



TOUS

RESEARCH REPORT

TOUS

MARCH 2018 | Brand Vision



VISION



CONTENT

- Purchase experience among jewelry customers
- TOUS brand metrics, perception, purchase experience
- TOUS advertising effectiveness
- Competitors: brand metrics analysis



METHODOLOGY

DESCRIPTION

Method	CAWI (Computer Assisted Web Interviewing)
Periodicity	1 time
Interview duration	25 min
Geography	Russia 100 000+
Sample	1200 respondents + 150 respondents, aware of TOUS brand

SAMPLE DESIGN*

Gender	M- 30%, F- 70%
Age	18-55 y.o.
Regions	Moscow-25%, Saint-Petersburg- 25%, other – 50%
Purchase experience	Bought jewelry for last 12 months
Income	Average and higher

* Sample design is based on soc-dem distribution of jewelry customers (Mediascope M-Index 2017)

MAIN OBJECTIVES

Evaluation of the brand's position on key brand metrics, including awareness, purchase, loyalty



Description of Target Audience in terms of consumption habits and attitude towards the brand



Identification of brand strengths and weaknesses

SUMMARY

TOUS customers' portrait

Wide audience 18-55 with core 25-44 year olds. Young group aged 18-24 has big interest to the brand, group aged 25-44 has high purchase power and intention to buy and recommend the brand to others.

TOUS customers are practical, get pleasure from shopping. It is more typical for them to visit prestigious shops, be price sensitive and be influenced by celebrities.

Media consumption: TV and Internet have high cover. Social media: Facebook, VK, Instagram (the most typical is Pinterest)

Brand's strengths

- Design
- Unique style
- Fits the youth
- Corresponds to modern trends
- Looks like products people want to buy
- Positive impression of TOUS logo
- High conversion in purchase and loyalty

Brand's weaknesses

- Low brand metrics: awareness, purchase, loyalty
- Assortment
- Price
- not expensive image among those who are unaware of the brand
- Childish style
- Strange/unclear logo among those who are unaware of the brand
- Image of not prestigious, high quality brand

	Awareness		Purchase		Loyalty
All	10%	29%	3%	35%	1%
18-24	13%	62%	8%	38%	3%
Aware of brand	100%	31%	31%	35%	12%
Covered by Ad	51%	63%	32%	44%	14%

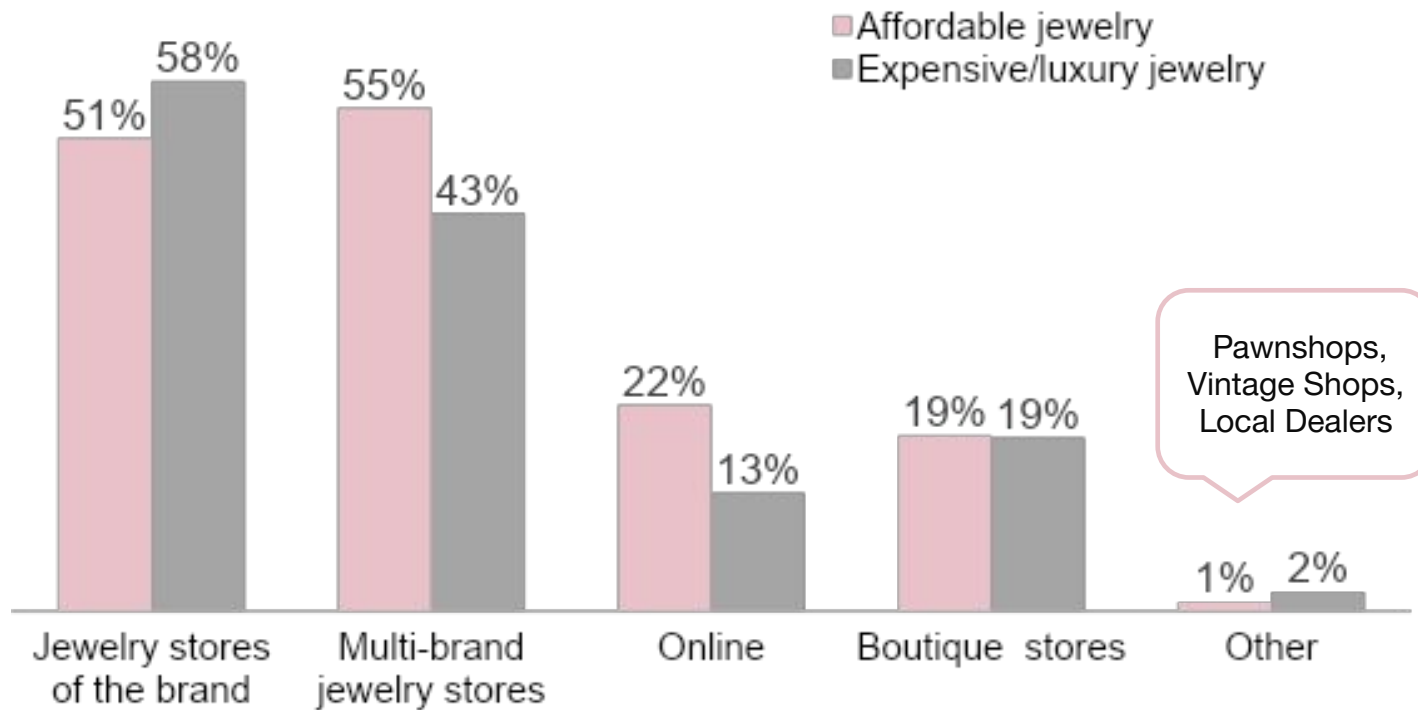
**PURCHASE EXPERIENCE
AMONG JEWELRY
CUSTOMERS**





Customers prefer to buy jewelry in mono- and multi-branded offline stores. Online shopping is more popular for affordable jewelry. Youth buy online more often

HOW DO YOU SHOP FOR JEWELRY?



AFFORDABLE JEWELRY

	Jewelry stores of the brand	Multi-brand jewelry stores	Online	Boutique stores	Other
18-24	60%	56%	36%	19%	1%
25-34	55%	51%	24%	24%	1%
35-44	49%	61%	18%	17%	1%
45-55	41%	53%	14%	13%	1%

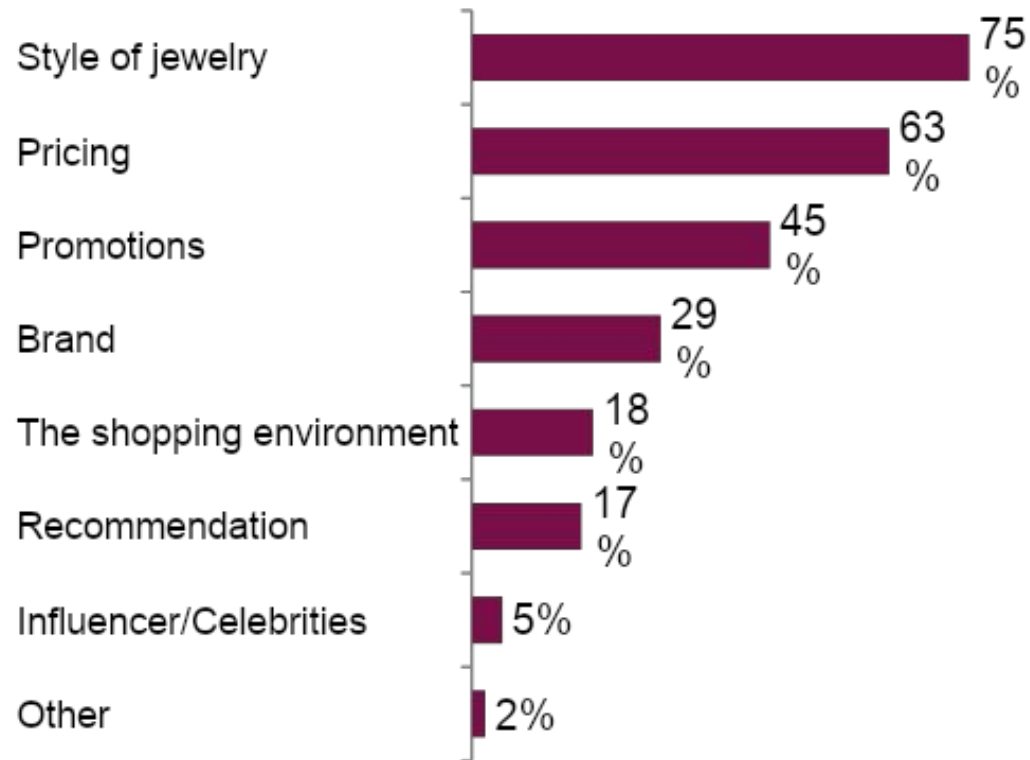
LUXURY JEWELRY

	Jewelry stores of the brand	Multi-brand jewelry stores	Online	Boutique stores	Other
18-24	71%	34%	16%	17%	2%
25-34	59%	44%	13%	21%	0%
35-44	57%	45%	12%	21%	4%
45-55	44%	47%	11%	13%	3%



Style and price are the main influencers for making decision during jewelry purchasing

OVERALL, WHAT HAS AN INFLUENCE ON YOUR DECISION TO BUY JEWELRY?

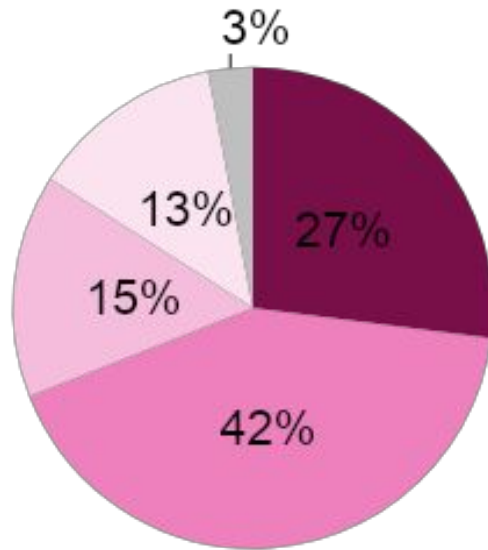


	Style of jewelry	Pricing	Promotions	Brand	The shopping environment	Recomm endation	Influencer/ Celebrities	Other
M	72%	65%	37%	31%	16%	24%	4%	3%
F	76%	62%	48%	27%	19%	13%	5%	2%
18-24	82%	74%	54%	31%	23%	25%	4%	0%
25-34	76%	64%	43%	28%	16%	17%	5%	2%
35-44	76%	58%	41%	34%	21%	15%	7%	1%
45-55	66%	58%	48%	21%	14%	10%	1%	5%
Moscow	71%	62%	46%	25%	18%	15%	6%	2%
Saint-P.	76%	65%	49%	32%	19%	14%	3%	1%
Regions	77%	63%	42%	29%	18%	19%	4%	3%



Merchandising influences customers' intention to buy things

WHEN YOU ARE SHOPPING IN A STORE, HOW INFLUENTIAL IS VISUAL MERCHANDISING IN MOTIVATING YOU TO MAKE A PURCHASE?



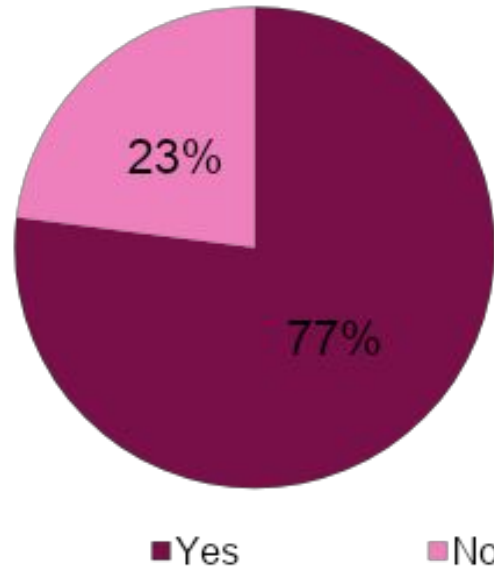
- Extremely influential
- Somewhat influential
- Neither influential, nor not influential
- Somewhat not influential
- Not at all influential

	Extremely influential	Somewhat influential	Neither influential nor not influential	Somewhat not influential	Not influential at all
18-24	27%	40%	17%	14%	2%
25-34	29%	42%	14%	12%	3%
35-44	27%	44%	13%	12%	4%
45-55	25%	43%	14%	16%	2%



The majority would be motivated by a loyalty program

**WOULD A LOYALTY PROGRAM OF A JEWELRY BRAND
MOTIVATE YOU TO PURCHASE THAT
JEWELRY MORE OFTEN?**

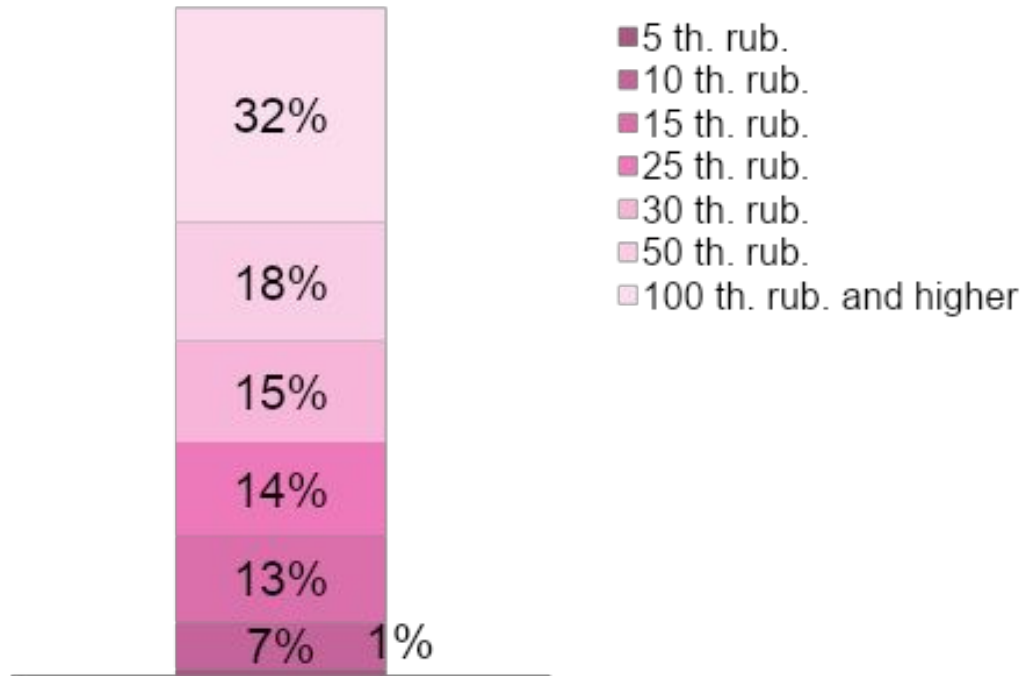


	Yes	No
M	76%	24%
F	77%	23%
18-24	77%	23%
25-34	79%	21%
35-44	75%	25%
45-55	76%	24%
Moscow	80%	20%
Saint-P.	81%	19%
Regions	74%	26%



Half of the customers consider the jewelry to be too expensive if it costs 50 th. rub or more

SPECIFY WHAT IS THE PRICE LIMIT FOR JEWELRY THAT YOU CONSIDER TOO HIGH?

