

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

A survey carried out by
May 2015

TNS

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Main findings

- The high-end goods industry most readily evokes association with quality, price and excellence.
- In terms of contributing to the European economy, the most important roles high-end industries play, is in securing the prestige and appeal of city centres along with employment and economic growth. The importance of high-end industries in supporting creative professions is also highlighted, whilst its' relationship in securing ethical consumption is less evident.
- The high-end industries' digital presence has a crucial role in in reassuring consumers by providing authentic and original products via a safe and trustworthy experience. Their digital presence should also aim to satisfy an experiential desire for a personalised service and unique experience for consumers.

Methodology

- Conducted by **TNS UK** on behalf of **ECCIA**, a refresh of a study previously conducted by TNS Sofres in 2009 and 2013 exploring European citizen's perception of the high-end cultural and creative industries.
- Survey carried out **in France, Germany, Italy, Spain, Poland*, the Netherlands* and the United Kingdom.**
- **Online**** interviews conducted in each country to provide a consistent approach across all markets.
- Survey represents perception of 7000 European citizens (1000 in each country).
- Representative sample of nationals aged 18+.



The high-end sector as an ambassador of European values

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

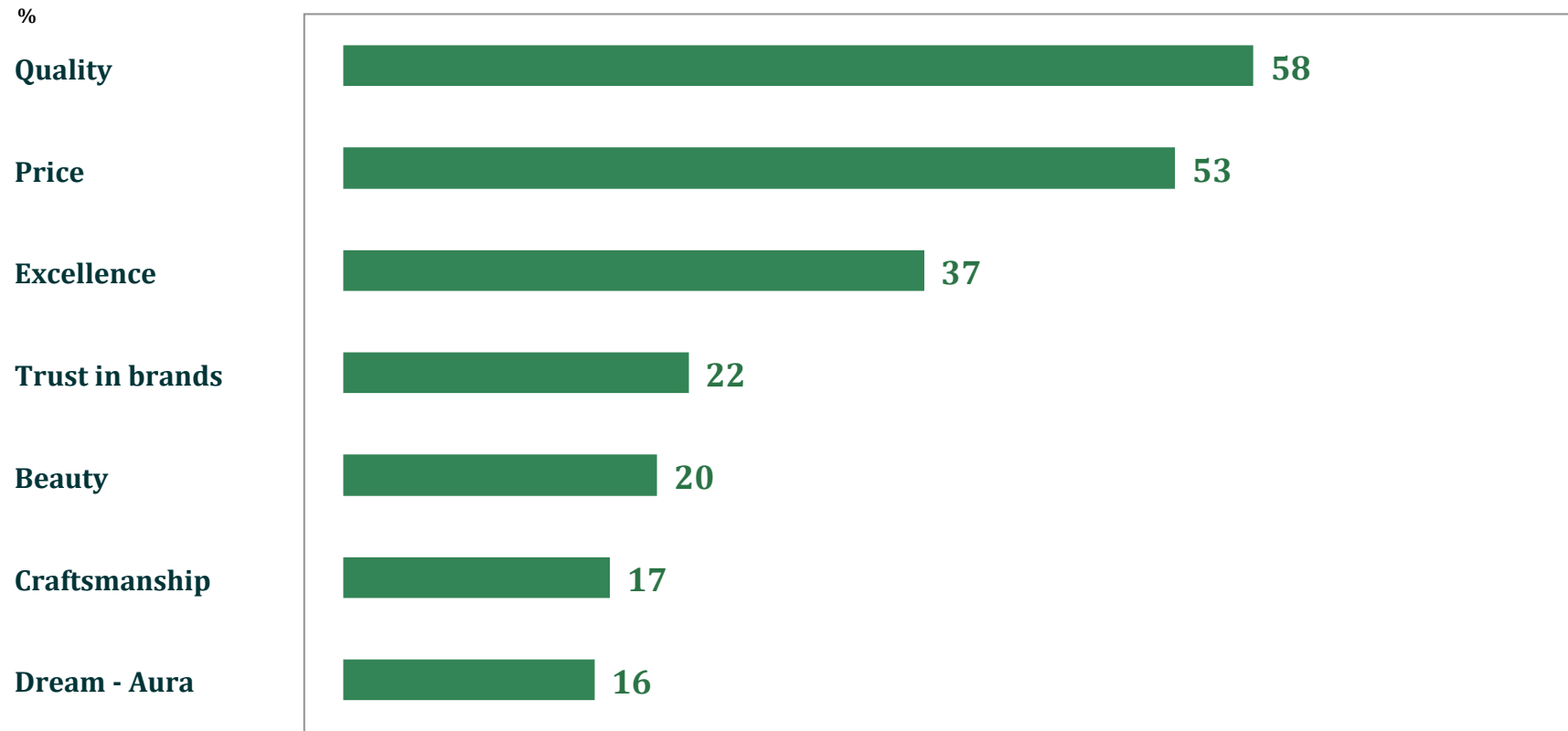
Findings

- The high-end goods industry is most readily associated with quality, price and excellence, reinforcing the synonymous association with high-end goods.
- In contrast craftsmanship, a term with similar connotations to quality, price and excellence, is not associated as strongly by European citizens. Indications are that as high-end industries increasingly operate on a mass scale, their ability to exhibit craftsmanship is diminished.
- Trust in brands is another area that is not a priority association for high-end goods and industries.
- For those in Spain and the UK, quality is a particularly evoked value, whereas consumers in the Netherlands and Italy price is most associated with the high-end sector.

