



JAPANESE WATCH MARKET SURVEY of Consumers' Consciousness 2006

(Translation of the original report in Japanese)

Federation of the Swiss Watch Industry FH, Tokyo Center made a survey of the consumers' consciousness and their purchasing attitudes of wristwatches on consumers who have interests in watches. The survey was outsourced Teikoku Data Bank Co, and conducted from February 6 to 17 on internet research.

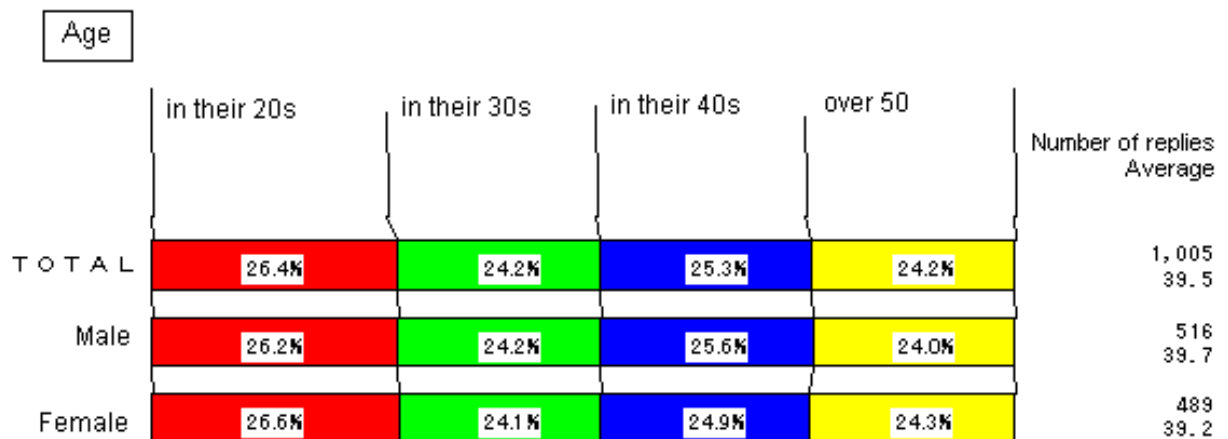
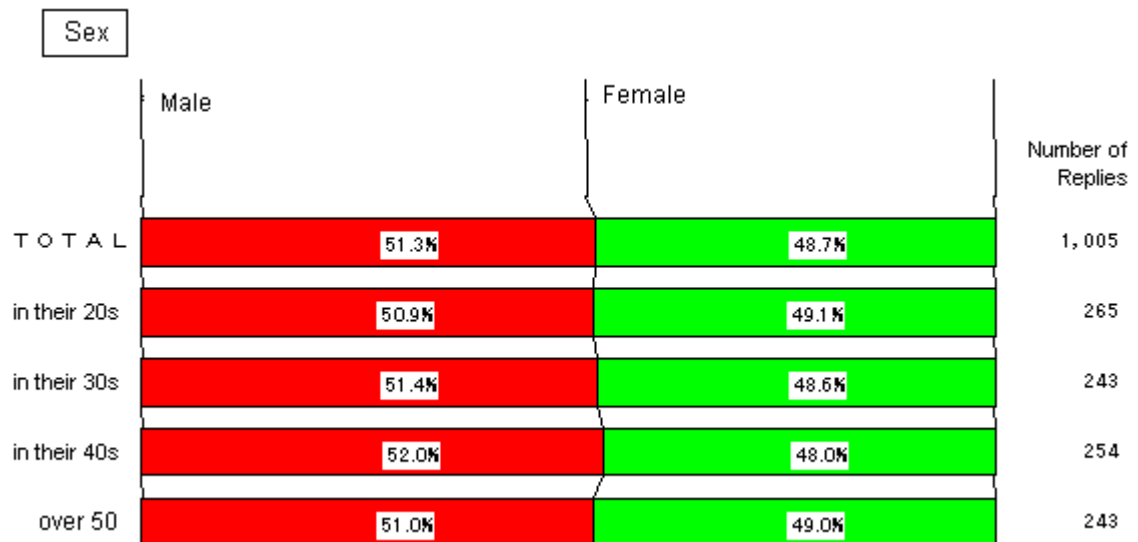
Survey area	Whole of Japan
Survey method	Internet research (web research)
Sampling	Research monitors (outsource)
Survey on	1. Male and female over 20 years old, and 2. having interests in wristwatches (screening out monitors who have interests in watches of more than Yen100,000.)
Replies collected	1,005

Sex / Age	TOTAL	in their 20s	in their 30s	in their 40s	Over 50
TOTAL	1005	265	243	254	243
Male	516	135	125	132	124
Female	489	130	118	122	119

Survey period February 6 (Mon) – 17 (Fri), 2006



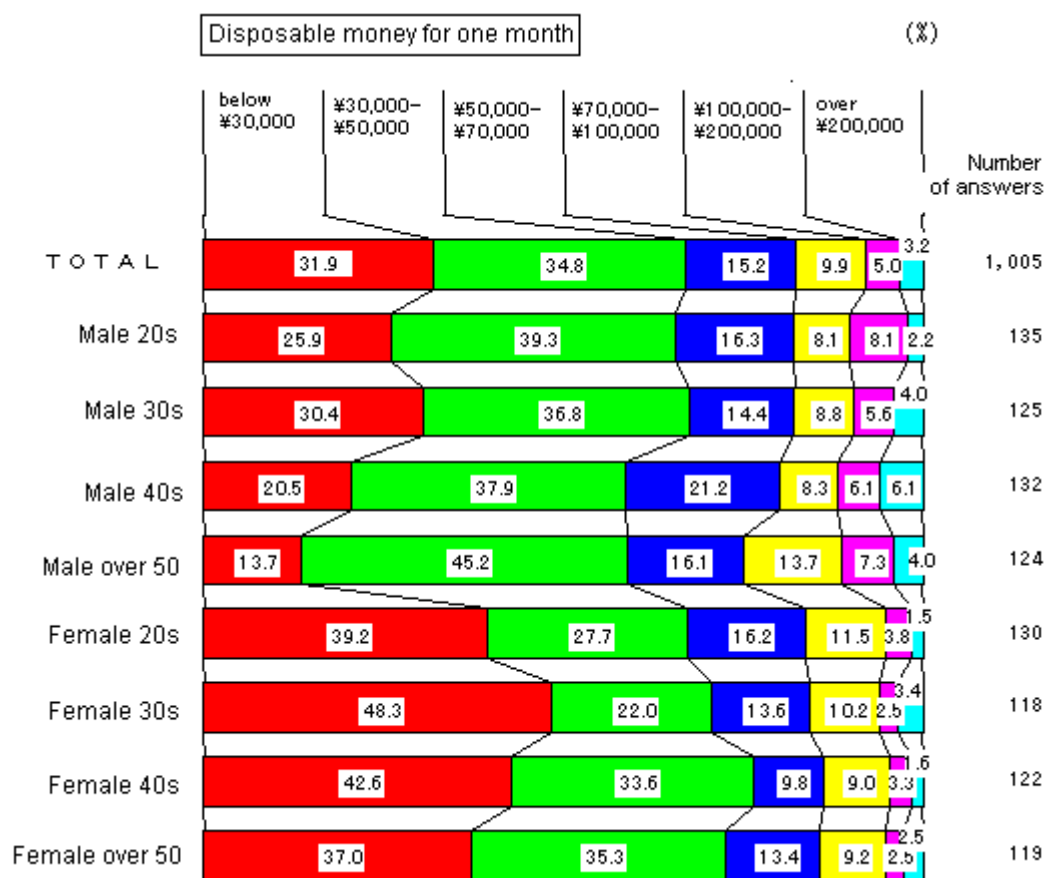
Sex / Age





Pocket money disposable for one month – 67% said it is “below Yen50,000”

