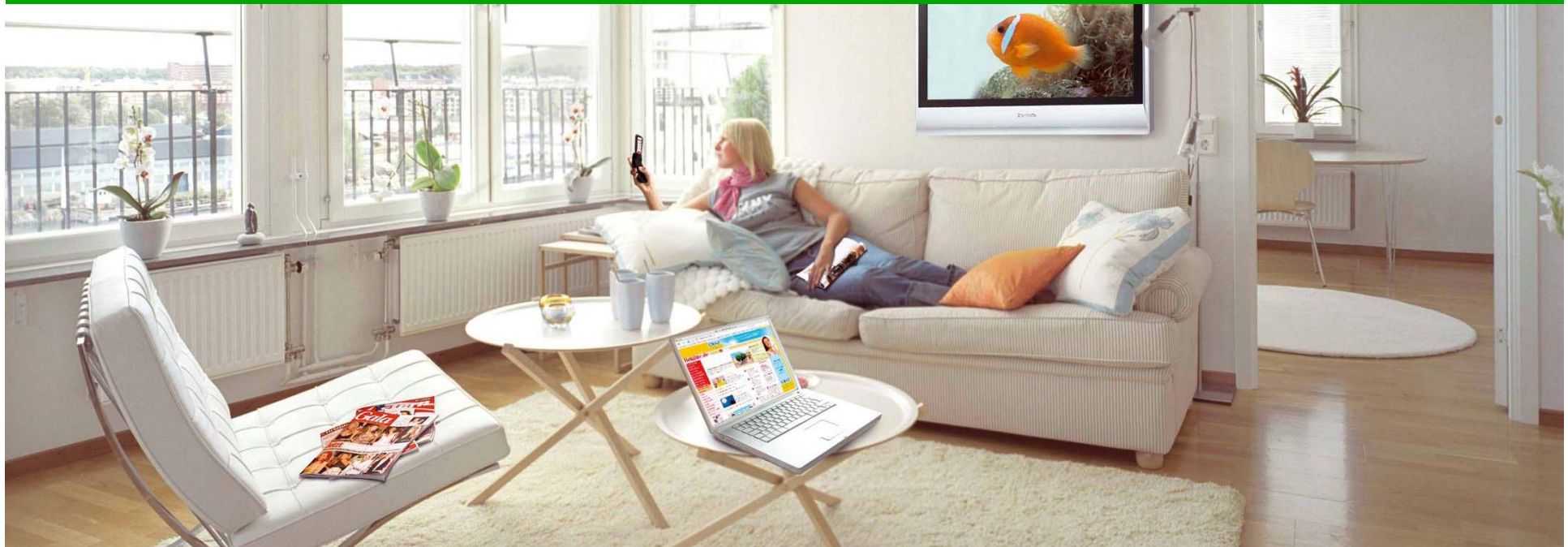
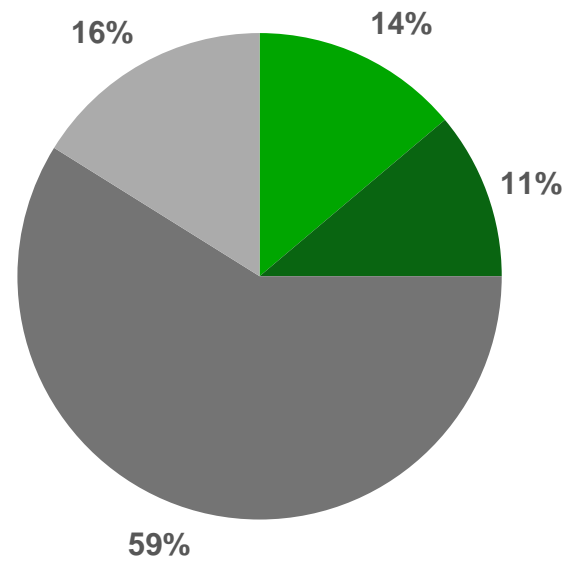


