



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 2010

(Summary of Survey Results)

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## ■ Summary Outline

# Summary Outline



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 2008.

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 2008 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 19, 2010, 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 19, 2010
  
- **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

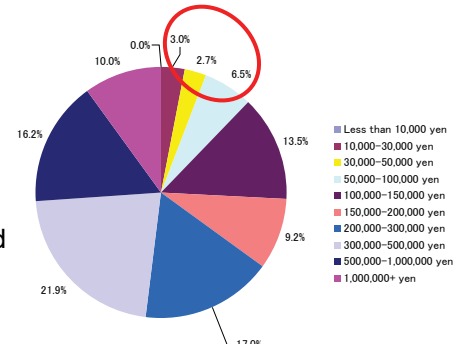


## Price range of watch you want to buy

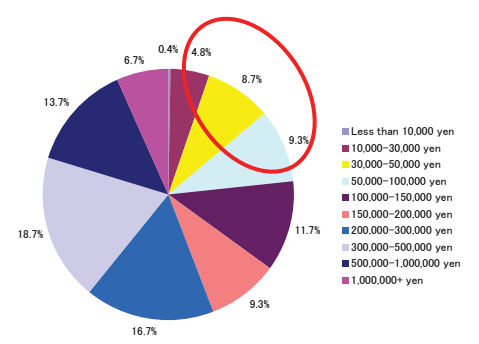
### 1) "Lowering" of purchase price

- The "purchase price of the watch you want" edged lower. The price range of "10,000-100,000 yen" increased +10.6 points compared with 2008.
- By age group, those in their 20s outnumbered other age groups for both male and female.

2008 price range of watch you want to buy: Total (n = 401)



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



### 2) Existence of "affordable high price range"

- While the price of the watch that consumers want to buy "lowered," the answer of "300,000-500,000 yen" was the most popular response for both male and female.
- This is estimated to be the price range of "reasonable luxury watches" and the "watch that a user wants to buy" for those who are interested in watches over 100,000 yen.

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2008 (n = 201)	2010 (n = 544)	2008 (n = 20)	2010 (n = 142)	2008 (n = 73)	2010 (n = 130)	2008 (n = 59)	2010 (n = 152)	2008 (n = 49)	2010 (n = 120)
Less than 10,000 yen	0.0	0.4	0.0	0.7	0.0	0.0	0.0	0.7	0.0	0.0
10,000-30,000 yen	2.5	5.1	0.0	4.9	1.4	6.2	3.4	5.3	4.1	4.2
30,000-50,000 yen	1.5	7.9	0.0	12.7	0.0	5.4	3.4	6.6	2.0	6.7
50,000-100,000 yen	7.3	9.0	5.0	10.6	9.6	9.2	10.2	7.2	0.0	9.2
100,000-150,000 yen	15.9	12.1	20.0	12.7	9.6	16.9	18.6	8.6	20.4	13.3
150,000-200,000 yen	9.0	9.0	15.0	12.7	9.6	9.2	5.1	7.2	10.2	6.7
200,000-300,000 yen	15.9	16.2	20.0	13.4	17.8	15.4	10.2	23.7	18.4	10.8
300,000-500,000 yen	16.7	18.8	10.0	10.6	23.3	20.8	15.3	19.1	10.2	22.5
500,000-1,000,000 yen	17.9	13.8	15.0	15.5	19.2	11.5	11.9	12.5	24.5	15.8
1,000,000+ yen	13.9	7.6	15.0	6.3	9.6	5.4	22.0	9.2	10.2	10.8

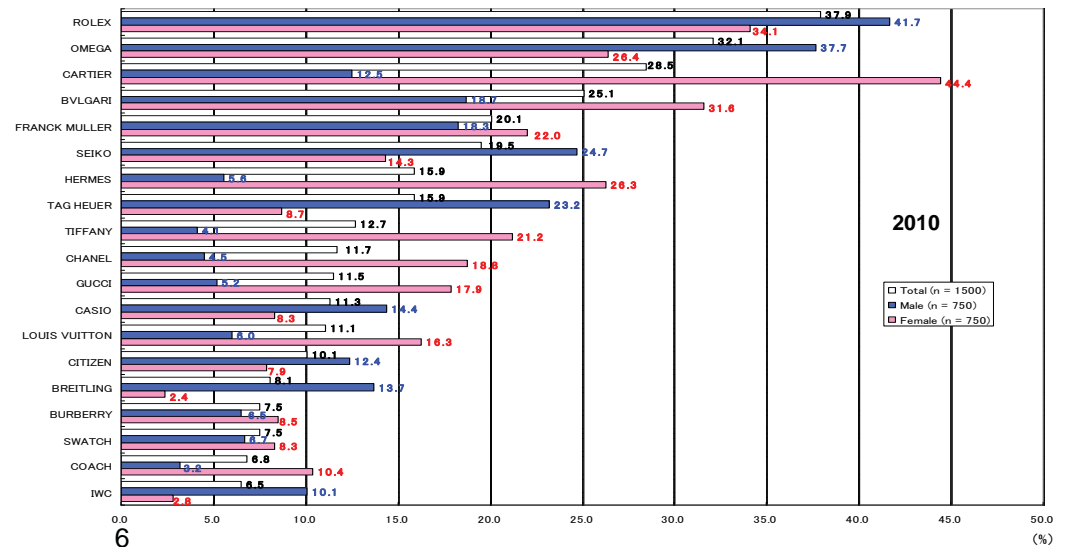
  

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2008 (n = 200)	2010 (n = 496)	2008 (n = 34)	2010 (n = 127)	2008 (n = 62)	2010 (n = 127)	2008 (n = 74)	2010 (n = 140)	2008 (n = 30)	2010 (n = 102)
Less than 10,000 yen	0.0	0.4	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0
10,000-30,000 yen	3.5	4.4	5.9	11.8	0.0	2.4	4.8	2.1	0.0	1.0
30,000-50,000 yen	4.0	9.5	2.9	18.1	3.2	7.1	4.1	6.4	6.7	5.9
50,000-100,000 yen	6.0	9.7	20.6	11.8	4.8	11.0	0.0	5.0	6.7	11.8
100,000-150,000 yen	11.0	10.7	11.8	9.4	6.5	7.1	12.2	14.3	16.7	11.8
150,000-200,000 yen	9.5	9.7	2.9	5.5	11.3	11.8	6.8	12.9	20.0	7.8
200,000-300,000 yen	18.0	17.5	18.7	14.7	8.7	17.7	17.3	20.0	18.0	24.5
300,000-500,000 yen	27.5	18.4	20.6	18.9	33.9	23.6	27.0	18.6	23.3	15.7
500,000-1,000,000 yen	14.5	13.5	14.7	9.4	16.1	14.2	14.9	16.4	10.0	13.7
1,000,000+ yen	6.0	5.4	5.9	4.7	6.5	5.5	5.4	4.3	6.7	7.8

## Next desired purchase

### Male want a "luxury mechanical sports watch" and female want a "luxury fashion watch"

- Both male and female still have strong needs for "ROLEX" and "OMEGA."
- In 2010 "BREITLING" and "IWC" ranked highly for male.
- For female, "LOUIS VUITTON" (+8.7 points compared with 2008), "CHANEL" (+8.3 points) and "GUCCI" (+6.6 points) proved significantly more popular.
- Especially for male, we saw demand for a second or third watch that has more advanced functions and specifications in relation to its price (high cost performance) in addition to standard models in the price range of "200,000-300,000 yen."



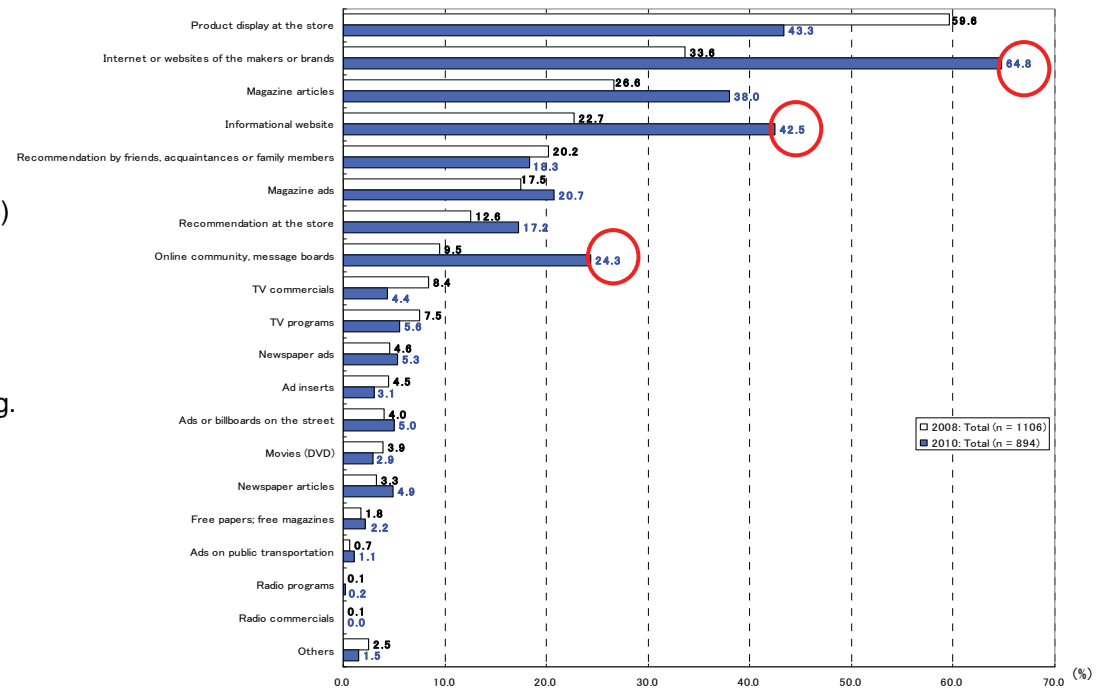
# Review: 2



## Media which are influential in purchasing

### Increase in Internet-related information

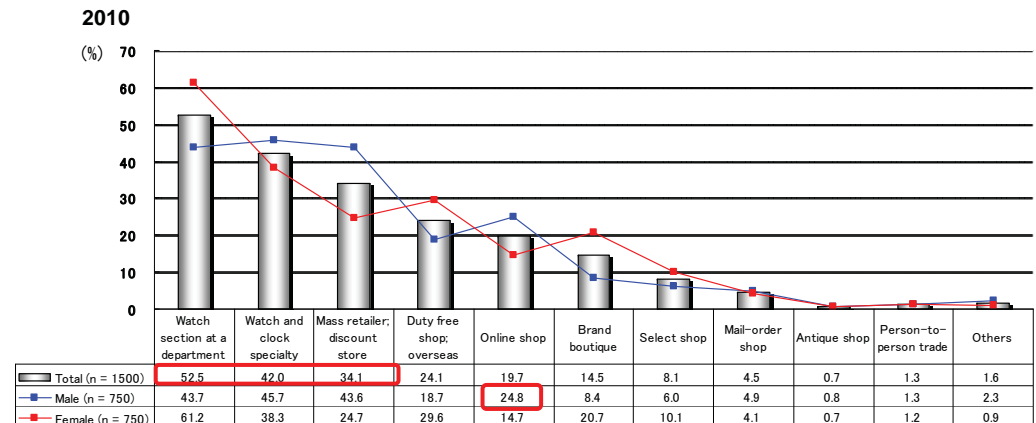
- With “Websites of makers/brands” 64.8% (+31.2 points compared with 2008) at the top, “Informational websites” and “Community/message boards” follow with 42.5% (+19.8 points) and 24.3% (+14.8 points) respectively.
- In addition to the diversification of consumer needs, against the background of the “increase in savvy consumers” who scrutinize the balance between the price and quality of a product, the high convenience of the Internet, where one can obtain product information and easily compare prices, became outstanding.



## Location of actual purchase

### Bricks-and-mortar stores remain the mainstream; male dominate the Internet

- “Watch section of a department store” (52.5%) still holds the top spot in “Store that you often use when purchasing a watch.” “Watch and clock specialty store; jewelry store” (42.0%) and “Mass retailer; discount store” (34.1%) follow, occupying the top three places.
- Male seem relatively more comfortable with online shopping. The difference in consumer awareness is that female emphasize fashionableness (more necessity to put watch on at the store) and male focus on functions and specifications (less necessity to put watch on at the store) and this seems to affect the way consumers buy watches.





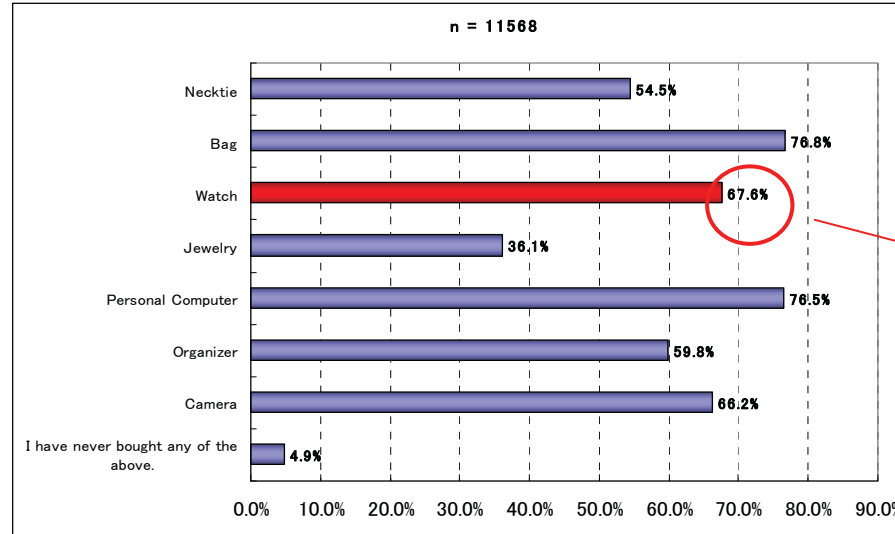
■ **Screening survey: Sample size of 11,568**



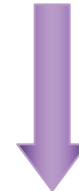
# Screening survey (extracting survey subjects)



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: **7,819**

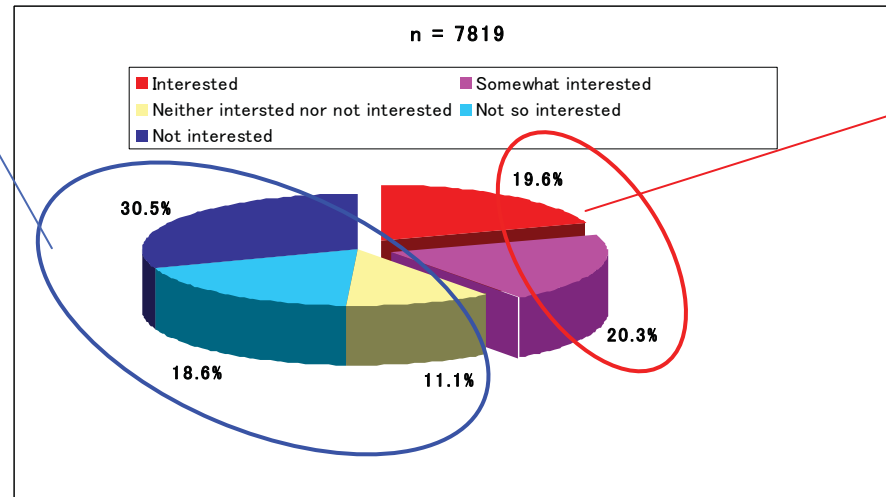


Furthermore...

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)

**60.1%**



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

**39.9%**



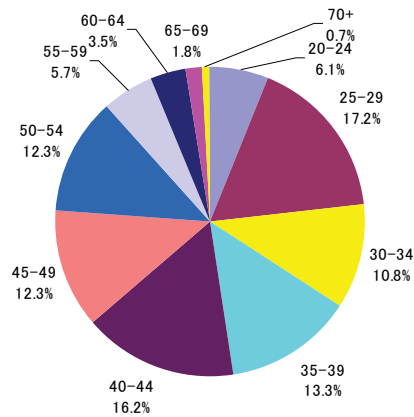
## ■ **Survey Results 1: Subjects' Profile** **(sample size of 1,500)**

# Subjects' Profile (basic attributes)



## Sex and age distribution

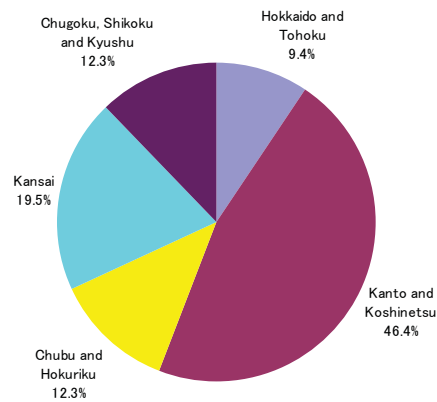
2010: Total (n = 1500)



	Total	Male	Female
n	1500	750	750
20-24	6.1	5.5	6.8
25-29	17.2	18.5	15.9
30-34	10.8	8.3	13.3
35-39	13.3	14.7	11.9
40-44	16.2	15.2	17.2
45-49	12.3	14.0	10.7
50-54	12.3	12.4	12.3
55-59	5.7	5.2	6.1
60-64	3.5	3.7	3.3
65-69	1.8	1.6	2.0
70+	0.7	0.9	0.5

## Geographical distribution

2010: Total (n = 1500)



## Occupational distribution

	Total	Male	Female
n	1500	750	750
Company employee	49.1	66.5	31.6
Government employee	5.4	7.7	3.1
Company executive	2.8	4.5	1.1
Self-owned business	5.1	7.2	3.1
Freelance	2.5	2.5	2.4
Part-time employee	11.4	2.3	20.5
Homemaker	15.3	0.0	30.7
Student	2.9	3.5	2.4
Unemployed	3.7	4.5	2.8
Others	1.8	1.2	2.4

## Marital status

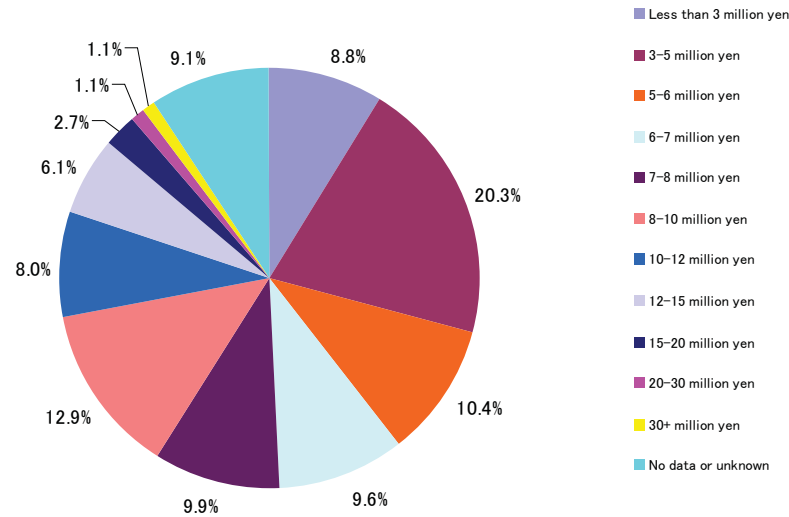
	Total	Male	Female
n	1500	750	750
Single	36.2	39.2	33.2
Married	63.8	60.8	66.8

## Family structure

	Total	Male	Female
n	1500	750	750
Spouse	62.7	60.4	64.9
Children	42.5	44.0	41.1
Parents	27.9	29.7	26.0
Siblings	10.0	10.4	9.6
Others	3.1	2.5	3.6
Living alone	15.4	18.8	12.0

■ Household annual income (all)

2010: Total (n = 1500)



■ Household annual income (male)

	Male				
	Total (n = 750)	20s (n = 180)	30s (n = 172)	40s (n = 219)	50s+ (n = 179)
Less than 3 million yen	8.0	16.1	7.0	4.1	5.6
3-5 million yen	19.2	27.2	26.2	14.2	10.6
5-6 million yen	12.0	11.7	16.3	11.0	9.5
6-7 million yen	10.4	6.7	12.2	12.8	9.5
7-8 million yen	10.3	4.4	10.5	12.8	12.8
8-10 million yen	14.4	10.6	14.5	18.7	12.8
10-12 million yen	7.9	5.6	6.4	5.9	14.0
12-15 million yen	6.0	3.3	3.5	5.9	11.2
15-20 million yen	2.7	1.7	0.0	2.7	6.1
20-30 million yen	0.9	0.6	0.6	2.3	0.0
30+ million yen	0.9	1.7	0.0	1.4	0.6
No data or unknown	7.3	10.6	2.9	8.2	7.3

■ Household annual income (female)

	Female				
	Total (n = 750)	20s (n = 170)	30s (n = 189)	40s (n = 209)	50s+ (n = 182)
Less than 3 million yen	9.6	12.9	8.5	11.5	5.5
3-5 million yen	21.3	29.4	26.5	11.5	19.8
5-6 million yen	8.8	11.2	12.2	6.7	5.5
6-7 million yen	8.8	7.6	7.4	11.0	8.8
7-8 million yen	9.6	4.7	12.7	12.9	7.1
8-10 million yen	11.3	6.5	11.6	13.4	13.2
10-12 million yen	8.1	4.7	6.9	11.5	8.8
12-15 million yen	6.3	4.1	2.6	6.7	11.5
15-20 million yen	2.8	4.7	0.0	3.8	2.7
20-30 million yen	1.3	1.2	0.5	0.5	3.3
30+ million yen	1.2	0.6	0.5	1.0	2.7
No data or unknown	10.8	12.4	10.6	9.6	11.0