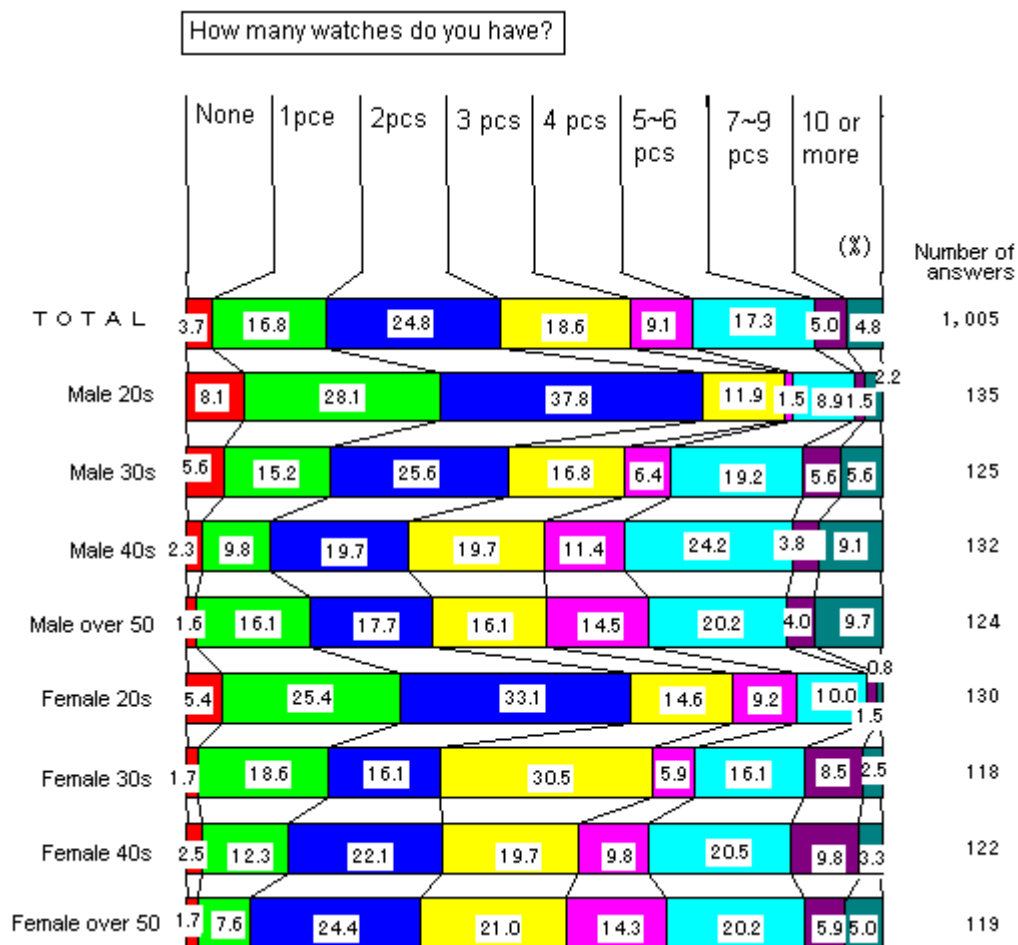
To a question asking the pocket money disposable for one month, 31.9% answered “below Yen30,000”, and 34.8% answered “between Yen30,000 and 50,000”. Below Yen 50,000 totals 67% of the total, and “Over 100,000” is 8.2%.





How many watches are owned

16.8% of consumers own 1 watch, and 24.8% own 2 watches. Consumers having more than 3 watches are 54.8% of the total. 4.8% of consumers have “more than 10 watches”.

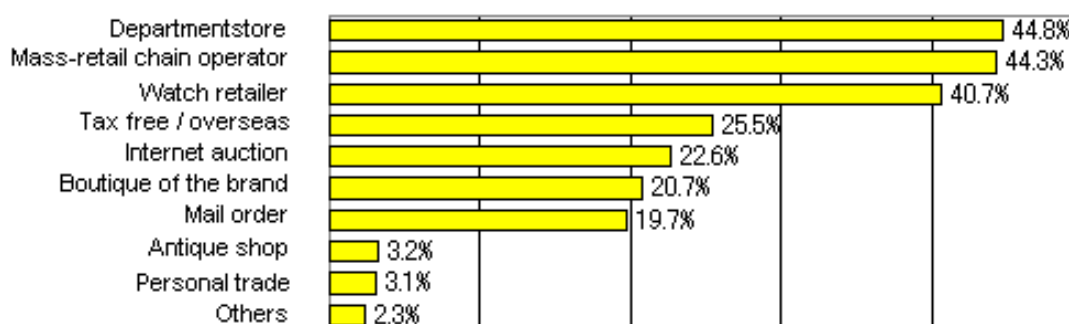




Where to buy watches

“Department store “ is the most place where consumers go to buy watches. It is followed by “ Watch retailers” , and “Mass-retail chain operator”.

(Multiple answers)



Where to buy	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Department stores	44.8%	36.3%	39.2%	37.1%	31.5%	65.4%	52.5%	48.4%	48.7%
Mass-retail chain operator	44.3%	39.3%	49.6%	62.9%	56.5%	26.9%	39.0%	41.0%	38.7%
Watch retailer	40.7%	44.4%	48.0%	45.5%	44.4%	30.8%	38.1%	35.2%	38.7%
Tax fee/overseas	25.5%	8.1%	19.2%	26.5%	25.8%	24.6%	27.1%	38.5%	36.1%
Internet auction	22.6%	20.7%	22.4%	40.2%	22.6%	15.4%	20.3%	19.7%	18.5%
Boutique of the brand	20.7%	22.2%	12.0%	10.6%	8.9%	36.2%	33.9%	18.9%	23.5%
Mail order	19.7%	21.5%	24.0%	32.6%	12.9%	13.8%	11.0%	22.1%	18.5%
Antique shop	3.2%	2.2%	7.2%	6.1%	3.2%	2.3%	2.5%	0.8%	0.8%
Personal trade	3.1%	1.5%	4.0%	6.8%	3.2%	1.5%	3.4%	1.6%	2.5%
Others	2.3%	4.4%	0.8%	0.8%	0.8%	3.1%	4.2%	2.5%	1.7%



Watch retailers they go to

The consumers who go to “Watch retailers” to buy watches are asked the name of the shop. “Evince”(*) came top, and followed by “Watchman” and “Wako”.

(Free answer)

	Shop name	replies	%		Shop name	replies	%
1	Evince	22	5.4%	21	Sakuraya	2	0.5%
2	Watchman	14	3.4%	21	Satindoll	2	0.5%
2	Wako	14	3.4%	21	Jewelry Paris	2	0.5%
4	Rolex	13	3.2%	21	Seiko	2	0.5%
5	Hattori Tokeiten	9	2.2%	21	Tag Heuer	2	0.5%
6	Local chops	8	2.0%	21	Tamiya	2	0.5%
7	TicTac	7	1.7%	21	Big Camera	2	0.5%
7	Mondiale	7	1.7%	21	Yoshida Tokei	2	0.5%
9	Swatch	6	1.5%	21	Mitsukoshi	2	0.5%
10	BEST	5	1.2%	21	Jihodo	2	0.5%
10	Yodobashi Camera	5	1.2%	21	Ono Tokei-ten	2	0.5%
10	Tenshodo	5	1.2%	21	Shobido	2	0.5%
13	Omega	4	1.0%	21	Daimaru	2	0.5%
14	ami	3	0.7%	21	Onishi Tokeiten	2	0.5%
14	SEIKO	3	0.7%	21	Hirano	2	0.5%
14	Quoak	3	0.7%	21	Hoseki Hiroba	2	0.5%
14	Naniwa	3	0.7%	21	Aso Tokei-ten	2	0.5%
14	Marui	3	0.7%		Others	158	38.6%
14	Takashimaya	3	0.7%		No idea, Not decided	75	18.3%
14	Terauchi	3	0.7%				
21	Omega shop	2	0.5%		TOTAL	409	100.0%

(*) Evince – A retail shop opened in 1987 at Aoyama(Tokyo) for retailing of parallel imported Rolex watches. They placed big advertisements on TV and magazines.

At present they have two shops, one in Ginza/Tokyo (5 stories building) and at Shibuya/Tokyo (4 stories building). In 2002, they started to sell not only Rolex but also Cartier, Patek Philippe, Franck Muller, Chopard, Audemars Piguet, Piaget, Breguet, Jaeger LeCoultre, Omega, Vacheron Constantin parallel imported.

