スイス時計協会 FH
Fédération de l'industrie horlogère suisse FH
Federation of the Swiss Watch Industry FH

Consumer Awareness Survey on Watches 2012

(Summary of Survey Results)

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The Federation of the Swiss Watch Industry FH conducted a questionnaire on Japanese consumers' awareness of and buying trends for watches, in the same manner as it did in 2010.
We expanded the survey questions to reflect suggestions from member companies of the federation, importers and affiliates, and made it possible to compare the results for questions that also appeared in the 2010 survey.
The survey was designed to be conducted on the Internet, and was targeted at male and female people aged 20 or over who were interested in luxury watches. We asked Yano Research Institute Ltd. to carry out the survey. It was conducted on February 11 and 12, 2012, and we obtained 1,500 valid responses. The following analysis was undertaken by Yano Research Institute Ltd.

- **Survey area** Whole of Japan

- **Survey method** Internet questionnaire

- **Survey date** Friday, February 11 and 12, 2012

- **Survey subjects** Male and female aged 20 or older in Japan who satisfy the following conditions (equal proportion):

  1) Have bought watches by themselves; and

  2) Are Interested or somewhat interested in watches that cost 100,000 yen or more.

- **Number of valid responses** 1,500

■ Review

Review: 1

Price range of watch you want to buy

1) "Lowering" of purchase price continues

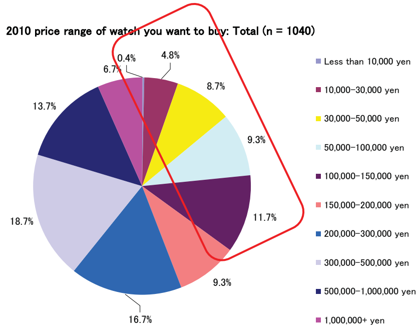
- "The purchase price of the watch you want" edged even lower. The price range of "10,000 – 150,000 yen" increased 6.9 points from 2010.
- By age group, samples in their 20s outnumbered other age groups for both males and females. Namely among males in their 20s, the lowering of "the purchase price of the watch you want" was evident.
  In the price range of "10,000 – 150,000 yen", the ratio of male respondents in their 20s increased 16.0 points from 2010 while females in their 20s increased 7.1 points from 2010.

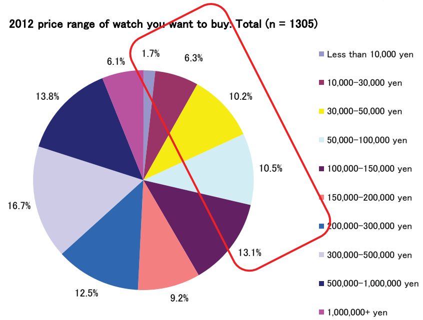
2) Existence of "affordable high price range" remains apparent

■ While the price of the watch that consumers want to buy "lowered" further, "300,000 – 500,000 yen" was the most popular response for both males and females samples.

■ Among the male samples, "300,000 – 500,000 yen" was the top response, followed by "500,000 – 1,000,000 yen" and "100,000 – 150,000 yen" in this order. Among females, "300,000 – 500,000 yen" was the highest, followed by "200,000 – 300,000 yen" and "30,000 – 50,000 yen" in this order.

■ For users interested in watches costing 100,000 yen or above, the price range of "affordable luxury watches" that "you want to buy", is "300,000 – 500,000 yen", and males are willing to pay one range higher to buy the watch desired.





	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2010(n=544)	2012(n=664)	2010(n=142)	2012(n=125)	2010(n=130)	2012(n=194)	2010(n=152)	2012(n=186)	2010(n=120)	2012(n=159)
Less than 10,000 yen	0.4	1.5	0.7	1.6	0.0	2.6	0.7	1.6	0.0	0.0
10,000–30,000 yen	5.1	6.3	4.9	16.0	6.2	6.2	5.3	5.4	4.2	0.0
30,000–50,000 yen	7.9	7.7	12.7	11.2	5.4	6.2	6.6	7.0	6.7	7.5
50,000–100,000 yen	9.0	10.4	10.6	14.4	9.2	10.3	7.2	8.1	9.2	10.1
100,000–150,000 yen	12.7	14.5	12.7	14.4	16.9	14.9	8.6	13.4	13.3	15.1
150,000–200,000 yen	9.0	8.6	12.7	6.4	9.2	10.3	7.2	7.5	6.7	9.4
200,000–300,000 yen	16.2	10.1	13.4	11.2	15.4	9.3	23.7	8.6	10.8	11.9
300,000–500,000 yen	18.0	18.1	10.6	12.0	20.8	21.6	19.1	19.9	22.5	16.4
500,000–1,000,000 yen	13.8	16.0	15.5	9.6	11.5	14.4	12.5	19.9	15.8	18.2
1,000,000+ yen	7.9	6.9	6.3	3.2	5.4	4.1	9.2	8.6	10.8	11.3

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2010(n=496)	2012(n=641)	2010(n=127)	2012(n=194)	2010(n=127)	2012(n=171)	2010(n=140)	2012(n=152)	2010(n=102)	2012(n=124)
Less than 10,000 yen	0.4	1.9	1.6	3.1	0.0	1.2	0.0	2.0	0.0	0.8
10,000–30,000 yen	4.4	6.2	11.8	12.4	2.4	3.5	2.1	3.9	1.0	3.2
30,000–50,000 yen	9.5	12.8	18.1	21.6	7.1	10.5	6.4	7.9	5.9	8.1
50,000–100,000 yen	9.7	10.6	11.8	13.4	11.0	10.5	5.0	7.9	11.8	9.7
100,000–150,000 yen	10.7	11.7	9.4	9.3	7.1	15.2	14.3	13.2	11.8	8.9
150,000–200,000 yen	9.7	9.8	5.5	8.2	11.8	9.4	12.9	8.6	7.8	14.5
200,000–300,000 yen	17.3	15.0	8.7	7.2	17.3	15.8	20.0	21.1	24.5	18.5
300,000–500,000 yen	19.4	15.3	18.9	11.3	23.6	18.1	18.6	17.1	15.7	15.3
500,000–1,000,000 yen	13.5	11.5	9.4	8.8	14.2	11.7	16.4	13.2	13.7	13.7
1,000,000+ yen	5.4	5.1	4.7	4.6	5.5	4.1	4.3	5.3	7.8	7.3

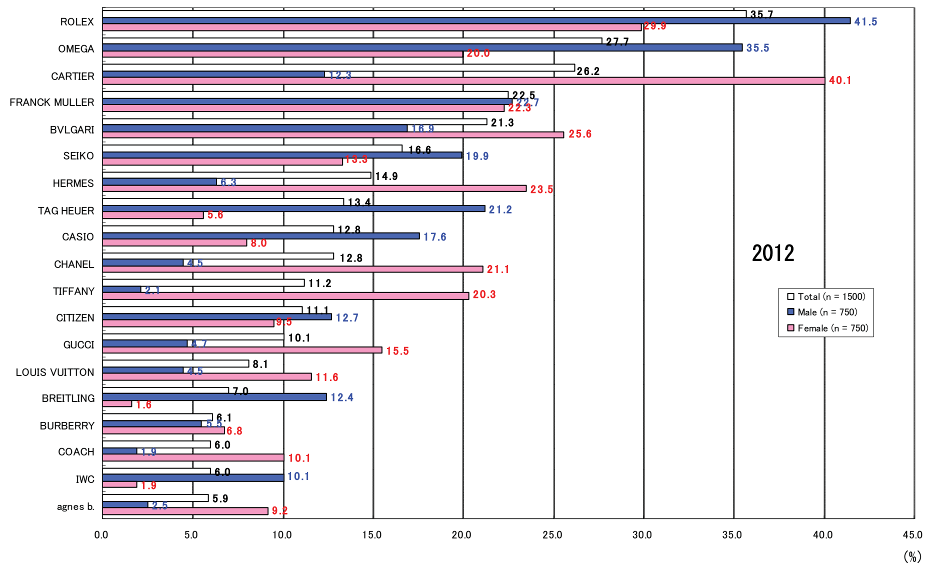
Next desired purchase

Male consumers continue to prefer "luxury mechanical sports watches" and females want "luxury fashion watches" although the trend has shifted to standard, basic and dressy watches. Apparent are needs for a second or third luxury watch

■ Needs for "ROLEX" and "OMEGA" remain strong, with male groups particularly driving the overall demand.

■ Among females, "CARTIER" is a step ahead of others (40%-49%), followed by "ROLEX", "BVLGARI" and "HERMES" (each at 20%-29%)

■ Among the top 5 newly ranked brands, "FRANCK MULLER" most significantly raised its popularity for both males and females (males: 6th in 2010 to 3rd in 2011; females: 6th in 2010 to 5th in 2011). In addition to the trends for standard, basic and dressy watches, needs for a second or third watch have become apparent.



Review: 2

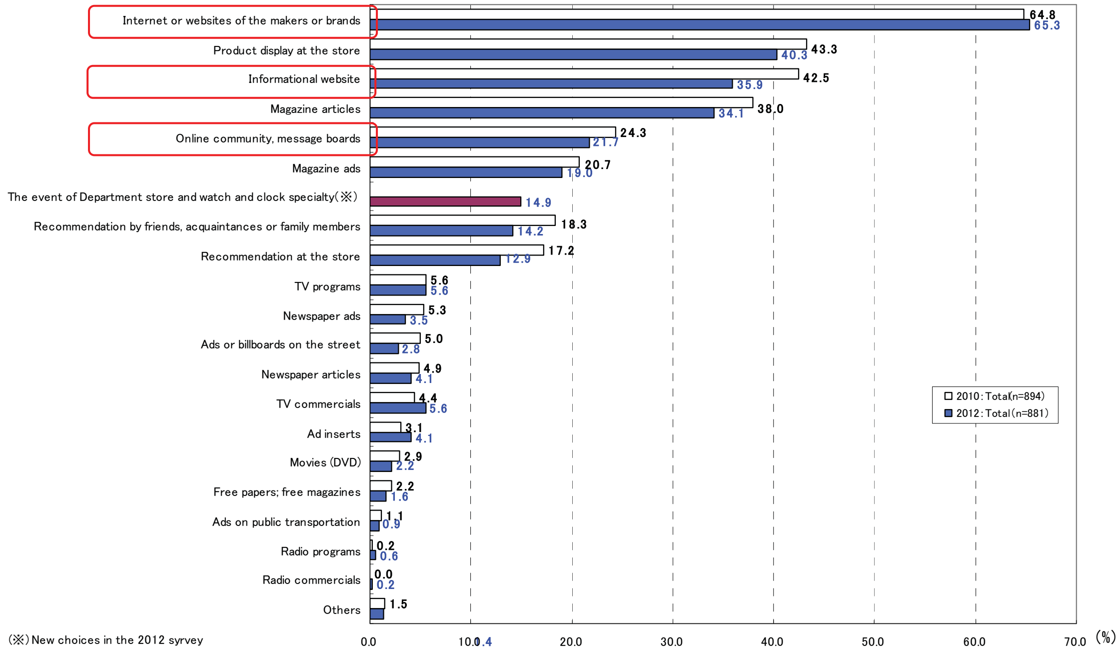
Media which are influential in purchasing

Greater prevalence of Internet-related information

■ "Internet and websites of makers/brands" are most frequently used as the most influential media for purchasing a watch.

■ "Informational websites" and "Community/message boards" are also popular among Internet-based vehicles. The consumer behavior of determining whether or not to purchase based on information gathered on the Internet is becoming more prevalent.

■ Meanwhile, there is still a high dependency on "Product display at the store" and "Magazine articles". Hence, distributors are expected to deploy advertising and promotional strategies based on a set of well-balanced tangible and intangible sources.



(※) New choices in the 2012 syrvey

Location of actual purchase

Bricks-and-mortar stores remain the mainstream; male dominance over the Internet although usage is expanding for both males and females

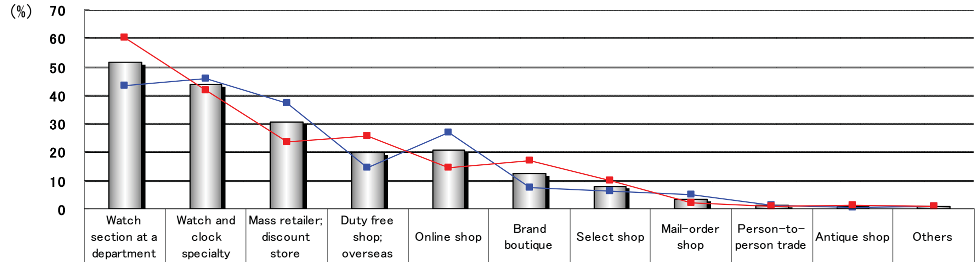
■ "Watch section of a department store" remains at the top spot in "Store that you often use when purchasing a watch", with female users driving the overall demand.

■ For male consumers, "Watch and clock specialty store; jewelry store" is the most popular, followed by "Mass retailer; discount store" and "Internet (online shop)" while females prefer, in addition to "Watch section of a department store", "Duty free shop; overseas" and "Brand boutique".

■ Male consumers continue to be relatively more comfortable with online shopping. The difference in consumer awareness between males and females is that the former focuses on functions and specifications (lesser need to try the watch on at the store) whereas the latter emphasizes fashionableness (greater need to put the watch on at the store), which affects the magnitude of usage of online shopping.

■ It should be noted that online shopping is expanding among consumers – both males and females – primarily in their 30s, 40s and even 50s and above, and is gradually securing its presence as a "place to buy watches".

2012

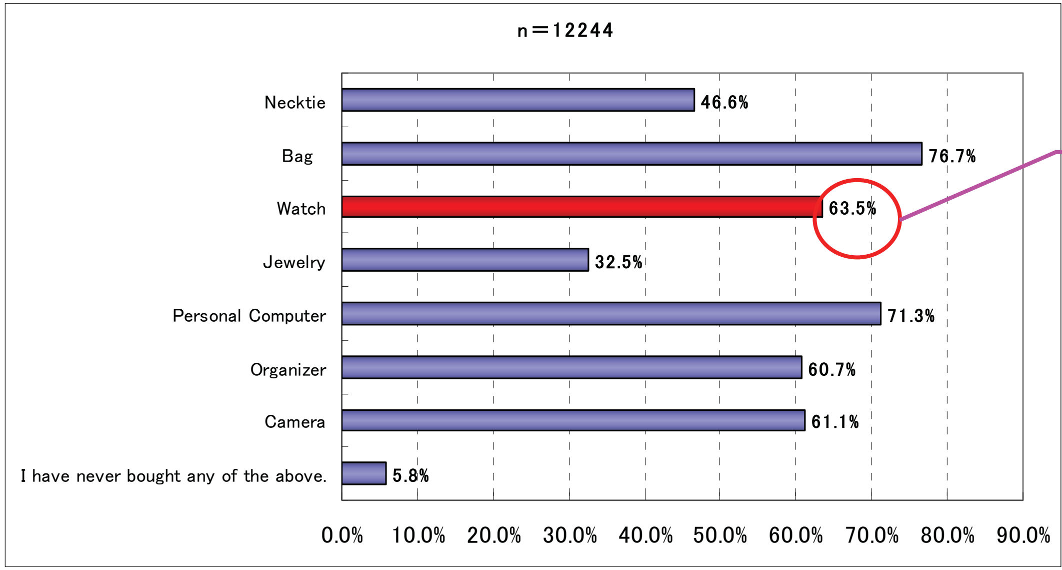


	Watch section at a department	Watch and clock specialty	Mass retailer; discount store	Duty free shop; overseas	Online shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Total(n=1500)	51.6	43.7	30.4	19.9	20.6	12.2	7.9	3.4	1.1	0.9	0.9
Male(n=750)	43.1	45.7	37.2	14.3	26.7	7.5	6.1	4.8	1.3	0.5	0.9
Female(n=750)	60.1	41.7	23.6	25.5	14.5	16.9	9.7	2.0	0.8	1.2	0.9

■ Screening survey: Sample size of 12,244

Screening survey (extracting survey subjects)

We extracted those who **chose "(3) watch"** as the answer for question SC1: "Have you purchased any of the following products*?" (MA).
* (1) necktie, (2) bag (3) watch, (4) jewelry, (5) personal computer, (6) organizer, (7) camera, (8) I have never bought any of the above



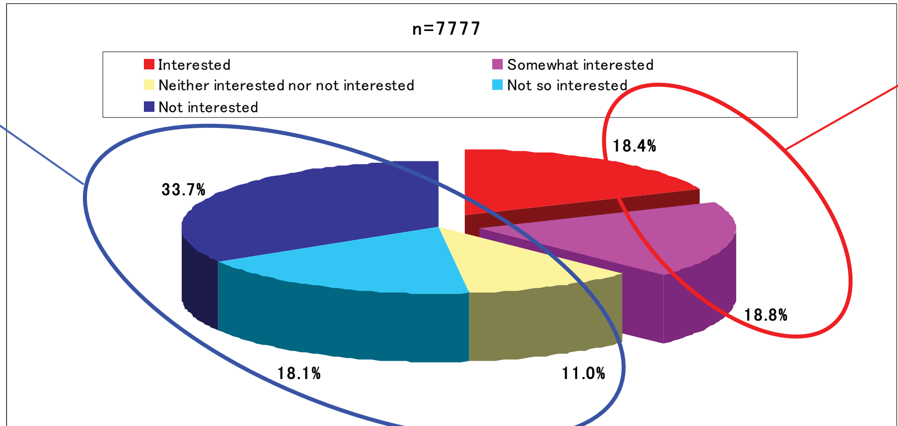
Those who have bought a watch: 7,777

Furthermore...

We have selected as survey **subjects those who answered "Interested" or "Somewhat interested"** to question SC2: "Are you interested in a watch costing over 100,000 yen?"

Those who are not interested in a watch costing over 100,000 yen (Non-subjects)

62.8%



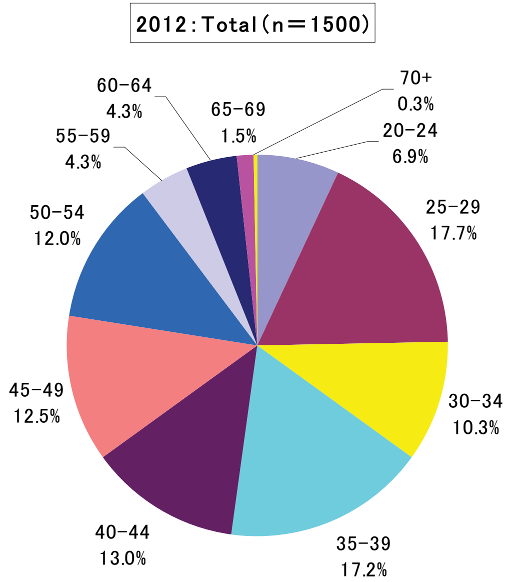
Those who are interested in a watch costing over 100,000 yen (Subjects)

37.2%

■ Survey Results 1: Subjects' Profile (sample size of 1,500)

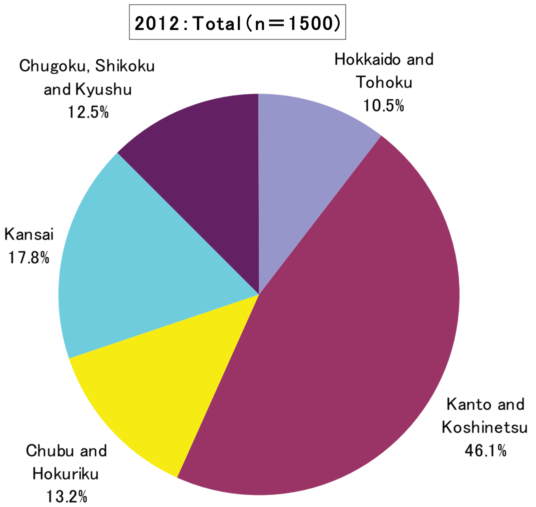
Subjects' Profile (basic attributes)

■Sex and age distribution



	Total	Male	Female
n	1500	750	750
20–24	6.9	6.0	7.7
25-29	17.7	13.2	22.1
30-34	10.3	10.8	9.7
35-39	17.2	18.0	16.4
40-44	13.0	12.8	13.2
45-49	12.5	14.8	10.1
50-54	12.0	11.6	12.4
55-59	4.3	6.4	2.3
60-64	4.3	4.5	4.1
65-69	1.5	1.3	1.7
70+	0.3	0.5	0.1

■Geographical distribution



■Occupational distribution

	Total	Male	Female
n	1500	750	750
Company employee	47.5	62.1	32.9
Government employee	7.2	10.0	4.4
Company executive	2.8	5.2	0.4
Self-owned business	5.2	8.1	2.3
Freelance	1.9	2.0	1.7
Part-time employee	9.7	3.2	16.1
Homemaker	16.7	0.0	33.3
Student	3.7	3.3	4.1
Unemployed	3.9	5.1	2.8
Others	1.4	0.9	1.9

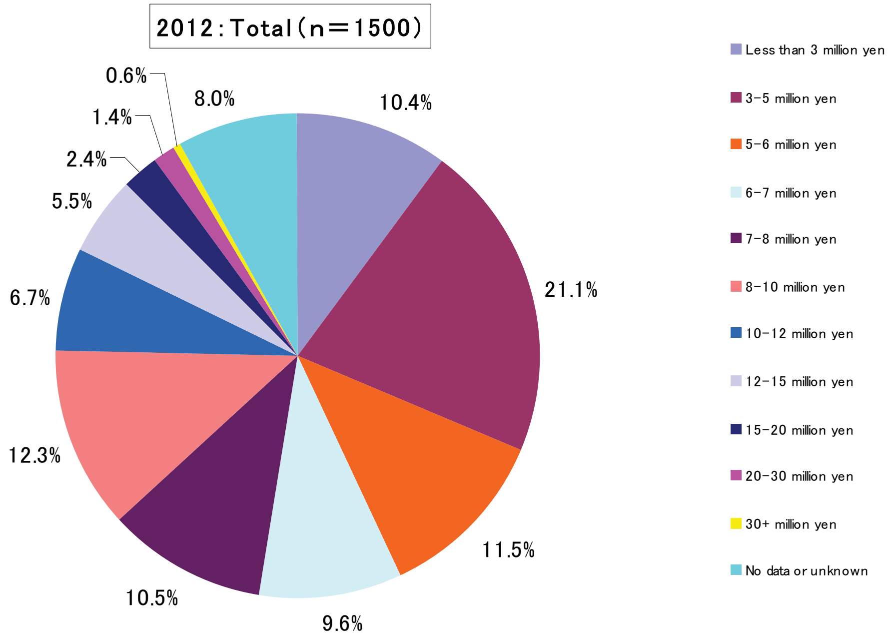
■Marital status

	Total	Male	Female
n	1500	750	750
Single	37.1	36.7	37.5
Married	62.9	63.3	62.5

■Family structure

	Total	Male	Female
n	1500	750	750
Spouse	61.9	62.8	60.9
Children	41.9	44.5	39.2
Parents	25.6	25.2	26.0
Siblings	8.5	6.7	10.4
Others	3.1	2.5	3.6
Living alone	16.9	18.3	15.5

■Household annual income (all)



■Household annual income (male)

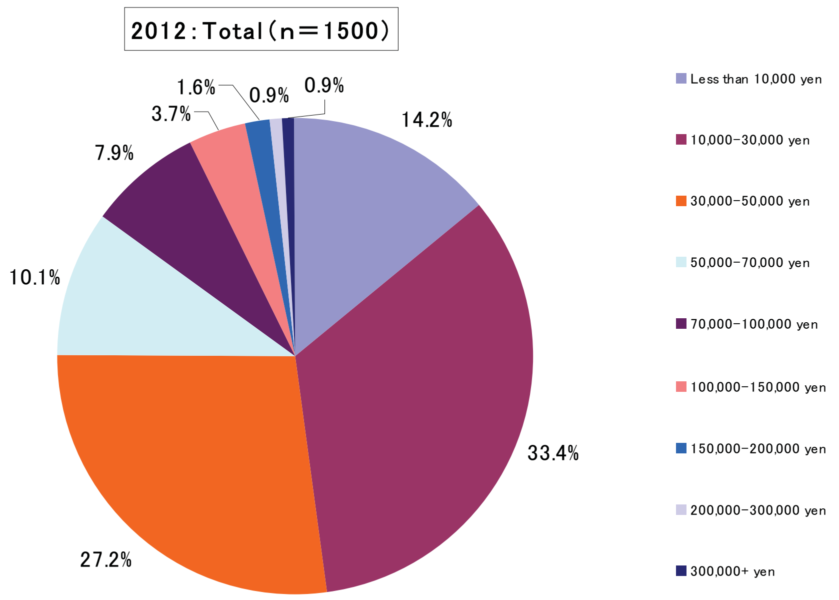
	Male				
	Total（n＝750）	20s（n＝144）	30s（n＝216）	40s（n＝207）	50s+（n＝183）
Less than 3 million yen	9.5	16.0	6.5	8.7	8.7
3–5 million yen	20.9	28.5	28.2	14.0	14.2
5–6 million yen	12.4	12.5	16.2	10.6	9.8
6-7 million yen	11.2	6.9	15.7	13.5	6.6
7-8 million yen	11.1	6.9	12.0	13.5	10.4
8–10 million yen	11.7	5.6	9.3	15.5	15.3
10-12 million yen	6.9	5.6	3.2	6.3	13.1
12-15 million yen	5.6	3.5	2.3	5.8	10.9
15-20 million yen	2.9	2.8	0.5	3.4	5.5
20-30 million yen	0.8	0.0	0.0	1.4	1.6
30+ million yen	0.7	0.7	0.9	0.5	0.5
No data or unknown	6.3	11.1	5.1	6.8	3.3

■Household annual income (female)

	Female				
	Total（n＝750）	20s（n＝224）	30s（n＝196）	40s（n＝175）	50s+（n＝155）
Less than 3 million yen	11.3	17.9	9.2	6.9	9.7
3–5 million yen	21.3	25.9	25.5	14.9	16.8
5–6 million yen	10.7	10.3	11.2	12.6	8.4
6-7 million yen	8.0	4.0	10.2	10.3	8.4
7-8 million yen	10.0	7.6	10.2	16.6	5.8
8–10 million yen	12.8	9.4	10.7	16.6	16.1
10-12 million yen	6.4	5.4	4.1	7.4	9.7
12-15 million yen	5.3	3.6	6.6	5.1	6.5
15-20 million yen	1.9	2.2	0.0	1.1	4.5
20-30 million yen	2.0	3.1	0.5	1.7	2.6
30+ million yen	0.5	0.9	0.5	0.0	0.6
No data or unknown	9.7	9.8	11.2	6.9	11.0

* Total average: 6,690,500 yen; male average: 6,847,000 yen; female average: 6,534,000 yen
* Average by sex and age group (males) … Males in their 20s: 5,466,000 yen; Males in their 30s: 6,074,000 yen; Males in their 40s: 7,230,000 yen; Males aged 50+: 8,349,000 yen
* Average by sex and age group (females) … Females in their 20s: 6,237,000 yen; Females in their 30s: 5,882,000 yen; Females in their 40s: 6,921,000 yen; Females aged 50+: 7,392,000 yen

■Allowance (monthly: all)



■Allowance (monthly: male)

	Male				
	Total(n=750)	20s(n=144)	30s(n=216)	40s(n=207)	50s+(n=183)
Less than 10,000 yen	8.0	6.9	6.9	13.5	3.8
10,000–30,000 yen	32.5	30.6	35.2	32.9	30.6
30,000–50,000 yen	31.2	35.4	36.1	27.5	26.2
50,000–70,000 yen	11.1	10.4	7.4	9.7	17.5
70,000–100,000 yen	8.9	9.7	6.5	6.8	13.7
100,000–150,000 yen	4.3	6.3	3.2	5.3	2.7
150,000–200,000 yen	1.3	0.7	1.4	1.0	2.2
200,000–300,000 yen	0.9	0.0	1.4	0.5	1.6
300,000+ yen	1.7	0.0	1.9	2.9	1.6

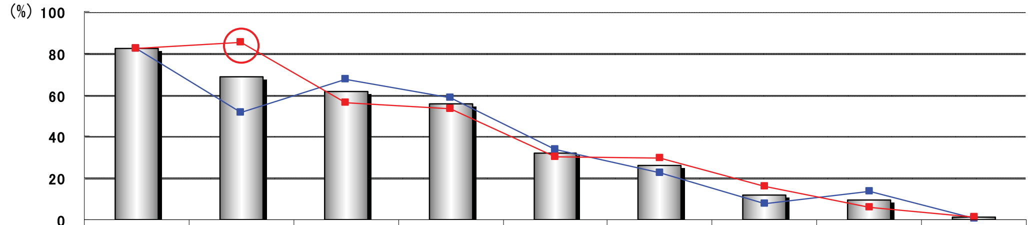
■Allowance (monthly: female)

	Female				
	Total(n=750)	20s(n=224)	30s(n=196)	40s(n=175)	50s+(n=155)
Less than 10,000 yen	20.4	17.9	24.0	25.1	14.2
10,000–30,000 yen	34.3	34.4	32.7	34.9	35.5
30,000–50,000 yen	23.2	21.9	25.0	19.4	27.1
50,000–70,000 yen	9.2	12.5	8.2	8.0	7.1
70,000–100,000 yen	6.9	7.6	5.1	8.0	7.1
100,000–150,000 yen	3.2	1.3	3.1	3.4	5.8
150,000–200,000 yen	1.9	3.6	1.0	0.6	1.9
200,000–300,000 yen	0.8	0.9	0.5	0.6	1.3
300,000+ yen	0.1	0.0	0.5	0.0	0.0

* Total average: 43,500 yen; Male average: 50,000 yen; Female average: 37,000 yen
* Average by sex and age (males) … Males in their 20s: 43,000 yen; Males in their 30s: 49,000 yen; Males in their 40s: 52,000 yen; Males aged 50+: 57,000 yen
* Average by sex and age (females) … Females in their 20s: 39,000 yen; Females in their 30s: 35,000 yen; Females in their 40s: 33,000 yen; Females aged 50+: 41,000 yen
* Males, as they get older, have more money that they can spend freely. Females in their 20s and 50+ have relatively more money to spend freely than those in their 30s and 40s who are busy raising children.