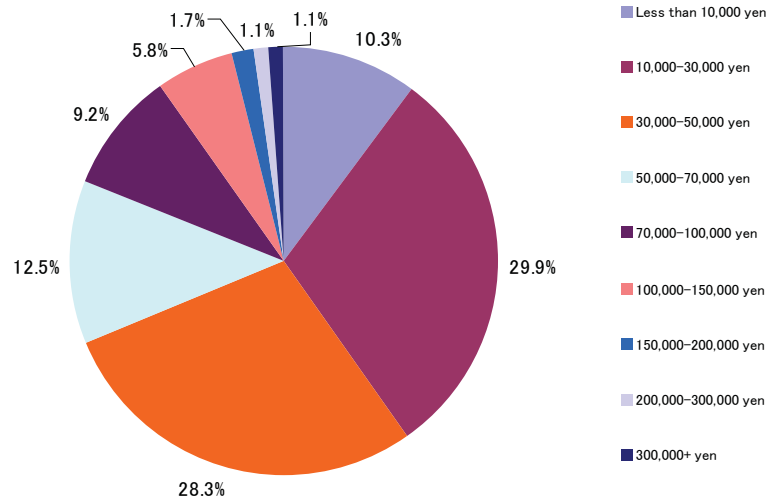
\* Total average: 7,193,000 yen; male average: 7,254,000 yen; female average: 7,133,000 yen

\*Average by sex and age group (male) ... Male in their 20s: 6,294,000 yen; Male in their 30s: 6,255,000 yen; Male in their 40s: 8,113,000 yen, Male aged 50+: 8,270,000 yen

Average by sex and age group (female) ... Female in their 20s: 6,000,000 yen; Female in their 30s: 5,896,000 yen; Female in their 40s: 7,492,000 yen; Female aged 50+: 9,052,000 yen

■ Allowance (monthly: all)

2010: Total (n = 1500)



■ Allowance (monthly: male)

	Male				
	Total male (n = 750)	20s (n = 180)	30s (n = 172)	40s (n = 219)	50s+ (n = 179)
Less than 10,000 yen	6.8	7.2	8.1	8.2	3.4
10,000-30,000 yen	25.2	26.7	32.6	19.6	23.5
30,000-50,000 yen	32.8	32.2	31.4	33.3	34.1
50,000-70,000 yen	15.9	12.8	12.2	18.3	19.6
70,000-100,000 yen	8.5	7.2	8.7	8.2	10.1
100,000-150,000 yen	6.3	8.3	5.2	5.5	6.1
150,000-200,000 yen	1.9	2.8	0.6	2.3	1.7
200,000-300,000 yen	1.1	2.2	0.6	0.9	0.6
300,000+ yen	1.6	0.6	0.6	3.7	1.1

■ Allowance (monthly: female)

	Female				
	Total female (n = 750)	20s (n = 170)	30s (n = 189)	40s (n = 209)	50s+ (n = 182)
Less than 10,000 yen	13.7	11.8	19.0	15.3	8.2
10,000-30,000 yen	34.7	32.9	37.0	33.5	35.2
30,000-50,000 yen	23.9	20.6	19.6	28.2	26.4
50,000-70,000 yen	9.2	11.8	5.8	8.6	11.0
70,000-100,000 yen	9.9	12.4	8.5	9.1	9.9
100,000-150,000 yen	5.3	6.5	7.9	3.8	3.3
150,000-200,000 yen	1.6	1.8	1.6	0.5	2.7
200,000-300,000 yen	1.2	2.4	0.0	1.0	1.6
300,000+ yen	0.5	0.0	0.5	0.0	1.6

\* Total average: 53,000 yen, male average: 60,000 yen, female average: 47,000 yen

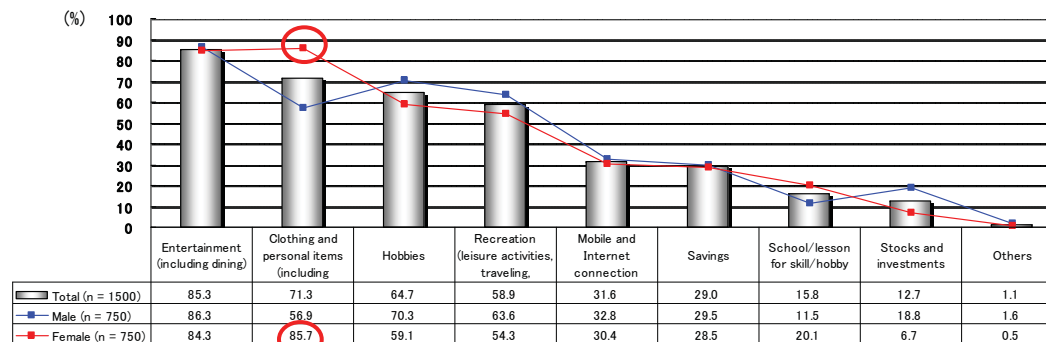
\* Average by sex and age group (male) ... Male in their 20s: 57,000 yen; Male in their 30s: 47,000 yen; Male in their 40s: 73,000 yen; Male aged 50+: 58,000 yen  
 Average by sex and age group (female) ... Female in their 20s: 50,000 yen; Female in their 30s: 43,000 yen; Female in their 40s: 40,000 yen; Female aged 50+: 56,000 yen

\* We found that both male and female in their 30s have less money that they can freely spend, compared with other age groups.



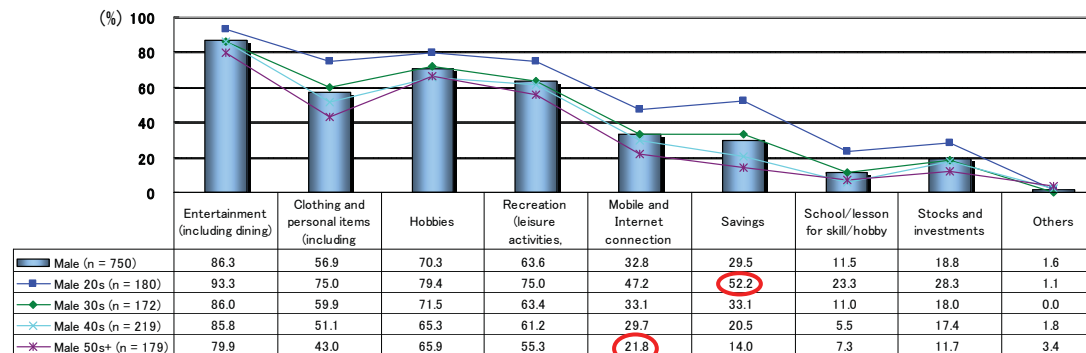
■ What to spend allowance on (monthly: all)

2010



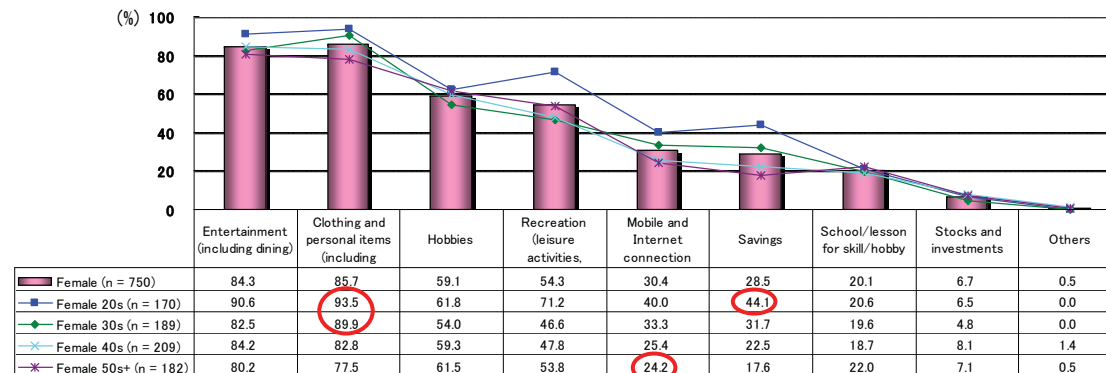
■ What to spend allowance on (monthly: male)

2010



■ What to spend allowance on (monthly: female)

2010



\* "Entertainment," "Clothing and personal items," "hobbies" and "recreation" ranked high in the list.

\* Female's willingness to purchase clothing and personal items is higher than male, mainly among those in their 20s and 30s.

\* "Mobile and Internet connection fee" ranked 5th for all subjects as the item that they spent their allowance on. One out of four male and female aged 50 or older also chose this answer.

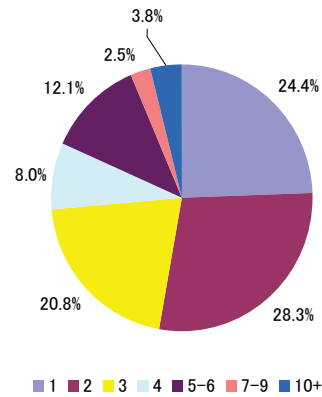
\* Moreover, probably because of the current severe labor market and concern for the future, male and female in their 20s gave the answer of "Savings" much more than other age groups.



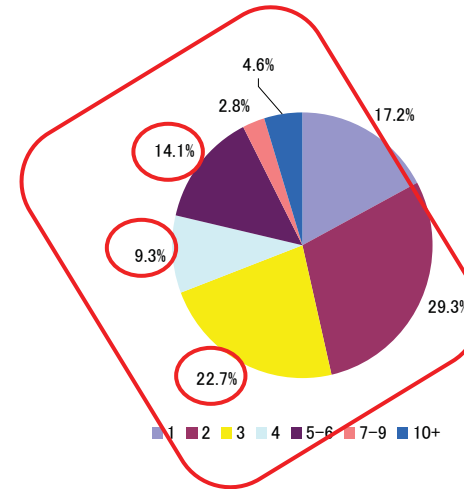
## ■ **Survey Results 2: Main Survey** **(sample size of 1,500)**

■ Number of watches owned (all)

Number of watches owned in 2008: Total (n = 1106)



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



■ Number of watches owned (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2008 (n = 538)	2010 (n = 750)	2008 (n = 91)	2010 (n = 180)	2008 (n = 183)	2010 (n = 172)	2008 (n = 148)	2010 (n = 219)	2008 (n = 116)	2010 (n = 179)
1	26.2	18.5	42.9	37.2	28.4	18.0	18.2	11.9	19.8	8.4
2	26.4	30.5	37.4	33.3	28.4	33.7	19.6	29.2	23.3	26.3
3	20.8	21.5	12.1	19.4	19.1	23.3	25.7	17.8	24.1	26.3
4	7.4	8.5	1.1	2.8	6.6	10.5	11.5	9.1	8.6	11.7
5-6	12.5	12.5	3.3	4.4	10.4	7.6	18.2	19.2	15.5	17.3
7-9	2.8	2.7	1.1	1.1	3.8	2.9	3.4	3.2	1.7	3.4
10+	3.9	5.7	2.2	1.7	3.3	4.1	3.4	9.6	6.9	6.7

■ Number of watches owned (female)

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2008 (n = 568)	2010 (n = 750)	2008 (n = 130)	2010 (n = 170)	2008 (n = 174)	2010 (n = 189)	2008 (n = 175)	2010 (n = 209)	2008 (n = 89)	2010 (n = 182)
1	22.7	15.9	39.2	21.2	20.7	18.0	14.9	10.5	18.0	14.8
2	30.1	28.0	36.9	42.9	23.6	28.0	29.1	20.6	34.8	22.5
3	20.8	24.0	14.6	21.8	24.7	19.6	21.7	27.8	20.2	26.4
4	8.6	10.1	3.1	4.7	9.8	11.1	10.9	12.0	10.1	12.1
5-6	11.8	15.6	3.8	6.5	14.4	15.9	13.7	21.1	14.6	17.6
7-9	2.3	2.9	1.5	2.4	2.3	4.8	3.4	2.9	1.1	1.6
10+	3.7	3.5	0.8	0.6	4.6	2.6	6.3	5.3	1.1	4.9

\* In 2010, the proportion of "people who own two or more watches" grew. The proportion of those who own two or more out of the total was 82.8% (+7.2 points compared with 2008).

\* In particular, regarding the question of how many watches they owned, the answer of "3" watches was up 1.9 points, "4" was up 1.3 points and "5-6" was up 2.0 points compared with 2008.

\* The proportion of people who owned two or more watches increased for both male and female. Male in their 30s and 50s and female in their 20s especially increased significantly.



■ Brand of watch owned (ranking comparison 2008-2010)



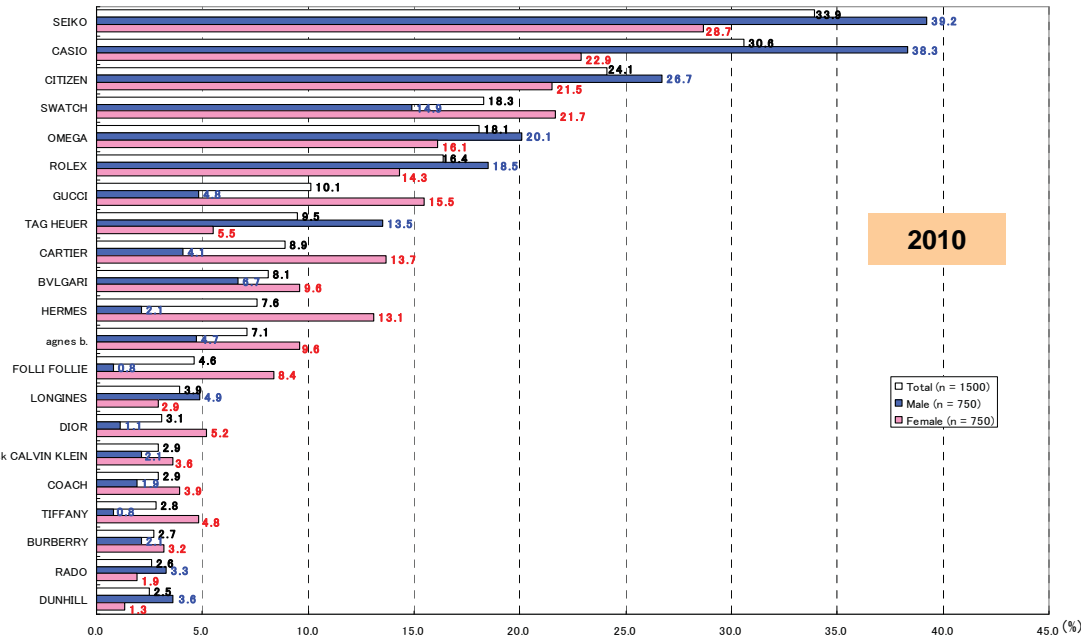
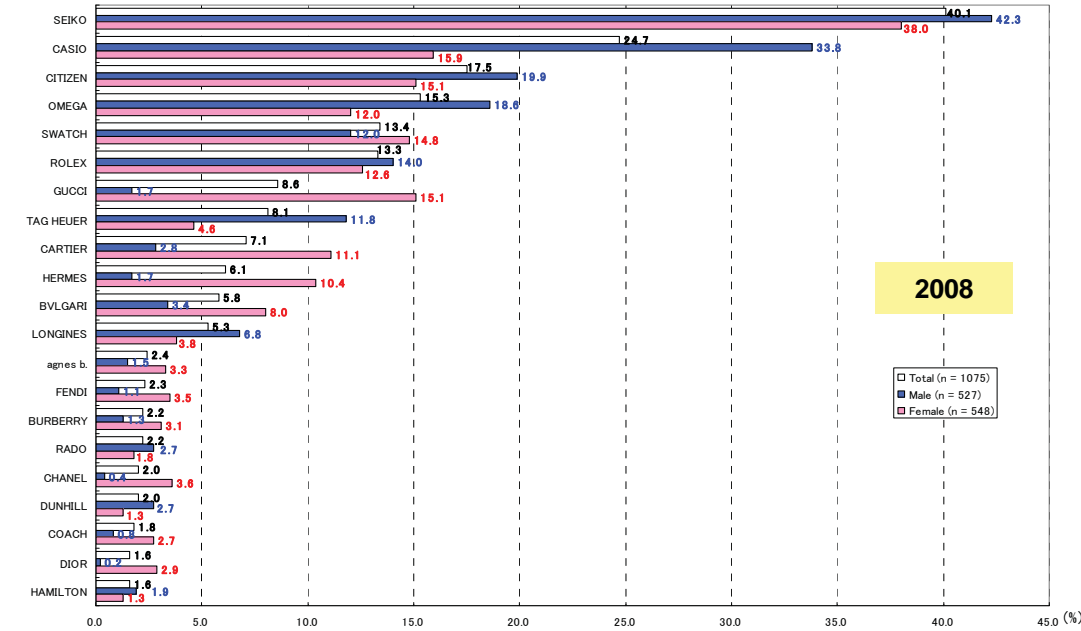
2008			2010			
Order	Brand	Total n = 1075		Order	Brand	Total n = 1500
1	SEIKO	40.1	→	1	SEIKO	33.9
2	CASIO	24.7	→	2	CASIO	30.6
3	CITIZEN	17.5	→	3	CITIZEN	24.1
4	OMEGA	15.3	↘	4	SWATCH	18.3
5	SWATCH	13.4	↗	5	OMEGA	18.1
6	ROLEX	13.3	→	6	ROLEX	16.4
7	GUCCI	8.6	→	7	GUCCI	10.1
8	TAG HEUER	8.1	→	8	TAG HEUER	9.5
9	CARTIER	7.1	→	9	CARTIER	8.9
10	HERMES	6.1	↘	10	BVLGARI	8.1
11	BVLGARI	5.8	↗	11	HERMES	7.6
12	LONGINES	5.3	↘	12	agnes b.	7.1
13	agnes b.	2.4	↗	13	FOLLI FOLLIE	4.6
14	FENDI	2.3	-	14	LONGINES	3.9
15	BURBERRY	2.2	↘	15	DIOR	3.1
16	RADO	2.2	↘	16	ck CALVIN KLEIN	2.9
17	CHANEL	2.0	↘	17	COACH	2.9
18	DUNHILL	2.0	↘	18	TIFFANY	2.8
19	COACH	1.8	↗	19	BURBERRY	2.7
20	DIOR	1.6	↗	20	RADO	2.6
21	HAMILTON	1.6	↘	21	DUNHILL	2.5
22	ck CALVIN KLEIN	1.3	↗	22	CHANEL	2.4
23	TIFFANY	1.3	↗	23	HAMILTON	2.3
24	ORIS	1.2	-	24	BREITLING	2.1
25	BREITLING	1.1	↗	25	FRANCK MULLER	2.0
26	FOLLI FOLLIE	0.9	↗	26	LOUIS VUITTON	1.9

\* Beginning with the top three brands “SEIKO,” “CASIO,” and “CITIZEN,” there has been no big change in ranking within the top 13 brands.

\* The brands that rose in the rankings significantly were “DIOR”:- +5 notches; “ck CALVIN KLEIN”:- +6 notches; “TIFFANY”:- +5 notches and “FOLLI FOLLIE”:- +13 notches.

\* In 2010, replacing “FENDI” and “ORIS,” “FRANCK MULLER” and “LOUIS VUITTON” ranked in.

■ Brand of watch owned (by sex)



\* In 2010, the top 3 brands were the domestic watch brands of “SEIKO,” “CASIO” and “CITIZEN.”

The proportion of the top brand “SEIKO” out of the total decreased. On the other hand, second-placed “CASIO” and third-placed “CITIZEN” increased by +5.9 points and +6.6 points respectively compared with 2008.

\* In addition, the brands whose response rates grew relatively significantly were “SWATCH”: +4.9 points compared with 2008 and “agnes b.”: +4.7 points. \* “CASIO” and “CITIZEN” increased for both male and female. Female led the increase in “SWATCH” and “agnes b.” for all.

\* Advanced function watches remain popular with male and fashion brand products remain popular with female.

