

Bespoke Survey Research

January 2024

Jewelry

Volume 1 | Quarterly Survey

1,250 US Consumers Balanced To Census

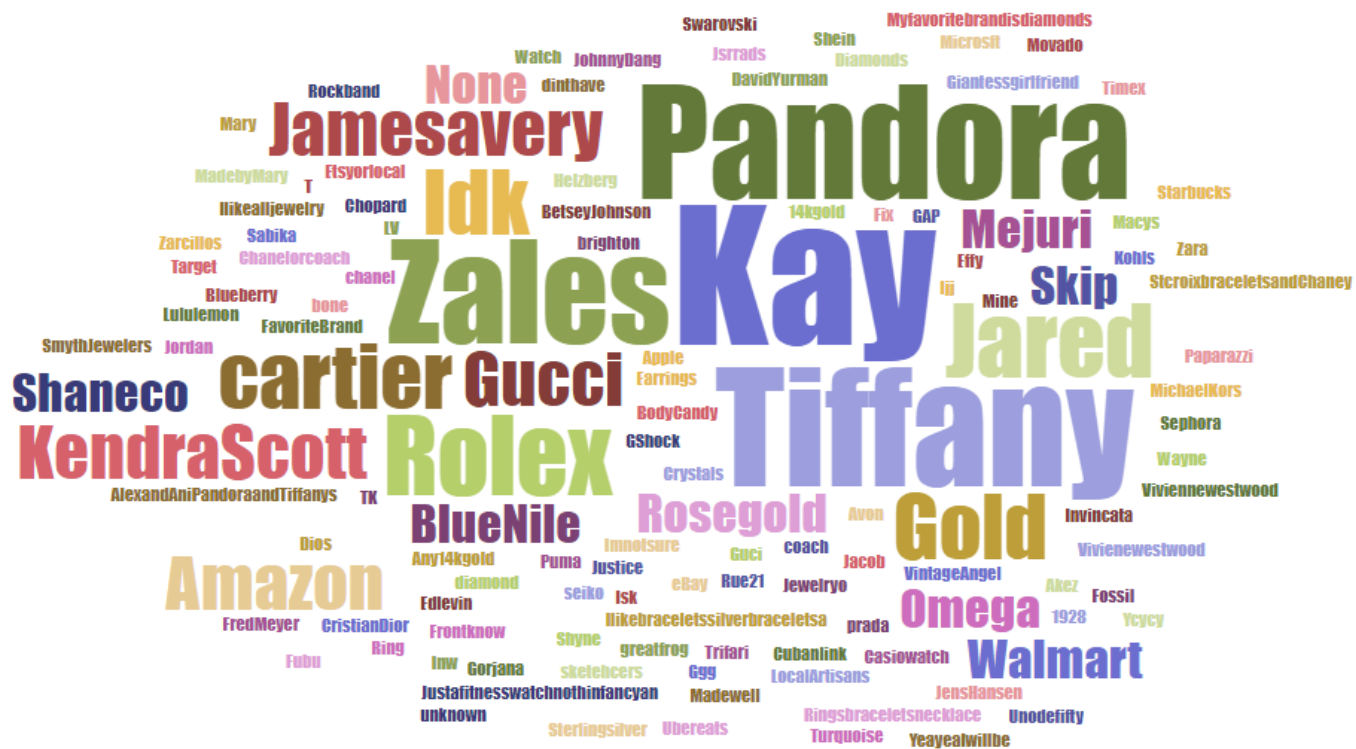
Tickers Covered: Pandora and Competitors

KPIs and Key questions

- Consumers note that they primarily turn to independent jewelry and specialty stores to purchase jewelry.
- If they needed to purchase jewelry today, consumers indicate that they would turn to Zales and Kay. Pandora was more middle of the pack based on our tracker.
- Consumers believe that Tiffany, Pandora, and Kay are becoming more popular.
- A majority of consumers prefer branded jewelry vs. non-branded.
- On net, those who have purchased from Pandora in the past year noted that they are becoming more excited about Pandora products of late.

WHAT IS YOUR FAVORITE BRAND FOR JEWELRY, AND WHY? OPTIONAL QUESTION - SKIP IF YOU DO NOT WEAR JEWELRY

This question was posed to respondents who wear jewelry.

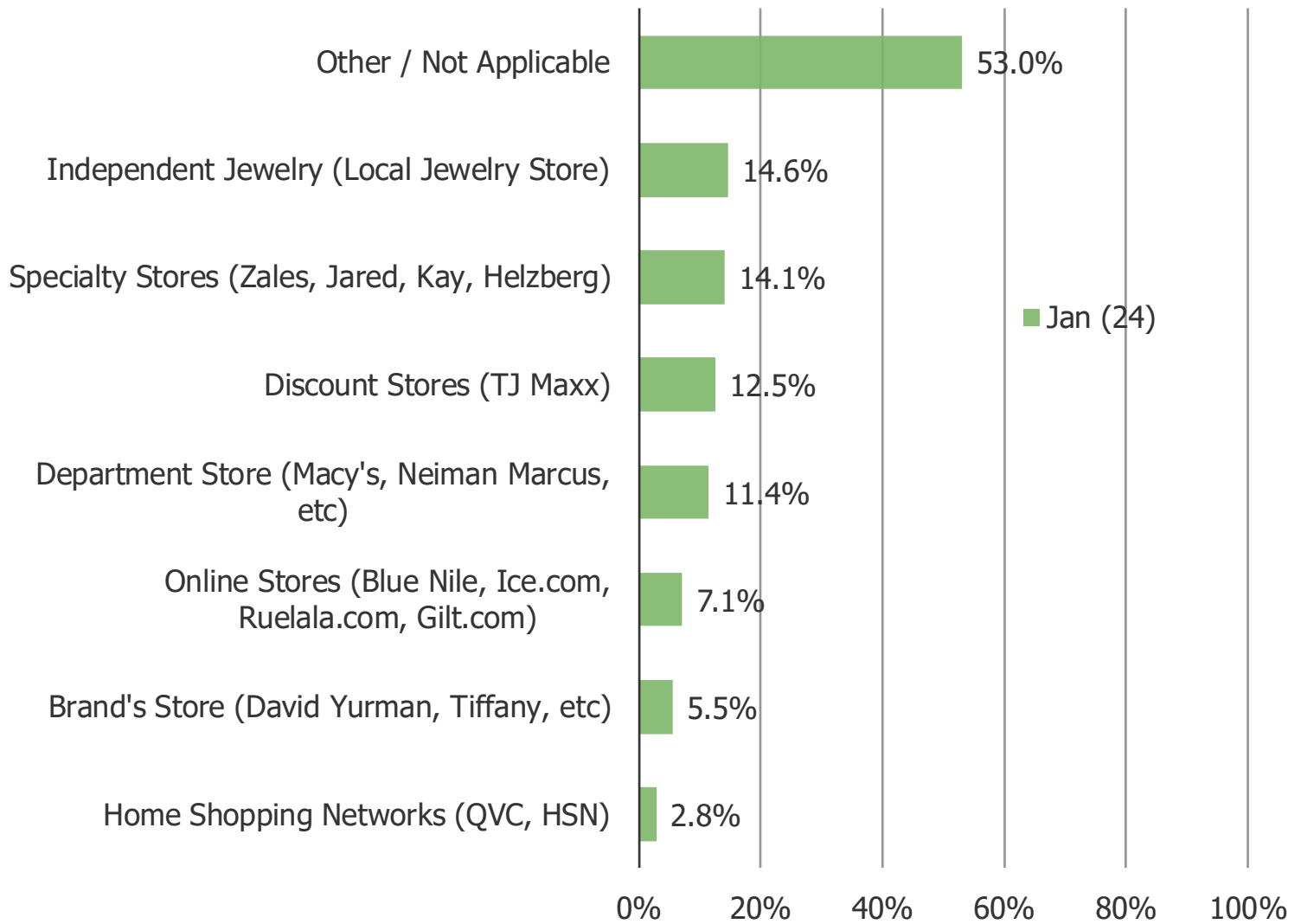


Reasons for filling-in Pandora:

- Beautiful
- Because I just love their bracelets
- Good quality
- Good quality
- Great quality jewelry for low price
- I like this brand because they have some beautiful jewelry.
- It's my wife's favorite.
- Its stainless steel and doesn't tarnish
- Love the selection
- Only one i know
- pretty
- Their pretty.
- They have a lot of cute, simple jewelry
- They have odd pieces of jewelry.
- Variety, personalization, affordable

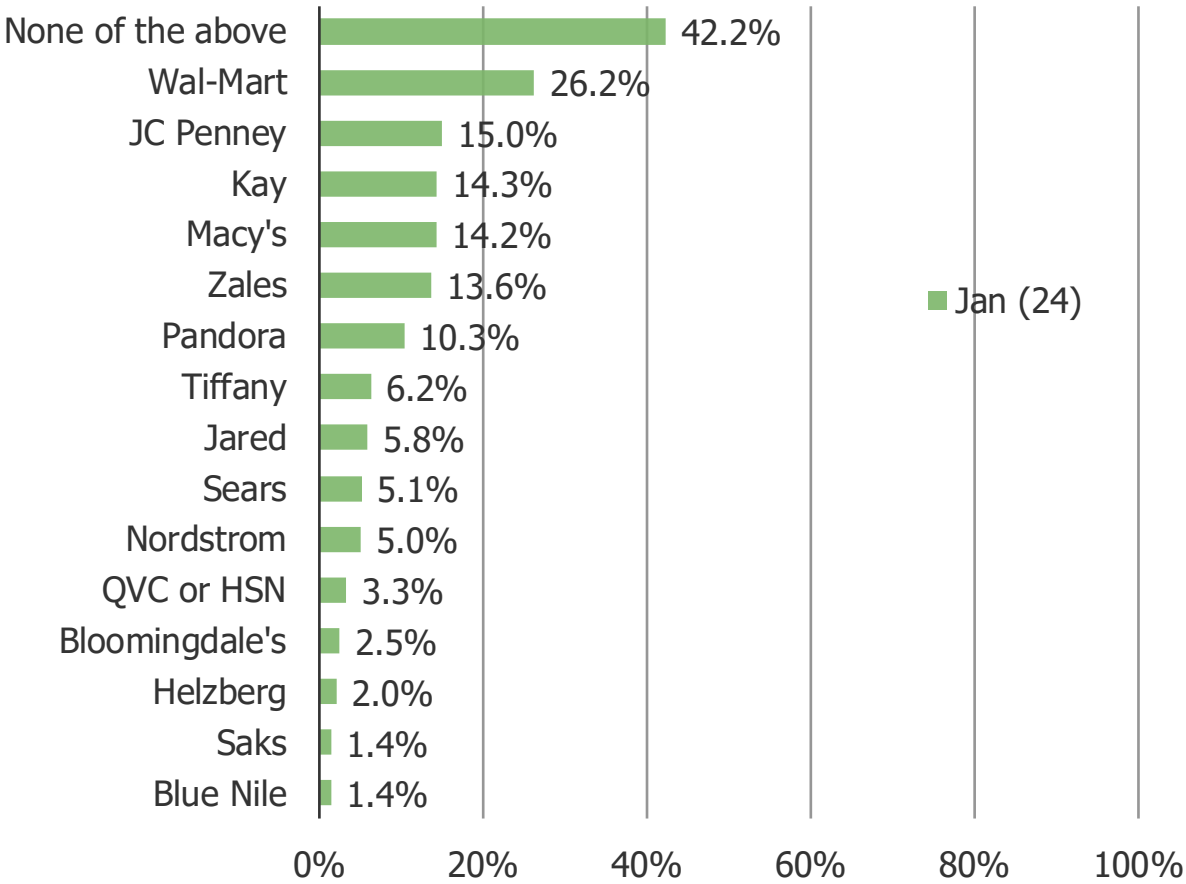
WHERE DO YOU TYPICALLY PREFER TO BUY JEWELRY? (SELECT UP TO TWO CHOICES)

This question was posed to all respondents (N = 1,250).



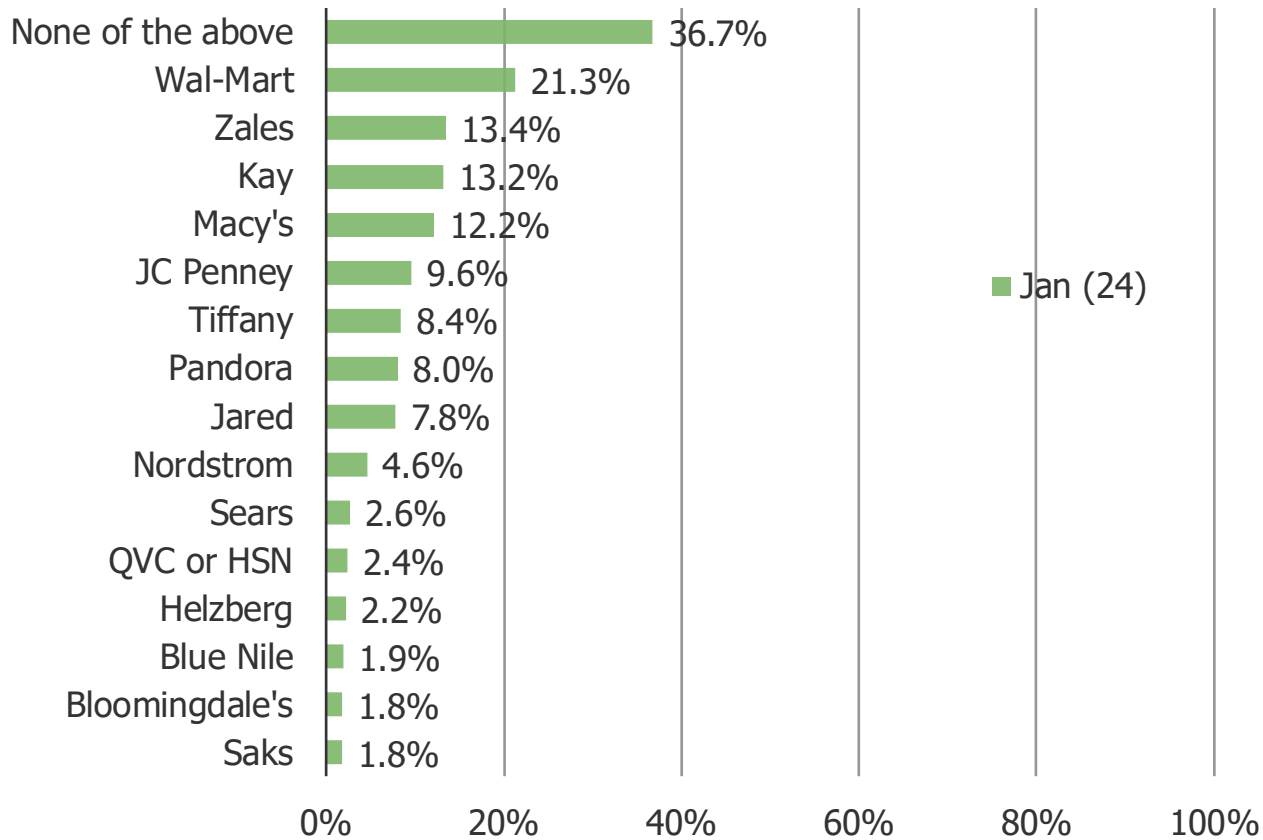
FROM WHICH OF THE FOLLOWING RETAILERS HAVE YOU EVER PURCHASED JEWELRY (FOR YOURSELF OR FOR SOMEONE ELSE)? SELECT ALL THAT APPLY.

