



KEY INTERNATIONALISATION ACTIVITIES FOR THE EUROPEAN CHILDREN'S SECTOR

D3.4 CREATION & DEVELOPMENT OF NEW KIDS VALUE CHAINS - CONCLUSIONS FROM THE TRANSNATIONAL MISSIONS

| KIDS

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EXECUTIVE SUMMARY

This report sums up the findings from two transnational missions with the goal of identifying new value chains for the European children's industry concerning internationalization outside of the EU. To conduct the new value chains for the children's industry, knowledge, and data from French, Spanish, and Danish companies (SMEs) have been captured by the local clusters during the two transnational workshops in Copenhagen and Paris.

The insights from the workshops have been gathered and analyzed from the three project themes: Digitalization, sustainability, and gender perspective. This has led to a greater understanding of the innovative strategies and possibilities that lies among the SMEs in the three countries. These strategies and possibilities have made it possible to develop five new value chains to be promoted internationally through a combination of services, products, technologies, and other resources from SMEs and international clusters. The new value chains have been formed with an inclusive approach to the identified differences among the companies and therefore represent different levels of innovative maturity towards the project themes.

The five new value chains are:

- VC1: Sustainability and longevity
- VC2: Circular business models
- VC3: E-commerce
- VC4: New technologies
- VC5: Gender inclusiveness



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1. ABOUT KIDS

The overall project objective is to foster the internationalization of the EU children's industry by supporting the set-up of a European Children's Cluster (the ESCP-4i) to uncover and exploit the most promising international business opportunities for the children and family markets. KIDS ESCP- 4i will bring together many SMEs, large companies, research and technological partners, public authorities, academia, etc. from different disciplines in a unique European-wide collaborative platform for internationalization. Circularity, digitalization, and gender-based perspective will be key players in the project.

2. DELIVERABLE OBJECTIVES

The overall objective of the transnational missions is to look for new value chains for the European children's industry concerning internationalization outside of the EU.

Based on the knowledge and data compiled under Tasks 3.1 & 3.2, KIDS will conduct a thorough analysis to develop new value chains to be promoted internationally through a combination of services, products, technologies, and other resources from SMEs and other cluster members. This will be based on the children's sector holistic approach followed by KIDS while adding digitalization, sustainability & gender-based principles. Therefore, the project will show a European offer to satisfy the global demand trends for the children's industry.

To undertake this work, KIDS will use the information from D.3.1 & D.3.2 as a starting point. Clusters will then capture information from their members to transform this knowledge into new value chains. A key milestone to achieve this goal will be two transnational workshops where the SMEs explore the creation of the new value chains and foster SMEs' transnational cooperation and participate in B2B meetings between EU SMEs to explore the development of new value chains. Based on this, a full report on the 'Creation & Development of new KIDS value chains' (D3.4) will be conducted.

Disclaimer

Due to COVID-19 challenges in the beginning of 2022 we were not able to attend a fair/exhibition as planned when the proposal was written. To keep the timeline of the project and to activate SMEs, instead we decided to plan a value-chain mission to Copenhagen in Spring 2022. This was a successful mission for both Danish and Spanish SMEs. Nova Child and French companies were not able to attend due to COVID-19 challenges. In October 2022 the 2nd mission found place in Paris where we visited KIDexpo an exhibition where French toy companies showcase their latest products. Though, this is not a fair where our SMEs could have participated. Nevertheless, both missions have been fruitful for SMEs from all three countries and the planned new value chains has been created from these missions.

3. TRANSNATIONAL MISSION TO COPENHAGEN

The first transnational mission was hosted by Lifestyle & Design Cluster from 6-8. April 2022, in Copenhagen. Hereunder, the agenda on the transnational mission is presented. All activities supported each other with the goal of challenging the ways of doing business and inspiring the companies to explore innovative value chains:

Agenda

A three-day program designed to learn about international trends in children's product design, delve deeper into internationalization strategies, and explore new forms of retail that are proliferating in the Danish market

6th of April: Retail Day

- 14:15h Retail Walk at Jægersborg, Nørrebro
- 16:00h Retail pitch at Censuum
- 18:15h Dinner at Pincho Nation



7th of April: Internationalisation Day

- 09:15h KIDS Advisory Board meeting
- 11:10h New value chains for internationalisation – by the Danish Innovation Center in Shanghai
- 12:00h Visit to the “Living Sustainable” exhibition
- 13:00h Visit and pitch by the Danish Architecture Center
- 14:00h Panel with Danish brands
- 15:30h Transnational Strategy Workshop
- 18:45h Dinner at Restaurant Klubben

8th of April: Design Day

- 10:00h Ferm Living Showroom at Kuglegårdsvej
- 11:30h Design Museum Denmark, visit & conference
- 13:00h Retail visit at BR, an experiential toy shop



During the three days, companies shared their in-depth knowledge and experience while discussing topics such as innovation, new business models and new value chains, new ways of collaborating between companies, and new ways of approaching markets.

Below is shortly presented the activities, its content, and pictures from the mission.

Retail walk at Jægersborg, Nørrebro



Nørrebro is a quartier specialized in sustainability, local production and community building.



The group visited retail stores, city playgrounds and shops based on principles as upcycling, refurbishing, second-hand product selling and local production.

Retail pitch at Censuum



How do we collaborate to merge online and offline brand experience in order to invent the future of retail?

Censuum has build a model where new brands, born online, can show their products to customers. People come to Censuum to try new products, and Censuum explains the brand identity and purpose to citizens. At Censuum, they monitor the store and provide that data and feedback to the brands, so they know what users are responding to. For instance, today the mostly respond to social responsibility more than climate.

New value chains for internationalisation



Martin Rune Hoxer from the Danish Innovation center in Shanghai shared with the participants how this organism facilitates new partnerships to increase innovation and cross border collaboration.

Visit to the Danish Architecture Center and the “Living Sustainable” exhibition

Danish Architecture Center (DAC) is an international cultural attraction for everyone who wants to experience and understand how architecture and design create the framework for our lives. The exhibitions they host try to approach to everyone, especially children, that architecture and design can help solve some of the world’s major challenges.



Panel with Danish brands

Participants had the chance to listen to a panel of three Danish companies specialised in children clothes and furniture who shares how they sell their products on webshops, livestream, used products platforms and traditional retail.

