

CHAPTER

1

INTRODUCTION

INTRODUCTION TO UNITY MARKETING'S TABLETOP MARKET REPORT, 2006

RESEARCH OBJECTIVES

In mergers and acquisition, circles tabletop companies are getting a lot of scrutiny these days. Lifetime Brands, which markets housewares brands Farberware, KitchenAid, Cuisinart, Hoffritz and others, recently acquired casual dinnerware leader The Pfaltzgraff Company. Venerable Waterford Wedgwood, crystal and china brand in the luxury arena, bought up dinnerware and collectibles rival Royal Doulton. Oneida, of flatware fame and currently undergoing bankruptcy reorganization, recently sold off its Buffalo China dinnerware factory to an acquisitions group and has plans to divest its four remaining factory locations. And Lenox, the nation's number one most recognized tabletop brand, was just acquired by giftware industry leader Department 56.

These shifts highlight major changes afoot in the tabletop market as consumers shift their spending from formal china and dinnerware toward 'casual luxury' that they use frequently and enjoy regularly, not store away in cabinets and hutches. Unity Marketing has conducted a new consumer insights study targeting consumer purchases in both the tabletop mass and 'class' segments to understand purchase and shopping behavior and brand usage and preferences in tabletop, dinnerware, flatware and glassware in order to provide the most current market data for companies competing in the market today.

TABLETOP HAS BEEN A SLOW GROWTH MARKET, BUT ONE WITH LOTS OF GROWTH POTENTIAL FOR COMPANIES THAT TAP INTO THE NEW DINING EXPERIENCE

Historically, the tabletop industry has been one characterized by steady, but slow market growth. But as the consumer market is turning more experiential and people hanker after new experiences to indulge in, a need for new tabletop goods that enhance people's home dining experiences is on the rise, particularly among the luxury consumers. For example, in 2005 the

typical luxury consumer (household income of \$75,000 and above) who made purchases in the tabletop category, about 13 percent of the total sample, spent \$6,148 on average buying items in the category.

‘NEW LUXURY’ IS ABOUT THE EXPERIENCE, NOT THE THING

Just because the tabletop category has such strong appeal to the luxury consumers, that DOESN’T mean they are necessarily buying ‘luxury’ tabletop. Quite the contrary, with the new luxury consumers’ emphasis on experience, they are attracted to new types and brands of tableware products that offer new experiential attributes besides those found only in fine bone china and lead crystal.

For example, Pier 1, Pottery Barn, Crate and Barrel and many others have found a thriving market niche offering high-style casual dinnerware. For \$100 to \$200 one can set a party table with creative, designer-look and fully coordinating dishes, glasses, serving dishes, linens, centerpieces, and all the rest that are designed to enhance the moment and are strictly for the here-and-now. This is dinnerware to use and enjoy, not store away in china cabinets. It works for both everyday and special occasions as it can be dressed up for even the most elegant holiday table setting. It is fun, frivolous and total luxury — the equivalent of paper plates and cups for the luxury set.

Clearly some luxury consumers buy into the luxury fine dining paradigm when they want to set their tables only with bone china place settings that go for \$500 on up, but more and more luxury consumers with the means to spend that kind of money simply refuse to do so. They opt instead for a more liveable, experiential option. They are not interested in buying dinnerware to live with forever, but in designs they can enjoy for a season and be done with. Their focus is fashion, fun, casual and affordable. The new luxury consumers luxuriate in change and breaking out of the mold. Too much of the fine tabletop market today is frigid formality, and not enough is casual luxury.

NEW MARKETING OPPORTUNITIES ARISE AS CONSUMERS’ BEHAVIOR CHANGES

Along with a trend toward new casual tabletop comes a shift in where consumers shop for and buy tabletop. As department stores lose shoppers to specialty home furnishing chains,

discounters, internet and other sources, the leading tabletop brands are finding the 'doors' they have used to reach their target market closing. They struggle with young brides who decided not to register for fine dinnerware, sterling silver and crystal stemware patterns in department stores, in favor of everyday casual patterns from retailers like Crate and Barrel. Tabletop marketers and traditional retailers need to assess the impacts of the new shopping patterns and develop strategies to meet the new shopper in her new destinations.

UNITY MARKETING'S NEW CONSUMER RESEARCH STUDY ON THE EMERGING TABLETOP MARKET

This is a report by Unity Marketing, a research firm that has been on the forefront of research in the tabletop market, designed to help companies that market to the tabletop consumer market understand the new dynamics in the marketplace.

This research study focuses on consumers who recently purchased one or more of the key tabletop categories: dinnerware, sterling and stainless flatware, crystal and glassware, tabletop servingware and decorative accessories and other tabletop accessories, such as tabletop linens, serving pieces, and others. It reveals who buys these items, what kinds of products they buy, how much they spend on their tabletop purchases, and how they use, display and store these items.

Along with researching consumers' purchase behavior, the study focuses on why people buy these products, what psychological and emotional needs they fulfill and how they use tabletop products in their lives for everyday dining, casual and formal entertaining.

In addition it investigates what brands of tabletop they are familiar with and what brands they actually buy. Both brand awareness and usage for top tabletop brands are the subject of research.

With the focus on the consumer, their needs, desires and preferences, Unity Marketing's research study included focus groups to find out what issues are of prime importance when shopping for and buying fine and casual tabletop and a quantitative research survey among 1,303 recent buyers to understand their tabletop purchase behavior, spending, shopping patterns and brand preferences.

A special emphasis in the research is to understand the different lifestages surrounding the tabletop market. From young brides, young marrieds and those raising children to empty-nesters, consumers exhibit different needs and preferences for tabletop at different stages of their life. Insights from this lifestage perspective can enhance how marketers approach the different generational segments in the market with products designed uniquely for their lifestage needs.