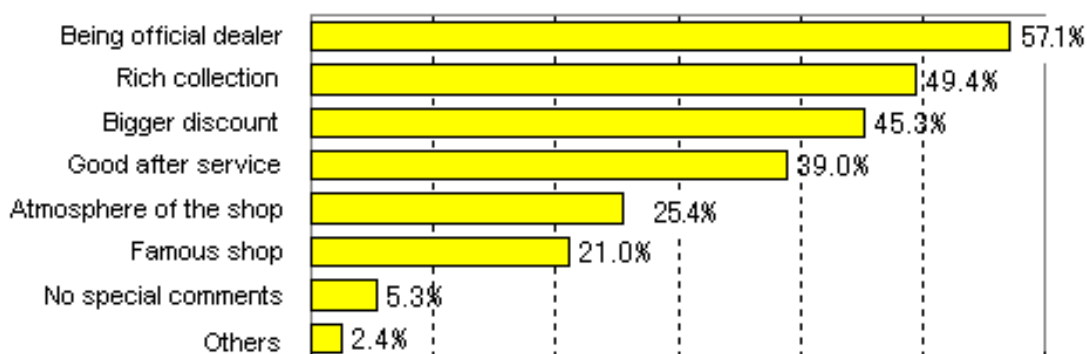
In 2003, they started to sell Tag Heuer and Ikepod supplied by the official distributors, but other brands are all parallel import.



Important factors to take into consideration when selecting shops to buy watches

57% of consumers answered that they take into consideration if the shop is an official dealer or not. That is more than the “Rich collection” or “Bigger discount”.

(Multiple answer)

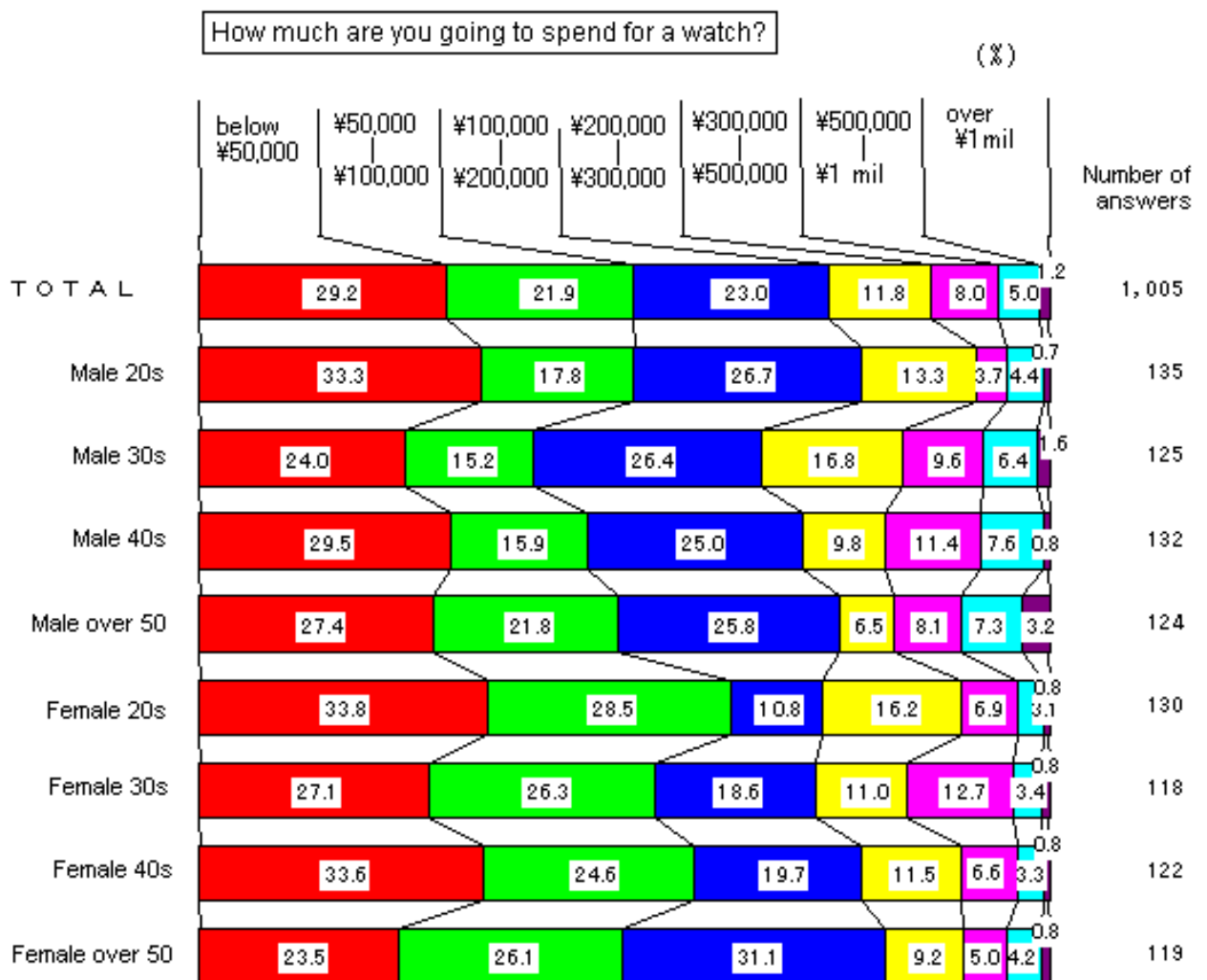


	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Total of replies	1,005	135	125	132	124	130	118	122	119
Being official dealer	57.1%	51.9%	57.6%	50.8%	51.6%	61.5%	69.5%	54.9%	60.5%
Rich collection	49.4%	41.5%	44.0%	47.0%	54.8%	51.5%	56.8%	50.8%	49.6%
Bigger discount	45.3%	52.6%	50.4%	64.4%	52.4%	31.5%	37.3%	39.3%	31.9%
Good after service	39.0%	34.1%	37.6%	37.1%	37.1%	39.2%	40.7%	41.0%	46.2%
Atmosphere of the shop	25.4%	28.9%	20.8%	18.9%	14.5%	32.3%	33.9%	27.0%	26.9%
Famous shop	21.0%	22.2%	22.4%	19.7%	16.1%	28.5%	19.5%	16.4%	22.7%
No special comments	5.3%	3.0%	3.2%	2.3%	8.9%	6.2%	3.4%	8.2%	7.6%
Others	2.4%	3.0%	2.4%	3.8%	0.8%	2.3%	2.5%	2.5%	1.7%



Amount they are ready to pay for a watch

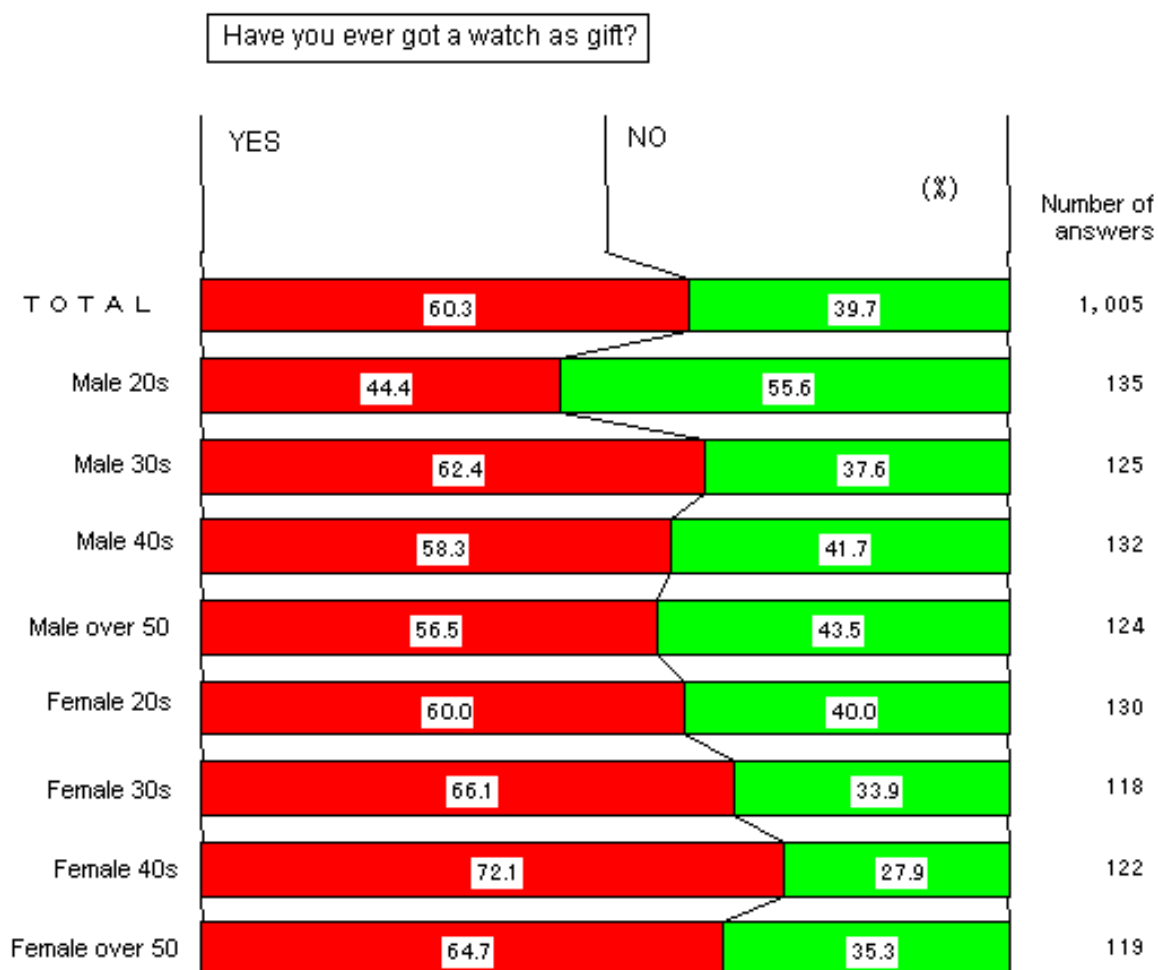
26.6% of consumers are willing to buy watches more than Yen200,000. 14.2% for more than Yen300,000, and more than Yen 1,000,000 is 1.2% of consumers. There does not show any big difference by age. Even younger generation is willing to buy expensive watches.