This question was posed to all respondents (N = 1,250).



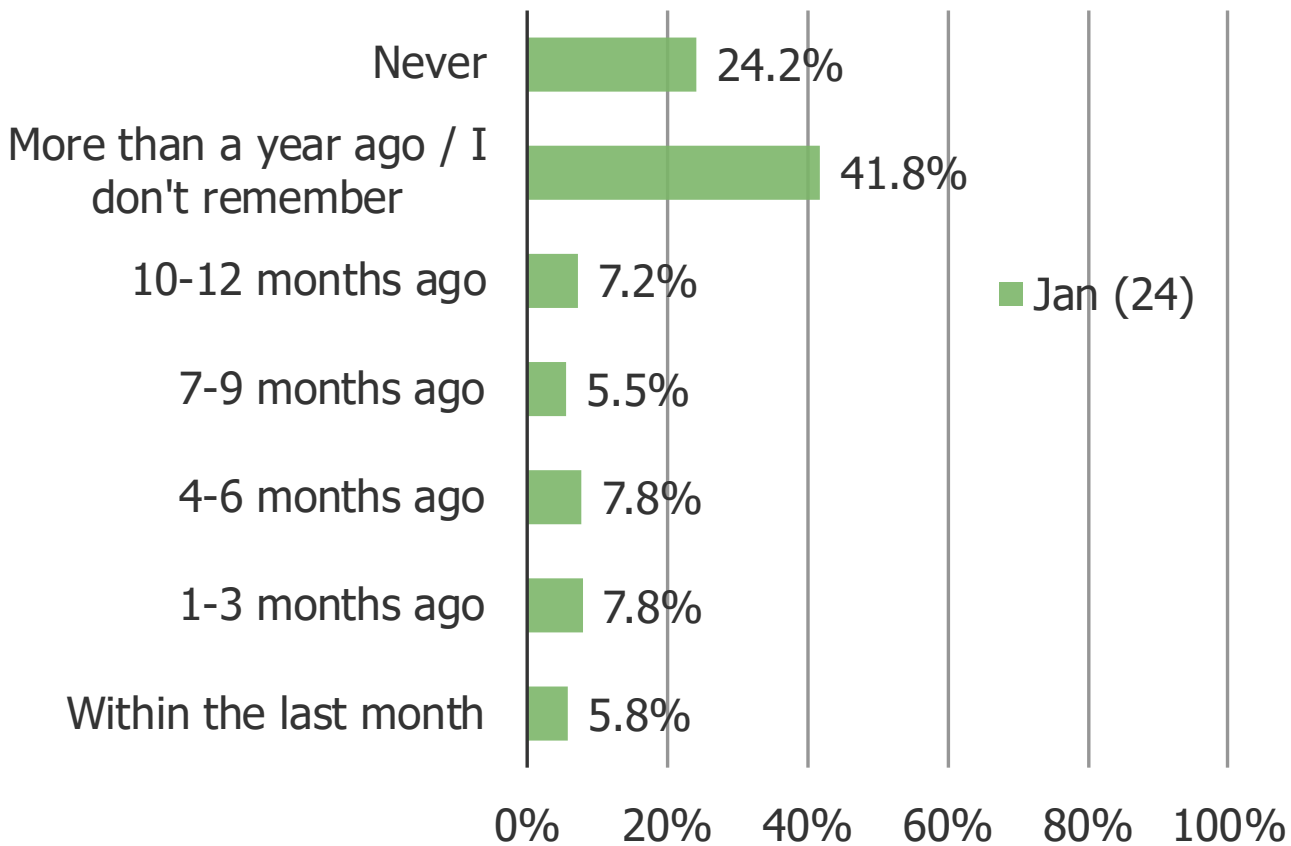
IF YOU NEEDED TO SHOP FOR JEWELRY TODAY, WHICH FROM THE LIST BELOW WOULD YOU BE MOST LIKELY TO TRY FIRST? (SELECT UP TO THREE CHOICES)

This question was posed to all respondents (N = 1,250).



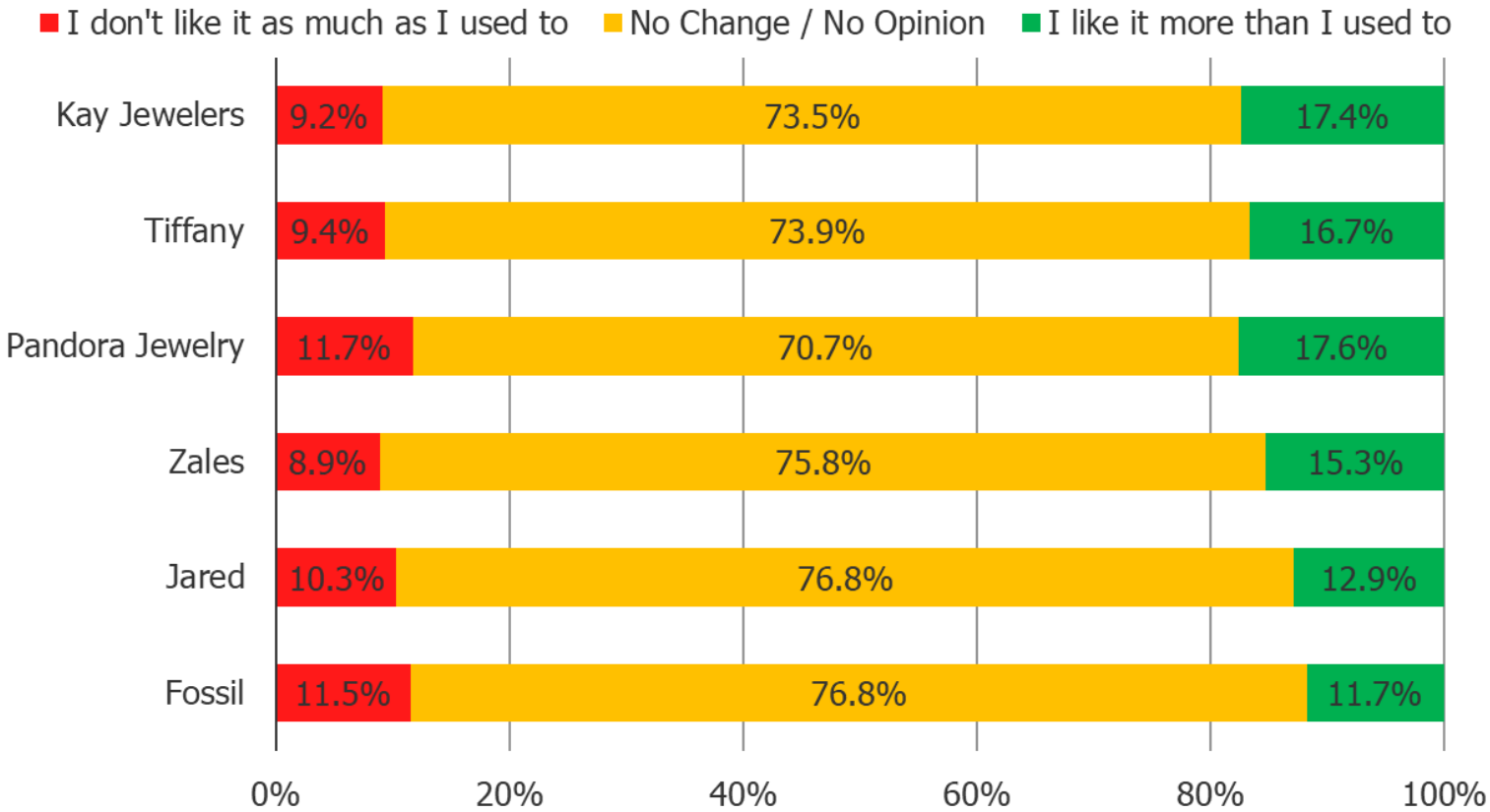
PLEASE DESCRIBE WHEN YOU MOST RECENTLY PURCHASED A PIECE OF JEWELRY.