SPECIAL FEATURE: THE BRIDAL MARKET FOR TABLETOP

Because of the importance of the bridal market to tabletop marketers, this research study includes a special section devoted to brides. A focus group was conducted among recent brides and engaged women to understand their preferences and desires for tabletop in their gift registries. The findings will challenge tabletop company executives that view the bridal market as the secret of their company's future marketing success. (See Chapter 7)

CONSUMER INSIGHTS ON THE MARKET FOR CASUAL AND FORMAL TABLETOP

With a focus on consumers, their buying behavior, needs, desires and preferences, this research study includes research data and statistics about:

- **Tabletop Market Size and Growth:** What is the size of the overall tabletop goods market, as well as the key product segments (e.g. dinnerware, glassware, flatware, decorative accessories, servingware) and how rapidly is it growing? How is the tabletop market segmented by type of product? What is the size of the formal and casual tabletop segments?
- **Demographics of the Tabletop Market:** What are the demographic characteristics of people who buy tabletop products? How is consumers' buying behavior for tabletop influenced by demographic segments (e.g., gender, age, generation, household income (HHI), size, composition, ethnicity/race, education, etc.)?
- **Tabletop Buying Behavior:** What are the primary characteristics of the consumers' buying behavior related to tabletop goods in general and the key product segments in particular (e.g. dinnerware, glassware, flatware, decorative accessories, servingware)? Why do they buy these goods and how do consumers'

motivations different by product category segment? Where do they shop for the different types of tabletop products; what factors influence their decision making; how much do they spend buying each of the tabletop goods product segments and across the entire tabletop goods category?; what is the role of brand in tabletop goods product selection and shopping choices? How do different demographic segments differ in their shopping and buying behavior?

- **Psychographic Profile and Segmentation of the Tabletop Markets:** A psychographic profile of the four types of tabletop buyers is developed in this report. The profiles identify four different types or personalities of consumers of tabletop goods — Casual Carol; Formerly-Formal Frances; Neo-Conservative Conrad/Connie; Helena the Hostess with the Mostest. These profiles identify different drives and motivations found among consumers in purchasing tabletop; what factors are more or less important in driving tabletop purchasing decisions; and how tabletop marketers and retailers can better understand the hearts and minds of their consumers. In essence, we will discover “why people buy tabletop.”

METHODOLOGY

This report is based upon findings from both qualitative and quantitative research.

FOCUS GROUP RESEARCH

Focus groups were conducted during August/September 2005 in Atlanta, GA; Schaumburg, IL (Chicago suburb); and Columbus, OH (Bridal group). In Atlanta and Schaumburg, two focus groups were held with one group recruited from active casual tabletop buyers, called our casual dominant group, and the other from active formal tabletop buyers, called our formal dominant group. In addition, respondents recruited for Atlanta groups were screened to be 40 or younger and respondents recruited for Schaumburg were recruited to be 40 and older. This provides two generational perspectives on the tabletop market, with the younger groups being of the GenXer generation primarily and the older groups being Baby Boomers primarily.

One bridal group was conducted among recent brides (married in past two years) or engaged brides. These respondents had to have registered for tabletop items in their bridal registry.

Here are the average ages for each focus group:

- Bridal, 32.6 years (GenXer generation)
- Casual Atlanta, 32.1 years (GenXer)
- Casual Schaumberg, 48.3 years (Baby Boomer)
- Formal Atlanta, 32.6 years (GenXer)
- Formal Schaumberg, 50.7 years (Baby Boomer)

A total of 61 women were recruited for the focus groups with household incomes of \$50,000 or more, except for the bridal group where no income range was specified.

For the casual and formal groups, respondents were recruited who purchased one or more of the following in the past six months (from September 2004 to present): Casual and/or Formal dinnerware; glassware, barware or stemware; flatware; servingware for dining/entertainment; or tabletop accents, such as bowls, candlesticks, platters, etc. All respondents in the casual group had to have bought casual tabletop in the past six months and all respondents in the formal group had to have bought formal tabletop in the past six months; however, they didn't have to exclusively have bought casual to be in the casual group or formal to be in the formal group. In other words, the casual buyers could also have bought formal and the formal buyers could also have bought casual. About half of the respondents in each group bought in both casual and formal categories of tabletop, so there is considerable overlap in the groups.

QUANTITATIVE CONSUMER SURVEY

A consumer survey of a representative sample of 1,002 U.S. consumers was conducted with questions focused on their purchases of tabletop products, shopping behavior, and the motivations that drove those purchase (i.e. why people buy), including:

- **Dinnerware**, such as dinner plates, bowls, salad and bread plates, five-piece place setting, boxed sets of four or more place settings, etc. In

addition, style of dinnerware purchased was also recorded including everyday, casual lifestyle (e.g. better than everyday but more casual than formal dinnerware), and formal style (i.e. fine china for special occasions);

- **Glassware, Crystal, Barware**, such as drinking glasses, glass stemware, crystal stemware, glass and crystal barware, etc.;
- **Flatware**, such as stainless steel flatware and serving utensils, sterling silver flatware and serving utensils, five piece place settings, boxed sets of four or more place settings, etc.;
- **Servingware and Tabletop Decorative Accessories**, such as serving pieces, such as bowls, platters, etc. made out of porcelain, ceramic, stoneware, glassware, crystal, fine china, stainless steel, sterling silver; or tabletop decorative accessories, such as figurines, vases, candlesticks, made out of porcelain, ceramic, stoneware, glassware, crystal, fine china, stainless steel, sterling silver; and
- **Other tabletop accessories**, such as table linens, such as napkins, placemats, table cloths, kitchen linens, and decorative centerpieces.

Survey respondents were screened for their purchase of any of the above tabletop goods in the past 12 months, from February 2005 to March 2006. A total of 2,410 respondents (average household income of \$69,300 (slightly about the national U.S. household income average) were surveyed as to their purchases of the above products. Out of the total 2,410 respondents surveyed, approximately 54 percent or 1,303 respondents, made purchases of any of these products in the past year and so answered the in-depth survey questionnaire. The survey was conducted during March 2006 using an electronic internet-based survey platform. A copy of the survey questionnaire is included in the appendix of this report.