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

Results of the 2015 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 = 7080

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

Results of the 2015 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

%

Creativity



Cultural influence



Employment



Don't know

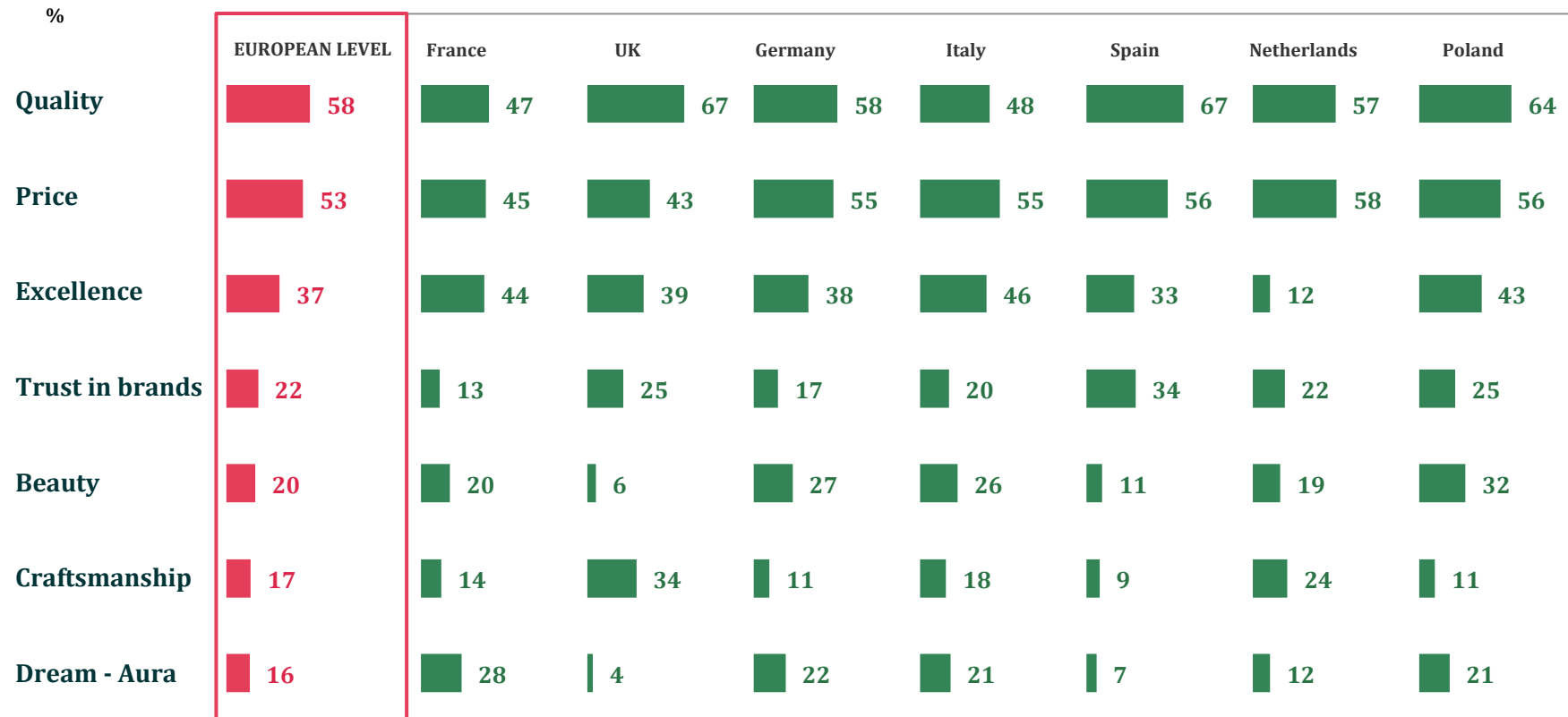


Base : Whole Europe - n = 7080

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

Results of the 2015 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

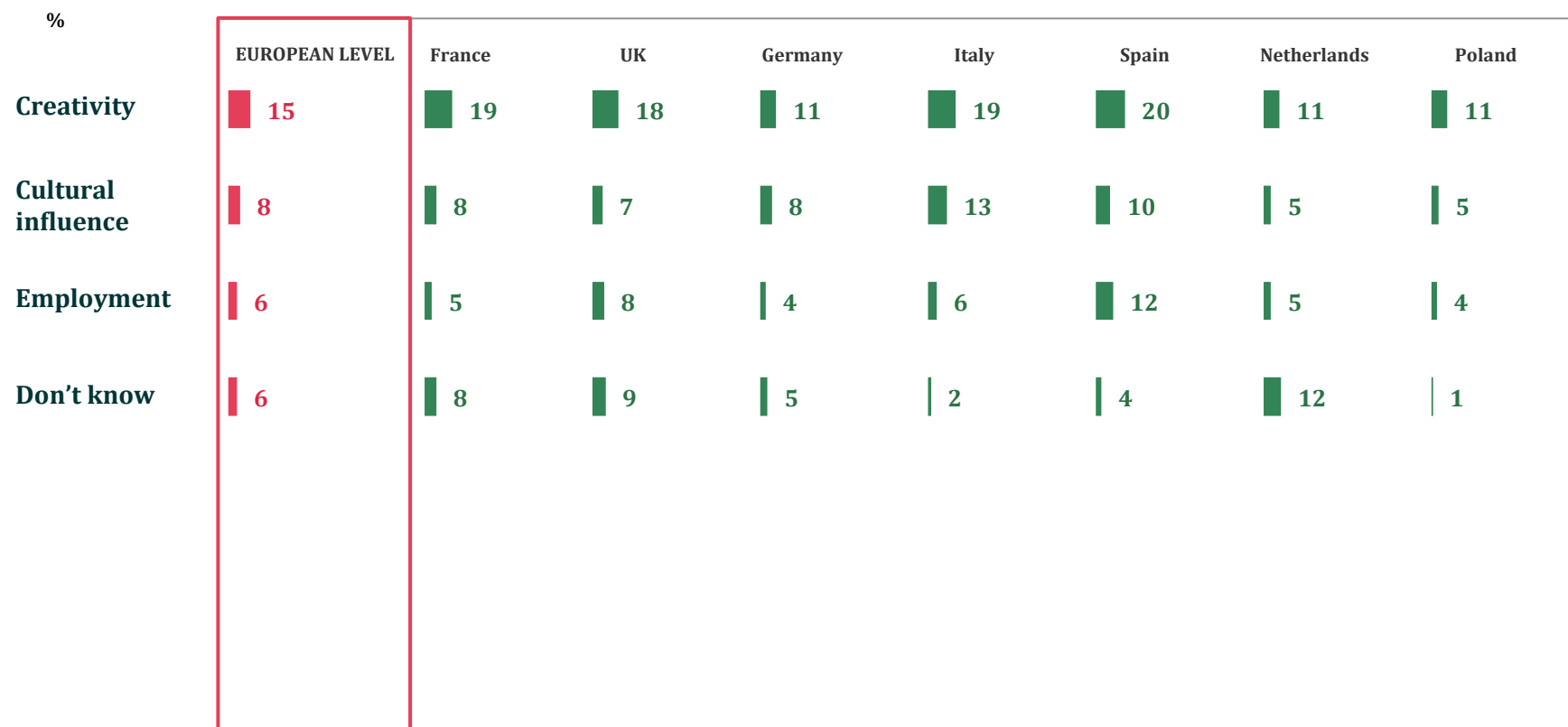


Base : Whole sample

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

Results of the 2015 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 sample

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

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

Findings

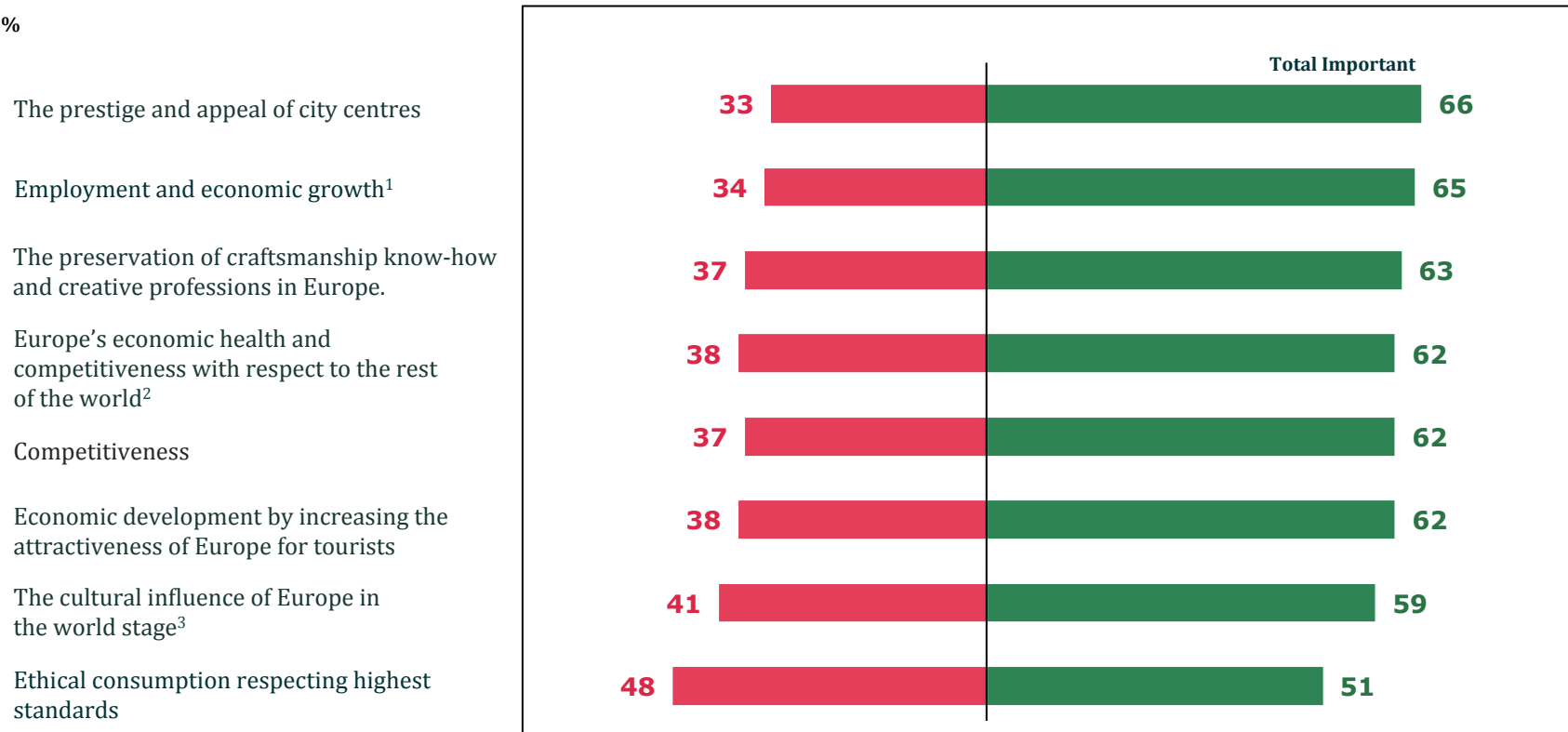
- The most important role high-end industries play for Europe is in securing the prestige and appeal of city centres along with employment and economic growth. The importance of these economic drivers are recognised most highly in Italy, Spain and Poland.