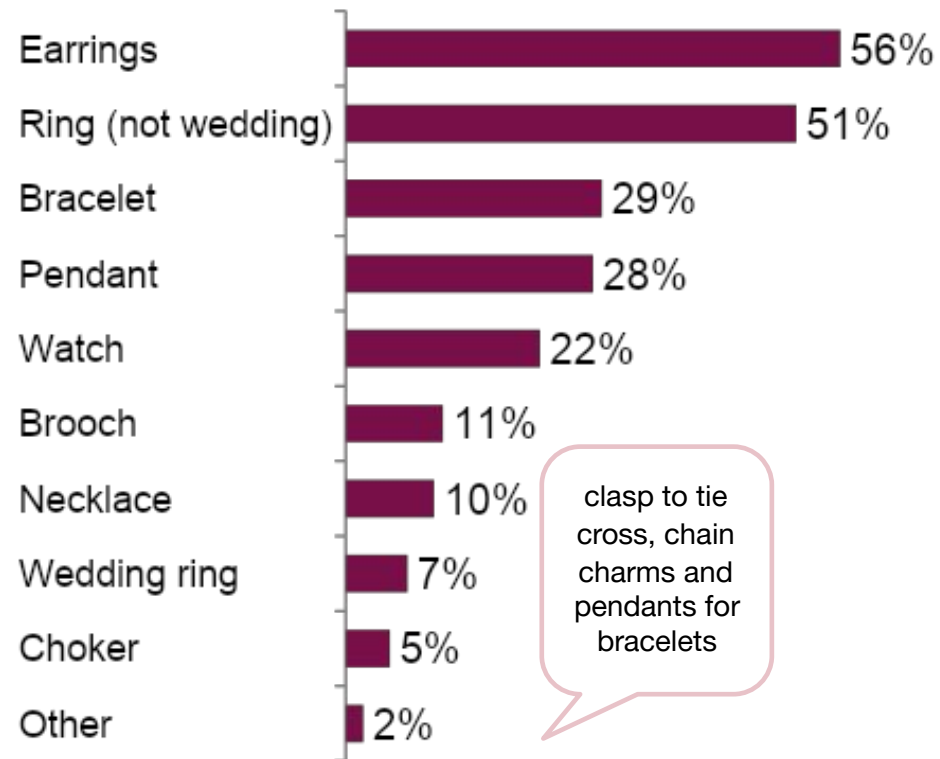


	5 th. rub.	10 th. rub.	15 th. rub.	25 th. rub.	30 th. rub.	50 th. rub.	100 th. rub. and higher
18-24	0%	9%	18%	13%	14%	23%	23%
25-34	0%	4%	12%	17%	13%	16%	38%
35-44	1%	10%	9%	15%	15%	19%	31%
45-55	2%	7%	18%	8%	17%	19%	29%
Moscow	1%	6%	12%	11%	15%	19%	36%
Saint-P.	1%	8%	17%	15%	15%	16%	28%
Regions	0%	6%	12%	20%	14%	20%	29%



Earrings and rings are the most popular items to buy

WHAT JEWELRY/EXPENSIVE BIJOUTERIE HAVE YOU PURCHASED IN THE LAST 12 MONTHS?

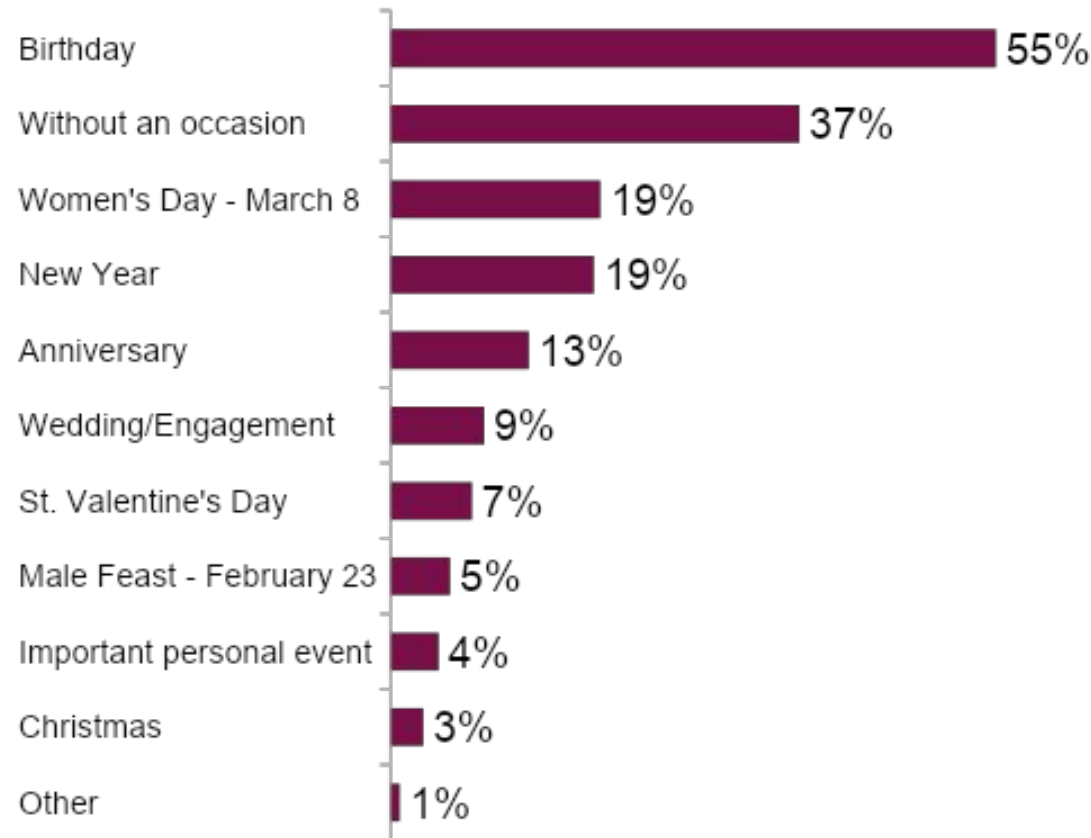


	Earrings	Ring (not wedding)	Bracelet	Pendant	Watch	Brooch	Necklace	Ring wedding	Necklace -choker
M	54%	53%	30%	22%	34%	12%	14%	9%	4%
F	56%	50%	29%	30%	17%	11%	9%	6%	5%
18-24	55%	50%	30%	28%	32%	11%	12%	7%	13%
25-34	58%	54%	31%	28%	24%	11%	11%	9%	6%
35-44	58%	46%	30%	27%	17%	11%	10%	8%	3%
45-55	49%	53%	24%	28%	16%	13%	8%	0%	1%
Moscow	53%	49%	25%	28%	20%	12%	12%	5%	5%
Saint-P.	59%	51%	31%	26%	24%	13%	9%	7%	6%
Regions	55%	52%	30%	29%	22%	10%	10%	8%	5%

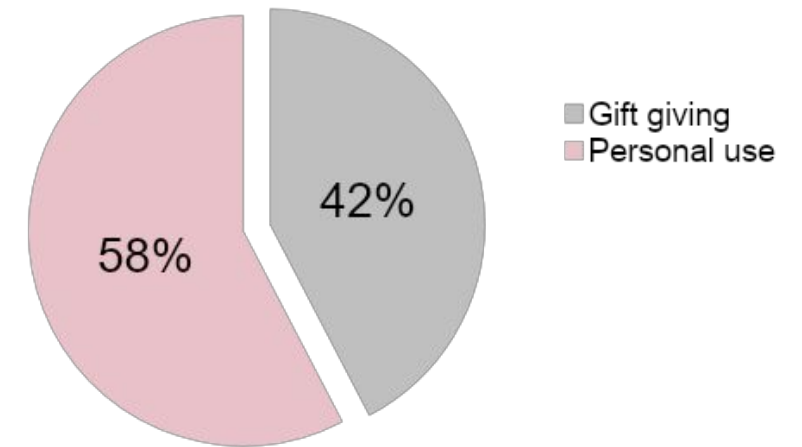


The audience buys jewelry more often for themselves.
 The most popular event to buy jewelry as a gift is a birthday

FOR WHAT EVENT HAVE YOU PURCHASED JEWELRY/EXPENSIVE BIJOUTERIE IN THE LAST 12 MONTHS?



DO YOU BUY JEWELRY MORE OFTEN FOR PERSONAL USE OR FOR GIFT GIVING?

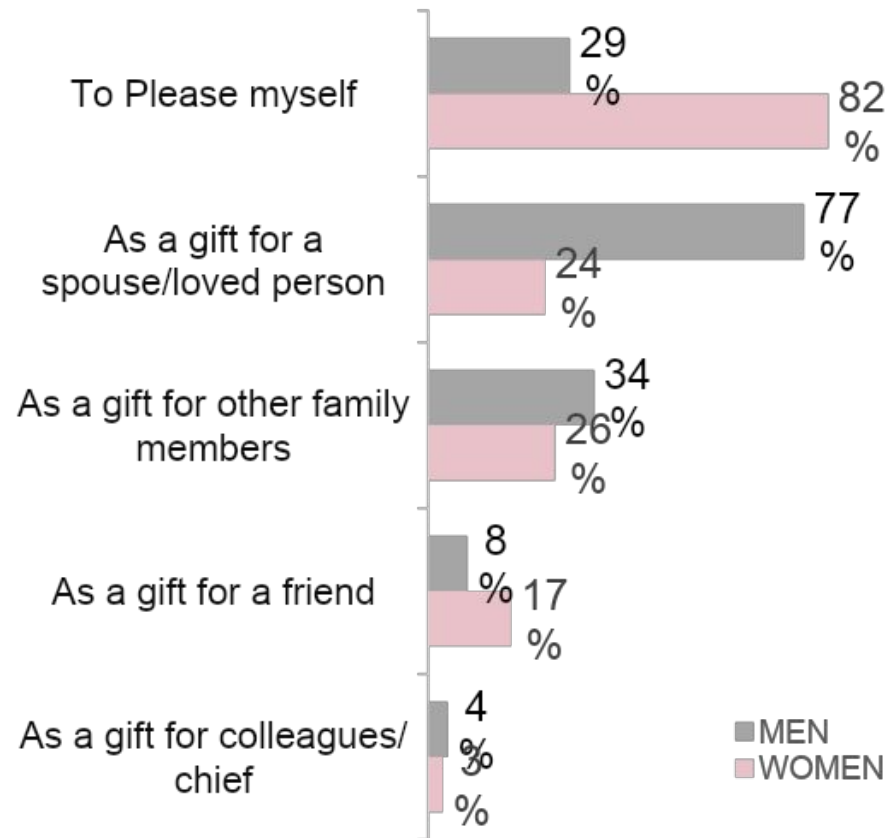


	Personal use	Gift giving
M	11%	89%
F	76%	24%



Women often buy jewelry to please themselves, men – as a gift for a spouse

FOR WHAT PURPOSE HAVE YOU PURCHASED JEWELRY/EXPENSIVE BIJOUTERIE IN THE LAST 12 MONTHS?

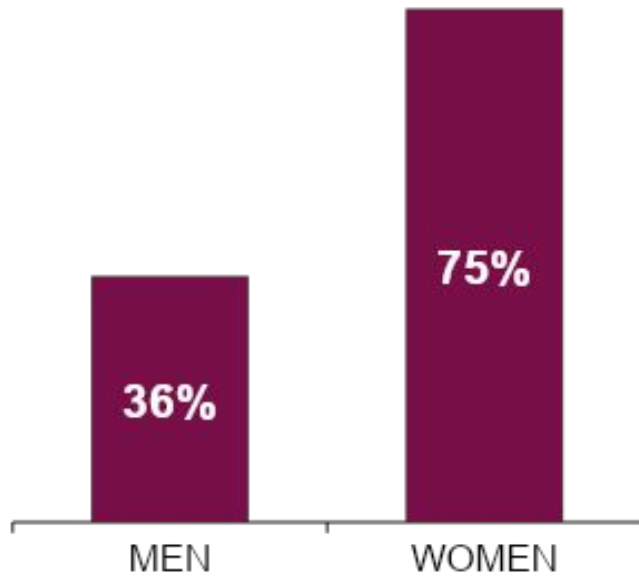


	To Please myself	As a gift for a spouse/loved person	As a gift for other family members	As a gift for a friend	As a gift for colleagues/ chief	Other
18-24	73%	36%	31%	14%	2%	0%
25-34	67%	42%	29%	19%	5%	1%
35-44	66%	41%	25%	13%	2%	1%
45-55	63%	35%	28%	8%	3%	0%
Moscow	67%	41%	23%	16%	4%	0%
Saint-P.	67%	41%	30%	15%	5%	1%
Regions	67%	37%	30%	13%	3%	1%

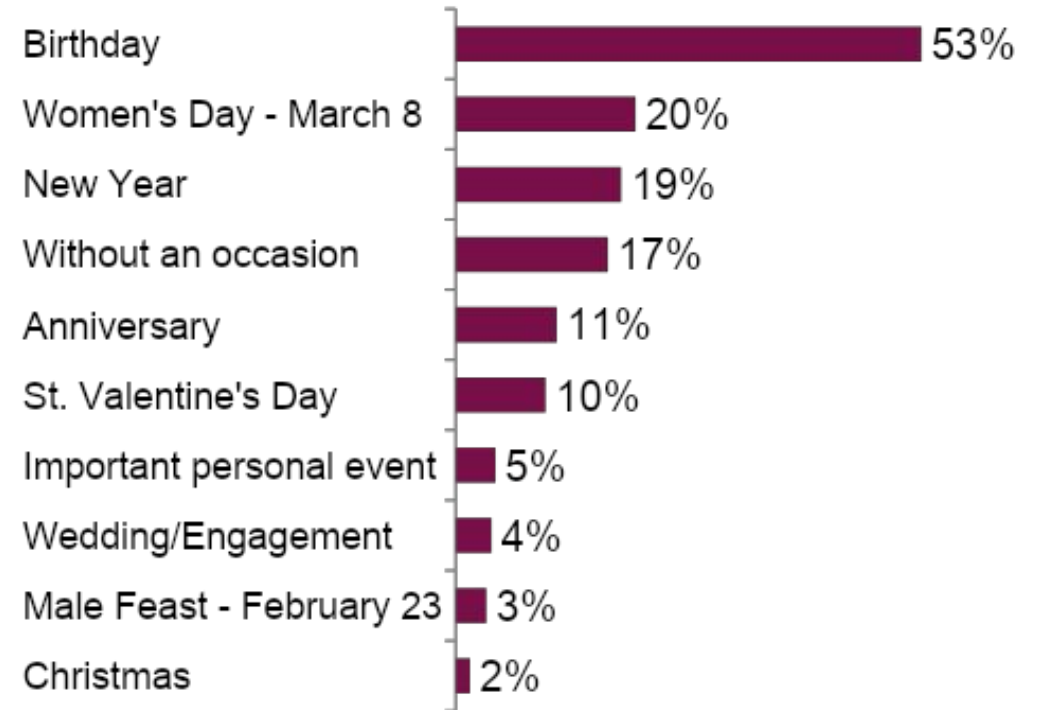


75% of women and 36% of men have received jewelry as a gift. More than a half got jewelry as a present for a birthday

HAVE YOU RECEIVED JEWELRY AS A GIFT IN THE LAST 12 MONTHS?



	Yes	No
18-24	68%	32%
25-34	69%	31%
35-44	63%	37%
45-55	53%	47%



SUMMARY: PURCHASE EXPERIENCE

- Customers buy jewelry more often for themselves. Women purchase jewelry to please themselves, men buy it as a gift.
- Birthday is the most popular event to buy jewelry.
- Earrings and rings are the most popular types of purchased jewelry.
- Customers prefer to buy jewelry in mono- and multi-branded offline stores. Online shopping is more popular for affordable jewelry. Youth buy online more often.
- Style and price are the main influencers for making decision during jewelry purchasing.
- Loyalty program is a good motivator to buy things more often.