Total Tabletop Purchase Incidence

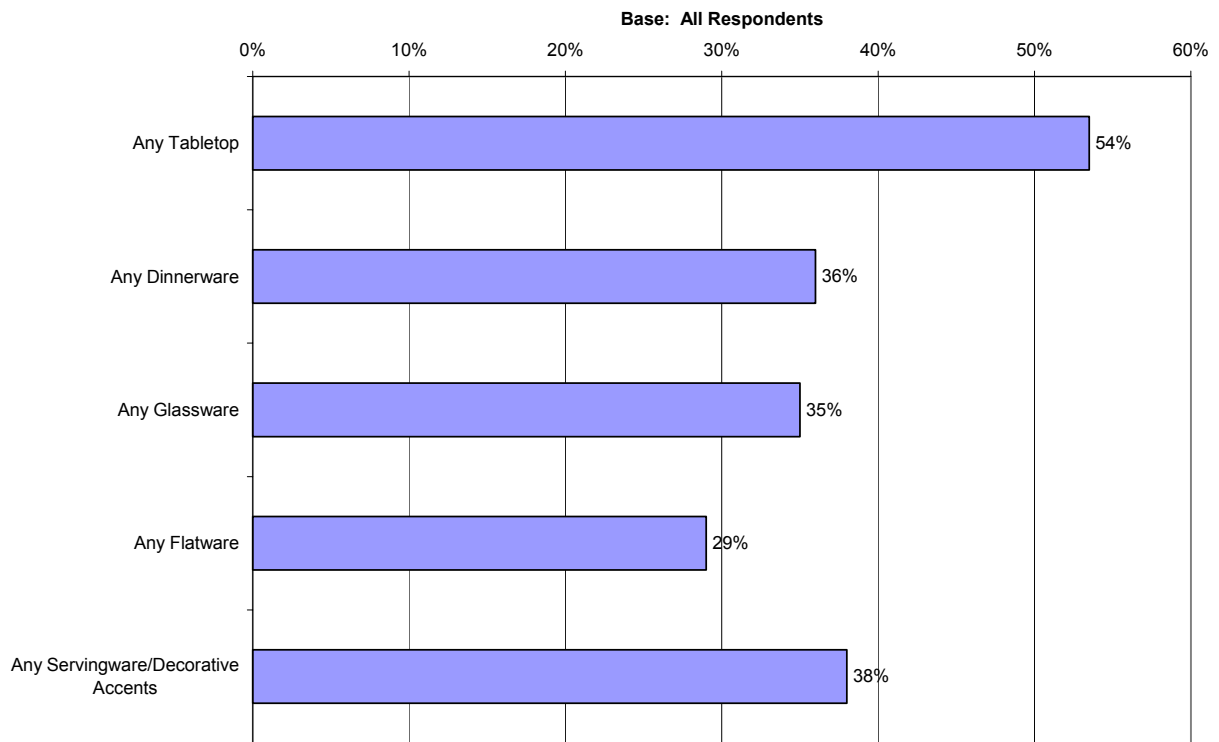


Figure 1: Total Tabletop Purchase Incidence

TABLETOP BUYER SAMPLE DEMOGRAPHICS

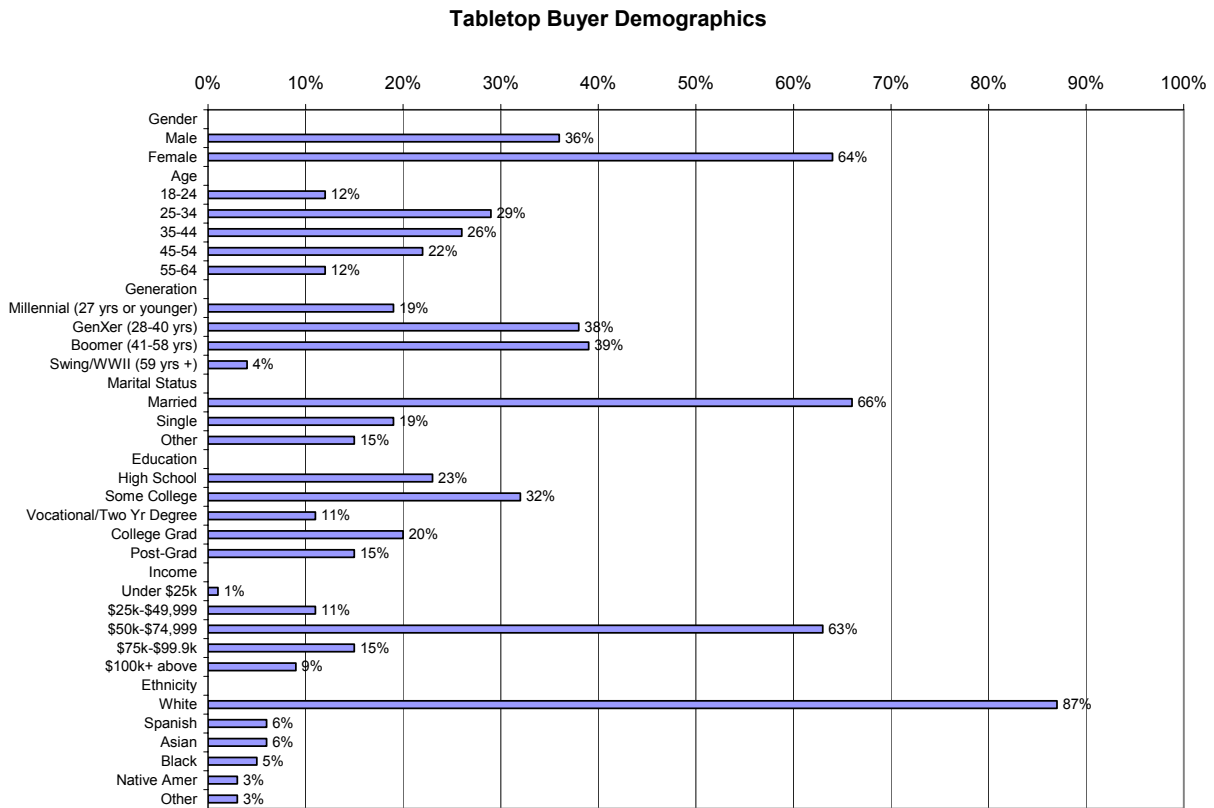


Figure 2: Tabletop Buyer Demographics

Not unexpectedly, the survey sample of tabletop goods purchasers skewed female with 64 percent being women and 36 percent men. The average age of survey respondents was 39.5 years old with ages 25-to-34 making up the plurality of respondents (29 percent). Two-thirds of those surveyed were married. The average household income was \$69,300, slightly above the national household income average, with the majority of respondents' incomes falling in the \$50,000 to \$74,999 range. Higher income households, \$75,000 and above, accounted for 24 percent of the sample and lower income under \$50,000 were 12 percent of the total sample.

APPENDIX A: TABLETOP CONSUMER SURVEY QUESTIONNAIRE

TABLETOP BUYERS SURVEY QUESTIONNAIRE

1. In the past 12 months, from **February 2005** until today, what type or types of tabletop products did you purchase for yourself, purchase as a gift, or both?

1-As a gift for someone else

2-For yourself

3-For yourself and as a gift

4-Don't Know/No

1-Dinnerware (*such as dinner plates, bowls, salad and bread plates, etc.*)

2-Glassware, Crystal, Barware (*such as drinking glasses, stemware, barware, etc.*)

3-Flatware (*such as forks, knives, spoons, etc.*)

4-Serving Pieces and/or Tabletop Decorative Accessories (*such as serving bowls, platters, trays, vases, figurines, candlesticks, etc.*)

{IF "DON'T KNOW/NO" IN Q1 - TERMINATE

2. How many complete matching sets (*e.g. four or more complete place settings*) of the following tabletop collections do you own?

1-1 Only

2-2 complete sets

3-3 complete sets

4-4 complete sets

5-5 complete sets

6-6 to 10 complete sets

7-11 or more complete sets

8-No matching set

Dinnerware

1-Everyday Dinnerware (*i.e. suited for everyday use*)

2-Casual Lifestyle (*i.e. better than everyday, but more casual than formal*)

3-Formal Style (*i.e. fine china, porcelain for special occasions*)

Flatware

4-Stainless Steel Flatware

- 5-Silver-Plate Flatware
- 6-Sterling Silver Flatware
- Glassware**
- 7-Crystal Stemware

{IF "NO MATCHING SET" FOR "FORMAL STYLE" IN Q2 SKIP Q3}

3. Are you using your **formal style dinnerware** more, less than or about the same today as you did two years ago?

- 3-More
- 2-About the Same
- 1-Less Than

{IF "NO MATCHING SET" FOR "STERLING SILVER FLATWARE" IN Q2 SKIP Q4}