- The perception is that the high-end industry, its products and its stores play an important role in preserving craftsmanship know-how and creative professions in Europe. Given that craftsmanship and creativity have a relatively weaker association with high-end goods and industries, they could look to exhibit these traits to a greater extent.
- The least important role is in securing ethical consumption respecting highest standards, with only 1 in 2 European citizens stating it is very or fairly important.

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

Results of the 2015 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*...?*

%



Base : Whole Europe - n = 7080

■ Fairly important to very important
 ■ Not very important to 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?

Results of the 2015 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*...?

%	EUROPEAN LEVEL	France	UK	Germany	Italy	Spain	Netherlands	Poland
The prestige and appeal of city centres	66 33	70 30	60 40	61 39	73 26	69 31	54 47	77 23
Employment and economic growth ¹	65 34	62 37	66 34	59 40	73 27	71 29	60 40	66 34
The preservation of craftsmanship know-how and creative professions in Europe.	63 37	68 32	65 34	57 43	70 30	58 43	58 42	64 36
Europe's economic health and competitiveness with respect to the rest of the world ²	62 38	58 42	61 39	54 46	71 29	67 32	55 45	69 30
Competitiveness	62 37	56 45	61 39	60 41	71 29	69 31	53 48	67 33
Economic development by increasing the attractiveness of Europe for tourists	62 38	67 33	56 43	47 53	74 26	66 33	52 48	69 31
The cultural influence of Europe in the world stage ³	59 41	67 34	53 47	48 52	70 30	64 35	43 57	67 33
Ethical consumption respecting highest standards	51 48	49 51	52 48	39 61	57 42	57 42	38 62	66 34

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...?"

The high-end sector's digital presence as a channel to promote premium goods, services and experiences

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How important is high-end industries' digital presence?