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



2008

Brand	Total	Male	Male 20s	Male 30s	Male 40s	Male 50s+	Female	Female 20s	Female 30s	Female 40s	Female 50s+
Number of respondents	1075	527	88	179	145	115	548	121	170	171	86
SEIKO	40.1	42.3	29.5	33.5	45.5	61.7	38.0	26.4	32.9	40.9	58.1
CASIO	24.7	33.8	34.1	36.9	39.3	21.7	15.9	9.9	20.0	18.7	10.5
CITIZEN	17.5	19.9	6.8	17.3	25.5	27.0	15.1	8.3	15.9	14.0	25.6
OMEGA	15.3	18.6	17.0	20.1	20.0	15.7	12.0	6.6	10.0	15.8	16.3
SWATCH	13.4	12.0	17.0	10.6	15.9	5.2	14.8	9.9	21.2	16.4	5.8
ROLEX	13.3	14.0	4.5	12.8	18.6	17.4	12.6	5.8	13.5	13.5	18.6
GUCCI	8.6	1.7	0.0	2.2	0.7	3.5	15.1	13.2	15.9	18.1	10.5
TAG HEUER	8.1	11.8	1.1	13.4	17.9	9.6	4.6	3.3	6.5	4.1	3.5
CARTIER	7.1	2.8	1.1	2.8	3.4	3.5	11.1	5.0	11.8	15.8	9.3
HERMES	6.1	1.7	2.3	1.1	1.4	2.6	10.4	4.1	11.8	14.6	8.1
BVLGARI	5.8	3.4	1.1	4.5	3.4	3.5	8.0	7.4	8.2	8.8	7.0
LONGINES	5.3	6.8	0.0	3.9	6.2	17.4	3.8	0.8	3.5	5.3	5.8
agnes b.	2.4	1.5	2.3	2.8	0.7	0.0	3.3	4.1	4.7	2.9	0.0
FENDI	2.3	1.1	0.0	2.2	0.7	0.9	3.5	2.5	2.9	5.3	2.3
BURBERRY	2.2	1.3	0.0	0.6	1.4	3.5	3.1	0.8	4.1	1.8	7.0
RADO	2.2	2.7	0.0	0.6	2.8	7.8	1.8	0.0	2.4	1.8	3.5
CHANEL	2.0	0.4	0.0	0.0	1.4	0.0	3.6	0.8	2.4	6.4	4.7
DUNHILL	2.0	2.7	1.1	0.6	5.5	3.5	1.3	0.0	1.8	1.8	1.2
COACH	1.8	0.8	0.0	0.6	1.4	0.9	2.7	0.8	4.7	1.8	3.5
DIOR	1.6	0.2	0.0	0.0	0.0	0.9	2.9	0.0	4.7	4.1	1.2
HAMILTON	1.6	1.9	0.0	3.4	2.8	0.0	1.3	0.8	1.8	1.2	1.2
ck CALVIN KLEIN	1.3	0.8	1.1	1.1	0.0	0.9	1.8	0.8	1.8	2.9	1.2
TIFFANY	1.3	0.2	0.0	0.0	0.7	0.0	2.4	0.8	3.5	1.8	3.5
ORIS	1.2	1.9	0.0	1.7	2.8	2.6	0.5	0.8	1.2	0.0	0.0
BREITLING	1.1	1.9	0.0	2.8	1.4	2.6	0.4	0.0	0.6	0.6	0.0
FOLLI FOLLIE	0.9	0.0	0.0	0.0	0.0	0.0	1.8	3.3	2.4	1.2	0.0

(Numbers are percentages)

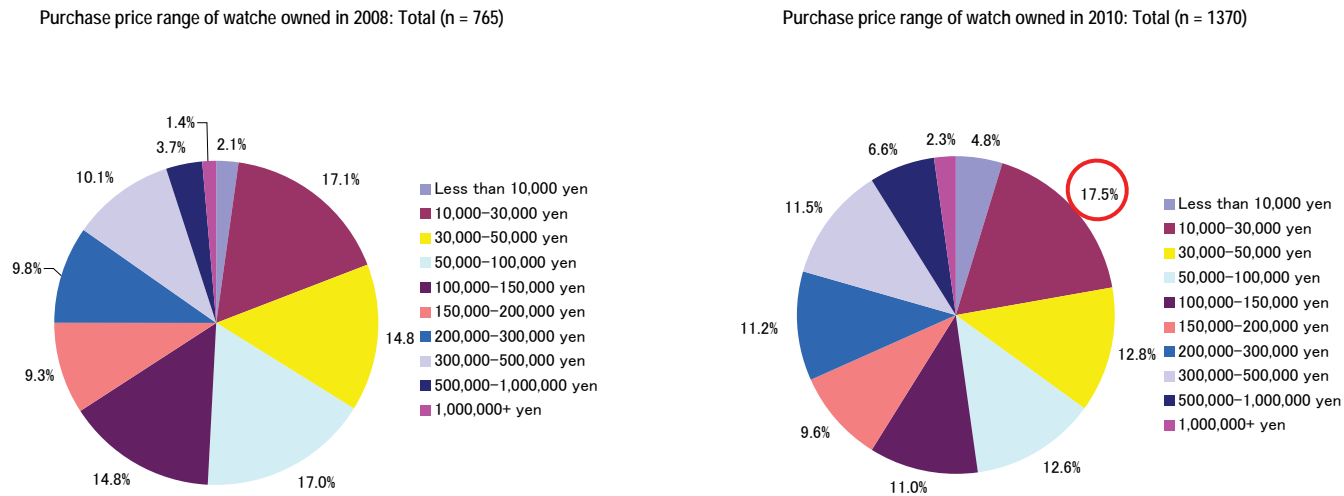
2010

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
FOLLI FOLLIE	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)

■ Purchase price of watch owned (all)

\*In the 2010 survey, the list was created based on the “purchase price of favorite watch” out of all watches owned.



■ Purchase price of watch owned (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2008 (n = 381)	2010 (n = 691)	2008 (n = 51)	2010 (n = 161)	2008 (n = 133)	2010 (n = 154)	2008 (n = 117)	2010 (n = 205)	2008 (n = 80)	2010 (n = 171)
Less than 10,000 yen	1.8	4.1	5.9	6.2	2.3	5.8	0.0	2.0	1.3	2.9
10,000-30,000 yen	19.2	18.4	27.5	29.8	26.3	20.1	17.1	14.1	5.0	11.1
30,000-50,000 yen	12.9	13.0	23.5	20.5	12.0	11.0	12.8	10.7	7.5	10.5
50,000-100,000 yen	16.5	13.7	11.8	14.9	12.8	9.7	19.7	12.2	21.3	18.1
100,000-150,000 yen	15.5	10.7	2.0	6.2	12.8	11.7	14.5	11.2	30.0	13.5
150,000-200,000 yen	7.3	9.6	9.8	5.6	3.8	9.1	9.4	13.2	8.8	9.4
200,000-300,000 yen	9.7	9.6	5.9	6.8	9.8	12.3	11.1	11.2	10.0	7.6
300,000-500,000 yen	13.1	11.4	9.8	6.2	17.3	11.0	10.3	14.6	12.5	12.9
500,000-1,000,000 yen	2.1	6.8	2.0	3.1	1.5	7.8	2.6	8.3	2.5	7.6
1,000,000+ yen	1.8	2.7	2.0	0.6	1.5	1.3	2.6	2.4	1.3	6.4

■ Purchase price of watch owned (female)

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2008 (n = 384)	2010 (n = 679)	2008 (n = 79)	2010 (n = 149)	2008 (n = 119)	2010 (n = 171)	2008 (n = 126)	2010 (n = 190)	2008 (n = 60)	2010 (n = 169)
Less than 10,000 yen	2.3	5.6	5.1	10.1	3.4	7.6	0.8	3.2	0.0	2.4
10,000-30,000 yen	15.1	16.6	29.1	29.5	14.3	15.8	9.5	13.2	10.0	10.1
30,000-50,000 yen	16.7	12.5	24.1	21.5	11.8	10.5	15.1	10.5	20.0	8.9
50,000-100,000 yen	17.4	11.5	16.5	10.1	18.5	8.8	20.6	10.5	10.0	16.6
100,000-150,000 yen	14.1	11.3	8.9	4.0	15.1	13.5	13.5	12.6	20.0	14.2
150,000-200,000 yen	11.2	9.6	2.5	4.7	16.0	8.8	12.7	12.6	10.0	11.2
200,000-300,000 yen	9.9	13.0	2.5	6.7	10.1	15.2	13.5	14.2	11.7	14.8
300,000-500,000 yen	7.0	11.6	8.9	9.4	6.7	11.1	7.1	15.3	5.0	10.1
500,000-1,000,000 yen	5.2	6.3	2.5	3.4	4.2	7.6	5.6	5.8	10.0	8.3
1,000,000+ yen	1.0	1.9	0.0	0.7	0.0	1.2	1.6	2.1	3.3	3.6

\* “10,000-30,000 yen” still is the most popular answer for the purchase price of favorite watch owned.

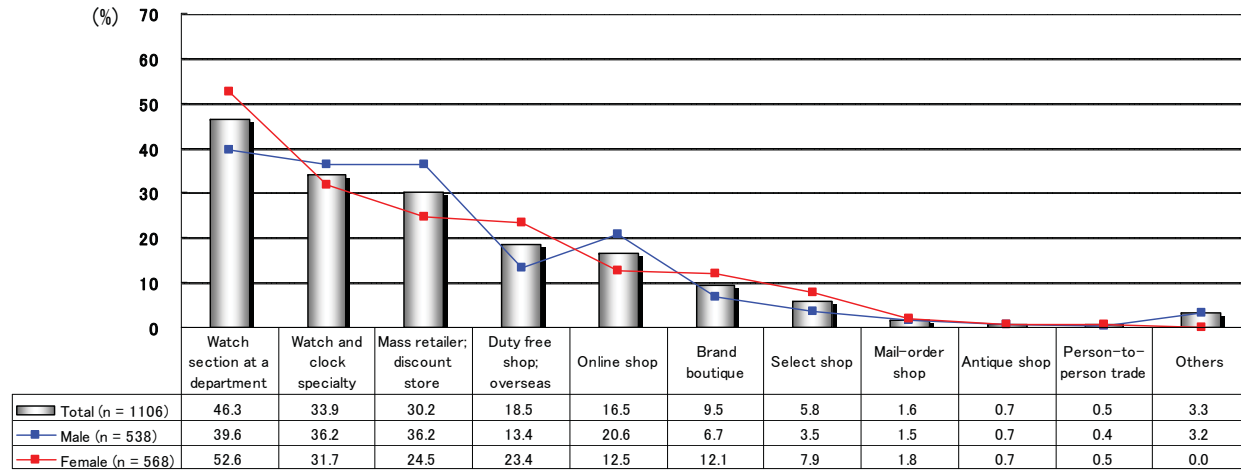
\* There are clusters in responses with “10,000-100,000 yen” and “300,000-500,000 yen” for male and “10,000-50,000 yen” and “200,000-300,000 yen” for female.

\* By age group, we found that both male and female in their 20s were concentrated in the range of “10,000-50,000 yen”; in their 30s have three clusters with “10,000-50,000 yen,” “100,000-150,000 yen” and “200,000-500,000 yen”; those in their 40s have a wide coverage from 10,000 to 500,000 yen; and those in their 50s were concentrated in “50,000-150,000 yen.”

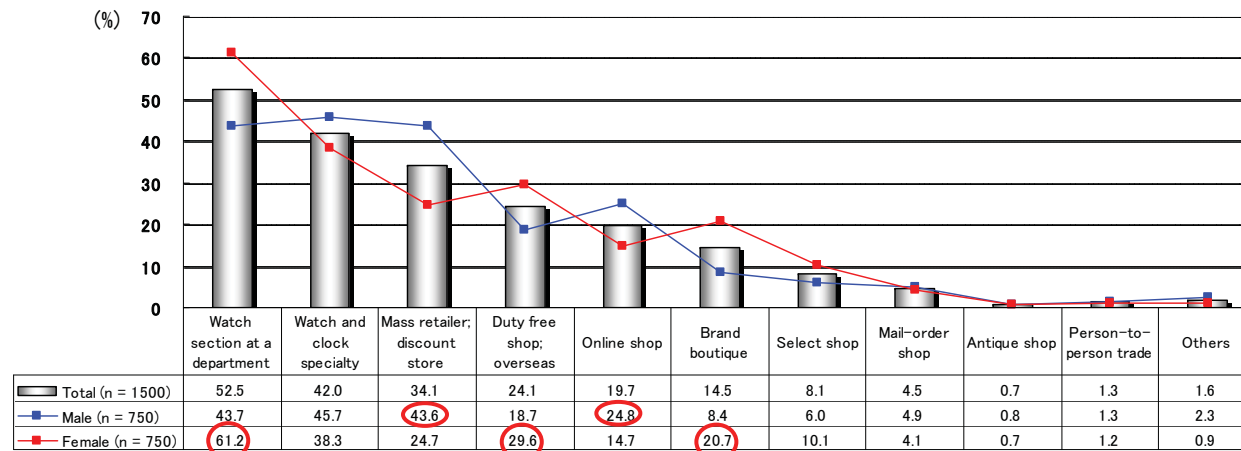
■ Location of purchase (all)



2008



2010



\* “Watch section of a department store” remains the most popular answer, and is especially popular among female.

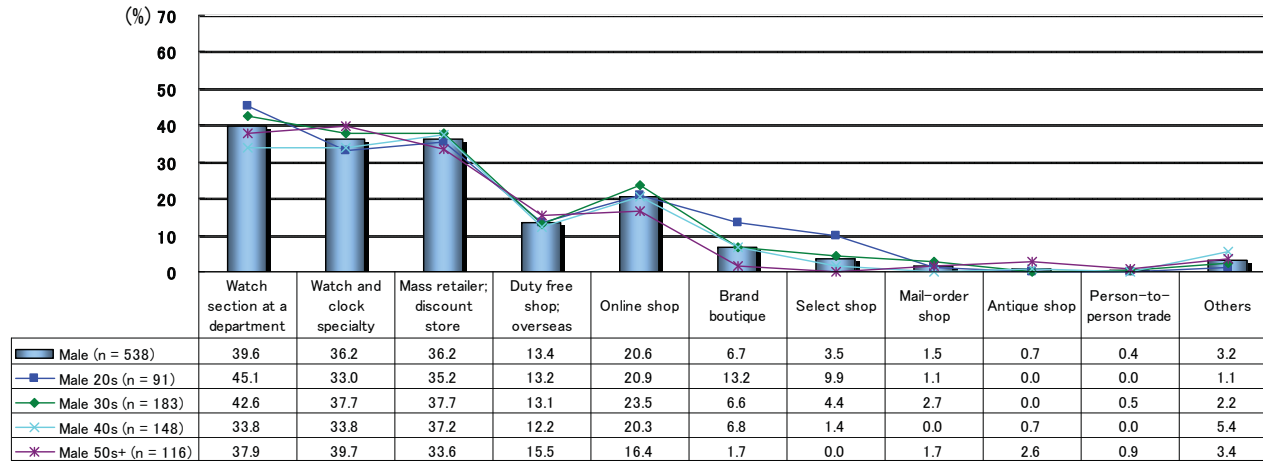
\* For male, “Watch and clock specialty store; jewelry store” was the top answer. In particular, the answers of “Mass retailers; discount stores” and “Internet” were popular among male.

\* On the other hand, for female, the answers of “Duty-free shops; overseas shops” and “Brand boutique” were popular.

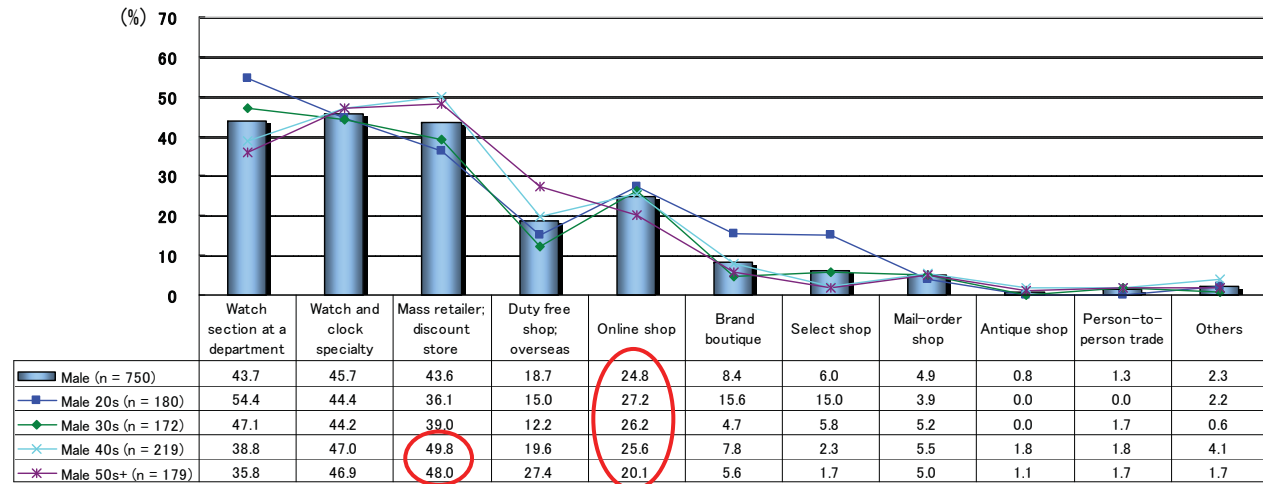
■ Location of purchase (male)



2008



2010



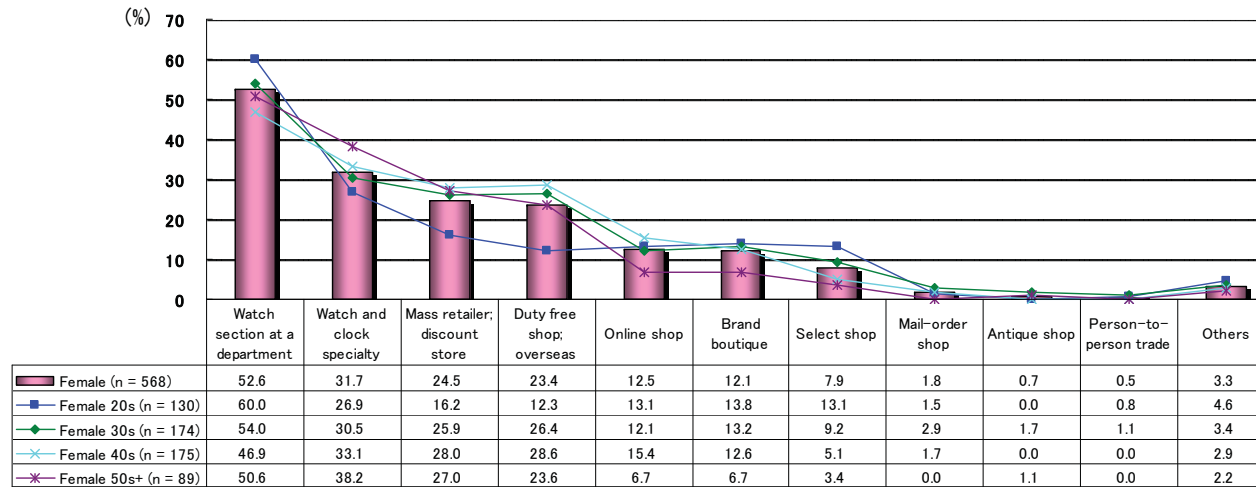
\* In 2010, the ratio of purchase at “Mass retailer; discount store” was high especially for those in their 40s and those aged 50+.

\* The answer of “Internet” was popular among those in their 20s through 40s. Even nearly 20% of those aged 50+ use it to purchase a watch.

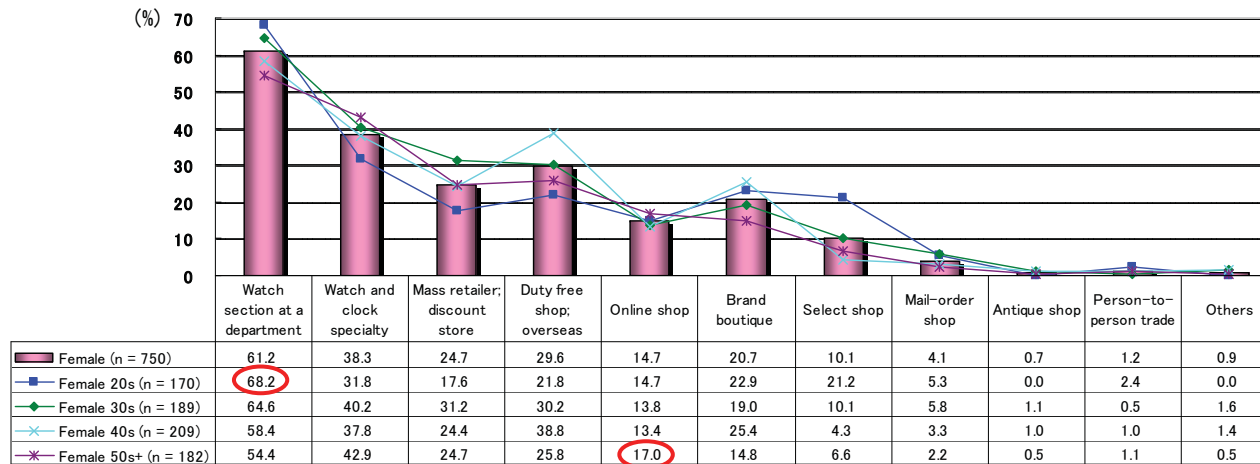
■ Location of purchase (female)



2008



2010



\* The answer of “Watch section at a department store” was still popular for female in their 20s.

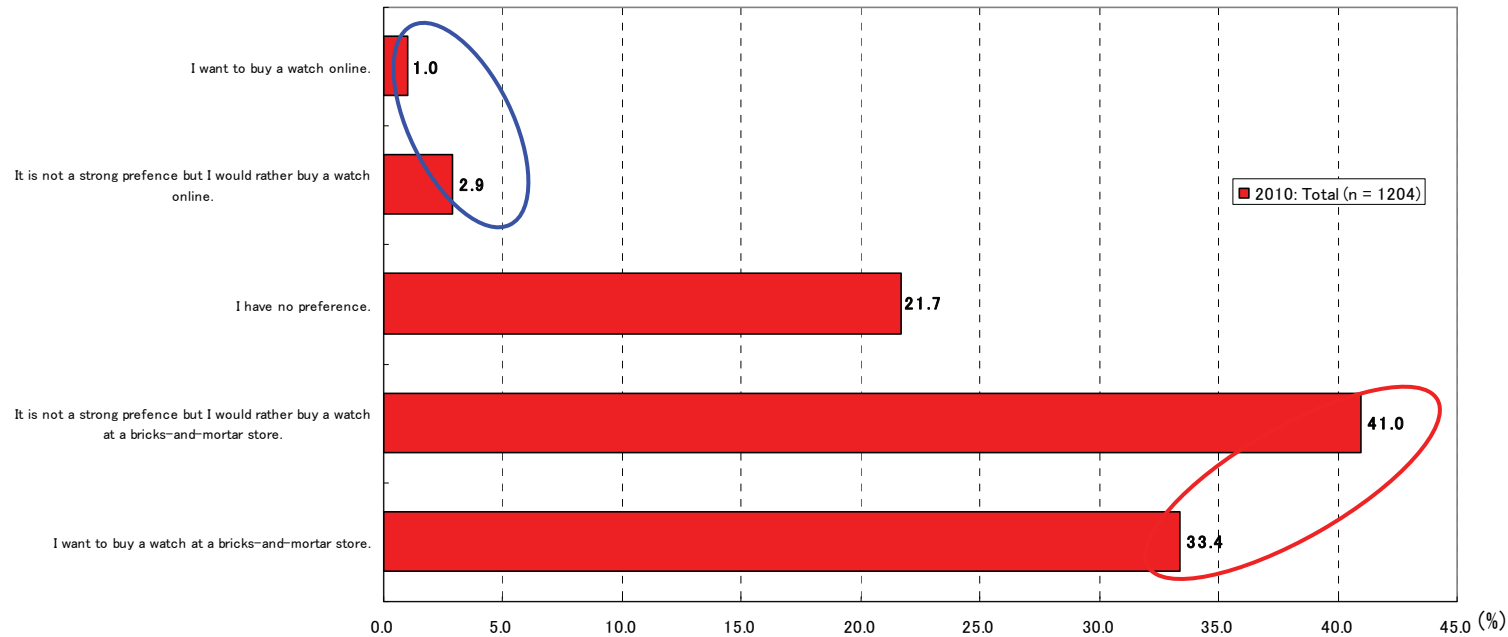
\* The answer of “Internet” increased by approximately 10 points for those aged 50+ compared with 2008. It seems to be used as a place to buy watches or as a tool even for senior people.