Watch as gift

60.3% of consumers have ever received watches as gift. Male in their 20s has the smallest experience, and it is only 44.4%.

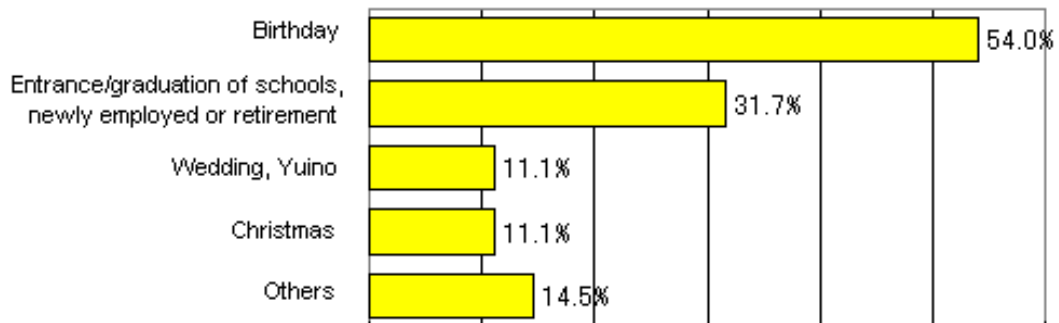




In which occasion they got a gift of watch

Asked when it was to the repliers who have ever received gifts of watches.

(Multiple answer)



Gift for	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	606	60	78	77	70	78	78	88	77
Birthday	54.0%	50.0%	64.1%	41.6%	45.7%	53.8%	70.5%	58.0%	45.5%
Entrance/graduation of Schools, newly employed Or retirement	31.7%	40.0%	17.9%	42.9%	38.6%	29.5%	24.4%	35.2%	27.3%
Wedding, Yuino(*)	11.1%	10.0%	17.9%	23.4%	8.6%	3.8%	6.4%	10.2%	7.8%
Christmas	11.1%	10.0%	9.0%	5.2%	4.3%	19.2%	15.4%	14.8%	9.1%
Others	14.5%	11.7%	6.4%	10.4%	18.6%	15.4%	6.4%	20.5%	26.0%

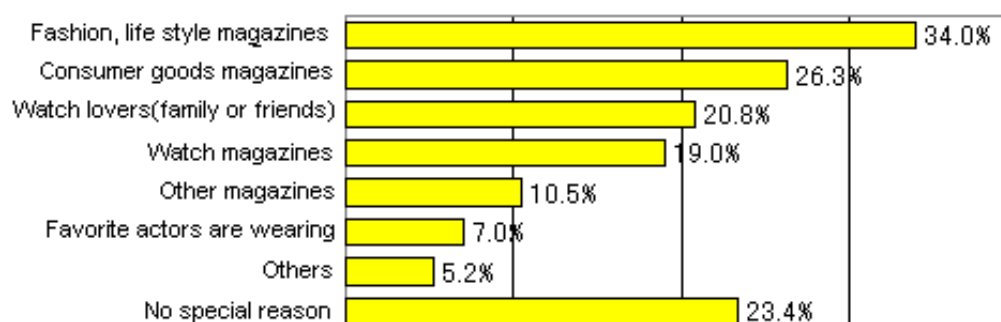
(*) Yuino : Japanese traditional custom to exchange betrothal presents when engaged marriage.



How they started to have interests in watches

Females are mostly influenced by fashion magazines, and males are mostly influenced by life style magazines at beginning.

(Multiple answer)



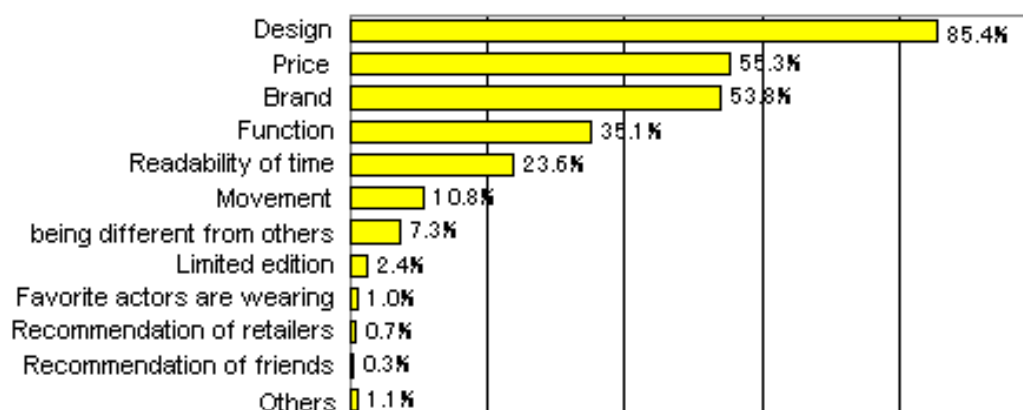
Influenced by	TOTAL	Male				Female			
		20s	30s	40s	Over50	20s	30s	40s	Over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Fashion, life style magazines	34.0%	37.8%	17.6%	17.4%	4.8%	66.9%	49.2%	43.4%	35.3%
Consumer goods magazines	26.3%	23.7%	42.4%	39.4%	28.2%	16.2%	22.0%	16.4%	21.0%
Watch lovers (family or friends)	20.8%	15.6%	18.4%	20.5%	19.4%	20.8%	23.7%	21.3%	27.7%
Watch magazines	19.0%	20.7%	40.8%	31.8%	23.4%	5.4%	9.3%	9.8%	9.2%
Other magazines	10.5%	9.6%	10.4%	9.1%	12.9%	10.8%	10.2%	12.3%	9.2%
Favourite actors are wearing	7.0%	6.7%	4.0%	2.3%	2.4%	13.1%	11.0%	8.2%	8.4%
Others	5.2%	4.4%	7.2%	6.8%	5.6%	4.6%	6.8%	4.9%	0.8%
No special reason	23.4%	30.4%	18.4%	19.7%	37.1%	15.4%	16.9%	23.0%	26.1%



Important factors to take into consideration selecting watches

Consumers take into consideration the “Design”, “Price” and “Brand”. Males in their 40s and over 50 years old take also “Function” into consideration.

