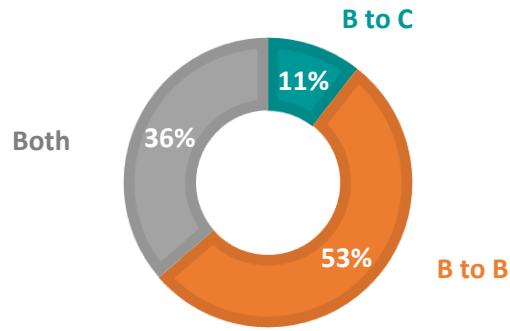
##### Company size



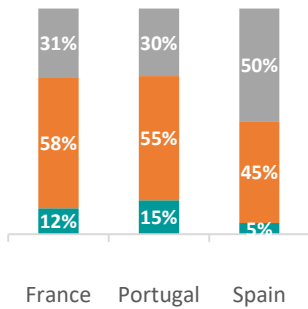
##### Type of customers



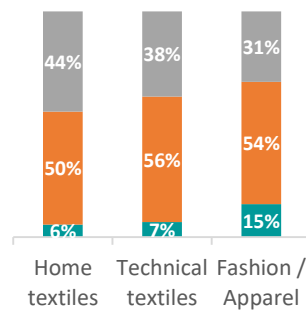
#### 47- WHAT IS YOUR MAIN TYPE OF CUSTOMERS?



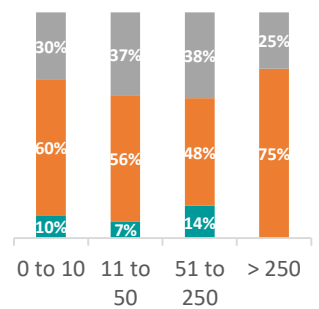
##### Country



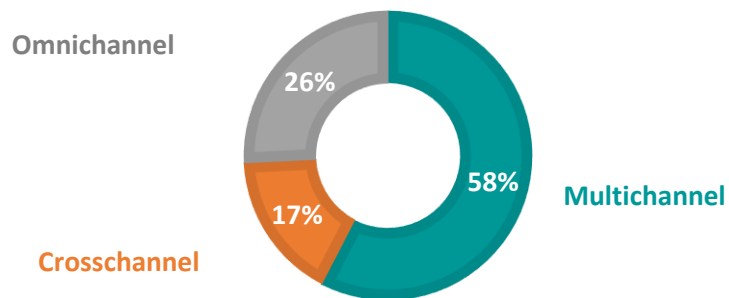
##### Main market



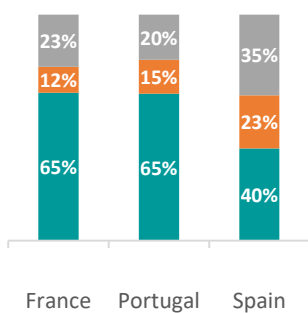
##### Company size



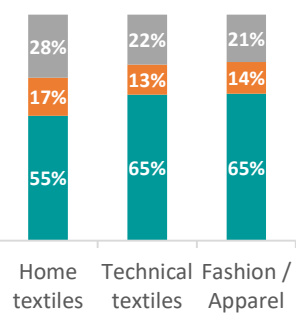
#### 48- WHAT IS YOUR COMMUNICATION/SALES CHANNEL STRATEGY



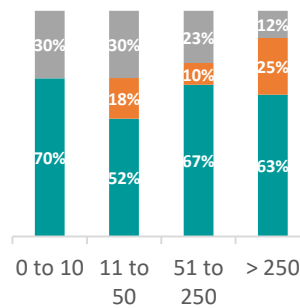
##### Country



##### Main market



##### Company size



##### Type of customers