■What to spend allowance on (monthly: all)

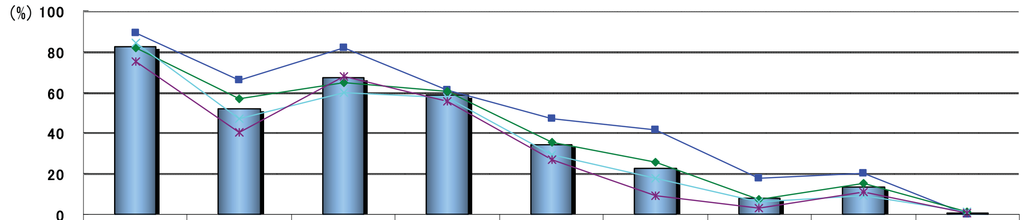
2012



	Entertainment (including dining)	Clothing and personal items (including	Hobbies	Recreation (leisure activities, traveling,	Mobile and Internet connection	Savings	School/lesson for skill/hobby	Stocks and investments	Others
Total (n = 1500)	82.3	68.6	61.7	55.9	32.0	26.0	12.0	9.7	1.0
Male (n = 750)	82.1	51.7	67.3	58.7	33.9	22.7	7.9	13.5	0.8
Female (n = 750)	82.5	85.5	56.1	53.2	30.1	29.3	16.1	5.9	1.2

■What to spend allowance on (monthly: male)

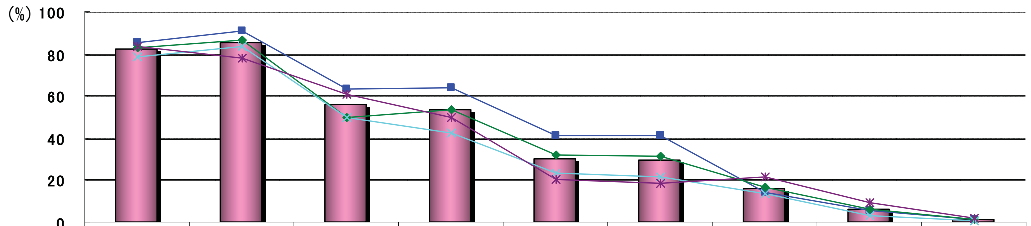
2012



	Entertainment (including dining)	Clothing and personal items (including	Hobbies	Recreation (leisure activities,	Mobile and Internet connection	Savings	School/lesson for skill/hobby	Stocks and investments	Others
Male (n = 750)	82.1	51.7	67.3	58.7	33.9	22.7	7.9	13.5	0.8
Male 20s(n=144)	88.9	66.0	81.9	61.1	47.2	41.7	17.4	20.1	0.0
Male 30s(n=216)	81.9	56.5	64.4	60.6	35.2	25.9	7.4	15.3	1.4
Male 40s(n=207)	84.1	46.9	59.9	57.5	29.5	17.9	5.8	9.2	1.0
Male 50s+(n=183)	74.9	40.4	67.8	55.7	26.8	9.3	3.3	10.9	0.5

■What to spend allowance on (monthly: female)

2012



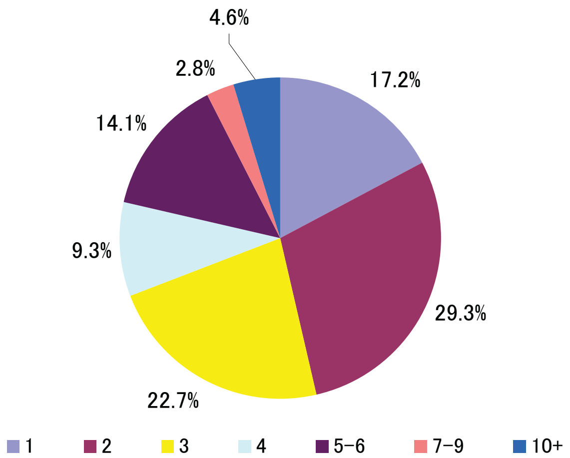
	Entertainment (including dining)	Clothing and personal items (including	Hobbies	Recreation (leisure activities,	Mobile and Internet connection	Savings	School/lesson for skill/hobby	Stocks and investments	Others
Female (n = 750)	82.5	85.5	56.1	53.2	30.1	29.3	16.1	5.9	1.2
Female 20s (n=224)	85.3	91.1	63.4	63.8	41.1	41.1	14.3	5.8	1.3
Female 30s (n=196)	82.7	86.7	50.0	53.6	31.6	31.1	16.3	6.1	1.0
Female 40s (n=175)	78.3	83.4	49.7	42.3	23.4	21.7	13.7	2.9	0.6
Female 50s+ (n=155)	83.2	78.1	60.6	49.7	20.0	18.7	21.3	9.0	1.9

* Willingness to purchase clothing and personal items is higher in females than in males, mainly among females in their 20s through 40s.
* “Mobile and Internet connection fee” ranked high mainly for both male and female respondents in their 20s and 30s. One out of four males and females aged 50 or older also chose this answer.
* Likely due to the continuing severe conditions in the labor market and concerns for the future, clearly more males and females in their 20s gave “Savings” as their answer than in other age groups, as in the previous survey in 2010.

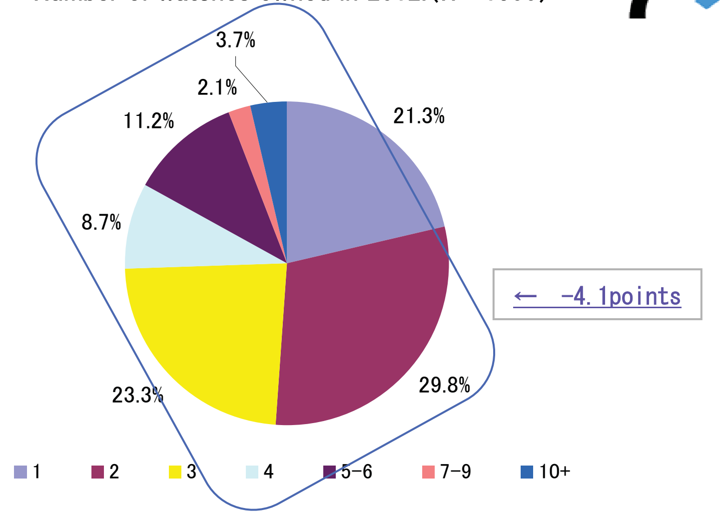
■ Survey Results 2: Main Survey (sample size of 1,500)

■Number of watches owned (all)

Number of watches owned in 2010:(n=1500)



Number of watches owned in 2012:(n=1500)



■Number of watches owned (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2010(n=750)	2012(n=750)	2010(n=180)	2012(n=144)	2010(n=172)	2012(n=216)	2010(n=219)	2012(n=207)	2010(n=179)	2012(n=183)
1	18.5	21.2	37.2	32.6	18.0	28.2	11.9	15.0	8.4	10.9
2	30.5	29.1	33.3	38.2	33.7	29.6	29.2	28.0	26.3	22.4
3	21.5	23.6	19.4	19.4	23.3	23.1	17.8	20.3	26.3	31.1
4	8.5	7.7	2.8	5.6	10.5	6.9	9.1	9.2	11.7	8.7
5-6	12.5	11.5	4.4	3.5	7.6	7.9	19.2	17.9	17.3	14.8
7-9	2.7	2.1	1.1	0.0	2.9	1.4	3.2	4.3	3.4	2.2
10+	5.7	4.8	1.7	0.7	4.1	2.8	9.6	5.3	6.7	9.8

■Number of watches owned (female)

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2010(n=750)	2012(n=750)	2010(n=170)	2012(n=224)	2010(n=189)	2012(n=196)	2010(n=209)	2012(n=175)	2010(n=182)	2012(n=155)
1	15.9	21.5	21.2	29.0	18.0	25.5	10.5	16.6	14.8	11.0
2	28	30.5	42.9	38.8	28	28.1	20.6	26.3	22.5	26.5
3	24	22.9	21.8	17.4	19.6	24.0	27.8	24.6	26.4	27.7
4	10.1	9.6	4.7	8.9	11.1	9.7	12	10.3	12.1	9.7
5-6	15.6	10.9	6.5	4.0	15.9	10.2	21.1	16.0	17.6	16.1
7-9	2.9	2.0	2.4	1.8	4.8	2.0	2.9	1.7	1.6	2.6
10+	3.5	2.5	0.6	0.0	2.6	0.5	5.3	4.6	4.9	6.5

＊In 2012, the ratio of “people who own two or more watches” declined. The ratio was 78.7%, down 4.1 points from 2010.

＊While the overall proportion of “people who own two or more watches” declined, the ratio of those who own two or more watches increased from 2010 by 4.7 points among males in their 20s and by 4.0 points among females in their 50s or older.

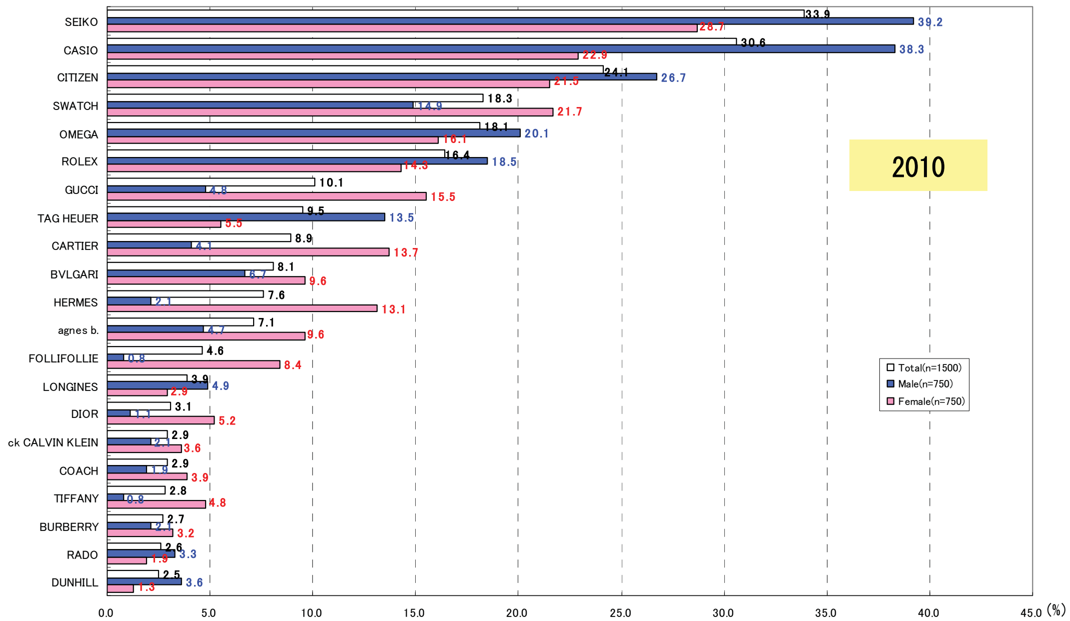
■Brand of watch owned (ranking comparison 2010-2012)

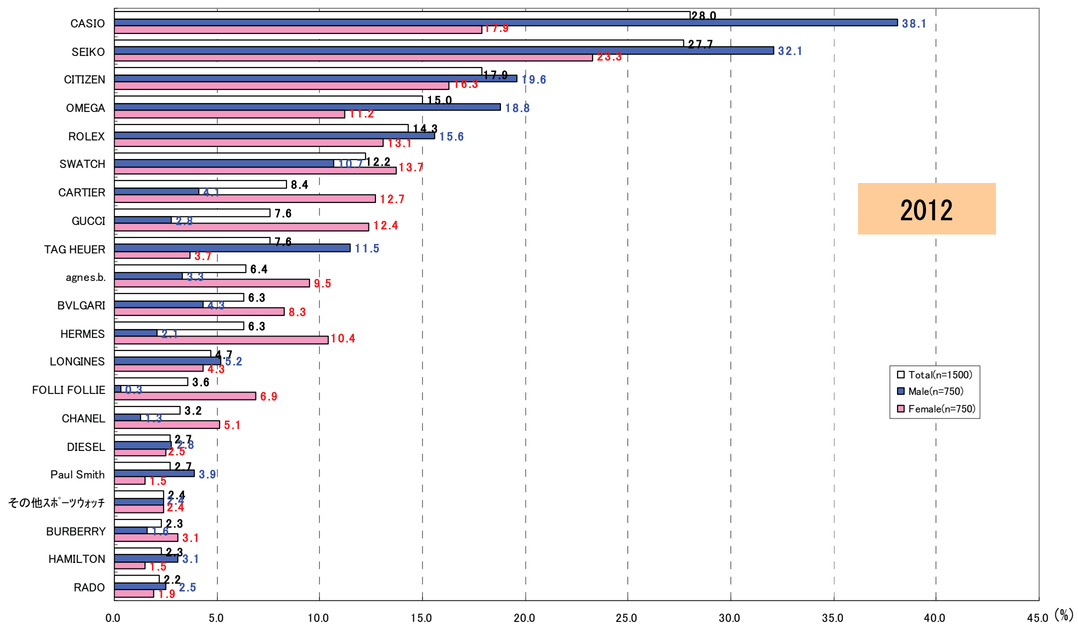
2010 Order	2010 Brand	2010 Total n=1500	Change	2012 Order	2012 Brand	2012 Total n=1500	
1	SEIKO	33.9	To 2nd place	1	CASIO	28.0	
2	CASIO	30.6	To 1st place	2	SEIKO	27.7	
3	CITIZEN	24.1	→	3	CITIZEN	17.9	
4	SWATCH	18.3	To 6th place	4	OMEGA	15.0	
5	OMEGA	18.1	To 4th place	5	ROLEX	14.3	
6	ROLEX	16.4	To 5th place	6	SWATCH	12.2	
7	GUCCI	10.1	To 8th place	7	CARTIER	8.4	
8	TAG HEUER	9.5	To 9th place	8	GUCCI	7.6	
9	CARTIER	8.9	To 7th place	9	TAG HEUER	7.6	
10	BVLGARI	8.1	To 11th place	10	agnes.b.	6.4	
11	HERMES	7.6	To 12th place	11	BVLGARI	6.3	
12	agnes b.	7.1	To 10th place	12	HERMES	6.3	
13	FOLLIFOLLIE	4.6	To 14th place	13	LONGINES	4.7	
14	LONGINES	3.9	To 13th place	14	FOLLI FOLLIE	3.6	
15	DIOR	3.1	－ Ranked out	15	CHANEL	3.2	
16	ck CALVIN KLEIN	2.9	To 23rd place	16	DIESEL	2.7	NEW Brand ※
17	COACH	2.9	To 24th place	17	Paul Smith	2.7	NEW Brand ※
18	TIFFANY	2.8	To 27th place	18	Other Sports Watches	2.4	NEW Brand ※
19	BURBERRY	2.7	→	19	BURBERRY	2.3	
20	RADO	2.6	To 21st place	20	HAMILTON	2.3	
21	DUNHILL	2.5	－ Ranked out	21	RADO	2.2	
22	CHANEL	2.4	To 25th place	22	BREITLING	2.1	
23	HAMILTON	2.3	To 20th place	23	ck CALVIN KLEIN	2.1	
24	BREITLING	2.1	To 22nd place	24	COACH	2.1	
25	FRANCK MULLER	2.0	→	25	FRANCK MULLER	1.7	
26	LOUIS VUITTON	1.9	－ Ranked out	26	NIXON	1.7	NEW Brand ※
				27	TIFFANY	1.7	

* “CASIO” replaced “SEIKO” to rank first.
* The leading three luxury watch brands, “OMEGA”, “ROLEX” and “CARTIER” all moved up in the rankings.
* “Diesel” and “Paul Smith”, which were newly added in this survey, both ranked in among the top 20 brands.

* “NEW brand” is one newly added to the choices effective the 2012 survey.

■Brand of watch owned (by sex)





* In 2012, the top 3 brands were the domestic watch brands of “CASIO”, “SEIKO” and “CITIZEN” as in the previous survey.

* Survey results reveal that “CASIO” and “SEIKO” are popular among male consumers. Meanwhile, “CITIZEN” is owned by both males and females almost evenly.

* In 2012, there were still no significant changes in male and female response rates for each brand. Brands that show a clear difference in proportions between males and females were watch maker brands favored by males, e.g. “CASIO”, “SEIKO”, “OMEGA” and “TAG HEUER” and fashion brands popular among female shoppers, e.g. “CARTIER”, “GUCCI”, “agnes.b”, “BVLGARI”, “HERMES”, “FOLLIFOLLIE” and “CHANEL”.

■Brand of watch owned (by sex and age group): Supplementary data

2010

Brand	Total	Male	Male 20s	Male 30s	Male 40s	Male 50s+	Female	Female 20s	Female 30s	Female 40s	Female 50s+
Number of respondents	1500	750	180	172	219	179	750	170	189	209	182
SEIKO	33.9	39.2	23.9	25.6	47.9	57.0	28.7	15.9	21.7	32.1	44.0
CASIO	30.6	38.3	30.0	40.1	42.0	40.2	22.9	24.1	28.0	23.9	15.4
CITIZEN	24.1	26.7	19.4	19.8	27.9	39.1	21.5	18.2	15.9	23.0	28.6
SWATCH	18.3	14.9	12.2	14.0	20.1	12.3	21.7	11.8	28.6	27.3	17.6
OMEGA	18.1	20.1	11.1	22.7	24.7	21.2	16.1	3.5	16.4	15.3	28.6
ROLEX	16.4	18.5	5.6	18.6	21.9	27.4	14.3	5.3	16.9	18.2	15.4
GUCCI	10.1	4.8	6.7	4.1	2.3	6.7	15.5	12.9	20.6	15.8	12.1
TAG HEUER	9.5	13.5	3.9	12.2	22.4	13.4	5.5	0.6	3.2	12.4	4.4
CARTIER	8.9	4.1	1.7	3.5	4.6	6.7	13.7	8.2	13.8	19.6	12.1
BVLGARI	8.1	6.7	5.6	5.8	8.2	6.7	9.6	5.9	9.5	13.9	8.2
HERMES	7.6	2.1	1.7	1.2	2.7	2.8	13.1	6.5	12.2	16.7	15.9
agnes b.	7.1	4.7	7.8	4.7	3.7	2.8	9.6	14.7	13.8	7.7	2.7
FOLLIFOLLIE	4.6	0.8	2.2	0.6	0.0	0.6	8.4	10.0	8.5	8.1	7.1
LONGINES	3.9	4.9	0.0	2.3	7.3	9.5	2.9	0.6	2.1	3.8	4.9
DIOR	3.1	1.1	1.7	0.0	0.9	1.7	5.2	3.5	4.2	6.2	6.6
ck CALVIN KLEIN	2.9	2.1	2.8	2.3	1.8	1.7	3.6	1.8	2.6	5.3	4.4
COACH	2.9	1.9	1.1	1.7	1.4	3.4	3.9	2.4	4.2	3.3	5.5
TIFFANY	2.8	0.8	0.0	1.7	0.5	1.1	4.8	0.6	7.4	6.2	4.4
BURBERRY	2.7	2.1	1.7	1.2	2.7	2.8	3.2	4.7	1.6	3.3	3.3
RADO	2.6	3.3	0.0	0.6	5.0	7.3	1.9	0.6	0.5	1.4	4.9
DUNHILL	2.5	3.6	1.1	1.2	4.6	7.3	1.3	0.0	0.5	1.9	2.7
CHANEL	2.4	0.9	1.1	0.0	2.3	0.0	3.9	3.5	2.6	5.3	3.8
HAMILTON	2.3	2.4	1.7	1.7	4.1	1.7	2.3	0.6	3.7	4.3	0.0
BREITLING	2.1	3.2	0.6	4.1	5.5	2.2	0.9	0.0	1.1	2.4	0.0
FRANCK MULLER	2.0	2.0	2.8	1.7	2.3	1.1	2.0	1.2	0.5	4.3	1.6
LOUIS VUITTON	1.9	0.9	0.6	1.2	0.5	1.7	2.8	4.1	2.1	2.9	2.2

(Numbers are percentages)

2012

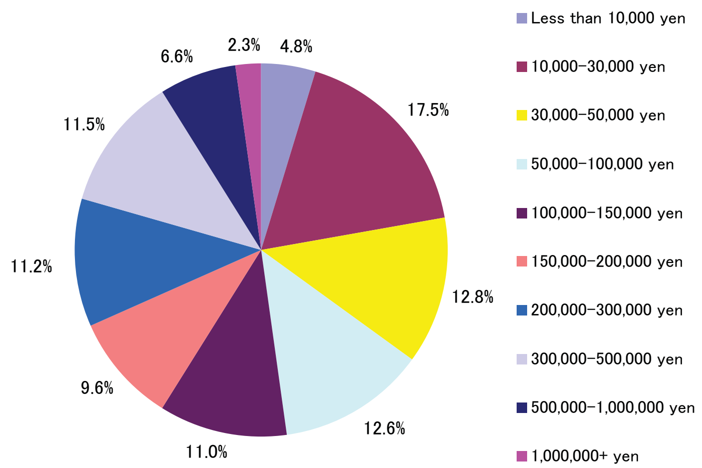
Brand	Total	Male	Male 20s	Male 30s	Male 40s	Male 50s+	Female	Female 20s	Female 30s	Female 40s	Female 50s+
Number of respondents	1500	750	144	216	207	183	750	224	196	175	155
CASIO	28.0	38.1	30.6	43.1	42.5	33.3	17.9	16.1	18.9	21.7	14.8
SEIKO	27.7	32.1	19.4	25.9	30.0	51.9	23.3	15.2	17.3	27.4	38.1
CITIZEN	17.9	19.6	12.5	12.0	21.3	32.2	16.3	12.5	13.8	18.9	21.9
OMEGA	15.0	18.8	8.3	16.7	22.2	25.7	11.2	3.1	7.1	13.1	25.8
ROLEX	14.3	15.6	2.8	16.2	19.3	20.8	13.1	4.9	15.8	18.9	14.8
SWATCH	12.2	10.7	5.6	8.8	16.4	10.4	13.7	11.2	14.8	17.1	12.3
CARTIER	8.4	4.1	0.7	2.8	5.3	7.1	12.7	8.0	15.3	13.7	14.8
GUCCI	7.6	2.8	3.5	2.8	1.4	3.8	12.4	8.0	14.3	16.6	11.6
TAG HEUER	7.6	11.5	2.8	12.0	18.4	9.8	3.7	1.3	2.0	9.7	2.6
agnes.b.	6.4	3.3	2.1	7.4	1.4	1.6	9.5	10.3	14.8	5.1	6.5
BVLGARI	6.3	4.3	3.5	3.2	4.8	5.5	8.3	6.7	5.6	11.4	10.3
HERMES	6.3	2.1	0.0	0.5	1.9	6.0	10.4	4.9	8.2	10.9	20.6
LONGINES	4.7	5.2	0.7	2.3	5.8	11.5	4.3	0.0	2.6	5.7	11.0
FOLLI FOLLIE	3.6	0.3	0.0	0.9	0.0	0.0	6.9	8.5	6.6	5.1	7.1
CHANEL	3.2	1.3	0.0	0.9	1.4	2.7	5.1	2.7	5.1	9.1	3.9
DIESEL	2.7	2.8	8.3	2.3	1.0	1.1	2.5	2.2	3.6	3.4	0.6
Paul Smith	2.7	3.9	5.6	8.3	1.4	0.0	1.5	2.7	1.0	0.6	1.3
その他ｽﾎﾟｰﾂｳｫｯﾁ	2.4	2.4	1.4	3.7	2.4	1.6	2.4	2.2	3.1	1.1	3.2
BURBERRY	2.3	1.6	1.4	0.9	1.9	2.2	3.1	1.8	3.6	3.4	3.9
HAMILTON	2.3	3.1	3.5	3.2	2.4	3.3	1.5	0.4	3.1	1.1	1.3
RADO	2.2	2.5	0.0	1.9	2.4	5.5	1.9	0.4	1.0	2.3	4.5
BREITLING	2.1	3.5	0.7	4.2	2.9	5.5	0.8	0.4	0.5	1.7	0.6
ck CALVIN KLEIN	2.1	1.3	2.1	0.5	2.4	0.5	2.8	2.2	3.6	1.7	3.9
COACH	2.1	0.3	0.0	0.0	0.0	1.1	4.0	2.2	4.6	6.3	3.2
FRANCK MULLER	1.7	1.9	1.4	3.2	1.0	1.6	1.6	1.3	2.0	1.1	1.9
NIXON	1.7	1.3	3.5	1.4	0.5	0.5	2.1	4.0	2.0	0.6	1.3
TIFFANY	1.7	0.8	1.4	0.5	0.0	1.6	2.7	2.2	2.6	2.9	3.2

(Numbers are percentages)

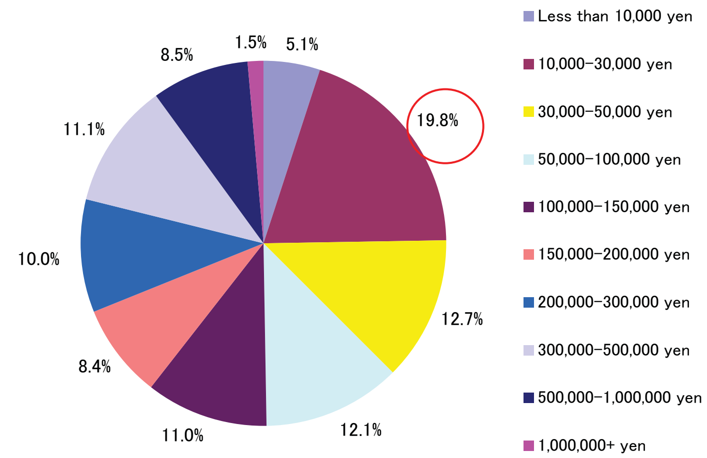
■Purchase price of watch owned (all)

*The list was created based on the “purchase price of favorite watch” out of all watches owned.

