



**Jewelry Consumer
Opinion CouncilSM**

AGTA Self Purchasing Women **Updated September 24, 2009**

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Introduction & Methodology

The Jewelry Consumer Opinion Council (JCOC) is an Internet-based, niche market research service exclusive to the gem and jewelry industries.

The JCOC is made up of a sampling panel of consumers throughout North America representing all ages, genders, income levels, buying categories and geographic regions. These consumers are quickly accessed via e-mail as each research study is launched.

This report represents the results of a customized study for The AGTA which determines consumer awareness of gemstones and preference for what, when and why they buy gemstone jewelry.

Methodology

The Jewelry Consumer Opinion Council (JCOC) conducted this study for The AGTA beginning on September 18, 2009. As of September 24, 2009, the survey was completed by 1,346 JCOC Panel Members.

In exchange for completing this survey, panel members received one entry into the current JCOC sweepstakes.



Executive Summary

The self purchasing woman has become a powerful consumer force in the marketplace. As a jewelry consumer however, this demographic is largely underexploited and ignored by the broad spectrum of the jewelry industry.

In this JCOC study a significant majority of female self purchasers tell us that in a typical year they will purchase new shoes for themselves between 2-5 times (65%) with an additional 12% saying they will purchase new shoes more than 5 times in a year!

In a typical year the respondents to this study say they will purchase a new dress or clothing outfit for themselves 2-5 times per year (45%) and 29% say more than 5 times per year.

Yet when asked how many times they would purchase jewelry containing colored gemstones or cultured pearls for themselves in a typical year the largest numbers are 1 time (23%), Not sure (19%) and None (23%).

Clearly an opportunity exists for the jewelry industry to market to these self purchasing women particularly in light of the fact that the majority of those shopping for jewelry containing colored gemstones or cultured pearls may be shopping to accessorize a specific fashion outfit.

35% of respondents still purchase jewelry containing colored gemstones or cultured pearls at Local Independent Jewelry Retailers. Yet the barriers presented to these shoppers are clearly defined in the results of this study:

- 57% only sometimes find enough selection and choices
- 61% only sometimes find prices within their budget

and the 3 most important value drivers in importance to these consumers in terms of shopping for this product are:

1. Knowing that the gemstone or pearls in the jewelry are real versus synthetic
2. Having confidence in the person selling me the colored gemstone or pearl jewelry
3. Being able to easily return or exchange a style of colored gemstone or pearl jewelry

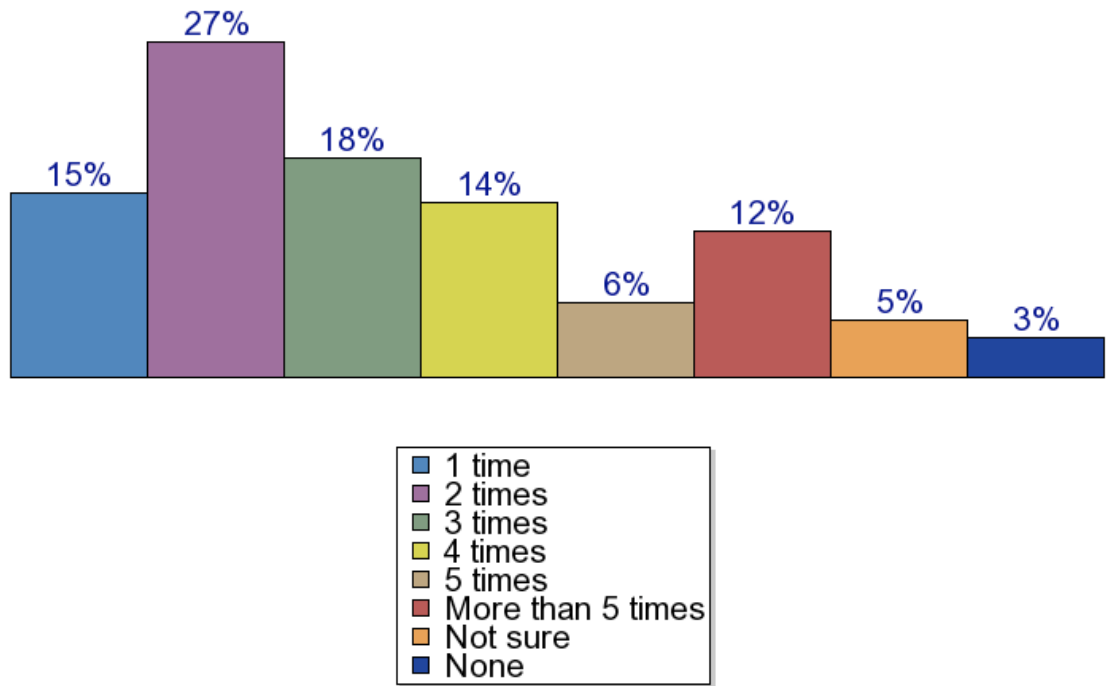
These results point very clearly to increased selection and staff training as two significant action steps that the industry could take to increase sales among self purchasing women.

The impact of increased product variety and sales staff education could be dramatic because respondents clearly show a likelihood to increase their per annum shopping for jewelry containing colored gemstones or cultured pearls if their concerns are addressed.