This question was posed to all respondents (N = 1,250).



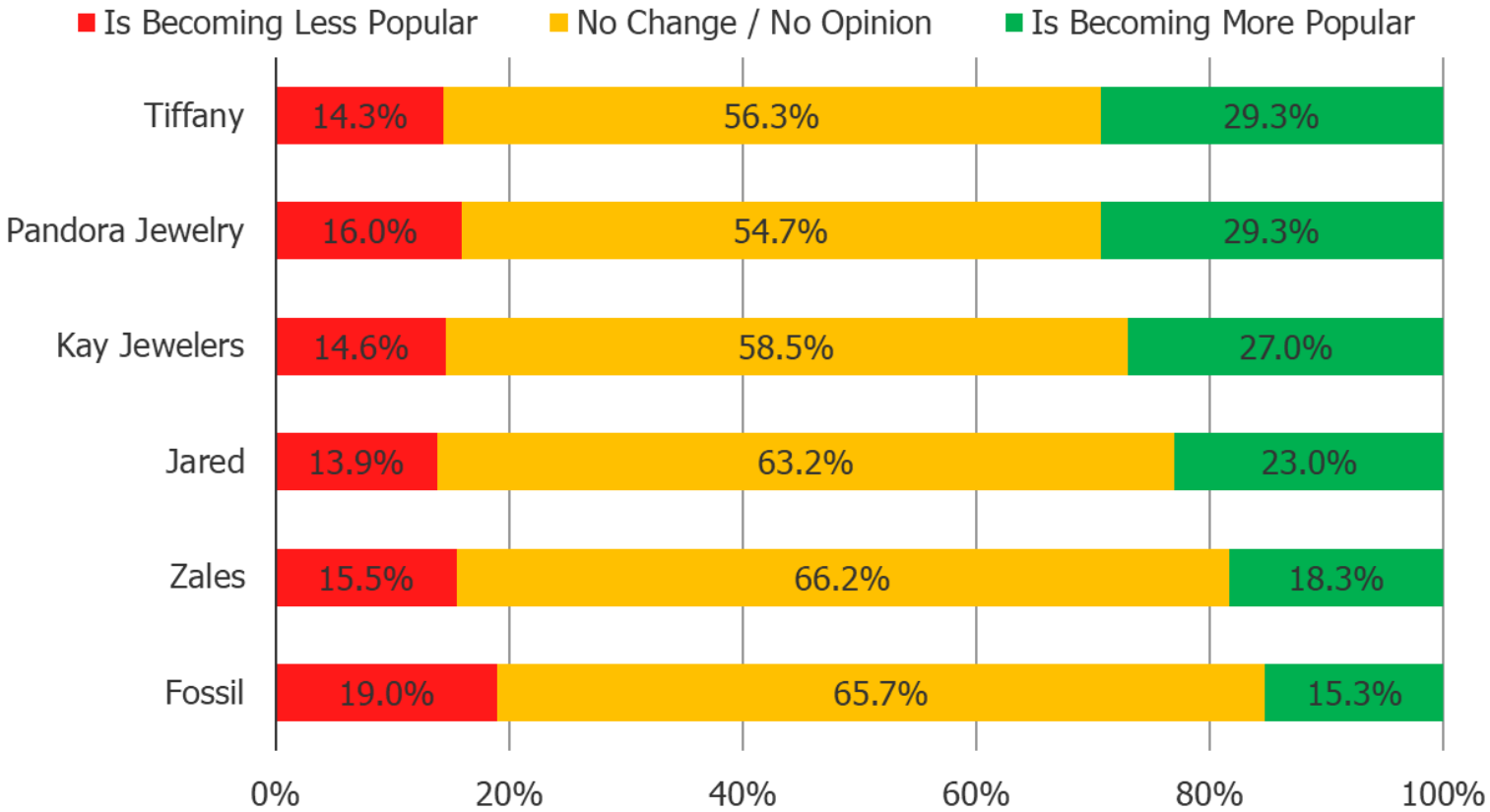
HAS YOUR OPINION OF THE FOLLOWING JEWELERS CHANGED OVER TIME?

This question was posed to respondents who have purchased jewelry in the past year. (N=426)



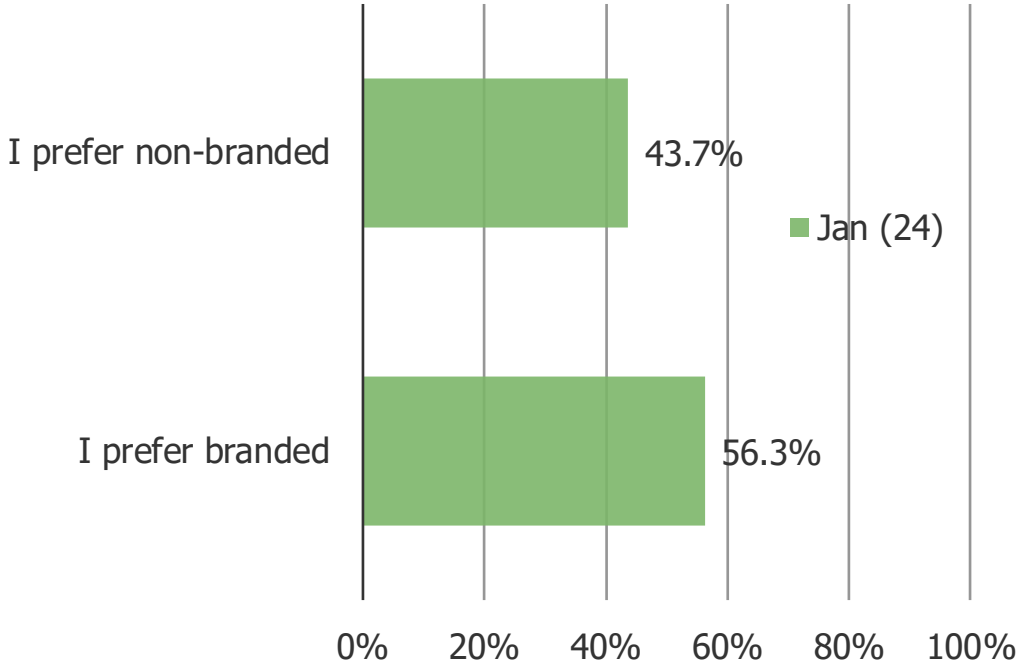
DO YOU THINK THE FOLLOWING JEWELERS ARE BECOMING MORE OR LESS POPULAR?