The German Luxury Market



Michael Spielmann | International Media Sales | Hamburg | Feb. 2010

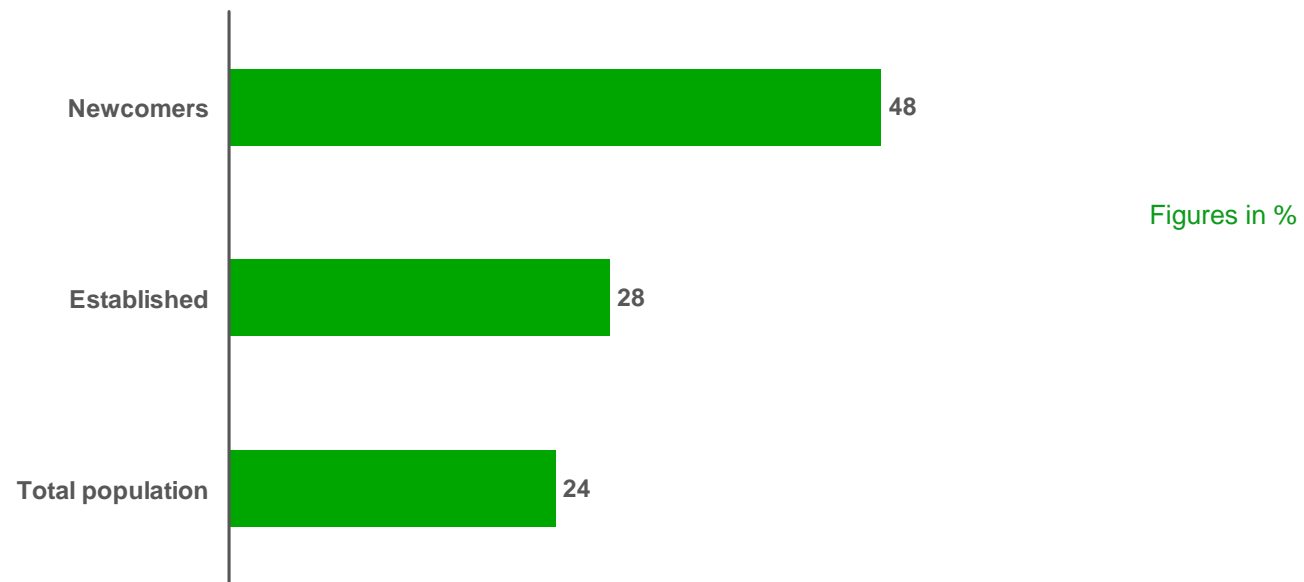
25% of Germans have an “affinity to luxury.”



■ Established ■ Newcomers ■ Reserved ■ Distanced

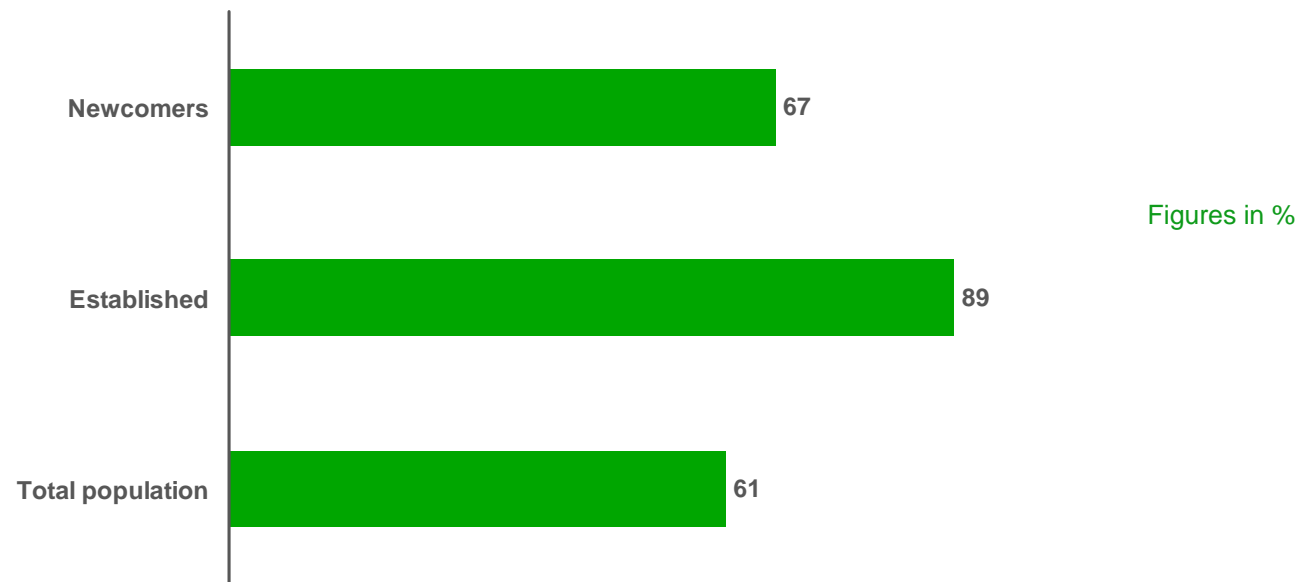
Source: TNS Infratest/KPMG

“I spend much more money for luxury brands than for non-luxury brands.”



