

European Citizens' Perception of the High-End Cultural and Creative Industries

A survey carried out by
May 2013

TNS

European
Cultural
and Creative
Industries
Alliance

CÍRCULO
FORTUNY

COMITÉ
COLBERT

Fondazione
Altagamma

MEISTERKREIS

WALPOLE
BRITISH LUXURY

Main findings

- European citizens see the high-end sector as an ambassador of European values such as quality, excellence and creativity
- European citizens see the high-end industry as a strategic sector for Europe's competitiveness, employment and growth

Methodology

- Update of a study conducted by **TNS Sofres** on behalf of **ECCIA** in 2009 on European citizen's perception of the high-end industry.
- Survey carried out in **France, Germany, Italy, Spain and the United Kingdom**.
- **Telephone** interviews conducted in each country.
- Survey represents perception of 5000 European citizens (1000 in each country).
- **Representative sample of nationals aged 18+ :**
 - **Quota method** in France, Italy and the UK with stratification by region;
 - **Random method** in Germany and Spain.
- European results have been calculated taking into account the weight of each country's population.

The high-end sector as an ambassador of European values

European
Cultural
and Creative
Industries
Alliance

CÍRCULO
FORTUNY

COMITÉ
COLBERT



Fondazione
Altagamma

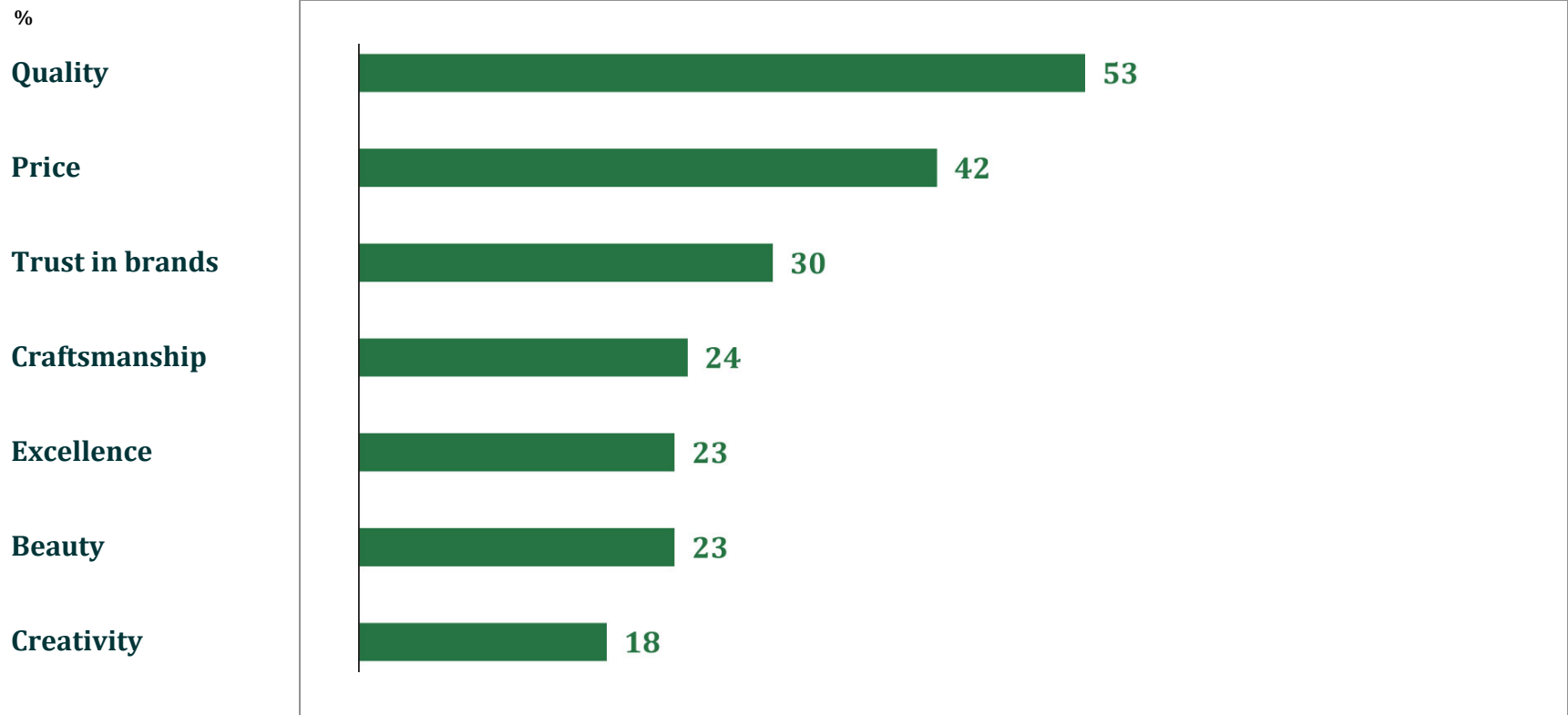

MEISTERKREIS

WALPOLE
BRITISH LUXURY

Which values do European citizens associate with the high-end sector?