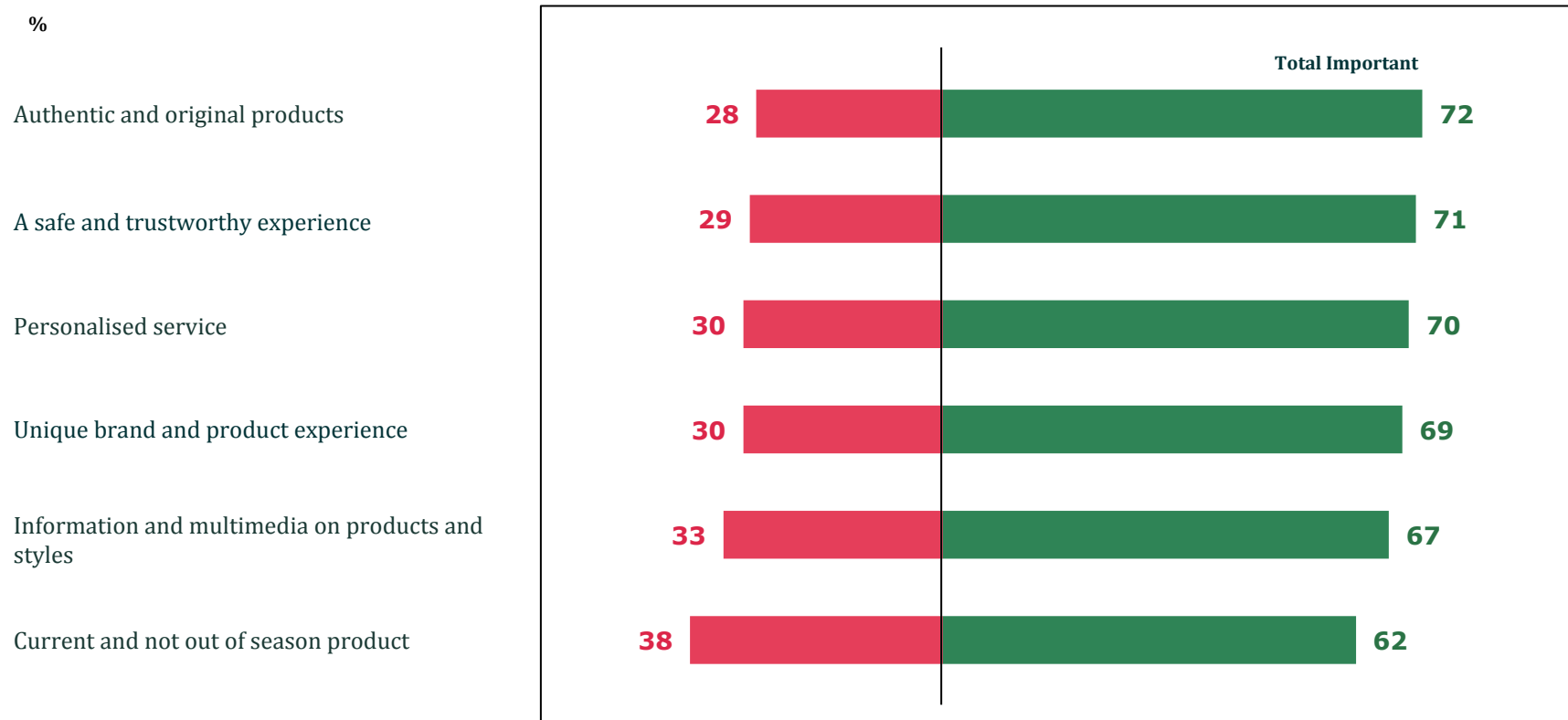
Findings

- The most important roles for the high-end industries' digital presence is to provide authentic and original products, along with a safe and trustworthy experience. This is unsurprising given the continued challenge counterfeiting and illicit trade poses to the industry. As such high-end brands should look to provide assurances and endorsements on their digital channels.
- The importance of providing a personalised service as well as unique brand and product experiences highlights the appetite of consumers for digital touch points to offer the similar levels of gratification and experiential benefits delivered by visits to high-end stores.
- Of lesser importance is the role of digital in providing information/multimedia on products and styles, along with providing current and not out of season products. This perspective is most prominent in France, Germany and the Netherlands.

How important is high-end industries' digital presence?

Results of the 2015 survey

Q3 *In your opinion how important is the role of the high-end goods industries' digital presence in providing...?*



Base : Whole Europe - n = 7080

■ Fairly important to very important
 ■ Not very important to don't know

How important is high-end industries' digital presence?

Results of the 2015 survey

Q3 In your opinion how important is the role of the high-end goods industries' digital presence in providing...?