4. Are you using your **sterling silver flatware** more, less than or about the same today as you did two years ago?

- 3-More
- 2-About the Same
- 1-Less Than

{FOR ALL...

5. Do you collect or are you a collector of any of the following types of tabletop items?

(Please select all that you collect):

- 1-Cups-and-saucers
- 2-Figurines
- 3-Vases
- 4-Plates
- 5-Candlesticks
- 6-Salt-and-pepper
- 7-Bowls
- 8-None of the above

{About Last Purchase

6. Thinking about your most recent tabletop purchase, was your purchase made:

- 1-As a gift for someone else
- 2-For yourself
- 3-For self and as gift
- 4-Don't Know

7. What type or types of tabletop products did you purchase on your most recent shopping trip?

(Please check all that apply.)

- 1-**Dinnerware** *(such as dinner plates, bowls, salad and bread plates, etc.)*
- 2-**Glassware, Crystal, Barware** *(such as drinking glasses, stemware, barware, etc.)*
- 3-**Flatware** *(such as forks, knives, spoons, etc.)*
- 4-**Serving Pieces and/or Tabletop Decorative Accessories** *(such as serving bowls, platters, trays, vases, figurines, candlesticks, etc.)*
- 5-**Other Tabletop Accessories** *(such as linens, tablecloths, place mats, etc.)*
- 6-Don't Know

{IF "DINNERWARE" IN Q7 ASK Q8 & Q9

8. What kind of **Dinnerware** did you buy on your most recent shopping trip?

(Please check all that apply.)

- Dinnerware** 1-Five piece place setting
- 2-Boxed set of four or more place settings
- 3-Individual plates, bowls, mugs, etc.
- 4-Other dinnerware items

9. What style of **Dinnerware** did you purchase?

- (Please check all that apply.)*
- 1-Everyday style *(i.e. suited for everyday use)*
 - 2-Casual lifestyle *(i.e. better than everyday but more casual than formal)*
 - 3-Formal style *(i.e. fine china, crystal, silver for special occasions)*
 - 4-Don't Know

14. How much did you spend on your last purchase of **Dinnerware** *(such as dinner plates, bowls, salad and bread plates, etc.)*?

- (For multiple items purchased in category most recently, please report total amount spent in specific category.)*
- 1-Under \$10
 - 2-\$11-\$25
 - 3-\$26-\$50
 - 4-\$51-\$100
 - 5-\$101-\$249
 - 6-\$250-\$499
 - 7-\$500-\$999
 - 8-\$1,000-\$2,499
 - 9-\$2,500 or more

15. Were any of the tabletop **Dinnerware** *(such as dinner plates, bowls, salad and bread plates, etc.)* items purchased most recently bought on sale or at a discount off the list price?

- 1-Yes
- 2-No

{IF "GLASSWARE" IN Q7 ASK Q10

10. What kind of **glassware, crystal and/or barware** did you buy on your most recent shopping trip?

(Please check all that apply.)