■ Willingness to purchase watches online



\*In the 2010 survey, we asked “those who have not purchased watches online” about their willingness to purchase online in the future.

2010



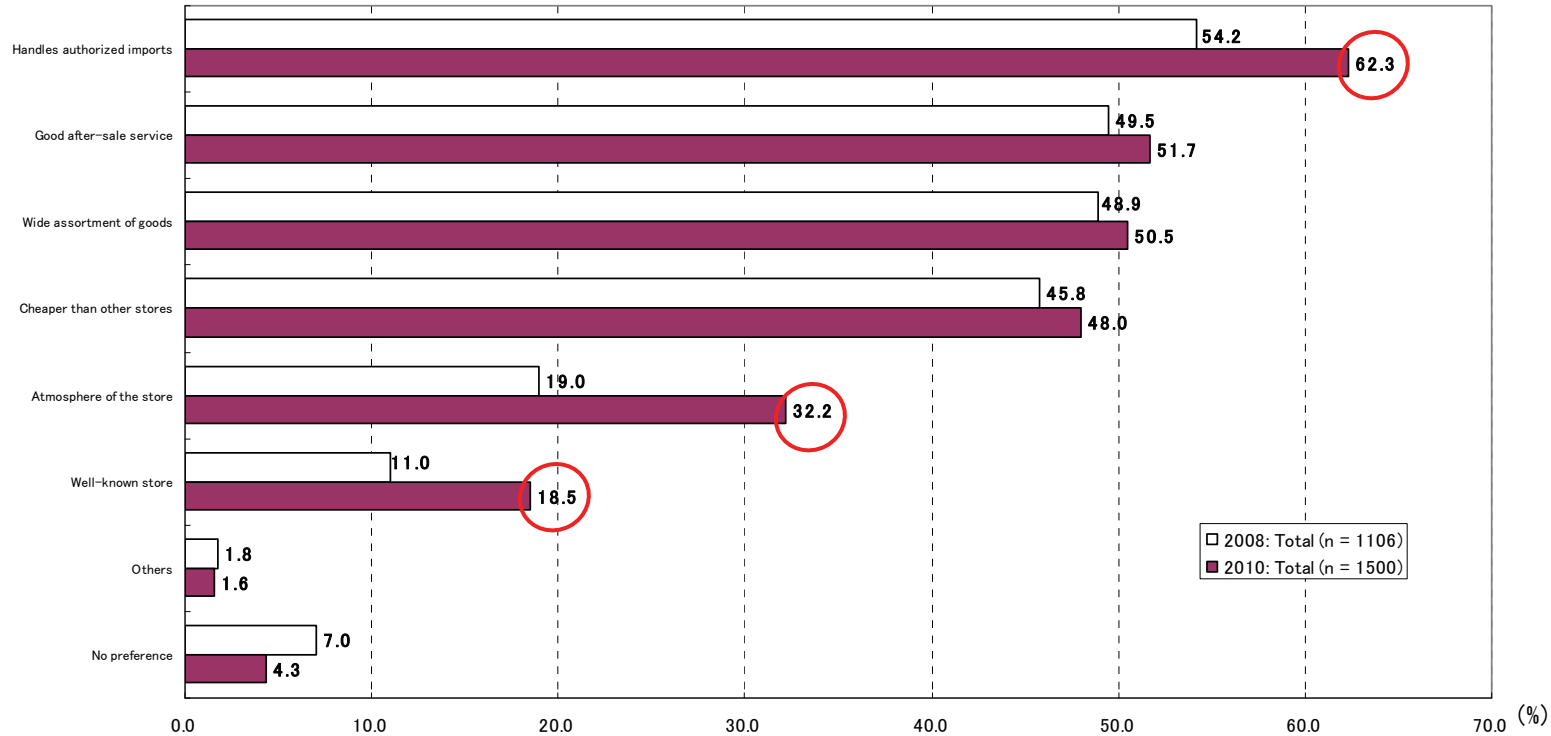
	Total male	Total female
	2010 (n = 564)	2010 (n = 640)
I want to buy a watch online.	1.2	0.8
It is not a strong preference but I would rather buy a watch online.	3.7	2.2
I have no preference.	25.5	18.3
It is not a strong preference but I would rather buy a watch at a bricks-and-mortar store.	39.4	42.5
I want to buy a watch at a bricks-and-mortar store.	30.1	36.3

\* Those who answered “I want to buy watches online” and “It is not a strong preference but I would rather buy watches online” made up only 3.9% of the total.

\* Even among male who are less uncomfortable with purchasing watches on the “Internet,” the majority of people who have not done online shopping preferred bricks-and-mortar stores.



■ Important factors in choosing a retailer



	All males		All females	
	2008 (n = 538)	2010 (n = 750)	2008 (n = 568)	2010 (n = 750)
Handles authorized imports	46.8	57.1	61.1	67.6
Good after-sale service	44.1	44.3	54.6	59.2
Wide assortment of goods	48.5	47.5	49.3	53.5
Cheaper than other stores	52.8	53.7	39.3	42.3
Atmosphere of the store	14.1	25.7	23.6	38.7
Well-known store	9.9	16.1	12.1	20.8
Others	1.5	1.6	2.1	1.6
No preference	7.4	5.6	6.5	2.9

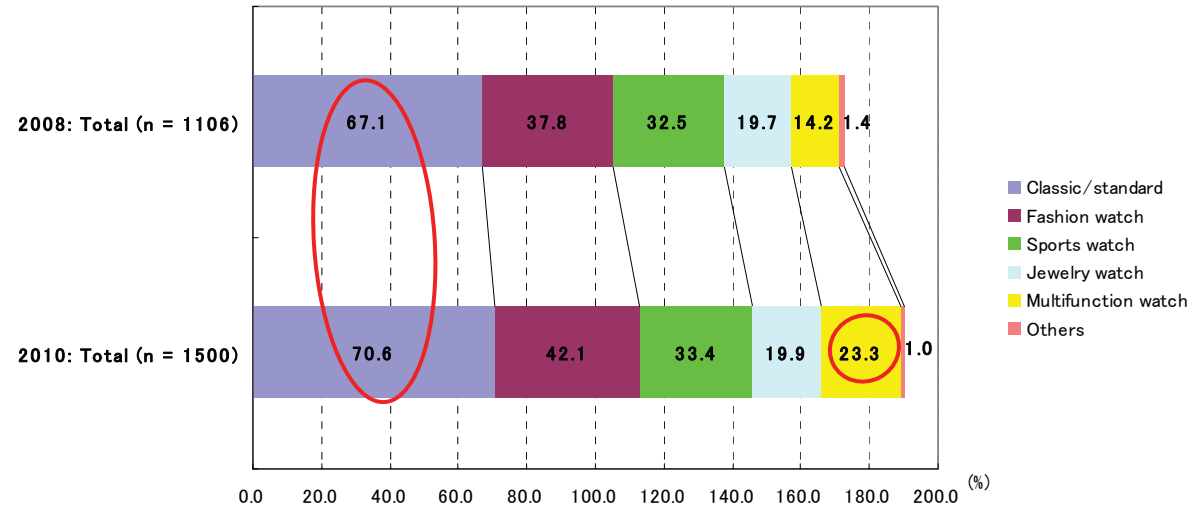
\* “Handles authorized imports” still was the most popular response, chosen by both male and female in the previous survey.

\* Compared with 2008, “Atmosphere of the store” and “Is a well-known store” became more popular answers. This appears to be because more female chose this response.

\* Also among female, the tendency to emphasize after-sale service is strong, showing female users’ “orientation toward security and safety.”

\* Male seem to place more importance on “Price.”

Favorite type of watch (all)



Favorite type of watch (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2008 (n = 538)	2010 (n = 750)	2008 (n = 91)	2010 (n = 180)	2008 (n = 183)	2010 (n = 172)	2008 (n = 148)	2010 (n = 219)	2008 (n = 116)	2010 (n = 179)
Classic/standard	69.7	71.3	65.9	74.4	68.3	74.4	68.9	67.1	75.9	70.4
Fashion watch	19.5	25.1	30.8	41.1	25.1	25.0	11.5	17.8	12.1	17.9
Sports watch	45.9	44.8	41.8	33.3	51.4	48.3	52.7	56.2	31.9	39.1
Jewelry watch	3.5	4.3	4.4	5.6	1.6	3.5	5.4	5.0	3.4	2.8
Multifunction watch	23.0	32.7	20.9	26.7	28.4	29.1	25.7	37.0	12.9	36.9
Others	1.3	1.3	2.2	0.6	1.1	2.3	0.7	0.5	1.7	2.2

Favorite type of watch (female)

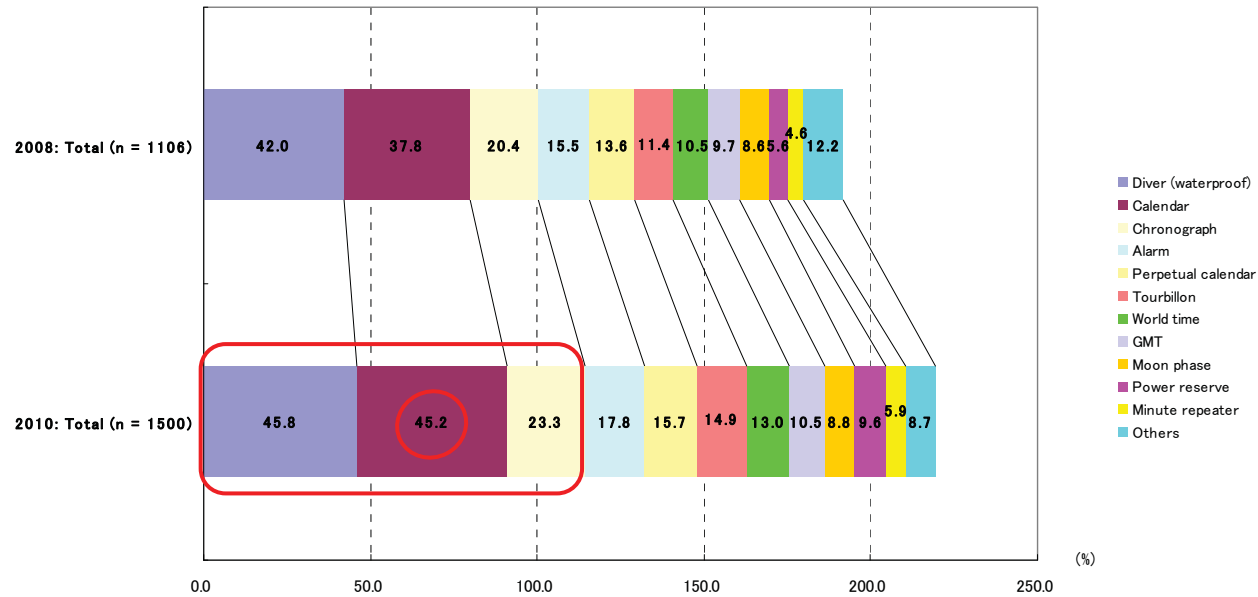
	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2008 (n = 568)	2010 (n = 750)	2008 (n = 130)	2010 (n = 170)	2008 (n = 174)	2010 (n = 189)	2008 (n = 175)	2010 (n = 209)	2008 (n = 89)	2010 (n = 182)
Classic/standard	64.6	69.9	58.5	72.9	67.2	70.9	64.0	73.2	69.7	62.1
Fashion watch	55.1	59.1	61.5	71.8	57.5	62.4	56.0	56.5	39.3	46.7
Sports watch	19.9	22.0	12.3	16.5	25.3	28.6	20.6	27.3	19.1	14.3
Jewelry watch	35.0	35.6	46.9	33.5	37.4	34.4	30.9	38.8	21.3	35.2
Multifunction watch	5.8	13.9	6.2	13.5	9.8	11.6	2.9	14.8	3.4	15.4
Others	1.4	0.7	0.0	0.6	2.3	0.5	1.1	1.0	2.2	0.5

“Classic/standard” remains the favorite type of watch, and male like “Sports watches” and “Multifunction watches” while female like “Fashion watches” and “Jewelry watches.”

\* The increase in those in their 40s and aged 50+ who answered "Multifunction watch" was particularly high.

\* While “Fashion watch” is popular with especially the young generation; male in their 20s mostly favor it while female like it over a wide range of ages, in their 20s through 40s.

Favorite function of watch (all)



Favorite function of watch (male)

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2008 (n = 538)	2010 (n = 750)	2008 (n = 91)	2010 (n = 180)	2008 (n = 183)	2010 (n = 172)	2008 (n = 148)	2010 (n = 219)	2008 (n = 116)	2010 (n = 179)
Diver (waterproof)	52.6	51.7	47.3	49.4	60.7	43.0	58.8	65.3	36.2	45.8
Calendar	43.9	55.1	37.4	45.0	42.6	51.7	45.9	58.9	48.3	63.7
Chronograph	30.9	35.1	36.3	33.9	29.5	40.1	35.1	39.7	23.3	25.7
Alarm	18.4	20.1	24.2	18.9	21.3	20.9	13.5	18.3	15.5	22.9
Perpetual calendar	16.9	20.5	16.5	18.3	15.3	17.4	17.6	21.5	19.0	24.6
Tourbillon	8.9	13.3	9.9	18.3	11.5	9.9	8.1	12.8	5.2	12.3
World time	11.3	13.5	15.4	20.0	13.1	9.9	7.4	11.9	10.3	12.3
GMT	10.6	12.9	8.8	11.7	11.5	11.0	13.5	16.4	6.9	11.7
Moon phase	6.9	8.7	6.6	9.4	10.4	7.6	4.7	10.0	4.3	7.3
Power reserve	6.9	13.6	5.5	12.8	9.3	18.0	8.8	12.8	1.7	11.2
Minute repeater	6.3	6.3	3.3	3.9	7.7	4.1	6.8	9.1	6.0	7.3
Others	8.4	6.3	5.5	3.3	4.4	5.2	12.2	5.5	12.1	11.2

Favorite function of watch (female)

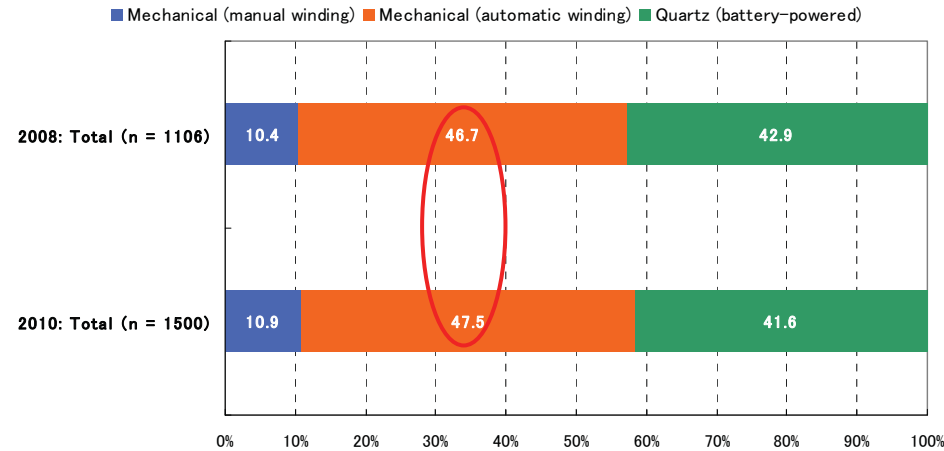
	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2008 (n = 568)	2010 (n = 750)	2008 (n = 130)	2010 (n = 170)	2008 (n = 174)	2010 (n = 189)	2008 (n = 175)	2010 (n = 209)	2008 (n = 89)	2010 (n = 182)
Diver (waterproof)	32.0	39.9	36.9	41.2	32.8	41.8	28.6	45.9	30.3	29.7
Calendar	32.0	35.3	29.2	38.2	37.4	38.6	28.0	33.5	33.7	31.3
Chronograph	10.6	11.5	11.5	12.4	17.2	15.3	6.3	11.0	4.5	7.1
Alarm	12.7	15.5	7.7	15.3	17.8	13.8	9.7	17.7	15.7	14.8
Perpetual calendar	10.4	10.8	11.5	10.6	8.6	9.5	9.1	11.0	14.6	12.1
Tourbillon	13.7	16.4	17.7	18.2	10.3	14.8	14.3	15.3	13.5	17.6
World time	9.7	12.5	11.5	17.6	8.6	10.1	12.0	11.0	4.5	12.1
GMT	8.8	8.0	6.2	8.2	6.3	10.1	12.6	6.7	10.1	7.1
Moon phase	10.2	8.9	12.3	8.8	11.5	9.0	11.4	11.0	2.2	6.6
Power reserve	4.4	5.6	3.1	5.9	5.2	4.8	5.1	3.3	3.4	8.8
Minute repeater	3.0	5.6	0.0	2.4	2.9	6.9	5.7	6.9	2.2	6.0
Others	15.8	11.1	10.8	9.4	12.6	6.9	20.6	12.9	20.2	14.8

\* "Diver (waterproof)," "Calendar" and "Chronograph" ranked high as the favorite function of the watch as in 2008.

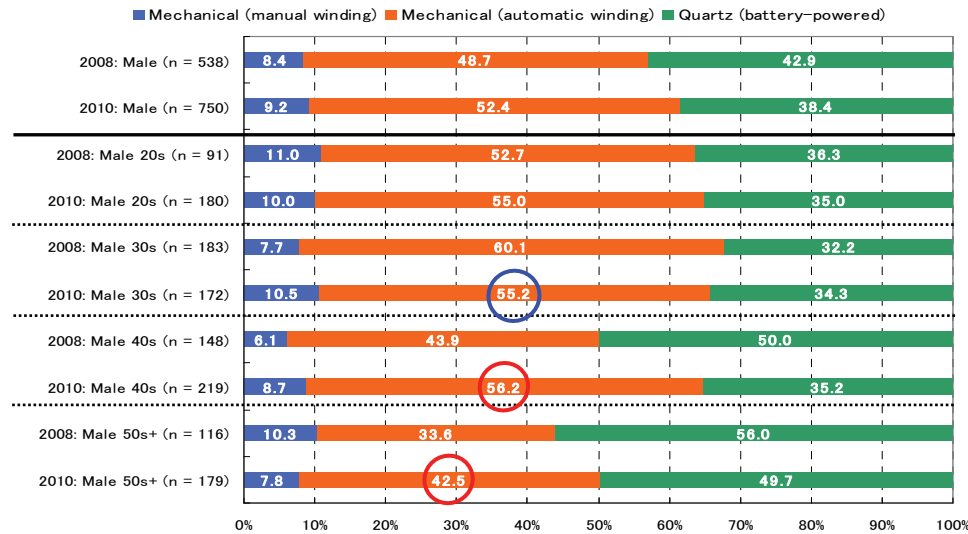
\* In 2010 especially "Calendar" function rose by +7.4 points compared with 2008.

\* Male still showed a "Preference for wide range of functionality." Female also favored "Diver (waterproof)" and "Calendar."

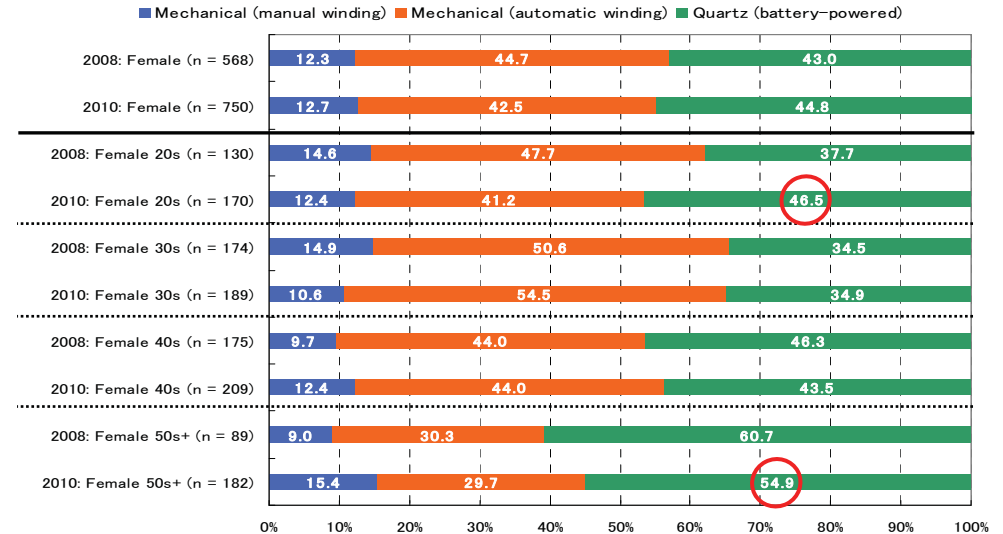
Favorite movement of watch (drive system): all



Favorite movement of watch (drive system): male



Favorite movement of watch (drive system): female



\* Overall, "Mechanical (automatic winding)" remained the dominant answer.