The Danish brands participating in the panel were Pure Kids, Luksusbaby.dk, and bObles.



Visit and pitch at the Ferm Living Showroom

Ferm Living is a furniture, accessories and lighting brand based on a passion for authentic Danish design and with responsibility at the heart of every piece they make. They work to create honest products and calm environments that inspire to balance the contrasts in life. Ferm Living has a stunning Showroom in Kuglegårdsvej which we had the chance to visit and understand how to create an environment that reflects the brand values from every corner.



Visit and pitch at the Design Museum and the Lifestyle Lab CPH



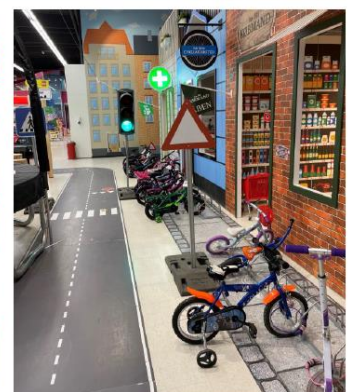
Nikolina Olsen-Rule, Head of Communications at the Design Museum in Copenhagen, explained to the participants the approach they use to ideate and produce the educational programme of the Museum, and how they put effort on creating meaningful cultural experiences around design for all citizens, no matter their ages.



Companies also had time to visit the Lifestyle Lab CPH under the Lifestyle and Design Cluster, a circularity and innovation incubator hub for fashion and technology driven startups.

Retail visit at BR

BR is a true experience of fun and play at a toy store in Copenhagen. The companies visited BR's most enchanting store, a place where kids want to stay for hours to play and try their favourite toys. The shop has a small city inside, with shops, a bike lane, a trampoline, and multiple spaces where to try games and toys.



4. EXECUTION OF THE TRANSNATIONAL WORKSHOP IN COPENHAGEN

The first transnational workshop took place during the visit to Danish Architecture Centre. Participants consisted of companies from the advisory board and cluster members from Spain and Denmark. The overall goal of the workshop was to get companies to meet, discuss and ideate on possible changes in their value chains within three themes: *Sustainability & Circular Economy, Gender-equality, and Digitalization*, all in an international context.

Participants in the workshop

Clusters: Kid's Cluster, CEIV, Lifestyle & Design Cluster

Companies

- Danish
 - Bobles
 - Flexa
 - Pure Kids
 - Design Rocket
- Spanish
 - Abacus
 - Cayro
 - Devir
 - Jovi
 - Micumacu
 - Miniland

The workshop was held with the following agenda:

Program

15:30 Short introduction to workshop by facilitators (LDC)

- Each group (three groups in total) will receive a toolbox with equipment they will need as well as inspiration objects to help them kickstart the ideation process.

Division of groups:

1. group theme: Sustainability & Circular Economy
2. group theme: Digitalization & Gender-equality

15:40 Step 1: Brainstorming/Ideation 45 min

- Say hi, 5 min: Begin by introducing yourself and your product in 1 min.
- Ideation, 15 min: Brainstorm & write ideas (solo) within services, products, technologies, and new business models. Think of existing ideas and point out what it is you find relevant, but also brainstorm on new ideas followed by noting on the post-its emphasizing in keywords the most exciting and essential part of each idea

16:25 Step 2: Voting ideas of the group (voting stickers), 15 min

- Each person shortly presents the ideas for others 3-5 ideas
- Voting session of the ideas (solo)

16:40 Short break

16:50 Step 3: Decisions & presentation

- Choose the best ideas for innovating a value chain, 10 min. (group work)
- Prepare a presentation of the ideas, 25 min. What, why, how, business potential, sales channels, customer segments, etc.
- Each group presents, 15 min (5 min per group)

17:40 Thank you for your time

PART 1: BRAINSTORMING ON ELEMENTS FOR NEW VALUE CHAINS

Before brainstorming on the new value chains, the participants were divided into two groups. At first, the participants presented the products they brought, which fostered a talk about digitalization, circular economy, and gender perspectives that had been touched upon during the day. This talk led to the brainstorming on elements in the new value chains, however, the brainstorming was not limited to these three aspects. We encouraged them to think about applications of new products and services, new processes and operations, and new business models.

Each participant wrote down possible new ways of doing business on post-its, these were collected by the group and posted on the wall. 37 ideas were generated and have, for the sake of the overview in this report, been divided into five main categories across the two groups of participants:

- 1) Product attributes and brand values, 2) New partnerships, 3) New sales channels,
- 4) Gender perspective, 5) Sustainability/circular perspective.



Product attributes and brand values

- Products for elderly people
- More options for play at different ages (mental/memory issues)
- Ensure the distributor has the same values as the company
- Collaboration of the personalization of brands
- Experience tables for consumers to try on products
- Meetings between retailers and manufacturers.
- Listen to end consumers as a way of getting feedback
- Emotional storytelling - better explanation of products
- Promotion of brand values
- Brand ambassadors to promote the product values
- Imagination (Danish people are 'afraid' of colors)
- Promote fun family moments





New partnerships

- Collaboration projects with other companies to look for distributors
- Partnership for products and sales
- Joint ventures in fairs

New sales channels

- A marketplace in a living lab
- Happenings in stores that connect with its surrounding community
- Experiences (by bus etc.) for parents + children
- Omnichannel strategies - sell in the shop through any device

Gender perspective

- Family inclusivity (all types of families) in manufacturing
- No gender restrictions
- Genderless design of clothes
- Challenge stereotypes

Sustainability/circular economy

- Sustainable selection
- Circular economy- Reuse/return/repair/refurbish
- Build toys with recycled components
- Use recycled materials
- Local production
- Recycling fabrics for clothes
- Secondhand shop for toys
- Long-lasting products
- Brochure for recusing toys
- Renting out boxes with toys



PART 2: PRIORITIZING ELEMENTS FOR NEW VALUE CHAINS

After the first exercise of brainstorming on possible elements within the new value chains, the participants were asked to prioritize the ideas generated in the brainstorming. The groups were given stickers, and each participant was asked to vote for three different ideas. Altogether, 13 ideas were prioritized within four categories, ranking from 1 to 15 votes. Though, no ideas within the gender perspective were prioritized, assumingly due to low maturity among the companies.