(3 selections)



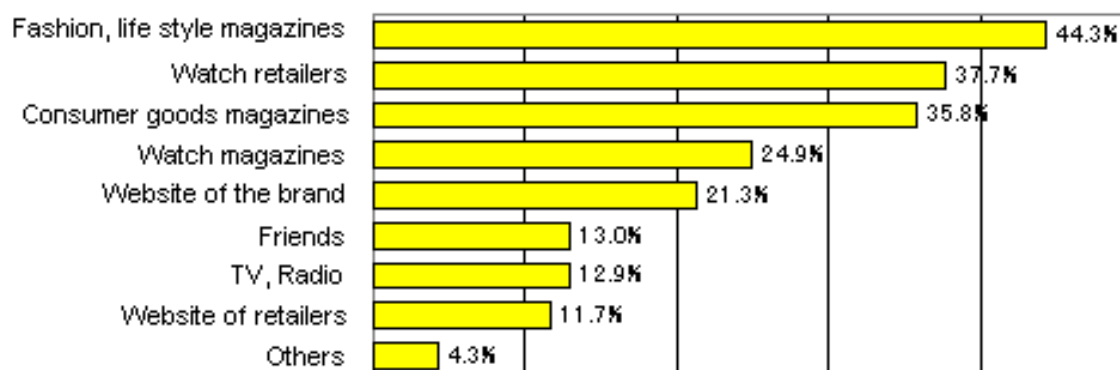
Important factor	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Design	85.4%	83.7%	87.2%	78.0%	70.2%	95.4%	93.2%	88.5%	87.4%
Price	55.3%	49.6%	55.2%	51.5%	54.0%	58.5%	57.6%	59.8%	57.1%
Brand	53.8%	63.0%	50.4%	55.3%	46.0%	55.4%	60.2%	52.5%	47.1%
Function	35.1%	34.1%	43.2%	46.2%	47.6%	28.5%	17.8%	35.2%	26.9%
Readability of time	23.6%	15.6%	10.4%	12.9%	23.4%	27.7%	28.8%	27.9%	44.5%
Movement	10.8%	14.1%	22.4%	12.9%	18.5%	2.3%	5.9%	5.7%	4.2%
being different from others	7.3%	7.4%	8.8%	7.6%	4.8%	6.9%	9.3%	4.1%	9.2%
Limited edition	2.4%	1.5%	5.6%	6.8%	2.4%	0.0%	0.8%	0.8%	0.8%
Favorite actors are wearing	1.0%	0.0%	0.0%	0.8%	0.0%	4.6%	1.7%	0.8%	0.0%
Recommendation of retailer	0.7%	0.0%	0.0%	0.8%	0.8%	0.8%	0.8%	0.0%	2.5%
Recommendation of friends	0.3%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.8%
Others	1.1%	0.7%	0.0%	2.3%	0.8%	0.8%	0.8%	1.6%	1.7%



Major source of information for watches

Not only females but also males in their 20s collect information from fashion magazines.

(Multiple answer)



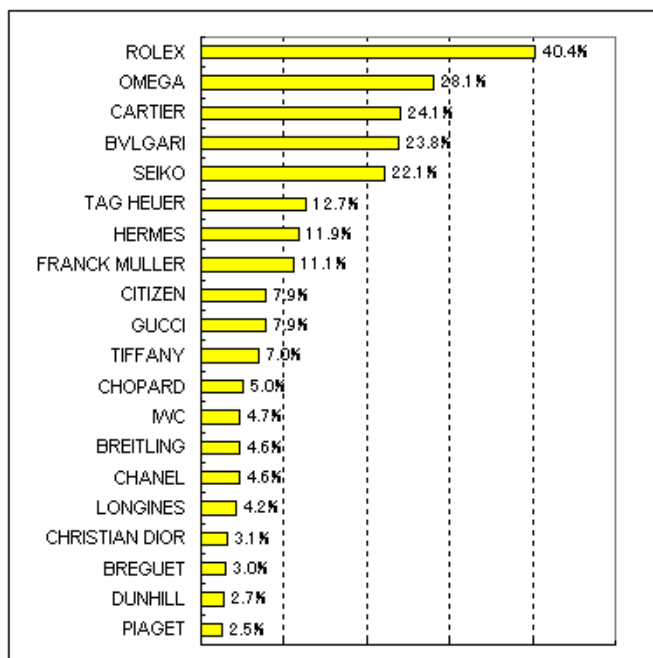
Source of information	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Fashion, life style magazines	44.3%	44.4%	18.4%	22.7%	7.3%	75.4%	70.3%	69.7%	47.9%
Watch retailers	37.7%	26.7%	29.6%	37.1%	44.4%	36.9%	32.2%	40.2%	56.3%
Consumer goods magazines	35.8%	31.9%	49.6%	55.3%	41.1%	16.9%	30.5%	24.6%	36.1%
Watch magazines	24.9%	33.3%	46.4%	39.4%	29.8%	6.9%	16.9%	13.9%	10.1%
Website of brands	21.3%	28.9%	25.6%	28.0%	25.0%	15.4%	11.9%	18.0%	16.0%
Friends	13.0%	15.6%	11.2%	12.1%	5.6%	14.6%	11.9%	14.8%	18.5%
TV, Radio	12.9%	6.7%	11.2%	12.1%	10.5%	23.1%	11.0%	9.0%	20.2%
Website of retailers	11.7%	14.8%	20.0%	12.9%	12.1%	6.9%	11.0%	9.8%	5.9%
Others	4.3%	4.4%	5.6%	6.1%	5.6%	1.5%	4.2%	4.1%	2.5%



Favourite brand ranking 20

Asked the brand name they like or they like to buy in order of first, second and third. The top is Rolex followed by Omega, Cartier, Bvlgari and Seiko. Rolex is popular both for males and females.

(Multiple answer)



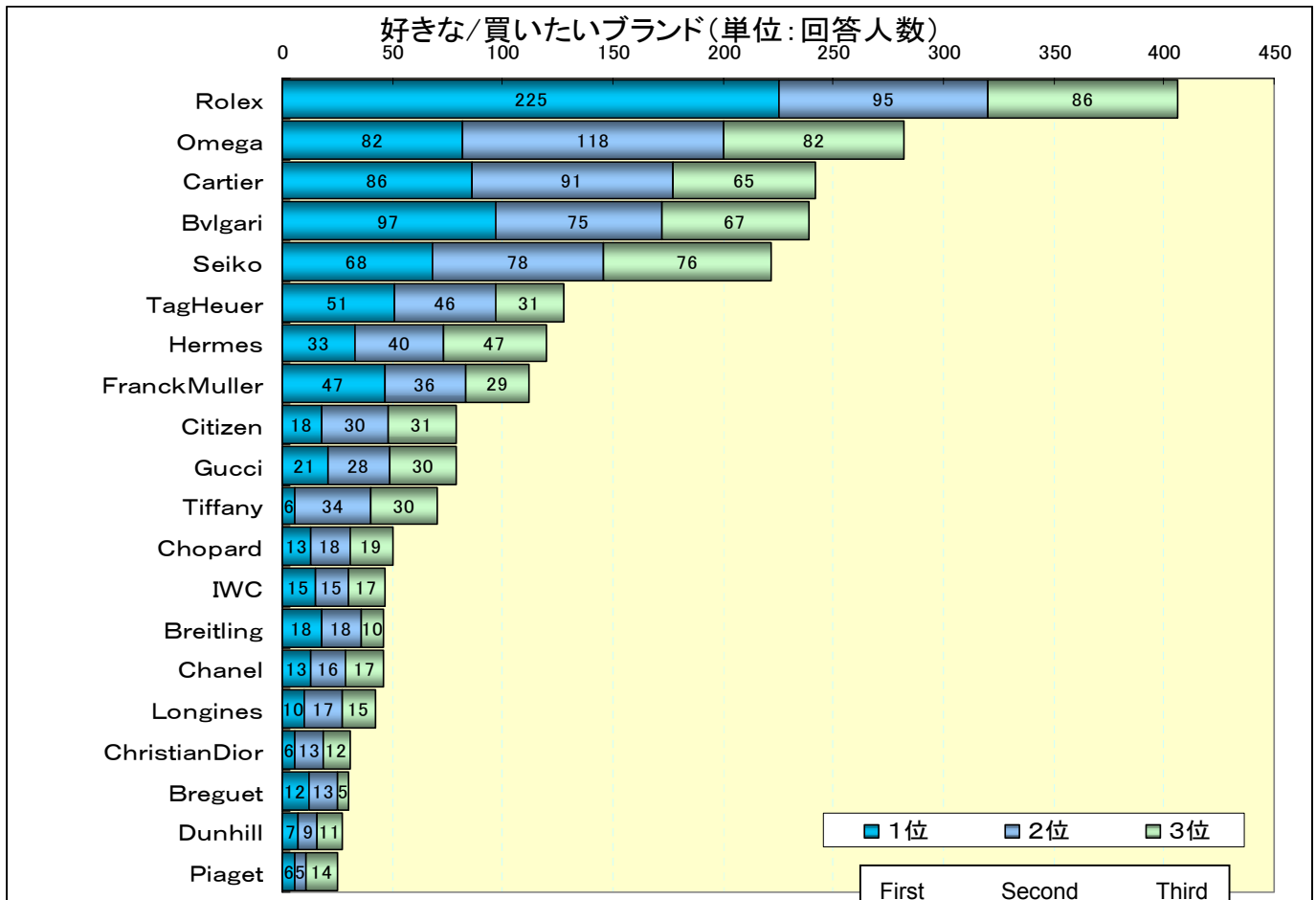
Favourite brand	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
ROLEX	40.4%	41.5%	42.4%	50.8%	57.3%	31.5%	39.8%	33.6%	25.2%
OMEGA	28.1%	44.4%	45.6%	28.8%	26.6%	20.0%	17.8%	18.0%	21.0%
CARTIER	24.1%	11.9%	7.2%	8.3%	14.5%	40.8%	39.8%	33.6%	39.5%
BVLGARI	23.8%	20.7%	14.4%	17.4%	11.3%	30.8%	33.1%	35.2%	28.6%
SEIKO	22.1%	22.2%	24.0%	24.2%	37.9%	19.2%	12.7%	18.9%	16.8%
TAG HEUER	12.7%	14.8%	20.8%	25.8%	18.5%	3.8%	9.3%	7.4%	0.0%
HERMES	11.9%	4.4%	4.8%	4.5%	1.6%	14.6%	26.3%	24.6%	16.8%
FRANCK MULLER	11.1%	17.8%	12.8%	8.3%	2.4%	19.2%	11.0%	9.0%	7.6%
CITIZEN	7.9%	7.4%	8.0%	8.3%	17.7%	6.2%	4.2%	5.7%	5.0%
GUCCI	7.9%	3.0%	4.0%	3.0%	4.8%	16.2%	11.9%	9.8%	10.9%
TIFFANY	7.0%	3.7%	0.8%	3.0%	1.6%	14.6%	12.7%	9.8%	10.1%
CHOPARD	5.0%	0.7%	0.8%	0.8%	0.0%	5.4%	13.6%	13.9%	5.9%
IWC	4.7%	3.7%	13.6%	8.3%	4.8%	2.3%	2.5%	1.6%	0.0%
BREITLING	4.6%	5.9%	8.8%	10.6%	5.6%	0.8%	1.7%	1.6%	0.8%
CHANEL	4.6%	2.2%	0.0%	3.0%	0.8%	5.4%	3.4%	11.5%	10.9%
LONGINES	4.2%	0.0%	4.0%	9.1%	10.5%	1.5%	1.7%	2.5%	4.2%
CHRISTIAN DIOR	3.1%	2.2%	0.0%	0.8%	0.0%	11.5%	1.7%	1.6%	6.7%
BREGUET	3.0%	3.7%	7.2%	1.5%	2.4%	2.3%	1.7%	3.3%	1.7%
DUNHILL	2.7%	3.0%	1.6%	6.8%	6.5%	0.8%	1.7%	0.0%	0.8%
PIAGET	2.5%	0.0%	0.8%	2.3%	1.6%	2.3%	0.8%	4.9%	7.6%