Typical Purchasing History

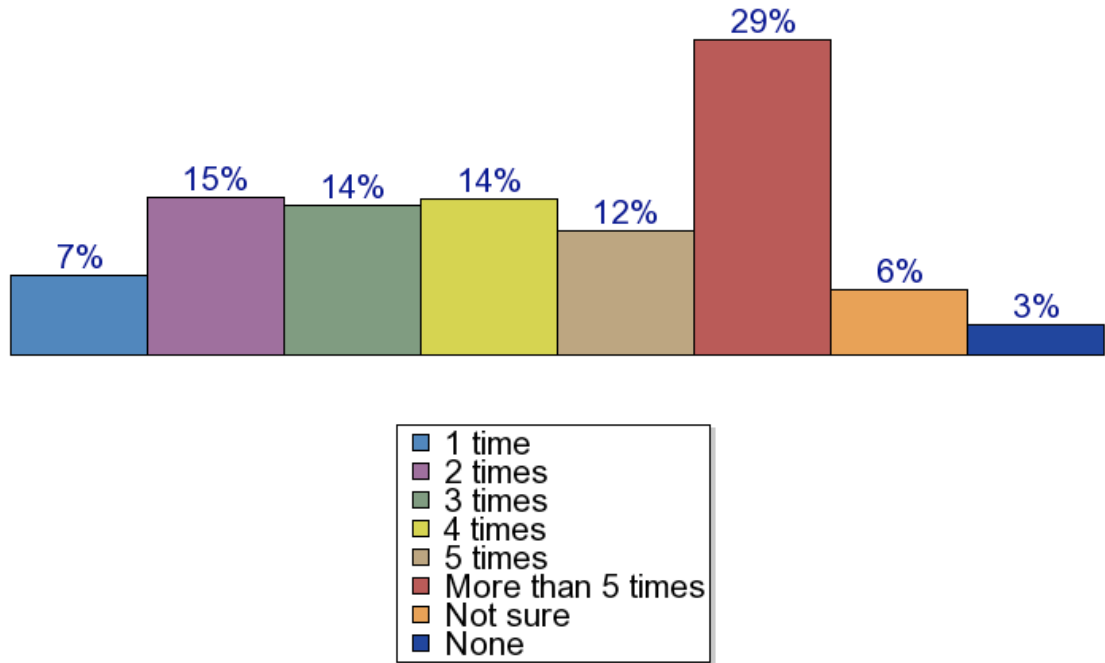
In a typical year (not during a recession) how many times would you purchase new shoes for yourself?



n = 1,347



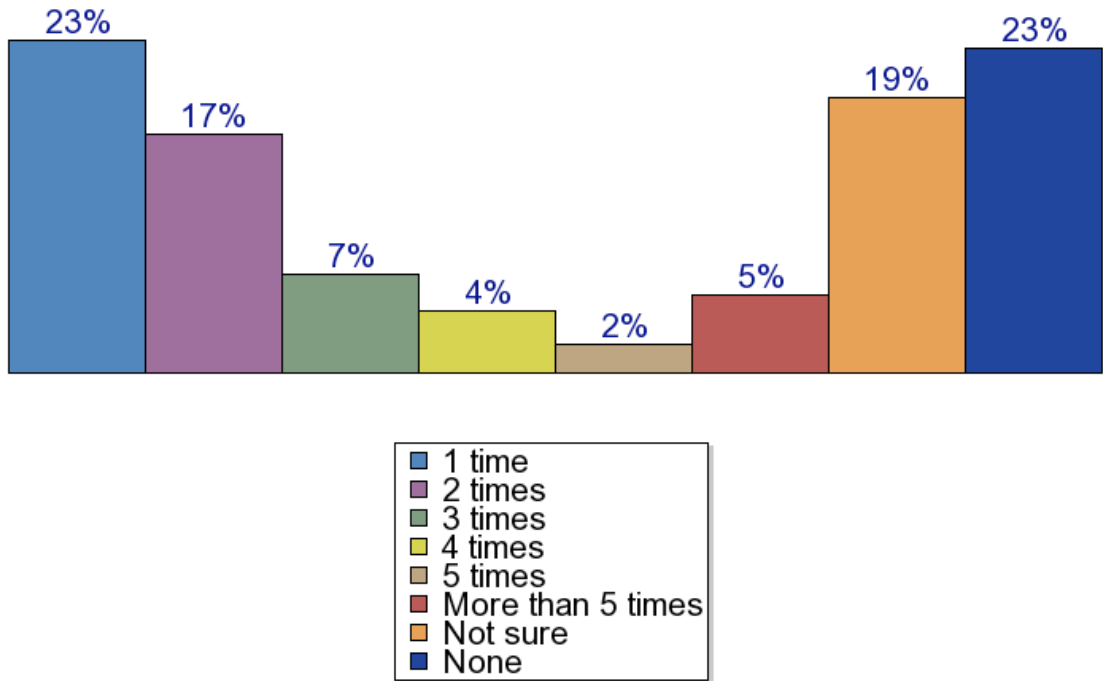
In a typical year (not during a recession) how many times would you purchase a new dress or clothing outfit for yourself?



n = 1,347



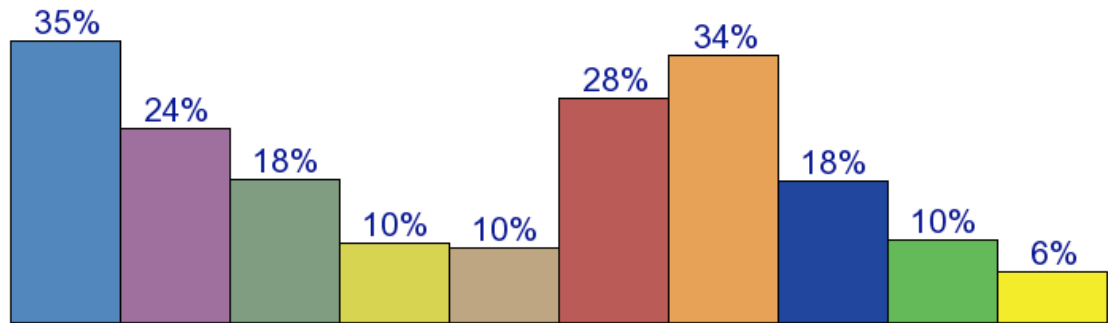
In a typical year (not during a recession) how many times would you purchase jewelry containing colored gemstones or cultured pearls for yourself?



n = 1,347



Where do you typically purchase jewelry containing colored gemstones or cultured pearls?
(Select all that apply)