Glassware, Crystal, Barware

- 1-Glassware (*such as drinking glasses, juice glasses, etc.*)
- 2-Glass Stemware
- 3-Glass Barware
- 4-Crystal Stemware (*such as wine glasses, water glasses, etc.*)
- 5-Crystal Barware
- 6-Other Glassware Items
- 7-None of the above

16. How much did you spend on your last purchase of **Glassware, Crystal, Barware** (*such as drinking glasses, stemware, barware, etc.*)?

(For multiple items purchased in category most recently, please report total amount spent in specific category.)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

17. Were any of the tabletop **Glassware, Crystal, Barware** (*such as drinking glasses, stemware, barware, etc.*) items purchased most recently bought on sale or at a discount off the list price?

- 1-Yes
- 2-No

{IF "FLATWARE" IN Q7 ASK Q11

11. What kind of **flatware** did you buy on your most recent shopping trip?

(Please check all that apply.)

- Flatware**
- 1-Stainless Steel five-piece place settings (*e.g. knife, fork, salad fork, spoon, soup spoon, etc.*)
 - 2-Stainless Steel boxed set of four or more place settings
 - 3-Stainless Steel flatware serving utensils (*such as ladles, serving forks, serving spoons, cake knife, etc.*)
 - 4-Sterling Silver five-piece place settings
 - 5-Sterling Silver boxed set of four or more five piece place settings
 - 6-Sterling Silver flatware serving utensil (*such as ladles, serving forks, serving spoons, cake knife, etc.*)
 - 7-Other flatware pieces (*such as cheese knives, aperitif forks, etc.*)

18. How much did you spend on your last purchase of **Flatware** (such as forks, knives, spoons)?

(For multiple items purchased in category most recently, please report total amount spent in specific category.)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

19. Were any of the tabletop **Flatware** (*such as forks, knives, spoons*) items purchased most recently bought on sale or at a discount off the list price?

- 1-Yes
- 2-No

{IF "SERVING PIECES AND TABLETOP DECORATIVE ACCESSORIES" IN Q7 ASK Q12

12. What kind of **Serving pieces and tabletop decorative accessories** did you buy on your most recent shopping trip?

(Please check all that apply.)

Serving Pieces and Tabletop Decorative Accessories

- 1-Glassware serving pieces (*such as bowls, platters, etc.*)
- 2-Glassware decorative accents (*such as figurines, vases, candlesticks, etc.*)
- 3-Crystal serving pieces (*such as bowls, platters, etc.*)
- 4-Crystal decorative accents (*such as figurines, vases, candlesticks, etc.*)
- 5-Porcelain, ceramic, stoneware serving pieces (*such as bowls, platters, etc.*)
- 6-Porcelain, ceramic, stoneware decorative accents (*such as figurines, vases, candlesticks, etc.*)
- 7-Fine China serving pieces (*such as bowls, platters, etc.*)
- 8-Fine China decorative accents (*such as figurines, vases, candlesticks, etc.*)
- 9-Stainless Steel serving pieces (*such as bowls, platters, etc.*)
- 10-Stainless Steel decorative accents (*such as figurines, vases, candlesticks, etc.*)
- 11-Sterling silver serving pieces (*such as bowls, platters, etc.*)
- 12-Sterling silver decorative accents (*such as figurines, vases, candlesticks, etc.*)
- 13-Other serving pieces
- 14-Other decorative accents
- 15-Don't Know

20. How much did you spend on your last purchase of **Serving Pieces and/or Tabletop Decorative Accessories** (such as serving bowls, platters, trays, vases, figurines, candlesticks, etc.)?

(For multiple items purchased in category most recently, please report total amount spent in specific category.)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

21. Were any of the tabletop **Serving Pieces and/or Tabletop Decorative Accessories** (*such as serving bowls, platters, trays, vases, figurines, candlesticks, etc.*) items purchased most recently bought on sale or at a discount off the list price?

- 1-Yes
- 2-No

{IF "OTHER TABLETOP ACCESSORIES" IN Q7 ASK Q13

13. What kind of **Other tabletop accessories** did you buy on your most recent shopping trip?

(Please check all that apply.)

Other Tabletop Accessories

- 1-Table Linens (*such as placemats, napkins, table clothes, etc.*)
- 2-Kitchen Linens (*such as towels, etc.*)
- 3-Decorative centerpieces
- 4-Other

22. How much did you spend on your last purchase of **Other Tabletop Accessories** (*such as linens, tablecloths, place mats, etc.*)?

(For multiple items purchased in category most recently, please report total amount spent in specific category.)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

23. Were any of the **Other Tabletop Accessories** (*such as linens, tablecloths, place mats, etc.*) items purchased most recently bought on sale or at a discount off the list price?

- 1-Yes

2-No

{For all recent buyers ask...

24. What were the primary reasons why you made your most recent tabletop purchases?

*(Please check up to **three reasons.**)*

- 1-Price/Value Relationship
- 2-Style and Design
- 3-For Party or Special Event
- 4-Excellent Quality
- 5-Favorite Material
- 6-Favorite Color
- 7-Matches Decor
- 8-Add to Existing Collection of Tableware
- 9-Perfect Gift
- 10-Discounted Price
- 11-Favorite Brand or Designer
- 12-Replace a Broken, Worn Out or Lost Item
- 13-Impulse Purchase
- 14-Gift for Myself/Special treat
- 15-Like to Collect
- 16-Other Reasons not mentioned above