Purchase price range of watche owned in 2010: Total（n=1370）



Purchase price range of watche owned in 2012:Total（n=1324）



■Purchase price of watch owned (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2010(n=691)	2012(n=673)	2010（n=161）	2012(n=120)	2010（n=154）	2012(n=197)	2010（n=205）	2012(n=187)	2010（n=171）	2012(n=169)
Less than 10,000 yen	4.1	4.9	6.2	7.5	5.8	6.6	2.0	3.7	2.9	2.4
10,000–30,000 yen	18.4	20.8	29.8	43.3	20.1	22.8	14.1	14.4	11.1	9.5
30,000–50,000 yen	13.0	12.3	20.5	13.3	11.0	11.2	10.7	15.5	10.5	9.5
50,000–100,000 yen	13.7	12.0	14.9	10.0	9.7	8.1	12.2	14.4	18.1	15.4
100,000–150,000 yen	10.7	11.9	6.2	7.5	11.7	12.7	11.2	9.6	13.5	16.6
150,000–200,000 yen	9.6	8.2	5.6	2.5	9.1	8.6	13.2	9.1	9.4	10.7
200,000–300,000 yen	9.6	8.3	6.8	5.0	12.3	6.6	11.2	10.7	7.6	10.1
300,000–500,000 yen	11.4	11.6	6.2	6.7	11.0	14.2	14.6	10.2	12.9	13.6
500,000–1,000,000 yen	6.8	8.6	3.1	4.2	7.8	7.6	8.3	11.2	7.6	10.1
1,000,000+ yen	2.7	1.3	0.6	0.0	1.3	1.5	2.4	1.1	6.4	2.4

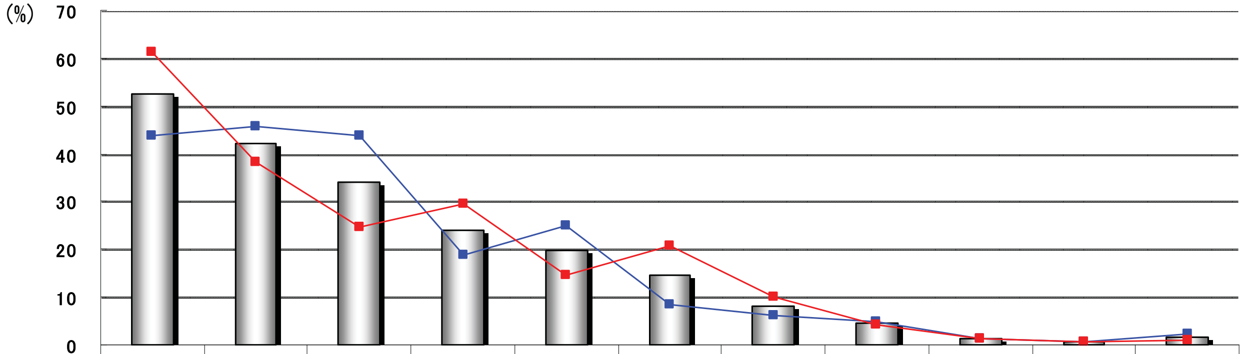
■Purchase price of watch owned (female)

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2010（n=679）	2012（n=651）	2010（n=149）	2012（n=180）	2010（n=171）	2012（n=170）	2010（n=190）	2012（n=156）	2010（n=169）	2012（n=145）
Less than 10,000 yen	5.6	5.2	10.1	10.6	7.6	2.9	3.2	3.8	2.4	2.8
10,000–30,000 yen	16.6	18.7	29.5	30.6	15.8	18.2	13.2	12.2	10.1	11.7
30,000–50,000 yen	12.5	13.1	21.5	17.8	10.5	15.3	10.5	8.3	8.9	9.7
50,000–100,000 yen	11.5	12.1	10.1	15.0	8.8	12.4	10.5	12.2	16.6	8.3
100,000–150,000 yen	11.3	10.0	4.0	7.2	13.5	11.2	12.6	8.3	14.2	13.8
150,000–200,000 yen	9.6	8.6	4.7	2.2	8.8	2.9	12.6	18.6	11.2	12.4
200,000–300,000 yen	13.0	11.7	6.7	6.1	15.2	13.5	14.2	9.6	14.8	18.6
300,000–500,000 yen	11.6	10.6	9.4	4.4	11.1	12.9	15.3	13.5	10.1	12.4
500,000–1,000,000 yen	6.3	8.3	3.4	6.1	7.6	8.2	5.8	12.2	8.3	6.9
1,000,000+ yen	1.9	1.7	0.7	0.0	1.2	2.4	2.1	1.3	3.6	3.4

* “10,000 – 30,000 yen” still is the most popular answer for the purchase price of the favorite watch owned and accounts for 19.8%, up 2.3 points from 2010.
* There are clusters of responses in “10,000 – 100,000 yen” with a concentration in “10,000 – 30,000 yen” for both males and females.
* Response rates of “100,000+ yen” increased in proportion to age for both males and females. Approximately half of males in their 30s and 40s and of females in their 30s, and about 60% of males aged 50+ and females in their 40s and 50+ chose this range.

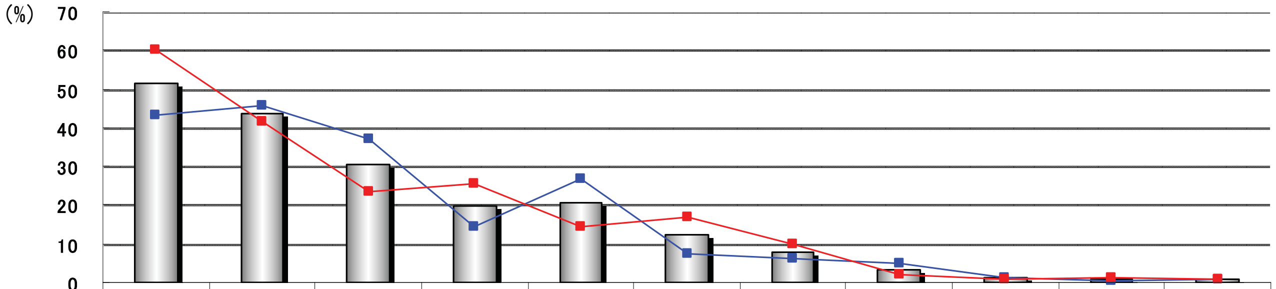
■Location of purchase (all)

2010



	Watch section at a department	Watch and clock specialty	Mass retailer; discount store	Duty free shop; overseas	Online shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Total (n = 1500)	52.5	42.0	34.1	24.1	19.7	14.5	8.1	4.5	1.3	0.7	1.6
Male (n = 750)	43.7	45.7	43.6	18.7	24.8	8.4	6.0	4.9	1.3	0.8	2.3
Female (n = 750)	61.2	38.3	24.7	29.6	14.7	20.7	10.1	4.1	1.2	0.7	0.9

2012

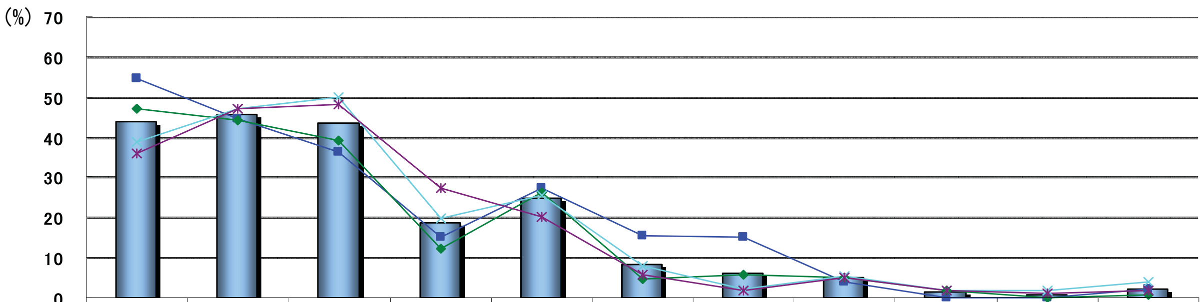


	Watch section at a department	Watch and clock specialty	Mass retailer; discount store	Duty free shop; overseas	Online shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Total(n=1500)	51.6	43.7	30.4	19.9	20.6	12.2	7.9	3.4	1.1	0.9	0.9
Male(n=750)	43.1	45.7	37.2	14.3	26.7	7.5	6.1	4.8	1.3	0.5	0.9
Female(n=750)	60.1	41.7	23.6	25.5	14.5	16.9	9.7	2.0	0.8	1.2	0.9

* “Watch section at a department store” remained the most popular response in the 2012 survey, and the purchase rate among female shoppers was high.
* For male consumers, “Watch and clock specialty store; jewelry store” is the most popular, followed by “Mass retailer; discount store” and “Online shop”. Females prefer, in addition to “Watch section at a department store”, “Duty free shop; overseas” and “Brand boutique”.

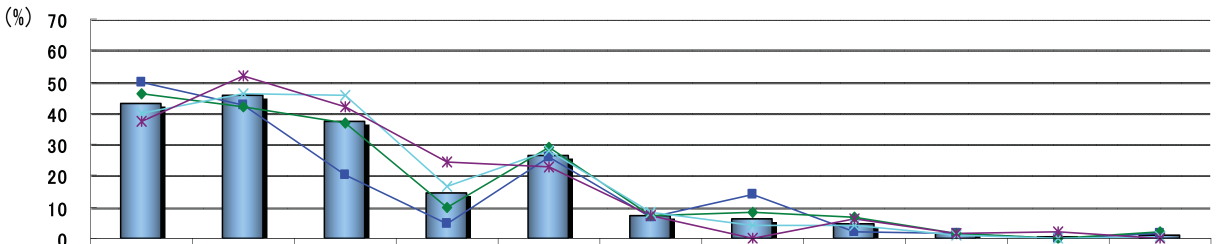
■Location of purchase (male)

2010



	Watch section at a department	Watch and clock specialty	Mass retailer; discount store	Duty free shop; overseas	Online shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Male (n = 750)	43.7	45.7	43.6	18.7	24.8	8.4	6.0	4.9	1.3	0.8	2.3
Male 20s (n = 180)	54.4	44.4	36.1	15.0	27.2	15.6	15.0	3.9	0.0	0.0	2.2
Male 30s (n = 172)	47.1	44.2	39.0	12.2	26.2	4.7	5.8	5.2	1.7	0.0	0.6
Male 40s (n = 219)	38.8	47.0	49.8	19.6	25.6	7.8	2.3	5.5	1.8	1.8	4.1
Male 50s+ (n = 179)	35.8	46.9	48.0	27.4	20.1	5.6	1.7	5.0	1.7	1.1	1.7

2012

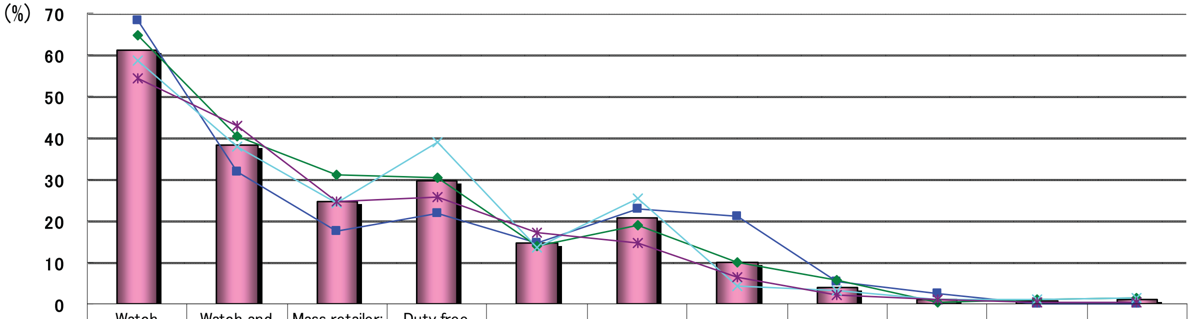


	Watch section at a department	Watch and clock specialty	Mass retailer; discount store	Duty free shop; overseas	Online shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Male (n=750)	43.1	45.7	37.2	14.3	26.7	7.5	6.1	4.8	1.3	0.5	0.9
Male20s (n=144)	50.0	42.4	20.1	4.9	25.7	6.9	13.9	2.1	1.4	0.0	1.4
Male30s (n=216)	46.3	42.1	36.6	9.7	29.2	7.4	8.3	6.5	1.4	0.0	1.9
Male40s (n=207)	40.1	46.4	45.4	16.4	28.0	8.2	3.9	3.9	1.0	0.0	0.5
Male50s+ (n=183)	37.2	51.9	42.1	24.6	23.0	7.1	0.0	6.0	1.6	2.2	0.0

* “Watch section of a department store” was the most popular among respondents in their 20s. It is highly likely that consumers purchase watches while shopping for other items, and a watch is considered to be a major fashion item.
* The higher the age group, the higher the response rate for “Watch and clock specialty; jewelry store” where consumers usually shop with “the intention to purchase”.
* While “Internet (Online shops)” is used primarily by survey samples in their 30s and 40s, they are also attracting an increasing number of those aged 50+.

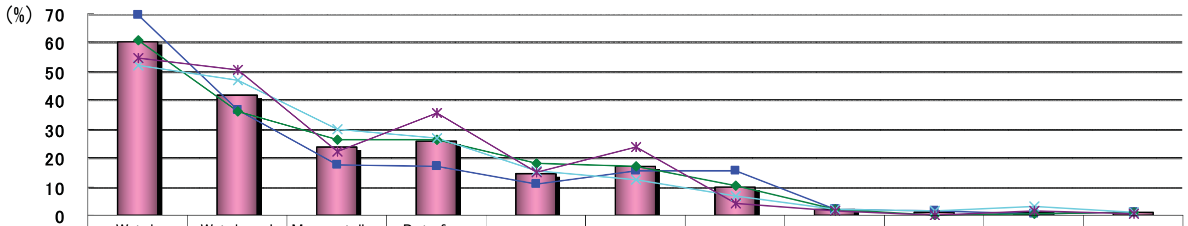
■Location of purchase (female)

2010



	Watch section at a department	Watch and clock specialty	Mass retailer; discount store	Duty free shop; overseas	Online shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Female (n = 750)	61.2	38.3	24.7	29.6	14.7	20.7	10.1	4.1	1.2	0.7	0.9
Female 20s (n = 170)	68.2	31.8	17.6	21.8	14.7	22.9	21.2	5.3	2.4	0.0	0.0
Female 30s (n = 189)	64.6	40.2	31.2	30.2	13.8	19.0	10.1	5.8	0.5	1.1	1.6
Female 40s (n = 209)	58.4	37.8	24.4	38.8	13.4	25.4	4.3	3.3	1.0	1.0	1.4
Female 50s+ (n = 182)	54.4	42.9	24.7	25.8	17.0	14.8	6.6	2.2	1.1	0.5	0.5

2012

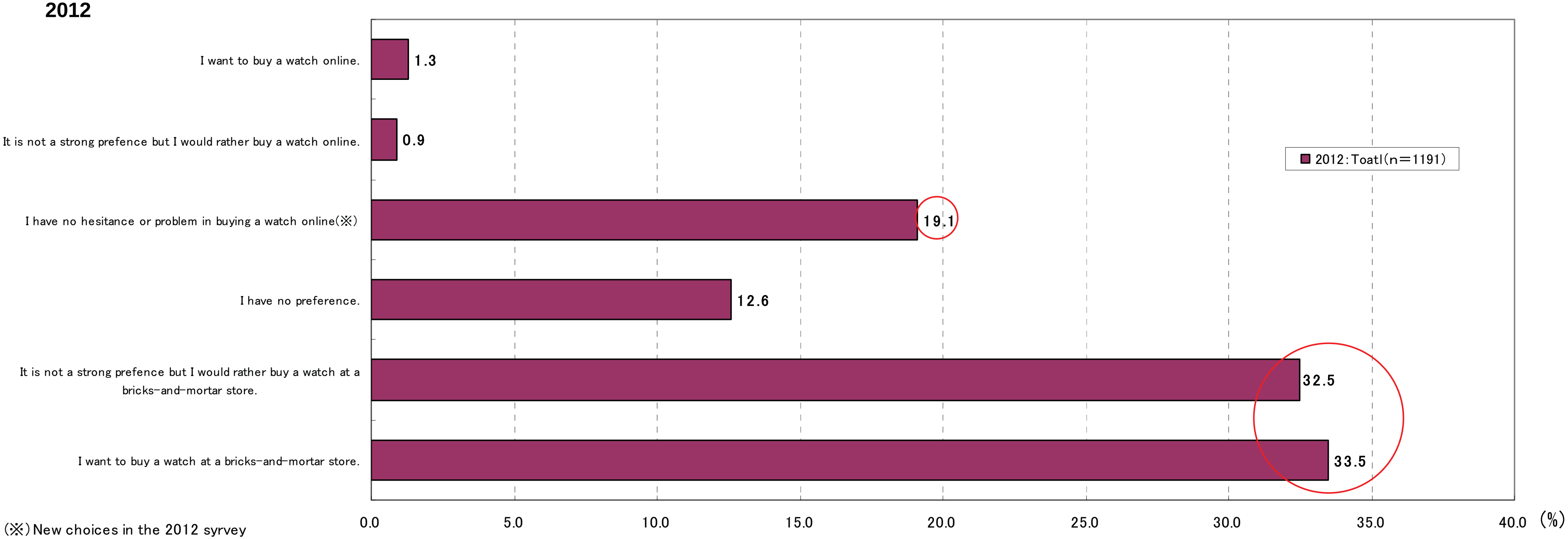


	Watch section at a department	Watch and clock specialty	Mass retailer; discount store	Duty free shop; overseas	Online shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Female(n=750)	60.1	41.7	23.6	25.5	14.5	16.9	9.7	2.0	0.8	1.2	0.9
Female20s(n=224)	69.6	36.6	17.4	17.0	10.7	15.6	15.6	2.2	1.3	0.4	0.9
Female30s(n=196)	60.7	36.2	26.5	26.0	17.9	16.8	10.2	2.0	0.0	0.5	1.0
Female40s(n=175)	52.0	46.9	29.7	26.9	15.4	12.6	6.9	2.3	1.7	2.9	1.1
Female50s+(n=155)	54.8	50.3	21.9	35.5	14.8	23.9	3.9	1.3	0.0	1.3	0.6

* “Watch section of a department store” is a popular choice across all male age groups and is overall driven by females in their 20s.
* Online shopping on the “Internet” is expanding primarily among consumers in their 30s and 40s.

■Willingness to purchase watches online

*We asked "those who have not purchased watches online" about their willingness to purchase online in the future.

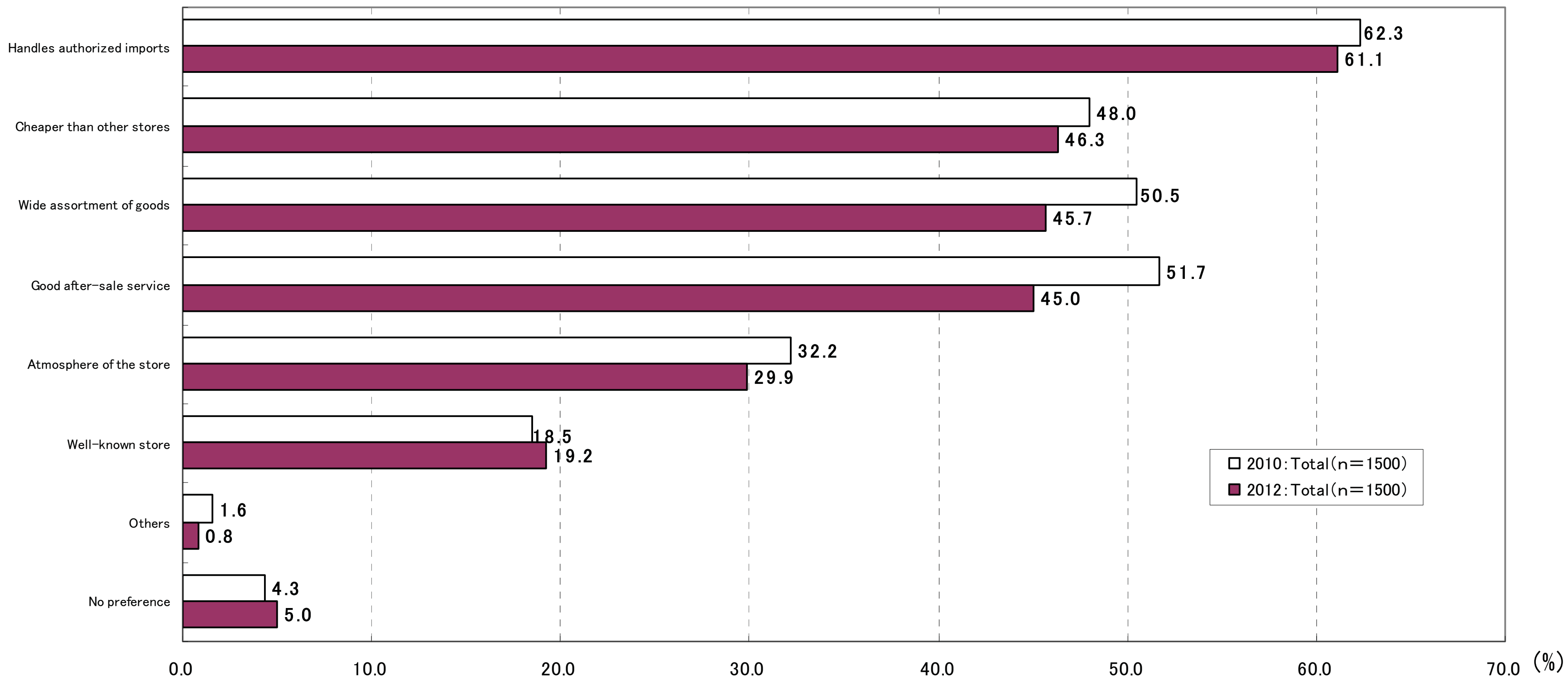


(※) New choices in the 2012 syrvey

	Male 2012(n=550)	Female 2012(n=641)
I want to buy a watch online.	2.7	0.2
It is not a strong prefence but I would rather buy a watch online.	1.3	0.6
I have no hesitance or problem in buying a watch online	23.6	15.3
I have no preference.	16.0	9.7
It is not a strong prefence but I would rather buy a watch at a bricks-and-mortar store.	27.6	36.7
I want to buy a watch at a bricks-and-mortar store.	28.7	37.6

* Again in 2012, the majority of survey samples preferred to shop at bricks-and-mortar stores. Those who responded, "It is not a strong preference but I would rather buy a watch at a bricks-and-mortar store" and "I want to buy a watch at a bricks-and-mortar store" accounted for 66% of the total.
* Meanwhile, "I have no hesitance or problem in buying a watch online" accounted for approximately 20% of the total. This suggests that the Internet can serve as a sales channel depending on how products are distributed and consumers are attracted.

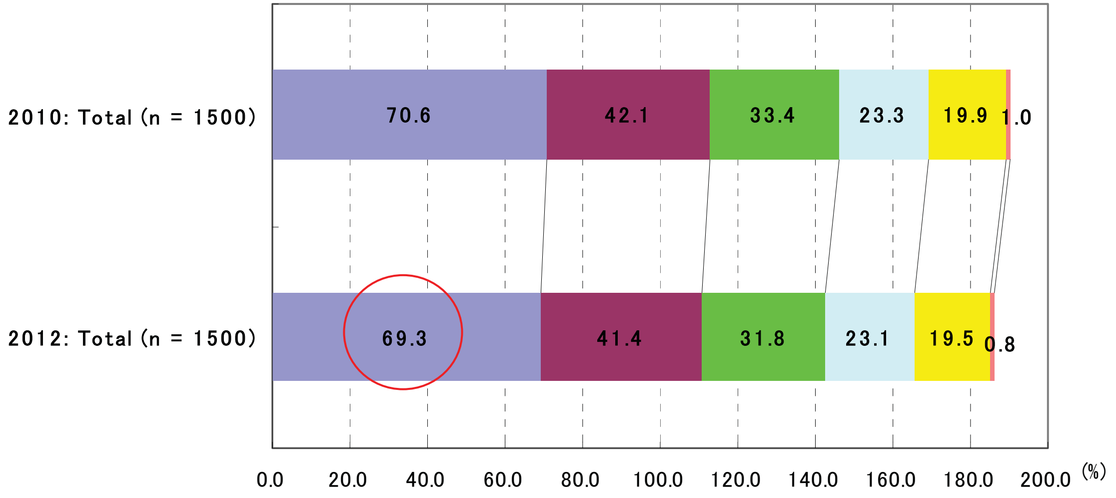
■Important factors in choosing a retailer



	Male		Female	
	2010(n=750)	2012(n=750)	2010(n=750)	2012(n=750)
Handles authorized imports	57.1	55.6	67.6	66.7
Cheaper than other stores	53.7	53.5	42.3	39.2
Wide assortment of goods	47.5	42.5	53.5	48.9
Good after-sale service	44.3	41.2	59.2	48.8
Atmosphere of the store	25.7	23.3	38.7	36.5
Well-known store	16.1	16.0	20.8	22.4
Others	1.6	1.2	1.6	0.4
No preference	5.6	6.0	2.9	4.0

* “Handles authorized imports” was the most popular response among both men and women as in the previous survey.
* Male consumers tend to ‘value price’ more than females.
* Among females, the tendency to emphasize “Good after-sale service” and “Atmosphere of the store” is stronger than in males, which indicates that elements other than the product itself are also important for female shoppers in selecting stores.