\* The proportion of those answering "Mechanical (automatic winding)" rose among male in their 40s and aged 50+. On the other hand, there was some tendency to "move away from Mechanical" among those in their 30s.

\* Among female, the proportion of "Quartz (battery powered)" was high for those aged 50+. The popularity of "Quartz (battery powered)" rose among female in their 20s.

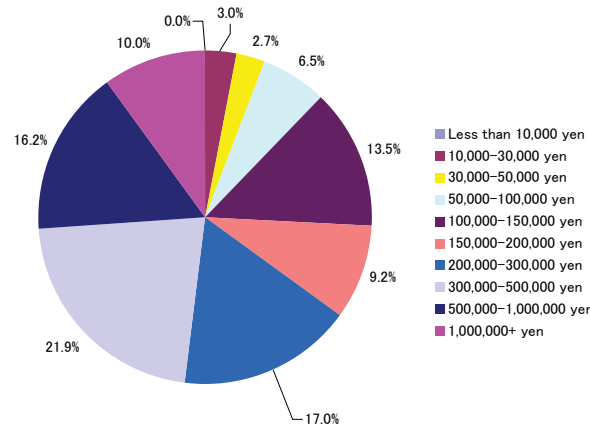
\* We can see that "middle-age and senior male emphasize machines (mechanical)," "senior female emphasize practicality" and "young female put importance on fashionableness" among other trends.

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

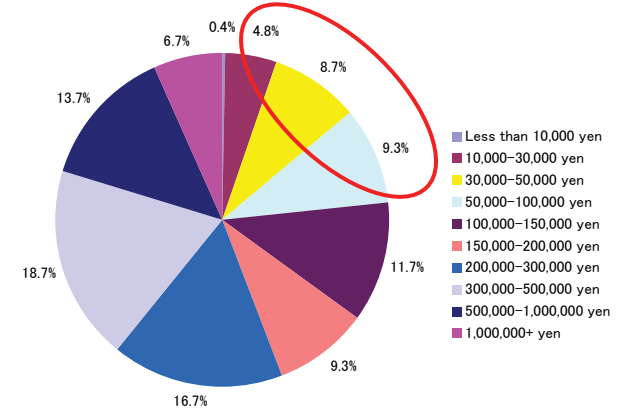
\*In the 2010 survey, the list was created based on the “purchase price of the watch you want the most” out of all watches.



2008 price range of watch you want to buy: Total (n = 401)



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



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

	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2008 (n = 201)	2010 (n = 544)	2008 (n = 20)	2010 (n = 142)	2008 (n = 73)	2010 (n = 130)	2008 (n = 59)	2010 (n = 152)	2008 (n = 49)	2010 (n = 120)
Less than 10,000 yen	0.0	0.4	0.0	0.7	0.0	0.0	0.0	0.7	0.0	0.0
10,000-30,000 yen	2.5	5.1	0.0	4.9	1.4	6.2	3.4	5.3	4.1	4.2
30,000-50,000 yen	1.5	7.9	0.0	12.7	0.0	5.4	3.4	6.6	2.0	6.7
50,000-100,000 yen	7.0	9.0	5.0	10.6	9.6	9.2	10.2	7.2	0.0	9.2
100,000-150,000 yen	15.9	12.7	20.0	12.7	9.6	16.9	18.6	8.6	20.4	13.3
150,000-200,000 yen	9.0	9.0	15.0	12.7	9.6	9.2	5.1	7.2	10.2	6.7
200,000-300,000 yen	15.9	16.2	20.0	13.4	17.8	15.4	10.2	23.7	18.4	10.8
300,000-500,000 yen	16.4	18.0	10.0	10.6	23.3	20.8	15.3	19.1	10.2	22.5
500,000-1,000,000 yen	17.9	13.8	15.0	15.5	19.2	11.5	11.9	12.5	24.5	15.8
1,000,000+ yen	13.9	7.9	15.0	6.3	9.6	5.4	22.0	9.2	10.2	10.8

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

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2008 (n = 200)	2010 (n = 496)	2008 (n = 34)	2010 (n = 127)	2008 (n = 62)	2010 (n = 127)	2008 (n = 74)	2010 (n = 140)	2008 (n = 30)	2010 (n = 102)
Less than 10,000 yen	0.0	0.4	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0
10,000-30,000 yen	3.5	4.4	5.9	11.8	0.0	2.4	6.8	2.1	0.0	1.0
30,000-50,000 yen	4.0	9.5	2.9	18.1	3.2	7.1	4.1	6.4	6.7	5.9
50,000-100,000 yen	6.0	9.7	20.6	11.8	4.8	11.0	0.0	5.0	6.7	11.8
100,000-150,000 yen	11.0	10.7	11.8	9.4	6.5	7.1	12.2	14.3	16.7	11.8
150,000-200,000 yen	9.5	9.7	2.9	5.5	11.3	11.8	6.8	12.9	20.0	7.8
200,000-300,000 yen	18.0	17.3	14.7	8.7	17.7	17.3	23.0	20.0	10.0	24.5
300,000-500,000 yen	27.5	19.4	20.6	18.9	33.9	23.6	27.0	18.6	23.3	15.7
500,000-1,000,000 yen	14.5	13.5	14.7	9.4	16.1	14.2	14.9	16.4	10.0	13.7
1,000,000+ yen	6.0	5.4	5.9	4.7	6.5	5.5	5.4	4.3	6.7	7.8

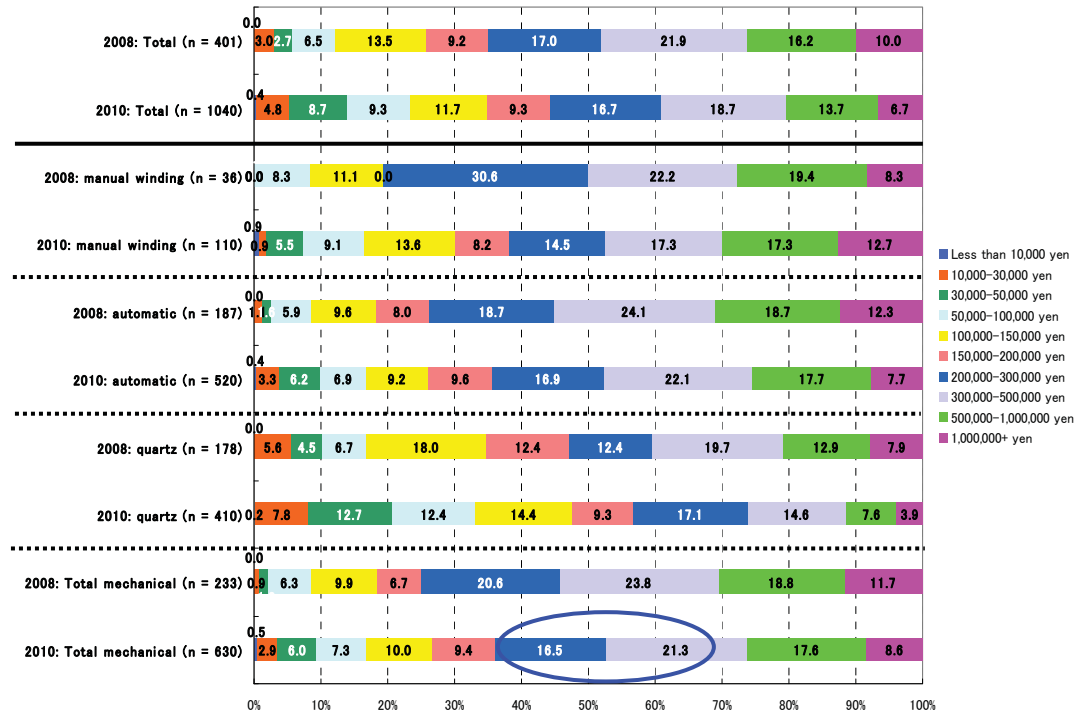
\* The price range of “10,000-100,000 yen” increased in popularity as the price range of watches consumers want to buy. It was most conspicuous among male and female in their 20s.

\* Overall the “lowering of purchase price” is desirable. However, the answer of “300,000-500,000 yen” was most popular for both male and female, followed by “200,000-300,000 yen.”

These are estimated to be the price ranges of “reasonable luxury watches” and the “watch that a user wants to buy” who is interested in watches over 100,000 yen.

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

\*In the 2010 survey, 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	
	2008 (n = 201)	2010 (n = 544)	2008 (n = 45)	2010 (n = 50)	2008 (n = 262)	2010 (n = 300)	2008 (n = 59)	2010 (n = 194)	2008 (n = 49)	2010 (n = 350)
Less than 10,000 yen	0.0	0.4	0.0	0.0	0.0	0.3	0.0	0.5	0.0	0.3
10,000-30,000 yen	2.5	5.1	0.0	0.0	0.0	2.0	6.2	11.3	0.0	1.7
30,000-50,000 yen	1.5	7.9	0.0	6.0	0.9	5.0	2.5	12.9	0.8	5.1
50,000-100,000 yen	7.0	9.0	7.7	8.0	5.6	7.3	8.6	11.9	5.8	7.4
100,000-150,000 yen	15.9	12.7	7.7	20.0	11.2	9.7	23.5	15.5	10.8	11.1
150,000-200,000 yen	9.0	9.0	0.0	6.0	9.3	10.7	9.9	7.2	8.3	10.0
200,000-300,000 yen	15.9	16.2	46.2	18.0	17.8	17.3	8.6	13.9	20.8	17.4
300,000-500,000 yen	16.4	18.0	0.0	16.0	18.7	21.0	16.0	13.9	16.7	20.3
500,000-1,000,000 yen	17.9	13.8	30.8	12.0	20.6	17.7	12.3	8.2	21.7	16.9
1,000,000+ yen	13.9	7.9	7.7	14.0	15.9	9.0	12.3	4.6	15.0	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	
	2008 (n = 200)	2010 (n = 496)	2008 (n = 70)	2010 (n = 60)	2008 (n = 254)	2010 (n = 220)	2008 (n = 244)	2010 (n = 216)	2008 (n = 324)	2010 (n = 280)
Less than 10,000 yen	0.0	0.4	0.0	1.7	0.0	0.5	0.0	0.0	0.0	0.7
10,000-30,000 yen	3.5	4.4	0.0	1.7	2.5	5.0	5.2	4.6	1.9	4.3
30,000-50,000 yen	4.0	9.5	0.0	5.0	2.5	7.7	6.2	12.5	1.9	7.1
50,000-100,000 yen	6.0	9.7	8.7	10.0	6.3	6.4	5.2	13.0	6.8	7.1
100,000-150,000 yen	11.0	10.7	13.0	8.3	7.5	8.6	13.4	13.4	8.7	8.6
150,000-200,000 yen	9.5	9.7	0.0	10.0	6.3	8.2	14.4	11.1	4.9	8.6
200,000-300,000 yen	18.0	17.3	21.7	11.7	20.0	16.4	15.5	19.9	20.4	15.4
300,000-500,000 yen	27.5	19.4	34.8	18.3	31.3	23.6	22.7	15.3	32.0	22.5
500,000-1,000,000 yen	14.5	13.5	13.0	21.7	16.3	17.7	13.4	6.9	15.5	18.6
1,000,000+ yen	6.0	5.4	8.7	11.7	7.5	5.9	4.1	3.2	7.8	7.1

\* While those answering “200,000-500,000 yen” accounted for slightly less than 40% of the total in “Total Mechanical” in 2010, it has slightly decreased.

\* A “shift toward lower price ranges” was seen in each movement; especially the lowering of price for “Quartz” was significant for both male and female.

■ Brand of watch you want (ranking comparison 2008-2010)



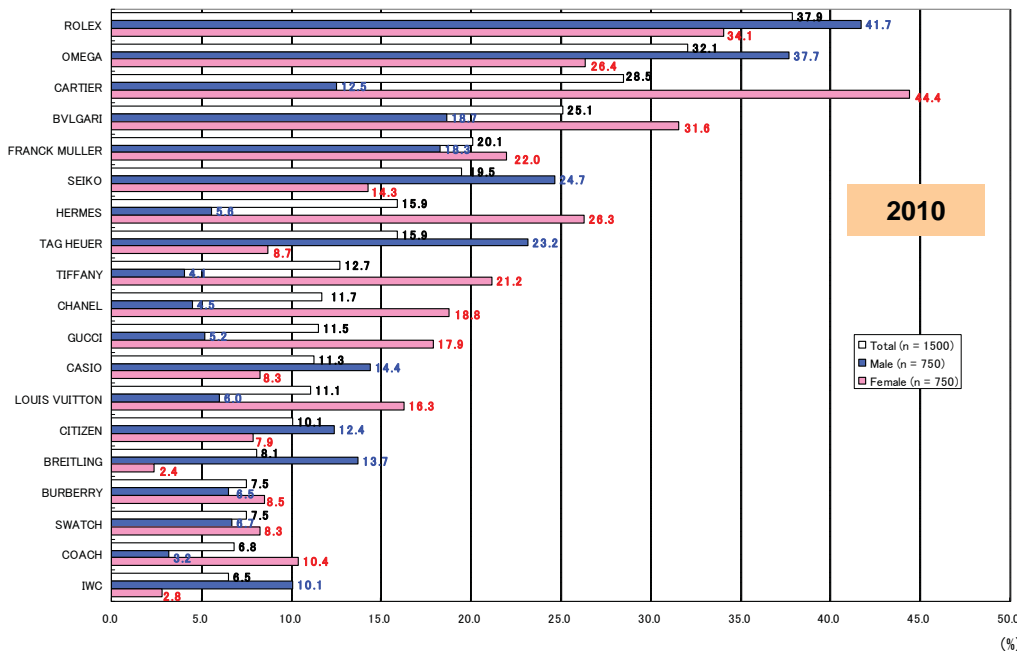
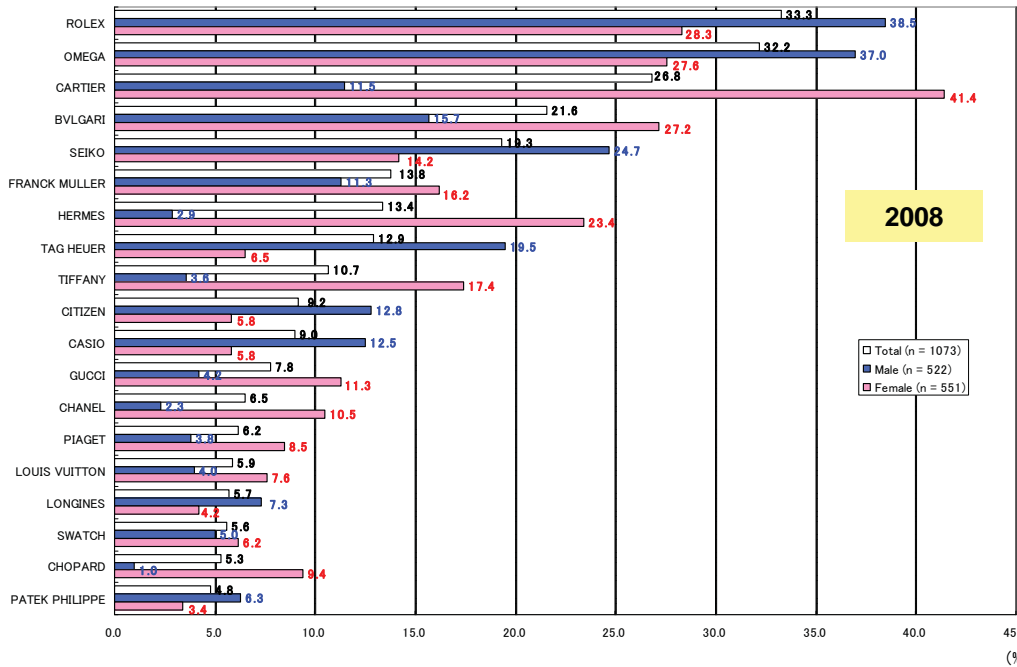
2008			2010				
Order	Brand	Total n = 1073		Order	Brand	Total n = 1500	
1	ROLEX	33.3	→	1	ROLEX	37.9	
2	OMEGA	32.2	→	2	OMEGA	32.1	
3	CARTIER	26.8	→	3	CARTIER	28.5	
4	BVLGARI	21.6	→	4	BVLGARI	25.1	
5	SEIKO	19.3	↘ To 6th place	5	FRANCK MULLER	20.1	
6	FRANCK MULLER	13.8	↗ To 5th place	6	SEIKO	19.5	
7	HERMES	13.4	→	7	HERMES	15.9	
8	TAG HEUER	12.9	→	8	TAG HEUER	15.9	
9	TIFFANY	10.7	→	9	TIFFANY	12.7	
10	CITIZEN	9.2	↘ To 14th place	10	CHANEL	11.7	
11	CASIO	9.0	↘ To 12th place	11	GUCCI	11.5	
12	GUCCI	7.8	↗ To 11th place	12	CASIO	11.3	
13	CHANEL	6.5	↗ To 10th place	13	LOUIS VUITTON	11.1	
14	PIAGET	6.2	↘ To 23rd place	14	CITIZEN	10.1	
15	LOUIS VUITTON	5.9	↗ To 13th place	15	BREITLING	8.1	
16	LONGINES	5.7	-	16	BURBERRY	7.5	Ranked in
17	SWATCH	5.6	→	17	SWATCH	7.5	
18	CHOPARD	5.3	↘ To 20th place	18	COACH	6.8	
19	PATEK PHILIPPE	4.8	↘ To 27th place	19	IWC	6.5	
20	BREGUET	4.3	-	20	CHOPARD	6.1	
21	IWC	4.1	↗ To 19th place	21	agnes b.	5.9	Ranked in
22	BREITLING	3.9	↗ To 15th place	22	HARRY WINSTON	5.7	
23	HARRY WINSTON	3.7	↗ To 22nd place	23	PIAGET	5.7	
24	CHAUMET	3.4	-	24	FOLLI FOLLIE	5.6	Ranked in
25	COACH	3.4	↗ To 18th place	25	DIOR	5.5	
26	DIOR	3.4	↗ To 25th place	26	AUDEMARS PIGUET	5.0	Ranked in
27	PANERAI	3.4	-	27	PATEK PHILIPPE	4.5	Ranked out

\* With the top four brands of "ROLEX," "OMEGA," "CARTIER" and "BVLGARI", there was no change in ranking down to the 9th place.

\* The brands that rose in the rankings were "BREITLING": +7 notches and "COACH": +7 notches.

\* In 2010, replacing "LONGINES," "BREGUET," "CHAUMET," and "PANERAI," reasonably priced fashion watches of "BURBERRY," "agnes b." and "FOLLI FOLLIE" and "AUDEMARS PIGUET" ranked in for the first time.

■ Brand of the watch you want (by sex)



• Both male and female had a high demand for “ROLEX” and “OMEGA” as the brand of watch they want.

\* Top 5 watch brands that male want in 2010

- 1st: “ROLEX” 41.7% (+3.2 points compared with 2008)
- 2nd: “OMEGA” 37.7% (+0.7 point)
- 3rd: “SEIKO” 24.7% (±0 point)
- 4th: “TAG HEUER” 23.2% (+3.7 points)
- 5th: “BVLGARI” 18.7% (+3.0 points)

• In addition, “BREITLING” and “IWC” were the “brands that ranked in for the first time” in 2010 out of the brands with high response rate by male.

\* Top 5 watch brands that female want in 2010

- 1st: “CARTIER” 44.4% (+3.0 points compared with 2008)
- 2nd: “ROLEX” 34.1% (+5.8 points)
- 3rd: “BVLGARI” 31.6% (+4.4 points)
- 4th: “OMEGA” 26.4% (-1.2 points)
- 5th: “HERMES” 26.3% (+2.9 points)

\* In addition, the following three brands rose sharply from 2008 out of those with a high response rate by female.

- 1) “LOUIS VUITTON” 16.3% (+8.7 points compared with 2008)
- 2) “CHANEL” 18.8% (+8.3 points)
- 3) “GUCCI” 17.9% (+6.6 points)

\* In addition to standard brands, it appears that male have a high demand for a “luxury mechanical sports watch” that has high cost performance, and female for a “luxury fashion brand watch” as they did before.