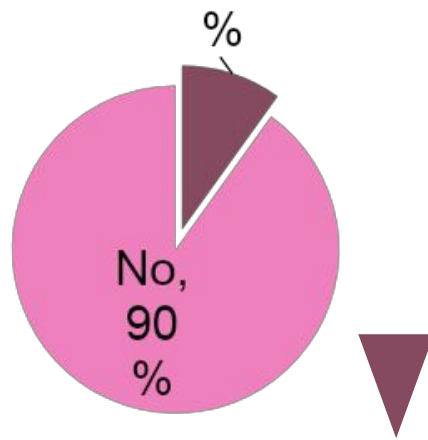
**TOUS BRAND METRICS,
PERCEPTION AND
PURCHASE EXPERIENCE**



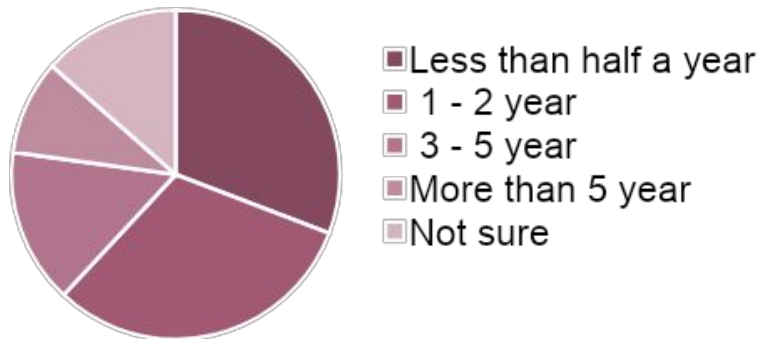


Tous awareness is 10%. More than 60% of them know the brand for less than 2 years

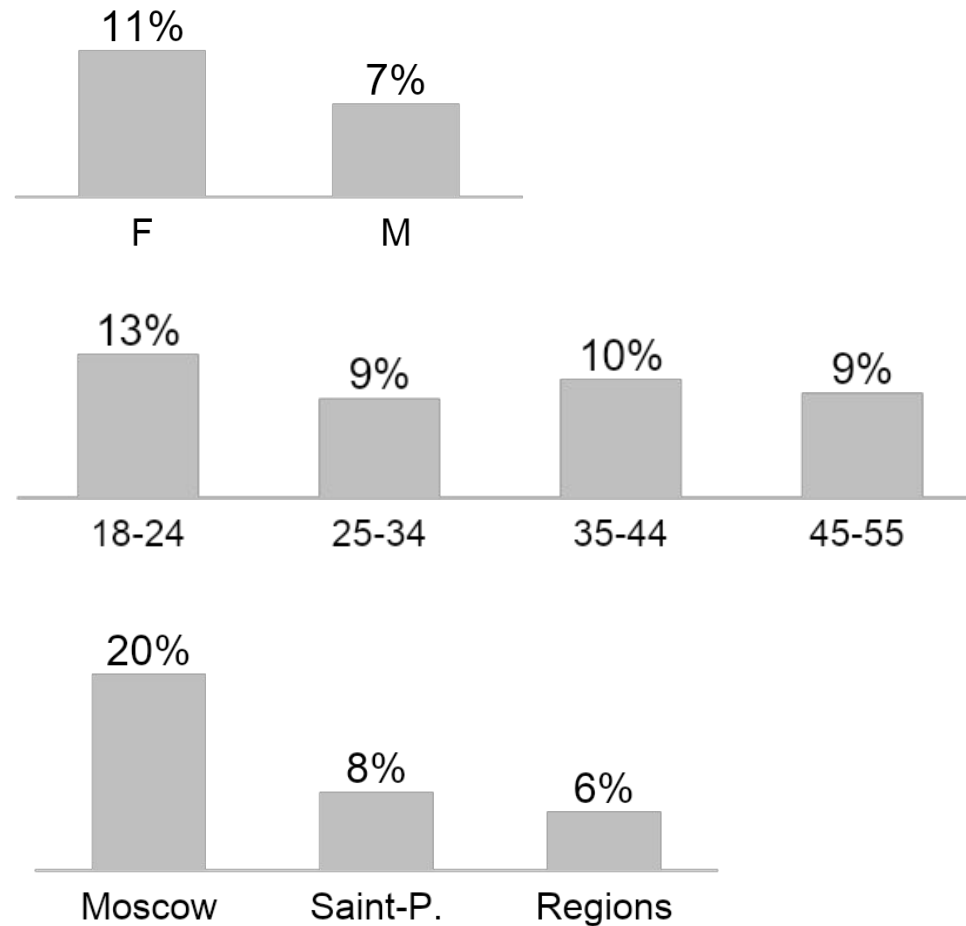
HAVE YOU HEARD OF TOUS JEWELRY?



HOW LONG HAVE YOU KNOWN TOUS JEWELRY?



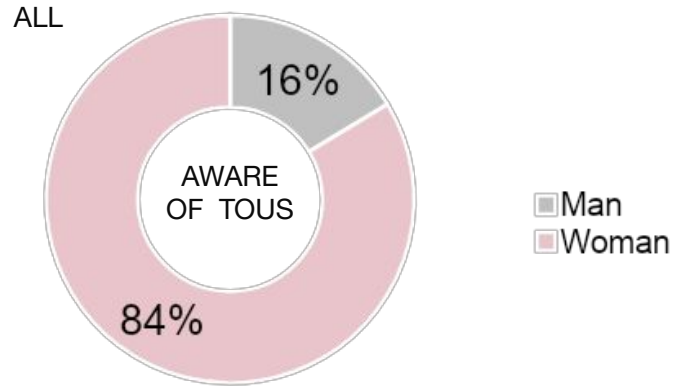
AWARENESS OF TOUS JEWELRY WITHIN SOCIO-DEMOGRAPHIC GROUPS



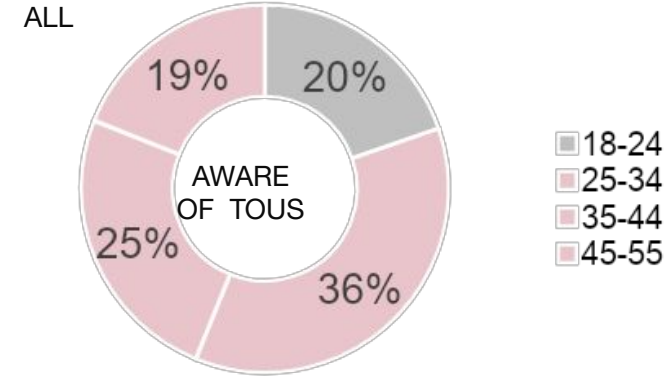


Among those who are aware of TOUS there are more women, 18-24 year olds and rich people than jewelry customers in general

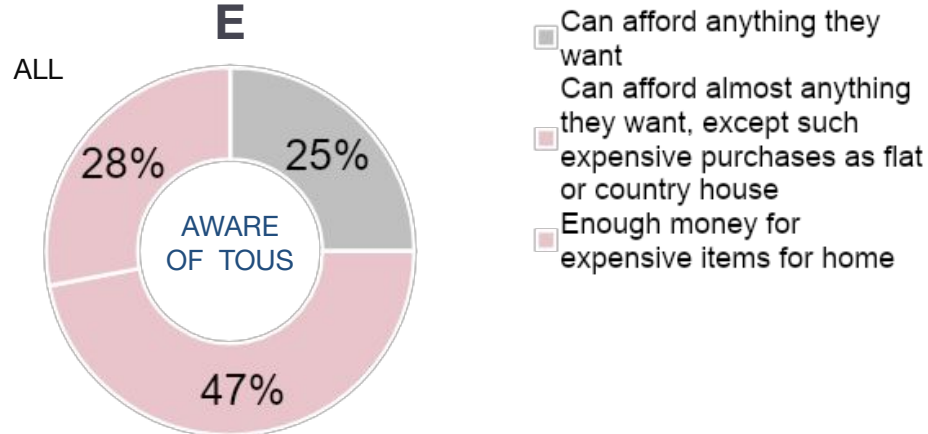
GENDER



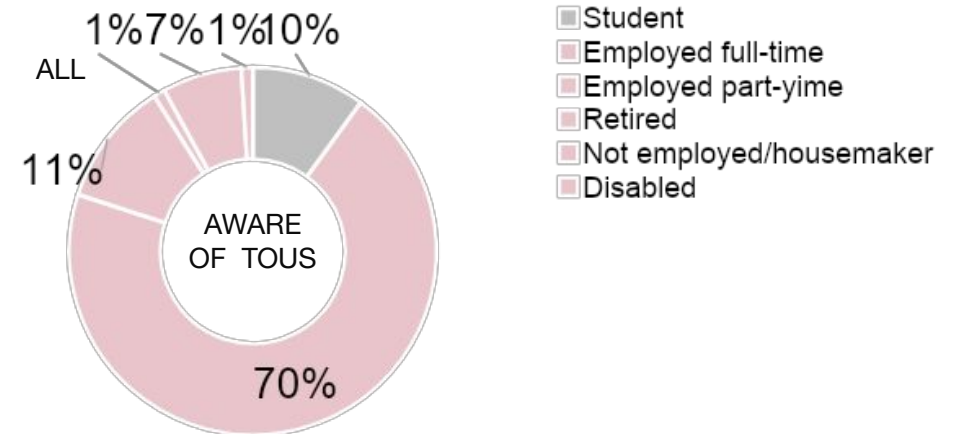
AGE



INCOME



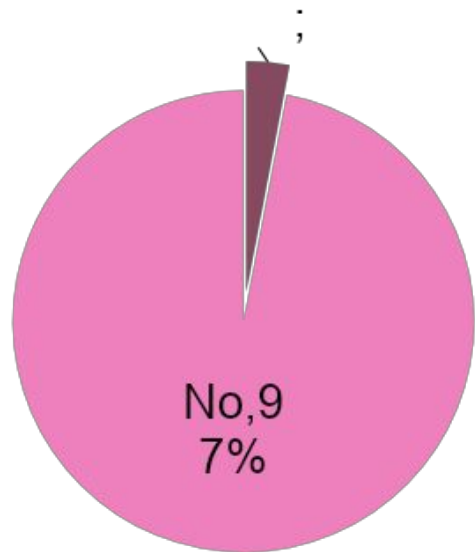
EMPLOYMENT





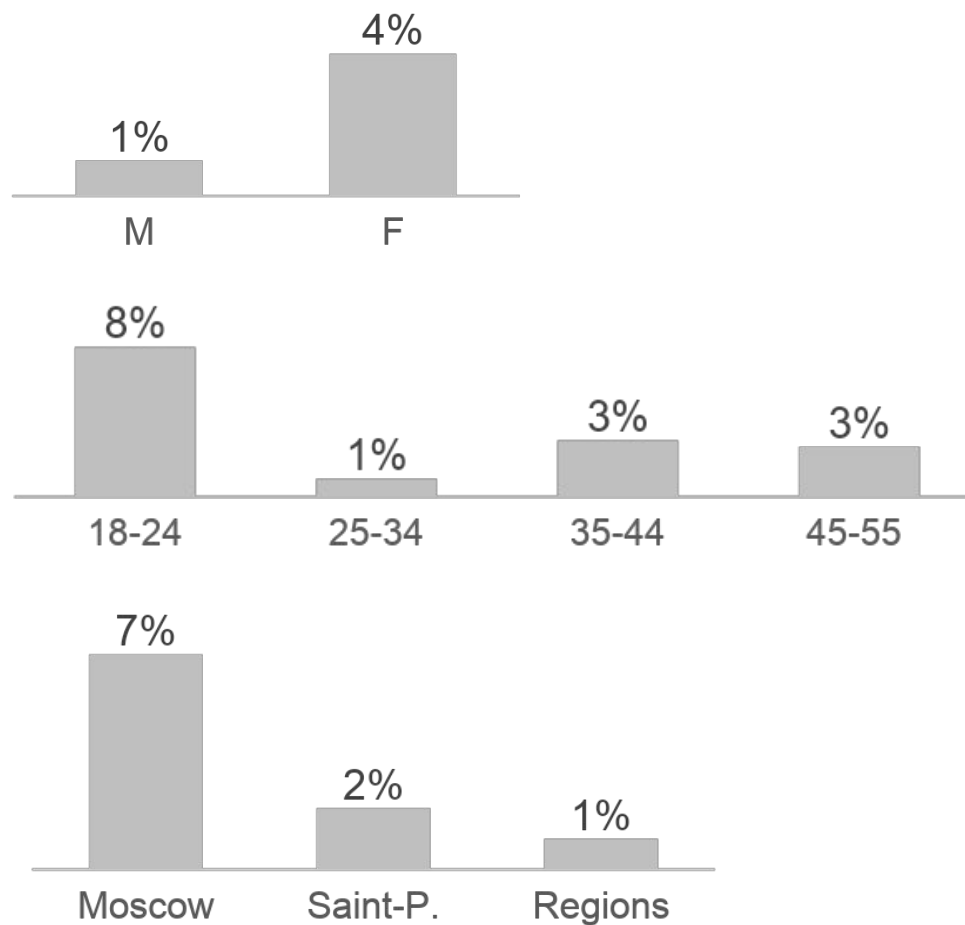
Though only 3% of overall have ever bought TOUS jewelry, among aware of TOUS there are 29% of TOUS customers

HAVE YOU EVER BOUGHT TOUS JEWELRY?



Among aware of TOUS
29%

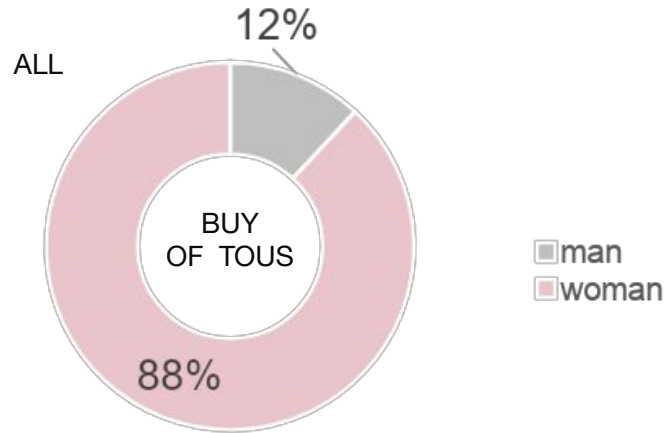
HAVE YOU EVER BOUGHT TOUS JEWELRY?