■Favorite type of watch (all)



■Favorite type of watch (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2010(n=750)	2012(n=750)	2010(n=180)	2012(n=144)	2010(n=172)	2012(n=216)	2010(n=219)	2012(n=207)	2010(n=179)	2012(n=183)
Classic/standard	71.3	69.1	74.4	64.6	74.4	72.7	67.1	67.6	70.4	69.9
Fashion watch	25.1	22.0	41.1	34.7	25.0	19.9	17.8	20.3	17.9	16.4
Sports watch	44.8	44.7	33.3	30.6	48.3	45.8	56.2	58.0	39.1	39.3
Multifunction watch	32.7	33.2	26.7	30.6	29.1	30.6	37.0	37.2	36.9	33.9
Jewelry watch	4.3	4.7	5.6	6.9	3.5	1.4	5.0	6.8	2.8	4.4
Others	1.3	1.1	0.6	1.4	2.3	1.4	0.5	0.5	2.2	1.1

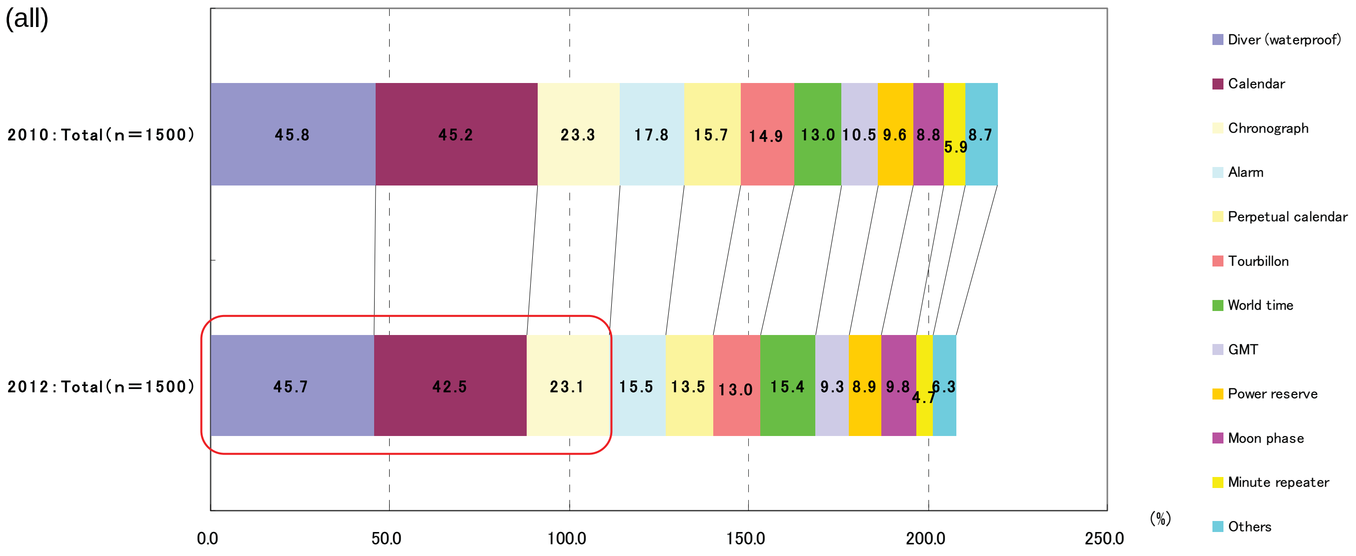
■Favorite type of watch (female)

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2010(n=750)	2012(n=750)	2010(n=170)	2012(n=224)	2010(n=189)	2012(n=196)	2010(n=209)	2012(n=175)	2010(n=182)	2012(n=155)
Classic/standard	69.9	69.5	72.9	65.2	70.9	70.9	73.2	71.4	62.1	71.6
Fashion watch	59.1	60.8	71.8	75.0	62.4	58.7	56.5	54.3	46.7	50.3
Sports watch	22.0	18.9	16.5	17.4	28.6	18.4	27.3	24.0	14.3	16.1
Multifunction watch	13.9	13.1	13.5	10.7	11.6	11.7	14.8	13.7	15.4	17.4
Jewelry watch	35.6	34.3	33.5	33.9	34.4	37.2	38.8	34.9	35.2	30.3
Others	0.7	0.5	0.6	0.9	0.5	0.0	1.0	0.6	0.5	0.6

- "Classic/standard" was overall the most popular choice, selected by roughly 70% of male and female samples.

* Men tend to prefer "Sports watches" and "Multifunction watches" while women favor "Fashion watches" and "Jewelry watches".
* "Multifunction watches", popular among males and "Fashion watches" and "Jewelry watches", which are popular among females, were preferred by all ages respectively.
* Meanwhile, males particularly in their 30s and 40s prefer "Sports watches".

■Favorite function of watch (all)



■Favorite function of watch (male)

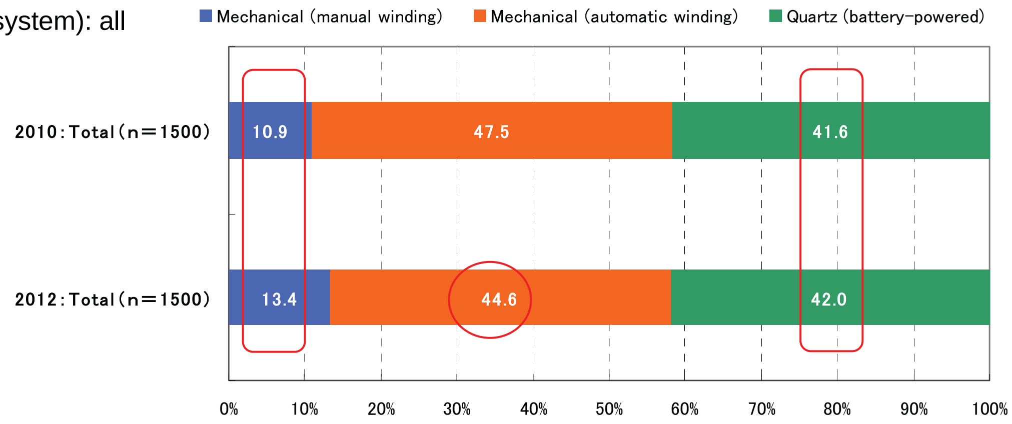
	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2010(n=750)	2012(n=750)	2010(n=180)	2012(n=144)	2010(n=172)	2012(n=216)	2010(n=219)	2012(n=207)	2010(n=179)	2012(n=183)
Diver (waterproof)	51.7	54.3	49.4	45.8	43.0	56.5	65.3	64.3	45.8	47.0
Calendar	55.1	50.8	45.0	41.0	51.7	48.1	58.9	52.2	63.7	60.1
Chronograph	35.1	36.5	33.9	31.3	40.1	42.1	39.7	38.6	25.7	31.7
Alarm	20.1	17.1	18.9	18.8	20.9	15.3	18.3	18.4	22.9	16.4
Perpetual calendar	20.5	18.5	18.3	11.1	17.4	16.2	21.5	21.7	24.6	23.5
Tourbillon	13.3	11.9	18.3	15.3	9.9	12.0	12.8	10.1	12.3	10.9
World time	13.5	16.1	20.0	18.8	9.9	16.2	11.9	12.6	12.3	18.0
GMT	12.9	8.9	11.7	6.3	11.0	10.2	16.4	10.1	11.7	8.2
Power reserve	13.6	12.7	12.8	13.9	18.0	14.4	12.8	8.2	11.2	14.8
Moon phase	8.7	8.7	9.4	9.0	7.6	5.1	10.0	10.1	7.3	10.9
Minute repeater	6.3	6.5	3.9	4.2	4.1	3.2	9.1	8.7	7.3	9.8
Others	6.3	4.0	3.3	1.4	5.2	4.6	5.5	3.9	11.2	5.5

■Favorite function of watch (female)

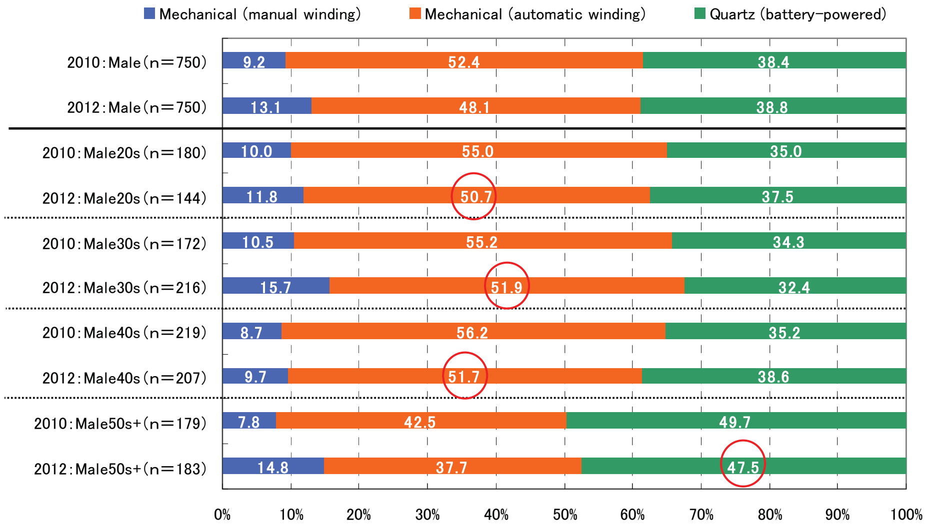
	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2010(n=750)	2012(n=750)	2010(n=170)	2012(n=224)	2010(n=189)	2012(n=196)	2010(n=209)	2012(n=175)	2010(n=182)	2012(n=155)
Diver (waterproof)	39.9	37.1	41.2	42.0	41.8	29.6	45.9	40.0	29.7	36.1
Calendar	35.3	34.3	38.2	33.0	38.6	40.3	33.5	30.3	31.3	32.9
Chronograph	11.5	9.7	12.4	9.8	15.3	9.2	11.0	9.7	7.1	10.3
Alarm	15.5	14.0	15.3	13.8	13.8	11.2	17.7	13.7	14.8	18.1
Perpetual calendar	10.8	8.5	10.6	6.7	9.5	6.1	11.0	12.0	12.1	10.3
Tourbillon	16.4	14.1	18.2	13.4	14.8	13.3	15.3	16.0	17.6	14.2
World time	12.5	14.7	17.6	16.5	10.1	12.8	11.0	16.6	12.1	12.3
GMT	8.0	9.6	8.2	8.5	10.1	9.7	6.7	10.9	7.1	9.7
Power reserve	5.6	5.2	5.9	3.1	4.8	7.1	3.3	5.1	8.8	5.8
Moon phase	8.9	10.9	8.8	11.6	9.0	9.7	11.0	10.3	6.6	12.3
Minute repeater	5.6	2.9	2.4	4.0	6.9	0.0	6.7	2.9	6.0	5.2
Others	11.1	8.5	9.4	6.3	6.9	9.7	12.9	7.4	14.8	11.6

* “Diver (waterproof)”, “Calendar” and “Chronograph” ranked high as the favorite function of a watch as in the previous survey.
* In the 2012 survey, “World time” and “Moon phase” increased 2.4 points and 1.0 point respectively compared to the results in 2010.
* Male respondents often indicated “preference for a wide range of functionality”. Female samples also highly favored “Divers (waterproof)” and “Calendar”.

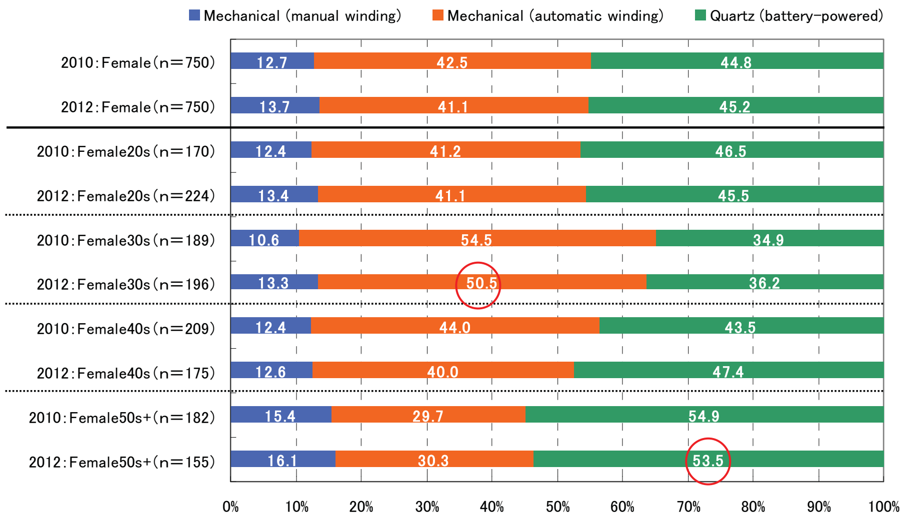
■Favorite movement of watch (drive system): all



■Favorite movement of watch (drive system): male



■Favorite movement of watch (drive system): female

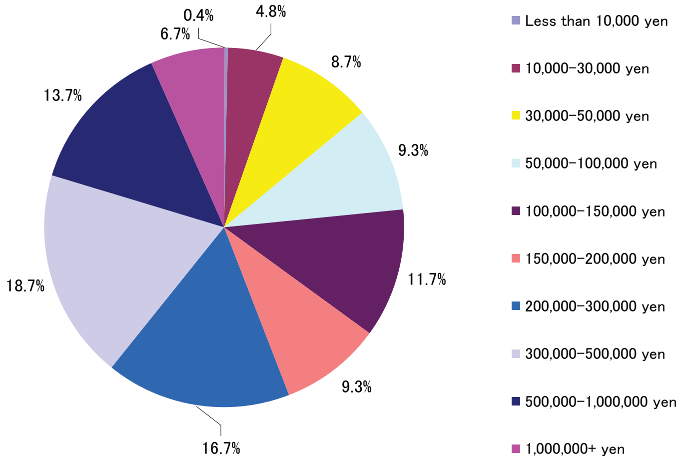


* “Mechanical (automatic winding)” remained the top response in 2012. Meanwhile, “Mechanical (manual winding)” and “Quartz (battery-powered)” increased somewhat.
* “Mechanical (automatic winding)” was popular among males in their 20s through 40s and females in their 30s. “Quartz (battery-powered)” was most favored by males and females aged 50 and above.
* “Mechanical (manual winding)” rose in all age groups in both males and females. This may be an indication that the “mechanical boom” is further pushing “diversification of needs”.

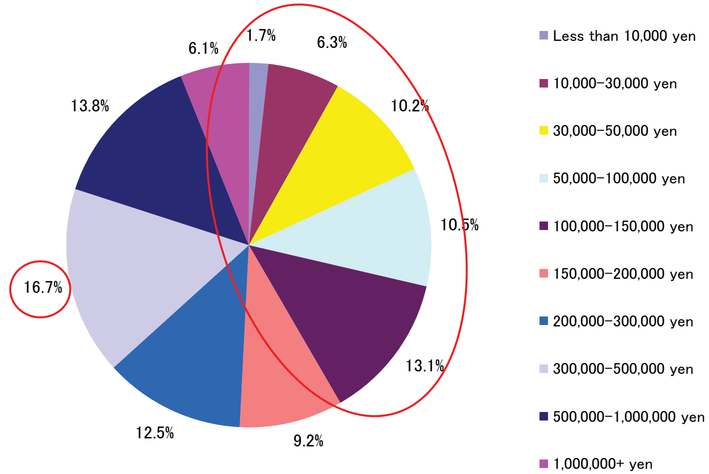
■Price range of watch you want to buy (all)

*The list was created based on the “purchase price of the watch you want the most” out of all watches.

2010 price range of watch you want to buy: Total (n = 1040)



2012 price range of watch you want to buy: Total (n = 1305)



■Price range of watch you want to buy (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2010(n=544)	2012(n=664)	2010(n=142)	2012(n=125)	2010(n=130)	2012(n=194)	2010(n=152)	2012(n=186)	2010(n=120)	2012(n=159)
Less than 10,000 yen	0.4	1.5	0.7	1.6	0.0	2.6	0.7	1.6	0.0	0.0
10,000–30,000 yen	5.1	6.3	4.9	16.0	6.2	6.2	5.3	5.4	4.2	0.0
30,000–50,000 yen	7.9	7.7	12.7	11.2	5.4	6.2	6.6	7.0	6.7	7.5
50,000–100,000 yen	9.0	10.4	10.6	14.4	9.2	10.3	7.2	8.1	9.2	10.1
100,000–150,000 yen	12.7	14.5	12.7	14.4	16.9	14.9	8.6	13.4	13.3	15.1
150,000–200,000 yen	9.0	8.6	12.7	6.4	9.2	10.3	7.2	7.5	6.7	9.4
200,000–300,000 yen	16.2	10.1	13.4	11.2	15.4	9.3	23.7	8.6	10.8	11.9
300,000–500,000 yen	18.0	18.1	10.6	12.0	20.8	21.6	19.1	19.9	22.5	16.4
500,000–1,000,000 yen	13.8	16.0	15.5	9.6	11.5	14.4	12.5	19.9	15.8	18.2
1,000,000+ yen	7.9	6.9	6.3	3.2	5.4	4.1	9.2	8.6	10.8	11.3

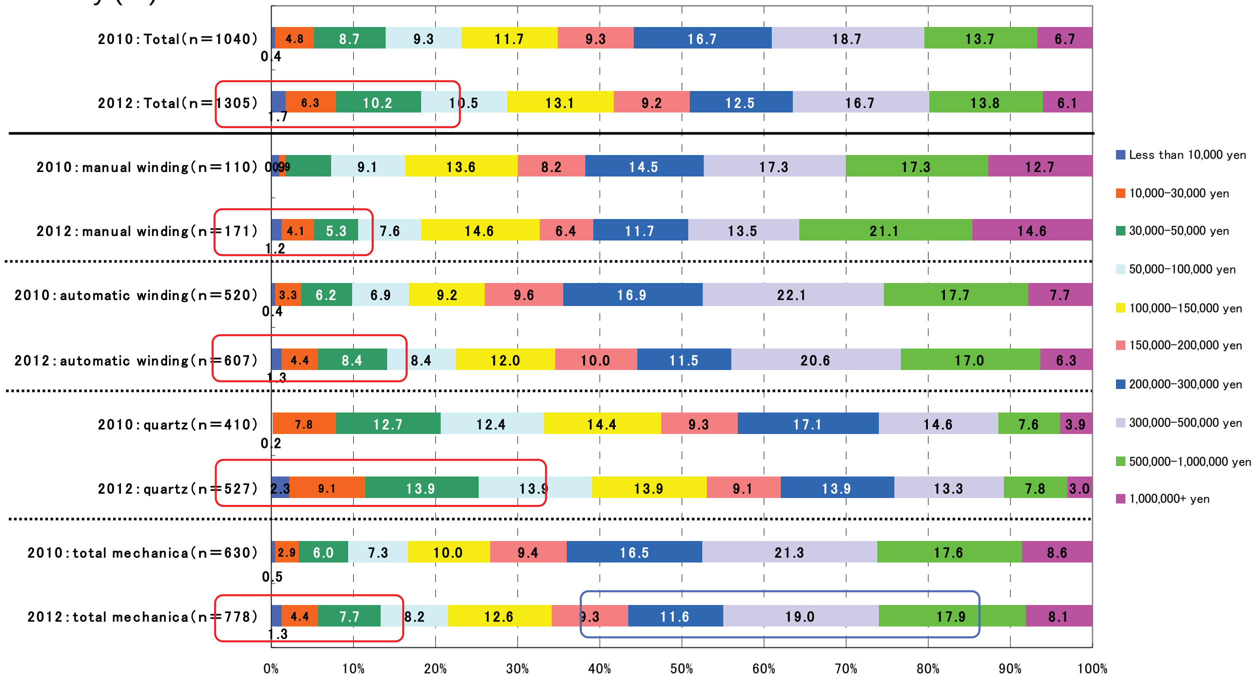
■Price range of watch you want to buy (female)

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2010(n=496)	2012(n=641)	2010(n=127)	2012(n=194)	2010(n=127)	2012(n=171)	2010(n=140)	2012(n=152)	2010(n=102)	2012(n=124)
Less than 10,000 yen	0.4	1.9	1.6	3.1	0.0	1.2	0.0	2.0	0.0	0.8
10,000–30,000 yen	4.4	6.2	11.8	12.4	2.4	3.5	2.1	3.9	1.0	3.2
30,000–50,000 yen	9.5	12.8	18.1	21.6	7.1	10.5	6.4	7.9	5.9	8.1
50,000–100,000 yen	9.7	10.6	11.8	13.4	11.0	10.5	5.0	7.9	11.8	9.7
100,000–150,000 yen	10.7	11.7	9.4	9.3	7.1	15.2	14.3	13.2	11.8	8.9
150,000–200,000 yen	9.7	9.8	5.5	8.2	11.8	9.4	12.9	8.6	7.8	14.5
200,000–300,000 yen	17.3	15.0	8.7	7.2	17.3	15.8	20.0	21.1	24.5	18.5
300,000–500,000 yen	19.4	15.3	18.9	11.3	23.6	18.1	18.6	17.1	15.7	15.3
500,000–1,000,000 yen	13.5	11.5	9.4	8.8	14.2	11.7	16.4	13.2	13.7	13.7
1,000,000+ yen	5.4	5.1	4.7	4.6	5.5	4.1	4.3	5.3	7.8	7.3

* The price range of “10,000 – 150,000 yen” will expand going forward as the purchase price of the watch a consumer wants. Further “lowering of purchase price” appears to be taking place overall.
* Among the male samples, “300,000 – 500,000 yen” was the top response, followed by “500,000 – 1,000,000 yen” and “100,000 – 150,000 yen”. Among females, “300,000 – 500,000 yen” was the highest, followed by “200,000 – 300,000 yen” and “30,000 – 50,000 yen” in this order.
* As a result, generally for users interested in watches costing 100,000 yen or above, the price range of “affordable luxury watches” that they “want to buy” is “300,000 – 500,000 yen”. It is also apparent that male consumers are willing to pay one range higher to buy the watch they want.

■Price range of watch by function you want to buy (all)

*The list was created based on the “purchase price of the watch consumers wanted the most” out of all watches.



■Price range of watch by function you want to buy (male)

	Total male		Male: manual winding		Male: automatic winding		Male: quartz		Male: total mechanical	
	2010(n=544)	2012(n=664)	2010(n=50)	2012(n=85)	2010(n=300)	2012(n=338)	2010(n=194)	2012(n=241)	2010(n=350)	2012(n=423)
Less than 10,000 yen	0.4	1.5	0.0	2.4	0.3	1.2	0.5	1.7	0.3	1.4
10,000–30,000 yen	5.1	6.3	0.0	3.5	2.0	4.1	11.3	10.4	1.7	4.0
30,000–50,000 yen	7.9	7.7	6.0	2.4	5.0	5.9	12.9	12.0	5.1	5.2
50,000–100,000 yen	9.0	10.4	8.0	7.1	7.3	8.0	11.9	14.9	7.4	7.8
100,000–150,000 yen	12.7	14.5	20.0	16.5	9.7	11.8	15.5	17.4	11.1	12.8
150,000–200,000 yen	9.0	8.6	6.0	5.9	10.7	9.2	7.2	8.7	10.0	8.5
200,000–300,000 yen	16.2	10.1	18.0	5.9	17.3	8.6	13.9	13.7	17.4	8.0
300,000–500,000 yen	18.0	18.1	16.0	12.9	21.0	23.4	13.9	12.4	20.3	21.3
500,000–1,000,000 yen	13.8	16.0	12.0	28.2	17.7	19.5	8.2	6.6	16.9	21.3
1,000,000+ yen	7.9	6.9	14.0	15.3	9.0	8.3	4.6	2.1	9.7	9.7

■Price range of watch by function you want to buy (female)

	Total female		Female: manual winding		Female: automatic winding		Female: quartz		Female: total mechanical	
	2010(n=496)	2012(n=641)	2010(n=60)	2012(n=86)	2010(n=220)	2012(n=269)	2010(n=216)	2012(n=286)	2010(n=280)	2012(n=355)
Less than 10,000 yen	0.4	1.9	1.7	0.0	0.5	1.5	0.0	2.8	0.7	1.1
10,000–30,000 yen	4.4	6.2	1.7	4.7	5.0	4.8	4.6	8.0	4.3	4.8
30,000–50,000 yen	9.5	12.8	5.0	8.1	7.7	11.5	12.5	15.4	7.1	10.7
50,000–100,000 yen	9.7	10.6	10.0	8.1	6.4	8.9	13.0	12.9	7.1	8.7
100,000–150,000 yen	10.7	11.7	8.3	12.8	8.6	12.3	13.4	10.8	8.6	12.4
150,000–200,000 yen	9.7	9.8	10.0	7.0	8.2	11.2	11.1	9.4	8.6	10.1
200,000–300,000 yen	17.3	15.0	11.7	17.4	16.4	15.2	19.9	14.0	15.4	15.8
300,000–500,000 yen	19.4	15.3	18.3	14.0	23.6	17.1	15.3	14.0	22.5	16.3
500,000–1,000,000 yen	13.5	11.5	21.7	14.0	17.7	13.8	6.9	8.7	18.6	13.8
1,000,000+ yen	5.4	5.1	11.7	14.0	5.9	3.7	3.2	3.8	7.1	6.2

* Respondent ratios increased in price ranges below 100,000 yen for each type of movement. In particular, the lowering of prices for “Quartz (battery-powered)” among females was evident.

* In “total mechanical”, “200,000 – 1,000,000 yen”, which is considered to be the volume zone, decreased by 6.9 points from 2010 and reflected a further lowering of purchase prices.