25. In what kind of store did you make your last tabletop purchase? *(Please select one.)*

- 1-Home specialty stores including furniture and home furnishings stores *(such as Pier 1, Linens 'n Things, Bed, Bath & Beyond, Pottery Barn, Crate and Barrel, Kirklands, IKEA, Ethan Allen or local furniture stores, etc.)*
- 2-Specialty Kitchen/Tabletop Store *(such as Williams-Sonoma, etc.)*
- 3-Traditional department stores *(such as JC Penneys, Sears, Dillards, Marshall Fields, Macys, etc.)*
- 4-Discount stores including warehouse clubs, dollar stores, and discount department merchants *(such as Wal-Mart, Kmart, Target, Sam's Club, Kohls, TJ Maxx, dollar stores and other discount department stores, etc.)*
- 5-Jewelry Stores *(such as Bailey, Banks & Biddle, Zales, Whitehall, Kay's, etc.)*
- 6-Specialty Gift Stores, including small independent gift shops or chain stores *(such as Hallmark, Carlton Cards, etc.)*
- 7-Home Shows, Party Demonstrations *(such as PartyLite, Longaberger, Pampered Chefs, etc.)*
- 8-Non-store retailers, including internet sites, mail order catalogs, direct home sales or TV shopping channels *(such as HSN, QVC or infomercials)*
- 9-Grocery Stores *(such as Acme, Albertsons, Safeway, Trader Joes, Publix, Giant, etc.)*
- 10-Outlet Store or Company Outlet Store *(such as Lenox Outlet, Waterford Wedgwood Outlet store, Mikasa Outlet, Pfaltzgraff Outlet, etc.)*
- 11-Other Store not indicated above

26. Before making your most recent tabletop purchase, did you shop around to compare items and/or prices?

- 1-Yes
- 2-No

{About past year's Tabletop Purchases

200. Aside from your most recent shopping trip to purchase tabletop items, did you make any other purchases of tabletop items in the past year?

- 1-Yes
- 2-No

27. Thinking about all your tabletop purchases in the past year, what kind of tabletop pieces did you purchase, both for yourself and as gifts?

(Please check all that apply.)

- 1-**Dinnerware** *(such as dinner plates, bowls, salad and bread plates, etc.)*
- 2-**Glassware, Crystal, Barware** *(such as drinking glasses, stemware, barware, etc.)*
- 3-**Flatware** *(such as forks, knives, spoons, etc.)*
- 4-**Serving Pieces and/or Tabletop Decorative Accessories** *(such as serving bowls, platters, trays, vases, figurines, candlesticks, etc.)*
- 5-**Other Tabletop Accessories** *(such as linens, tablecloths, place mats, etc.)*
- 6-Don't Know

{IF "DINNERWARE" IN Q27 ASK NEXT Q

300. Within the past year, on how many different occasions did you make purchases of **Dinnerware** *(such as dinner plates, bowls, salad and bread plates, etc.)*?

- 1-One time
- 2-Two times
- 3-Three times
- 4-Four times
- 5-Five times
- 6-Six times
- 7-More than six times

28. What kind of **dinnerware** did you buy in the past year? *(Please check all that apply.)*

Dinnerware

- 1-Five piece place setting
- 2-Boxed set of four or more place settings
- 3-Individual plates, bowls, mugs, etc.
- 4-Other dinnerware items
- 5-Don't know

29. What style of **dinnerware** did you purchase?

(Please check all that apply.)

- 1-Everyday style (*i.e. suited for everyday use*)
- 2-Casual lifestyle (*i.e. better than everyday but more casual than formal*)
- 3-Formal style (*i.e. fine china, crystal, silver for special occasions*)
- 4-Don't Know

34. How much did you spend in total in the past year on purchases of **Dinnerware** (*such as dinner plates, bowls, salad and bread plates, etc.*)?

(*For multiple items purchased most recently, please report total amount spent in specific category.*)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

{IF "GLASSWARE" IN Q27 ASK NEXT Q

301. Within the past year, on how many different occasions did you make purchases of **glassware, crystal and/or barware**?

- 1-One time
- 2-Two times
- 3-Three times
- 4-Four times
- 5-Five times
- 6-Six times
- 7-More than six times

30. What kind of **glassware, crystal and/or barware** did you buy in the past year? (*Please check all that apply.*)
Glassware, Crystal, Barware

- 1-Glassware (*such as drinking glasses, juice glasses, etc.*)
- 2-Glass Stemware
- 3-Glass Barware
- 4-Crystal Stemware (*such as wine glasses, water glasses etc.*)
- 5-Crystal Barware
- 6-Other Glassware Items
- 7-None of the above

35. How much did you spend in total in the past year on purchases of **glassware, crystal and/or barware**? (*For multiple items purchased most recently, please report total amount spent in specific category.*)

- 1-Under \$10
- 2-\$11-\$25

- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

{IF "FLATWARE" IN Q27 ASK NEXT Q

302. Within the past year, on how many different occasions did you make purchases of **Flatware** (*such as forks, knives, spoons*)?

- 1-One time
- 2-Two times
- 3-Three times
- 4-Four times
- 5-Five times
- 6-Six times
- 7-More than six times

31. What kind of **flatware** did you buy in the past year?

(Please check all that apply.)

Flatware

- 1-Stainless Steel five-piece place settings (*e.g. knife, fork, salad fork, spoon, soup spoon, etc.*)
- 2-Stainless Steel boxed set of four or more place settings
- 3-Stainless Steel flatware serving utensils (*such as ladles, serving forks, serving spoons, cake knife, etc.*)
- 4-Sterling Silver five-piece place settings
- 5-Sterling Silver boxed set of four or more five piece place settings
- 6-Sterling Silver flatware serving utensils (*such as ladles, serving forks, serving spoons, cake knife, etc.*)
- 7-Other flatware pieces (*such as cheese knives, aperitif forks, etc.*)

36. How much did you spend in total in the past year on purchases of **Flatware** (*such as forks, knives, spoons*)? (*For multiple items purchased most recently, please report total amount spent in specific category.*)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

{IF "Serving Pieces and/or Tabletop Decorative Accessories" IN Q27 ASK NEXT Q

303. Within the past year, on how many different occasions did you make purchases of **Serving Pieces and/or Tabletop Decorative Accessories**?