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



2008

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	1073	522	89	178	143	112	551	128	170	168	85
ROLEX	33.3	38.5	29.2	37.1	46.9	37.5	28.3	25.0	28.8	29.8	29.4
OMEGA	32.2	37.0	46.1	39.9	30.8	33.0	27.6	29.7	28.8	27.4	22.4
CARTIER	26.8	11.5	6.7	10.7	13.3	14.3	41.4	44.5	51.8	36.9	24.7
BVLGARI	21.6	15.7	18.0	14.6	17.5	13.4	27.2	30.5	29.4	28.6	15.3
SEIKO	19.3	24.7	15.7	20.8	28.7	33.0	14.2	14.8	6.5	14.9	27.1
FRANCK MULLER	13.8	11.3	11.2	11.2	16.8	4.5	16.2	21.9	21.8	10.1	8.2
HERMES	13.4	2.9	0.0	3.4	2.1	5.4	23.4	25.8	21.2	24.4	22.4
TAG HEUER	12.9	19.5	12.4	21.9	25.2	14.3	6.5	4.7	7.6	8.3	3.5
TIFFANY	10.7	3.6	2.2	2.2	7.0	2.7	17.4	20.3	18.2	12.5	21.2
CITIZEN	9.2	12.8	9.0	13.5	11.9	16.1	5.8	7.8	4.7	4.2	8.2
CASIO	9.0	12.5	10.1	18.0	12.6	5.4	5.8	8.6	6.5	4.8	2.4
GUCCI	7.8	4.2	6.7	4.5	3.5	2.7	11.3	16.4	12.4	6.5	10.6
CHANEL	6.5	2.3	1.1	3.4	2.1	1.8	10.5	11.7	10.6	10.1	9.4
PIAGET	6.2	3.8	2.2	2.2	7.0	3.6	8.5	6.3	9.4	7.1	12.9
LOUIS VUITTON	5.9	4.0	5.6	3.9	5.6	0.9	7.6	8.6	9.4	7.1	3.5
LONGINES	5.7	7.3	1.1	6.2	11.2	8.9	4.2	2.3	5.9	3.0	5.9
SWATCH	5.6	5.0	7.9	5.6	5.6	0.9	6.2	8.6	8.2	4.8	1.2
CHOPARD	5.3	1.0	0.0	0.6	2.1	0.9	9.4	7.0	10.0	11.9	7.1
PATEK PHILIPPE	4.8	6.3	2.2	3.9	8.4	10.7	3.4	0.8	3.5	3.6	7.1
BREGUET	4.3	5.0	2.2	6.7	5.6	3.6	3.6	1.6	6.5	4.2	0.0
IWC	4.1	5.4	1.1	6.2	7.7	4.5	2.9	0.8	7.1	1.8	0.0
BREITLING	3.9	5.7	2.2	6.2	7.0	6.3	2.2	1.6	2.9	3.0	0.0
HARRY WINSTON	3.7	0.8	1.1	0.6	1.4	0.0	6.5	3.9	8.2	8.9	2.4
CHAUMET	3.4	0.2	0.0	0.0	0.7	0.0	6.4	7.8	5.9	7.7	2.4
COACH	3.4	1.3	4.5	0.6	0.7	0.9	5.3	9.4	4.1	4.2	3.5
DIOR	3.4	1.3	2.2	1.7	1.4	0.0	5.3	8.6	4.7	3.0	5.9
PANERAI	3.4	4.4	1.1	7.3	4.9	1.8	2.4	2.3	2.9	2.4	1.2

(Numbers are percentages)

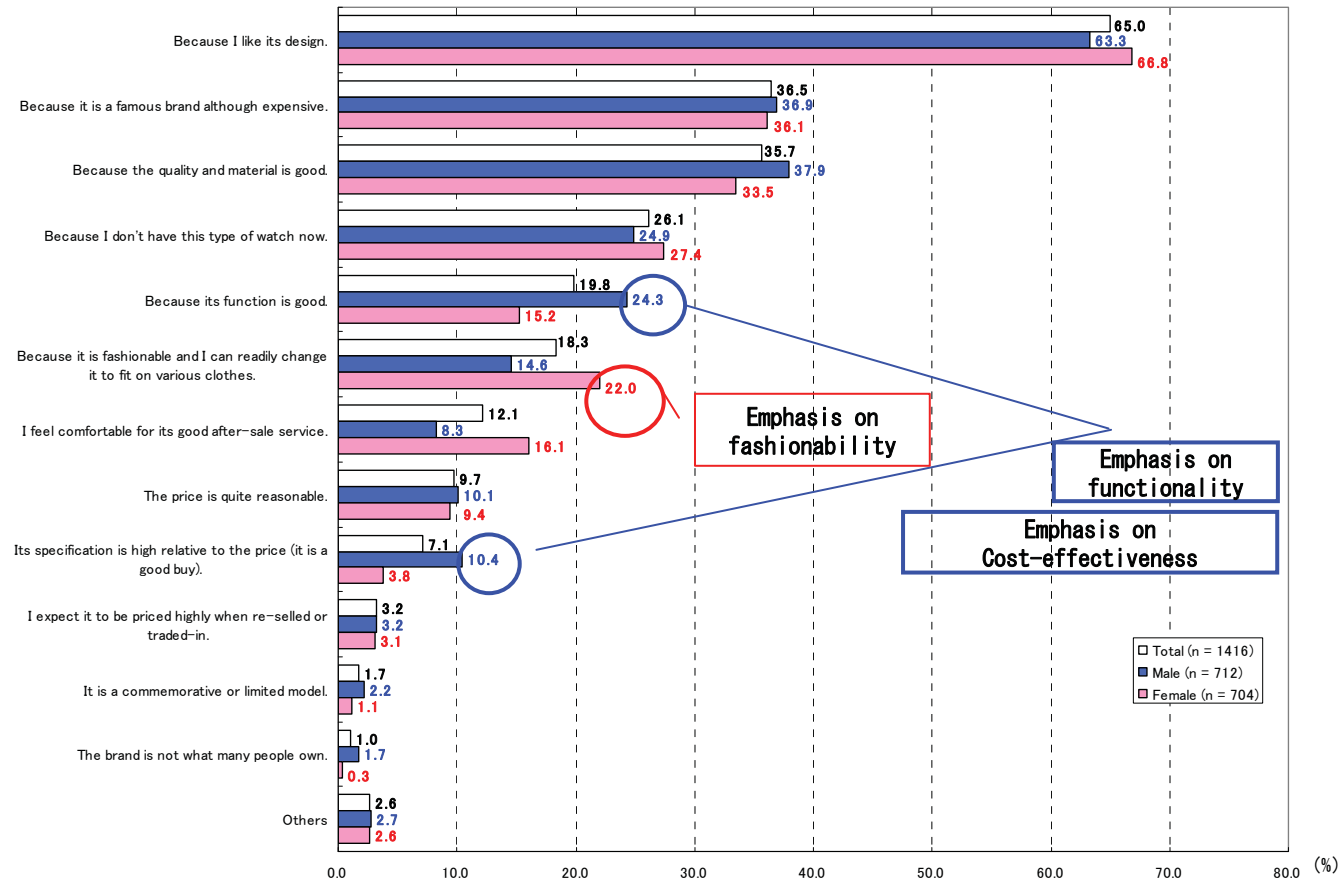
2010

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)

Reason for preferring specific brand

2010



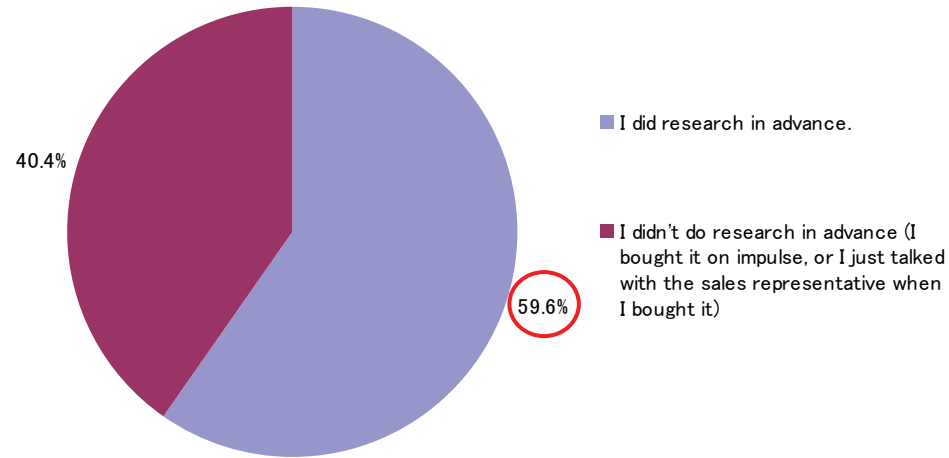
\* The top reason for preferring specific brand was "Good design," followed by "Expensive but famous brand" and "Good quality and material."

\* While male placed "Emphasis on functions" and "Emphasis on cost performance," female showed high awareness as "one of the personal fashion items."

\* In addition, those answering that they had "Comfortable for its good after-sale service" seemed to be slightly higher among female.

■ Research before purchasing a watch (all)

2010: Total (n = 1500)



■ Research before purchasing a watch (male)

2010

	Total male (n = 750)	Male 20s (n = 180)	Male 30s (n = 172)	Male 40s (n = 219)	Male 50s+ (n = 179)
I did research in advance.	64.7	58.9	68.6	68.5	62.0
I didn't do research in advance (I bought it on impulse, or I just talked with the sales representative when I bought it)	35.3	41.1	31.4	31.5	38.0

■ Research before purchasing a watch (female)

2010

	Total female (n = 750)	Female 20s (n = 170)	Female 30s (n = 189)	Female 40s (n = 209)	Female 50s+ (n = 182)
I did research in advance.	54.5	52.4	61.9	59.3	43.4
I didn't do research in advance (I bought it on impulse, or I just talked with the sales representative when I bought it)	45.5	47.6	38.1	40.7	56.6

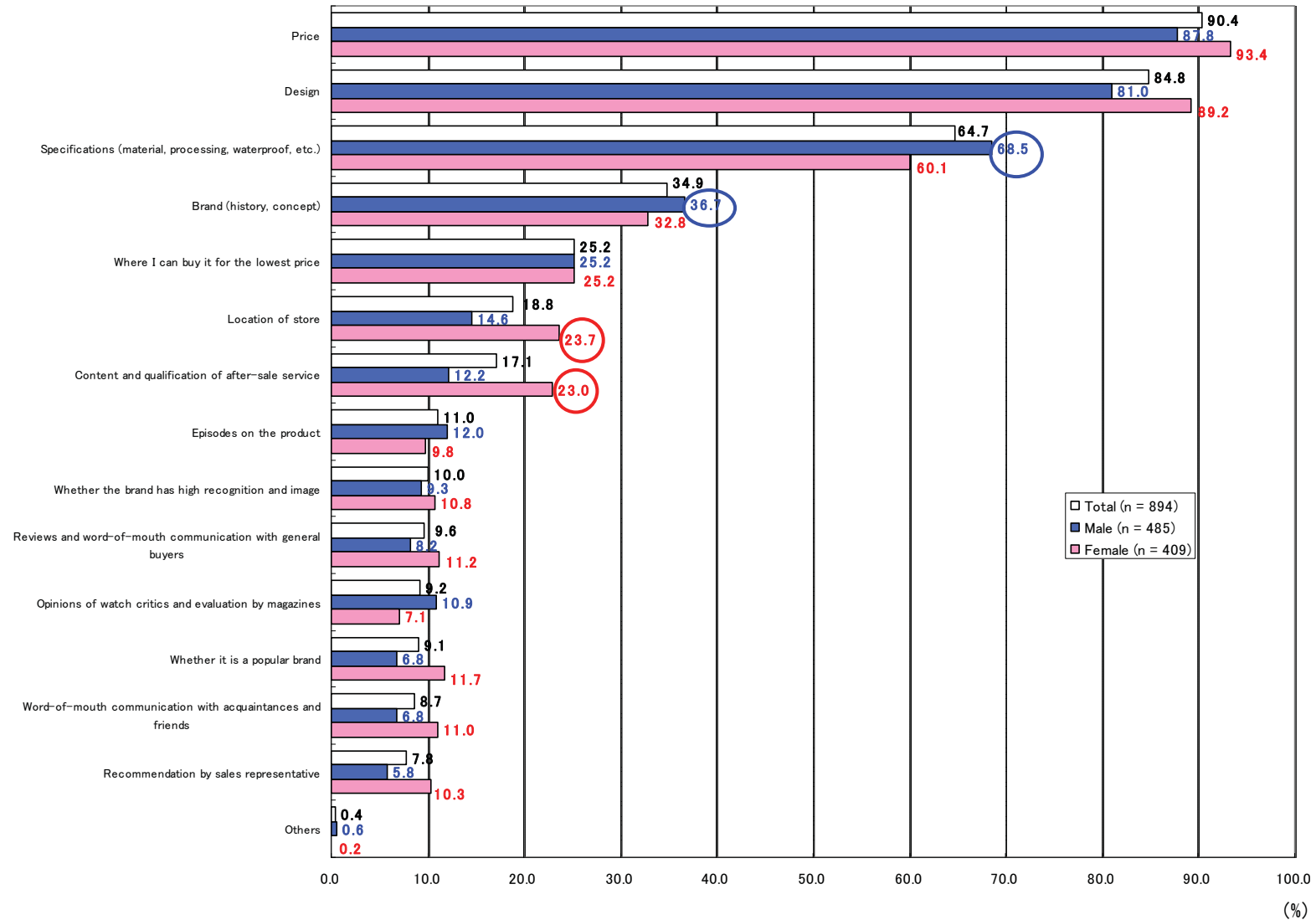
\* Of all respondents, 60% said that they “did research in advance” before buying a watch.

\* Comparing male and female, male showed a higher tendency to do such research, especially those in their 30s and 40s.

■ Kind of research done in advance



2010

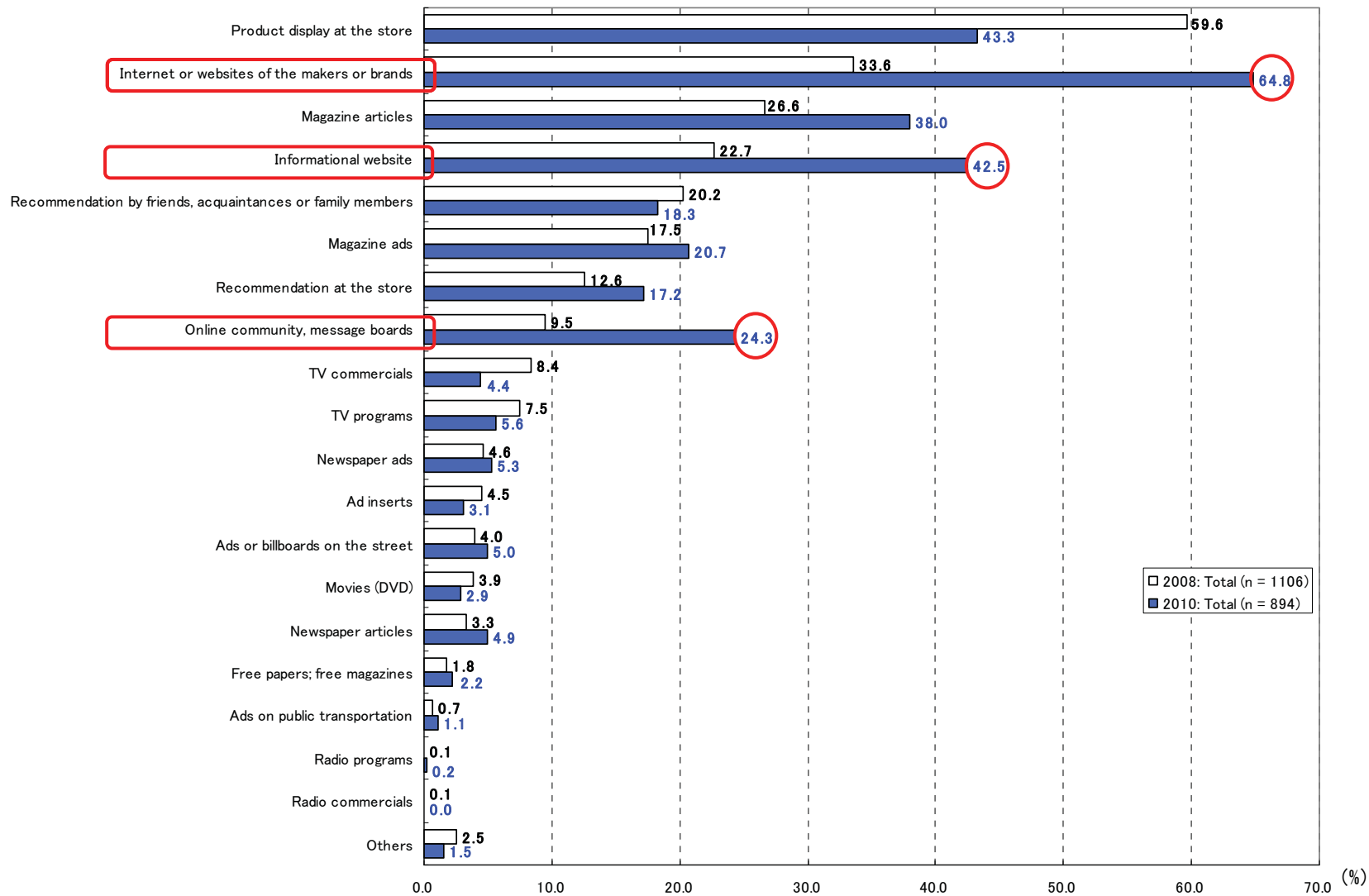


\* Overall, "Price," "Design" and "Specifications (material, processing, waterproof, etc.," ranked high.

\* Male showed "attachment to product itself" such as "Specifications" and "Brand (history, concept)."

\* On the other hand, female placed "Emphasis on security and safety" in areas such as "Location of store" and "Good after-sale service" on purchasing.

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



\* The response rate for “Internet-related media” significantly increased.

\* With the diversification of user needs, the results outstandingly shows the high convenience of the Internet where one can obtain various types of information on products and easily compare prices.

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



	Total male		Male 20s		Male 30s		Male 40s		Male 50s+	
	2008 (n = 538)	2010 (n = 485)	2008 (n = 91)	2010 (n = 106)	2008 (n = 183)	2010 (n = 118)	2008 (n = 148)	2010 (n = 150)	2008 (n = 116)	2010 (n = 111)
Product display at the store	54.3	35.1	58.2	41.5	47.0	33.1	61.5	28.7	53.4	39.6
Internet or websites of the makers or brands	38.7	69.7	35.2	62.3	47.5	68.6	41.9	69.3	23.3	78.4
Magazine articles	22.5	37.3	19.8	38.7	26.2	33.9	21.6	40.0	19.8	36.0
Informational website	26.0	48.0	22.0	50.9	29.5	46.6	29.1	48.7	19.8	45.9
Recommendation by friends, acquaintances or family members	15.1	11.8	22.0	14.2	14.8	10.2	14.2	13.3	11.2	9.0
Magazine ads	13.4	16.7	8.8	16.0	13.1	6.8	11.5	18.7	19.8	25.2
Recommendation at the store	8.7	12.8	8.8	19.8	8.7	9.3	6.8	12.7	11.2	9.9
Online community, message boards	10.6	27.2	12.1	36.8	18.6	25.4	6.1	28.7	2.6	18.0
TV commercials	6.3	4.3	9.9	5.7	6.6	0.8	4.1	5.3	6.0	5.4
TV programs	5.2	4.7	8.8	7.5	7.1	0.8	2.7	4.0	2.6	7.2
Newspaper ads	4.8	5.6	3.3	4.7	4.9	1.7	2.7	5.3	8.6	10.8
Ad inserts	3.7	2.7	3.3	2.8	3.3	0.8	2.7	3.3	6.0	3.6
Ads or billboards on the street	3.2	4.1	2.2	7.5	4.4	1.7	3.4	4.0	1.7	3.6
Movies (DVD)	4.3	3.5	4.4	8.5	5.5	1.7	2.7	2.0	4.3	2.7
Newspaper articles	3.0	4.5	0.0	6.6	3.3	2.5	2.7	3.3	5.2	6.3
Free papers: free magazines	1.5	1.4	3.3	2.8	2.7	0.0	0.0	2.0	0.0	0.9
Ads on public transportation	0.2	0.6	0.0	1.9	0.0	0.0	0.7	0.0	0.0	0.9
Radio programs	0.2	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0
Radio commercials	0.2	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Others	2.6	2.1	4.4	0.9	3.3	0.0	2.0	3.3	0.9	3.6

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

	Total female		Female 20s		Female 30s		Female 40s		Female 50s+	
	2008 (n = 568)	2010 (n = 409)	2008 (n = 130)	2010 (n = 89)	2008 (n = 174)	2010 (n = 117)	2008 (n = 175)	2010 (n = 124)	2008 (n = 89)	2010 (n = 79)
Product display at the store	64.6	53.1	69.2	51.7	69.5	53.0	61.1	52.4	55.1	55.7
Internet or websites of the makers or brands	28.9	58.9	30.0	64.0	32.8	59.0	31.4	56.5	14.6	57.0
Magazine articles	30.5	38.9	27.7	37.1	36.8	46.2	32.0	39.5	19.1	29.1
Informational website	19.5	35.9	20.0	39.3	25.9	39.3	19.4	31.5	6.7	34.2
Recommendation by friends, acquaintances or family members	25.0	26.2	28.5	25.8	23.0	23.1	25.1	29.8	23.6	25.3
Magazine ads	21.3	25.4	20.8	21.3	21.8	24.8	21.7	28.2	20.2	26.6
Recommendation at the store	16.2	22.5	25.4	28.1	16.1	23.1	10.9	18.5	13.5	21.5
Online community, message boards	8.5	20.8	12.3	29.2	9.8	22.2	5.7	15.3	5.6	17.7
TV commercials	10.4	4.4	12.3	5.6	8.0	3.4	9.1	4.0	14.6	5.1
TV programs	9.7	6.6	6.2	3.4	15.5	7.7	7.4	8.1	7.9	6.3
Newspaper ads	4.4	4.9	2.3	2.2	4.6	5.1	2.9	4.0	10.1	8.9
Ad inserts	5.3	3.7	6.2	2.2	4.0	2.6	3.4	4.0	10.1	6.3
Ads or billboards on the street	4.8	6.1	7.7	9.0	5.2	8.5	2.9	3.2	3.4	3.8
Movies (DVD)	3.5	2.2	5.4	1.1	2.3	1.7	2.3	4.0	5.6	1.3
Newspaper articles	3.5	5.4	2.3	6.7	2.3	3.4	2.9	3.2	9.0	10.1
Free papers: free magazines	2.1	3.2	0.8	7.9	2.3	1.7	3.4	3.2	1.1	0.0
Ads on public transportation	1.2	1.7	2.3	3.4	0.6	0.0	1.7	2.4	0.0	1.3
Radio programs	0.0	0.5	0.0	1.1	0.0	0.0	0.0	0.8	0.0	0.0
Radio commercials	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Others	2.5	0.7	2.3	0.0	1.1	0.0	3.4	0.0	3.4	3.8

\* There was a tendency for male to “put importance on information from the Internet” while female combined “the Internet and storefront.”