Base : Whole sample

■ Total important

■ Total not important / don't know

Appendix

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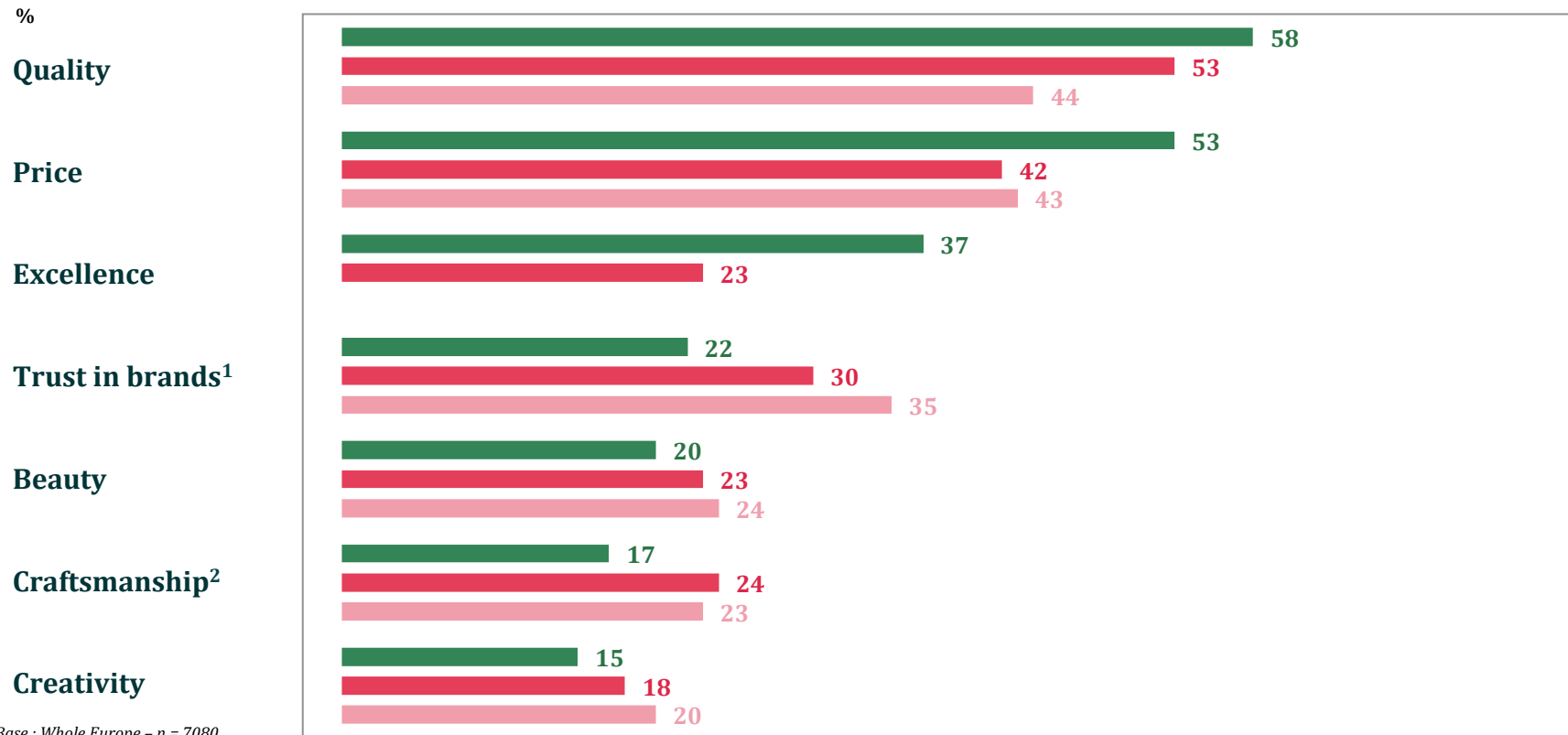
Methodological change and implications

- In 2009 and 2013 the interviews were carried out via telephone, whereas for this wave they were carried out online in order to provide a consistent approach across all markets with the addition of two new markets.
- Due to this change the results presented in subsequent charts are not directly comparable and are provided for **reference only**.
- We would expect to see fluctuations in results with previous years by virtue of a methodological change. Moving forward online interviewing is the way to reach consumers.

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

Comparison with 2009 and 2013 surveys (with new markets included)