Rolex came top also as the brand selected first

Bvlgari followed Rolex as selected first. Omega is the top selected as second.

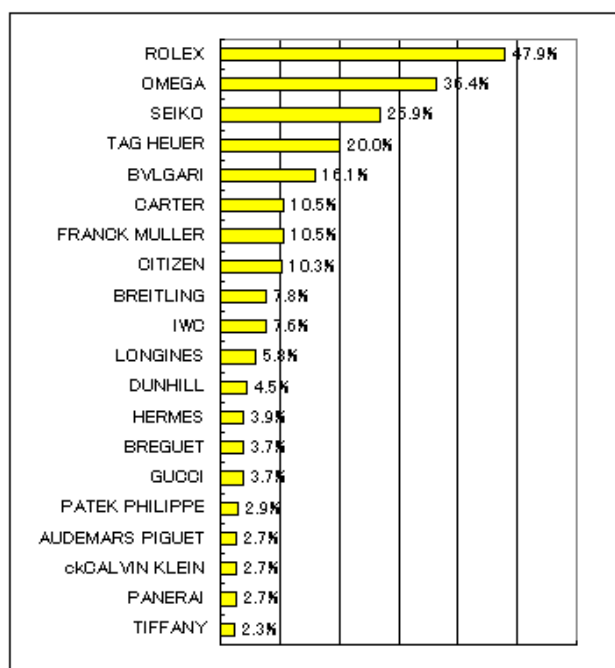
(Number of replies)





Favourite brand ranking 20 - by sex

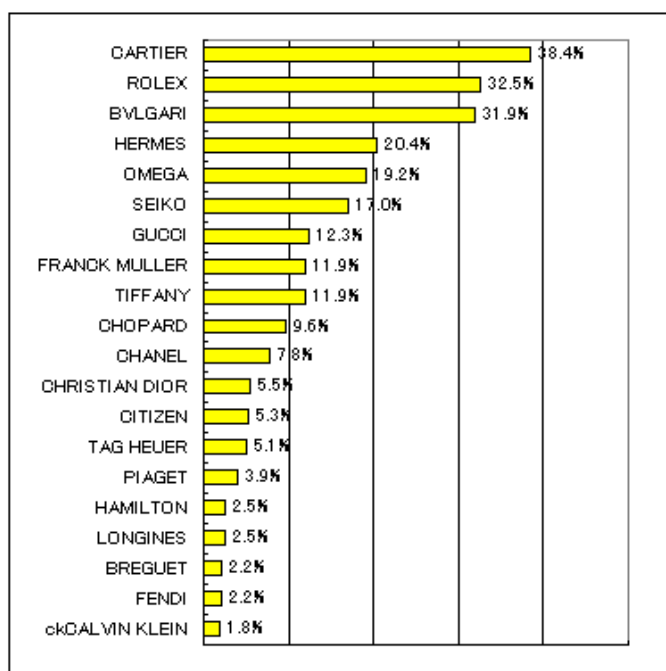
Male



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SEIKO	26.9%	22.2%	24.0%	24.2%	37.9%
TAG HEUER	20.0%	14.8%	20.8%	25.8%	18.5%
BVLGARI	16.1%	20.7%	14.4%	17.4%	11.3%
CARTIER	10.5%	11.9%	7.2%	8.3%	14.5%
FRANCK MULLER	10.5%	17.8%	12.8%	8.3%	2.4%
CITIZEN	10.3%	7.4%	8.0%	8.3%	17.7%
BREITLING	7.8%	5.9%	8.8%	10.6%	5.6%
IWC	7.6%	3.7%	13.6%	8.3%	4.8%
LONGINES	5.8%	0.0%	4.0%	9.1%	10.5%
DUNHILL	4.5%	3.0%	1.6%	6.8%	6.5%
HERMES	3.9%	4.4%	4.8%	4.5%	1.6%
BREGUET	3.7%	3.7%	7.2%	1.5%	2.4%
GUCCI	3.7%	3.0%	4.0%	3.0%	4.8%
PATEK PHILIPPE	2.9%	0.0%	3.2%	3.8%	4.8%
AUDEMARS PIGUET	2.7%	0.0%	2.4%	0.8%	8.1%
ckCALVIN KLEIN	2.7%	7.4%	0.8%	0.8%	1.6%
PANERAI	2.7%	5.2%	4.8%	0.8%	0.0%
TIFFANY	2.3%	3.7%	0.8%	3.0%	1.6%