■ Magazine subscription ranking (by sex)



2008 (Male)	
name of magazine subscriber	Male (n = 329)
Otona no Shuumatsu	13.1
Otoko no Kakurega	11.9
serai	11.2
Nikkei Otona no OFF	9.4
LEON	8.8
Sekai no Udedokei	7.9
BRUTUS	7.0
GoodPress	6.4
Begin	5.2
MEN'S NON-NO	5.2
MEN'S CLUB	4.9
Jiyujin	4.9
Pen	4.9
Sanpo no Tatsujin	4.6
monomagazine	4.3
GetNavi	4.3
smart	3.6
MEN'S EX	3.0
Ikkojin	3.0
Takei begin	3.0

- To 3rd place  
 → To 4th place  
 → To 6th place  
 → To 9th place  
 → To 2nd place  
 → To 8th place  
 → To 12th place  
 → To 14th place  
 → To 7th place  
 → To 18th place  
 - Ranked out  
 → To 15th place  
 → To 5th place  
 → -  
 - Ranked out  
 → To 20th place  
 → To 13th place

2010 (Male)		
Order	name of magazine subscriber	Male (n = 750)
1	Otona no Shuumatsu	11.5
2	Sekai no Udedokei	8.9
3	Otoko no Kakurega	8.5
4	serai	8.4
5	monomagazine	7.1
6	Nikkei Otona no OFF	6.9
7	MEN'S NON-NO	6.9
8	BRUTUS	6.7
9	LEON	5.9
10	Tarzan	5.9
11	MEN'S CLUB	5.7
12	GoodPress	5.6
13	Takei begin	5.2
14	Begin	4.9
15	Sanpo no Tatsujin	4.7
16	GetNavi	4.7
17	smart	3.5
18	Jiyujin	3.3
19	Gainer	3.3
20	Ikkojin	2.7

Ranked in  
 Ranked in  
 Ranked in

2010 Female	
name of magazine subscriber	Female (n = 410)
MORE	12.4
With	12.4
Oggi	10.2
CLASSY.	9.3
Nikkei Woman	9.0
an an	9.0
CanCan	8.3
Biteki	7.8
Domani	6.8
Katei Gaho	6.8
STORY	6.6
VERY	6.6
Fujin Koron	6.1
FRaU	5.9
Fujin Gaho	5.6
LEE	5.6
CREA	5.1
MRS	4.9
JJ	4.4
VIVI	4.4
VoCE	4.4

- To 4th place  
 → To 6th place  
 → To 9th place  
 → To 15th place  
 → To 14th place  
 → To 19th place  
 → To 8th place  
 → To 3rd place  
 → To 7th place  
 → To 21st place  
 - Ranked out  
 → To 10th place  
 → To 13th place  
 - Ranked out  
 - Ranked out  
 → To 16th place  
 → To 12th place  
 → To 18th place

2010 (Female)		
Order	name of magazine subscriber	Female (n = 750)
1	MORE	12.8
2	With	10.9
3	STORY	10.4
4	Oggi	10.3
5	Nikkei Woman	9.5
6	CLASSY.	9.5
7	VERY	8.8
8	Katei Gaho	7.1
9	an an	6.8
10	Fujin Gaho	6.8
11	AneCan	6.4
12	VIVI	6.3
13	LEE	6.0
14	Biteki	5.6
15	CanCan	5.2
16	JJ	5.2
17	MAQUIA	4.8
18	Voce	4.3
19	Domani	4.1
20	serai	4.0
21	Fujin Koron	3.9

Ranked in  
 Ranked in  
 Ranked in

- \* In 2010, too, "Fashion/life style magazines," "Watch specialty magazines" and "Gadget magazines" were the most popular answers.
- \* "Watch specialty magazines" and "Gadget magazines" rose significantly in the rankings for male.
- \* "Fashion/life style magazines" was the dominant answer for female.

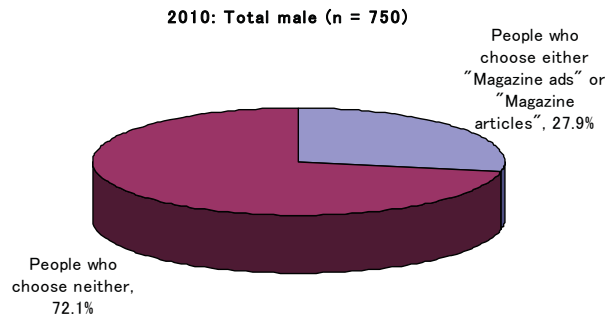
■ Magazine which motivates to buy a watch\*

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

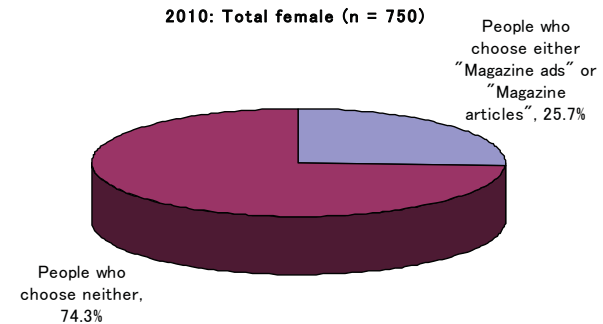
People who selected either "Magazine ads" or "Magazine articles" to the question "What source of information do you put importance on when purchasing a watch?"



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



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



■ 2010 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 = 209)
1	Otona no Shuumatsu	11.5	→ To 3rd place	1	Sekai no Udedokei	19.1
2	Sekai no Udedokei	8.9	→ To 1st place	2	Takei begin	14.8
3	Otoko no Kakurega	8.5	→ To 7th place	3	Otona no Shuumatsu	14.4
4	Serai	8.4	→ To 5th place	4	Begin	12.9
5	monomagazine	7.1	→ To 9th place	5	Serai	12.4
6	Nikkei Otona no OFF	6.9	→ To 13th place	6	Nikkei Otona no OFF	12.0
7	MEN'S NON-NO	6.9	→ To 10th place	7	Otoko no Kakurega	11.5
8	BRUTUS	6.7	→ To 14th place	8	BRUTUS	11.5
9	LEON	5.9	→ To 15th place	9	monomagazine	11.0
10	Farzan	5.9	→ To 11th place	10	LEON	10.5
11	MEN'S CLUB	5.7	→ To 2nd place	11	GoodPress	10.5
12	GoodPress	5.6	→ To 4th place	12	GetNavi	9.6
13	Takei begin	5.2	→ To 17th place	13	MEN'S NON-NO	8.1
14	Begin	4.9	→ To 12th place	14	Farzan	7.7
15	Sanpo no Tatsujin	4.7	→ To 20th place	15	MEN'S CLUB	7.2
16	GetNavi	4.7	→ To 18th place	16	pen	5.3
17	smart	3.5	→ Ranked out	17	Sanpo no Tatsujin	5.3
18	Jiyuujin	3.3	→ Ranked out	18	Gainer	5.3
19	Gainer	3.3	→ Ranked out	19	MEN'S EX	4.8
20	Ikkoin	2.7	→ Ranked out	20	Jiyuujin	4.3

■ 2010 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 motivated them to buy a watch	Female (n = 193)
1	MORE	12.8	→ To 7th place	1	MORE	18.7
2	With	10.9	→ To 6th place	2	With	17.1
3	STORY	10.4	→ To 12th place	3	STORY	16.1
4	Oggi	10.3	→ To 8th place	4	Oggi	15.5
5	Nikkei Woman	9.5	→ To 16th place	5	Nikkei Woman	14.5
6	CLASSY.	9.5	→ To 14th place	6	VERY	14.0
7	VERY	8.8	→ To 13th place	7	CLASSY.	11.9
8	Katei Gaho	7.1	→ To 9th place	8	an an	11.9
9	an an	6.8	→ To 10th place	9	LEE	10.4
10	Fujin Gaho	6.8	→ To 19th place	10	Biteki	9.8
11	AneCan	6.4	→ Ranked out	11	MAQUIA	9.8
12	VIVI	6.3	→ To 11th place	12	Katei Gaho	9.3
13	LEE	6.0	→ To 17th place	13	VIVI	8.8
14	Biteki	5.6	→ To 15th place	14	AneCan	8.8
15	CanCan	5.2	→ Ranked out	15	Domani	8.3
16	JJ	5.2	→ Ranked out	16	Fujin Gaho	7.8
17	MAQUIA	4.8	→ To 18th place	17	Voce	6.7
18	Voce	4.3	→ To 20th place	18	Otona no Shuumatsu	5.2
19	Domani	4.1	→ Ranked out	19	CanCan	5.2
20	Serai	4.0	→ Ranked out	20	FraU	5.2
21	Fujin Koron	3.9	→ Ranked out	21	FIGARO JAPON	5.2

\* "Watch specialty magazines" and "Gadget magazines," which have much product information, was ranked very highly by male.

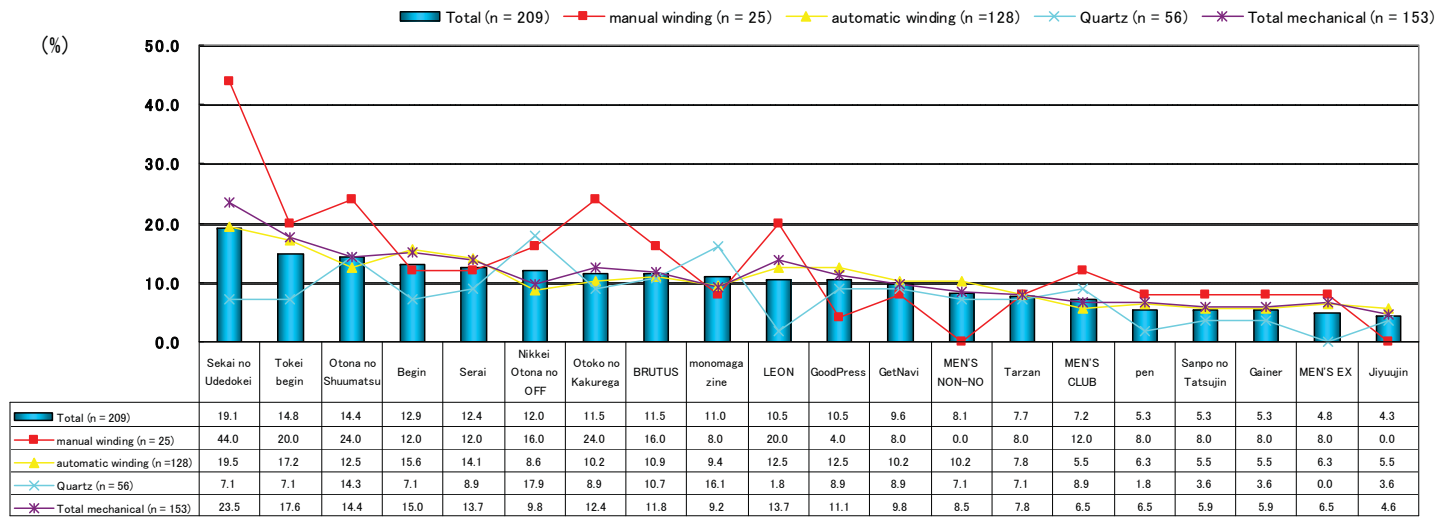
\*\*"Fashion/life style magazines" was the most popular answer for young and middle-aged female.



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

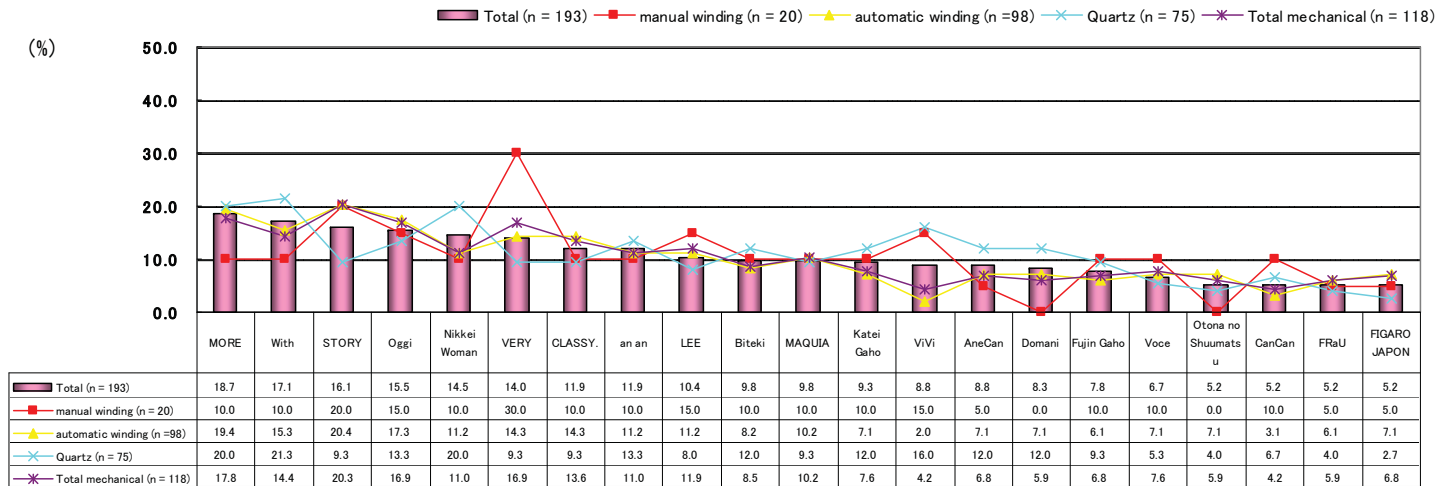


2010



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

2010

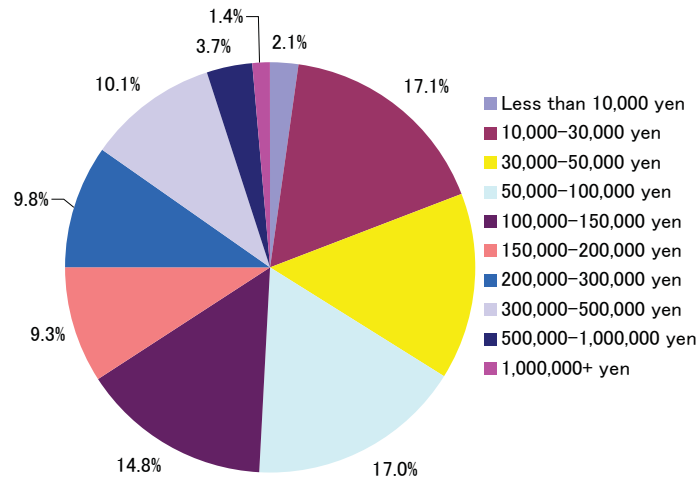


■ Purchase price of watch owned by region

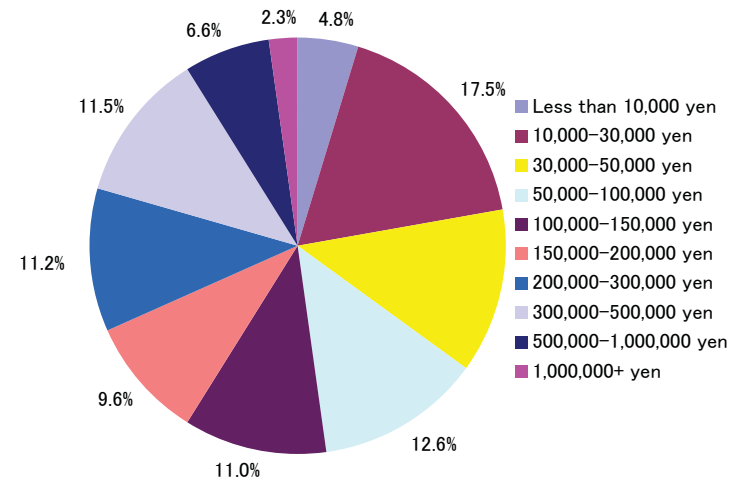
\*In the 2010 survey, the list is created based on the “purchase price of the most favorite watch” out of all watches owned.



Purchase price of watch owned in 2008: Nationwide (n = 765)



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



	Hokkaido and Tohoku		Kanto and Koshinetsu		Chubu and Hokuriku		Kansai		Chugoku, Shikoku and Kyushu	
	2008 (n = 53)	2010 (n = 126)	2008 (n = 351)	2010 (n = 637)	2008 (n = 83)	2010 (n = 167)	2008 (n = 179)	2010 (n = 274)	2008 (n = 99)	2010 (n = 166)
Less than 10,000 yen	0.0	9.5	1.7	4.4	2.4	4.8	1.7	3.3	5.1	5.4
10,000-30,000 yen	24.5	15.1	14.0	17.7	16.9	19.2	16.2	17.2	26.3	17.5
30,000-50,000 yen	24.5	13.5	14.0	11.1	12.0	15.6	14.5	13.9	15.2	13.9
50,000-100,000 yen	26.4	17.5	16.2	14.6	20.5	9.0	15.6	9.1	14.1	10.8
100,000-150,000 yen	11.3	15.9	19.4	12.1	12.0	4.8	12.3	9.9	7.1	11.4
150,000-200,000 yen	3.8	8.7	8.8	8.9	12.0	9.0	11.2	10.2	8.1	12.0
200,000-300,000 yen	5.7	8.7	10.8	11.6	13.3	9.6	7.3	12.8	10.1	10.8
300,000-500,000 yen	1.9	6.3	10.0	11.0	7.2	16.2	15.6	13.1	7.1	10.2
500,000-1,000,000 yen	1.9	4.0	2.8	6.8	2.4	7.8	5.6	6.9	5.1	6.0
1,000,000+ yen	0.0	0.8	2.3	1.7	1.2	4.2	0.0	3.6	2.0	1.8

\* Those in the “Hokkaido-Tohoku” preferred a low price, and those in the “Kanto-Koshinetsu” and “Chugoku-Shikoku-Kyushu” covered a wide range of prices “from 10,000-500,000 yen.”

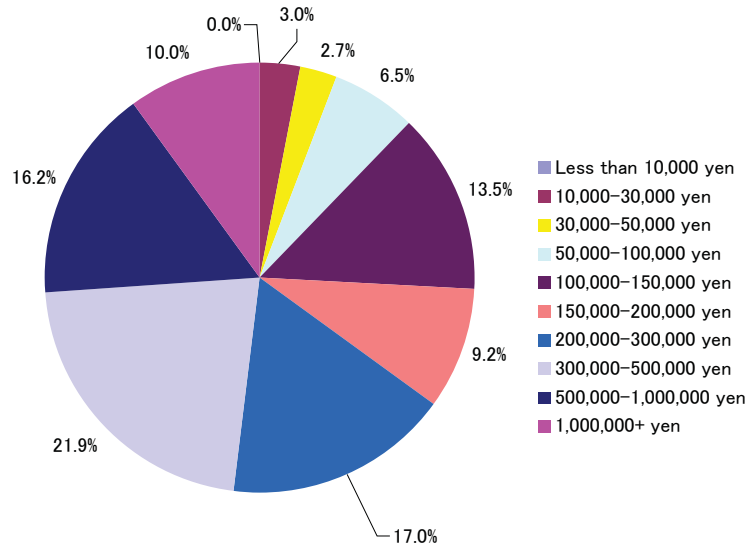
\* In “Chubu-Hokuriku” and “Kansai,” there is a polarization between a low price range and mid-to-high price range of “10,000-50,000 yen” and “200,000-500,000 yen.”

■ Price range of watch you want to buy by region

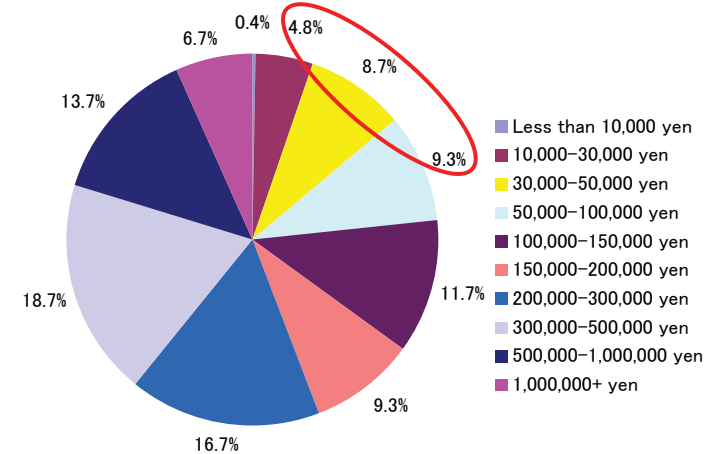
\*In the 2010 survey, the list is created based on the “purchase price of the watch you want the most” out of all watches.