Source: TNS Infratest/KPMG

“Luxury brands stand for tradition and something lasting.”



Source: TNS Infratest/KPMG

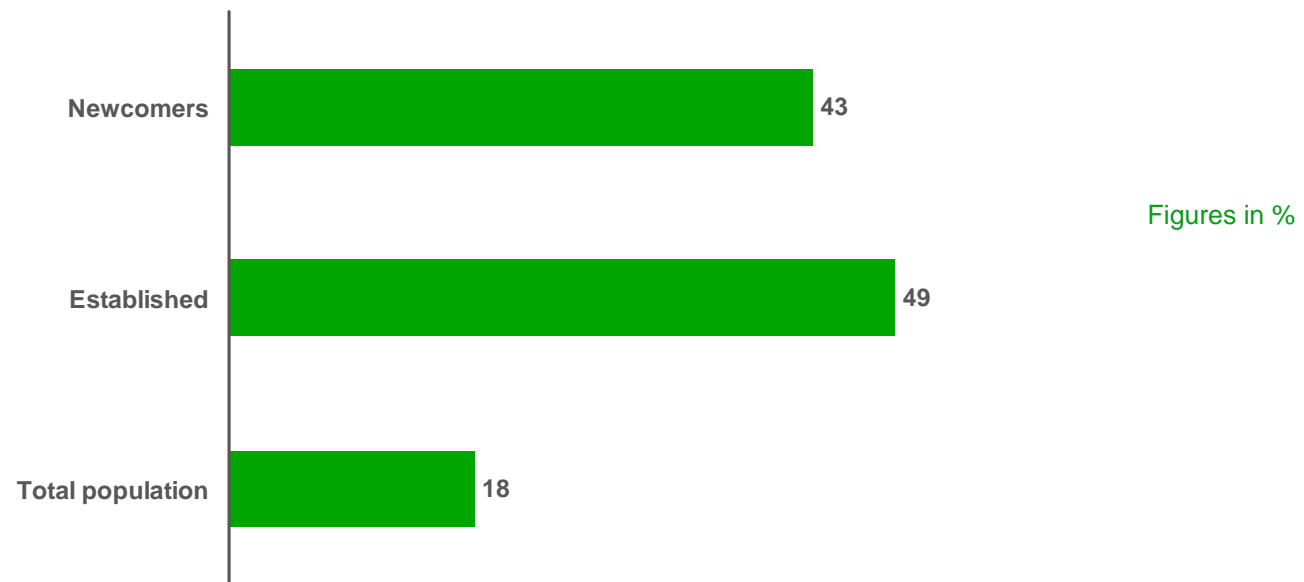
“The purchase of luxury products is often planned.”

Figures in %

Luxury purchases are rarely spontaneous.