Female



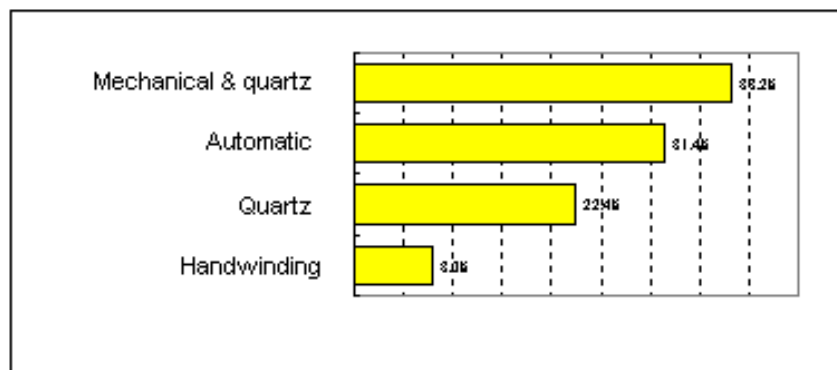
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Number of replies	489	130	118	122	119
CARTIER	38.4%	40.8%	39.8%	33.6%	39.5%
ROLEX	32.5%	31.5%	39.8%	33.6%	25.2%
BVLGARI	31.9%	30.8%	33.1%	35.2%	28.6%
HERMES	20.4%	14.6%	26.3%	24.6%	16.8%
OMEGA	19.2%	20.0%	17.8%	18.0%	21.0%
SEIKO	17.0%	19.2%	12.7%	18.9%	16.8%
GUCCI	12.3%	16.2%	11.9%	9.8%	10.9%
FRANCK MULLER	11.9%	19.2%	11.0%	9.0%	7.6%
TIFFANY	11.9%	14.6%	12.7%	9.8%	10.1%
CHOPARD	9.6%	5.4%	13.6%	13.9%	5.9%
CHANEL	7.8%	5.4%	3.4%	11.5%	10.9%
CHRISTIAN DIOR	5.5%	11.5%	1.7%	1.6%	6.7%
CITIZEN	5.3%	6.2%	4.2%	5.7%	5.0%
TAG HEUER	5.1%	3.8%	9.3%	7.4%	0.0%
PIAGET	3.9%	2.3%	0.8%	4.9%	7.6%
HAMILTON	2.5%	2.3%	4.2%	2.5%	0.8%
LONGINES	2.5%	1.5%	1.7%	2.5%	4.2%
BREGUET	2.2%	2.3%	1.7%	3.3%	1.7%
FENDI	2.2%	1.5%	1.7%	2.5%	3.4%
ckCALVIN KLEIN	1.8%	2.3%	0.0%	2.5%	2.5%



Favourite Watches – movement, type, function and shape

Asked what kind of watches they like by each category. Classic and standard type is popular for both male and female. Males in their 20s and 30s like mechanical watches, and females like fashion watches.

【Movement】

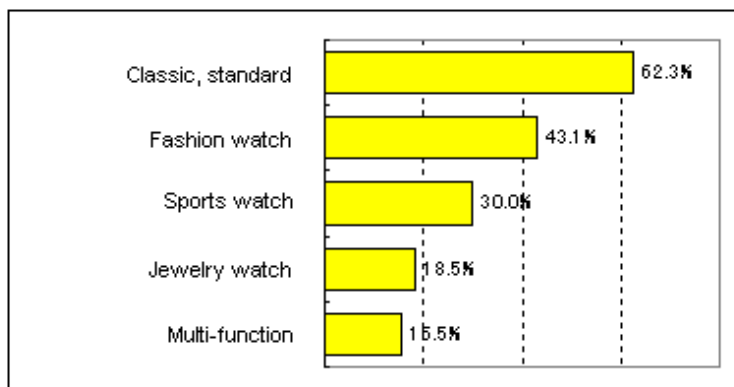


Movement	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Mechanical & quartz	38.2%	34.8%	24.0%	40.9%	38.7%	40.8%	40.7%	45.1%	41.2%
Automatic	31.4%	40.0%	56.0%	28.8%	29.8%	29.2%	26.3%	23.8%	16.0%
Quartz	22.4%	18.5%	11.2%	21.2%	21.8%	21.5%	23.7%	27.9%	34.5%
Handwinding	8.0%	6.7%	8.8%	9.1%	9.7%	8.5%	9.3%	3.3%	8.4%



(Multiple answer)

【 Type 】

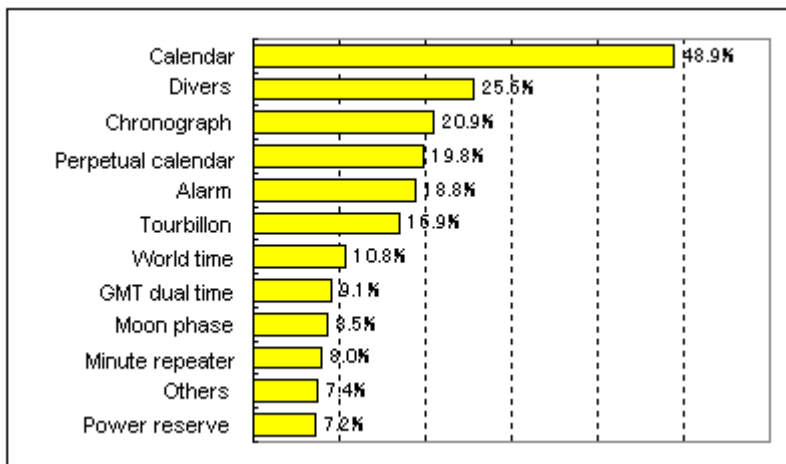


Type	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Classic, standard	62.3%	74.1%	61.6%	59.8%	72.6%	57.7%	59.3%	60.7%	51.3%
Fashion watch	43.1%	32.6%	18.4%	29.5%	15.3%	69.2%	69.5%	54.1%	58.8%
Sports watch	30.0%	28.9%	49.6%	53.0%	30.6%	13.1%	28.0%	22.1%	12.6%
Jewelry watch	18.5%	4.4%	2.4%	3.0%	2.4%	40.8%	36.4%	34.4%	26.9%
Multi-function	15.5%	2.7%	28.0%	27.3%	23.4%	8.5%	5.1%	4.9%	4.2%



(Multiple answer)

【 Function 】

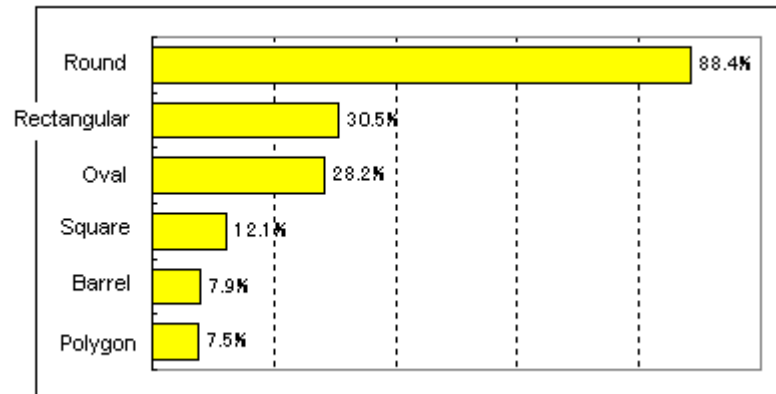


Function	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of relies	1,005	135	125	132	124	130	118	122	119
Calendar	48.9%	51.1%	64.8%	61.4%	66.1%	43.1%	41.5%	29.5%	31.1%
Divers	25.6%	30.4%	43.2%	42.4%	25.0%	16.2%	20.3%	18.0%	6.7%
Chronograph	20.9%	32.6%	36.8%	34.8%	22.6%	9.2%	14.4%	9.0%	5.0%
Perpetual calendar	19.8%	23.0%	21.6%	19.7%	29.0%	17.7%	16.1%	17.2%	13.4%
Alarm	18.8%	17.0%	21.6%	26.5%	22.6%	14.6%	11.0%	12.3%	24.4%
Tourbillon	16.9%	15.6%	13.6%	13.6%	13.7%	18.5%	20.3%	18.9%	21.8%
World time	10.8%	9.6%	8.0%	16.7%	11.3%	13.8%	9.3%	7.4%	10.1%
GMT dual time	9.1%	9.6%	7.2%	15.2%	11.3%	5.4%	8.5%	8.2%	6.7%
Moon phase	8.5%	8.9%	4.8%	15.2%	8.1%	12.3%	9.3%	6.6%	1.7%
Minutes repeater	8.0%	5.9%	8.0%	11.4%	9.7%	3.8%	5.9%	5.7%	13.4%
Others	7.4%	3.0%	4.8%	3.8%	9.7%	8.5%	5.9%	13.9%	10.1%
Power reserve	7.2%	9.6%	10.4%	10.6%	8.1%	3.8%	5.1%	4.9%	4.2%



(Multiple answer)