This question was posed to respondents who have purchased jewelry in the past year. (N=426)



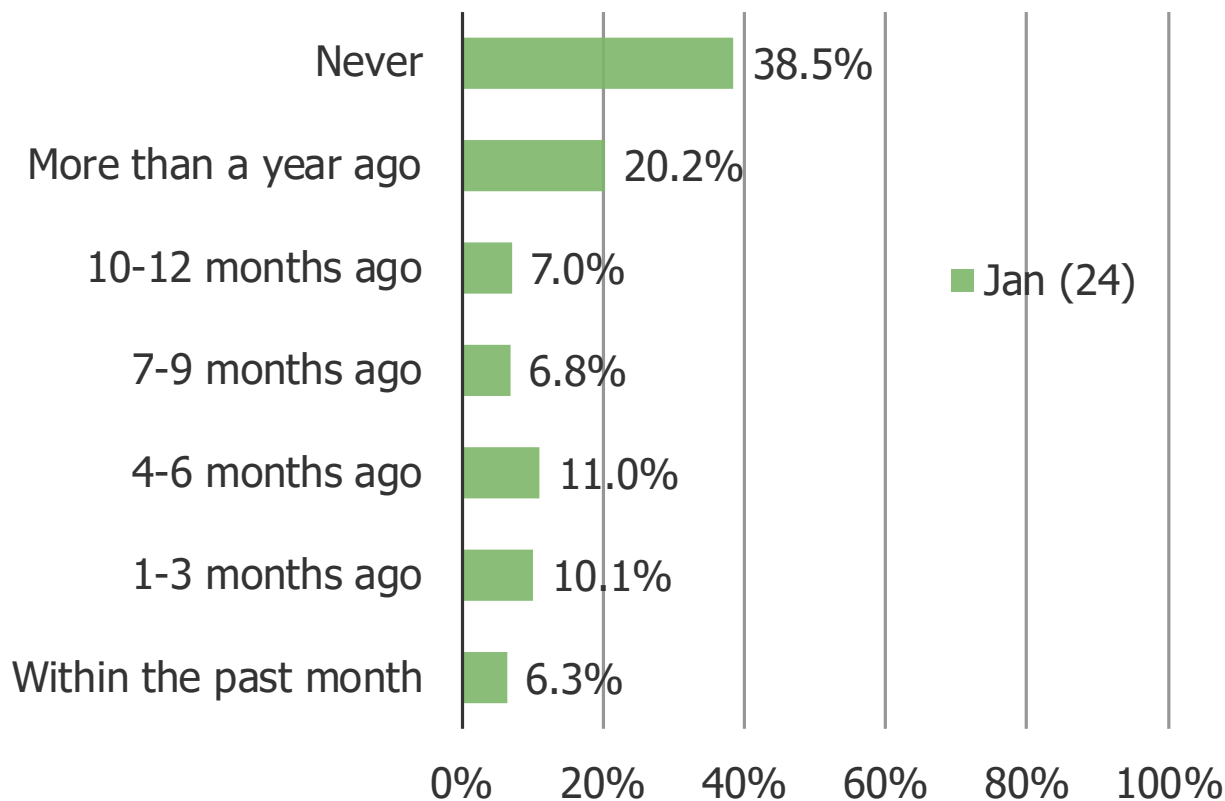
DO YOU PREFER TO WEAR BRANDED OR NON-BRANDED JEWELRY?

This question was posed to respondents who have purchased jewelry in the past year. (N=426)



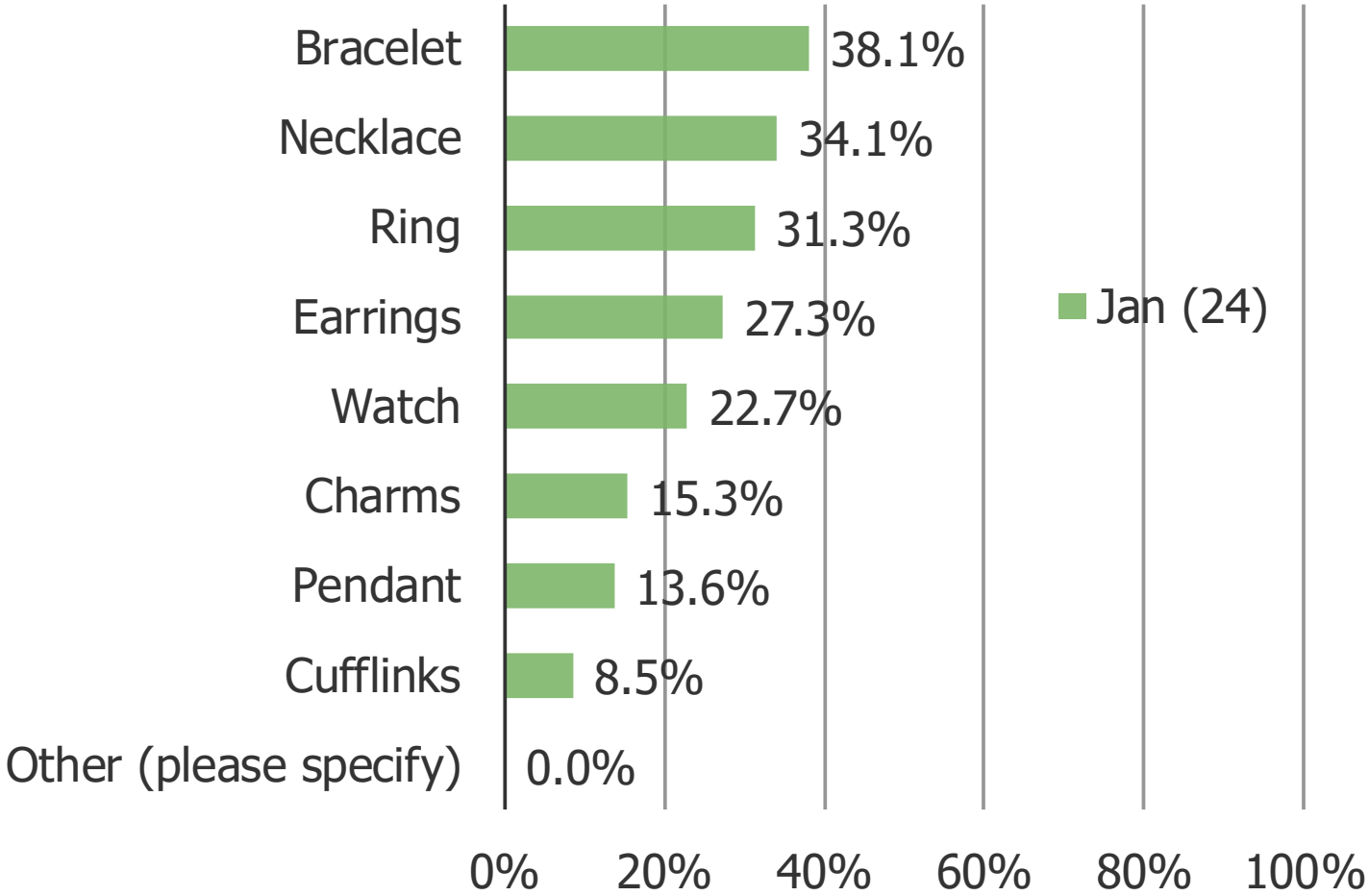
WHEN IS THE LAST TIME THAT YOU PURCHASED PANDORA JEWELRY?