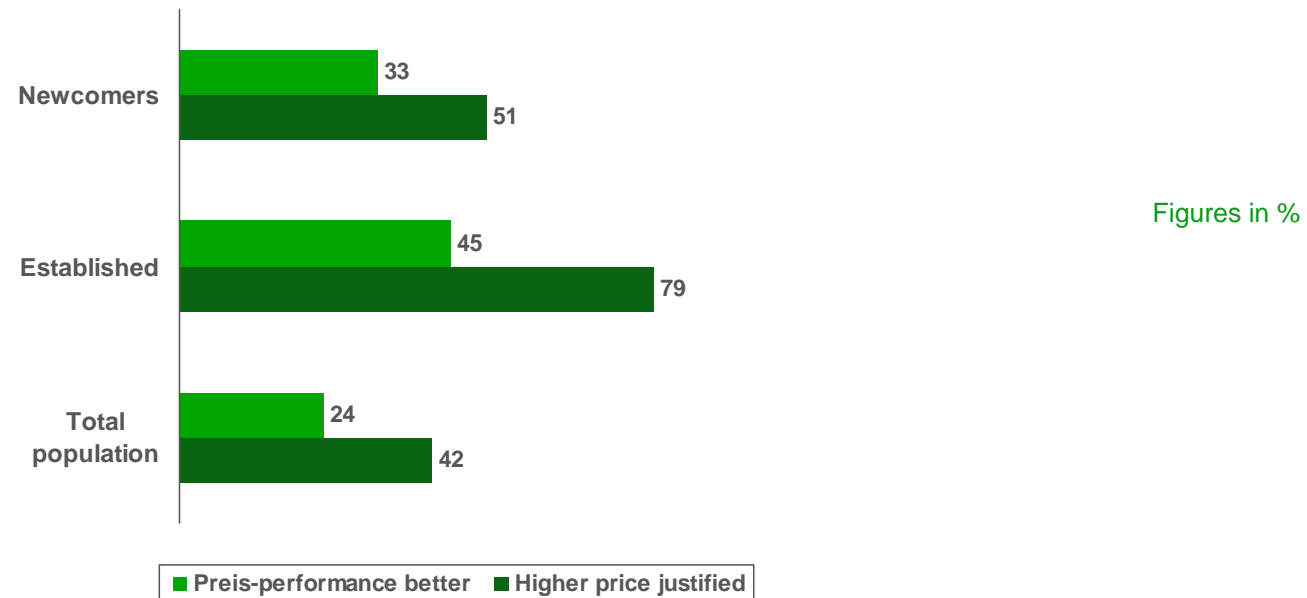
Source: TNS Infratest/KPMG

“Before I buy a luxury product, I save for it.”



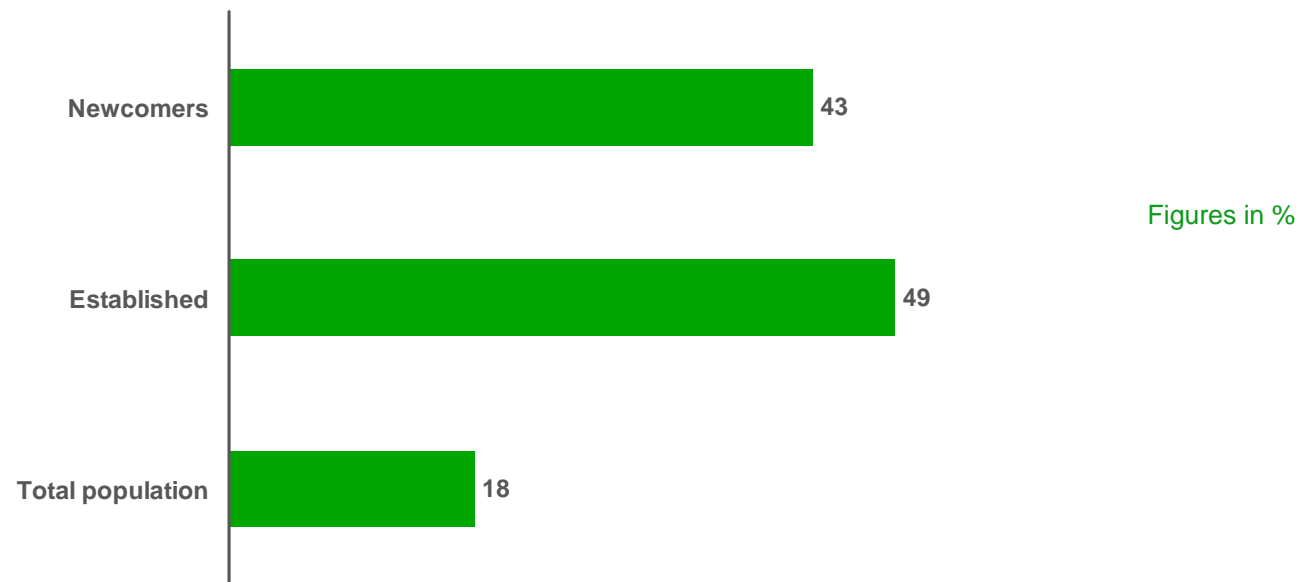
Source: TNS Infratest/KPMG

Price-performance rating and justification of additional cost for luxury products