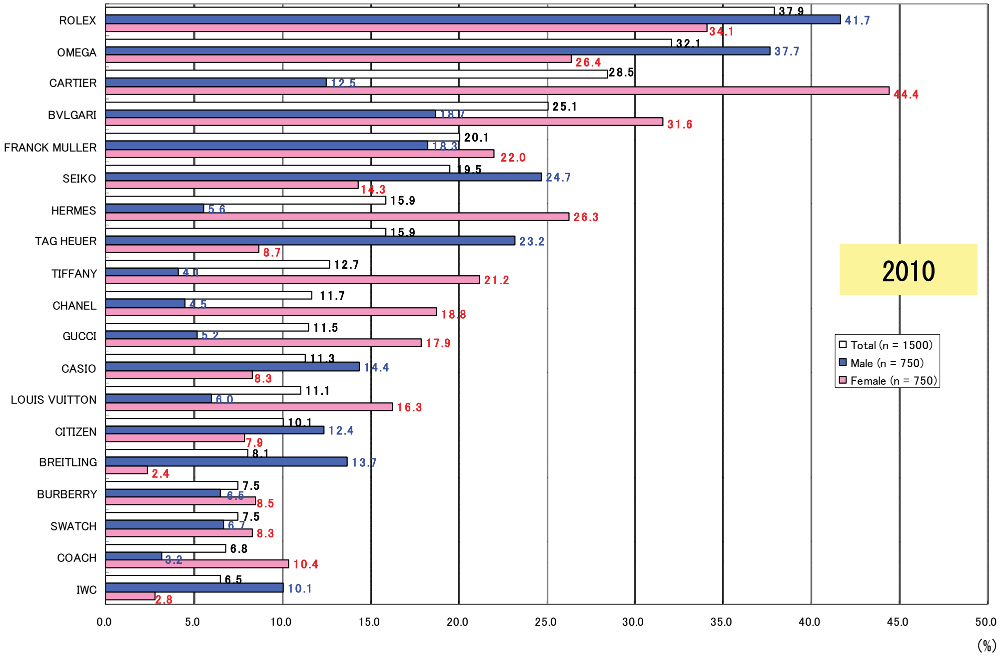
■Brand of watch you want (ranking comparison 2010-2012)

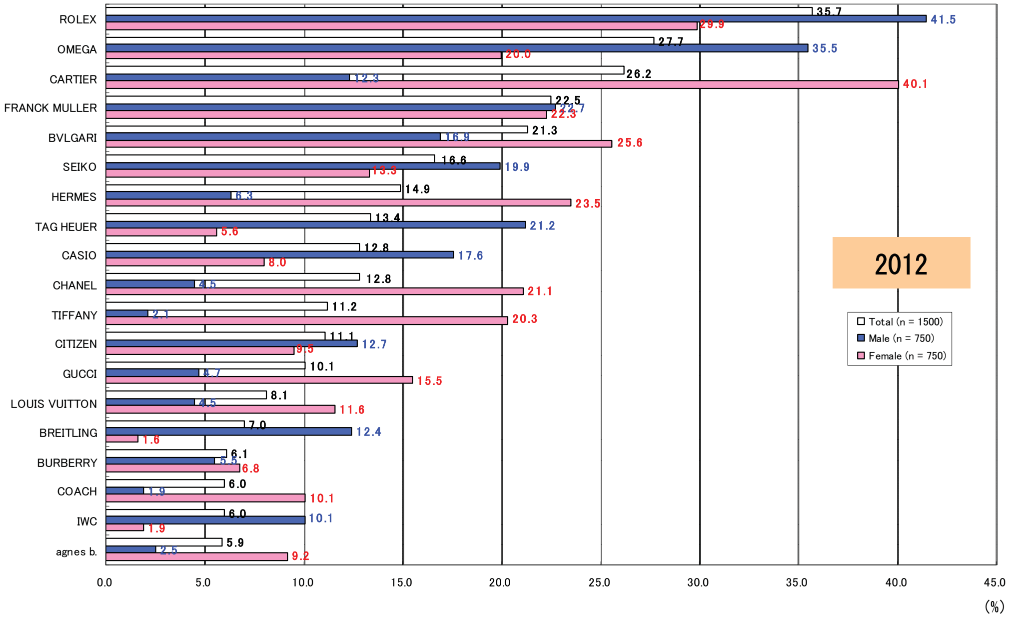
2010 Order	2010 Brand	2010 Total n=1500	Change		2012 Order	2012 Brand	2012 Total n=1500		
1	ROLEX	37.9	→		1	ROLEX	35.7		
2	OMEGA	32.1	→		2	OMEGA	27.7		
3	CARTIER	28.5	→		3	CARTIER	26.2		
4	BVLGARI	25.1	↘	To 5th place	4	FRANCK MULLER	22.5		
5	FRANCK MULLER	20.1	↗	To 4th place	5	BVLGARI	21.3		
6	SEIKO	19.5	→		6	SEIKO	16.6		
7	HERMES	15.9	→		7	HERMES	14.9		
8	TAG HEUER	15.9	→		8	TAG HEUER	13.4		
9	TIFFANY	12.7	↘	To11th place	9	CASIO	12.8		
10	CHANEL	11.7	→		10	CHANEL	12.8		
11	GUCCI	11.5	↘	To13th place	11	TIFFANY	11.2		
12	CASIO	11.3	↗	To 9th place	12	CITIZEN	11.1		
13	LOUIS VUITTON	11.1	↘	To14th place	13	GUCCI	10.1		
14	CITIZEN	10.1	↗	To12th place	14	LOUIS VUITTON	8.1		
15	BREITLING	8.1	→		15	BREITLING	7.0		
16	BURBERRY	7.5	→		16	BURBERRY	6.1		
17	SWATCH	7.5	↘	To21st place	17	COACH	6.0		
18	COACH	6.8	↗	To17th place	18	IWC	6.0		
19	IWC	6.5	↗	To18th place	19	agnes b.	5.9		
20	CHOPARD	6.1	–	Ranked out	20	DIOR	5.5		
21	agnes b.	5.9	↗	To19th place	21	SWATCH	5.5		
22	HARRY WINSTON	5.7	→	To22nd place	22	HARRY WINSTON	5.3		
23	PIAGET	5.7	–	Ranked out	23	FOLLI FOLLIE	5.2		
24	FOLLI FOLLIE	5.6	↗	To23rd place	24	PATEK PHILIPPE	5.1		
25	DIOR	5.5	↗	To20th place	25	HAMILTON	4.8	Ranked in	
26	AUDEMARS PIGUET	5.0	↘	To27th place	26	Paul Smith	4.8	NEW Brand	※
27	PATEK PHILIPPE	4.5	↗	To24th place	27	AUDEMARS PIGUET	4.7		
					28	DIESEL	4.7	NEW Brand	※
					29	Marc by Marc Jacobs	4.7	NEW Brand	※

* With “ROLEX”, “OMEGA” and “CARTIER” maintaining the top three positions, there was no major change in ranking down to the 8th place.
* Brands that moved up significantly were “DIOR”: +5 notches, “CASIO”: +3 notches and “PATEK PHILIPPE”: +3 notches.
* In 2012, replacing “CHOPARD” and “PIAGET” was “HAMILTON” which newly appeared in the ranking. “Paul Smith”, “DIESEL” and “Marc by Marc Jacobs” which were newly added as choices in the survey, ranked in among the top 30 brands. Reasonably priced luxury mechanical watches and lifestyle-proposing brand watches attracted greater popularity.

* “NEW brand” is one newly added to the choices effective the 2012 survey.

■Brand of the watch you want (by sex)





* There was strong demand for “ROLEX” and “OMEGA” as the desired watch from both male and female respondents in 2012 as in the previous survey.

* Top 5 watch brands that males want in 2012:
1st: “ROLEX” 41.5% (down 0.2 points from 2010) <2010 ranking: 1st>
2nd: “OMEGA” 35.5% (down 2.2 points from 2010) <2010 ranking: 2nd>
3rd: “FRANCK MULLER” 22.7% (up 4.4 points from 2010) <2010 ranking: 6th>
4th: ”TAG HEUER” 21.2% (down 2.0 points from 2010) <2010 ranking: 4th>
5th: “SEIKO” 19.9% (down 4.8 points from 2010) <2010 ranking: 3rd>

* Top 5 watch brands that females want in 2012:
1st: “CARTIER” 40.1% (down 4.3 points from 2010) <2010 ranking: 1st>
2nd: “ROLEX” 29.9% (down 4.2 points from 2010) <2010 ranking: 2nd>
3rd: “BVLGARI” 25.6% (down 6.0 points from 2010) <2010 ranking: 3rd>
4th: ”HERMES” 23.5% (down 2.8 points from 2010) <2010 ranking: 5th>
5th: ”FRANCK MULLER” 22.3% (up 0.3 points from 2010) <2010 ranking: 6th>

* Results of the 2012 survey again suggest that in addition to the popularity of standard brands, men prefer “Luxury mechanical sports watches” that offer high cost performance, and women continue to have high needs for “Luxury fashion brand watches”. The trends in the actual market, however, are shifting further to basic and dressy watches. “FRANCK MULLER” has established a greater presence in the market for both males and females consumers. Hence, in addition to the strong demand for standard, basic and dressy watches, there appear to be high needs for a second or third luxury watch.

■Watch brand you want (by sex and age group): Supplementary data

2010

Brand you want	Total	Male	Male 20s	Male 30s	Male 40s	Male 50+	Female	Female 20s	Female 30s	Female 40s	Female 50+
Number of respondents	1500	750	180	172	219	179	750	170	189	209	182
ROLEX	37.9	41.7	45.0	41.9	39.7	40.8	34.1	31.2	41.3	33.5	30.2
OMEGA	32.1	37.7	46.7	40.1	36.5	27.9	26.4	24.7	30.7	24.9	25.3
CARTIER	28.5	12.5	16.7	11.0	12.3	10.1	44.4	47.6	45.5	46.9	37.4
BVLGARI	25.1	18.7	25.0	17.4	18.7	13.4	31.6	35.9	29.6	30.6	30.8
FRANCK MULLER	20.1	18.3	22.8	22.1	17.4	11.2	22.0	27.6	28.6	21.1	11.0
SEIKO	19.5	24.7	21.1	21.5	26.9	28.5	14.3	7.1	13.8	17.2	18.1
HERMES	15.9	5.6	7.8	3.5	5.0	6.1	26.3	28.8	27.0	25.4	24.2
TAG HEUER	15.9	23.2	21.7	23.8	28.8	17.3	8.7	4.7	7.9	14.4	6.6
TIFFANY	12.7	4.1	5.0	3.5	4.1	3.9	21.2	20.0	22.8	23.9	17.6
CHANEL	11.7	4.5	6.1	3.5	4.6	3.9	18.8	24.7	14.8	17.2	19.2
GUCCI	11.5	5.2	12.8	4.1	2.7	1.7	17.9	24.1	16.9	13.9	17.6
CASIO	11.3	14.4	16.1	19.2	14.2	8.4	8.3	8.8	10.6	8.6	4.9
LOUIS VUITTON	11.1	6.0	7.2	8.1	5.0	3.9	16.3	20.0	19.6	13.4	12.6
CITIZEN	10.1	12.4	16.1	8.7	12.8	11.7	7.9	9.4	7.4	6.2	8.8
BREITLING	8.1	13.7	9.4	16.3	18.7	9.5	2.4	1.8	3.7	3.3	0.5
BURBERRY	7.5	6.5	8.3	8.1	5.9	3.9	8.5	11.2	7.4	6.2	9.9
SWATCH	7.5	6.7	5.0	12.2	6.4	3.4	8.3	8.8	7.4	11.0	5.5
COACH	6.8	3.2	6.1	1.7	2.3	2.8	10.4	14.1	11.1	9.1	7.7
IWC	6.5	10.1	11.1	12.2	10.0	7.3	2.8	2.9	4.8	3.3	0.0
CHOPARD	6.1	1.2	1.7	0.6	2.3	0.0	10.9	11.8	10.1	10.5	11.5
agnes.b.	5.9	3.3	6.1	5.2	1.4	1.1	8.5	14.7	10.6	4.3	5.5
HARRY WINSTON	5.7	2.5	2.8	2.3	2.3	2.8	8.9	10.0	7.4	13.4	4.4
PIAGET	5.7	3.7	2.2	2.3	5.0	5.0	7.6	2.4	6.9	10.5	9.9
FOLLI FOLLIE	5.6	1.5	4.4	0.6	0.9	0.0	9.7	19.4	10.6	5.3	4.9
DIOR	5.5	2.1	6.1	0.0	1.8	0.6	8.9	14.1	10.1	5.3	7.1
AUDEMARS PIGUET	5.0	6.9	5.0	6.4	7.8	8.4	3.1	1.8	3.7	2.9	3.8
PATEK PHILIPPE	4.5	6.3	3.9	7.0	7.3	6.7	2.7	1.2	2.6	3.3	3.3

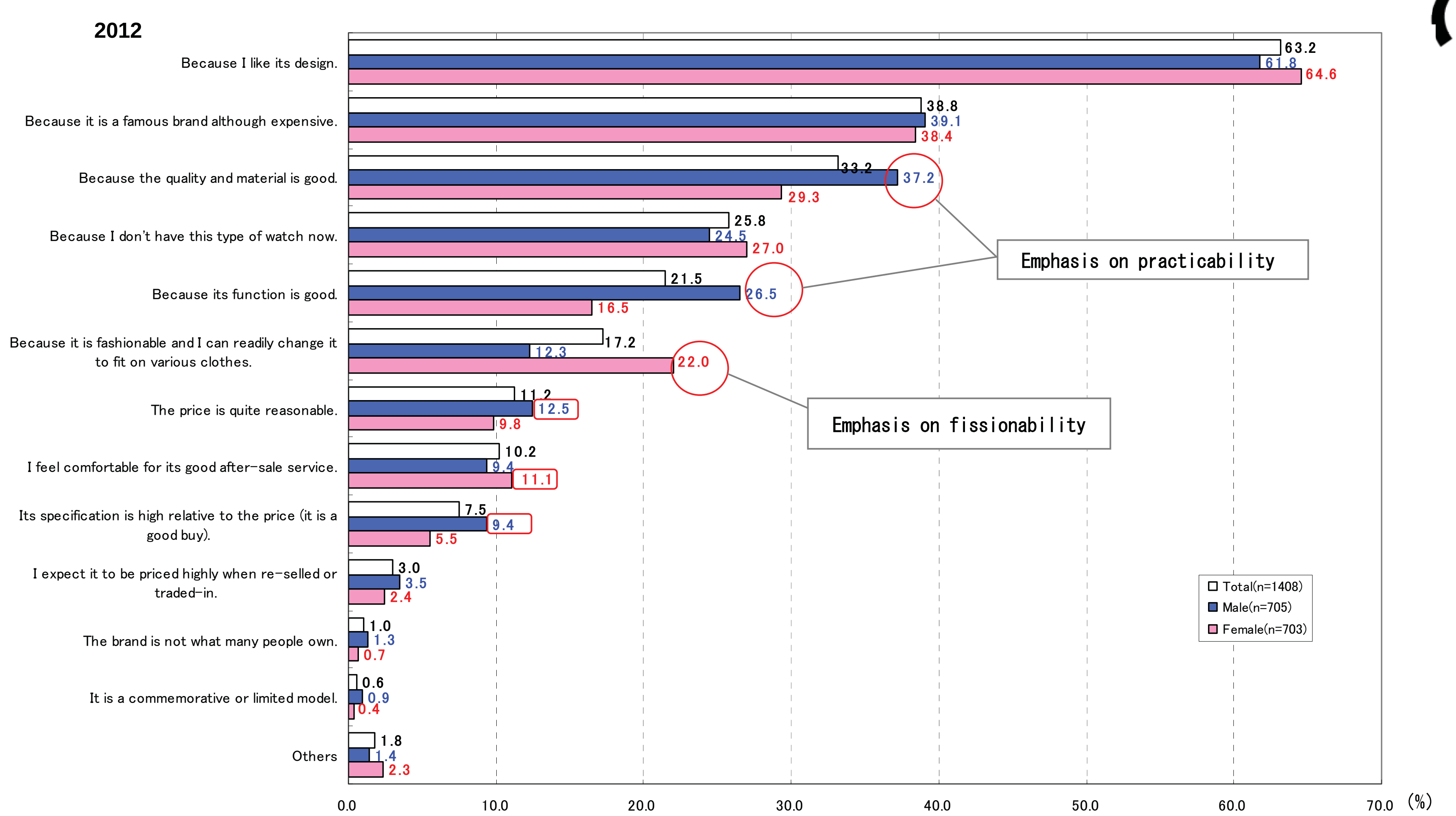
(Numbers are percentages)

2012

Brand you want	Total	Male	Male 20s	Male 30s	Male 40s	Male 50+	Female	Female 20s	Female 30s	Female 40s	Female 50+
Number of respondents	1500	750	144	216	207	183	750	224	196	175	155
ROLEX	35.7	41.5	34.0	41.2	44.9	43.7	29.9	22.8	40.3	31.4	25.2
OMEGA	27.7	35.5	39.6	40.7	36.7	24.6	20.0	15.2	24.5	20.0	21.3
CARTIER	26.2	12.3	11.1	11.1	11.1	15.8	40.1	42.9	49.5	34.9	30.3
FRANCK MULLER	22.5	22.7	27.8	22.7	24.6	16.4	22.3	24.1	27.0	22.3	13.5
BVLGARI	21.3	16.9	26.4	12.5	15.0	16.9	25.6	24.6	28.6	21.1	28.4
SEIKO	16.6	19.9	21.5	18.1	19.3	21.3	13.3	10.7	17.9	11.4	13.5
HERMES	14.9	6.3	9.7	3.2	4.8	8.7	23.5	17.9	27.0	26.3	23.9
TAG HEUER	13.4	21.2	17.4	24.1	25.1	16.4	5.6	2.7	7.7	9.1	3.2
CASIO	12.8	17.6	18.8	19.4	17.9	14.2	8.0	10.7	11.7	5.1	2.6
CHANEL	12.8	4.5	9.0	0.9	5.8	3.8	21.1	23.7	21.9	17.1	20.6
TIFFANY	11.2	2.1	1.4	0.0	2.4	4.9	20.3	25.4	20.4	17.1	16.1
CITIZEN	11.1	12.7	16.7	11.1	14.0	9.8	9.5	13.4	7.7	9.1	6.5
GUCCI	10.1	4.7	10.4	3.7	1.9	4.4	15.5	18.8	15.3	14.3	12.3
LOUIS VUITTON	8.1	4.5	8.3	2.3	4.3	4.4	11.6	11.6	15.3	10.3	8.4
BREITLING	7.0	12.4	6.9	12.5	15.9	12.6	1.6	2.2	0.0	3.4	0.6
BURBERRY	6.1	5.5	10.4	2.8	2.4	8.2	6.8	12.1	5.6	4.6	3.2
COACH	6.0	1.9	2.1	0.9	1.4	3.3	10.1	13.4	12.2	6.3	7.1
IWC	6.0	10.1	6.9	10.2	13.0	9.3	1.9	1.8	3.1	1.7	0.6
agnes b.	5.9	2.5	2.1	4.2	1.9	1.6	9.2	13.8	10.7	4.6	5.8
DIOR	5.5	2.0	4.9	0.9	1.9	1.1	9.1	12.5	7.7	5.7	9.7
SWATCH	5.5	4.5	5.6	5.1	7.2	0.0	6.4	8.0	6.1	6.3	4.5
HARRY WINSTON	5.3	1.6	3.5	0.5	2.4	0.5	8.9	8.5	11.2	9.1	6.5
FOLLI FOLLIE	5.2	0.4	0.7	0.9	0.0	0.0	10.0	14.3	9.2	8.6	6.5
PATEK PHILIPPE	5.1	7.2	2.8	5.1	9.2	10.9	2.9	2.7	2.6	2.9	3.9
HAMILTON	4.8	6.1	9.0	8.3	4.8	2.7	3.5	4.0	3.6	2.9	3.2
Paul Smith	4.8	5.6	14.6	6.9	2.4	0.5	4.0	8.5	2.6	2.9	0.6
AUDEMARS PIGUET	4.7	7.5	6.9	6.0	7.2	9.8	2.0	2.2	0.5	2.3	3.2
DIESEL	4.7	4.8	11.1	5.1	2.4	2.2	4.5	5.8	7.1	2.3	1.9
Marc by Marc Jacobs	4.7	1.1	2.1	1.4	1.0	0.0	8.4	18.3	7.7	2.3	1.9

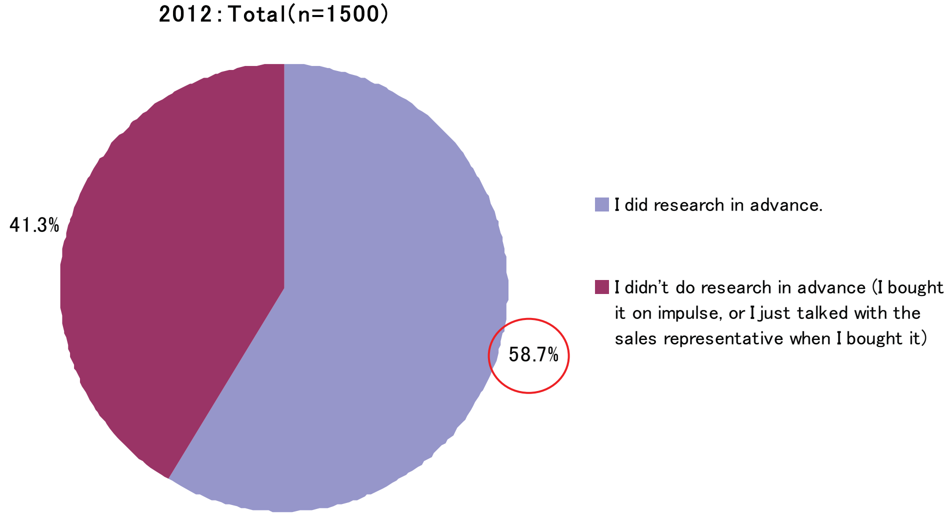
(Numbers are percentages)

■Reason for preferring specific brand



* The top reason for preferring a specific brand was “Good design”, followed by “Expensive but famous brand” and “Good quality and material”.
* While men placed importance on “functions” and “quality and material”, women showed high awareness for a watch as being ‘one of the personal fashion items’.
* In addition, men were highly conscious about “price”, e.g. “reasonable price” and “good value for the money”, while many female respondents were interested in “Good after-sale service”, which reflected their high dependence on a sense of security after purchasing.

■Research before purchasing a watch (all)



■Research before purchasing a watch (male)

2012

	Total male (n=750)	Male 20s (n=144)	Male 30s (n=216)	Male 40s (n=207)	Male 50s+ (n=183)
I did research in advance.	62.1	52.8	67.1	64.3	61.2
I didn't do research in advance (I bought it on impulse, or I just talked with the sales representative when I bought it)	37.9	47.2	32.9	35.7	38.8

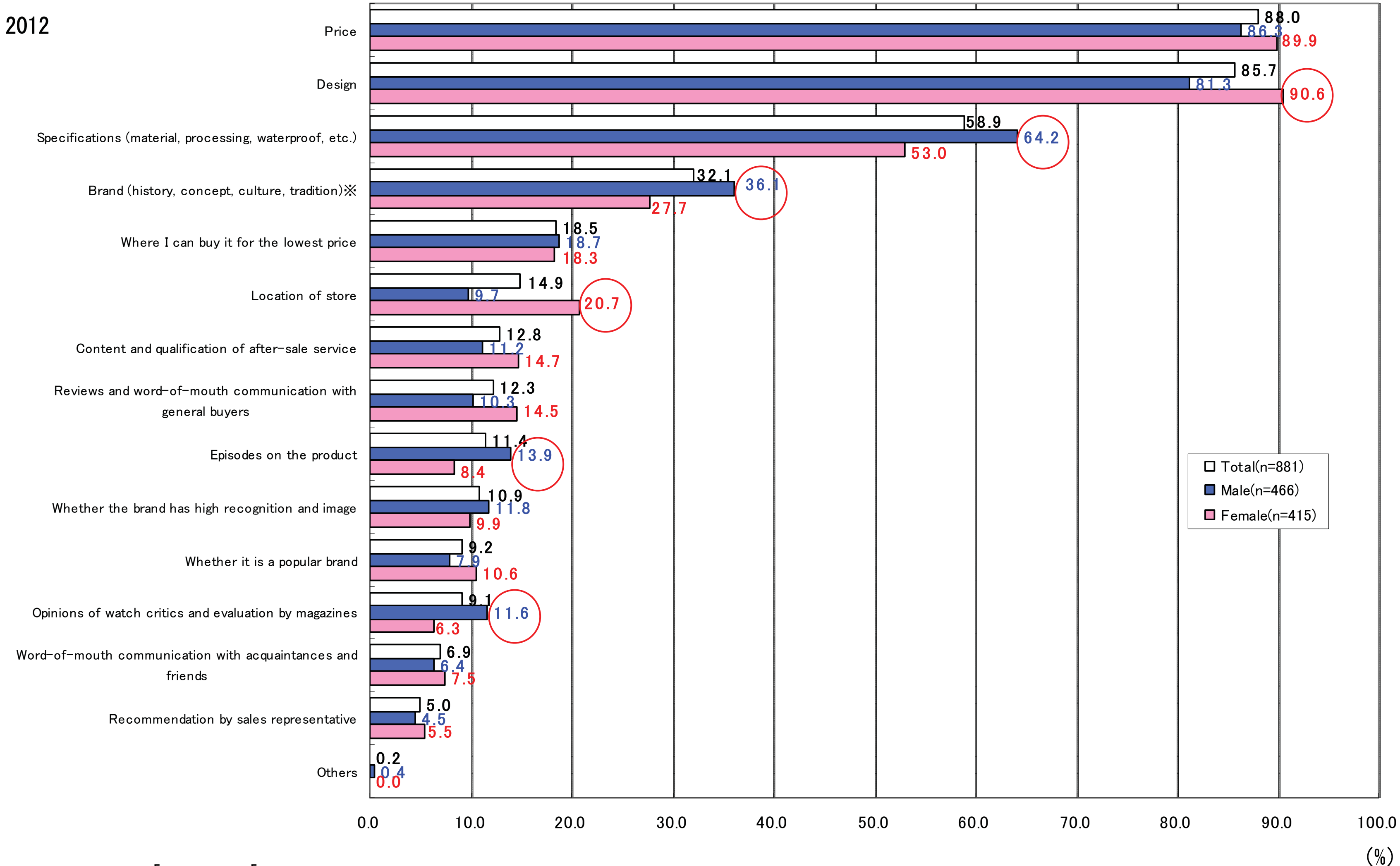
■Research before purchasing a watch (female)

2012

	Total female (n=750)	Female 20s (n=224)	Female 30s (n=196)	Female 40s (n=175)	Female 50s+ (n=155)
I did research in advance.	55.3	49.6	64.3	57.1	50.3
I didn't do research in advance (I bought it on impulse, or I just talked with the sales representative when I bought it)	44.7	50.4	35.7	42.9	49.7

* Approximately 60% of all respondents “did research in advance” before buying a watch.
* In comparing male and female responses, there was a stronger tendency among males to conduct advance research, especially among those in their 30s and 40s.

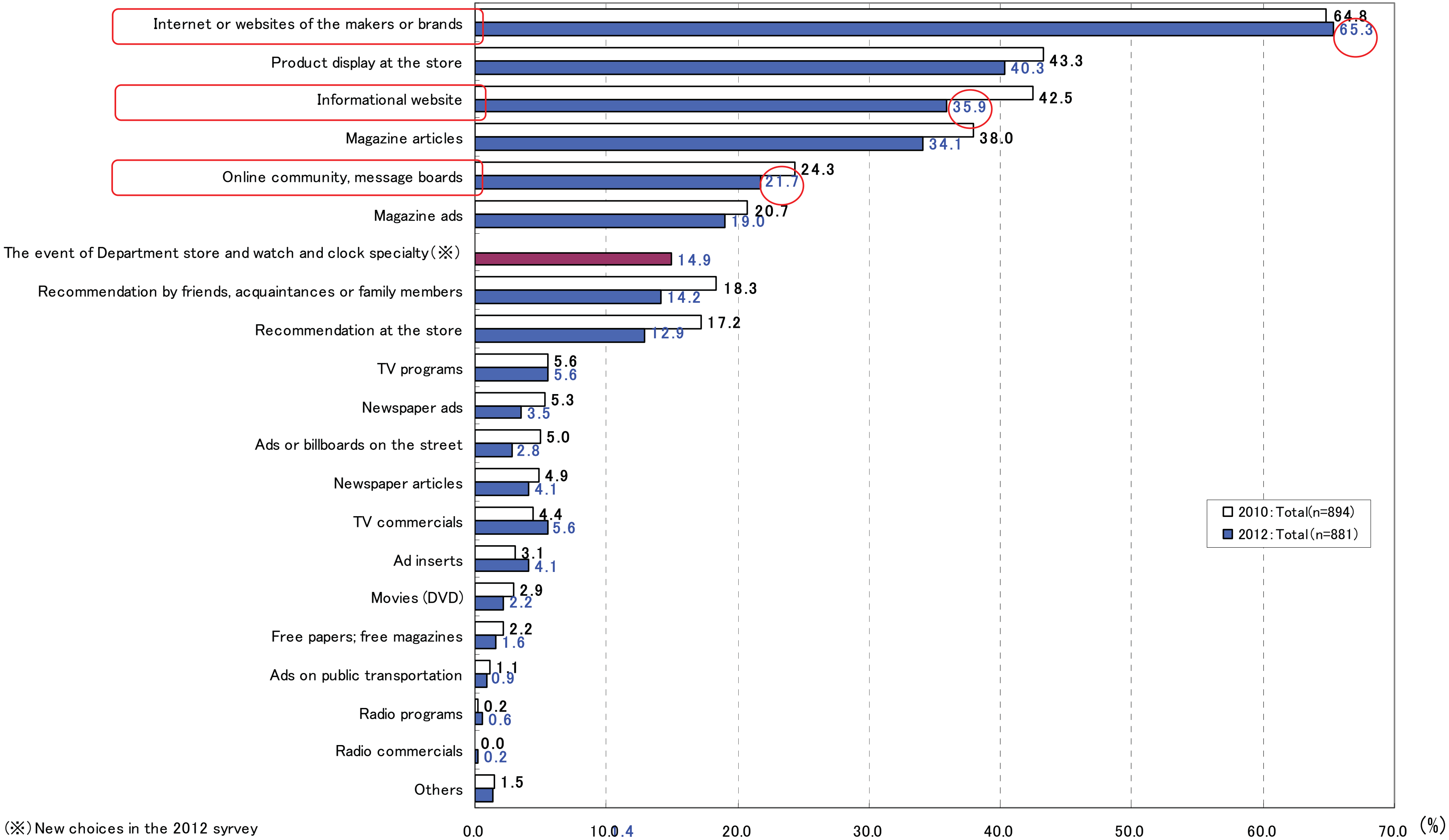
■Kind of research done in advance



(※) In the 2012 survey,「culture」and「tradition」were added as new choices

* Ranked high also in the 2012 survey were “Price”, “Design” and “Specifications (material, processing, waterproof, etc.)”
* Male respondents showed “attachment to the product itself” such as “Specifications”, “Brand (history, concept, culture, tradition)”, “Episodes on the product” and “Opinions of watch critics and evaluation by magazines” as well as needs for added value such as “Background of the brand”.
* Meanwhile, females indicated a strong tendency to seek “value in fashionability” such as “Design” and “Location of store” as well as “reliability and security” in purchasing a product.