This question was posed to respondents who have purchased jewelry in the past year. (N=426)



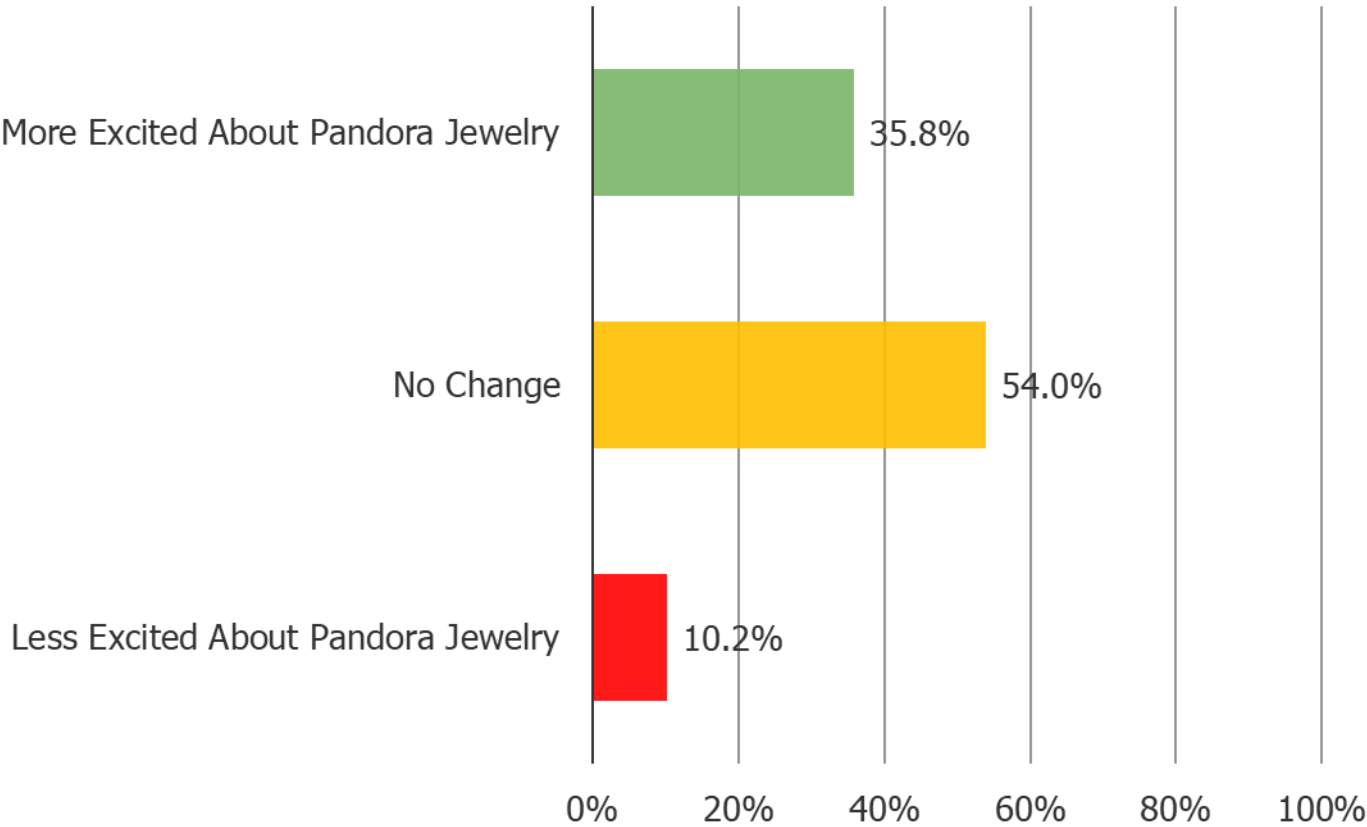
WHICH OF THE FOLLOWING TYPES OF JEWELRY HAVE YOU PURCHASED (FOR YOURSELF OR FOR SOMEONE ELSE) FROM PANDORA IN THE PAST 12 MONTHS? (SELECT ALL THAT APPLY)

This question was posed to respondents who have purchased jewelry from Pandora in the past year. (N=176)



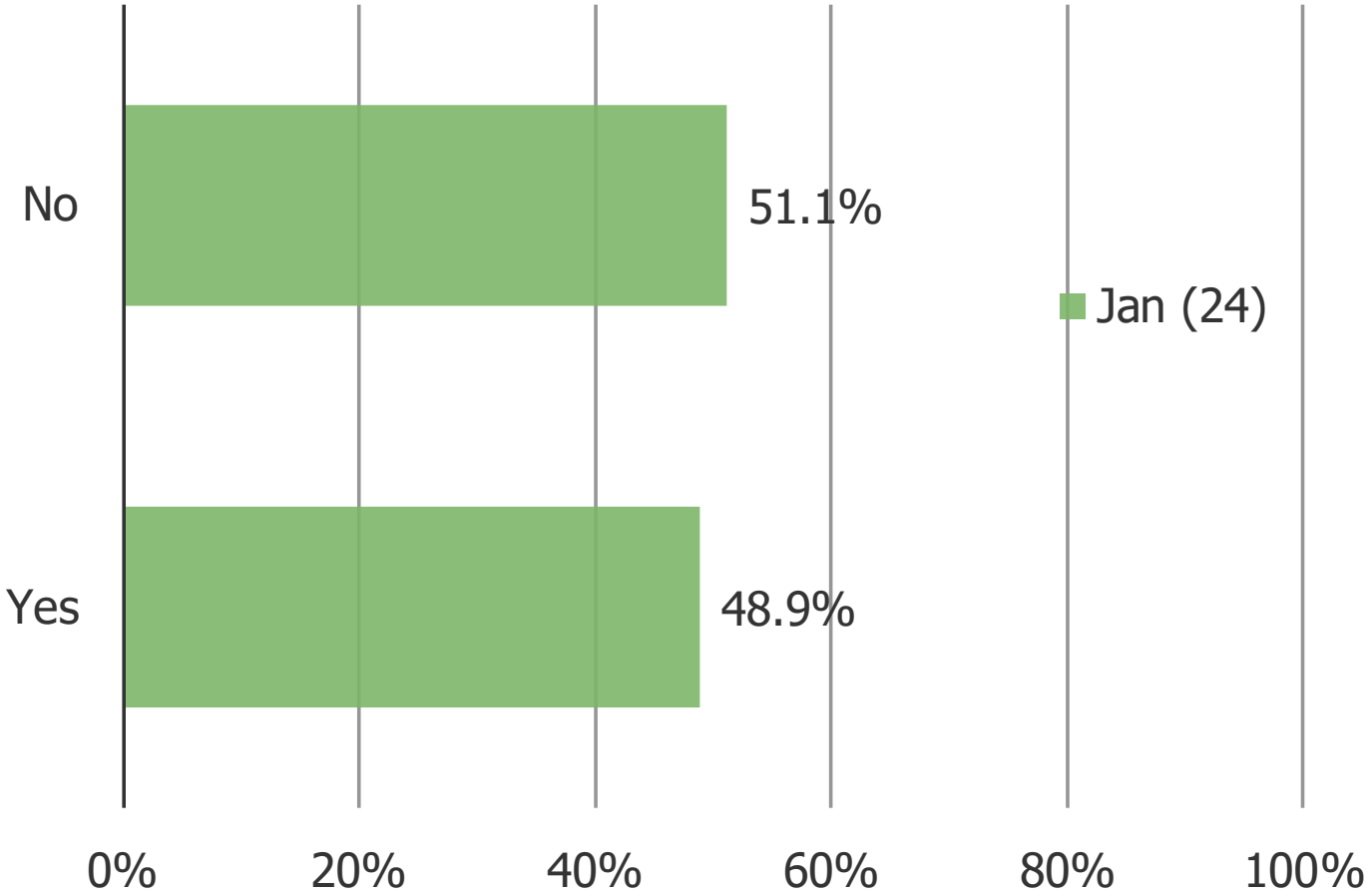
WOULD CHARACTERIZE YOURSELF AS GETTING...