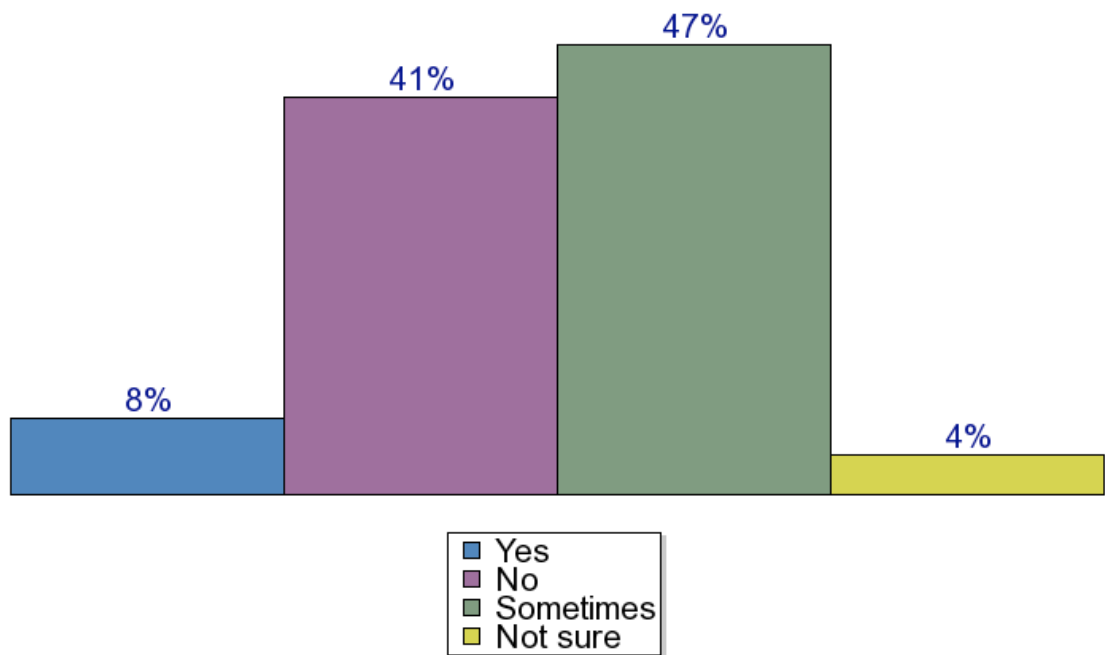
- Local Independent Jewelry Retailer
- National or Regional Chain Store (e.g. Zale, Kay Jewelers, Helzberg Diamonds)
- Television Shopping Channel (e.g. QVC, HSN)
- Internet Only Website Retailer (e.g. BlueNile.com, Ashford.com)
- Shopping Club (e.g. Sam's Club, Costco)
- Mass Discount Store (e.g. Wal-Mart, K-Mart, Target)
- Department Store (e.g. JC Penney, Macy's, Sears)
- Internet Auction Site (e.g. eBay.com, Bidz.com)
- Don't know
- Other

n = 1,347



Product Selection Process

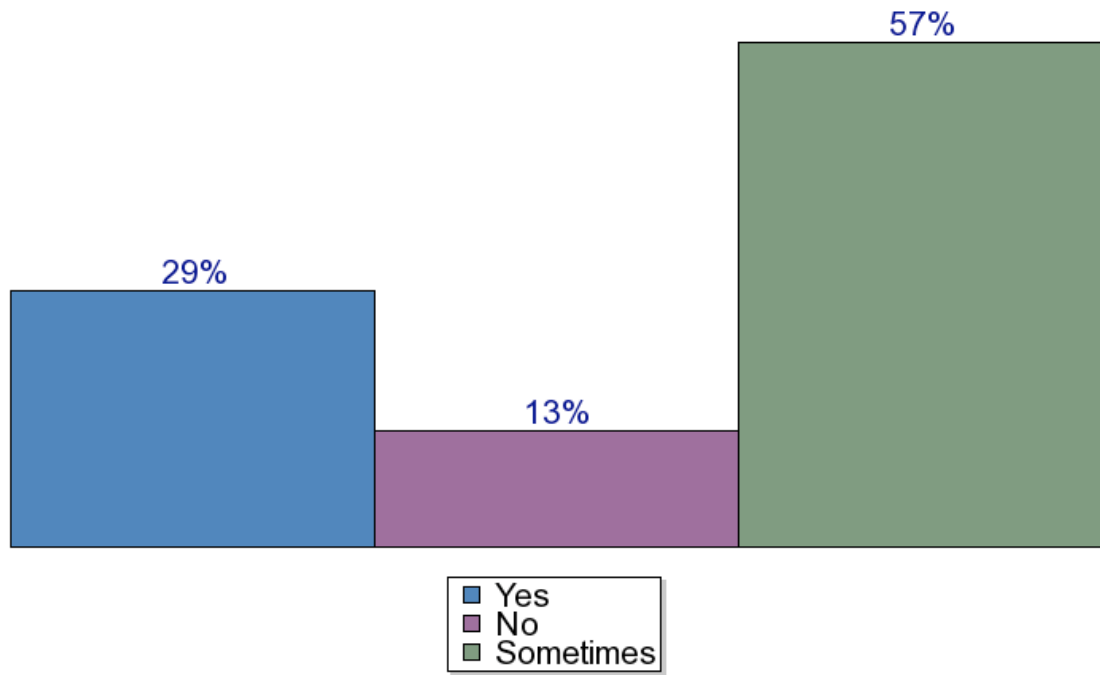
When you shop for jewelry containing colored gemstones or cultured pearls are you shopping to accessorize a specific fashion outfit or look?



n = 1,347



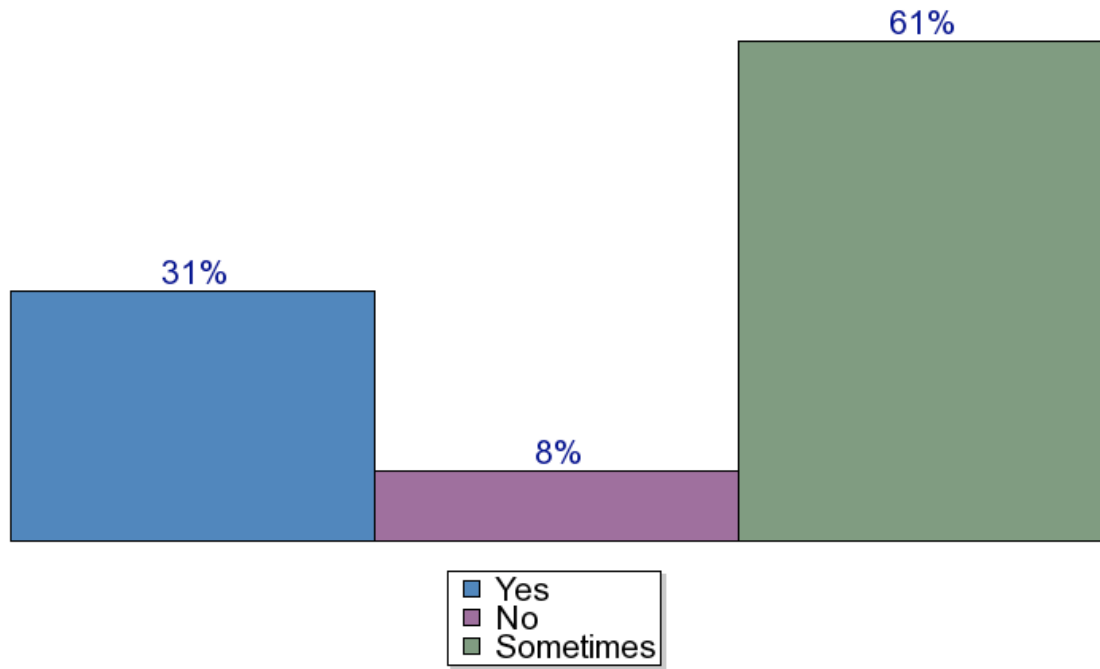
When you shop for jewelry containing colored gemstones or cultured pearls, to accessorize a fashion outfit or look, do you find enough selection and choices?