Product attributes and brand values

- Products for elderly people (7 votes)
- Promote fun family moments (5 votes)
- Ensure the distributor has the same values as the company (3 votes)
- More options for play at different ages (mental/memory issues) (3 votes)

New partnerships

- Collaboration projects with other companies to look for distributors (15 votes)
- Partnership for products and sales (8 votes)
- Meetings between retailers and manufacturers (1 vote)
- Collaboration of the personalization of brands (1 vote)

New sales channels

- A marketplace in a living lab (8 votes)

Sustainability/circular economy

- Sustainable selection (12 votes)
- Reuse/return/repair/refurbish (7 votes)
- Sustainability in the future (2 votes)
- Use recycled materials (1 vote)

PART 3: DECIDING ON ELEMENTS FOR NEW VALUE CHAINS

The ideas that got the highest number of votes in the above section, became the focus when the companies chose which ideas that could contribute to new value chains. The first group focused on expanding the view of how to do international sales of products and services by creating collaborative partnerships with fellow companies in the industry. The second group focused on offering a sustainable selection of products or/and sustainable services (return/repair) to interested customers.

5. TRANSNATIONAL MISSION TO PARIS

The second transnational mission was workshop hosted by Nova CHILD at 26-28. October 2022 in Paris. Hereunder, the agenda on the transnational mission is presented. All activities supported each other with the goal of challenging the ways of doing business and inspiring the companies to explore innovative value chains:

The program was as following



Day 2 27th Oct.

9:00 AM

Coffee break

1 PM

3 PM

7:45 PM

Workshop Day

Transnational strategic workshop:

Discover the potential and the opportunities of the European Union Children's sector. An exclusive KIDS Study:

- Map the EU children's sector and hence provide a transnational picture of it.
- Identify and map key relevant EU strategic partners which might add business value to the industry.
- Identify front-runners SMEs championing in the international markets.
- Identify new business opportunities.



Multiburo Paris Gare Montparnasse – 46 bis av Maine, 75015 Paris

Lunch

Visit to Kidexpo's exhibition:

More information next page



1 Place de la Porte de Versailles 75015 Paris (Hall 7.1)

Network dinner



Le Village Monge – 96 rue Monge – 75005 Paris

Day 3 28th Oct.

10 AM

12 PM

1:30 PM

Marketplace Day

Marketplace's meeting:

Presentation of several french marketplace and retailer : JouéClub, Oxybul and

10:05 (am) - **Chloé Devos** – Business Developer Marketplace Greenweez

10:45 (am) - **Franck Mathais** – Spoker man of JouéClub

11:30 (am) - **Catherine de Bleeker** – CEO of the brand Oxybul



Multiburo Paris Gare Montparnasse – 46 bis av Maine, 75015 Paris

Lunch

End of the mission

During the three days, companies were interacting to explore international partnerships and shared knowledge, successes, and challenges within their business on several topics including ways of doing business in new value chains.

Steering Committee Meeting



The meeting between the 4 clusters allowed a conversation about the evolution of the KIDS project, the program during the three days in Paris, and preparations for future missions.

Retail tour

Gémo KIDS

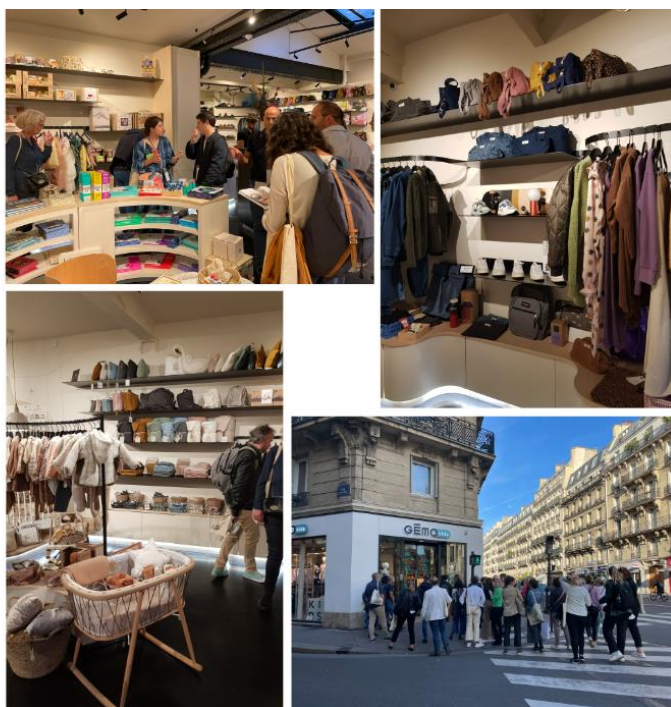
Offers a wide range of clothes, shoes, and accessories from 3 to 16. The concept store for children is unique for the brand

Bonhomme de Bois

Has existed for the past 30 years and selects authentic and traditional toys from a quality and originality perspective for both wooden toys, soft toys, and games.

Smallable

A concept store offering clothes for children, furniture, and decoration in a historic shopping environment.



Kidexpo's exhibition

The exhibition welcomes families and children through a pathway defined by 3 main areas: Learning, Moving, and Playing that showcases fun and educational solutions, sports activities essential to children's development and newly developed games and toys.



Marketplace meeting :

Inspirational presentation of several french marketplace and retailers

Greenweez - Chloé Devos, Business developer
Jouéclub - Franck Mathais, Spokesman
Oxybul - Catherine de Bleeker, CEO



6. EXECUTION OF TRANSNATIONAL WORKSHOP IN PARIS

During the second day of the trip, the second transnational workshop was held at Multiburo Paris Gare. Participants consisted of companies from Spain, France, and Denmark. The overall goal of the workshop was to get companies to meet, discuss and ideate on possible changes in their value chains within three themes: *Sustainability & Circular Economy*, *Gender-equality*, and *Digitalization*, all in an international context. Before the trip to Paris, all companies were introduced to the three themes and asked to choose and re-search one theme, they wanted to explore further during the workshop.