This question was posed to respondents who have purchased jewelry from Pandora in the past year. (N=176)



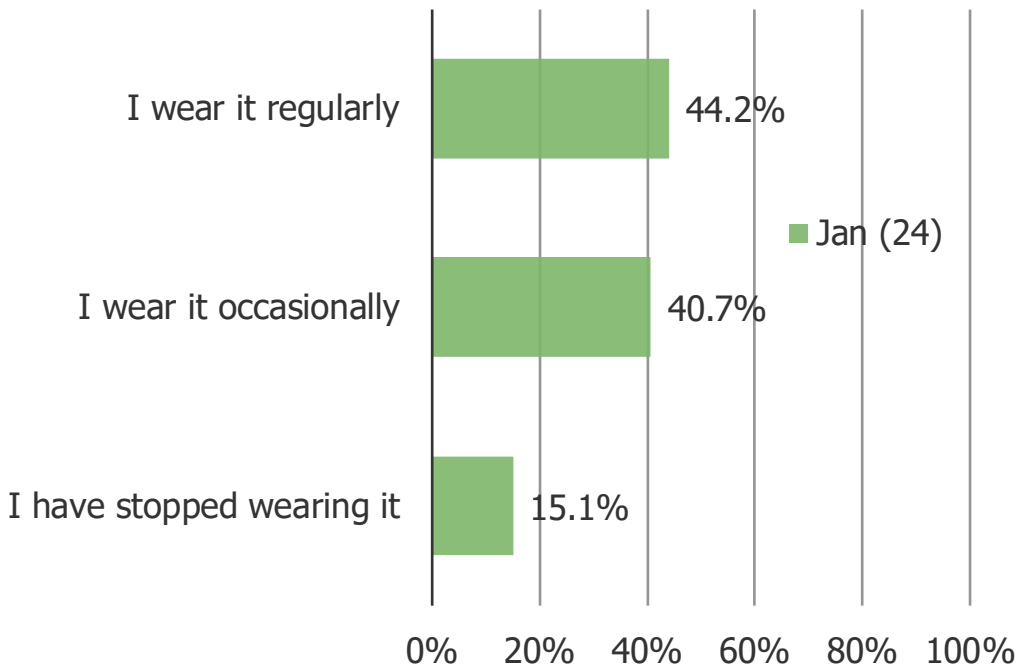
HAVE YOU EVER PURCHASED OR RECEIVED ANY PANDORA CHARM JEWELRY?

This question was posed to respondents who have purchased jewelry from Pandora in the past year. (N=176)



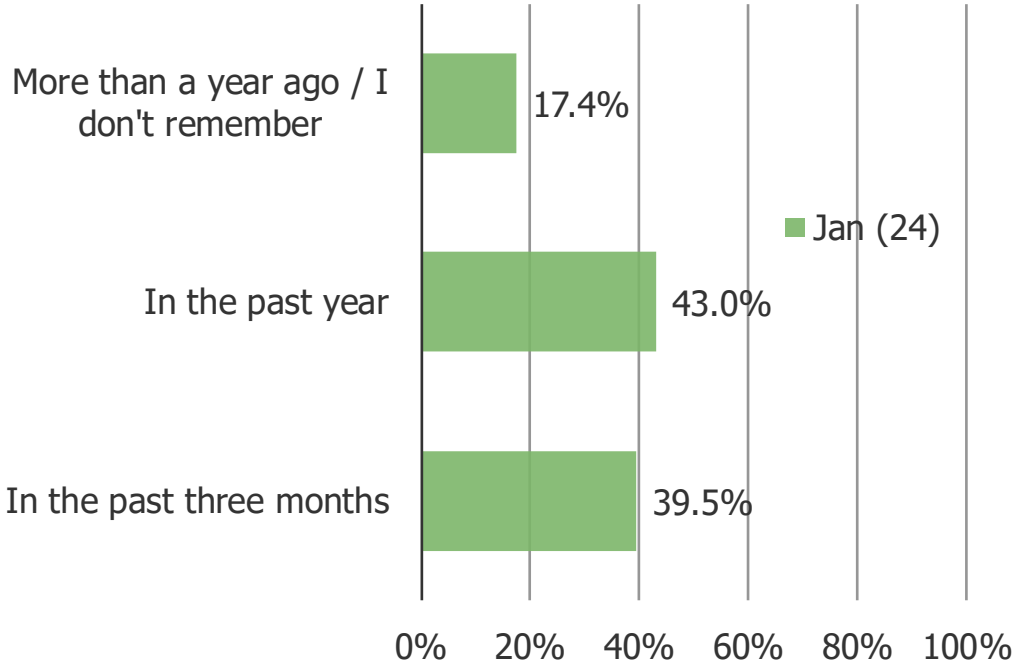
DO YOU STILL WEAR YOUR PANDORA CHARM JEWELRY?

This question was posed to respondents who have purchased charm jewelry from Pandora in the past year. (N=86)



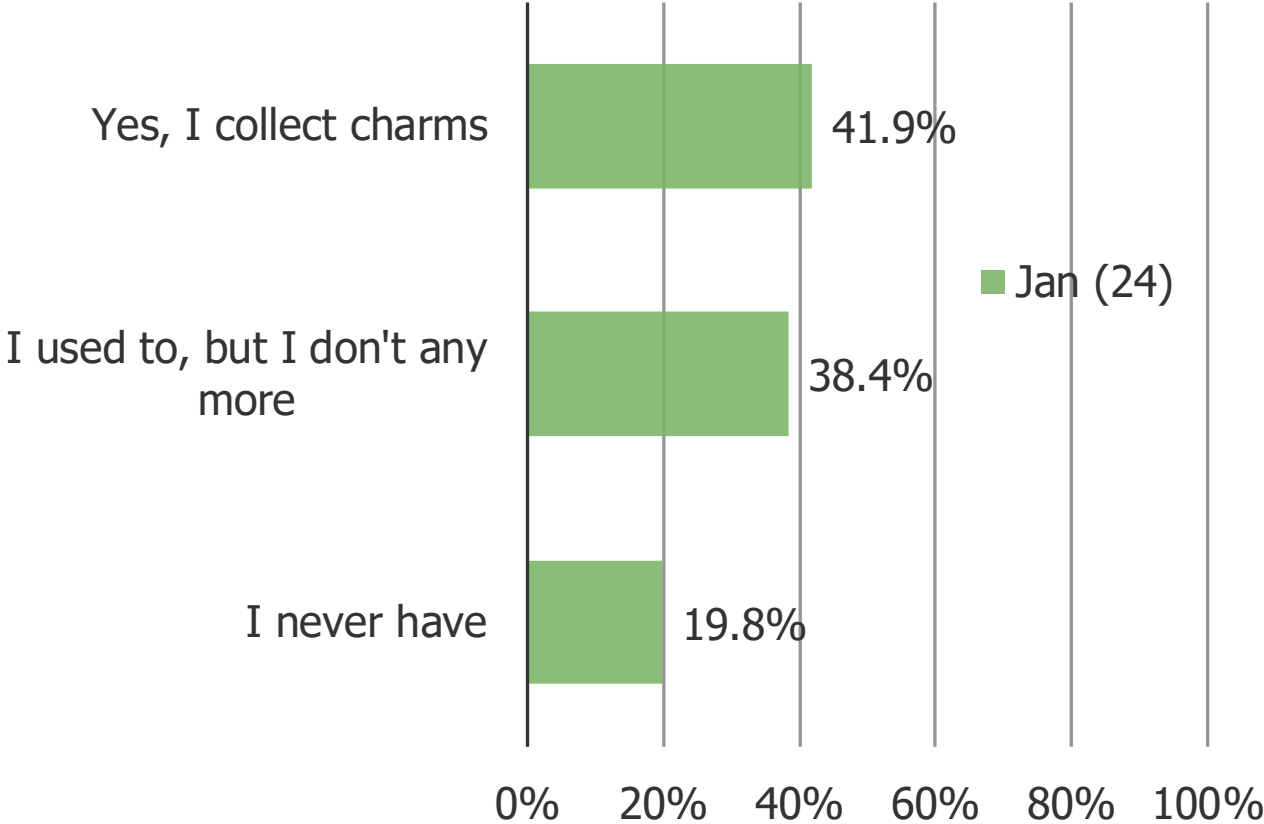
WHEN IS THE LAST TIME YOU BOUGHT OR RECEIVED PANDORA CHARM JEWELRY?