n = 790



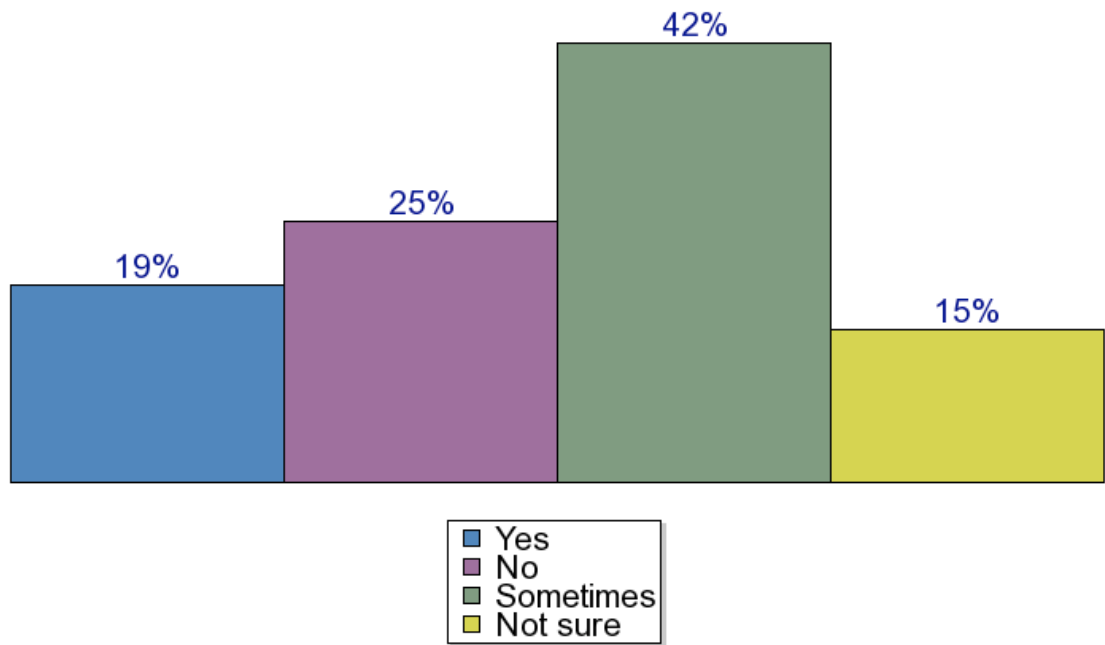
When you shop for jewelry containing colored gemstones or cultured pearls, to accessorize a fashion outfit or look, do you find prices within your budget?



n = 790



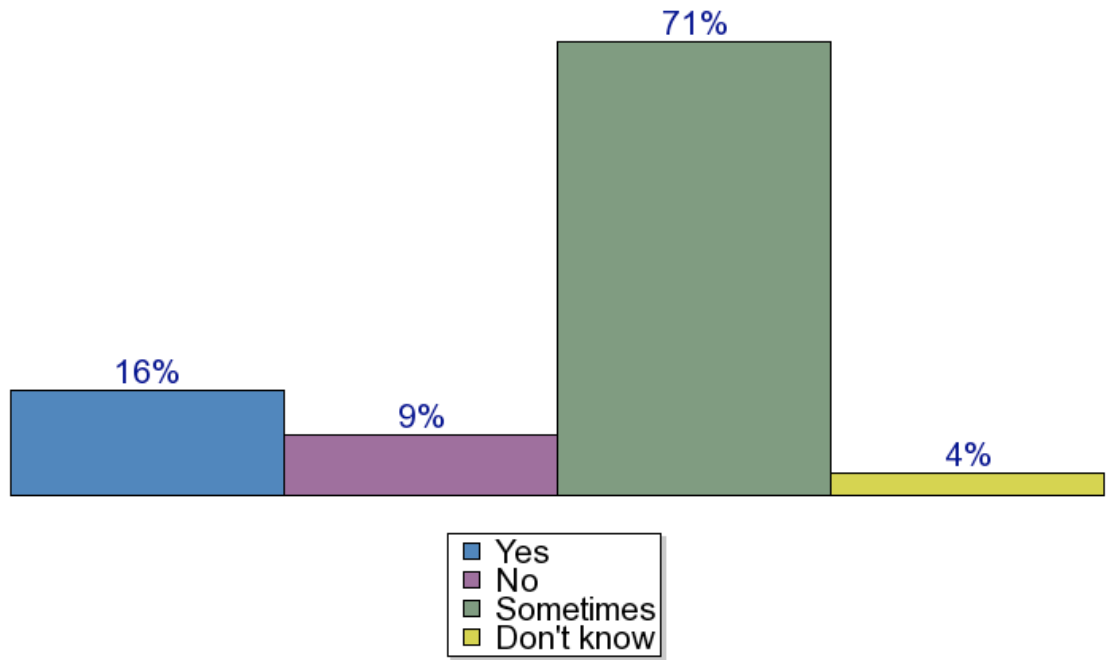
When you shop for jewelry containing colored gemstones or cultured pearls, to accessorize a fashion outfit or look, do you consider a local independent jewelry store as a good place to receive fashion advice when accessorizing an outfit?