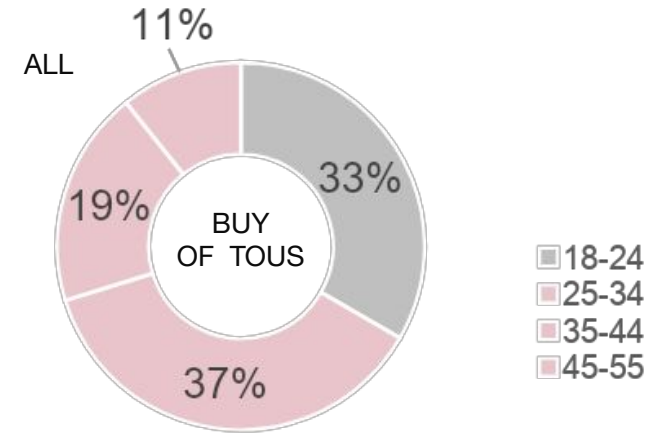


Among TOUS customers there are more women, youth and people who can afford anything they want

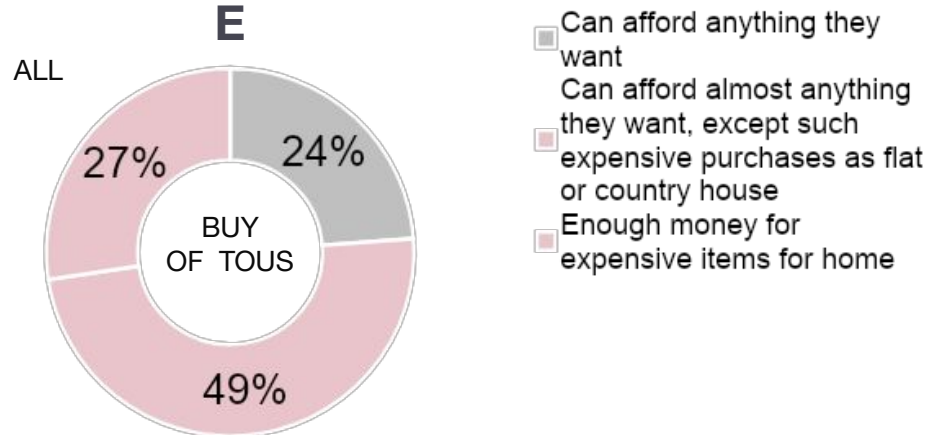
GENDER



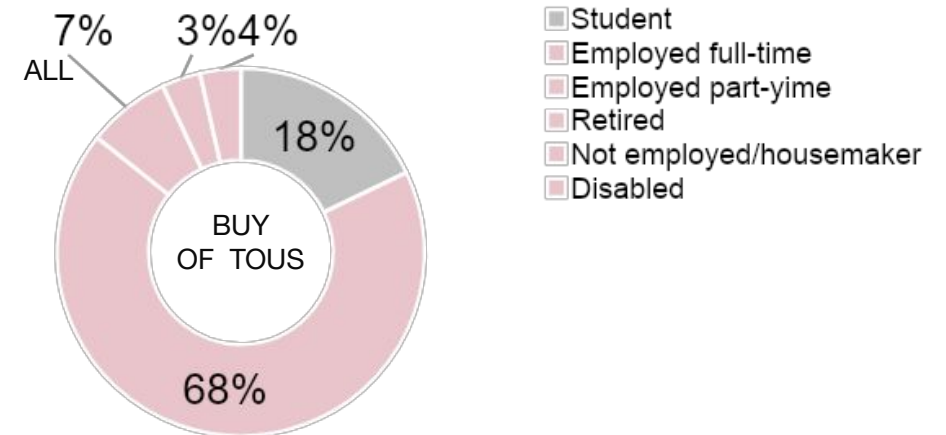
AGE



INCOME



EMPLOYMENT



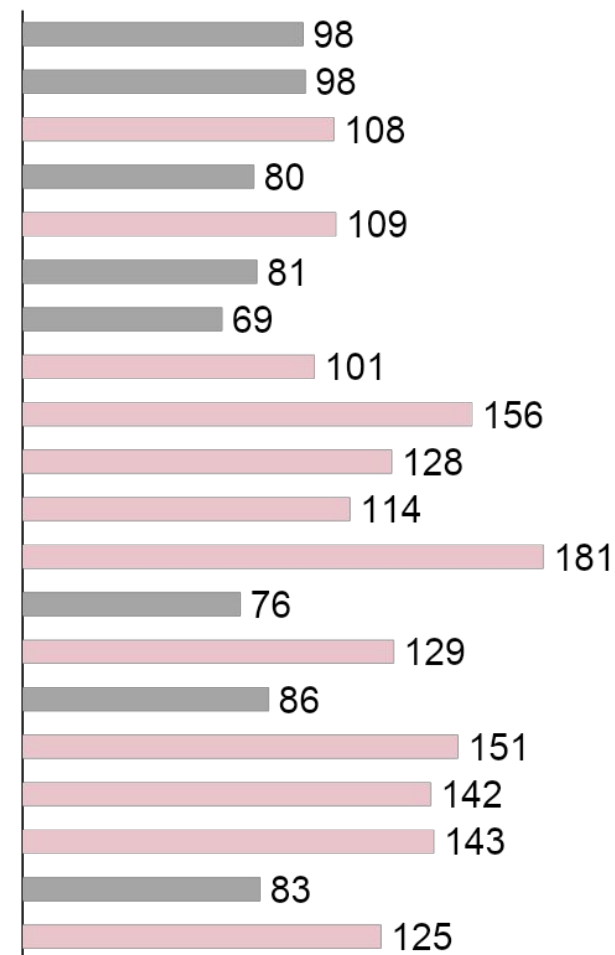


TOUS customers are practical, get pleasure from shopping. It is more typical for them to visit prestigious shops, be price sensitive and be influenced by celebrities

LIFESTYLE STATEMENT (TOTALLY AGREE+AGREE)



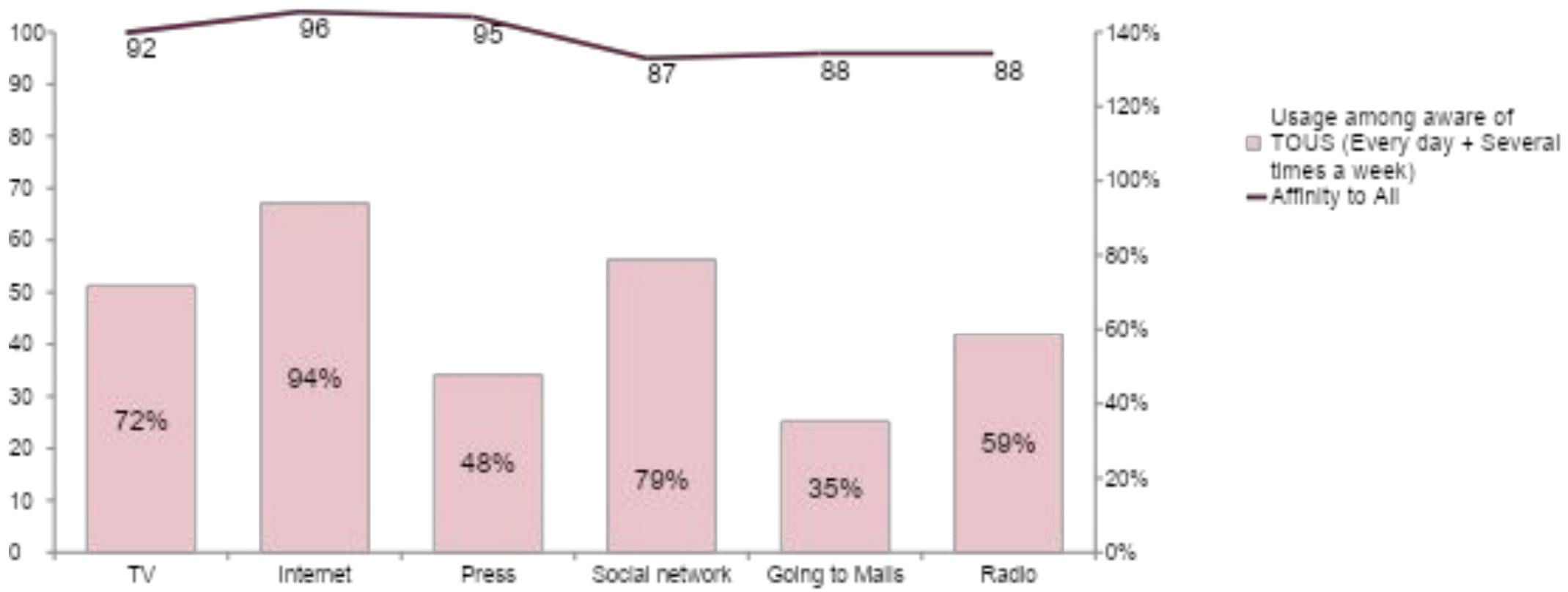
AFFINITY (VS ALL JEWELRY CUSTOMERS)





Usage of media among those who are aware of TOUS does not show significant difference from target audience in general

HOW OFTEN DO YOU...? (Aware of TOUS)



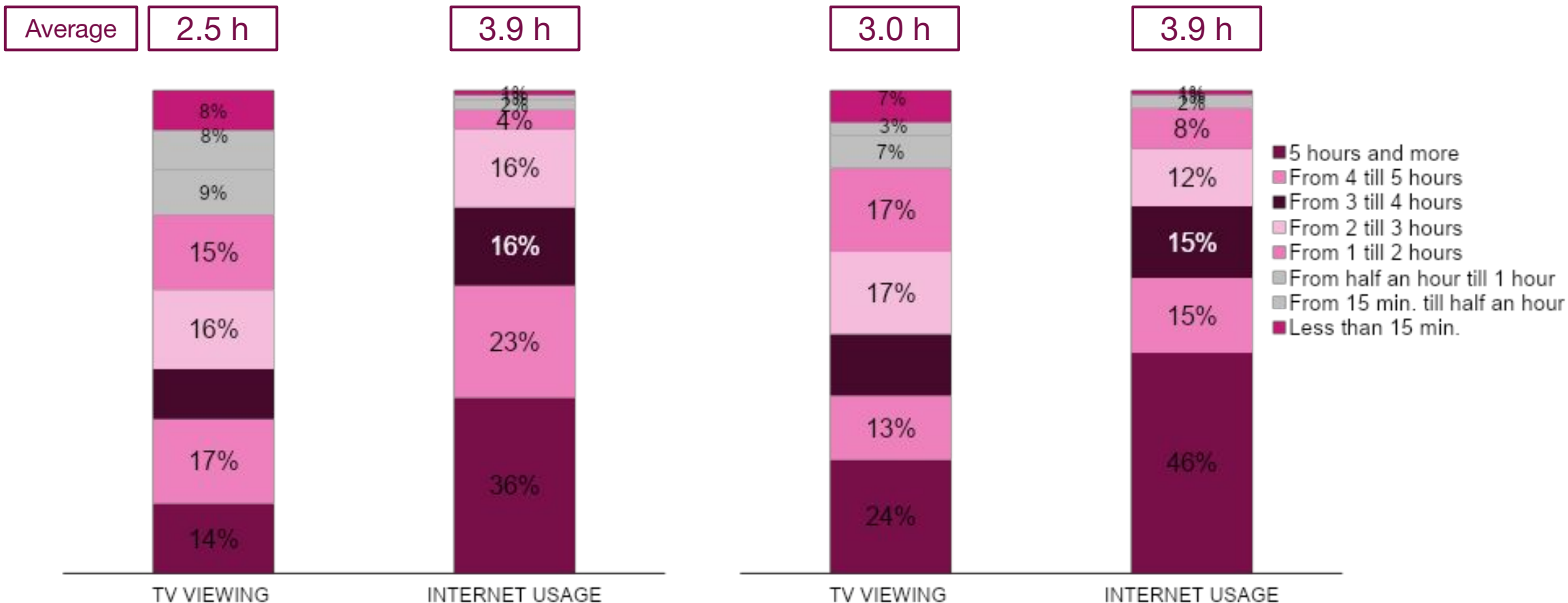


Those who are aware of TOUS use the Internet to the same extent as jewelry customers, average TV viewing is less for 0.5 hour per day

HOW MANY HOURS PER DAY DO YOU SPEND ON...?

AWARE OF TOUS

ALL

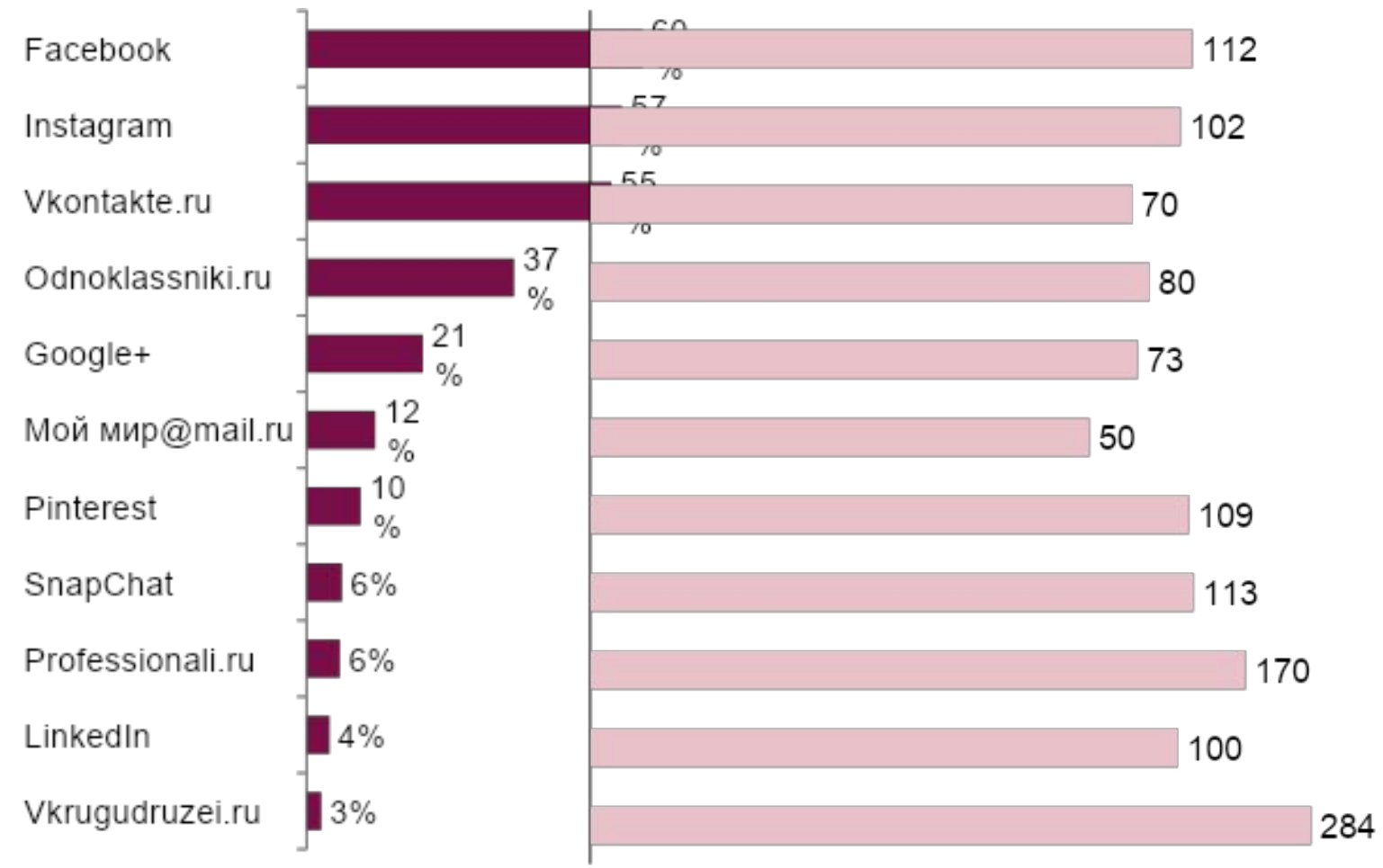




Facebook, Instagram and Vkontakte.ru have the largest cover but the most affinitive social media are Professionali.ru and Vkrugudruzei.ru

WHAT SOCIAL MEDIA DO YOU USE?