Participants in the workshop

Clusters: Kid's Cluster, Nova Child, CEIV, Lifestyle & Design Cluster

Companies

- Danish
 - Montana Furniture
 - Minmin Copenhagen
 - Op og ned
 - Modu
 - Hoppe Kids
- French
 - Educaborras
 - Porée-Havlik
 - Dada! Animation
 - Gautier France
 - Lolilo
 - Globe Trotoys
- Spanish
 - Munecas Paola SL
 - Jovi
 - Lekkid
 - Marinva
 - Mammaproof
 - Modelos Antineza-Climent
 - Ebbes Design
 - Guisval
 - Kidalos
 - Marina & Pau

The workshop was held with the following agenda:

Program

09:30: Welcome and presentation of new knowledge from the project

10:00: Presentation of companies and products/services in the plenum

10:30: Introduction of the workshop, topics, and division of groups

10:40: Workshop part 1: Knowledge sharing - Discuss your topic

- What do you know about your topic?
- How/why is it interesting?
- Which companies or countries do you know/are frontrunners within your topic?

11:10: Workshop part 2: Partnerships - Discuss business activities within your topic

- Which resources do you need to kickstart activities within your topic?
- Who should you collaborate with to implement activities within your topic?

11:50: Workshop part 3: Internationalization - Discuss how to approach international markets with your new business activities

- Which markets/countries would be interested in your topic?
- How would you approach the market?
- How could you collaborate with companies in the group/on the trip to start activities internationally within your topic?

12:20: Collect main findings including challenges

- Where are you challenged within the topic/where do you lack help or resources?
- Would the clusters be able to contribute with knowledge, support, or something else?

12:30: Presentation of main findings (10 min. pr. group)

13:00: Thank you for today

PART 1: KNOWLEDGE SHARING

All SMEs were divided into groups based on their initial chosen topic. Then they were asked to discuss the topic from three questions. The answers from the groups have been divided into the three themes of the workshop. The answers below are therefore a gathering of the ideas and discussions from multiple groups within the same topic, e.g., sustainability.

What do you know about your topic?

Group theme: Sustainability

Sustainability is understood very differently in each country even though the regulation from the EU is the same. They can both be seen as long-lasting products, natural materials, circular business models, or the use of the lowest amount of chemicals in the production.

Furthermore, there is seen issues related to the consumer-perspective of the topic, as consumers ask for sustainability but will not pay the price (intention-behavior-gap). The companies have trouble explaining the higher value of sustainable products due to a lack of knowledge amongst the consumers. The companies suggest that consumers are educated through programs, and activities that will educate them on the area.

At last, sustainability is causing financial issues in several aspects e.g., shipping, and packaging. For some companies, there are also technical difficulties in terms of recycling plastics.

Group theme: Gender perspective

Even though, there is seen a cultural difference in the approach towards the gender perspective, several companies see a change in the behavior and the choice of activities and products between boys and girls in their counties - an evolution of norms and habits for kids, growing from especially big cities in the Western world.

The companies want to focus more on gender-neutral colors to put the product and not the gender in focus. The color must not determine to whom the product is intended. Several companies see a challenge in educating adults on the new gender perspective as many parents or grandparents are raised under old gender stereotypes and have difficulties challenging these.

It was agreed from several companies that this area involves not only the children's industry, but society, and governments - still, companies can be innovative within this area.

Group theme: Digitalization

The companies see new habits, especially among young people in relation to Artificial Intelligence, the use of tablets for learning, electronic toys, video games, and digital educational products. Still, the companies find their physical products and stores are preferred but are starting to change their mindset to a more digital and technological thinking. The companies find digitalization and technology as great opportunities to innovate their value chain and business model.



How/why is it interesting?

Group theme: Sustainability

The companies find the need to change the industry to take care of the environment. This applies both for consumers and companies. They identify that there need to be a regulative push toward especially companies to look towards new business opportunities in innovative business models, approaching the consequences of consumerism and overproduction. Furthermore, the companies find it important to educate consumers to buy products of high value and to use, take care of, and repair the products.

Group theme: Gender perspective

The companies see a progress in society from the next generations (Gen Z). They grow up with a larger need to challenge gender stereotypes. The companies identify that we all have a responsibility as we all have an impact - including schools and other institutions affecting children's social

environment. The companies find the need to break the ‘rules’ of gender by educating children through the products they are surrounding them with.

Still, companies see that there is a large gap between the younger and elder generations, as they experience differences in the focus towards changing gender stereotypes. This also applies for different countries inside and outside of the EU, where not all are at the same path towards gender inclusiveness. For example, companies exemplify that Russia wants standard gender-specific colors, and in Spain, the top SEO search for toys is “toys for boys” or “toys for girls”.

Group theme: Digitalization

The companies find the topic interesting as both digitalization and technology in products are important for children to explore new ways of playing and learning. They find a need for them and other companies to have a strategic direction in mind for the future.



Which companies or countries do you know/are frontrunners within your topic?

Group theme: Sustainability

Frontrunners are seen as e.g., Kvadrat (produces furniture from used textiles and rents furniture out) and Actiu (produces furniture for airports and hospitals with sustainability restrictions concerning energy, water consumption, and workplace).

The Spanish and French companies recognize that it is often an ownership of a certificate that indicates a frontrunner position, but the Danish companies find that in the Nordic countries,

certificates on products are not enough anymore - they are only used for marketing and do not tell if a company is sustainable.

Group theme: Gender perspective

One of the frontrunners is identified as LEGO. The company announced that it will stop gender-divided products (in the future). The companies find it necessary for the big and powerful brands to take the first step as they can reach more people and generate more impact. Same way Volkswagen is the principal sponsor of Copenhagen Pride, mentions a Danish company. On the other side, big brands have pressure from several stakeholders. It can be easier to apply if you are a small brand such as Raduga Grez (Russia) or Co. Label (Denmark)

PART 2: PARTNERSHIPS

The SMEs who wanted to change groups to discuss a different topic was allowed to do this. Afterward, they were asked to discuss business activities from two questions. The answers from the groups have been divided into the three themes of the workshop.

Which resources do you need to kickstart activities within your topic?

Group theme: Sustainability

Several of the companies are missing information about sustainability, and the resources to find this and start working with it in their own company and country - therefore, navigating sustainability regulations from different countries can be very hard.

If the companies should invest in sustainability, this will include an investment in the production and packaging amongst activities within sales, marketing, and communication to include sustainability reports and certifications. Companies see both internal and external communication as highly important as companies must communicate more and better on their sustainability to employees and customers.