2008 Price range of watch you want to buy : Nationwide (n = 401)



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



	Hokkaido and Tohoku		Kanto and Koshinetsu		Chubu and Hokuriku		Kansai		Chugoku, Shikoku and Kyushu	
	2008 (n = 26)	2010 (n = 100)	2008 (n = 184)	2010 (n = 489)	2008 (n = 45)	2010 (n = 122)	2008 (n = 99)	2010 (n = 198)	2008 (n = 47)	2010 (n = 131)
Less than 10,000 yen	0.0	1.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0
10,000-30,000 yen	0.0	10.0	2.7	3.9	2.2	7.4	2.0	3.5	8.5	3.8
30,000-50,000 yen	7.7	7.0	2.7	9.0	0.0	5.7	4.0	7.6	0.0	13.0
50,000-100,000 yen	11.5	11.0	4.9	11.2	8.9	4.9	8.1	7.1	4.3	8.4
100,000-150,000 yen	30.8	18.0	12.0	10.4	13.3	9.0	13.1	13.6	10.6	11.5
150,000-200,000 yen	3.8	6.0	10.3	11.5	8.9	7.4	8.1	7.6	10.6	8.4
200,000-300,000 yen	19.2	17.0	19.6	17.0	15.6	13.1	15.2	15.2	10.6	21.4
300,000-500,000 yen	19.2	16.0	20.1	16.2	24.4	27.9	20.2	23.2	31.9	14.5
500,000-1,000,000 yen	3.8	7.0	18.5	13.7	13.3	16.4	19.2	14.6	10.6	14.5
1,000,000+ yen	3.8	7.0	9.2	6.5	13.3	8.2	10.1	7.6	12.8	4.6

\* In all Japan, those answering the price range of “10,000-100,000 yen” increased in number.

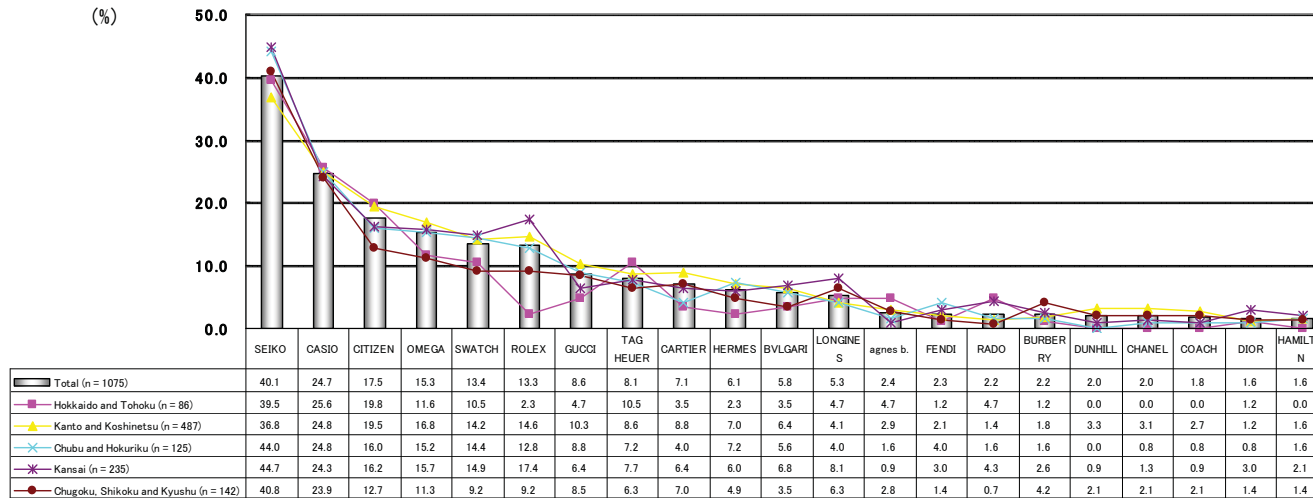
\* On the other hand, those in “Chubu-Hokuriku,” “Kansai” and “Chugoku-Shikoku-Kyushu,” still show a high demand for the high price range of “200,000-1,000,000 yen.” The trend of “High price in the west and low price in the east” for watches that consumers want became apparent.

■ Brand of watch owned by region



2008

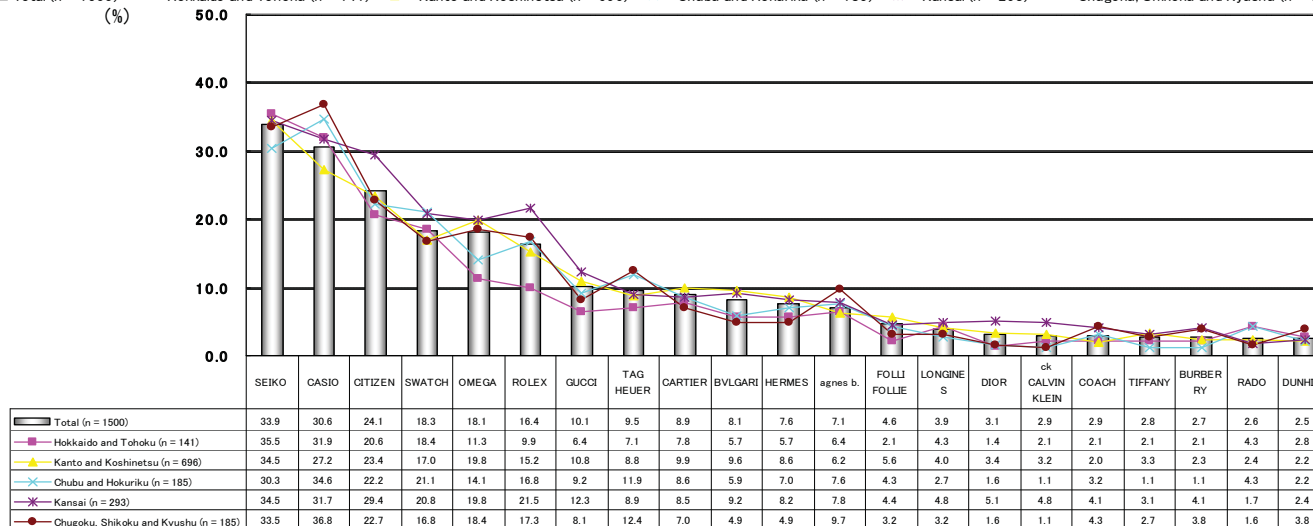
■ Total (n = 1075) ■ Hokkaido and Tohoku (n = 86) ▲ Kanto and Koshinetsu (n = 487) ◆ Chubu and Hokuriku (n = 125) \* Kansai (n = 235) ● Chugoku, Shikoku and Kyushu (n = 142)



(Numbers are percentages)

2010

■ Total (n = 1500) ■ Hokkaido and Tohoku (n = 141) ▲ Kanto and Koshinetsu (n = 696) ◆ Chubu and Hokuriku (n = 185) \* Kansai (n = 293) ● Chugoku, Shikoku and Kyushu (n = 185)



(Numbers are percentages)

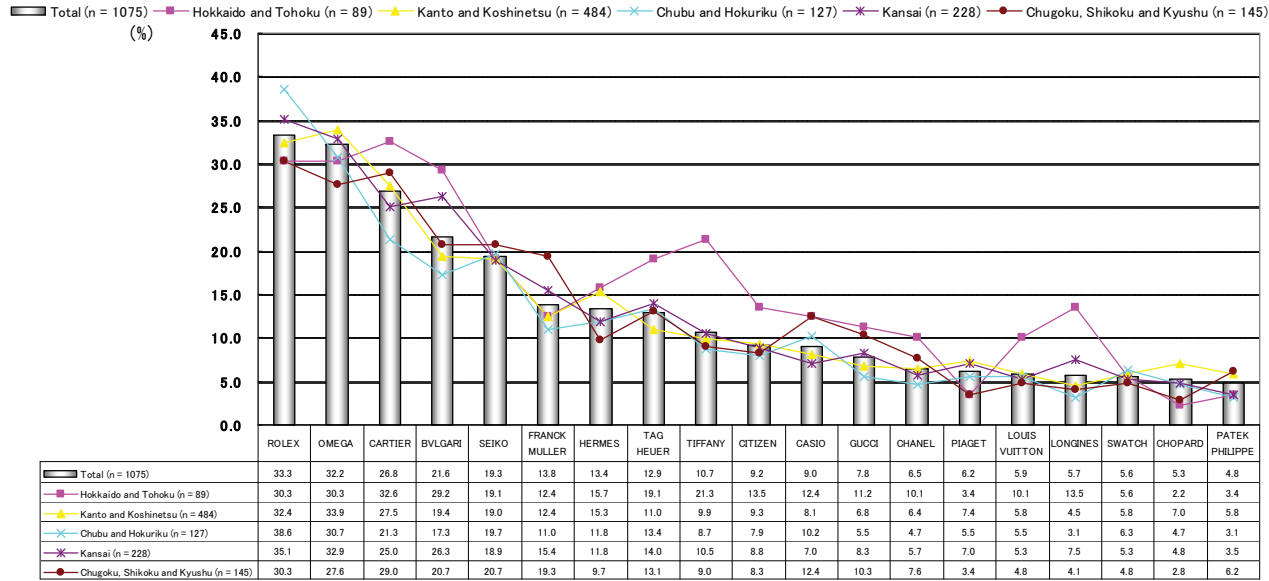
\* In 2010, too, there are many "ROLEX" owners in Kansai.

\* On the other hand, there were many owners of luxury fashion brands such as "GUCCI," "CARTIER," "BVLGARI" and "HERMES" in Kanto-Koshinetsu and Kansai where there are many directly managed stores.

■ Brand of watch you want by region

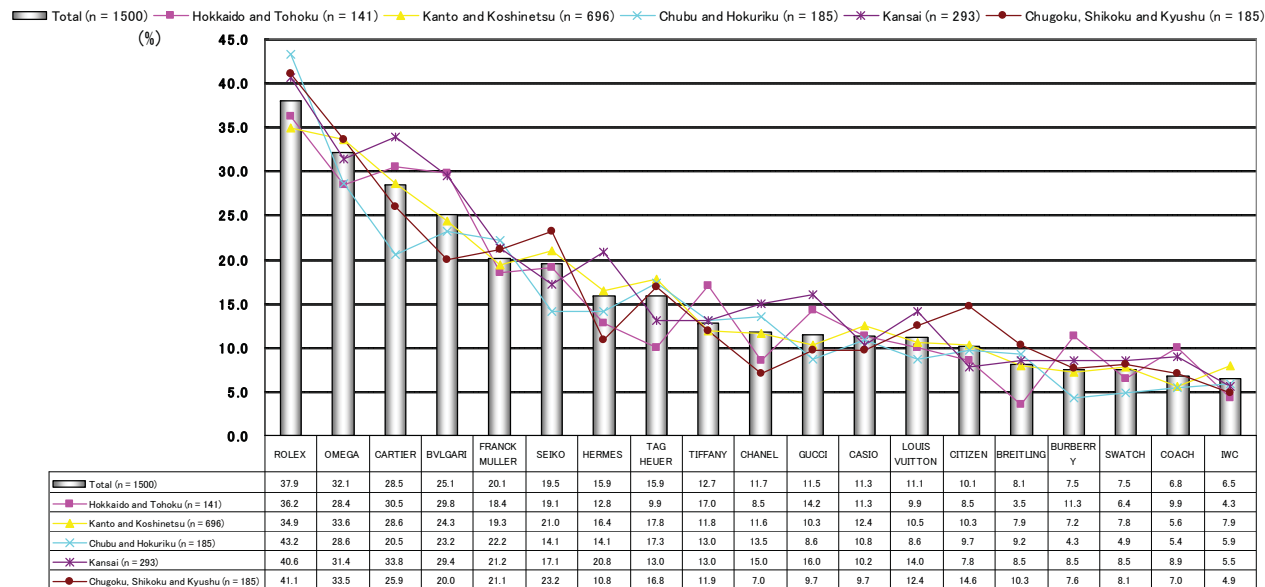


2008



(Numbers are percentages)

2010



(Numbers are percentages)

\* Similar to the brand owned, the response rates for luxury fashion brands such as “CARTIER,” “BVLGARI,” “HERMES,” “CHANEL,” “GUCCI,” and “LOUIS VUITTON” as watch brands that consumers want to buy were high in Kansai.



## ■ Key Findings

# Key Findings



	Major Questions	Page	All	Male	Female
1	Number of watches owned?	16	<p>■ <b>Increase in number of people who own two or more watches</b></p> <ul style="list-style-type: none"> <li>- Of all respondents, 82.8% owned two or more watches in 2010 (+7.2 points compared with 2008)</li> </ul>	<p>■ <b>Those in their 30s and 50s (middle age and senior age groups) account for most of the increase</b></p> <ul style="list-style-type: none"> <li>- 82.0% of men in their 30s have two or more watches (+10.4 points compared with 2008)</li> <li>- 91.6% of men in their 50s have two or more watches (+11.4 points)</li> </ul>	<p>■ <b>Those in their 20s (young-young adults) account for most of the increase</b></p> <ul style="list-style-type: none"> <li>- 78.8% of female in their 20s who have two or more watches (+18.0 points compared with 2008).</li> </ul>
2	Brands of watches owned?	18	<p>■ <b>Big three domestic watch brands are still dominant</b></p> <ul style="list-style-type: none"> <li>- 1st: "SEIKO," 2nd: "CASIO," 3rd: "CITIZEN"</li> <li>- Domestic and high-price brand "SEIKO" fell in popularity</li> <li>- "CASIO" and "CITIZEN" increased in popularity</li> </ul>	<p>■ <b>Affordable domestic watchmakers are most popular</b></p> <ul style="list-style-type: none"> <li>- "CASIO": 38.3% (+4.5 points compared with 2008)</li> <li>- "CITIZEN": 26.7% (+6.8 points)</li> </ul>	<p>■ <b>Reasonably priced fashion watches gained some ground</b></p> <ul style="list-style-type: none"> <li>- "SWATCH": 21.7% (+4.9 points compared with 2008)</li> <li>- "agnes b.": 9.6% (+4.7 points)</li> </ul>
3	Purchase price of watch owned?	20	<p>■ <b>Low-price range accounts for approximately 20+% of total</b></p> <ul style="list-style-type: none"> <li>- "Less than 10,000 yen": 4.8% (+2.7 points compared with 2008)</li> <li>- "10,000-30,000": 17.5% (+0.4 point)</li> </ul>	<p>■ <b>Two clusters exist: low-to-mid price range and mid-to-high price range</b></p> <ul style="list-style-type: none"> <li>- "10,000-100,000 yen": about 45% of all male</li> <li>- "300,000-500,000 yen": 11.4%</li> </ul>	<p>■ <b>Two clusters exist: low price range and mid-to-high price range</b></p> <ul style="list-style-type: none"> <li>- "10,000-50,000 yen": about 29% of all female</li> <li>- "200,000-300,000 yen": 13%</li> </ul>
4	Location of purchase?	21	<p>■ <b>Most people still shop at bricks-and-mortar stores</b></p> <ul style="list-style-type: none"> <li>- 1st: "Watch section at a department store" (52.5%)</li> <li>- 2nd: "Watch and clock specialty store; jewelry store" (42.0%)</li> <li>- 3rd: "Mass retailer; discount store" (34.1%)</li> </ul>	<p>■ <b>Male use the Internet more than females to purchase a watch</b></p> <ul style="list-style-type: none"> <li>- Male 24.8% : Female 14.7% (Ratio of male to female is 1:0.6)</li> </ul>	<p>■ <b>Female prefer bricks-and-mortar stores</b></p> <ul style="list-style-type: none"> <li>- Mainly they shop at "Department stores"</li> <li>- Female chose the answer of "Duty-free shops/Overseas shops" and "Brand boutiques" more often than male</li> </ul>
5	Important factors in choosing a retailer?	25	<p>■ <b>Demand for authorized store remains strong</b></p> <ul style="list-style-type: none"> <li>- 1st: "Handles authorized imports" (62.3%)</li> <li>- 2nd: "Good after-sale service" (51.7%)</li> <li>- 3rd: "Wide assortment" (50.5%)</li> </ul>	<p>■ <b>Price is important for male.</b></p> <ul style="list-style-type: none"> <li>- "Reasonableness of price" is 53.7%, behind the top answer of "Handles authorized imports" (57.1%)</li> </ul>	<p>■ <b>Female are "security and safety oriented."</b></p> <ul style="list-style-type: none"> <li>- 59.2% chose "Good after-sale service," which ranked second following "Handles authorized imports" (67.6%).</li> </ul>
6	Price range of watch you want to buy?	29	<p>■ <b>Purchase price got even lower</b></p> <ul style="list-style-type: none"> <li>- "10,000-100,000 yen": 22.8% (+10.6 points compared with 2008)</li> <li>- Especially so for those in their 20s</li> </ul>	<p>■ <b>What are affordable luxury watches while purchase price declines...</b></p> <ul style="list-style-type: none"> <li>- Purchase price of the watch that respondents want to buy among all male</li> <li>1st: "300,000-500,000 yen" 18.0%</li> <li>2nd: "200,000-300,000 yen" 16.2%</li> <li>- That is, they account for over 34% among all male.</li> </ul>	<p>■ <b>What are affordable luxury watches while purchase price declines...</b></p> <ul style="list-style-type: none"> <li>- Purchase price of watch that respondents want to buy among all female</li> <li>1st: "300,000-500,000 yen" 19.4%</li> <li>2nd: "200,000-300,000 yen" 17.3%</li> <li>- That is, they account for more than 36% among all female.</li> </ul>
7	Brand of the watch you want?	32	<p>■ <b>Big three brands remained popular</b></p> <ul style="list-style-type: none"> <li>- 1st: "ROLEX" (37.9%)</li> <li>- 2nd: "OMEGA" (32.1%)</li> <li>- 3rd: "CARTIER" (28.5%)</li> </ul>	<p>■ <b>Male like "Luxury mechanic sports watches"</b></p> <ul style="list-style-type: none"> <li>- In 2010, "Breitling" and "IWC" ranked at 15th and 19th places respectively.</li> <li>- This has shown the needs for a second or third watch following standard brands such as "ROLEX" and "OMEGA."</li> </ul>	<p>■ <b>Female like "Luxury fashion brand watches"</b></p> <ul style="list-style-type: none"> <li>- In addition to "CARTIER," "ROLEX," "BVLGARI," "OMEGA" and "HERMES" which are ranked highest by female, "Louis Vuitton" (+8.7 points compared with 2008), "CHANEL" (+8.3 points) and "GUCCI" (+6.6 points) rose sharply.</li> </ul>
8	Reason for wanting the brand you do?	34	<p>■ <b>Focus on design remains unchanged</b></p> <ul style="list-style-type: none"> <li>- 1st: "Design" (65.0%)</li> <li>- 2nd: "Famous brand" (36.5%)</li> <li>- 3rd: "Quality/material" (35.7%)</li> </ul>	<p>■ <b>Emphasis on functions and cost performance</b></p> <ul style="list-style-type: none"> <li>- Popular answers among male</li> <li>- "Good functions" (24.3%) --- Female: (15.2%)</li> <li>- "High specifications compared with price" (10.4%) --- Female: (3.8%)</li> </ul>	<p>■ <b>Emphasis on fashionableness and security</b></p> <ul style="list-style-type: none"> <li>- Popular answers among female</li> <li>- "Can readily change to fit on various clothes" (22.2%) ... Male (14.6%)</li> <li>- "Good after-sale service" (16.1%) ... Male (8.3%)</li> </ul>
9	Done pre-purchase research?	35	<p>■ <b>More than half have done research</b></p> <ul style="list-style-type: none"> <li>- "I did research in advance" (59.6%)</li> <li>- "I did not do research in advance" (40.4%)</li> </ul>	<p>■ <b>Male value information</b></p> <ul style="list-style-type: none"> <li>- "I did research in advance" (64.7%)</li> <li>- "I did not do research in advance" (35.3%)</li> </ul>	<p>■ <b>The numbers of female who did research and who did not had no big difference</b></p> <ul style="list-style-type: none"> <li>- "I did research in advance" (54.5%)</li> <li>- "I did not do research in advance" (45.5%)</li> </ul>
10	What research have you done in advance?	36	<p>■ <b>"Price," "Design," and "Specifications" ranked high</b></p> <ul style="list-style-type: none"> <li>- "Price" (90.4%)</li> <li>- "Design" (84.8%)</li> <li>- "Specifications" (64.7%)</li> </ul>	<p>■ <b>"Attachment to product itself"</b></p> <ul style="list-style-type: none"> <li>- Popular answers among male</li> <li>- "Specifications" (68.5%) --- Female: (60.1%)</li> <li>- "Brand (history, concept)" (36.7%) --- Female: (32.8%)</li> </ul>	<p>■ <b>"Emphasis on security and safety"</b></p> <ul style="list-style-type: none"> <li>- High response rates for female</li> <li>- "Location of store" (23.7%) ... Male (14.6%)</li> <li>- "Good after-sales service" (23.0%) ... Male (12.2%)</li> </ul>
11	Media which are influential in purchasing a watch?	37	<p>■ <b>Internet related media have advanced</b></p> <ul style="list-style-type: none"> <li>- 1st: "Makers and brands websites" 64.8% (+31.2 points compared with 2008)</li> <li>- 2nd: "Informational website" 42.5% (+19.8 points)</li> <li>- 4th: "Community/message boards" 24.3% (+14.8 points)</li> </ul>	<p>■ <b>"Putting importance on information on the Internet"</b></p> <ul style="list-style-type: none"> <li>- 1st: "Websites of makers and brands" 69.7%</li> <li>- 2nd: "Informational website" 48.0%</li> </ul>	<p>■ <b>"Combination of the Internet and storefront"</b></p> <ul style="list-style-type: none"> <li>- 1st: "Websites of makers and brands" 58.9%</li> <li>- 2nd: "At the store" 53.1%</li> </ul>



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. 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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