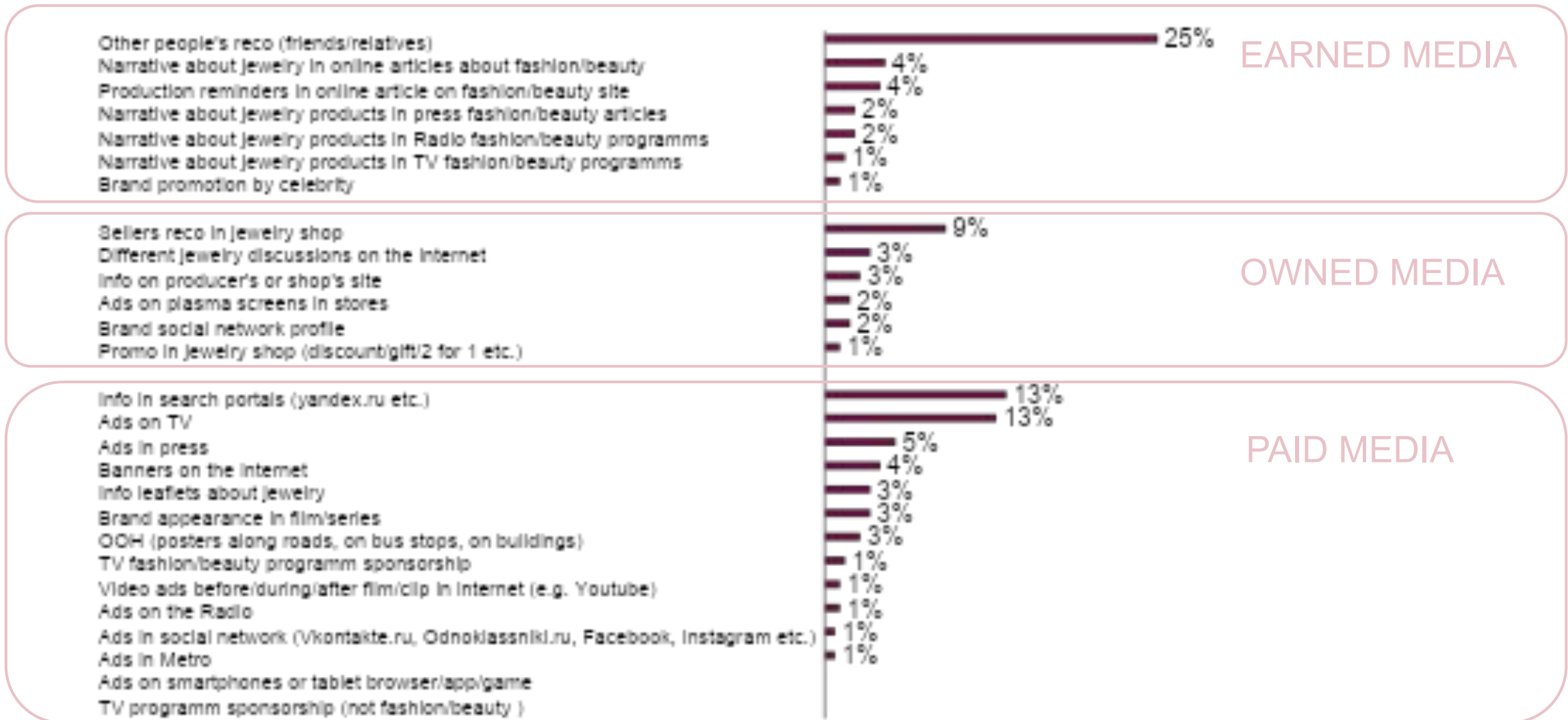
AFFINITY (VS ALL JEWELRY CUSTOMERS)





Leading touchpoints among paid media are search, TV ad and press, owned – sellers reco in shop, earned - word of mouth

HOW DID YOU LEARN ABOUT TOUS?





The youngest group aged 18-24 has a leading position by brand metrics and conversion to purchase and loyalty

ALL

18-24

25-44

45-55

Brand awareness

10%

29%

Purchase

3%

35%

Loyalty

1%

Brand awareness

13%

62%

Purchase

8%

38%

Loyalty

3%

Brand awareness

10%

19%

Purchase

2%

30%

Loyalty

1%

Brand awareness

9%

28%

Purchase

3%

10%

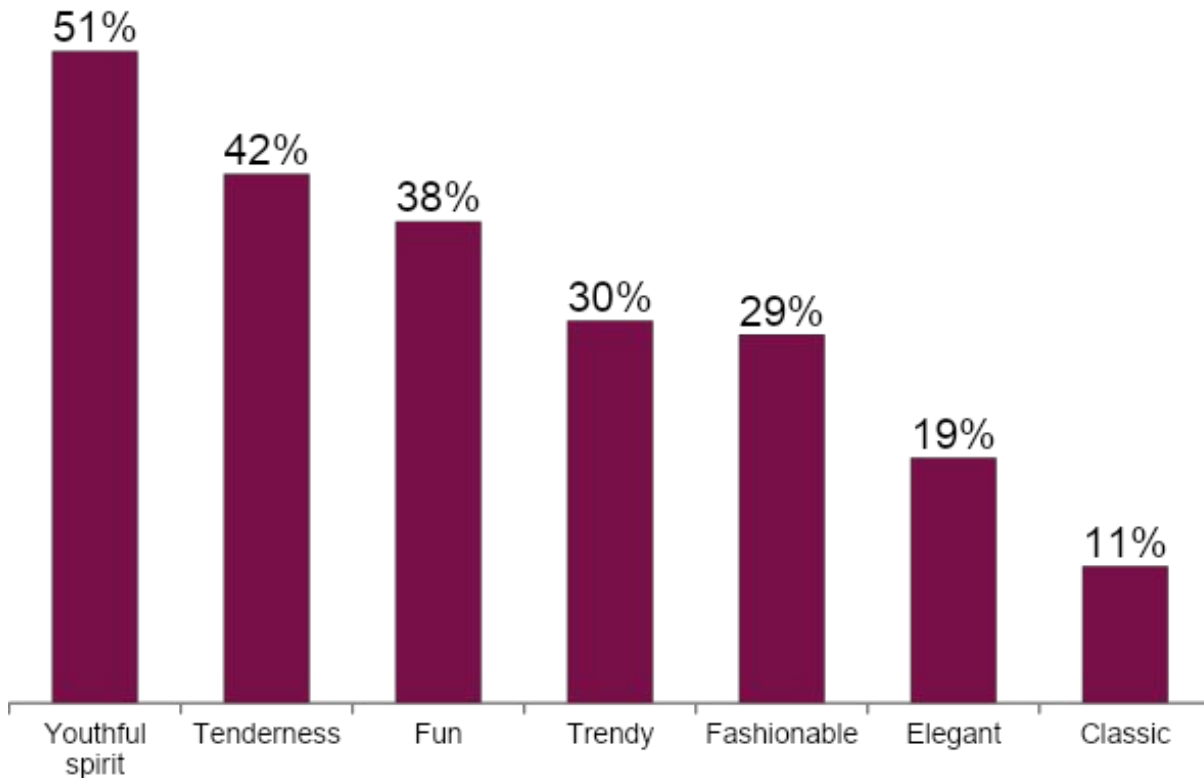
Loyalty

1%



TOUS jewelry is perceived as youthful, tenderness and fun

WHAT IS YOUR OVERALL IMPRESSION OF THE BRAND TOUS?

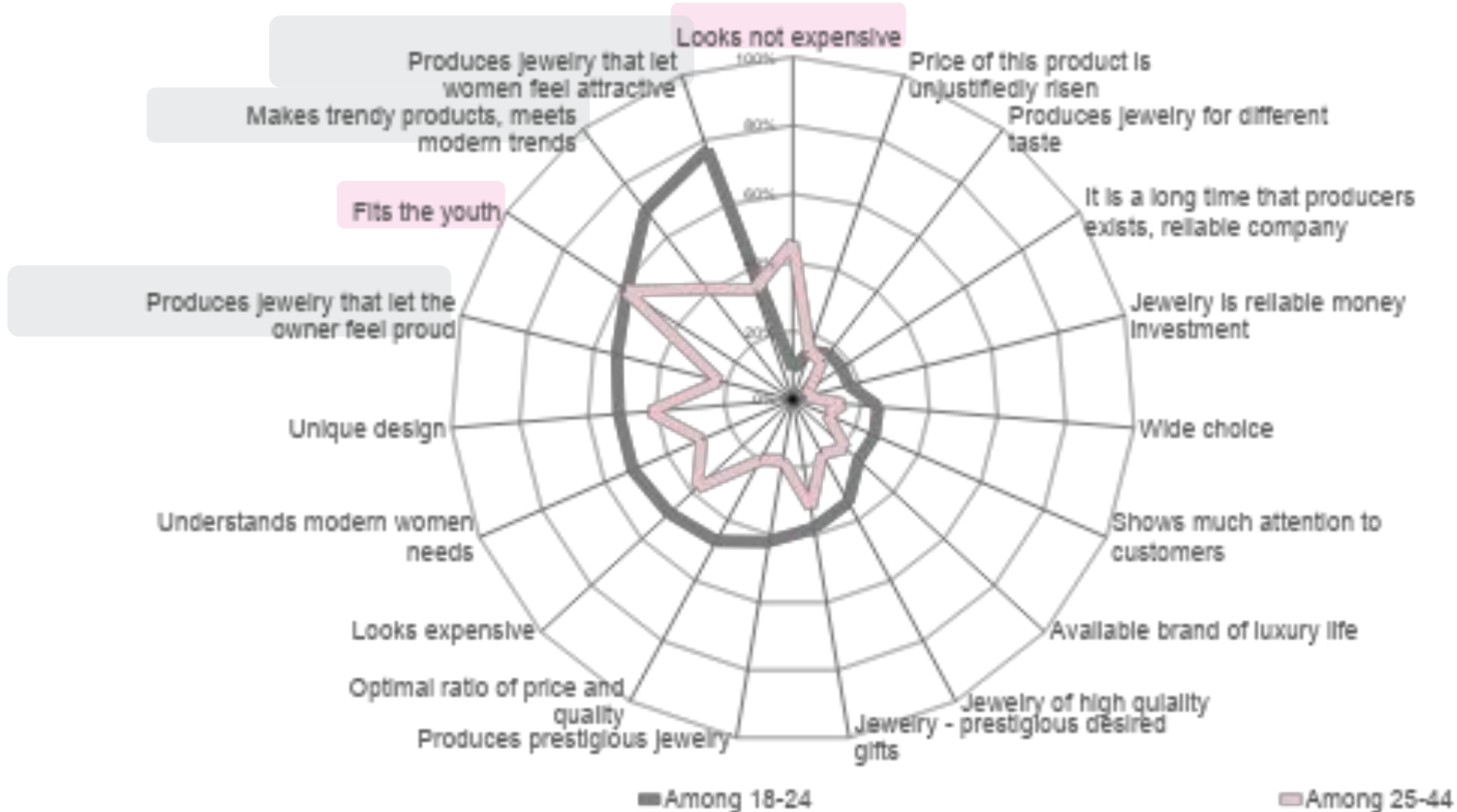


	Fun	Fashionable	Trendy	Youthful spirit	Elegant	Classic	Tenderness	None of the above
M	39%	27%	41%	43%	25%	14%	36%	11%
F	38%	29%	28%	53%	18%	10%	43%	6%
18-24	36%	25%	38%	60%	23%	11%	32%	6%
25-34	45%	38%	34%	51%	20%	10%	41%	5%
35-44	37%	25%	25%	51%	19%	16%	52%	4%
45-55	27%	22%	22%	43%	14%	4%	39%	14%
Moscow	31%	31%	37%	49%	27%	11%	39%	8%
Saint-P.	49%	29%	31%	59%	18%	10%	39%	10%
Regions	40%	27%	22%	50%	11%	10%	46%	4%



Youth think of TOUS like trendy jewelry that let owner feel attractive and proud.
Elder people consider it looks not expensive and fits for youth

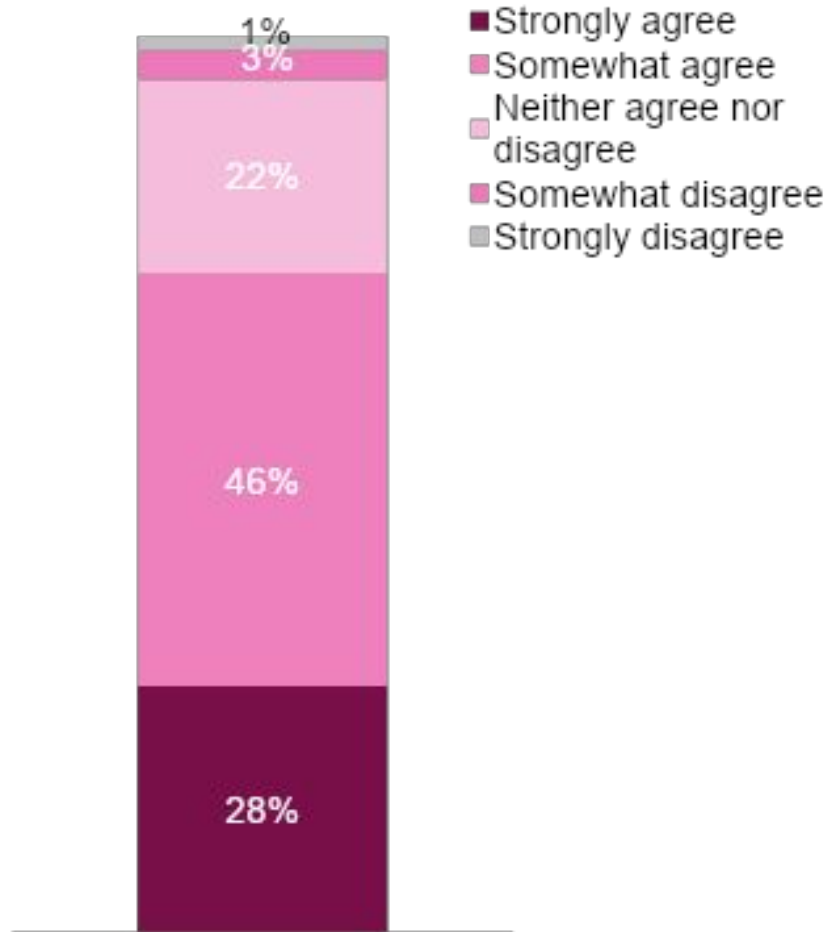
WHAT ARE YOUR OVERALL IMPRESSIONS OF THE TOUS BRAND?





74% agree that each TOUS item reflects the values of the brand

**EACH TOUS ITEM REFLECTS THE VALUES OF THE BRAND:
TENDERNESS, FUN AND A YOUTHFUL SPIRIT**



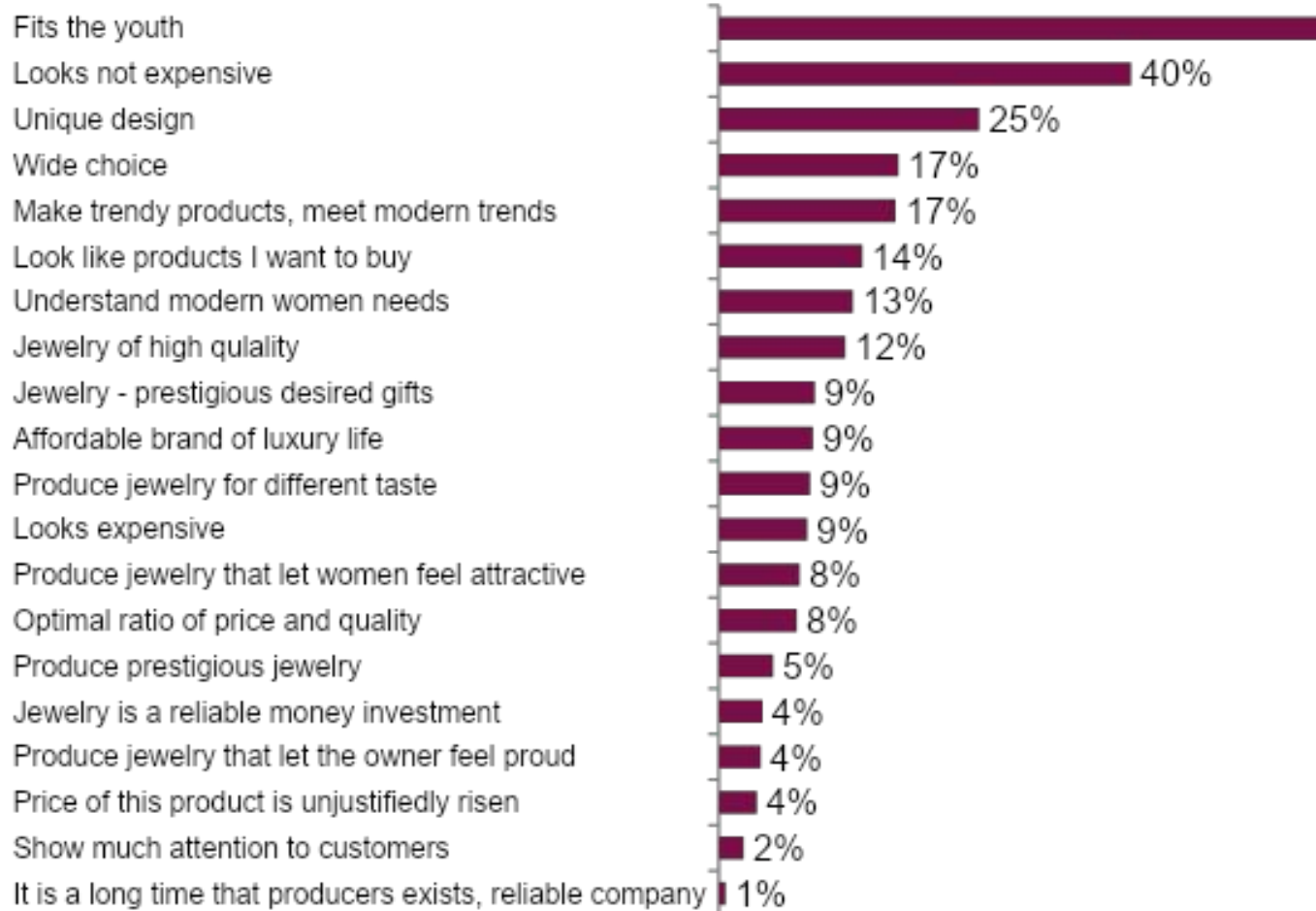
	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
M	27%	41%	25%	2%	5%
F	27%	47%	21%	4%	1%
18-24	23%	55%	19%	2%	1%
25-34	35%	40%	23%	2%	0%
35-44	22%	55%	19%	2%	2%
45-55	25%	37%	24%	10%	4%
Moscow	31%	41%	23%	3%	2%
Saint-P.	29%	47%	18%	4%	2%
Regions	23%	51%	21%	3%	2%

Sample: 269 (aware of TOUS)



The majority of those who are not aware of TOUS perceive it as a brand for youth with unique design which doesn't look expensive

EVEN THOUGH YOU HAVE NOT HEARD OF TOUS, WHAT IS YOUR IMPRESSION OF THIS TYPE OF JEWELRY?