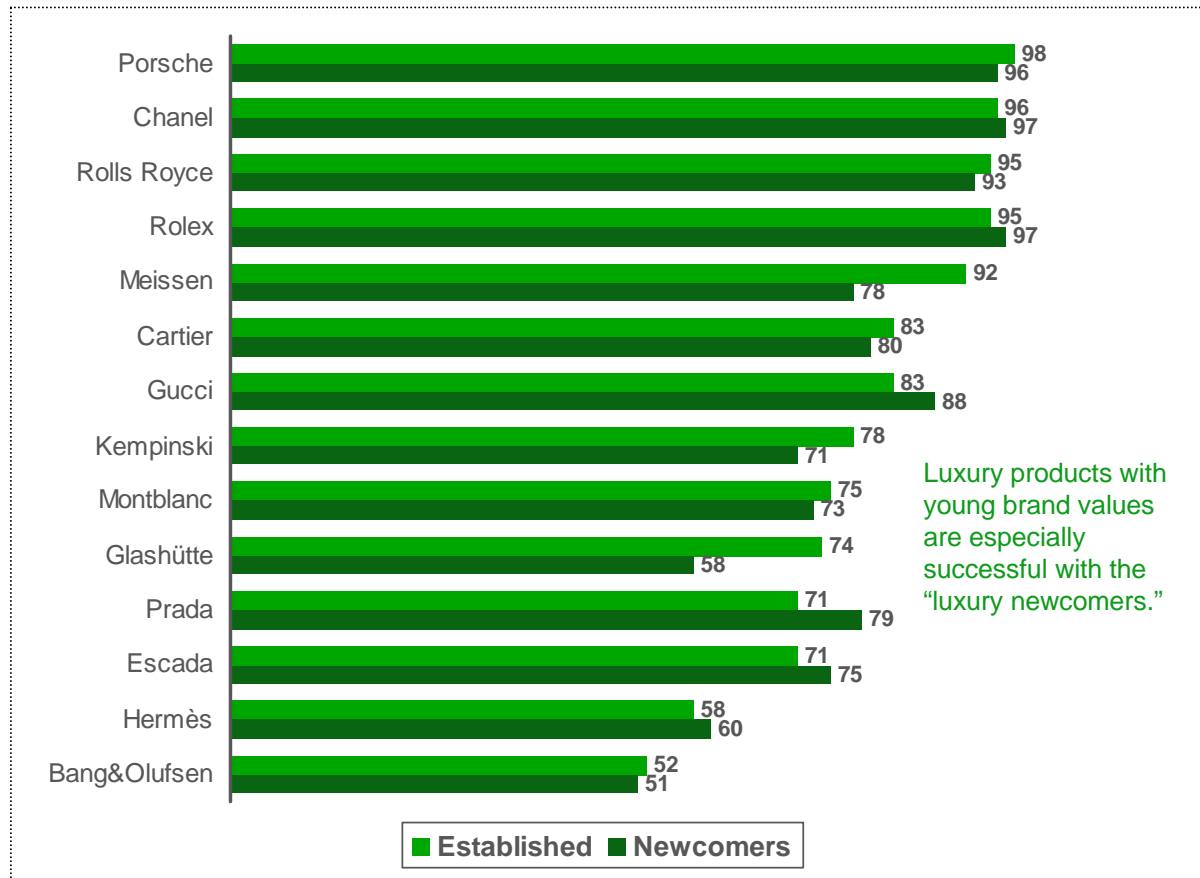
Source: TNS Infratest/KPMG

“I also like to buy imitations of luxury brands.”