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 = 7080

■ 2015 ■ 2013 ■ 2009

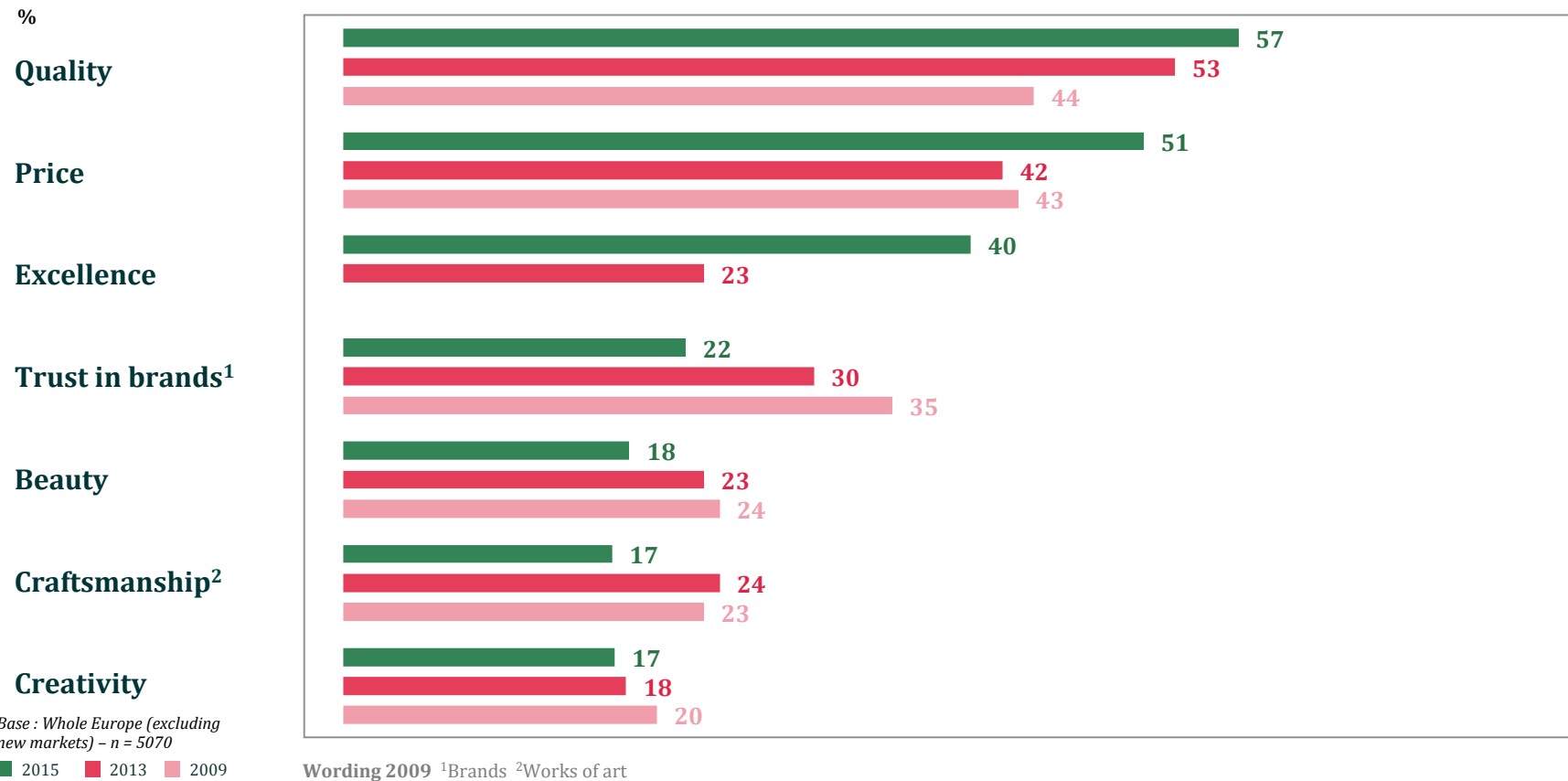
Wording 2009 ¹Brands ²Works of art

*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?

Comparison with 2009 and 2013 surveys (excluding new markets)

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

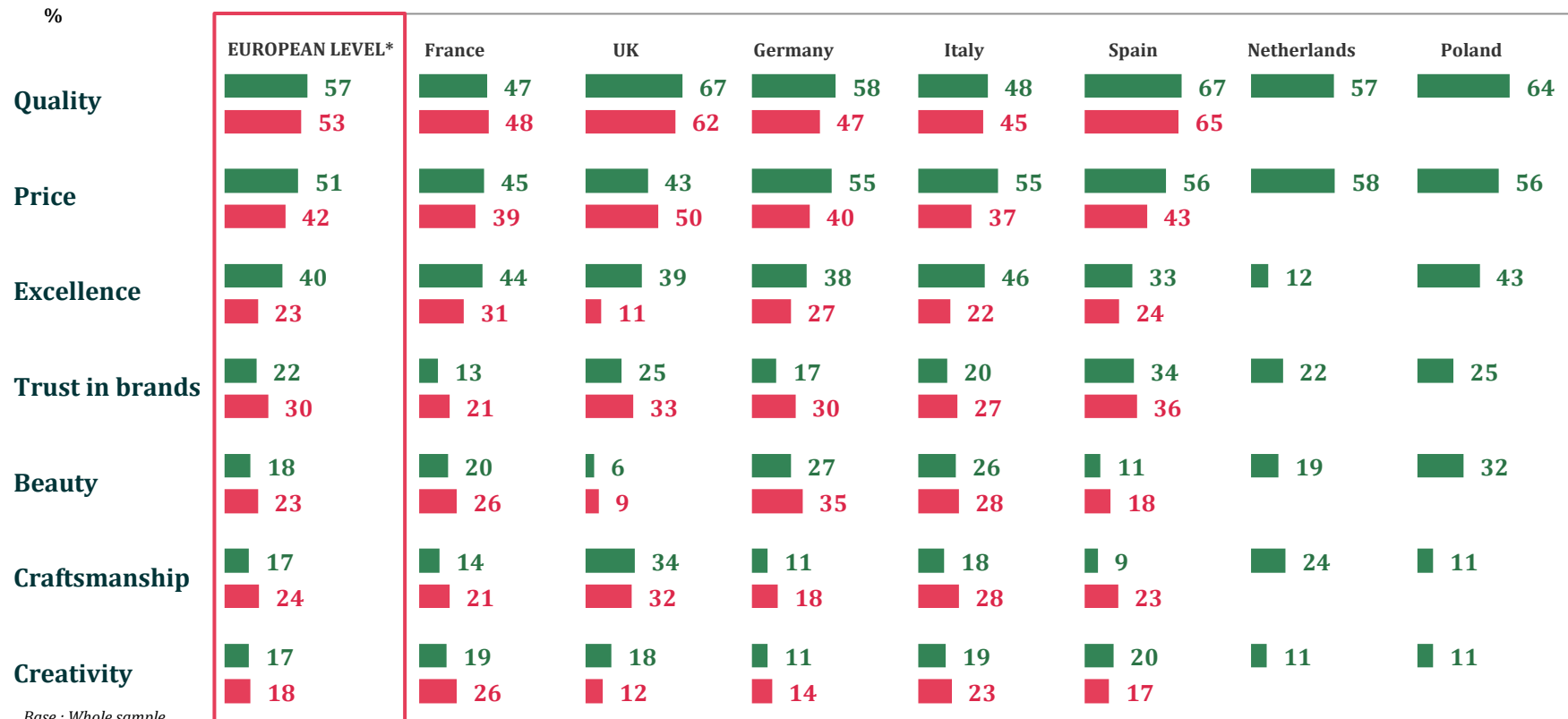


*In 2009, the question was : "Among the following, could you please tell me the words that best describe the idea that you have about the luxury goods industry, of its products and shops?"