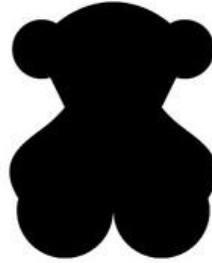
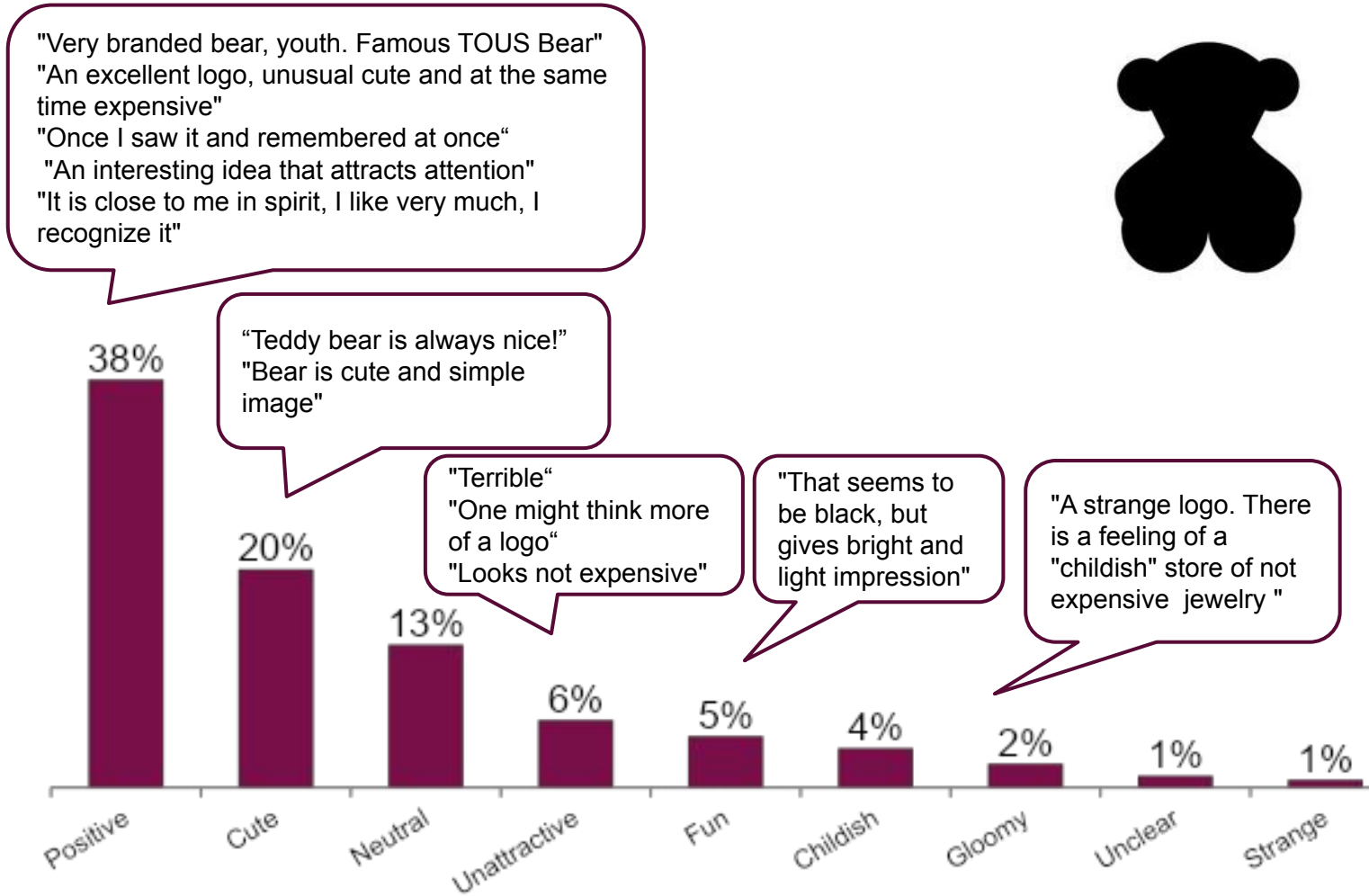
	Fits the youth	Looks not expensive	Unique design	Wide choice	Make trendy stuff, meet modern trends	Look like stuff I want to buy	Understand women needs	Jewelry of high quality
M	56%	34%	24%	21%	12%	13%	14%	15%
F	65%	43%	26%	16%	19%	15%	13%	11%
18-24	69%	53%	37%	17%	28%	21%	15%	5%
25-34	60%	39%	28%	20%	18%	14%	12%	9%
35-44	55%	37%	21%	12%	14%	17%	8%	24%
45-55	71%	37%	16%	20%	11%	4%	19%	8%
Moscow	63%	44%	25%	15%	15%	15%	11%	8%
Saint-P.	60%	37%	24%	15%	19%	16%	16%	11%
Regions	63%	40%	26%	20%	18%	13%	12%	15%

Sample: 1081 (not aware of TOUS)



Those who are aware of the TOUS brand bear leave positive impression on the logo

WHAT IS YOUR OVERALL IMPRESSION OF THE BEAR AS A LOGO?





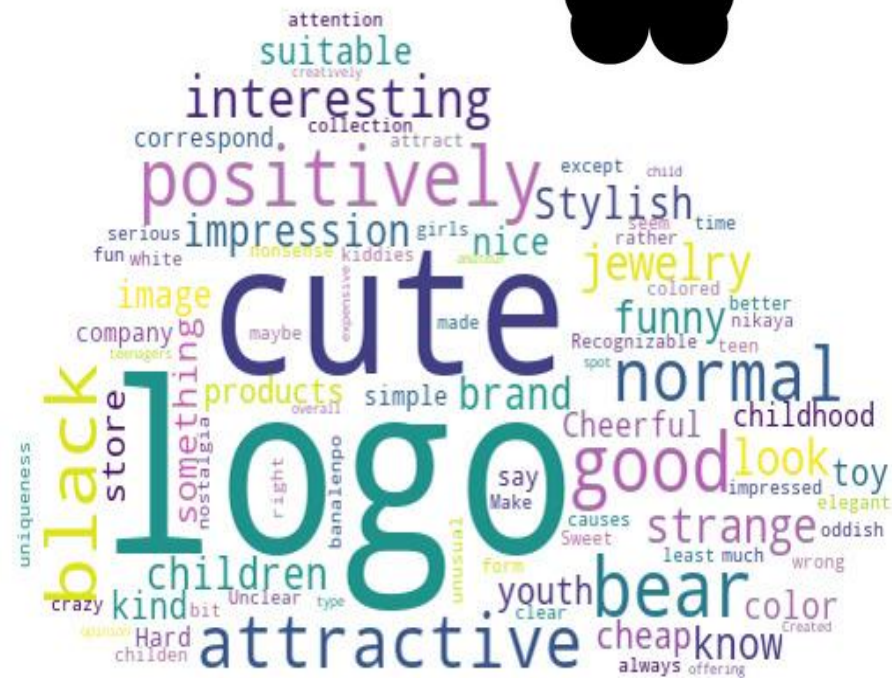
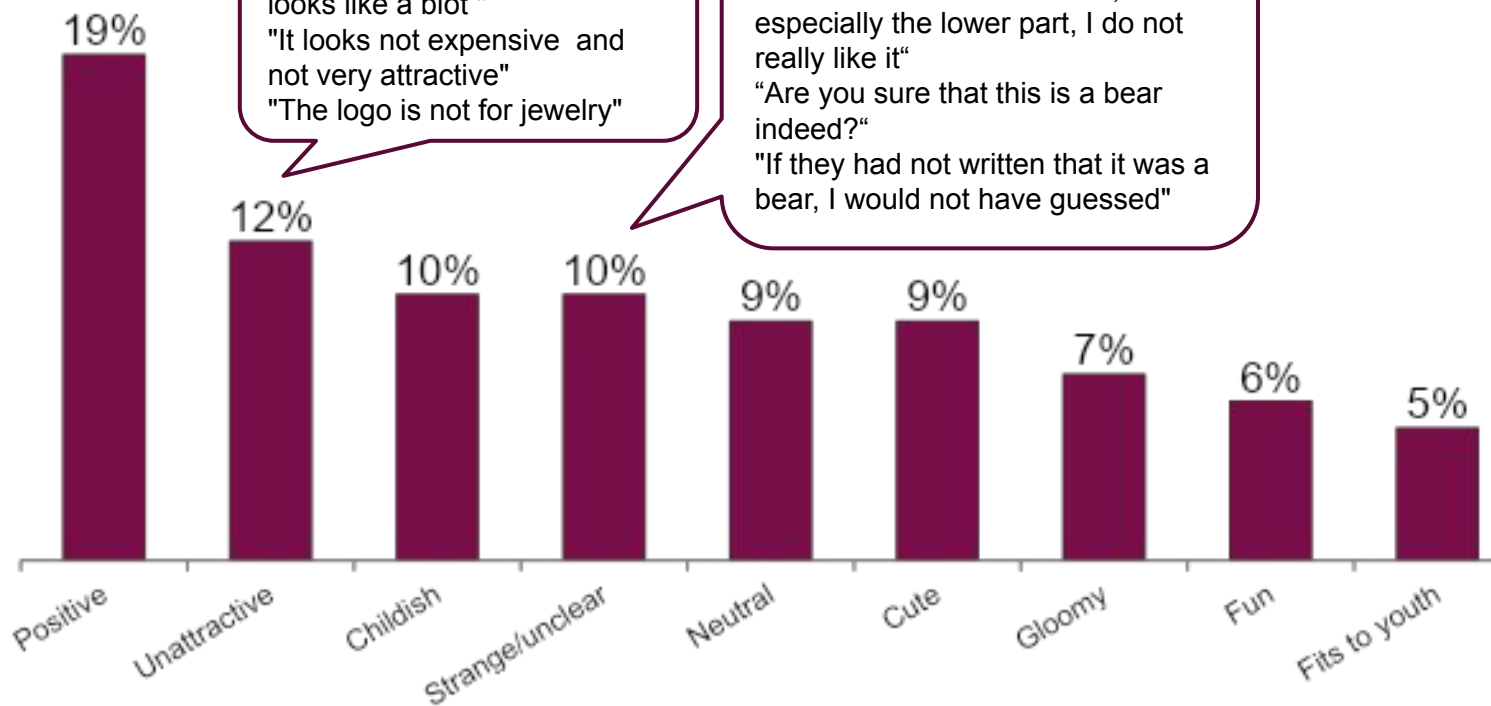
Among those who are unfamiliar with brand, the TOUS bear is perceived to be less positive and more childish/strange

WHAT IS YOUR OVERALL IMPRESSION OF THE BEAR AS A LOGO?

"It looks interesting, original and easy to remember"
 "It looks original. I've never heard of TOUS before, but look of the logo itself, in my opinion, is able to arouse interest to it"
 "An interesting approach, quite creative in comparison to other jewelry companies"

"Unattractive. At first glance it looks like a blot "
 "It looks not expensive and not very attractive"
 "The logo is not for jewelry"

"Its form is somewhat weird, especially the lower part, I do not really like it"
 "Are you sure that this is a bear indeed?"
 "If they had not written that it was a bear, I would not have guessed"



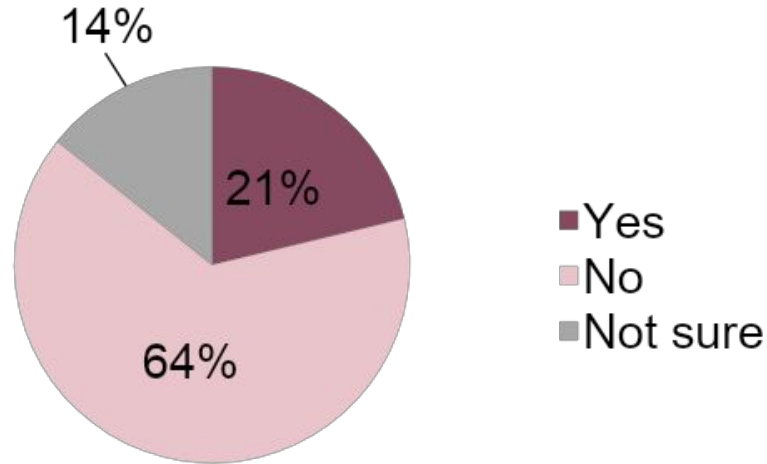
Sample: 1081 (not aware of TOUS)

The bigger word is in number of letters, the more frequently it was marked

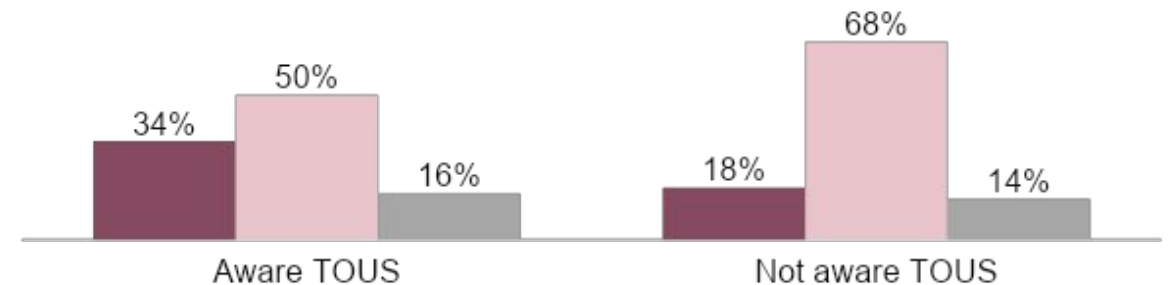
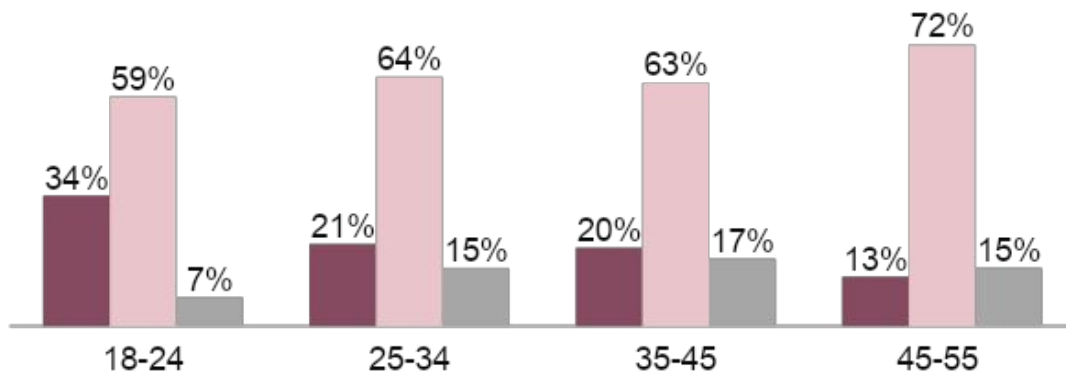


21% are likely to wear jewelry with the Bear on it, the readiness is much higher among those who are aware of the brand and the youngest group 18-24 y.o.