This is in line with the idea, that not only the products, but the whole company needs to be sustainable. The companies find the strategy as a top-down decision and the management team must be willing to implement and invest in sustainability for it to succeed.

Group theme: Gender perspective

The companies find marketing and communication as very important and necessary. The concept must be explained through the core concepts and values of the brand. This also applies to internal communication as the team must have greater knowledge within the area.

Group theme: Digitalization

The companies see a need for collaborating with different technological partners. It is recognized by several companies that digitalization and technology are not implemented fast in the organization but must be done in several smaller steps including help from external partners or by hiring an internal workforce.

Furthermore, the companies find new methodological processes in marketing, management, and manufacturing important for the digital and technological journey as well.



Who should you collaborate with to implement activities within your topic?

Group theme: Sustainability

There are different suggestions among the companies on which partners can accelerate sustainable actions within a company. For example, the chamber of commerce, certifications as B-Corp, KIDS clusters, and recycle/renting platforms were all mentioned.

It was also discussed how companies can cooperate to look for investment together. In general, partnerships with other companies or organizations must be made with the same engagement and willingness to change toward sustainability.

Group theme: Gender perspective

For collaborations, the companies find professionals, influencers and marketing professionals essential as especially social media has a lot of power to communicate value on this area. Looking towards international markets, market researchers who know the country is important to target the market right in terms of market maturity.

Group theme: digitalization

When increasing digitalization and focus on technology in the company, both technical providers within e-commerce, etc. are essential to partner with, according to the companies. Second, comes a strong communication effort, which must be prioritized in terms of resources.

PART 3: INTERNATIONALIZATION

The SMEs who wanted to change groups to discuss a different topic was allowed to do this. Afterward, they were asked to discuss how to approach international markets with new business activities from three questions. The answers from the groups have been divided into the three themes of the workshop.

Which markets/countries would be interested in your topic?

Group theme: Sustainability

The companies do not find China and South Korea concerned about sustainability. Countries in the EU are more mature - though there exists an intention-behavior gap, where consumers want sustainable products, but do not want to pay the price. Interesting countries was identified as Finland, Sweden Norway, Canada, Japan, and New Zealand. In general, countries with large incomes, high educations, and close to European mentalities, culture, and values.

Group theme: Gender perspective

The companies want to look towards more multicultural societies with frontrunners within this area. Germany and Spain in Europe, otherwise USA depending on the area - New York, Boston, San Francisco, and LA are mentioned as areas to approach. Also, South America is mentioned including Chile, Colombia, and Argentina. Areas NOT to go to are South Africa and China.

Group theme: Digitalization

The companies find European countries as Poland, France, and the UK interesting. Outside of the EU, Canada and Japan is found relevant to investigate.



How would you approach the market?

Group theme: Sustainability

When approaching the new market, the companies find it important to do a step-by-step introduction to information about the company and the products to potential clients and retailers in the chosen countries. This could be by attending Trend Fairs and selling via B2B platforms and marketplaces. It can also be an advantage to have a special certificate that will prove sustainability in the foreign country.

Group theme: Gender perspective

When approaching the new market, the companies find it important to consider that in many countries, a gender perspective is only a concern among the wealthy group of society. Therefore, they would suggest localizing the stores with a higher pricing point. Furthermore, several companies would approach the market through influencers.

Group theme: Digitalization

The companies would first research the market and adapt technical requirements and products to this. Furthermore, they would focus on both the digital and physical sales channels, e.g., the metaverse and Trade Fairs. In addition, some companies mention that they would start selling

products digitally before going physically into the market while others would focus on ‘phygitalisation’ (physical + digital) where physical products are being sold in the digital world, e.g., through the Metaverse

How could you collaborate with companies in the group/on the trip to start activities internationally within your topic?

Group theme: Sustainability

The companies find it attractive to organize in groups and from this collaboration, a common penetration of the market could be made possible. The companies see that if they work together, it can be easier for customers and consumers in target markets to understand and comprehend foreign brands.

Group theme: Gender perspective

The companies thought of doing a product collaboration in terms of product development. Thereby the companies are easily introduced in each country. Furthermore, sharing contact information of relevant people in foreign markets with each other will enhance the knowledge base and therefore it will be easier to approach new clients or retailers for new companies, etc.

Group theme: Digitalization

The companies saw possible collaborations in approaching different marketplaces together. Furthermore, the companies found it relevant to investigate logistics together in terms of e.g., shipment. Last it was suggested to develop a common e-commerce platform where the companies have the chance to sell their products to a chosen market.



CHALLENGES FOR COMPANIES

The answers from the groups have been divided into the three themes of the workshop.

Where are you challenged within the topic/where do you lack help or resources?

Group Theme: Sustainability

- Prices setting
- Certificates
- Involve manufacturers
- Different rules, regulations, and policies between different EU countries.
- Consumer willingness to pay a higher price
- Knowledge and strategic insights on the subject
- Human and financial resources
- The economic contexts of the target countries (create differences in priority)

Group theme: Gender perspective

- Knowledge and strategic insights on the subject, culture, competitors
- Knowledge of rules, regulations, and policies in target countries outside the EU
- Human and financial resources

Group theme: Digitalization

- Human and financial resources
- Knowledge and strategic insights on the subject
- Price setting
- Incorporation of digital technologies

Would the clusters be able to contribute with knowledge, support, or something else?

Group theme: Sustainability

The companies thought that it might be helpful if the clusters spoke with other clusters and governments from different target countries to connect companies' problems with common solutions. If all clusters unite, they will have the strength to define pain points and promote changes to the governments.

Furthermore, the companies are missing common rules on certification, tracking, and transparency. This could be handled by developing a unique label for the children's industry that helps to sell product all over the world for those who has been entitled to receive this.

Group theme: Gender perspective

Intern cluster project is found to be a good way for companies can enhance their knowledge and connect with similar countries. Furthermore, the companies supported the idea of collectively approaching a market.

Group theme: Digitalization

The companies were especially looking for a wider network and to do specific collaborations with other similar companies. The companies would also like to be closer to the knowledge created in the project in terms of market research.



7. EVALUATION OF THE TRANSNATIONAL MISSIONS

The overall objective of the transnational missions was to look for new value chains for the European children's industry concerning internationalization outside of the EU. To conduct the new value chains for the children's industry, knowledge, and data from French, Spanish, and Danish companies (SMEs) have been captured by the local clusters during relevant activities for companies including two transnational workshops.