Results of the 2013 survey

Q1 Please indicate which words in the following list most effectively evoke your perception of the high-end goods industry, its products and stores. 3 answers maximum

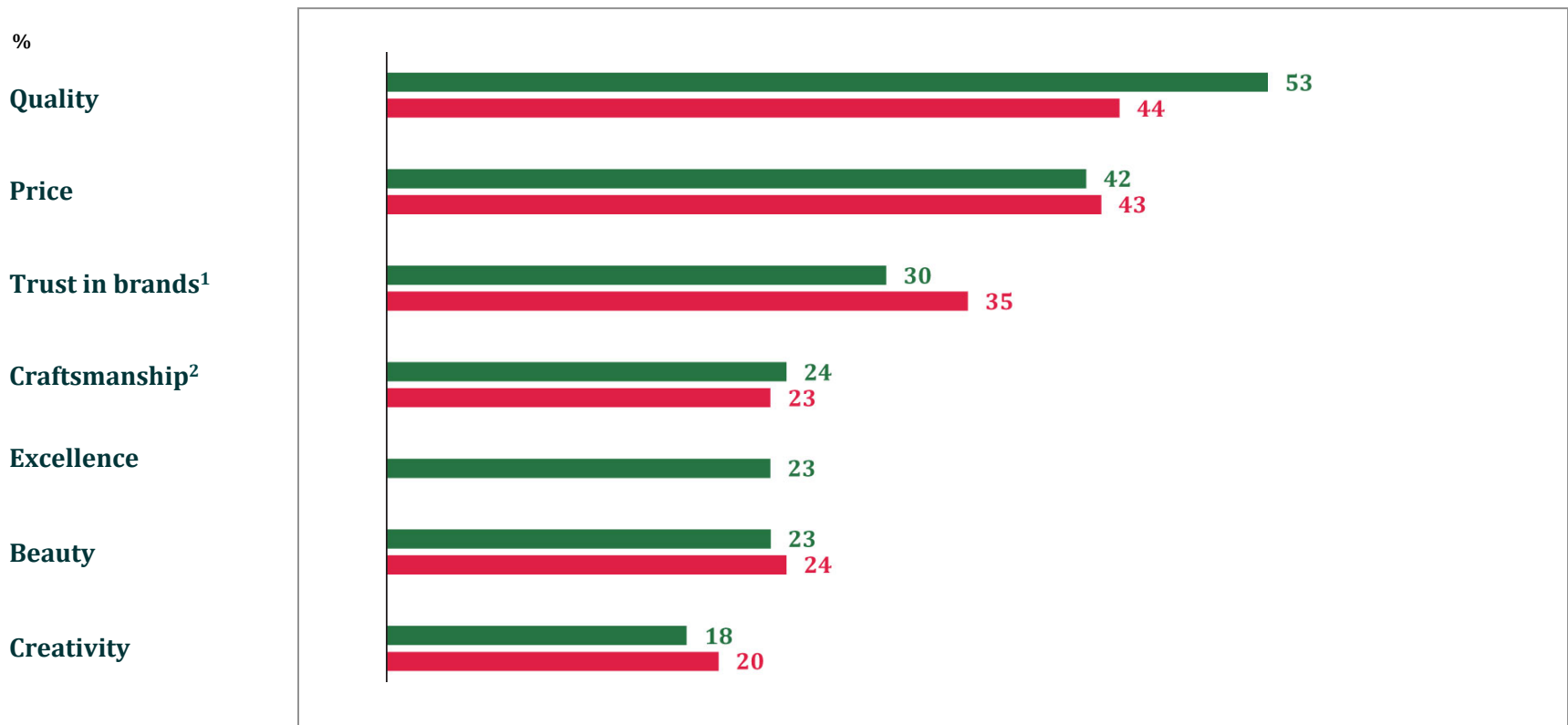


Base : Whole Europe - n = 4835

Which values do European citizens associate with the high-end sector?

Comparison with the 2009 survey

Q1 Please indicate which words in the following list most effectively evoke your perception of the high-end goods industry, its products and stores*. 3 answers maximum



Base : Whole Europe - n = 4835

■ 2013 ■ 2009

Wording 2009 ¹Brands ²Works of art

*In 2009, the question was : "Among the following, could you please tell me the words that best describe the idea that you have about the luxury goods industry, of its products and shops?"

Which values do European citizens associate with the high-end sector?