■Media which are influential in decision-making of buying a watch (all)



(※) New choices in the 2012 syrvey

* "Internet or websites of the makers of brands" was the most utilized media influential in deciding whether or not to buy a watch.
* Other Internet-related sources such as "Information website" and "Online community, message boards" were also ranked high, which reflects the growing tendency among consumers to gather information on the Internet to make purchasing decisions.
* Meanwhile, there was also a high dependence on "Product display at the store" and "Magazine articles", which is an indication that distributors are expected to take advertising and promotional strategies based on a set of well-balanced tangible and intangible elements.

■Media which are influential in decision-making of buying a watch (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2010(n=485)	2012(n=466)	2010(n=106)	2012(n=76)	2010(n=118)	2012(n=145)	2010(n=150)	2012(n=133)	2010(n=111)	2012(n=112)
Internet or websites of the makers or brands	69.7	68.9	62.3	60.5	68.6	72.4	69.3	68.4	78.4	70.5
Product display at the store	35.1	34.8	41.5	26.3	33.1	37.9	28.7	29.3	39.6	42.9
Informational website	48.0	41.6	50.9	38.2	46.6	44.1	48.7	41.4	45.9	41.1
Magazine articles	37.3	34.1	38.7	32.9	33.9	39.3	40.0	31.6	36.0	31.3
Online community, message boards	27.2	26.4	36.8	30.3	25.4	32.4	28.7	20.3	18.0	23.2
Magazine ads	16.7	16.1	16.0	9.2	6.8	14.5	18.7	19.5	25.2	18.8
The event of Department store and watch and clock specialty(※)		11.8		11.8		9.0		9.0		18.8
Recommendation by friends, acquaintances or family members	11.8	10.3	14.2	19.7	10.2	11.7	13.3	8.3	9.0	4.5
Recommendation at the store	12.8	9.4	19.8	7.9	9.3	9.0	12.7	10.5	9.9	9.8
TV programs	4.7	4.7	7.5	3.9	0.8	5.5	4.0	5.3	7.2	3.6
Newspaper ads	5.6	3.6	4.7	1.3	1.7	1.4	5.3	3.0	10.8	5.4
Ads or billboards on the street	4.1	2.6	7.5	2.6	1.7	2.8	4.0	1.5	3.6	3.6
Newspaper articles	4.5	4.7	6.6	5.3	2.5	4.1	3.3	4.5	6.3	5.4
TV commercials	4.3	4.1	5.7	3.9	0.8	4.1	5.3	3.8	5.4	4.5
Ad inserts	2.7	4.3	2.8	3.9	0.8	4.1	3.3	6.0	3.6	2.7
Movies (DVD)	3.5	2.1	8.5	5.3	1.7	1.4	2.0	2.3	2.7	0.9
Free papers; free magazines	1.4	1.3	2.8	2.6	0.0	2.1	2.0	0.8	0.9	0.0
Ads on public transportation	0.6	0.9	1.9	0.0	0.0	1.4	0.0	0.8	0.9	0.9
Radio programs	0.0	0.6	0.0	2.6	0.0	0.7	0.0	0.0	0.0	0.0
Radio commercials	0.0	0.2	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0
Others	2.1	1.5	0.9	3.9	0.0	0.0	3.3	2.3	3.6	0.9

(※)New choices in the 2012 syrvey

■Media which are influential in purchasing a watch (female)

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2010(n=409)	2012(n=415)	2010(n=89)	2012(n=111)	2010(n=117)	2012(n=126)	2010(n=124)	2012(n=100)	2010(n=79)	2012(n=78)
Internet or websites of the makers or brands	58.9	61.2	64.0	63.1	59.0	60.3	56.5	55.0	57.0	67.9
Product display at the store	53.1	46.5	51.7	45.9	53.0	46.0	52.4	50.0	55.7	43.6
Informational website	35.9	29.4	39.3	27.9	39.3	30.2	31.5	29.0	34.2	30.8
Magazine articles	38.9	34.0	37.1	34.2	46.2	44.4	39.5	27.0	29.1	25.6
Online community, message boards	20.8	16.4	29.2	20.7	22.2	13.5	15.3	18.0	17.7	12.8
Magazine ads	25.4	22.2	21.3	24.3	24.8	22.2	28.2	17.0	26.6	25.6
The event of Department store and watch and clock specialty(※)		18.3		13.5		21.4		18.0		20.5
Recommendation by friends, acquaintances or family members	26.2	18.6	25.8	19.8	23.1	23.0	29.8	15.0	25.3	14.1
Recommendation at the store	22.5	16.9	28.1	21.6	23.1	15.9	18.5	19.0	21.5	9.0
TV programs	6.6	6.5	3.4	11.7	7.7	5.6	8.1	3.0	6.3	5.1
Newspaper ads	4.9	3.4	2.2	0.9	5.1	0.8	4.0	5.0	8.9	9.0
Ads or billboards on the street	6.1	3.1	9.0	2.7	8.5	5.6	3.2	1.0	3.8	2.6
Newspaper articles	5.4	3.4	6.7	0.0	3.4	4.0	3.2	6.0	10.1	3.8
TV commercials	4.4	7.2	5.6	5.4	3.4	7.1	4.0	5.0	5.1	12.8
Ad inserts	3.7	3.9	2.2	2.7	2.6	0.8	4.0	6.0	6.3	7.7
Movies (DVD)	2.2	2.2	1.1	2.7	1.7	1.6	4.0	4.0	1.3	0.0
Free papers; free magazines	3.2	1.9	7.9	0.9	1.7	1.6	3.2	2.0	0.0	3.8
Ads on public transportation	1.7	1.0	3.4	1.8	0.0	1.6	2.4	0.0	1.3	0.0
Radio programs	0.5	0.5	1.1	1.8	0.0	0.0	0.8	0.0	0.0	0.0
Radio commercials	0.0	0.2	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0
Others	0.7	1.2	0.0	0.9	0.0	0.8	0.0	2.0	3.8	1.3

(※)New choices in the 2012 syrvey

* There was a tendency among males to “put importance on information from the Internet” as recognized in the previous survey. Meanwhile, females preferred the combined use of “the Internet and storefront”.

■Magazine subscription ranking (by sex)

	2010(Male)				2012(Male)		
Order	Name of magazine subscribed to	Male(n=750)		Order	Name of magazine subscribed to	Male(n=750)	
1	Otona no Shuumatsu	11.5	↘ To 3rd place	1	Sekai no Udedokei	6.7	
2	Sekai no Udedokei	8.9	↗ To 1st place	2	Otoko no Kakurega	5.6	
3	Otoko no Kakurega	8.5	↗ To 2nd place	3	Otona no Shuumatsu	5.5	
4	serai	8.4	→	4	serai	4.8	
5	monomagazine	7.1	→	5	monomagazine	4.7	
6	Nikkei Otona no OFF	6.9	↘ To 13th place	6	LEON	4.1	
7	MEN'S NON-NO	6.9	↘ To 12th place	7	Gainer	4.0	
8	BRUTUS	6.7	↘ To 10th place	8	GetNavi	3.9	
9	LEON	5.9	↗ To 6th place	9	GoodPress	3.6	
10	Tarzan	5.9	↘ To 11th place	10	BRUTUS	3.5	
11	MEN'S CLUB	5.7	↘ To 17th place	11	Tarzan	3.5	
12	GoodPress	5.6	↗ To 9th place	12	MEN'S NON-NO	3.3	
13	Tokei begin	5.2	↘ To 14th place	13	Nikkei Otona no OFF	3.1	
14	Begin	4.9	↘ To 19th place	14	Tokei begin	2.8	
15	Sanpo no Tatsujin	4.7	– Ranked out	15	pen	2.5	Ranked in
16	GetNavi	4.7	↗ To 8th place	16	smart	2.5	
17	smart	3.5	↗ To 16th place	17	MEN'S CLUB	2.4	
18	Jiyuujin	3.3	– Ranked out	18	MEN'S EX	2.4	Ranked in
19	Gainer	3.3	↗ To 7th place	19	Begin	2.0	
20	Ikkojin	2.7	→	20	Ikkojin	1.9	

	2010(Female)				2012(Female)		
Order	Name of magazine subscribed to	Female(n=750)		Order	Name of magazine subscribed to	Female(n=750)	
1	MORE	12.8	→	1	MORE	9.3	
2	With	10.9	↘ To 6th place	2	STORY	8.7	
3	STORY	10.4	↗ To 2nd place	3	VERY	8.5	
4	Oggi	10.3	↘ To 9th place	4	Biteki	8.4	
5	Nikkei Woman	9.5	↘ To 7th place	5	CLASSY.	7.9	
6	CLASSY.	9.5	↗ To 5th place	6	With	7.6	
7	VERY	8.8	↗ To 3rd place	7	Nikkei Woman	7.1	
8	Katei Gaho	7.1	↘ To 14th place	8	an an	6.4	
9	an an	6.8	↗ To 8th place	9	Oggi	5.6	
10	Fujin Gaho	6.8	↘ To 17th place	10	ViVi	5.2	
11	AneCan	6.4	↘ To 18th place	11	LEE	4.8	
12	ViVi	6.3	↗ To 10th place	12	Voce	4.0	
13	LEE	6.0	↗ To 11th place	13	CanCan	3.9	
14	Biteki	5.6	↗ To 4th place	14	Katei Gaho	3.7	
15	CanCan	5.2	↗ To 13th place	15	JJ	3.3	
16	JJ	5.2	↗ To 15th place	16	MAQUIA	3.2	
17	MAQUIA	4.8	↗ To 16th place	17	Fujin Gaho	3.1	
18	Voce	4.3	↗ To 12th place	18	AneCan	3.1	
19	Domani	4.1	↘ To 21st place	19	FRaU	2.8	Ranked in
20	serai	4.0	– Ranked out	20	Mrs.	2.7	Ranked in
21	Fujin Koron	3.9	– Ranked out	21	Domani	2.5	

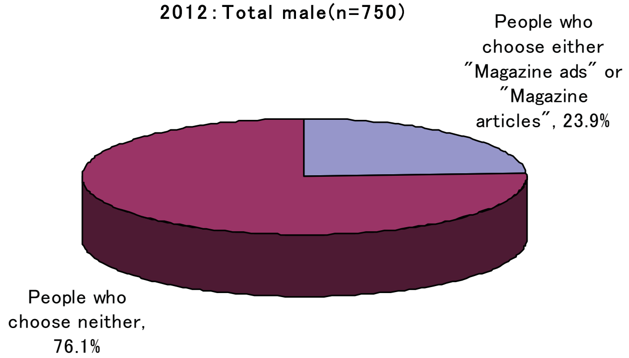
* In 2012, popular choices for male samples were “Fashion/lifestyle magazines”, “Watch specialty magazines” and “Gadget magazines” as in the previous survey. In particular, “Gadget magazines” such as “GoodPress” and “GetNavi” rose significantly in the rankings.
* “Fashion/lifestyle magazines” was the dominant response among females as in the previous survey.

■Magazine which motivates to buy a watch*

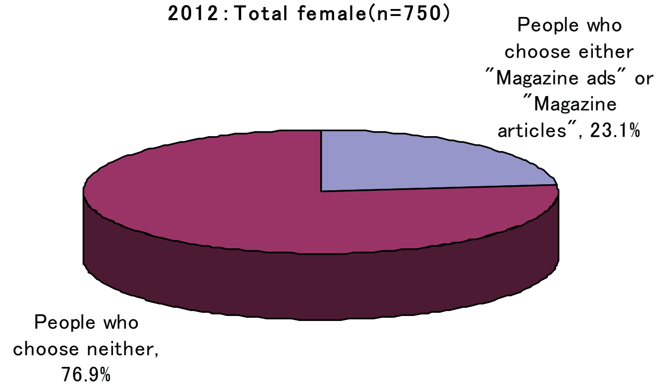
*“Magazine that motivates to buy a watch” is defined as those that are subscribed by people who satisfy the following conditions:

People who selected either “Magazine ads” or “Magazine articles” to the question “What source of information do you put importance on when purchasing a watch?"

■Proportion of those who chose either "Magazine ads" or "Magazine articles" (male)



■Proportion of those who chose either "Magazine ads" or "Magazine articles" (female)



■2012 magazine subscription ranking vs. magazine ranking which motivates to buy a watch (male)

Order	Name of magazine subscribed to	Male(n=750)			Order	Magazine that motivates to buy a watch	Male(n=179)
1	Sekai no Udedokei	6.7	→		1	Sekai no Udedokei	17.9
2	Otoko no Kakurega	5.6	→		2	Otoko no Kakurega	12.3
3	Otona no Shuumatsu	5.5	↘	To 12th place	3	Gainer	10.6
4	serai	4.8	↘	To 13th place	4	monomagazine	10.1
5	monomagazine	4.7	↗	To 4th place	5	Tokei begin	10.1
6	LEON	4.1	↘	To 7th place	6	GoodPress	8.9
7	Gainer	4.0	↗	To 3rd place	7	LEON	8.4
8	GetNavi	3.9	↘	To 9th place	8	BRUTUS	7.3
9	GoodPress	3.6	↗	To 6th place	9	GetNavi	7.3
10	BRUTUS	3.5	↗	To 8th place	10	Tarzan	7.3
11	Tarzan	3.5	↗	To 10th place	11	pen	6.7
12	MEN'S NON-NO	3.3	↘	To 15th place	12	Otona no Shuumatsu	6.1
13	Nikkei Otona no OFF	3.1	↘	To 18th place	13	serai	6.1
14	Tokei begin	2.8	↗	To 5th place	14	Begin	6.1
15	pen	2.5	↗	To 11th place	15	MEN'S NON-NO	6.1
16	smart	2.5	↘	To 19th place	16	MEN'S CLUB	5.6
17	MEN'S CLUB	2.4	↗	To 16th place	17	MEN'S EX	5.6
18	MEN'S EX	2.4	↗	To 17th place	18	Nikkei Otona no OFF	4.5
19	Begin	2.0	↗	To 14th place	19	smart	3.9
20	Ikkojin	1.9	→		20	Ikkojin	3.4

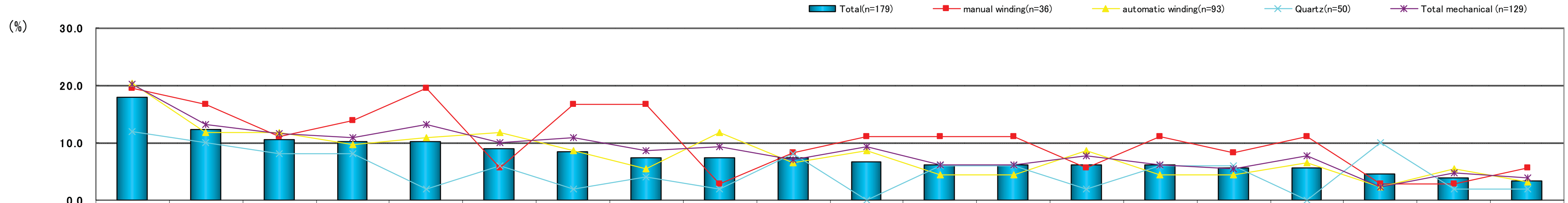
■2012 magazine subscription ranking vs. magazine ranking which motivates to buy a watch (female)

Order	Name of magazine subscribed to	Female(n=750)			Order	Magazine that motivates to buy a watch	Female(n=173)	
1	MORE	9.3	→		1	MORE	15.6	
2	STORY	8.7	→		2	STORY	13.9	
3	VERY	8.5	↘	To 5th place	3	Oggi	13.3	
4	Biteki	8.4	→		4	Biteki	12.1	
5	CLASSY.	7.9	↘	To 6th place	5	VERY	12.1	
6	With	7.6	↘	To 7th place	6	CLASSY.	11.6	
7	Nikkei Woman	7.1	↘	To 9th place	7	With	11.0	
8	an an	6.4	→		8	an an	11.0	
9	Oggi	5.6	↗	To 3rd place	9	Nikkei Woman	11.0	
10	ViVi	5.2	↘	To 14th place	10	MAQUIA	8.1	
11	LEE	4.8	↘	To 13th place	11	CanCan	7.5	
12	Voce	4.0	↘	To 18th place	12	Domani	7.5	
13	CanCan	3.9	↗	To 11th place	13	LEE	7.5	
14	Katei Gaho	3.7	↘	To 16th place	14	ViVi	7.5	
15	JJ	3.3	→		15	JJ	6.9	
16	MAQUIA	3.2	↗	To 10th place	16	Katei Gaho	6.4	
17	Fujin Gaho	3.1	↘	To 19th place	17	FRaU	6.4	
18	AneCan	3.1	↘	To 20th place	18	Voce	5.8	
19	FRaU	2.8	↗	To 17th place	19	Fujin Gaho	5.2	
20	Mrs.	2.7	－	Ranked out	20	AneCan	4.6	
21	Domani	2.5	↗	To 12th place	21	Fujin Koron	3.5	Ranked in

* Popular among male samples in 2012, as in the previous survey, were “Watch specialty magazines” and “Gadget magazines” that offer much product information. “Gadget magazines”, in particular, rose significantly in the rankings.
* Females primarily preferred “Fashion/lifestyle magazines” for young and middle-aged.

■Magazine which motivates to buy a watch: by favorite function (male) **Reference material**

2012

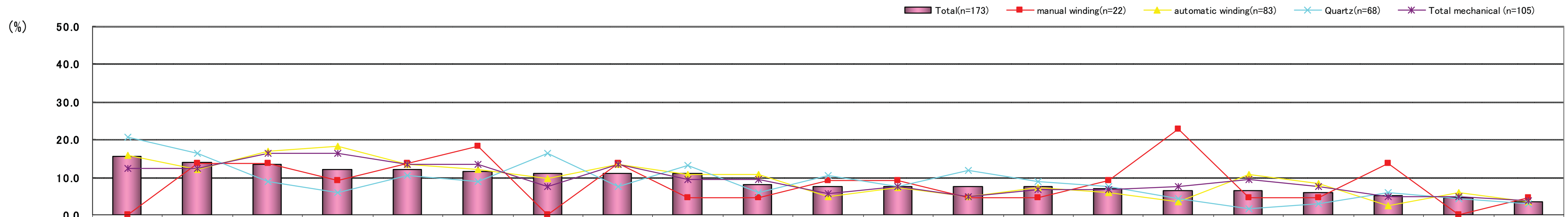


	Sekai no Udedokei	Otoko no Kakurega	Gainer	monomagazine	Tokei begin	GoodPress	LEON	BRUTUS	GetNavi	Tarzan
Total(n=179)	17.9	12.3	10.6	10.1	10.1	8.9	8.4	7.3	7.3	7.3
manual winding(n=36)	19.4	16.7	11.1	13.9	19.4	5.6	16.7	16.7	2.8	8.3
automatic winding(n=93)	20.4	11.8	11.8	9.7	10.8	11.8	8.6	5.4	11.8	6.5
Quartz(n=50)	12.0	10.0	8.0	8.0	2.0	6.0	2.0	4.0	2.0	8.0
Total mechanical (n=129)	20.1	13.2	11.6	10.9	13.2	10.1	10.9	8.6	9.3	7.0

	pen	Otona no Shuumatsu	serai	Begin	MEN'S NON-NO	MEN'S CLUB	MEN'S EX	Nikkei Otona no OFF	smart	Ikkojin
Total(n=179)	6.7	6.1	6.1	6.1	6.1	5.6	5.6	4.5	3.9	3.4
manual winding(n=36)	11.1	11.1	11.1	5.6	11.1	8.3	11.1	2.8	2.8	5.6
automatic winding(n=93)	8.6	4.3	4.3	8.6	4.3	4.3	6.5	2.2	5.4	3.2
Quartz(n=50)	0.0	6.0	6.0	2.0	6.0	6.0	0.0	10.0	2.0	2.0
Total mechanical (n=129)	9.3	6.2	6.2	7.8	6.2	5.4	7.8	2.4	4.7	3.9

■Magazine which motivates to buy a watch: by favorite function (female) **Reference material**

2012



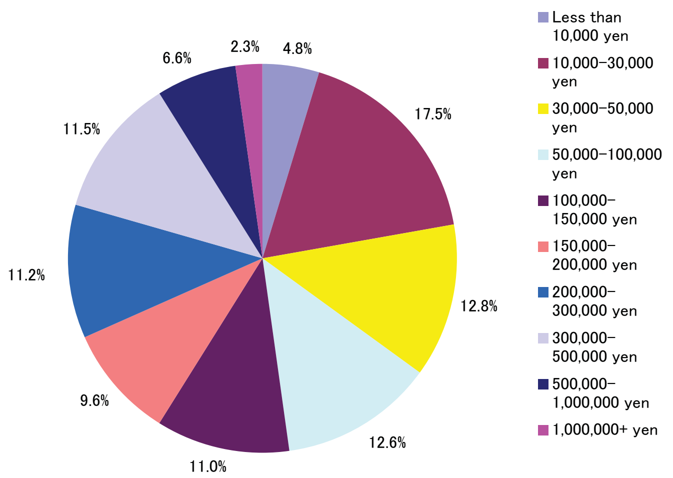
	MORE	STORY	Oggi	Biteki	VERY	CLASSY.	With	an an	Nikkei Woman	MAQUIA	CanCan
Total(n=173)	15.6	13.9	13.3	12.1	12.1	11.6	11.0	11.0	11.0	8.1	7.5
manual winding(n=22)	0.0	13.6	13.6	9.1	13.6	18.2	0.0	13.6	4.5	4.5	9.1
automatic winding(n=83)	15.7	12.0	16.9	18.1	13.3	12.0	9.6	13.3	10.8	10.8	4.8
Quartz(n=68)	20.6	16.2	8.8	5.9	10.3	8.8	16.2	7.4	13.2	5.9	10.3
Total mechanical (n=105)	12.4	12.3	16.2	16.2	13.4	13.3	7.6	13.4	9.5	9.5	5.7

	Domani	LEE	ViVi	JJ	Katei Gaho	FRaU	Voce	Fujin Gaho	AneCan	Fujin Koron
Total(n=173)	7.5	7.5	7.5	6.9	6.4	6.4	5.8	5.2	4.6	3.5
manual winding(n=22)	9.1	4.5	4.5	9.1	22.7	4.5	4.5	13.6	0.0	4.5
automatic winding(n=83)	7.2	4.8	7.2	6.0	3.6	10.8	8.4	2.4	6.0	3.6
Quartz(n=68)	7.4	11.8	8.8	7.4	4.4	1.5	2.9	5.9	4.4	2.9
Total mechanical (n=105)	7.6	4.7	6.6	6.6	7.6	9.5	7.6	4.7	4.7	3.8

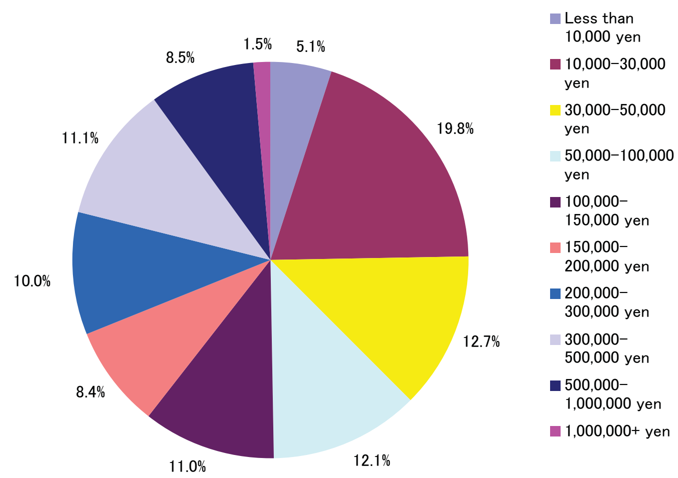
■Purchase price of watch owned by region

*The list is created based on the “purchase price of the most favorite watch” out of all watches owned.

Purchase price of watch owned in 2010: Nationwide（n＝1370）



Purchase price of watch owned in 2012: Nationwide（n＝1324）



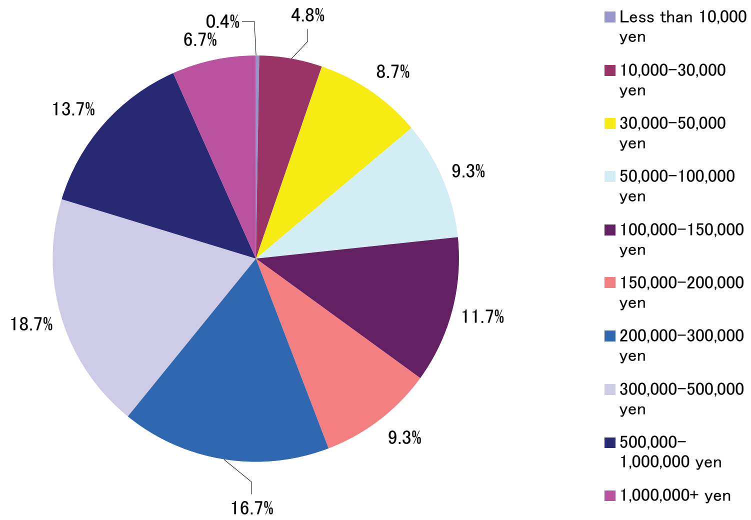
	Hokkaido and Tohoku		Kanto and Koshinetsu		Chubu and Hokuriku		Kansai		Chugoku, Shikoku and Kyushu	
	2010（n＝126）	2012（n＝134）	2010（n＝637）	2012（n＝615）	2010（n＝167）	2012（n＝175）	2010（n＝274）	2012（n＝234）	2010（n＝166）	2012（n＝166）
Less than 10,000 yen	9.5	9.7	4.4	4.2	4.8	3.4	3.3	2.6	5.4	9.6
10,000–30,000 yen	15.1	30.6	17.7	18.9	19.2	22.3	17.2	14.5	17.5	19.3
30,000–50,000 yen	13.5	17.2	11.1	11.4	15.6	15.4	13.9	10.3	13.9	14.5
50,000–100,000 yen	17.5	9.7	14.6	12.4	9.0	13.1	9.1	12.4	10.8	11.4
100,000–150,000 yen	15.9	7.5	12.1	11.7	4.8	10.3	9.9	13.7	11.4	7.8
150,000–200,000 yen	8.7	6.7	8.9	9.4	9.0	7.4	10.2	9.0	12.0	6.0
200,000–300,000 yen	8.7	5.2	11.6	11.7	9.6	9.1	12.8	9.0	10.8	9.6
300,000–500,000 yen	6.3	8.2	11.0	10.9	16.2	12.0	13.1	14.1	10.2	9.0
500,000–1,000,000 yen	4.0	5.2	6.8	8.5	7.8	5.1	6.9	11.1	6.0	10.8
1,000,000+ yen	0.8	0.0	1.7	1.0	4.2	1.7	3.6	3.4	1.8	1.8

* Many survey samples in “Hokkaido & Tohoku” responded “10,000 – 50,000 yen”, as the inclination for lower-priced products continued.
* In “Kanto & Koshinetsu”, “Chubu & Hokuriku”, “Kansai” and “Chugoku, Shikoku & Kyushu”, there was a polarization between the low price range and the mid-to-high price range.
* In “Kansai” and “Chugoku, Shikoku & Kyushu”, there were somewhat more users that own a luxury watch of 500,000 yen or above.