【 Shape 】



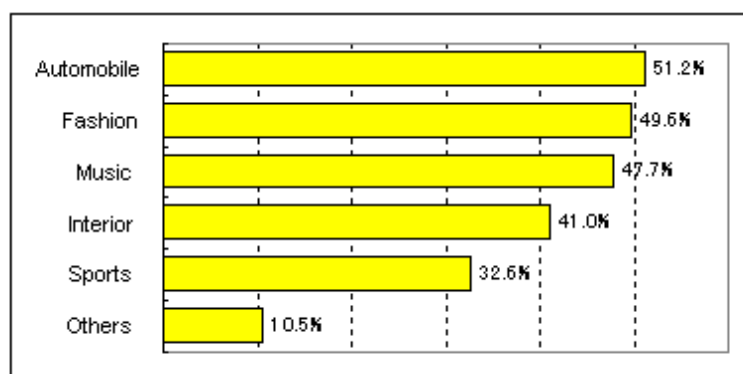
Shape	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Round	88.4%	95.6%	97.6%	97.0%	93.5%	88.5%	81.4%	76.2%	74.8%
Rectangular	30.5%	17.0%	17.6%	16.7%	17.7%	40.0%	46.6%	50.0%	42.0%
Oval	28.2%	20.0%	12.0%	12.9%	5.6%	45.4%	13.2%	45.1%	43.7%
Square	12.1%	11.9%	5.6%	8.3%	8.1%	22.3%	19.5%	11.5%	10.1%
Barrel	7.9%	11.9%	8.0%	7.6%	3.2%	7.7%	12.7%	5.7%	5.9%
Polygon	7.5%	8.9%	8.8%	6.8%	3.2%	10.0%	5.9%	9.8%	5.9%



Hobby

What are hobbies of consumers with interests in watches? Automobile and music for males, and fashion, interior and music for female.

(Multiple answer)



Hobby	TOTAL	Male				Female			
		20s	30s	40s	over50	20s	30s	40s	over50
Number of replies	1,005	135	125	132	124	130	118	122	119
Automobile	51.2%	68.9%	76.0%	66.7%	70.2%	36.2%	37.3%	25.4%	25.2%
Fashion	49.6%	47.4%	27.2%	34.1%	12.9%	83.8%	69.5%	64.8%	58.0%
Music	47.7%	55.6%	43.2%	44.7%	41.1%	57.7%	50.0%	47.5%	40.3%
Interior	41.0%	34.1%	36.8%	21.2%	20.2%	60.8%	63.6%	50.0%	43.7%
Sports	32.6%	43.0%	49.6%	43.9%	35.5%	23.8%	16.1%	26.2%	20.2%
Others	10.5%	8.1%	8.8%	12.1%	13.7%	6.2%	6.8%	15.6%	13.4%



Relation between hobbies and favourite watch brands

Fashion-minded consumers like Cartier and Bvlgari, and sports-minded consumers like Rolex and Omega.

More than 5 point difference from Total	
Strong relationship	Weak relationship

Brand name	TOTAL	Hobby					
		Fashion	Auto	Music	Interior	Sports	Others
Number of replies	1,005	498	515	479	412	328	106
ROLEX	40.4%	41.0%	44.5%	39.0%	39.1%	45.7%	34.0%
OMEGA	28.1%	26.7%	35.5%	26.1%	26.9%	33.5%	21.7%
CARTIER	24.1%	32.3%	21.0%	24.4%	32.0%	20.4%	17.0%
BVLGARI	23.8%	28.9%	21.9%	25.3%	26.2%	20.1%	17.9%
SEIKO	22.1%	15.9%	21.7%	20.9%	16.5%	24.1%	29.2%
TAG HEUER	12.7%	8.2%	16.3%	13.4%	6.6%	16.8%	12.3%
HERMES	11.9%	16.3%	7.0%	11.3%	15.8%	7.9%	11.3%
FRANCK MULLER	11.1%	15.5%	11.5%	14.4%	14.3%	11.6%	6.6%
CITIZEN	7.9%	4.4%	7.4%	8.1%	5.8%	8.5%	7.5%
GUCCI	7.9%	9.6%	4.9%	7.7%	10.4%	4.6%	8.5%
TIFFANY	7.0%	10.2%	5.8%	7.1%	9.0%	5.8%	4.7%
CHOPARD	5.0%	7.2%	2.9%	5.8%	7.3%	2.4%	4.7%
IWC	4.7%	3.4%	6.4%	3.3%	3.9%	4.9%	7.5%
BREITLING	4.6%	3.4%	6.6%	5.2%	3.2%	4.9%	1.9%
CHANEL	4.6%	6.0%	3.9%	2.7%	5.3%	3.0%	3.8%
LONGINES	4.2%	2.4%	4.9%	5.2%	1.9%	4.6%	5.7%
CHRISTIAN DIOR	3.1%	3.6%	1.7%	4.0%	4.4%	1.2%	1.9%
BREGUET	3.0%	3.2%	4.3%	2.7%	3.4%	3.4%	1.9%
DUNHILL	2.7%	1.6%	2.7%	2.3%	0.5%	3.7%	1.9%
PIAGET	2.5%	2.6%	2.1%	2.1%	2.7%	1.2%	3.8%



SUMMARY

Consumers' consciousness of watches is divided into that on the attitude before purchases and on watches selves.

Concerning attitude before purchasing watches, their consciousness can be important factors to plan sales, PR and marketing activities. At the same time, their consciousness on watches selves show their taste or demand for watches, which can be analysed by sex and generation.

Attitudes before purchase watches

Shop to go to buy watches

- Many females buy watches at department stores
- Both males and females go to mass-retail chain operators and discount shops
- Watch retailers chosen by more males

Watch price they are going to buy

- 26% of the total said "more than Yen200,000"
- 60% of males in their 30s said "less than Yen100,000"
- "More than Yen 1mil is 1.2% of the total"

Main source of information

- Females collect information from fashion magazines.
- Males collect from consumer goods magazines.

Important factors to select shops

- "To be an official dealers" is important both for male and female
- "Rich collection"
- "Bigger discount"

Taste and demand on watches

Brand Rolex is the most popular brand
 Rolex, Omega and Seiko for male
 Cartier, Rolex and Bvlgari for female

Shape Males absolutely prefer round
 Female prefer round, but also rectangular and oval

Important factors of selecting watches
 Design, Price and Brand
 Males consider also function
 Female consider also readability

Function Calendar is important both for males and females.
 Males like divers watch
 Some females like even tourbillon



- ◆ The survey showed that many consumers take into consideration if the shop is an official dealer. In the usual consumer goods survey, “rich collection” or “low price” are often selected by many monitors as important factors, but in this survey, as far as watches concern, it is important to be official dealers.
 - 41% of total is going to buy watches at watch retailers
 - “Department stores” (45%) is the most and followed by “mass-retail chain operators and discount shops”(44%).
 - The top three important factors of selecting shops are “Being an official dealer”(57%), “Rich collection”(49%), and “Bigger discount”(45%).
 - Evance came top as the actual shop they go. This result conflicts with the fact that they take into consideration if the shop is an official dealer. It could be that consumers accept Evance because they are partially an official dealer of some brands, or otherwise, consumers class parallel dealers involuntarily by reliability or celebrity. Or, maybe, consumers believe that Evance is an official dealer.
(see Page 6 for Evance)

- ◆ “Design” is the most important factor when selecting watches. Consumers seem to be attracted by the design. “Brand” and “Function” are also important as well as “Price”. Concerning favourite shape of watches, round case is the most popular, but liked more by males than female who like also rectangular or oval.
 - Consumers paying more than Yen200,000 for a watch is 26% of the total, and 14% is paying more than Yen300,000.
 - Important factors when selecting a watch is “Design”(85%), Price(55%), and “Brand”(54%)
 - Favourite brands are Rolex(40%), Omega(28%), Cartier(24%), Bvlgari(24%), and Seiko(22%).
 - Movements varies, besides classic and standard type(62%) is liked the most.
 - Calendar as function(49%), and round (88%) as shape is favoured.

- ◆ Rolex is the most favoured brand, and Seiko is the 5th. Big note and popularity of Rolex is again proved. A ranking made by one of watch magazines reported Breitling as top, but the same brand is listed No.14 in this survey. It is probably because the difference between the survey on watch enthusiasts and on more average consumers.

- ◆ 60% of total have got watches as gift. Most of them have received for their birthday(54%).

- ◆ Main source of information for watches is magazines and watch retailers.
 - Source of information is “Fashion, life style magazines”(44%), “Watch retailers”(38%), and “Consumer goods magazines”(36%).
 - At the same time, they started to have interests influenced by “Fashion, life style magazines”(34%), “Consumer goods magazines”(26%), “Watch magazines”(19%), and “Friends who like watches”(21%).

(March 20, 2006)