n = 790



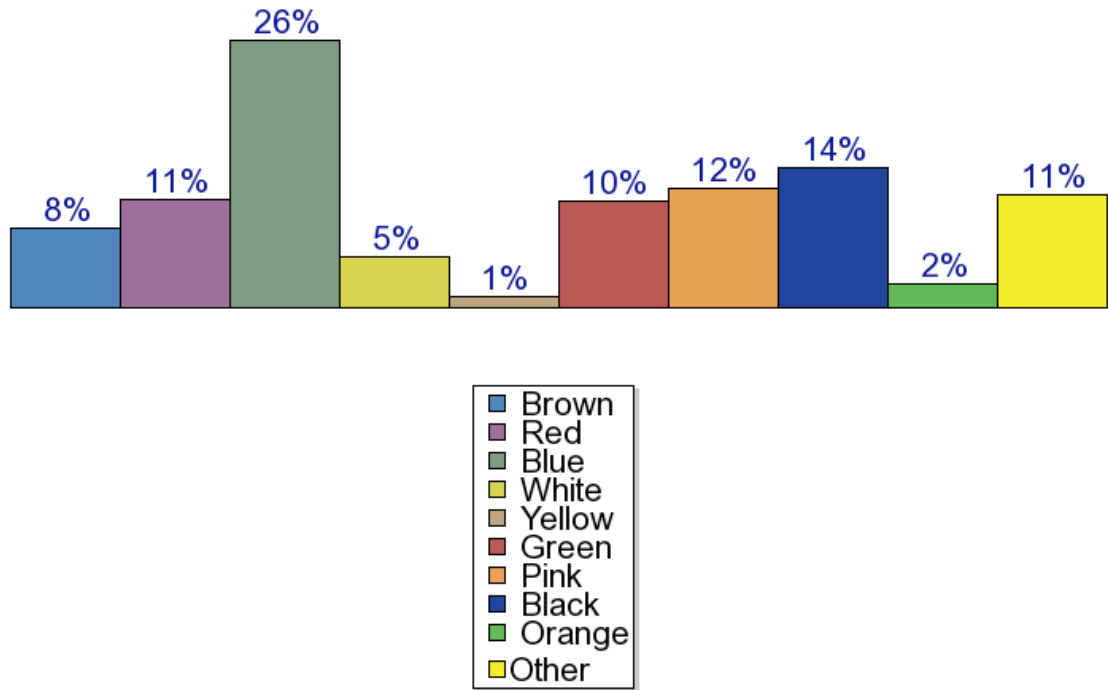
When you shop for jewelry containing colored gemstones or cultured pearls, to accessorize a fashion outfit or look, are you shopping to match a particular color?



n = 790



Which family of colors have you most recently been shopping to match when you shop for jewelry containing colored gemstones or cultured pearls, to accessorize a fashion outfit or look?



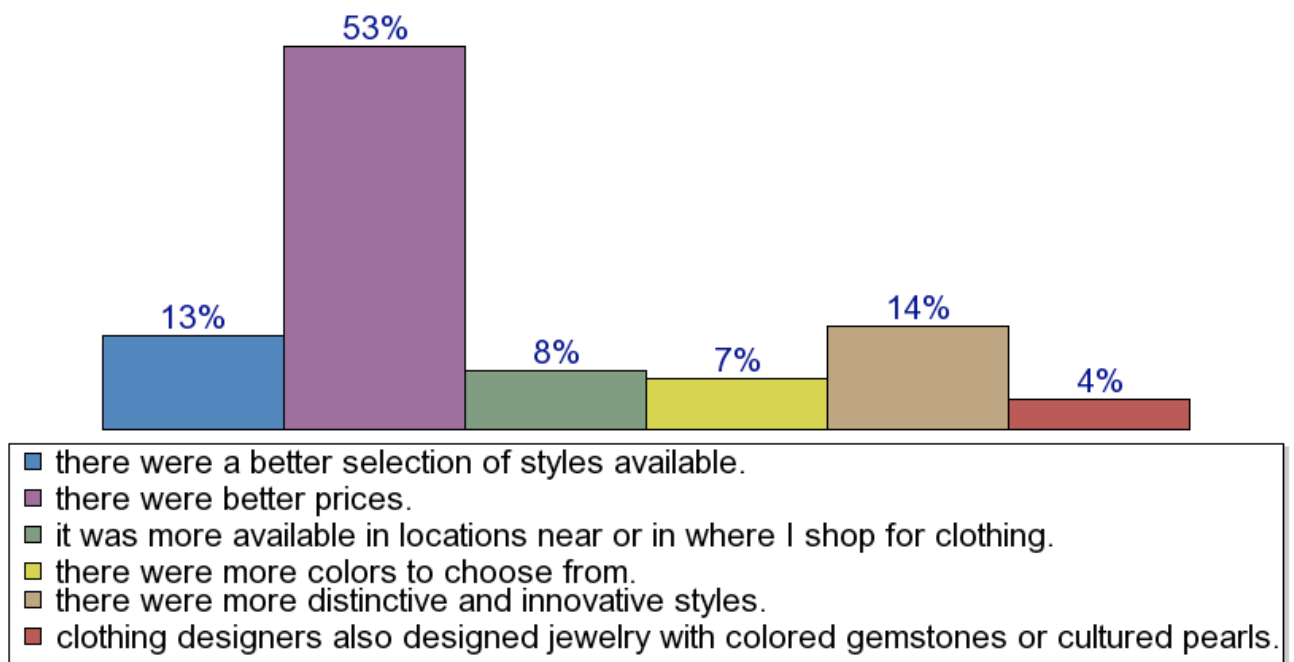
n = 715



Would You Purchase More?