WOULD YOU WEAR JEWELRY WITH THE TOUS BEAR? *



* Large share of “No” may be related with this exact jewelry, not with the Bear





TOUS is preferred for design and style, but small range and high price can be barriers to the purchase

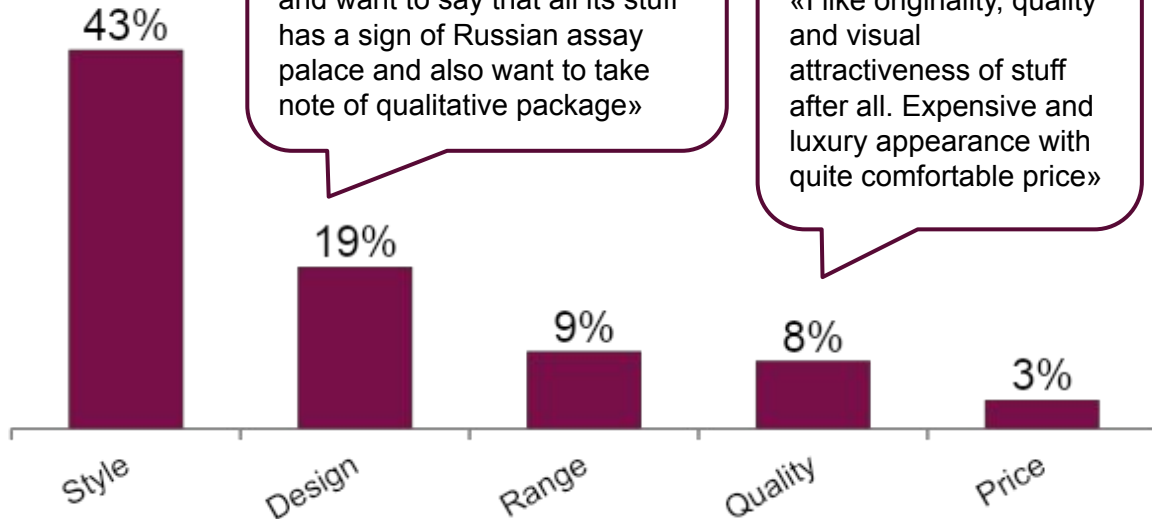


WHAT DO YOU LIKE BEST ABOUT TOUS JEWELRY?

«Very beautiful and original!
Stylish jewelry and price is very appealing that I lost my mind»
«Something very different from that I knew before»

«I got acquainted with the TOUS jewelry brand recently and want to say that all its stuff has a sign of Russian assay palace and also want to take note of qualitative package»

«I like originality, quality and visual attractiveness of stuff after all. Expensive and luxury appearance with quite comfortable price»



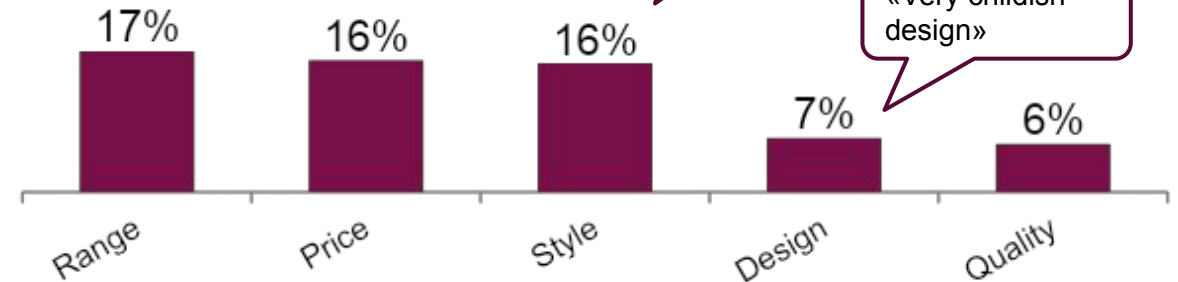
WHAT DO YOU LIKE LEAST ABOUT TOUS JEWELRY?

«Small range of stuff made of white gold in combination with gems (except of brilliants)»

«Some stuff is really overprice»

«Bothers quick in contrast to classic»

«Very childish design»

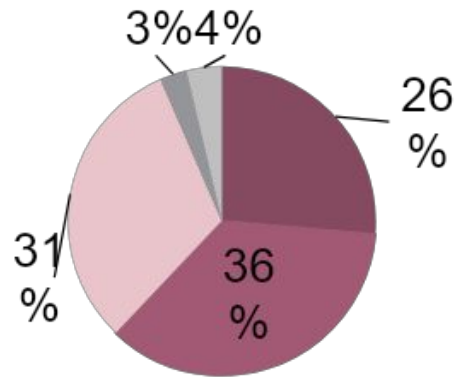




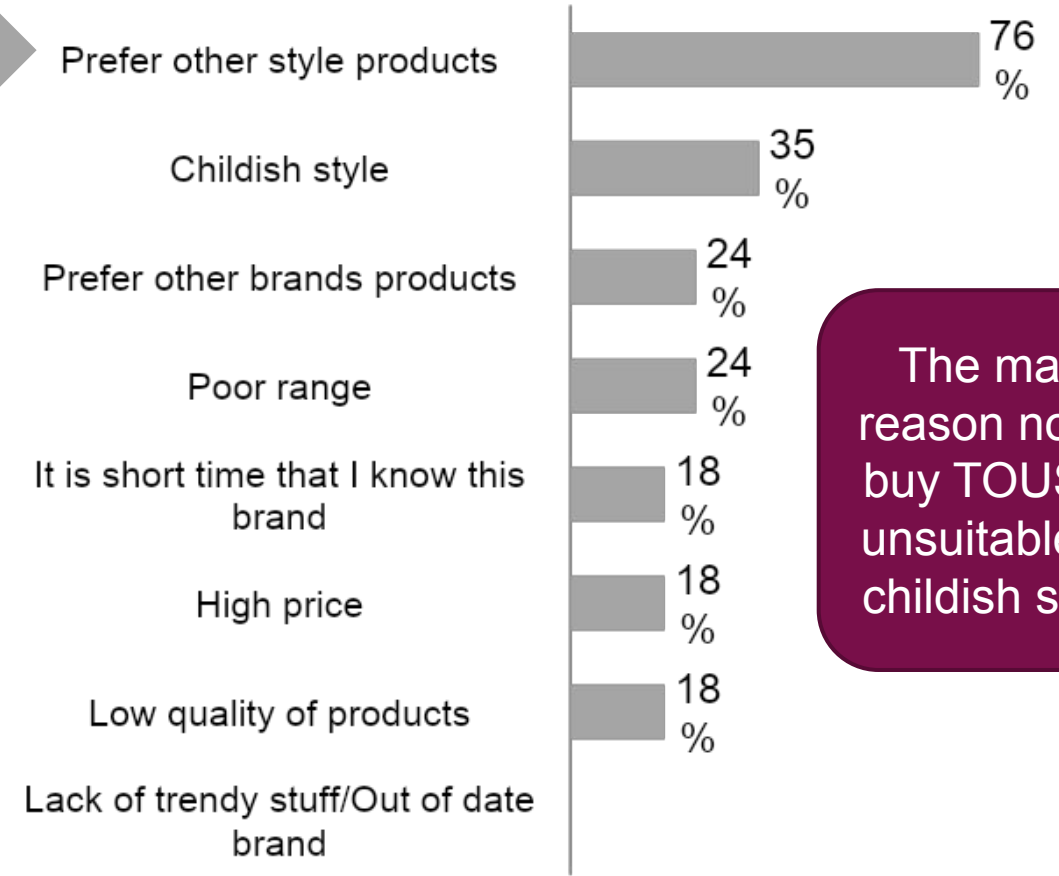
62% are likely to buy TOUS jewelry. The group aged 25-44 has high probability to buy TOUS and has high purchasing power

HOW LIKELY ARE YOU TO BUY TOUS JEWELRY?

- Extremely likely
- Somewhat likely
- Neither likely nor unlikely
- Somewhat unlikely
- Not likely at all



PLEASE MARK THE REASON WHY YOU WON'T BUY IT



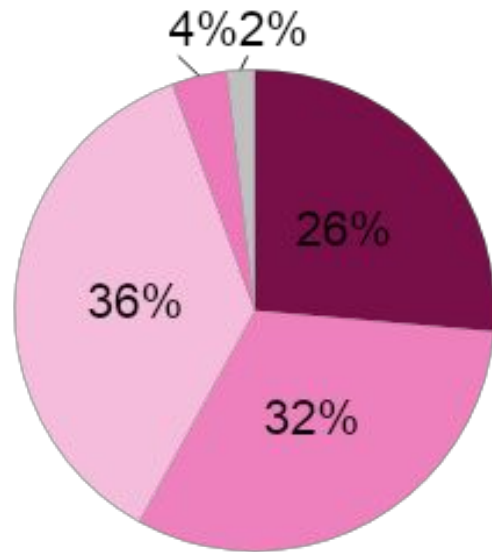
The main reason not to buy TOUS is unsuitable or childish style

	Extremely likely	Somewhat likely	Neither likely nor unlikely	Somewhat unlikely	Not likely at all
18-24	17%	40%	34%	4%	6%
25-34	29%	38%	31%	1%	2%
35-44	28%	40%	25%	3%	3%
45-55	29%	22%	39%	4%	6%



Also 25-44 y.o. are likely to recommend the brand to their friends

TO WHAT EXTENT IS IT LIKELY THAT YOU WILL RECOMMEND TOUS JEWELRY TO YOUR FRIENDS/RELATIVES/COLLEAGUES?



- Definitely will recommend
- Likely to recommend
- May be will, may be won't
- Not likely to recommend
- Definitely won't recommend

	Definitely will recommend	Likely to recommend	May be will, may be won't	Not likely to recommend	Definitely won't recommend
18-24	19%	26%	45%	8%	2%
25-34	28%	35%	35%	2%	0%
35-44	33%	33%	31%	0%	3%
45-55	22%	29%	37%	8%	4%

**TOUS ADVERTISING
EFFECTIVENESS**





Clip recognition is 13%. Brand attribution is 44%.
 Effective coverage of advertising campaign is 6% in total



Clip recognition
13%

Brand attribution
44%

Effective coverage
6%

- Aided recognition - % of respondents who saw the advertising message at least once
- Correct attribution with brand - % of correctly named the brand among those who saw the advertising message
- Effective coverage - % of the respondents who saw the advertising and at the same time correctly attributed to the brand

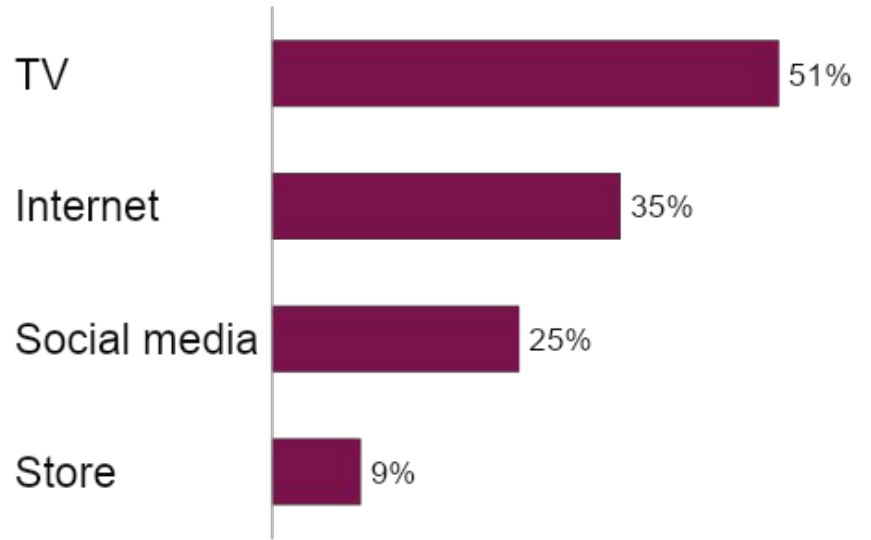
	Aided recognition
M	10%
F	15%
18-24	22%
25-34	11%
35-44	15%
45-55	6%
Moscow	19%
Saint-P.	11%
Regions	12%



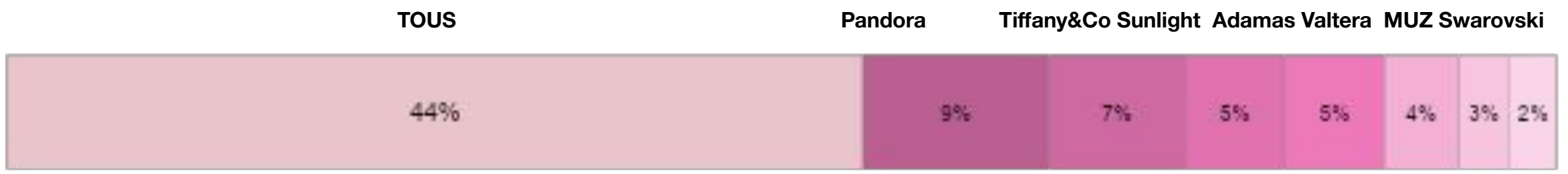
56% confuse the brand of the TV ad. However there is wide range of the competitors, there is no brand-leader with strong association with the clip



WHERE DID YOU SEE THIS ADVERTISING MESSAGE?