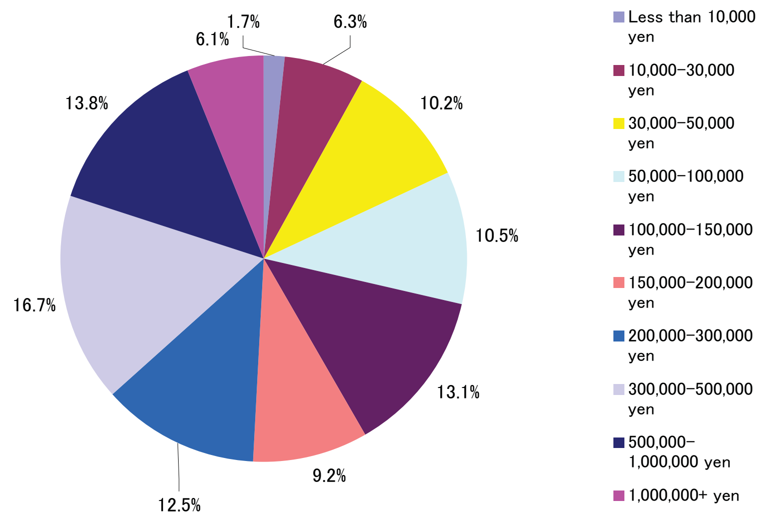
■Price range of watch you want to buy by region

*The list is created based on the “purchase price of the watch you want the most” out of all watches.

2010 Price range of watch you want to buy : Nationwide（n＝1040）



2012 Price range of watch you want to buy : Nationwide（n＝1305）

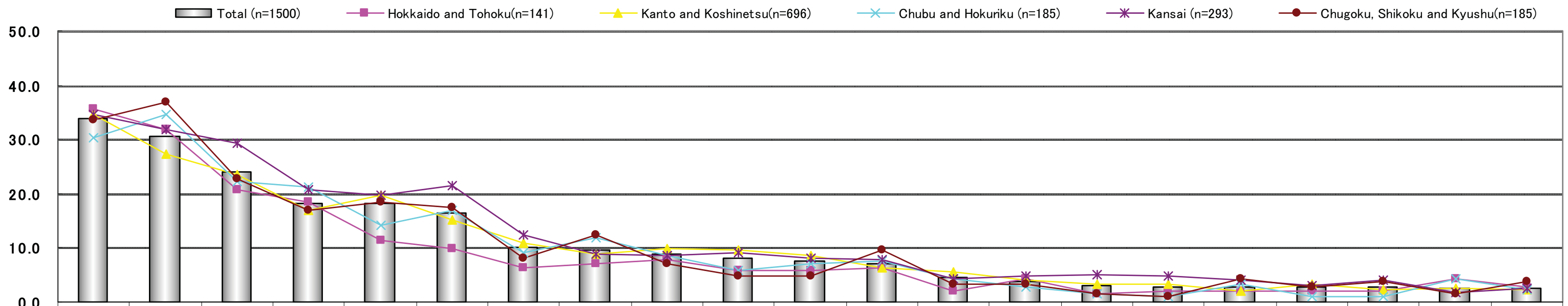


	Hokkaido and Tohoku		Kanto and Koshinetsu		Chubu and Hokuriku		Kansai		Chugoku, Shikoku and Kyushu	
	2010（n＝100）	2012（n＝133）	2010（n＝489）	2012（n＝599）	2010（n＝122）	2012（n＝172）	2010（n＝198）	2012（n＝230）	2010（n＝131）	2012（n＝171）
Less than 10,000 yen	1.0	2.3	0.6	2.0	0.0	1.2	0.0	1.3	0.0	1.2
10,000–30,000 yen	10.0	12.0	3.9	5.0	7.4	7.6	3.5	3.0	3.8	9.4
30,000–50,000 yen	7.0	9.8	9.0	11.7	5.7	10.5	7.6	6.1	13.0	10.5
50,000–100,000 yen	11.0	9.0	11.2	9.2	4.9	14.5	7.1	11.3	8.4	11.1
100,000–150,000 yen	18.0	15.0	10.4	14.5	9.0	11.0	13.6	13.9	11.5	7.6
150,000–200,000 yen	6.0	9.8	11.5	8.5	7.4	9.9	7.6	10.0	8.4	9.4
200,000–300,000 yen	17.0	6.8	17.0	13.5	13.1	10.5	15.2	14.8	21.4	12.3
300,000–500,000 yen	16.0	14.3	16.2	16.4	27.9	17.4	23.2	17.8	14.5	17.5
500,000–1,000,000 yen	7.0	17.3	13.7	12.5	16.4	12.8	14.6	14.3	14.5	15.8
1,000,000+ yen	7.0	3.8	6.5	6.7	8.2	4.7	7.6	7.4	4.6	5.3

* The price range of “10,000 – 150,000 yen” expanded on a nationwide basis. The results show a stronger tendency for lowering prices.
* On the other hand, the ratios of respondents who “want to purchase a watch costing 300,000 yen or above” were, in descending order: 39.5% in “Kansai”, 38.6% in “Chugoku, Shikoku & Kyushu”, 35.6% in “Kanto & Koshinetsu”, 35.4% in “Hokkaido & Tohoku”, and 34.9% in “Chubu & Hokuriku”. This reflects the continuing trend of “high price in the west and low price in the east” for watches that consumers want to buy.

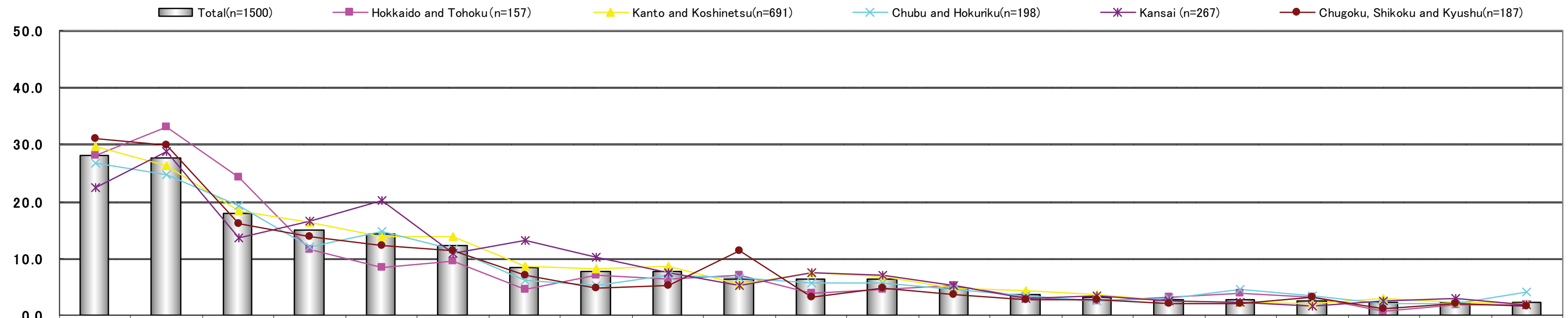
■Brand of watch owned by region

2010



	SEIKO	CASIO	CITIZEN	SWATCH	OMEGA	ROLEX	GUCCI	TAG HEUER	CARTIER	BVLGARI	HERMES	agnes.b.	FOLLI FOLLIE	LONGINES	DIOR	ck CALVIN KLEIN	COACH	TIFFANY	BURBERRY	RADO	DUNHILL
Total (n=1500)	33.9	30.6	24.1	18.3	18.1	16.4	10.1	9.5	8.9	8.1	7.6	7.1	4.6	3.9	3.1	2.9	2.9	2.8	2.7	2.6	2.5
Hokkaido and Tohoku(n=141)	35.5	31.9	20.6	18.4	11.3	9.9	6.4	7.1	7.8	5.7	5.7	6.4	2.1	4.3	1.4	2.1	2.1	2.1	2.1	4.3	2.8
Kanto and Koshinetsu(n=696)	34.5	27.2	23.4	17.0	19.8	15.2	10.8	8.8	9.9	9.6	8.6	6.2	5.6	4.0	3.4	3.2	2.0	3.3	2.3	2.4	2.2
Chubu and Hokuriku (n=185)	30.3	34.6	22.2	21.1	14.1	16.8	9.2	11.9	8.6	5.9	7.0	7.6	4.3	2.7	1.6	1.1	3.2	1.1	1.1	4.3	2.2
Kansai (n=293)	34.5	31.7	29.4	20.8	19.8	21.5	12.3	8.9	8.5	9.2	8.2	7.8	4.4	4.8	5.1	4.8	4.1	3.1	4.1	1.7	2.4
Chugoku, Shikoku and Kyushu(n=185)	33.5	36.8	22.7	16.8	18.4	17.3	8.1	12.4	7.0	4.9	4.9	9.7	3.2	3.2	1.6	1.1	4.3	2.7	3.8	1.6	3.8

2012

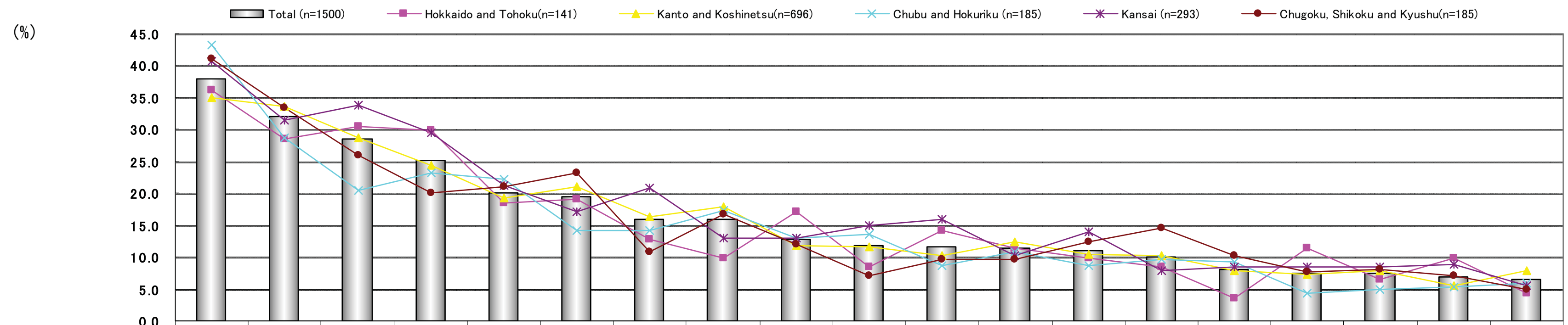


	CASIO	SEIKO	CITIZEN	OMEGA	ROLEX	SWATCH	CARTIER	GUCCI	TAG HEUER	agnes.b.	BVLGARI	HERMES	LONGINES	FOLLI FOLLIE	CHANEL	DIESEL	Paul Smith	その他ｽﾎﾟｰﾂｳｫｯﾁ	BURBERRY	HAMILTON	RADO
Total(n=1500)	28.0	27.7	17.9	15.0	14.3	12.2	8.4	7.6	7.6	6.4	6.3	6.3	4.7	3.6	3.2	2.7	2.7	2.4	2.3	2.3	2.2
Hokkaido and Tohoku(n=157)	28.0	33.1	24.2	11.5	8.3	9.6	4.5	7.0	6.4	7.0	3.8	4.5	5.1	3.2	2.5	3.2	3.8	3.2	0.6	1.9	1.9
Kanto and Koshinetsu(n=691)	29.7	26.3	18.4	16.4	13.9	13.7	8.5	8.2	8.7	5.4	7.4	6.9	4.8	4.2	3.6	2.6	2.2	2.0	3.0	2.2	2.0
Chubu and Hokuriku(n=198)	26.8	24.7	19.2	12.1	14.6	11.6	6.1	5.1	7.1	6.6	5.6	5.6	4.5	3.5	2.5	3.0	4.5	3.5	2.0	2.0	4.0
Kansai (n=267)	22.5	28.8	13.5	16.5	20.2	10.9	13.1	10.1	7.5	5.2	7.5	7.1	5.2	3.0	3.4	2.6	2.2	1.5	2.6	3.0	1.9
Chugoku, Shikoku and Kyushu(n=187)	31.0	29.9	16.0	13.9	12.3	11.2	7.0	4.8	5.3	11.2	3.2	4.8	3.7	2.7	2.7	2.1	2.1	3.2	1.1	2.1	1.6

* There were many owners of well-known luxury watches and high-end fashion watches such as “ROLEX”, “CARTIER” and “GUCCI” in “Kansai”.
* Meanwhile, many owners of domestic brand watches such as “SEIKO” and “CITIZEN” were apparent in “Hokkaido & Tohoku”.

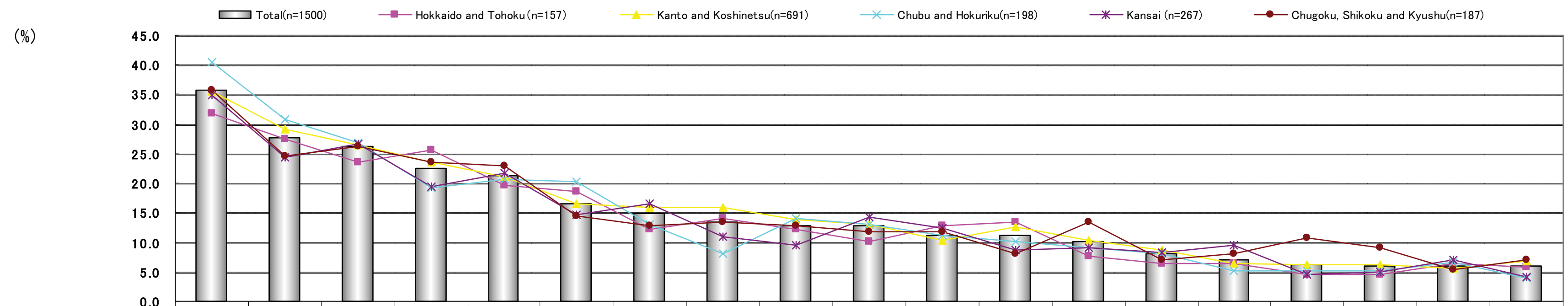
■Brand of watch you want by region

2010



	ROLEX	OMEGA	CARTIER	BVLGARI	FRANCK MULLER	SEIKO	HERMES	TAG HEUER	TIFFANY	CHANEL	GUCCI	CASIO	LOUIS VUITTON	CITIZEN	BREITLING	BURBERRY	SWATCH	COACH	IWC
Total (n=1500)	37.9	32.1	28.5	25.1	20.1	19.5	15.9	15.9	12.7	11.7	11.5	11.3	11.1	10.1	8.1	7.5	7.5	6.8	6.5
Hokkaido and Tohoku(n=141)	36.2	28.4	30.5	29.8	18.4	19.1	12.8	9.9	17.0	8.5	14.2	11.3	9.9	8.5	3.5	11.3	6.4	9.9	4.3
Kanto and Koshinetsu(n=696)	34.9	33.6	28.6	24.3	19.3	21.0	16.4	17.8	11.8	11.6	10.3	12.4	10.5	10.3	7.9	7.2	7.8	5.6	7.9
Chubu and Hokuriku (n=185)	43.2	28.6	20.5	23.2	22.2	14.1	14.1	17.3	13.0	13.5	8.6	10.8	8.6	9.7	9.2	4.3	4.9	5.4	5.9
Kansai (n=293)	40.6	31.4	33.8	29.4	21.2	17.1	20.8	13.0	13.0	15.0	16.0	10.2	14.0	7.8	8.5	8.5	8.5	8.9	5.5
Chugoku, Shikoku and Kyushu(n=185)	41.1	33.5	25.9	20.0	21.1	23.2	10.8	16.8	11.9	7.0	9.7	9.7	12.4	14.6	10.3	7.6	8.1	7.0	4.9

2012

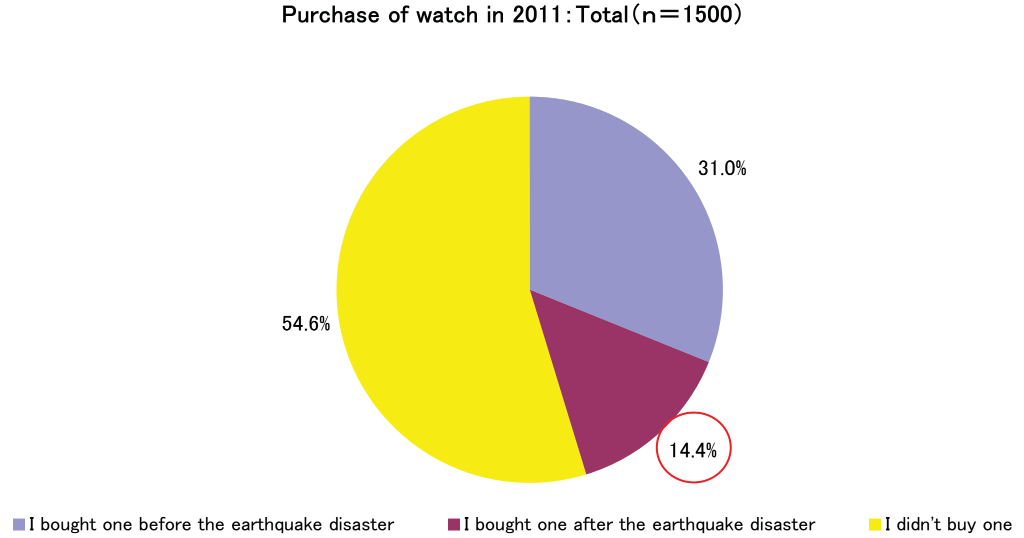


	ROLEX	OMEGA	CARTIER	FRANCK MULLER	BVLGARI	SEIKO	HERMES	TAG HEUER	CASIO	CHANEL	TIFFANY	CITIZEN	GUCCI	LOUIS VUITTON	BREITLING	BURBERRY	COACH	IWC	agnes.b.
Total(n=1500)	35.7	27.7	26.2	22.5	21.3	16.6	14.9	13.4	12.8	12.8	11.2	11.1	10.1	8.1	7.0	6.1	6.0	6.0	5.9
Hokkaido and Tohoku(n=157)	31.8	27.4	23.6	25.5	19.7	18.5	12.1	14.0	12.1	10.2	12.7	13.4	7.6	6.4	6.4	4.5	4.5	6.4	5.7
Kanto and Koshinetsu(n=691)	35.5	29.1	26.5	23.6	21.1	16.5	15.9	15.8	13.9	13.0	10.3	12.6	10.4	8.7	6.5	6.2	6.2	5.5	6.8
Chubu and Hokuriku(n=198)	40.4	30.8	26.8	19.2	20.7	20.2	13.1	8.1	14.1	13.1	11.1	10.1	9.1	8.1	5.1	5.1	5.1	6.6	4.0
Kansai (n=267)	34.8	24.3	26.6	19.5	21.7	14.6	16.5	10.9	9.4	14.2	12.4	8.6	9.0	8.2	9.4	4.5	4.9	7.1	4.1
Chugoku, Shikoku and Kyushu(n=187)	35.8	24.6	26.2	23.5	23.0	14.4	12.8	13.4	12.8	11.8	11.8	8.0	13.4	7.0	8.0	10.7	9.1	5.3	7.0

* The top 3 luxury brands, i.e. “ROLEX”, “OMEGA” and “CARTIER” were in high demand in “Chubu & Hokuriku”.
* There were somewhat high needs for luxury jewelry brand watches such as “CARTIER”, “BVLGARI” and “TIFFANY” in “Kansai” and “Chugoku, Shikoku & Kyushu”.

■ New Questions in the 2012 Survey (regarding watch purchases in 2011)

■Purchase of watch in 2011(all)



■Purchase of watch in 2011(male)

	Male				
	Total(n=750)	20s(n=144)	30s(n=216)	40s(n=207)	50s(n=183)
I bought one before the earthquake disaster	30.3	45.1	29.6	26.6	23.5
I bought one after the earthquake disaster	15.2	19.4	12.0	13.5	17.5
I didn't buy one	54.5	35.4	58.3	59.9	59.0

■Purchase of watch in 2011(female)

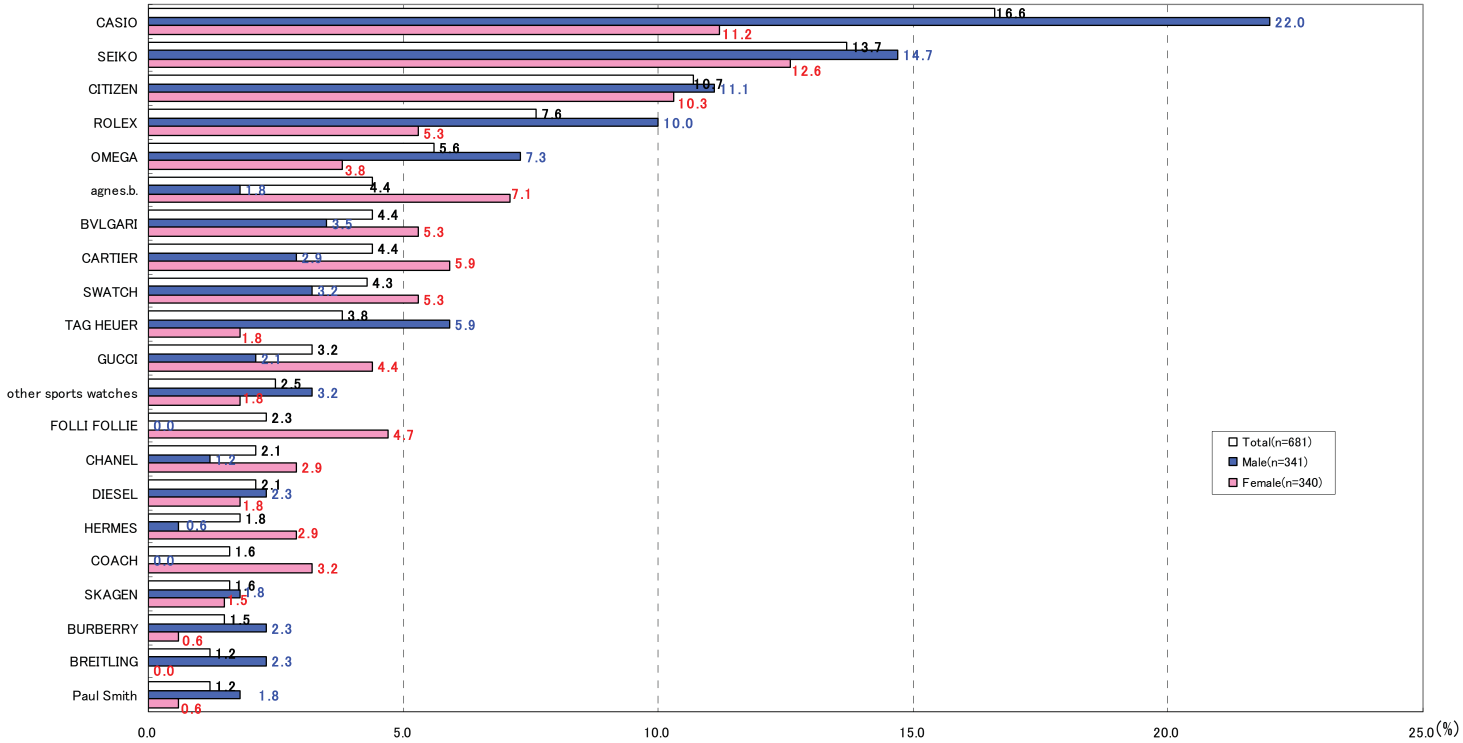
	Female				
	Total(n=750)	20s(n=224)	30s(n=196)	40s(n=175)	50s(n=155)
I bought one before the earthquake disaster	31.7	39.7	27.0	25.7	32.9
I bought one after the earthquake disaster	13.6	17.0	14.3	10.3	11.6
I didn't buy one	54.7	43.3	58.7	64.0	55.5

* In 2011, 45.4% of the respondents purchased a watch.
* Of the 45.4%, only 14.4% responded that they "purchased a watch after the March 11 earthquake disaster", which shows that approximately 70% of the users purchased a watch before March 11.
* Among those who purchased a watch there were high ratios of men and women in their 20s. This was also apparent among those who purchased a watch after the March 11 earthquake.

■Brand of watch you purchased in 2011 (all)

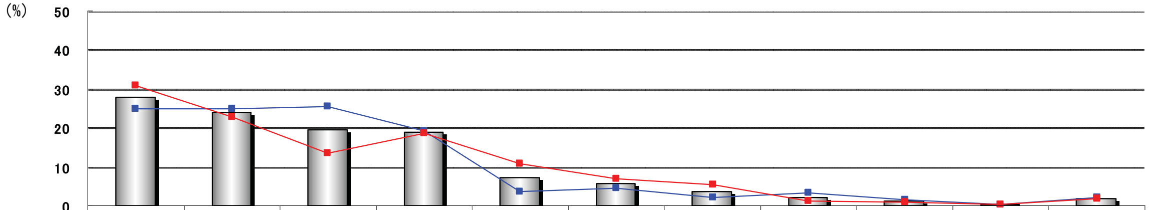
Order	Brand	2012:Total Total n=681
1	CASIO	16.6
2	SEIKO	13.7
3	CITIZEN	10.7
4	ROLEX	7.6
5	OMEGA	5.6
6	agnes.b.	4.4
7	BVLGARI	4.4
8	CARTIER	4.4
9	SWATCH	4.3
10	TAG HEUER	3.8
11	GUCCI	3.2
12	other sports watches	2.5
13	FOLLI FOLLIE	2.3
14	CHANEL	2.1
15	DIESEL	2.1
16	HERMES	1.8
17	COACH	1.6
18	SKAGEN	1.6
19	BURBERRY	1.5
20	BREITLING	1.2
21	Paul Smith	1.2
22	FRANCK MULLER	1.0
23	Marc by Marc Jacobs	1.0
24	NIXON	1.0
25	TIFFANY	1.0
26	HAMILTON	0.9
27	DUNHILL	0.7
28	LONGINES	0.7
29	ORIS	0.7
30	EMPORIO ARMANI	0.6
31	FENDI	0.6
32	PANERAI	0.6
33	AUDEMARS PIGUET	0.4
34	ck CALVIN KLEIN	0.4
35	DIOR	0.4
36	Century	0.3
37	GaGa MILANO	0.3
38	RADO	0.3
39	TISSOT	0.3
40	BLANCPAIN	0.1
41	CHAUMET	0.1
42	GIRARD-PERREGAUX	0.1
43	Montblanc	0.1
44	TENDENCE	0.1
45	Van Cleef & Arpel	0.1

■Brand of watch you purchased in 2011 (by sex)



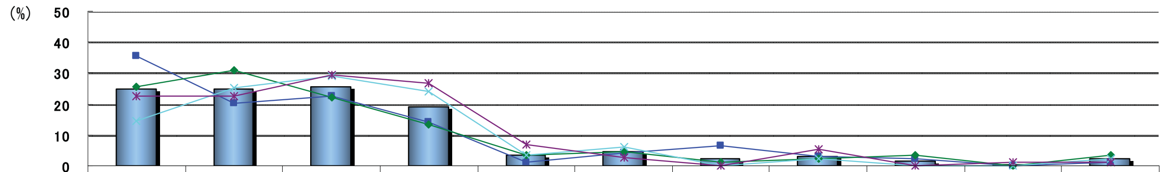
* The three domestic watch brands, “CASIO”, “SEIKO” and “CITIZEN” dominated the top places among watches purchased in 2011.
* Among the top 21 brands were 8 reasonably-priced licensed and imported fashion watch brands. This reflects the high number of purchasers of watches in younger generations as illustrated on the previous page.