Please complete the following sentence with the ONE answer that you agree with MOST;

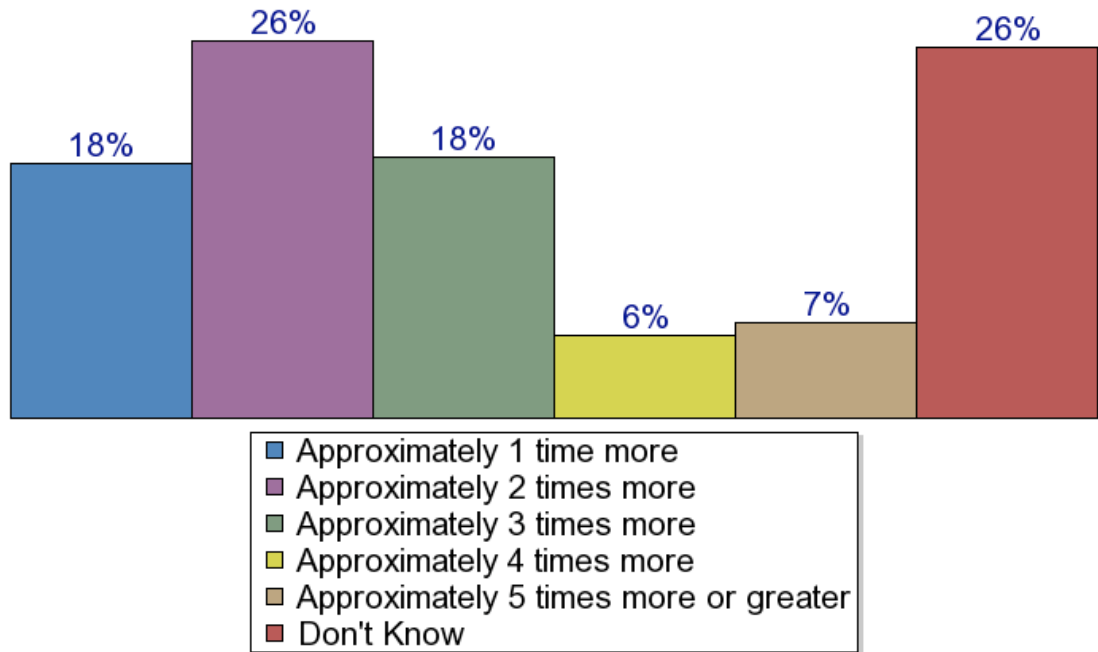
"I would shop for more jewelry containing colored gemstones or cultured pearls, to accessorize a fashion outfit or look, if"



n = 790



Based on your previous answer, if your concerns were addressed, how many more times would you shop for jewelry containing colored gemstones or cultured pearls to accessorize a fashion outfit or look a 12-month period.

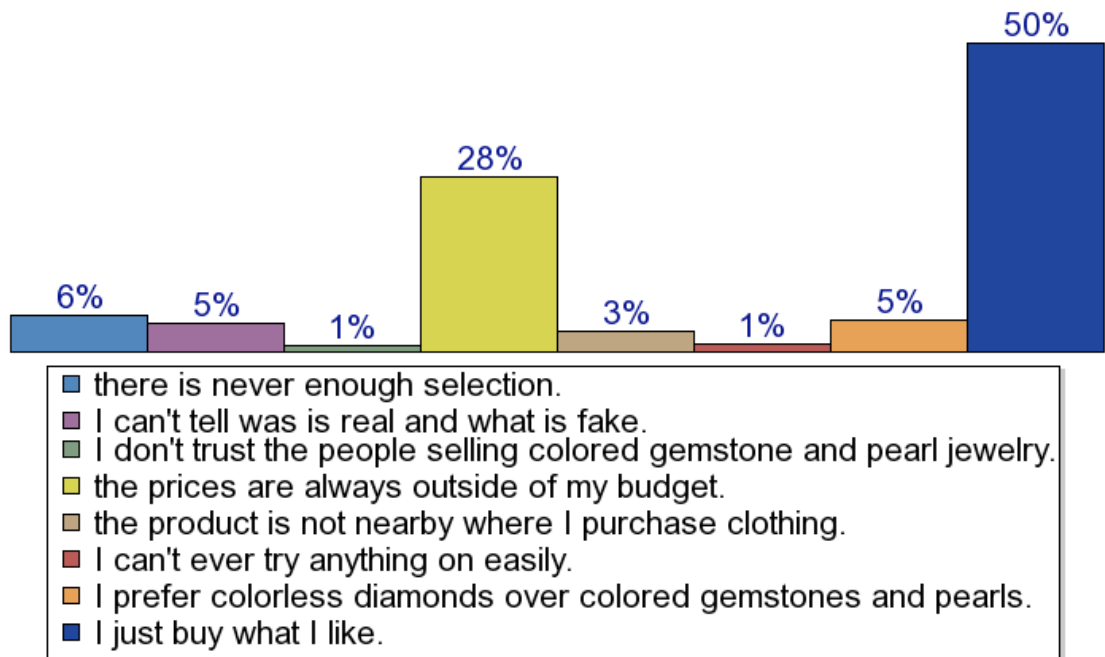


n = 790



Please complete the following sentence with the ONE answer that you agree with most.

"I don't shop for jewelry containing colored gemstones or cultured pearls, to accessorize a fashion outfit or look because"