Source: TNS Infratest/KPMG

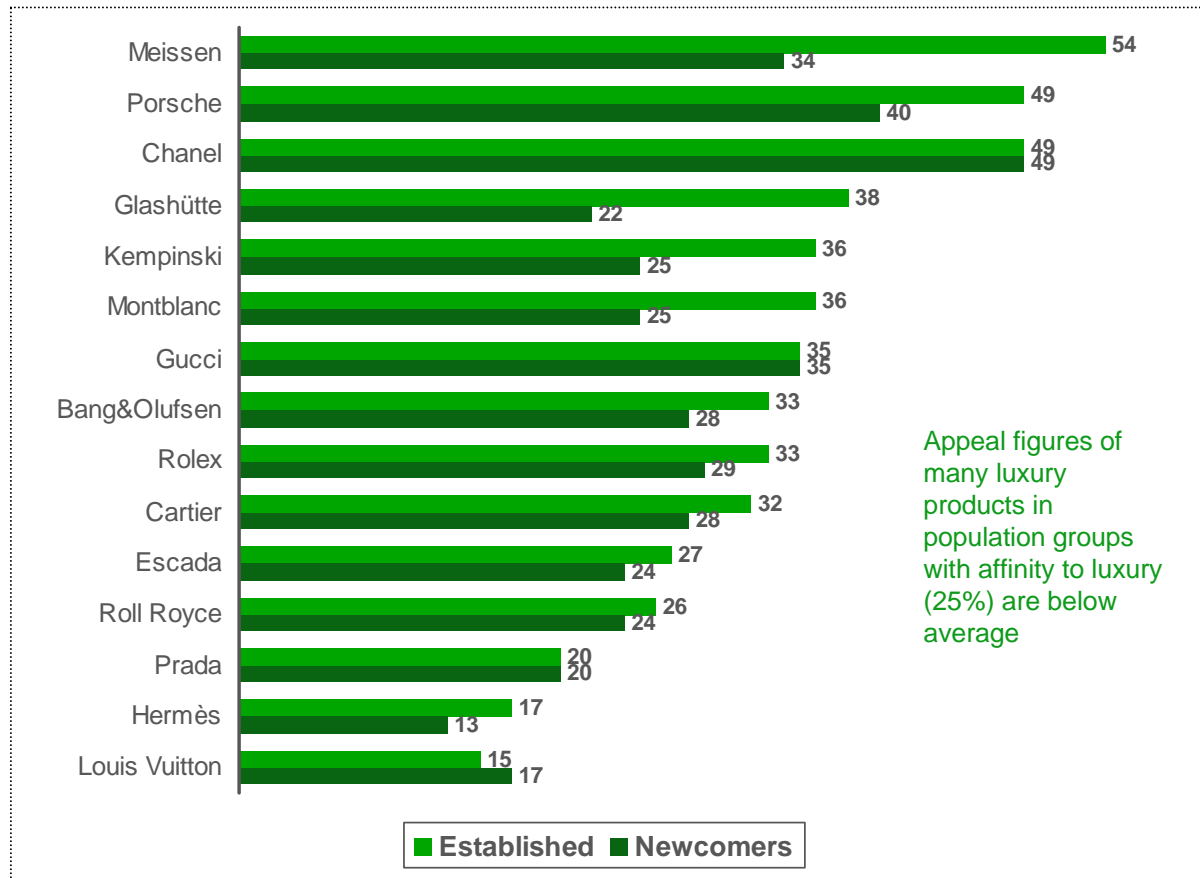
Luxury brand recognition by consumer groups in %



Source: TNS Infratest/KPMG

Other results: Louis Vuitton: 49/42%, Siematic: 50/43%, Bulthaupt: 38/28%, Chronoswiss: 28/24%

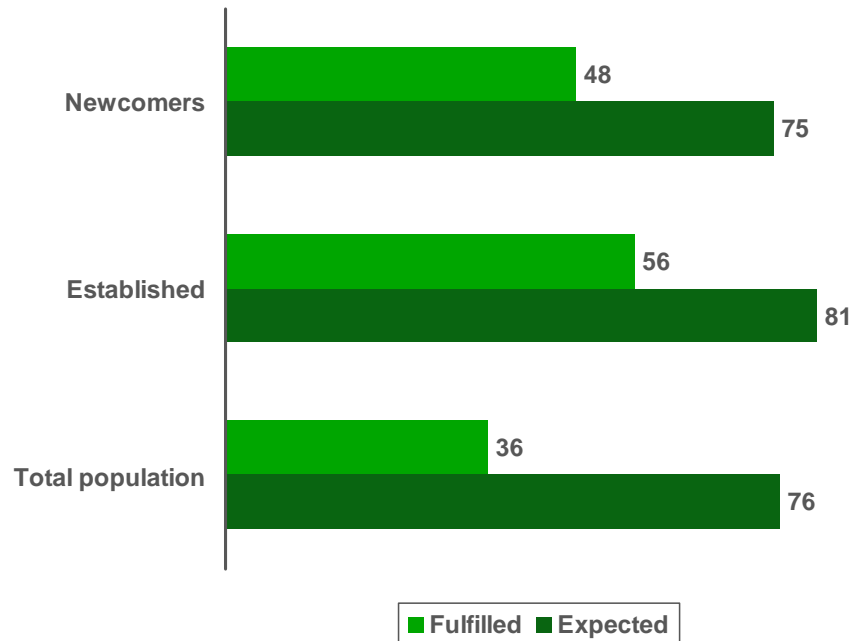
Appeal of luxury brands by consumer groups in %



Source: TNS Infratest/KPMG / Other results: Bulthaupt:14/8%, Chronoswiss: 11/7%

Expectations/trust in corporate responsibility of producers of luxury products

Producers of luxury products still have potential for improving their image regarding corporate responsibility and good corporate citizenship.



Figures in %

Fulfilled: Producers of luxury brands act responsibly.

Expected: “Expect social responsibility and environmentally friendly production by producers of luxury products”

Source: TNS Infratest/KPMG