- 1-One time
- 2-Two times
- 3-Three times
- 4-Four times
- 5-Five times
- 6-Six times
- 7-More than six times

32. What kind of **servicing pieces and tabletop decorative accessories** did you buy in the past year?

(Please check all that apply.)

Serving Pieces and Tabletop Decorative Accessories

- 1-Glassware serving pieces *(such as bowls, platters, etc.)*
- 2-Glassware decorative accents *(such as figurines, vases, candlesticks, etc.)*
- 3-Crystal serving pieces *(such as bowls, platters, etc.)*
- 4-Crystal decorative accents *(such as figurines, vases, candlesticks, etc.)*
- 5-Porcelain, ceramic, stoneware serving pieces *(such as bowls, platters, etc.)*
- 6-Porcelain, ceramic, stoneware decorative accents *(such as figurines, vases, candlesticks, etc.)*
- 7-Fine China serving pieces *(such as bowls, platters, etc.)*
- 8-Fine China decorative accents *(such as figurines, vases, candlesticks, etc.)*
- 9-Stainless Steel serving pieces *(such as bowls, platters, etc.)*
- 10-Stainless Steel decorative accents *(such as figurines, vases, candlesticks, etc.)*
- 11-Sterling silver serving pieces *(such as bowls, platters, etc.)*
- 12-Sterling silver decorative accents *(such as figurines, vases, candlesticks, etc.)*
- 13-Other serving pieces
- 14-Other decorative accents
- 15-Don't Know

37. How much did you spend in total in the past year on purchases of **Serving Pieces and/or Tabletop Decorative Accessories** *(such as serving bowls, platters, trays, vases, figurines, candlesticks, etc.)*?

(For multiple items purchased most recently, please report total amount spent in specific category.)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

{IF "Other Tabletop Accessories" IN Q27 ASK

304. Within the past year, on how many different occasions did you make purchases of **Other Tabletop Accessories** (such as linens, tablecloths, place mats, etc.)?

- 1-One time
- 2-Two times
- 3-Three times
- 4-Four times
- 5-Five times
- 6-Six times
- 7-More than six times

33. What kind of **other tabletop accessories** did you buy on your most recent shopping trip?

(Please check all that apply.)

Other Tabletop Accessories

- 1-Table Linens, such as placemats, napkins, table clothes
- 2-Kitchen Linens, such as towels, etc.
- 3-Decorative centerpieces
- 4-Other

38. How much did you spend in total in the past year on purchases of **Other Tabletop Accessories** (such as linens, tablecloths, place mats, etc.)?

(For multiple items purchased most recently, please report total amount spent in specific category.)

- 1-Under \$10
- 2-\$11-\$25
- 3-\$26-\$50
- 4-\$51-\$100
- 5-\$101-\$249
- 6-\$250-\$499
- 7-\$500-\$999
- 8-\$1,000-\$2,499
- 9-\$2,500 or more

{For each major category in Q27 — Dinnerware; Glassware, Crystal & Barware; Flatware; Serving Pieces and Tabletop Decorative Accessories; and Other Tabletop Accessories — ask...

39. In what kind of stores did you make your tabletop purchases in the past year? *(Please check all that apply.)*

- 1-Home specialty stores including furniture and home furnishings stores (such as Pier 1, Linens 'n Things, Bed, Bath & Beyond, Pottery Barn, Crate and Barrel, Kirklands, IKEA, Ethan Allen or local furniture stores)
- 2-Specialty Kitchen/Tabletop Store (such as Williams-Sonoma, etc.)
- 3-Traditional department stores (such as JC Penneys, Sears, Dillards, Marshall Fields, Macys, etc.)
- 4-Discount stores including warehouse clubs, dollar stores, and discount department merchants (such as Wal-Mart, Kmart, Target, Sam's Club, Kobl's, TJ Maxx, dollar stores and other discount department stores)
- 5-Jewelry Stores (such as Bailey, Banks & Biddle, Zales, Whitehall, Kay's, etc.)
- 6-Specialty Gift Stores, including small independent gift shops or chain stores (such as Hallmark, Carlton Cards,

etc.)

7-Home Shows, Party Demonstrations (*such as PartyLite, Longaberger, Pampered Chefs*)

8-Non-store retailers, including internet sites, mail order catalogs, direct home sales or TV shopping channels (*such as HSN, QVC, Ross Simons, infomercials*)

9-Grocery Stores (*such as Acme, Albertsons, Safeway, Trader Joes, Publix, Giant, etc.*)

10-Outlet Store or Company Outlet Store (*such as Lenox Outlet, Waterford Wedgwood Outlet store, Mikasa Outlet, Pfaltzgraff Outlet*)

11-Other Store not indicated above

40. In the past year, which of these stores did you shop for tabletop purchases in? (*Please check all that apply.*)

Department Stores

1-Bloomingdales

2-Dillards

3-JC Penney's

4-Macy's

5-Marshall Fields

6-May Department Stores

7-Neiman Marcus

8-Nordstroms

9-Other Department Store

10-None of the above

41.

Home Furnishings Stores

1-Bed Bath & Beyond

2-Crate & Barrel

3-IKEA

4-Linens & Things

5-Pier One

6-Pottery Barn

7-Williams Sonoma

8-Other Home Furnishings Store

9-None of the above

42.

Discount Stores

1-Costco

2-Kmart

3-Kohls

4-Marshalls

5-Sam's Club

6-Target

7-TJ Maxx

8-Wal-Mart

9-Other Discount Store

10-None of the above

43.

Luxury Retailers

- 1-Bacarrat
- 2-Tiffany's
- 3-Other Luxury Retailers
- 4-None of the above

44.

Tabletop Specialty or Outlet Stores

- 1-Lenox Store
- 2-Waterford/Wedgwood Store
- 3-Mikasa
- 4-Pfaltzgraff
- 5-Other Tabletop Specialty or Outlet Store
- 6-None of the above

45.