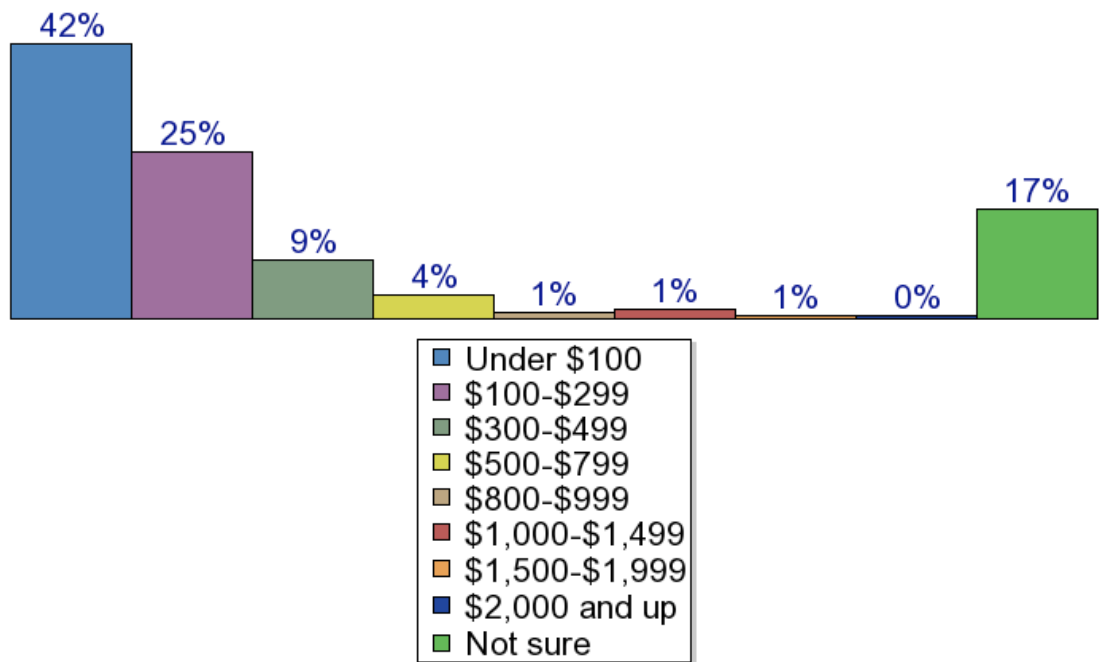


n = 1,347



Spending on Colored Gemstones Jewelry

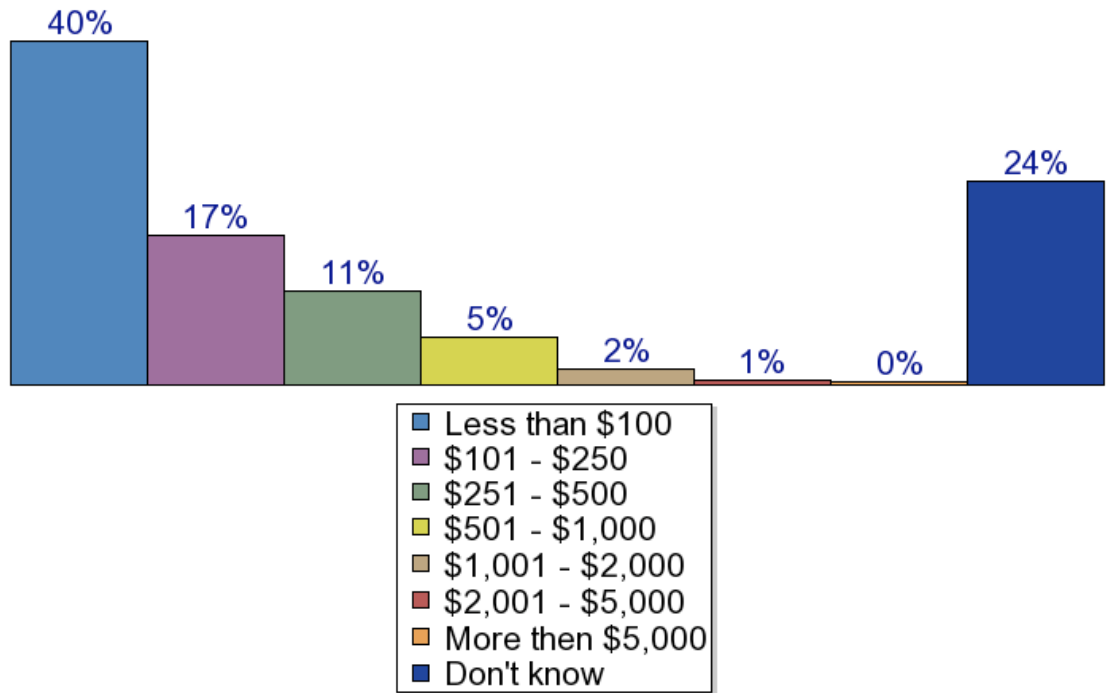
In a typical year (not during a recession) how much would you likely spend on a SINGLE purchase of jewelry containing colored gemstones or cultured pearls for yourself?



n = 1,347



Please estimate your TOTAL planned spending on colored gemstone and cultured pearl jewelry in the NEXT 12 months.

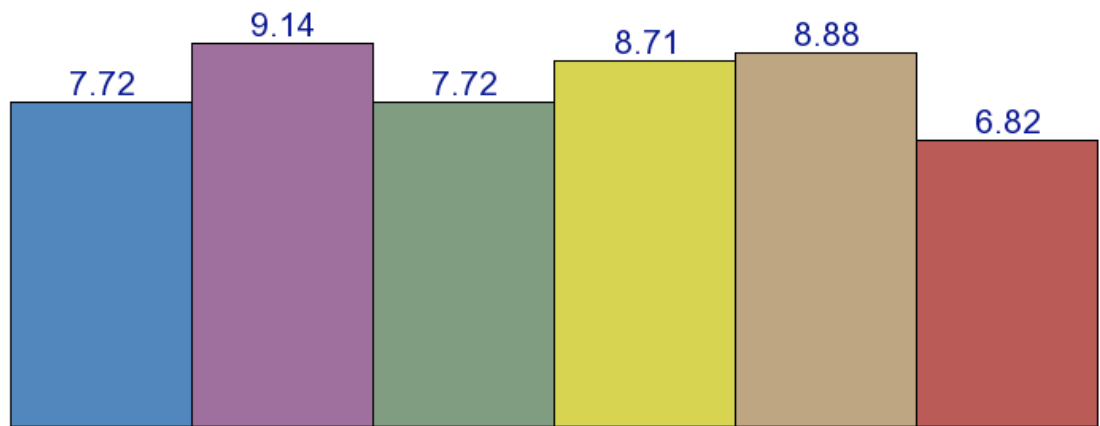


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Importance of Colored Gemstone Jewelry

Please rate each of the following in terms of their importance to you as a shopper with 0 being not important at all and 10 being extremely important