■Places where watches were purchased in 2011 (All)



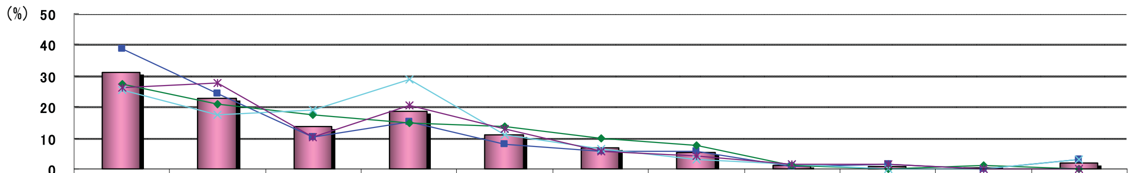
	Watch section at a department store	Watch and clock specialty store; jewelry store	Online shop	Mass retailer; discount store	Duty free shop; overseas shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Total(n=681)	27.9	23.9	19.5	18.8	7.2	5.6	3.7	2.2	1.2	0.3	1.9
Male(n=341)	24.9	24.9	25.5	19.1	3.5	4.4	2.1	3.2	1.5	0.3	2.1
Female(n=340)	30.9	22.9	13.5	18.5	10.9	6.8	5.3	1.2	0.9	0.3	1.8

■Places where watches were purchased in 2011 (Male)



	Watch section at a department store	Watch and clock specialty store; jewelry store	Online shop	Mass retailer; discount store	Duty free shop; overseas shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Male(n=341)	24.9	24.9	25.5	19.1	3.5	4.4	2.1	3.2	1.5	0.3	2.1
Male:20s(n=93)	35.5	20.4	22.6	14.0	1.1	4.3	6.5	3.2	2.2	0.0	1.1
Male:30s(n=90)	25.6	31.1	22.2	13.3	3.3	4.4	1.1	2.2	3.3	0.0	3.3
Male:40s(n=83)	14.5	25.3	28.9	24.1	3.6	6.0	0.0	2.4	0.0	0.0	2.4
Male:50s+(n=75)	22.7	22.7	29.3	26.7	6.7	2.7	0.0	5.3	0.0	1.3	1.3

■Places where watches were purchased in 2011 (Female)



	Watch section at a department store	Watch and clock specialty store; jewelry store	Online shop	Mass retailer; discount store	Duty free shop; overseas shop	Brand boutique	Select shop	Mail-order shop	Person-to-person trade	Antique shop	Others
Female(n=340)	30.9	22.9	13.5	18.5	10.9	6.8	5.3	1.2	0.9	0.3	1.8
Female:20s(n=127)	38.6	24.4	10.2	15.0	7.9	5.5	5.5	0.8	1.6	0.0	3.1
Female:30s(n=81)	27.2	21.0	17.3	14.8	13.6	9.9	7.4	1.2	0.0	1.2	0.0
Female:40s(n=63)	25.4	17.5	19.0	28.6	11.1	6.3	3.2	1.6	0.0	0.0	3.2
Female:50s+(n=69)	26.1	27.5	10.1	20.3	13.0	5.8	4.3	1.4	1.4	0.0	0.0

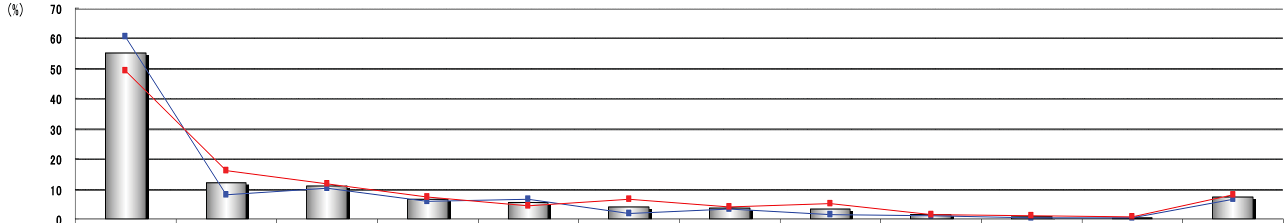
* In 2011, popular places where watches were purchased were “Watch section at a department store”, “Watch and clock specialty store; jewelry store” and “Internet (Online shops)” in this order.

* “Internet” which was the 4th most popular location in the question addressed to all (refer to page 21), moved up to 3rd place. The Internet is becoming more easily accessible for consumers.

* The ratio of males is particularly high for “Internet” and is more so in higher age groups.

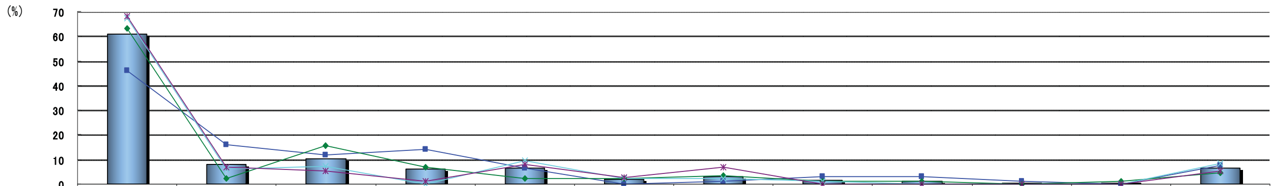
* Meanwhile, among female respondents, “Watch section at a department store” was at the top, as in the question addressed to all (refer to page 23). The ratio of females in their 20s was high as well.

■Timing of purchasing a watch in 2011 (All)



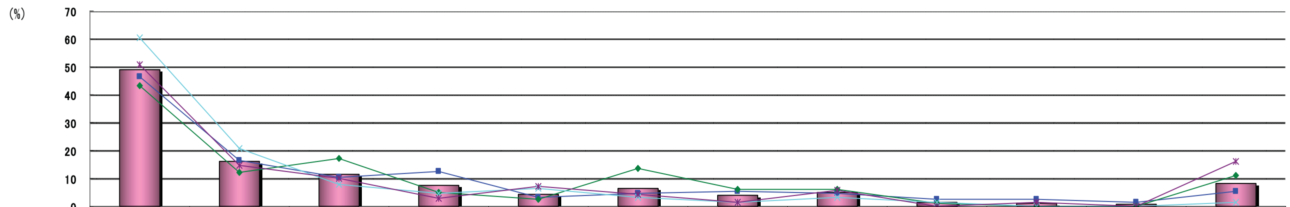
	On non-special occasions regardless of the event (including	Birthday	Bonuses	New job	Bargain	Anniversary/pair watches	Promotion, job change	Christmas	Return for betrothal gift	Valentine's Day	I bought one with the earthquake disaster as a trigger	Other
Total(n=681)	54.9	11.9	10.9	6.6	5.4	4.1	3.7	3.2	1.3	0.7	0.4	7.3
Male(n=341)	60.7	7.9	10.3	5.9	6.5	1.8	3.2	1.5	1.2	0.3	0.3	6.5
Female(n=340)	49.1	15.9	11.5	7.4	4.4	6.5	4.1	5.0	1.5	1.2	0.6	8.2

■Timing of purchasing a watch in 2011 (Male)



	On non-special occasions regardless of the event (including	Birthday	Bonuses	New job	Bargain	Anniversary/pair watches	Promotion, job change	Christmas	Return for betrothal gift	Valentine's Day	I bought one with the earthquake disaster as a trigger	Other
Male(n=341)	60.7	7.9	10.3	5.9	6.5	1.8	3.2	1.5	1.2	0.3	0.3	6.5
Male:20s(n=93)	46.2	16.1	11.8	14.0	6.5	0.0	1.1	3.2	3.2	1.1	0.0	7.5
Male:30s(n=90)	63.3	2.2	15.6	6.7	2.2	2.2	3.3	1.1	1.1	0.0	1.1	4.4
Male:40s(n=83)	67.5	6.0	7.2	0.0	9.6	2.4	2.4	1.2	0.0	0.0	0.0	8.4
Male:50s+(n=75)	68.0	6.7	5.3	1.3	8.0	2.7	6.7	0.0	0.0	0.0	0.0	5.3

■Timing of purchasing a watch in 2011 (Female)



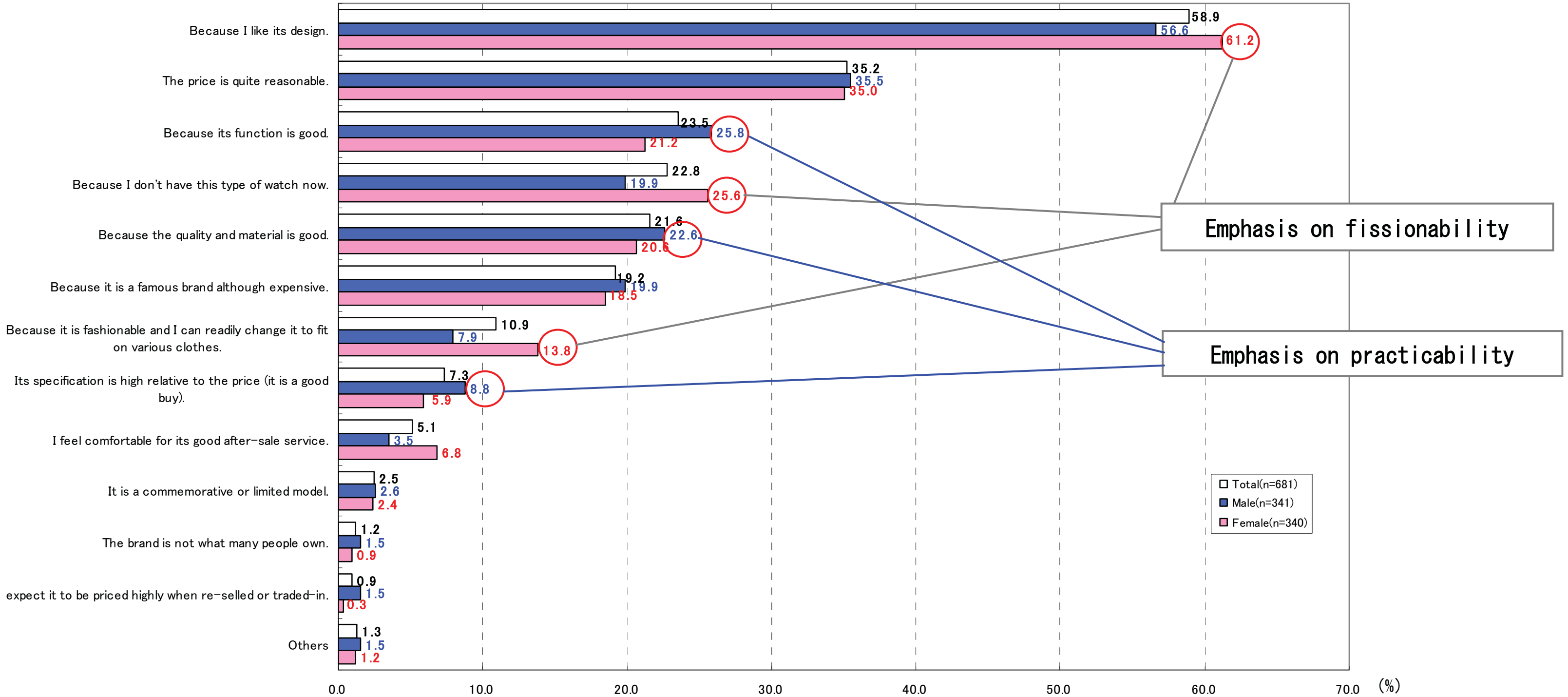
	On non-special occasions regardless of the event (including	Birthday	Bonuses	New job	Bargain	Anniversary/pair watches	Promotion, job change	Christmas	Return for betrothal gift	Valentine's Day	I bought one with the earthquake disaster as a trigger	Other
Female(n=340)	49.1	15.9	11.5	7.4	4.4	6.5	4.1	5.0	1.5	1.2	0.6	8.2
Female:20s(n=127)	46.5	16.5	10.2	12.6	3.1	4.7	5.5	4.7	2.4	2.4	1.6	5.5
Female:30s(n=81)	43.2	12.3	17.3	4.9	2.5	13.6	6.2	6.2	1.2	0.0	0.0	11.1
Female:40s(n=63)	60.3	20.6	7.9	4.8	6.3	3.2	1.6	3.2	1.6	0.0	0.0	1.6
Feamale:50s+(n=69)	50.7	14.5	10.1	2.9	7.2	4.3	1.4	5.8	0.0	1.4	0.0	15.9

* In 2011, the timing of purchasing a watch for the majority of respondents was "At ordinary times regardless of any event", followed by "Birthday" and "Bonus season".

* "Ordinary purchasing" of watches is a tendency stronger among male consumers. Females often purchased watches in commemoration of certain "events" such as "Birthday". Females seem to have needs to buy a watch not only "for herself" but also "as a present" for a man.

* "March 11 earthquake prompted me to buy" accounted for only 0.4% of all respondents. Women, especially those in their 20s, were more prompted than men.

■ Reasons for purchasing a watch in 2011 (all)



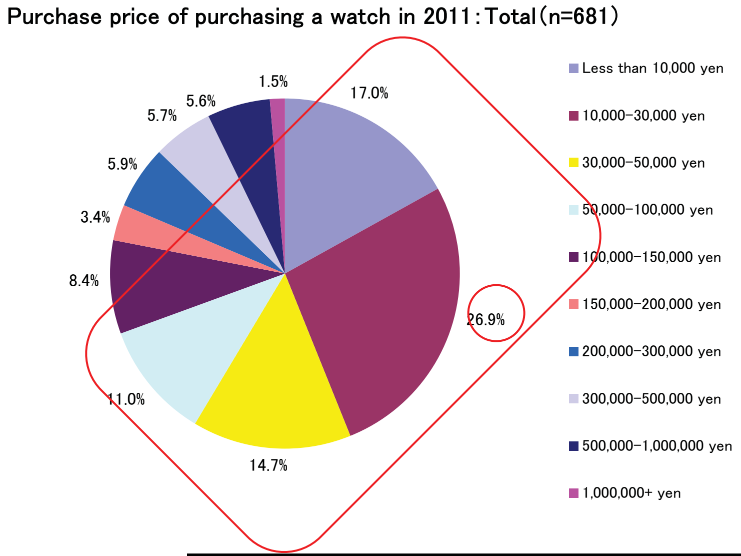
■ Reasons for purchasing a watch in 2011 (by sex)

	Total	Male	Male20s	Male30s	Male40s	Male50s+	Female	Female20s	Female30s	Male40s	Male50s+
	681	341	93	90	83	75	340	127	81	63	69
Because I like its design.	58.9	56.6	57.0	56.7	60.2	52.0	61.2	73.2	55.6	55.6	50.7
The price is quite reasonable.	35.2	35.5	39.8	32.2	34.9	34.7	35.0	42.5	23.5	30.2	39.1
Because its function is good.	23.5	25.8	25.8	24.4	26.5	26.7	21.2	18.1	22.2	20.6	26.1
Because I don't have this type of watch now.	22.8	19.9	12.9	17.8	15.7	36.0	25.6	20.5	23.5	38.1	26.1
Because the quality and material is good.	21.6	22.6	14.0	18.9	28.9	30.7	20.6	17.3	19.8	19.0	29.0
Because it is a famous brand although expensive.	19.2	19.9	16.1	24.4	19.3	20.0	18.5	15.0	23.5	22.2	15.9
Because it is fashionable and I can readily change it to fit on various clothes.	10.9	7.9	6.5	11.1	6.0	8.0	13.8	13.4	16.0	12.7	13.0
Its specification is high relative to the price (it is a good buy).	7.3	8.8	6.5	6.7	12.0	10.7	5.9	6.3	7.4	4.8	4.3
I feel comfortable for its good after-sale service.	5.1	3.5	0.0	2.2	7.2	5.3	6.8	3.1	6.2	6.3	14.5
It is a commemorative or limited model.	2.5	2.6	1.1	2.2	3.6	4.0	2.4	0.8	0.0	0.0	10.1
The brand is not what many people own.	1.2	1.5	2.2	1.1	1.2	1.3	0.9	0.8	1.2	1.6	0.0
I expect it to be priced highly when re-selled or traded-in.	0.9	1.5	0.0	0.0	1.2	5.3	0.3	0.0	0.0	0.0	1.4
Others	1.3	1.5	0.0	2.2	2.4	1.3	1.2	0.0	3.7	1.6	0.0

* Most popular reasons for purchasing a watch in 2011 were “Good design”, “Reasonable price” and “Good function”.
* Especially among females, “Good design”, “Don’t have this type of watch” and “Fashionable and can be readily changed to match various clothes” were high.
* Meanwhile, male respondents were more attached to “practicality” and conscious about the product itself as reflected in the high ratios of responses in “Good function”, “Good quality and material” and “High specifications”.
* The trends in responses for both males and females were similar to those seen in the question addressed to all regarding “Reasons for preferring a specific brand” (refer to page 34).

■Purchase price of purchasing a watch in 2011 (All)

*The list was created based on the “purchase price of the watch you want the most” out of all watches purchased in 2011.



■Purchase price of purchasing a watch in 2011 (Male)

	Male				
	Total(n=341)	20s(n=93)	30s(n=90)	40s(n=83)	50s+(n=75)
Less than 10,000 yen	12.9	16.1	14.4	15.7	4.0
10,000–30,000 yen	29.3	43.0	22.2	26.5	24.0
30,000–50,000 yen	13.8	14.0	11.1	15.7	14.7
50,000–100,000 yen	12.0	9.7	8.9	9.6	21.3
100,000–150,000 yen	8.8	6.5	15.6	7.2	5.3
150,000–200,000 yen	2.9	2.2	1.1	3.6	5.3
200,000–300,000 yen	4.4	2.2	4.4	8.4	2.7
300,000–500,000 yen	7.9	5.4	11.1	7.2	8.0
500,000–1,000,000 yen	6.5	1.1	8.9	4.8	12.0
1,000,000+ yen	1.5	0.0	2.2	1.2	2.7

■Purchase price of purchasing a watch in 2011 (Female)

	Female				
	Total(n=340)	20s(n=127)	30s(n=81)	40s(n=63)	50s+(n=69)
Less than 10,000 yen	21.2	26.8	19.8	17.5	15.9
10,000–30,000 yen	24.4	30.7	17.3	27.0	18.8
30,000–50,000 yen	15.6	14.2	14.8	14.3	20.3
50,000–100,000 yen	10.0	10.2	2.5	15.9	13.0
100,000–150,000 yen	7.9	6.3	16.0	3.2	5.8
150,000–200,000 yen	3.8	0.8	4.9	6.3	5.8
200,000–300,000 yen	7.4	5.5	8.6	4.8	11.6
300,000–500,000 yen	3.5	1.6	3.7	7.9	2.9
500,000–1,000,000 yen	4.7	3.9	9.9	3.2	1.4
1,000,000+ yen	1.5	0.0	2.5	0.0	4.3

* In 2011, approximately 70% of respondents purchased a watch costing “Less than 100,000 yen”. This was especially apparent in men and women in their 20s.
* On the other hand, high ratios of males and females in their 30s (males: 43.3%; females: 45.6%) purchased a watch costing “100,000 yen or above”.

■ Key Findings

Key Findings

	Major Questions	Page	All	Male	Female
1	Number of watches owned?	*16*	■Decrease in the number of owners of two or more watches -Of all respondents, 78.7% owned two or more watches in 2012 (-4.1points compared with 2010)	■Only young men in their 20s account for the increase - 67.4% of men in their 20s who have two or more watches (+4.7 pointscompared with 2010)	■Only senior women in their 50s +account for the increase ・89.1% of female in their 50s+ who have two or more watches (+4.0 points compared with 2010).
2	Brands of watches owned?	*18*	■Big three domestic brands are still dominant; "CASIO" ranked No. 1 ・1st「CASIO」、2nd「SEIKO」、3rd「CITIZEN」 ・High male ownership ratio for "CASIO" and "SEIKO" ・For "CITIZEN", ownership ratio is generally even between males and females	■Males tend to own watch-maker brands ・Brands more popular among men: "CASIO", "SEIKO", "OMEGA" and "TAG HEUER"	■Females tend to own fashion brand watches **・Brands more popular among women: "CARTIER", "GUCCI", "agnes.b", "BVLGARI", "HERMES", "FOLLI FOLLIE" and "CHANEL"**
3	Purchase price of watch owned?	*20*	■Low price ranges still account for roughly 20+% of total ・「Less than 10,000 yen」:5.1%（＋0.3points compared with 2010） ・「10,000-30,000yen」:19.8%（＋2.3points compared with 2010）	■Two clusters in price ranges: low-to-mid and mid-to-high ・「10,000-100,000 yen」:45.1% of all male ・「300,000-500,000 yen」:11.6%of all male	■Two clusters in price ranges: low and mid-to-high ・「10,000-50,000 yen」:43.9%of all female ・「200,000-300,000 yen」:11.7%of all female
4	Location of purchase?	*21*	■While bricks-and-mortar stores remain the mainstream, online-shopping is expanding ・1st:「Watch section at a department store」（51.6%） ・2nd:「Watch and clock specialty store; jewelry store」（43.7%） ・3rd:「Mass retailer; discount store」（30.4%） ・4th:「Online shopping on the "Internet」（20.6%）	■Higher male ratio in online shopping ・Male26.7%:Female14.5%:(Ratio of male to female is 1:0.54) ・While primary users are those in their 30s and 40s, shoppers in their 50s+ are increasing	■Female preference for bricks-and-mortar stores ・Mainly they shop at "Department store. Demand is driven by shoppers in their 20s ・Female chose the answer of "Duty-free shops/Overseas shops" and "Brand boutiques" more often than male
5	Important factors in choosing a retailer?	*25*	■Demand for authorized stores remains high ・1st:「Handles authorized imports」(61.1%) ・2nd:「Reasonableness of price」(46.3%） ・3rd:「Wide assortment」(45.7%)	■Male consumers value price ・「Reasonableness of price」は53.5% behind the top answer of "Handles authorized imports" (55.6%)	■Elements other than product are also important for females ・Women value "After-sale service" (48.8%) and "Atmosphere of the store" (36.5%) more than males
6	Price range of watch you want to buy?	*29*	■Further "lowering" of purchase price ・「10,000-150,000 yen": 41.8% (+6.9 points compared with 2010) ・Especially so for those in their 20s	■Affordable luxury watches amid lowering of purchase prices: ・Purchase price of the watch that respondents want to buy among all male 1st:「300,000-500,000 yen」18.1% 2nd:「500,000～1,000,000yen」16.0% That is, they account for over 34% among all male.	■Affordable luxury watches amid the lowering of purchase prices: ・Purchase price of the watch that respondents want to buy among all female 1st:「300,000-500,000 yen」15.3% 2nd:「200,000-300,000 yen」15.0% That is, they account for over 30% among all female.
7	Brand of the watch you want?	*32*	■Leading three brands remain strong ・1st:「ROLEX」(35.7%) ・2nd:「OMEGA」(27.7%) ・3rd:「CARTIER」(26.2%)	■Men prefer "Luxury mechanical sports watches with high cost performance" ・This has shown the needs for a second or third watch following standard brands such as "ROLEX" and "OMEGA." ・In 2012, "FRANCK MULLER" ranked at 3rd places respectively. (6th in 2010)	■Women favor "Luxury fashion brand watches" ・he top brands favored by women are "CARTIER", "ROLEX", "BVLGARI" and "HERMES". In addition, "FRANCK MULLER" newly ranked in the top 5 (6th in 2010) as in the ranking for males.
8	Reason for wanting the brand you do?	*34*	■Focus on design remains unchanged ・1st:「Design」(63.2%) ・2nd:「Famous brand」(38.8%) ・3rd:「Quality/material」(33.2%)	■Male consumers value practicality ・Popular answers among male ・「Quality/material」(37.2%)・・・・・・・・・・・・・・・・・Female(29.3%） ・「Good functions」(26.5%)・・・・・・・・・・・・・・・・・・Female（16.5%)	■Female consumers value fashionability ・Popular answers among male ・「Can readily change to fit on various clothes」(22.0%)・・・・・・Male(12.3%）
9	Done pre-purchase research?	*35*	■More than half have done advance research ・「I did research in advance」(58.7%) ・「I did not do research in advance」(41.3%)	■Male consumers value information ・「I did research in advance」(62.1%) ・「I did not do research in advance」(37.9%) ・Especially so for those in their 30s and 40s	■No big difference among female consumers between research done and not done ・「I did research in advance」(55.3%) ・「I did not do research in advance」(44.7%)
10	What research have you done in advance?	*36*	■"Price", "Design" and "Specifications" ranked high ・「Price」(88.0%) ・「Design」(85.7%) ・「Specifications」(58.9%)	■Attachment to "the product itself" and "background of the product" ・Popular answers among male ・「Specifications」(64.2%)・・・・・・・・・・・・・・・・・・・・・・・・・・Female(53.0%） ・「Brand (history, concept, culture, tradition）」(36.1%)・・・・Female(27.7%)	■Emphasis on "fashionability" and "reliability and security" ・Popular answers among female ・「Design」(90.6%）・・・・・・・・・・・・・・・・・・・・Male(81.3%） ・「location of store」(20.7%)・・・・・・・・・・・・・・Male(9.7%）
11	Media which are influential in purchasing a watch?	*37*	■Internet-related media ranked high ・1st:「Makers and brands websites」65.3% ・3rd「Informational website」35.9% ・5th「Community/message boards」21.7%	■"Putting importance on information on the Internet" ・1st:「Makers and brands websites」68.9% ・2nd:「Informational website」41.6%	■"Combination of the Internet and storefront" ・1st:「Makers and brands websites」61.2% ・2nd:「At the store」46.5%

This document is a summary. We also have the following documents that go into more detail. If you would like to obtain copies of them, please contact the Federation of the Swiss Watch Industry FH Tokyo Center. We will send these documents free of charge to those who request them using a file transfer service on the Internet after 16th April 2012. If you wish to have them delivered on CD, please tell us so.
If you have any comments, questions, things you do not understand or suggestions for future research after seeing this survey, please feel free to contact the Federation of the Swiss Watch Industry FH Tokyo Center. We will try to reflect them in our next research and help you in any way we can.

■ **Profile of owners of watches costing over 100,000 yen**

■ **Consumer awareness on parallel imports**

■ **Survey on watch repair**

■ **Issues and future of watch industry in Japan**

■ **Consumer awareness of luxury brand products**

etc.

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