Television/Mail Order/Internet

- 1-QVC
- 2-HSN
- 3-Ross-Simons
- 4-NBC Shop
- 5-Blue Nile.com
- 6-Amazon.com
- 7-Other Television/Mail Order Source
- 8-None of the above

46. Did you shop at any of the stores in the past year because of a gift registry or gift registration?

- 1-Yes
- 2-No

47. How important or unimportant are each of the following factors when choosing a store to shop for tabletop purchases?

- 5-**Very Important**
- 4-**Somewhat Important**
- 3-**Neither Important/Unimportant**
- 2-**Somewhat Unimportant**
- 1-**Not Important**

- 1-Helpfulness of Staff/Attention to My Needs
- 2-Convenience of Store
- 3-Quality of Merchandise

- 4-Brands carried
- 5-Wide Selection of Merchandise
- 6-Good Prices for Merchandise
- 7-Knowledge of Sales Staff/Information Provided

48.

- 5-**Very Important**
- 4-**Somewhat Important**
- 3-**Neither Important/Unimportant**
- 2-**Somewhat Unimportant**
- 1-**Not Important**

- 1-Trust in the Store
- 2-Place where I like to shop for other things besides tabletop
- 3-Pleasant environment for shopping
- 4-Store offers special loyalty/rewards program
- 5-Special sale/attractive discounts offered
- 6-Impulse purchase; just happened to see
- 7-Good return policy
- 8-Other Reasons Not Mentioned Above

49. From the following list of tabletop brands, including dinnerware, flatware, serving pieces and tabletop decorative accessories, for the past year please indicate all of the brands you are aware of but have not purchased, those brands which you purchased, and those that you are not aware of:

- 1-**Aware of Brand, But Have Not Purchased**
- 2-**Purchased Brand**
- 3-**Neither Aware Nor Purchased Brand**

- 1-Baccarat
- 2-Belleek
- 3-Christofle
- 4-Corelle
- 5-Dansk
- 6-Daum
- 7-Demdaco
- 8-Fitz & Floyd
- 9-Gorham
- 10-Haviland
- 11-Herend
- 12-International
- 13-Johnson Brothers
- 14-Kirk Steiff
- 15-Kosta Boda
- 16-Lalique
- 17-Lenox
- 18-Lladro

100. 1-**Aware of Brand, But Have Not Purchased**

2-Purchased Brand

3-Neither Aware Nor Purchased Brand

- 1-Lunt
- 2-Mikassa
- 3-Noritake
- 4-Oneida
- 5-Pfaltzgraff
- 6-Portmeiron
- 7-Reed & Barton
- 8-Riedel
- 9-Royal Doulton
- 10-Royal Worcester
- 11-Shannon
- 12-Spode
- 13-Studio Nova
- 14-Swarovski
- 15-Towle
- 16-Villeroy & Bosch
- 17-Waterford
- 18-Wedgwood

{IF PURCHASED ANY BRANDS IN Q49 ASK Q50

50. Was the selection of any of the tabletop brands you purchased in the past year influenced by a gift registry?

- 1-Yes
- 2-No

{Trends

51. In the coming year, do you expect to spend more than, less than, or the same buying tabletop purchases?

- 3-More than
- 2-About the same
- 1-Less than

{Attitudinals

52. Please indicate how strongly you agree or disagree with each of the following statements:

- 5-Strongly Agree**
- 4-Somewhat Agree**
- 3-Neither Agree or Disagree**
- 2-Somewhat Disagree**
- 1-Strongly Disagree**

1-I received formal dinnerware when I got married, but I rarely use it and keep it mostly in the china cabinet

or in storage

2-Formal dinnerware doesn't fit my lifestyle

3-When I entertain, I prefer to set my table with upscale but casual dinnerware that is easy to care for and that I can put in the dishwasher

4-Food tastes better on a fine china plate, so I set my table often with formal china

5-I don't like to use my formal tabletop because I am afraid that it might break

6-My lifestyle is more casual, so I prefer to set my table with more casual, less formal tableware

7-There used to be only two types of tableware: everyday and formal; but today there is something in between that is better than everyday but more casual than formal

8-I like to use special holiday dishes to set a festive table for holiday dinners and entertaining

9-I like to buy dinnerware open stock so I can select the specific items that I want, rather than having to buy a set that the manufacturer put together in advance

53.

5-Strongly Agree

4-Somewhat Agree

3-Neither Agree or Disagree

2-Somewhat Disagree

1-Strongly Disagree

1-I have several sets of dinnerware so I can set my table with different looks depending on the occasion

2-When I got married, I didn't want formal china, but selected more casual dinnerware; formal china didn't fit my lifestyle

3-I like to mix-and-match my table settings, using pieces from different sets with different patterns but that work well together

4-The pattern of china I selected when I got married just doesn't appeal to me any longer; my tastes have changed

5-I prefer a simple, elegant design in tableware, something that is classic that I can dress up or dress down depending upon the occasion

6-If I were to buy a five-piece place setting of formal china, one of the first things I would do is get rid of the cups and saucers and look for mugs to match; people much prefer to drink from a mug than a cup and saucer

7-Tabletop items make good gifts so I tend to shop for them when I have a gift to give

8-I plan on passing down my collection of tabletop to my children and grandchildren

9-Formal china fits my lifestyle today so I like to shop for more formal tableware

10-I like to set my table with fine sterling silver flatware when I entertain or for special occasions

54. The following final questions will be used for classification purposes only.

What is your gender?

1-Male

2-Female

55. Please select your age group:

1-Under 18 **[TERMINATE]**

2-18-24

3-25-29

4-30-34

5-35-39

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- 6-40-44
- 7-45-54
- 8-55-64
- 9-65+

56. Please indicate your total annual household income before taxes:

- 1-Less than \$25,000
- 2-\$25,000 to \$49,999
- 3-\$50,000 to \$74,999
- 4-\$75,000 to \$99,999
- 5-\$100,000 to \$149,000
- 6-\$150,000 or more