The insights from the missions have been gathered and analyzed from the three project themes: Digitalization, sustainability, and gender perspective. This has led to a greater understanding of the innovative strategies and possibilities that lies among the SMEs in the three countries. These strategies and possibilities have made it possible to develop five new value chains to be promoted internationally through a combination of services, products, technologies, and other resources from SMEs and international clusters.

The companies' evaluation of the trips can be found in the annex.

Going forward in the project

Both missions, including the workshops, were held with great engagement and a high level of knowledge sharing and international collaborative talks between companies. During the missions, it was clear, that topics such as sustainability and digitalization are understood differently depending on how the company is working, who the customer is and what county the company originates from.

Going forward in this project these multiple perspectives are important to keep in mind when approaching international markets. A group of companies with different products and different innovative maturity levels will not always benefit from penetrating a market together or by a similar approach. It could be beneficial to corporate internationally in smaller groups where the maturity level is similar. This also applies to the approach toward the new value chains. The clusters must not only look for the maturity level in different international markets but also the innovative maturity of the company entering.

The five new value chains in the next section are therefore completed with an inclusive approach to the differences among the companies. Therefore, the new value chains present both a more and a less innovative maturity towards especially sustainability (circularity) and digitalization (technology). In relation to gender perspective, companies had similar maturity levels, why only one new value chain has been conducted within this area.

8.FIVE NEW VALUE CHAINS

The five new value chains are completed from the company’s contribution during the two transnational missions and specified during the transnational workshops. As the value chains are completed with the sole input of the companies, some areas of the value chains have not been touched upon - this can be due to a lack of knowledge of these areas’ importance or the well know unimportance of these areas compared to other parts of the value chains.

Value chain 1: Sustainability & Longevity

The innovative maturity level of the company must be low-medium to succeed with the value chain.

VALUE CHAIN 1: SUSTAINABILITY & LONGEVITY				
Support activities	FIRM INFRASTRUCTURE <ul style="list-style-type: none"> Financial resources Collaboration with clusters and similar companies - market penetration with several similar brands Sustainable DNA - investing, implementing, and communicating internally on sustainability and longevity Strategy for transparency and traceability 			
	HUMAN RESOURCES Educated personnel within sustainability and longevity			
	TECHNOLOGICAL DEVELOPMENT <ul style="list-style-type: none"> Research on longevity and sustainability Research on how to enter international markets (especially wealthy countries) Price setting Designing and developing long-lasting products including developing new products or adapting existing products Sustainable product line Complying with national regulations in target countries in product development 			
	PROCUREMENT Responsible restricts for the workplace (energy consumption/trash handling etc.)			
Primary activities	INBOUND LOGISTICS Durable raw materials	OPERATIONS <ul style="list-style-type: none"> Producing and testing products for longevity Local production facilities Restrictions for water and energy consumption More sustainable packaging Involving and educating manufacturers Claims are repaired 	OUTBOUND LOGISTICS	MARKETING <ul style="list-style-type: none"> Certifications Sustainability reports Educational marketing and communication campaigns on sustainability and longevity SALES <ul style="list-style-type: none"> Trend fairs, B2B platforms, and marketplaces with the right values
				SERVICE Repair

Value chain 2: Circular business model

The innovative maturity level of the company must be medium-high to succeed with the value chain.

VALUE CHAIN 2: CIRCULAR BUSINESS MODEL	
Support activities	<p>FIRM INFRASTRUCTURE</p> <ul style="list-style-type: none"> Financial resources Collaboration with clusters and similar companies - market penetration with several similar brands Circular DNA - investing and implementing in the circular economy Strategy for transparency and traceability
	<p>HUMAN RESOURCES</p> <p>Educated personell within circular business models</p>
	<p>TECHNOLOGICAL DEVELOPMENT</p> <ul style="list-style-type: none"> Research within circular business models Research on how to enter international markets (especially wealthy countries) Price setting Designing and developing products from recycled components including developing new products or adapting existing products Developing repair and resale systems in the business Complying with national regulations in target countries in product development
Primary activities	<p>PROCUREMENT</p>
	<p>INBOUND LOGISTICS</p> <p>Recycled components and materials: Second-hand products are made into new raw materials</p>
	<p>OPERATIONS</p> <ul style="list-style-type: none"> Involving and educating manufacturers Claims are repaired Second-hand products are refurbished
	<p>OUTBOUND LOGISTICS</p> <p>Second-hand products is re-stored and re-distributed.</p>
	<p>MARKETING</p> <ul style="list-style-type: none"> Educational marketing and communication campaigns on circular business models Certifications <p>SALES</p> <ul style="list-style-type: none"> Sale of second-hand product Trend fairs, B2B platforms, and marketplaces with values within circularity
<p>SERVICE</p> <ul style="list-style-type: none"> Return of second-hand products for: Reuse/Resale/Repair/Refurbish Education of customers Renting products 	

Value chain 3: E-commerce

The innovative maturity level of the company must be low-medium to succeed with the value chain.

VALUE CHAIN 3: E-COMMERCE					
Support activities	FIRM INFRASTRUCTURE <ul style="list-style-type: none"> Financial resources Collaboration with clusters and similar companies Digital mindset 				
	HUMAN RESOURCES Educated personell within e-commerce				
	TECHNOLOGICAL DEVELOPMENT <ul style="list-style-type: none"> Research on e-commerce Research on how to enter international markets (countries with digital maturity) Developing own e-commerce platform Potential of developing a common e-commerce platform with several kids' brands 				
	PROCUREMENT				
Primary activities	INBOUND LOGISTICS	OPERATIONS	OUTBOUND LOGISTICS <ul style="list-style-type: none"> Online distribution channel Potential of shared logistics with other kids' brands 	MARKETING Online communication and marketing on own website	SERVICE
			SALES New sales channel		

Value chain 4: New technologies

The innovative maturity level of the company must be medium-high to succeed with the value chain.