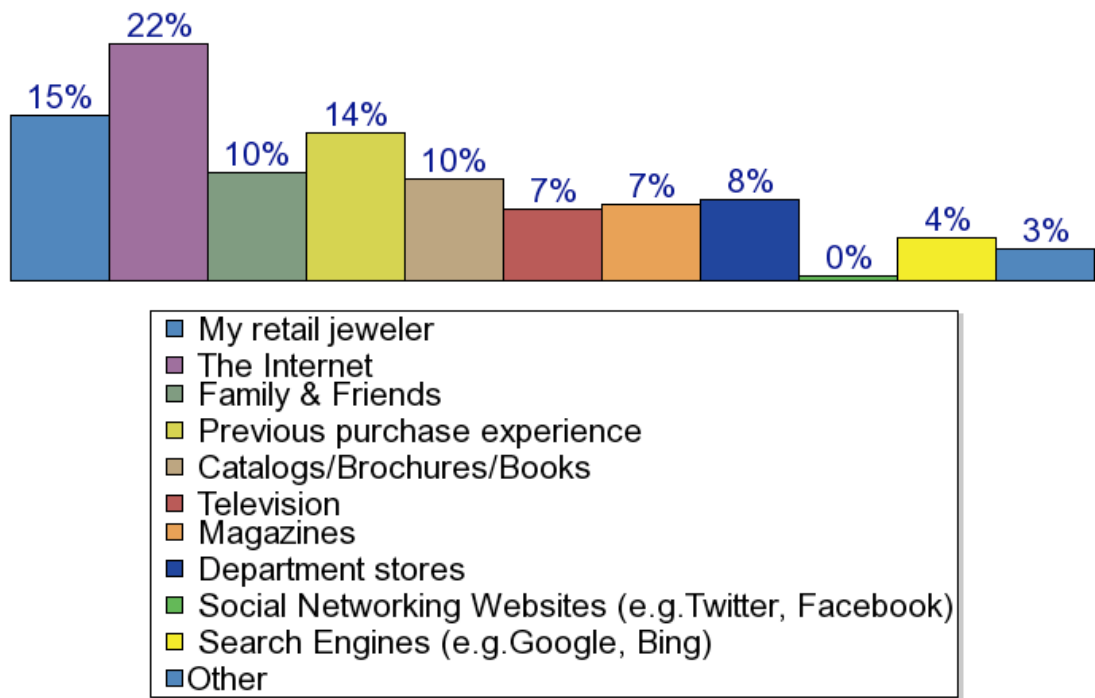
- A certificate of authenticity for the colored gemstone or pearl jewelry
- Knowing that the gemstone or pearls in the jewelry are real versus synthetic
- Buying gemstone or pearl jewelry from a well known retailer
- Being able to easily return or exchange a style of colored gemstone or pearl jewelry
- Having confidence in the person selling me the colored gemstone or pearl jewelry
- Knowing that the person selling me the colored gemstone or pearl jewelry understands my fas...

n = 1,347



Information About Gemstone Jewelry

Where do you receive most of your information about styles, quality and prices regarding jewelry containing colored gemstone and cultured pearls? (Select only one)

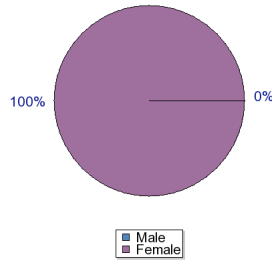


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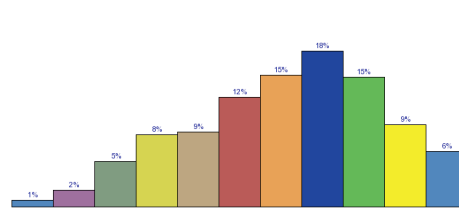
Demographics

What is your gender?



n = 1,347

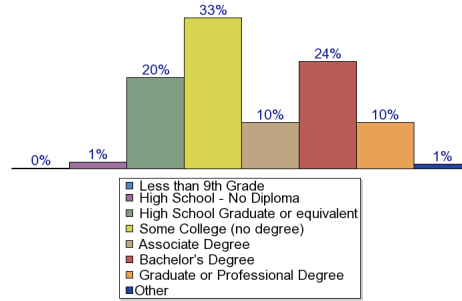
What is your age group?



n = 1,347

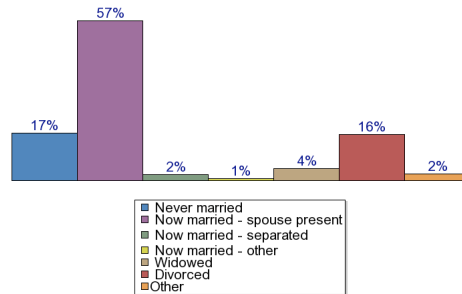


What is your level of education?



n = 1,347

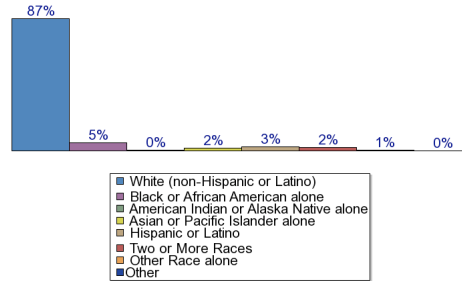
What is your current marital status?



n = 1,347

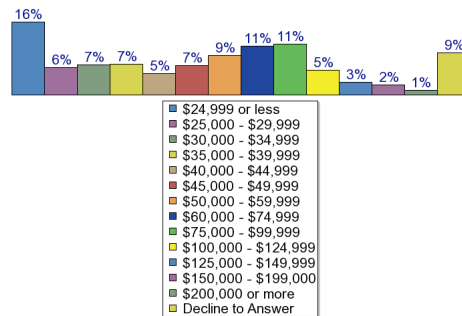


What is your race/ethnicity?



n = 1,347

What is your annual household income range before taxes?



n = 1,347



About JCOC

The JCOC is confident the information included in this report is of interest and value to you. If you would like to learn more about the JCOC, please contact us to set up a web meeting. There are numerous benefits to JCOC research and we encourage you to consider some of our additional services:

- Consumer preference & behavior evaluation
- Premium opportunity testing
- Product challenge & opportunity testing
- New communication concept testing
- Brand equity evaluation
- Competitive assessment
- Market size and market share quantification
- Much more!

Just to give you a little more information about us:

- MVI (JCOC's parent company) is NOT just a research company. Our value adding is our industry experience and wisdom.
- MVI puts 20 years of jewelry industry market research, market intelligence and strategic analysis to work for you with the JCOC.
- MVI will work with you to define your information needs and sure you ask the right questions of the right people.
- MVI will develop your JCOC study questionnaires, gather your data, prepare your analysis and present a detailed report for you.
- Most JCOC studies are completed within 3 weeks time. MVI provides cross tabulations and analysis for a reduced cost with every project.

Please contact Marty Hurwitz to learn more!

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