This question was posed to respondents who have purchased charm jewelry from Pandora in the past year. (N=86)



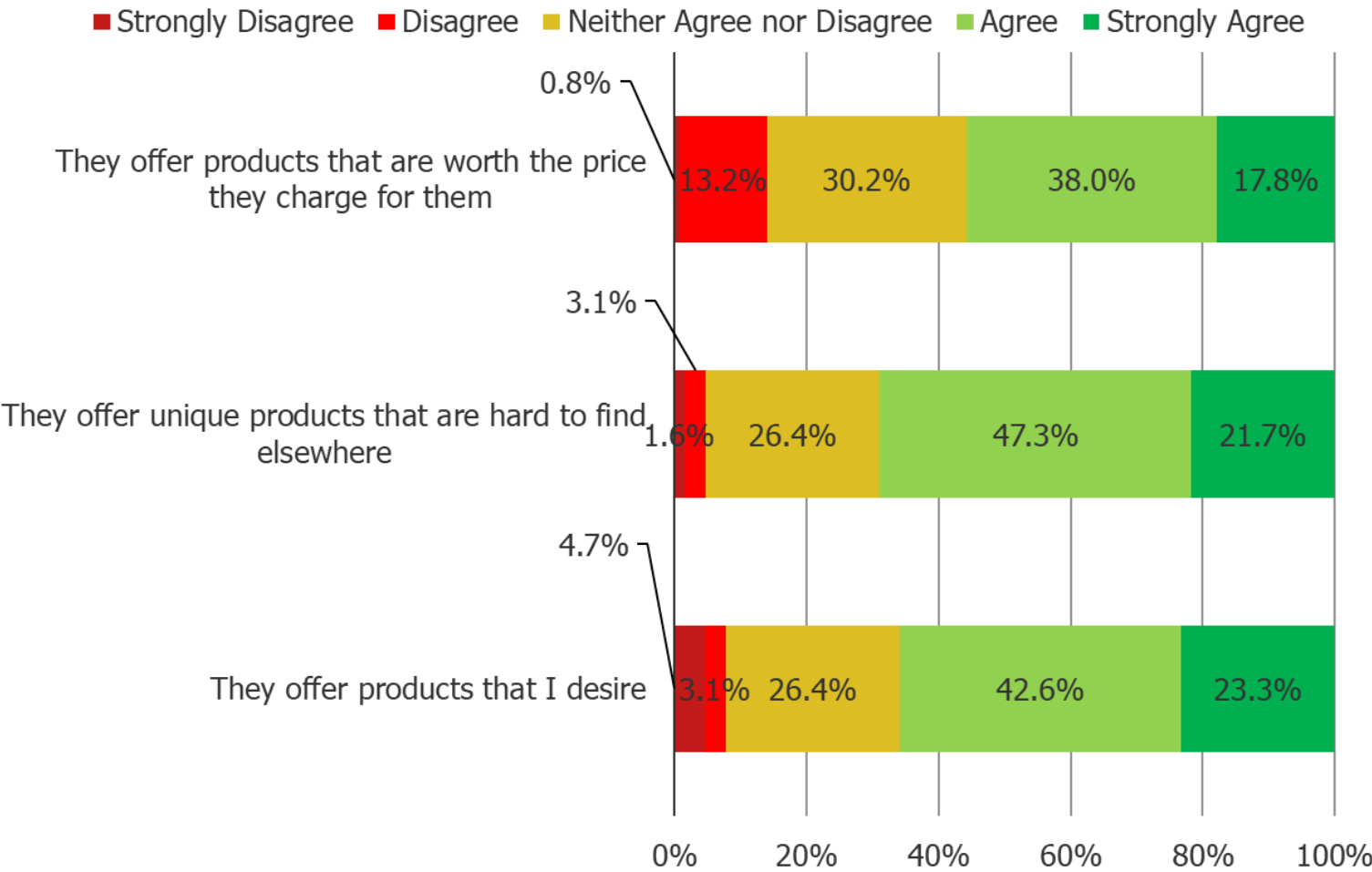
DO YOU COLLECT PANDORA JEWELRY CHARMS?

This question was posed to respondents who have purchased charm jewelry from Pandora in the past year. (N=86)



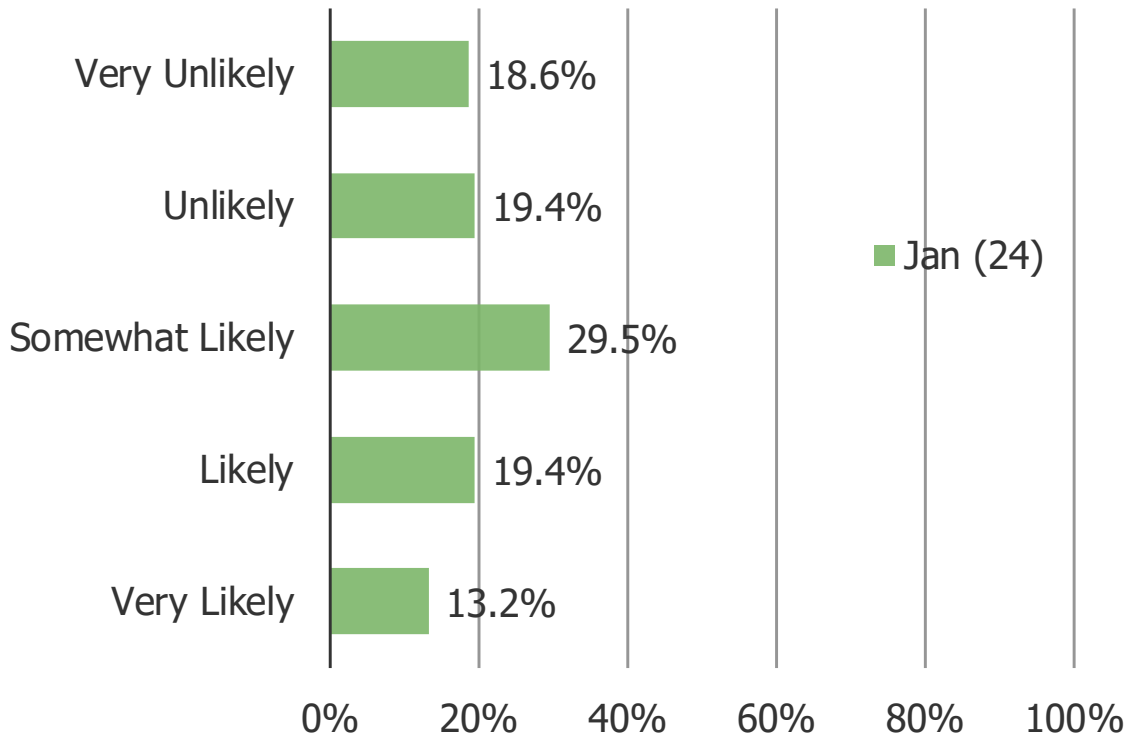
PLEASE RATE HOW MUCH YOU AGREE WITH THE FOLLOWING STATEMENTS ABOUT PANDORA JEWELRY:

This question was posed to respondents who have ever purchased jewelry from Pandora...



IF YOU NEEDED TO BUY DIAMOND JEWELRY TODAY, HOW LIKELY WOULD YOU BE TO BUY IT FROM PANDORA JEWELRY?

This question was posed to respondents who have ever purchased jewelry from Pandora...



Optional Comments:

- Pandora isn't a jewelry place that I necessarily would think to go buy a diamond feel like a lot of their are more sedimuntil and unique
- Depends on what type of jewelry and if Pandora would be able to order
- I trust in their brand and prices
- It's costume jewelry
- It's just too commercial does t seem like a good quality for diamonds
- Not known for their diamonds in my opinion
- Not noted for it
- Poor selection
- Price
- They do not have a store close to our home
- They have very little real diamonds
- too expensive