VALUE CHAIN 4: NEW TECHNOLOGIES				
Support activities	FIRM INFRASTRUCTURE <ul style="list-style-type: none"> Financial resources Collaboration with clusters and similar companies Technological mindset Collaboration with technological partners 			
	HUMAN RESOURCES <ul style="list-style-type: none"> Educated personell within technology 			
	TECHNOLOGICAL DEVELOPMENT Research on new technologies Research on how to enter international markets Price setting Innovative product development including developing new products or adapting existing products			
Primary activities	PROCUREMENT			
	INBOUND LOGISTICS	OPERATIONS	OUTBOUND LOGISTICS	MARKETING Marketing in virtual games for children SALES Through both digital, physical, and virtual channels

Value chain 5: Gender perspective

The innovative maturity level of the company must be low-medium to succeed with the value chain.

VALUE CHAIN 5: GENDER INCLUSIVENESS				
Support activities	FIRM INFRASTRUCTURE <ul style="list-style-type: none"> Financial resources Collaboration with clusters and similar companies 			
	HUMAN RESOURCES Educated personnel within gender perspective			
	TECHNOLOGICAL DEVELOPMENT <ul style="list-style-type: none"> Research on the gender perspective Research on how to enter international markets (especially large cities and multicultural societies) Product development and design including developing new products or adapting existing products Knowledge sharing and product development in collaboration with other kids' brands 			
	PROCUREMENT			
Primary activities	INBOUND LOGISTICS	OPERATIONS	OUTBOUND LOGISTICS	MARKETING <ul style="list-style-type: none"> Educational marketing and communication campaigns Influencer marketing on SoMe
				SALES Stores with a high pricing point
				SERVICE

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ANNEX

1. Evaluation of transnational mission in Copenhagen



Satisfaction Survey: Transnational Workshop in Denmark

What is the area of specialisation of your company? You can choose more than one option.	Games, toys and/or board games	Arts and crafts	Games, toys and/or board games, Others	Games, toys and/or board games, Others	Games, toys and/or board games
How many companies did you meet during the trip?	1-3	3-6	1-3	3-6	More than 6
With how many of them do you think you will collaborate in the near future?	None	1-3	1-3	1-3	1-3
Which activities did you discuss with the companies you met? You can choose more than one option.	Kids, teens and family trends, Internationalisation challenges and opportunities, Circularity and sustainable business models, Gender perspective kids' products, Families' consumption trends and the future of retail	Internationalisation challenges and opportunities	Potential partnerships, Families' consumption trends and the future of retail	Kids, teens and family trends, Internationalisation challenges and opportunities, Potential partnerships, Circularity and sustainable business models, Digitalisation, Innovative design, Families' consumption trends and the future of retail	Kids, teens and family trends, Internationalisation challenges and opportunities, Potential partnerships, Circularity and sustainable business models, Digitalisation, Gender perspective kids' products, Innovative design, Families'
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The retail walk and visit to Censuum was well organised and interesting for my business]	3. Agree	4. Fully agree	2. Disagree	4. Fully agree	3. Agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The pitch from the Danish Innovation Center in Shanghai representative was inspiring and illustrative]	4. Fully agree	3. Agree	3. Agree	4. Fully agree	3. Agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The visit and pitch at the Danish Architecture Center was well organised and interesting for my business]	4. Fully agree	4. Fully agree	3. Agree	4. Fully agree	3. Agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The panel with Danish companies was well organised and interesting for my business]	4. Fully agree	3. Agree	3. Agree	3. Agree	3. Agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The transnational workshop was well organised and useful to discuss the main challenges and opportunities of the EU children's industry]	4. Fully agree	3. Agree	2. Disagree	3. Agree	4. Fully agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The visit and pitch at the Ferm Living Showroom was well organised and interesting for my business]	4. Fully agree	3. Agree		3. Agree	3. Agree

To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The visit and pitch at the Danish Design Museum was well organised and interesting for my business]	4. Fully agree	3. Agree		4. Fully agree	3. Agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. [I have received clear and sufficient information about KIDS project and its outcomes]	3. Agree	4. Fully agree	2. Disagree	3. Agree	4. Fully agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. [The profile of the companies joining the trip was the adequate]	4. Fully agree	3. Agree	3. Agree	3. Agree	4. Fully agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. [In general, I am satisfied with the visits and meetings held]	4. Fully agree	3. Agree	3. Agree	4. Fully agree	4. Fully agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. [I learned about internationalisation and innovative solutions related to digitalisation, innovative design, and sustainability]	3. Agree	3. Agree	2. Disagree	4. Fully agree	4. Fully agree
To what extent you agree with the following statements? Please grade each statement on the scale from 1 to 4, 1 being the lowest and 4 the highest. [The trip provided good opportunities for discussion and networking]	4. Fully agree	3. Agree	3. Agree	4. Fully agree	4. Fully agree
What are the benefits of your company's participation in this trip? You can choose more than one option.	Getting to know the Danish market and finding opportunities to export, Creating new partnerships, Obtaining information about the foreign markets: attitudes and requirements for the product, prices, specifics, regulations, Increasing the experience of participating in international events, Increasing my knowledge on subjects like circularity and sustainable business models	Contacts with buyers / distributors / suppliers / other clusters	Creating new partnerships, Increasing the experience of participating in international events	Getting to know the Danish market and finding opportunities to export, Creating new partnerships, Contacts with buyers / distributors / suppliers / other clusters, Obtaining information about the foreign markets: attitudes and requirements for the product, prices, specifics, regulations, Increasing the experience of participating in international events, Increasing my knowledge on subjects like circularity and sustainable business models	Creating new partnerships, Contacts with buyers / distributors / suppliers / other clusters, Obtaining information about the foreign markets: attitudes and requirements for the product, prices, specifics, regulations, Increasing my knowledge on subjects like circularity and sustainable business models
Do you find it interesting for your company to join a trip like this one in the next months?	Yes	Yes	Yes	Yes	Yes
Would you recommend this trip to the other companies of your cluster?	Yes	Yes	Yes	Yes	Yes
Would you like to participate in the next Transnational Workshop?	Yes	Yes	Yes	Yes	Yes
Please, can you tell us other activities and services that your company would like to receive from the KIDS consortium? You can think of market intelligence related activities, trade fair joint assistance, import-export financing support, mentoring or consultancy for internationalisation...	marketing trends, info about the specific markets, financial support for any innovative activities, opportunities for expositions	not in my position to answer	Digitalization: international marketplaces	Grants and help for international projects, find corresponding companies with the sustainable scenario applied	may be do the same type of trips in other countries, to know each market and options.
Do you have any further comments or recommendations to improve on the next transnational workshop?	No, thank you				