Detailed national results

Q1 Please indicate which words in the following list most effectively evoke your perception of the high-end goods industry, its products and stores*. 3 answers maximum



Base : Whole sample

■ 2013

Wording 2009 ¹Brands ²Works of art

*In 2009, the question was : "Among the following, could you please tell me the words that best describe the idea that you have about the luxury goods industry, of its products and shops?"

The high-end sector as a strategic sector for Europe's competitiveness, employment and growth

European
Cultural
and Creative
Industries
Alliance

CÍRCULO
FORTUNY

COMITÉ
COLBERT

 Fondazione
Altagamma


MEISTERKREIS

 WALPOLE
BRITISH LUXURY

How do high-end industries contribute to the European economy?

Results of the 2013 survey

Q2 *In your opinion does the high-end goods industry, its products and its stores play a very important, fairly important, not very important or insignificant role in securing*...?*

%

The prestige and appeal of city centers

Economic development by increasing the attractiveness of Europe for tourists

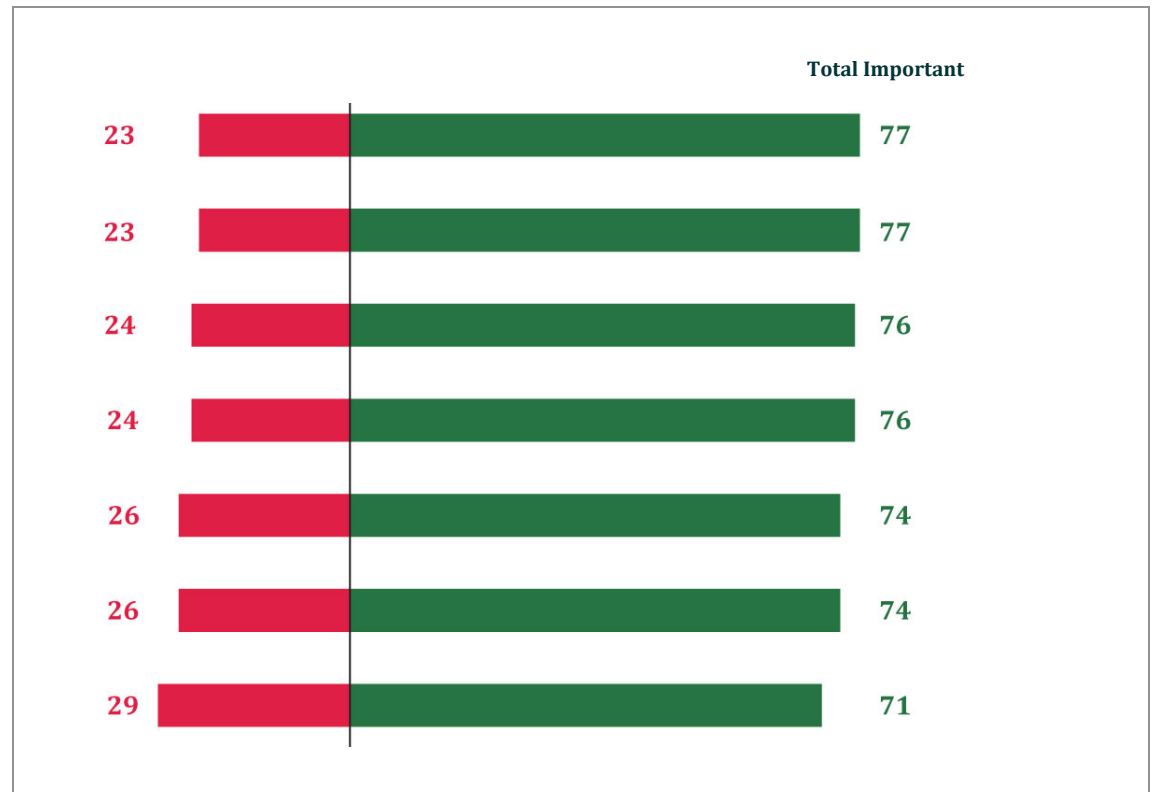
The preservation of craftsmanship know-how and creative professions in Europe.

Employment and economic growth¹

Europe's economic health and competitiveness with respect to the rest of the world²

Competitiveness

The cultural influence of Europe in the world stage³



Base : Whole Europe - n = 4835

■ Fairly important to very important ■ Not very important

Wording 2009 ¹Employment in Europe ²The health and competitiveness of the European economy in a global context ³The cultural image of Europe within the world

How do high-end industries contribute to the European economy?