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

Comparison with 2013 survey (2009 data not available)

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

■ 2015 ■ 2013

* - excluding new markets

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

Comparison with 2009 and 2013 surveys (with new markets included)

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 Europe - n = 7080

■ Fairly important to very important (2015)

■ 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?

Comparison with 2009 and 2013 surveys (excluding new markets)

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 Europe (excluding new markets) - n = 5070

■ Fairly important to very important (2015)

■ 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?

Comparison with 2009 and 2013 surveys

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

- Fairly important to very important (2015)
- Fairly important to very important (2013)
- Fairly important to very important (2009)

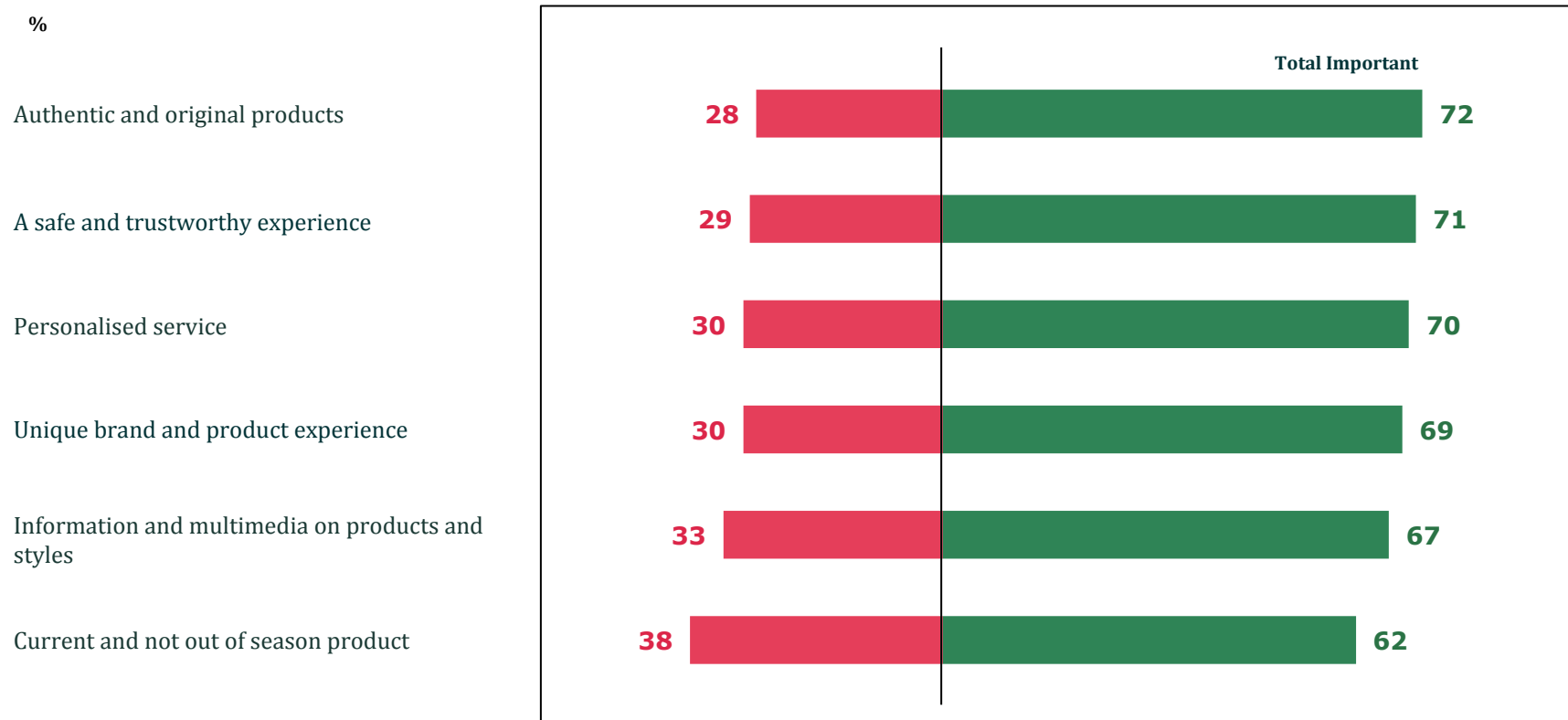
Wording 2009 ¹Employment in Europe ²The health and competitiveness of the European economy in a global context ³The cultural image of Europe within the world

* - excluding new markets

How important is high-end industries' digital presence?

Results of the 2015 survey (no historical data for comparison)

Q3 *In your opinion how important is the role of the high-end goods industries' digital presence in providing...?*



Base : Whole Europe - n = 7080

■ Fairly important to very important
 ■ Not very important to don't know

How important is high-end industries' digital presence?

Results of the 2015 survey (no historical data for comparison)

Q3 In your opinion how important is the role of the high-end goods industries' digital presence in providing...?



Base : Whole sample

■ Total important

■ Total not important / don't know