2. Evaluation of transnational mission in Paris

What is the area of specialisation of your company? You can choose more than one option.	How many companies did you meet during the trip?	How many of them you think you will collaborate with in the near future?	Please, tell us how satisfied are you with the mission activities: Please grade each option on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [Retail tour]	Please, tell us how satisfied are you with the mission activities: Please grade each option on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The two studies presented by SIDL Aeorcol]	Please, tell us how satisfied are you with the mission activities: Please grade each option on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [The transnational workshop]	Please, tell us how satisfied are you with the mission activities: Please grade each option on the scale from 1 to 4, 1 being the lowest and 4 the highest. Give an answer only for those activities you participated in. [KIDEXPO visit]
Games, toys and/or board games	5-10	1-05	4 Fully agree	4 Fully agree	4 Fully agree	3 Agree
Others	5-10	1-05	3 Agree	4 Fully agree	4 Fully agree	3 Agree
Games, toys and/or board games, Others	5-10	1-05	3 Agree	4 Fully agree	4 Fully agree	1 Totally disagree
Furniture or home textile for kids	15-20	1-05	4 Fully agree	3 Agree	4 Fully agree	4 Fully agree
Games, toys and/or board games, Arts and crafts	1-05	1-05	3 Agree	5 I don't know	5 I don't know	3 Agree
Others	5-10	1-05	2 Disagree	4 Fully agree	3 Agree	1 Totally disagree
Games, toys and/or board games	5-10	1-05	3 Agree	4 Fully agree	4 Fully agree	2 Disagree
Games, toys and/or board games	5-10	1-05	2 Disagree	4 Fully agree	4 Fully agree	2 Disagree
Games, toys and/or board games	10-15	1-05	2 Disagree	4 Fully agree	4 Fully agree	3 Agree
Others	10-15	1-05	4 Fully agree	4 Fully agree	4 Fully agree	3 Agree
Games, toys and/or board games, Others	5-10	1-05	3 Agree	3 Agree	4 Fully agree	2 Disagree
Games, toys and/or board games	More than 20	1-05	3 Agree	4 Fully agree	4 Fully agree	1 Totally disagree
Furniture or home textile for kids	10-15	1-05	4 Fully agree	4 Fully agree	4 Fully agree	1 Totally disagree
Clothing, footwear and/or fashion for kids	5-10	None	4 Fully agree	4 Fully agree	4 Fully agree	4 Fully agree
Arts and crafts	5-10	None	2 Disagree	5 I don't know	4 Fully agree	1 Totally disagree
Games, toys and/or board games	10-15	1-05	2 Disagree	4 Fully agree	4 Fully agree	2 Disagree
Furniture or home textile for kids	10-15	None	1 Totally disagree	2 Disagree	2 Disagree	1 Totally disagree
Arts and crafts	1-05	1-05	2 Disagree	4 Fully agree	3 Agree	2 Disagree

Please, tell us how satisfied are you with the mission activities.	Please, tell us how satisfied are you with the mission activities.	Would you recommend this trip to other companies of your cluster?	Would you like to participate in the next transnational missions?	Please select three markets outside the European Union that offer opportunities for your company, that you would like KIDS project to explore:	Could you tell us other activities and services that your company would like to receive from the KIDS consortium? (e.g. market intelligence, trade fair fairs assistance, import-export financing support, mentoring or consultancy for internationalisation...)	Do you have any further comments or recommendations to improve on the next missions?
4. Fully agree	4. Fully agree	Yes	Yes	EEUJ, China, Japan	It would be great to receive mentoring about import - export financing support	
4. Fully agree	3. Agree	Yes	Yes	asian market, south america, north europe	market intelligence	
5. I don't know	4. Fully agree	Yes	Yes	The US, Japan, Australia	Market intelligence, import-export financing	
2. Disagree	4. Fully agree	Yes	Yes	Asia (Japan), Middle East, Saudi Arabia	Mentoring for internationalisation	First begin with partners presentation to identify relevant and potential domains. Use
4. Fully agree	4. Fully agree	Yes	Yes	USA, CANADA, MEX	Market intelligence	Thank you so much
3. Agree	3. Agree	Yes	Yes	-	Research, workshops with other companies... Everything mentioned above + grants and subsidies info on the internationalisation of Spanish company activities	
5. I don't know	4. Fully agree	Yes	Yes	the United States, Mexico and China	MENTORING OR CONSULTANCY FOR INTERNATIONALISATION	
4. Fully agree	3. Agree	Yes	Yes	USA, CANADA, PERU		
4. Fully agree	4. Fully agree	Yes	Yes	New sure but, France, UK, SWITZERLAND	Perhaps a Q&A time where the companies on the workshop explain some of the biggest challenges they have had to face and how they	Thanks!
4. Fully agree	4. Fully agree	Yes	Yes	Eritreia, United States, Latin	Market intelligence	
3. Agree	3. Agree	Yes	Yes	United States, Canada, Japan	import-export financing support, mentoring or consultancy for internationalisation	
4. Fully agree	4. Fully agree	Yes	Yes	USA, Japan, Australia	import-export financing support, trade fair fairs assistance	It was great to meet so many interesting brands and discover French market in
4. Fully agree	4. Fully agree	Yes	Yes	south america, australia, north america	Consultancy for internationalisation in term of contacts, fairs, workshops	
4. Fully agree	4. Fully agree	Yes	Yes	0	Consultancy for internationalization and market intelligence	
5. I don't know	3. Agree	Yes	Yes	Don't know	Knowledge about import-export in other stuff than clothes, but information about placements	
4. Fully agree	4. Fully agree	Yes	Yes	US, INDIA, KOREA	partnerships between non conventional EU childrens brands	Divide the retail tour into groups, give a map and let people explore on their own.
4. Fully agree	2. Disagree	No	Yes	Canada, USA, UK	Market intelligence combined with market matchmaking ie retailer marketplace in a market match with our brands.	Better planning, much higher level of retail tour with strong players in the areas we
4. Fully agree	3. Agree	Yes	Yes	USA	market intelligence	Better fit to retail visits