Comparison with the 2009 survey

Q2 *In your opinion does the high-end goods industry, its products and its stores play a very important, fairly important, not very important or insignificant role in securing*...?*

%

The prestige and appeal of city centers

Economic development by increasing the attractiveness of Europe for tourists

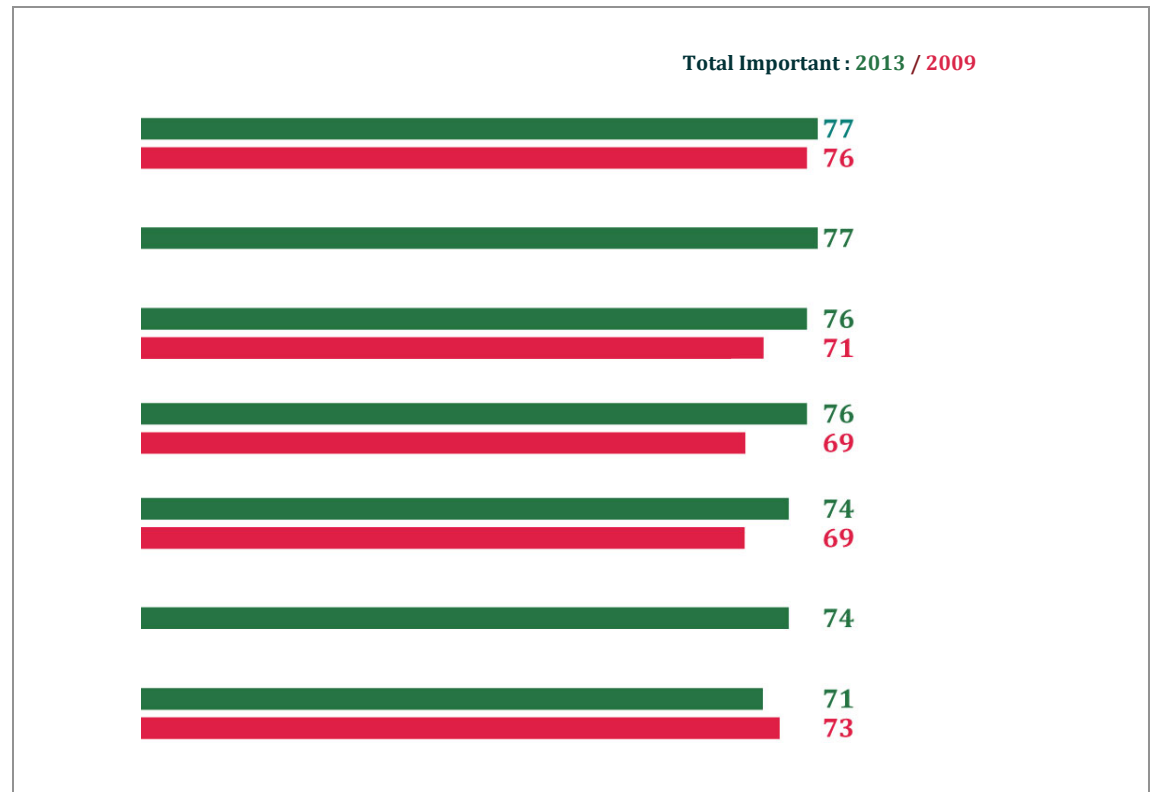
The preservation of craftsmanship know-how and creative professions in Europe.

Employment and economic growth¹

Europe's economic health and competitiveness with respect to the rest of the world²

Competitiveness

The cultural influence of Europe in the world stage³



Base : Whole Europe - n=4835

■ Fairly important to very important (2013)
■ Fairly important to very important (2009)

Wording 2009 ¹Employment in Europe ²The health and competitiveness of the European economy in a global context ³The cultural image of Europe within the world

*In 2009, the question was : "According to you, the luxury industry, its products and shops play a role that is very important, somewhat important, not very important, or not at all important in...?"

How do high-end industries contribute to the European economy?

Detailed national results

Q2 *In your opinion does the high-end goods industry, its products and its stores play a very important, fairly important, not very important or insignificant role in securing*...?*



Base : Whole sample

■ Total important
■ Total not important / Don't know

Wording 2009 ¹Employment in Europe ²The health and competitiveness of the European economy in a global context ³The cultural image of Europe within the world

*In 2009, the question was : "According to you, the luxury industry, its products and shops play a role that is very important, somewhat important, not very important, or not at all important in...?"

How do high-end industries contribute to the European economy?

Comparative detailed national results

Q2 *In your opinion does the high-end goods industry, its products and its stores play a very important, fairly important, not very important or insignificant role in securing*...?*



Fairly important to very important (2013)
 Fairly important to very important (2009)

Wording 2009 ¹Employment in Europe ²The health and competitiveness of the European economy in a global context
³The cultural image of Europe within the world

*In 2009, the question was : "According to you, the luxury industry, its products and shops play a role that is very important, somewhat important, not very important, or not at all important in...?"