ATTRIBUTION WITH BRAND

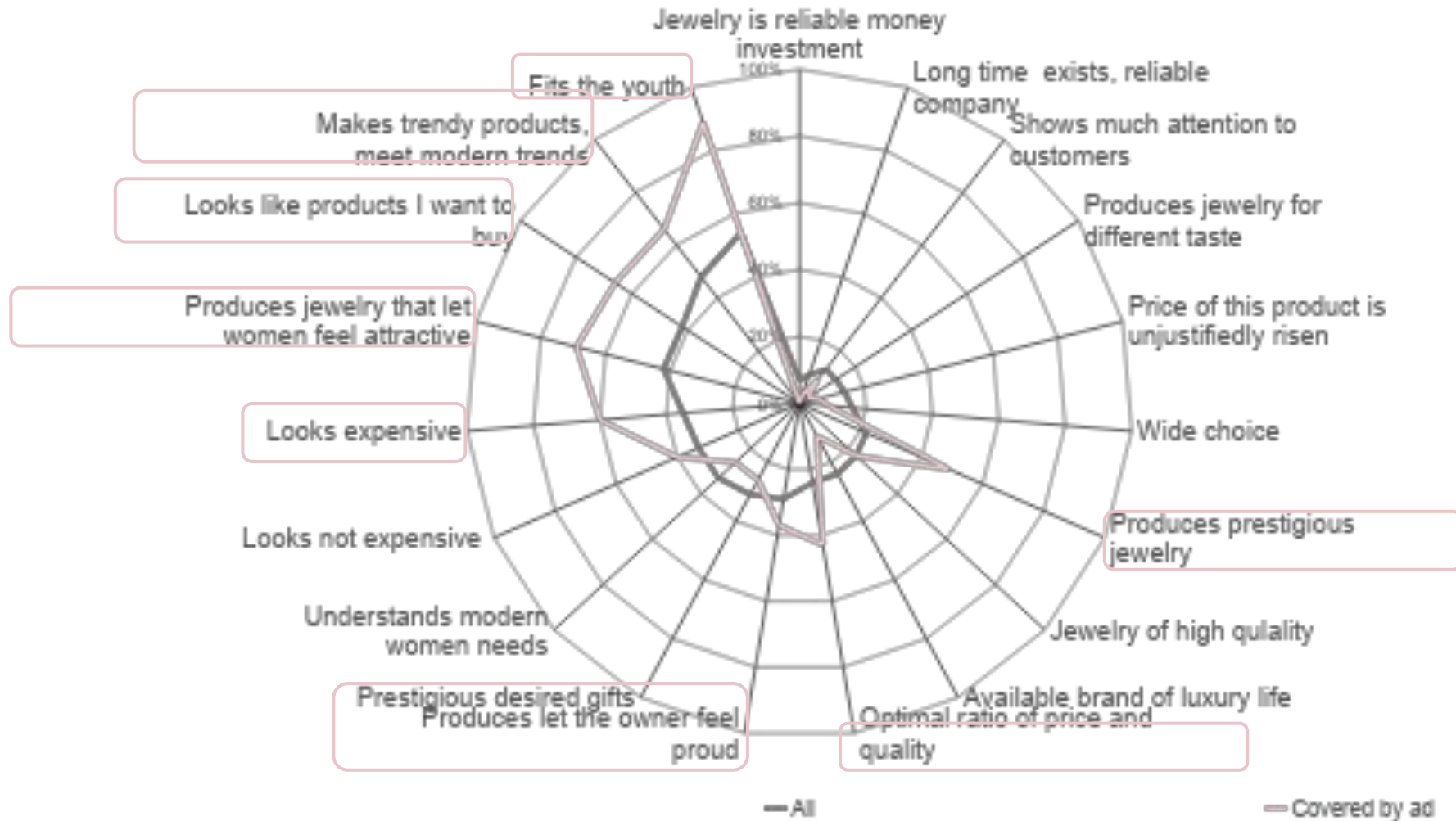


Sample: 158 (saw ad)



All main positive brand features have been increased by communication with TOUS ad

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE TOUS BRAND?



SUMMARY: BRAND AWARENESS AND PURCHASE OF TOUS

- TOUS brand metrics: awareness 10%, purchase 3%, loyalty 1%. The highest results are among 18-24 year old people
- TOUS customers are practical, get pleasure from shopping. It is more typical for them to visit prestigious shops, be price sensitive and be influenced by celebrities.
- Youthful, tenderness and fun are exact words to describe the brand, logo is mostly positive and cute.
- The style and design are what is liked most while small range and high price are liked the least.
- Media consumption among those who are aware of TOUS doesn't differ significantly from all jewelry customers.
- 62% are likely to buy TOUS jewelry. People, aged 25-44 have high probability to buy TOUS & intend to recommend it to others.
- Clip recognition is 13%. Brand attribution is 44%. Effective coverage of advertising campaign is 6% in total. All main positive brand features have been increased by communication with TOUS ad.

**COMPETITORS:
BRAND METRICS
OVERVIEW**

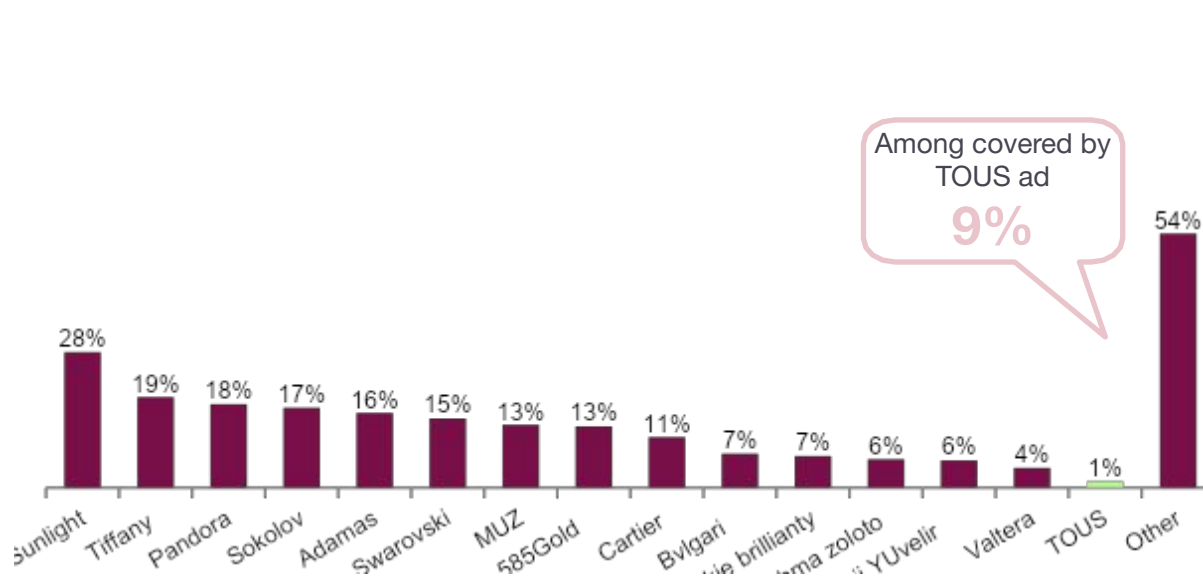




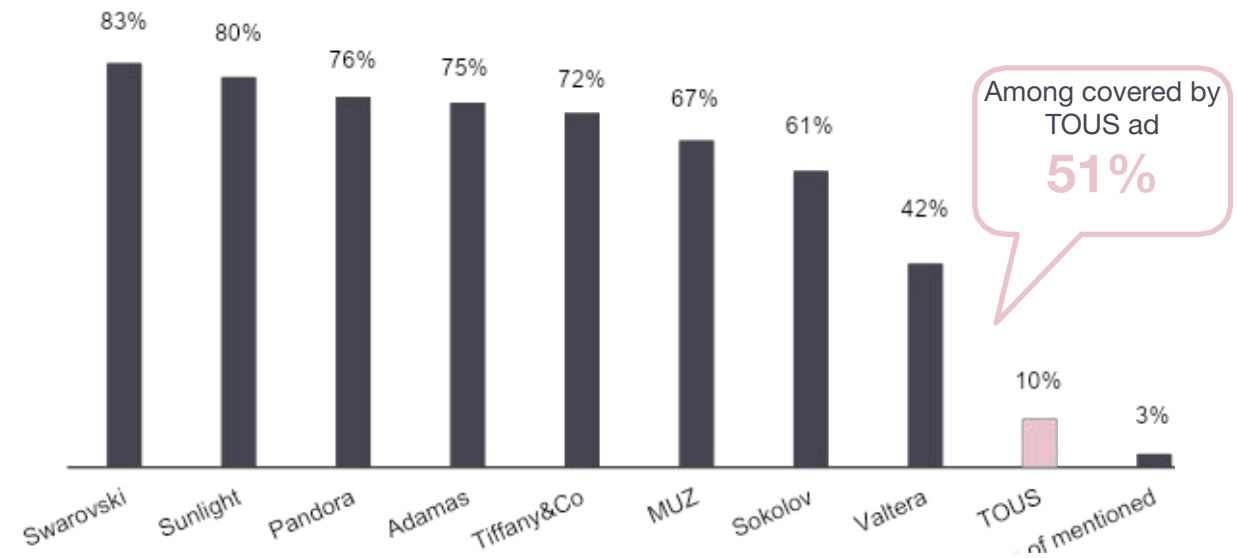
Brand awareness: TOUS shows rather low results, but among covered by TOUS ad it is much higher

WHAT BRANDS OF JEWELRY DO YOU KNOW OR HAVE HEARD OF?

Spontaneous brand awareness



Aided brand awareness



	Sunlight	Tiffany	Pandora	Sokolov	Adamas	Swarovski	MUZ	585Gold	Cartier	Bvlgari	Yakutskie brilliantly	Yashma zoloto	Bronitskij Yuvelir	Valtera	TOUS	Other
18-24	31%	23%	20%	17%	6%	14%	9%	26%	6%	12%	2%	11%	3%	6%	3%	57%
25-34	31%	20%	20%	22%	21%	12%	13%	13%	8%	6%	5%	5%	8%	6%	2%	57%
35-44	25%	16%	19%	12%	16%	14%	11%	6%	15%	9%	7%	6%	6%	4%	0%	51%
45-55	26%	18%	9%	14%	13%	21%	21%	12%	15%	4%	14%	4%	4%	1%	1%	47%

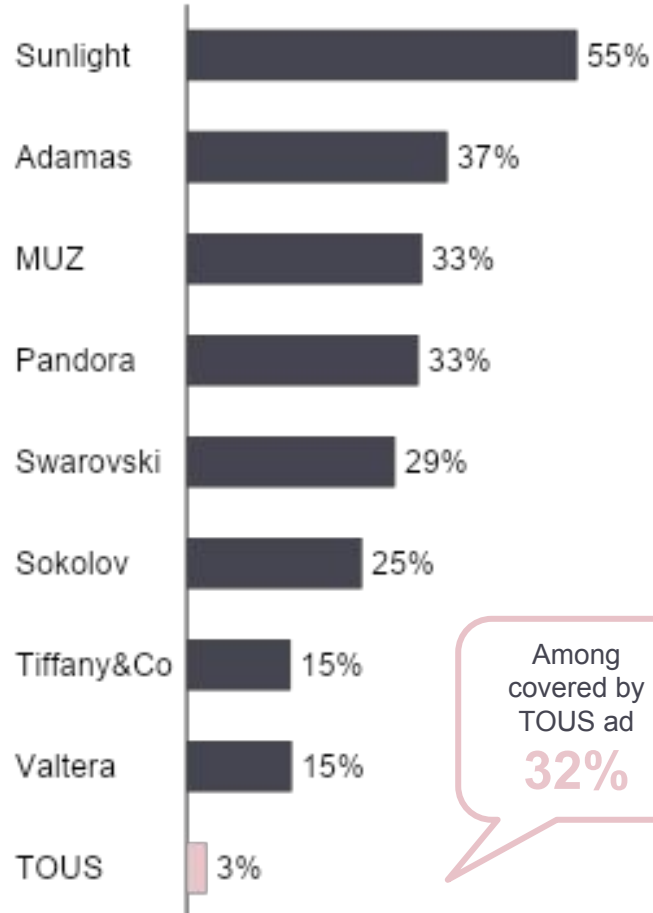
	Swarovski	Sunlight	Pandora	Adamas	Tiffany&Co	MUZ	Sokolov	Valtera	TOUS
18-24	93%	90%	90%	80%	79%	64%	68%	51%	13%
25-34	84%	81%	84%	77%	78%	67%	67%	44%	9%
35-44	77%	74%	63%	74%	64%	63%	54%	41%	10%
45-55	80%	77%	66%	65%	68%	74%	51%	31%	9%

Sample: 1200 (Main)



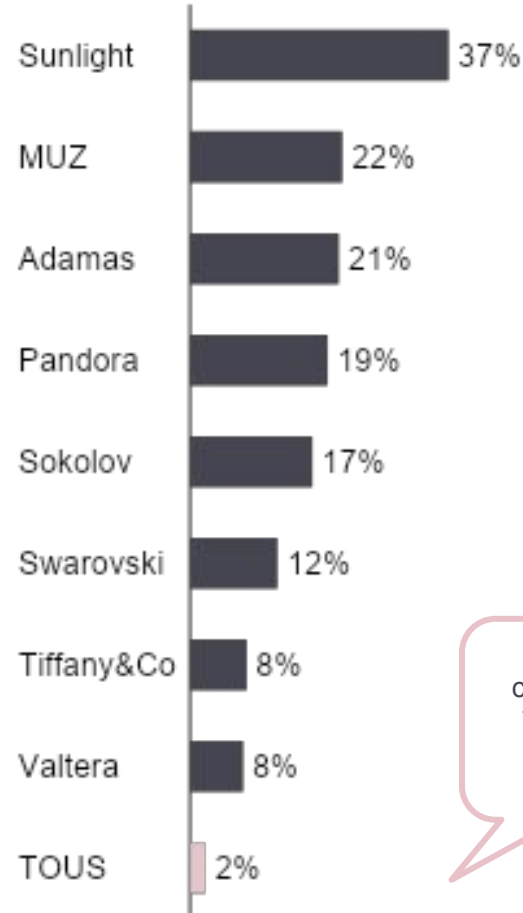
Among covered by TOUS ad purchase and loyalty of TOUS is ten-fold higher

WHAT BRANDS OF JEWELRY HAVE YOU EVER BOUGHT?*



Among covered by TOUS ad
32%

WHAT BRANDS OF JEWELRY DID YOU BUY FOR LAST 12 MONTHS?*



Among covered by TOUS ad
23%

WHAT BRANDS OF JEWELRY DO YOU BUY MORE OFTEN?*



Among covered by TOUS ad
14%

*Respondents could also buy replicas of these brands
Sample: 1200 (Main)



TOUS brand's KPI is not very high. But conversion is rather good.
MUZ has the best conversion from awareness to purchase and loyalty

TOUS

MUZ

PANDORA

SWAROVSKI

Brand awareness
(spontaneous brand awareness)

10%
(1%)

29%

Purchase
3%

35%

Loyalty
1%

Brand awareness
(spontaneous brand awareness)

67%
(13%)

50%

Purchase
33%

43%

Loyalty
14%

Brand awareness
(spontaneous brand awareness)

76%
(18%)

43%

Purchase
33%

30%

Loyalty
10%

Brand awareness
(spontaneous brand awareness)

83%
(15%)

36%

Purchase
29%

10%

Loyalty
3%



Competitors of TOUS by perception for youth are Sunlight and Pandora

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE BRANDS?

	Sunlight	MUZ	Adamas	Pandora	Sokolov	Swarovski	Tiffany&Co	Valtera	TOUS
Produces jewelry that let the owner feel proud	31%	42%	35%	43%	43%	50%	67%	23%	29%
Jewelry of high quality	34%	66%	49%	40%	46%	46%	64%	27%	23%
Shows much attention to customers	31%	48%	28%	32%	28%	32%	46%	20%	13%
Understands modern women needs	52%	33%	38%	51%	49%	46%	52%	37%	33%
Produces jewelry that let women feel attractive	47%	51%	49%	52%	50%	54%	68%	39%	42%
Produces prestigious jewelry	18%	36%	28%	37%	36%	50%	74%	19%	22%
Looks expensive	23%	35%	36%	33%	41%	51%	72%	26%	35%
Fits the youth	68%	21%	20%	61%	39%	33%	30%	29%	54%
Produces jewelry for different taste	66%	61%	52%	28%	43%	30%	33%	33%	13%
Price of this product is unjustifiably risen	10%	9%	14%	33%	17%	36%	46%	14%	14%
Unique design	26%	21%	18%	47%	36%	53%	63%	17%	44%
It is a long time that producers exists, reliable company	25%	69%	48%	29%	26%	51%	63%	17%	9%
Makes trendy products, meets modern trends	55%	40%	33%	60%	51%	50%	54%	35%	48%
Jewelry is reliable money investment	20%	44%	31%	18%	24%	29%	49%	12%	7%
Optimal ratio of price and quality	59%	43%	34%	25%	35%	14%	11%	23%	24%
Jewelry - prestigious desired gifts	34%	47%	36%	49%	43%	54%	71%	32%	31%
Looks like products I want to buy	38%	46%	38%	40%	42%	37%	52%	27%	42%
Wide choice	68%	65%	54%	40%	48%	39%	43%	35%	16%
Looks not expensive	46%	10%	10%	23%	9%	5%	4%	13%	33%
Available brand of luxury life	39%	33%	26%	31%	33%	26%	24%	20%	24%

Sample: 269 (aware of TOUS)

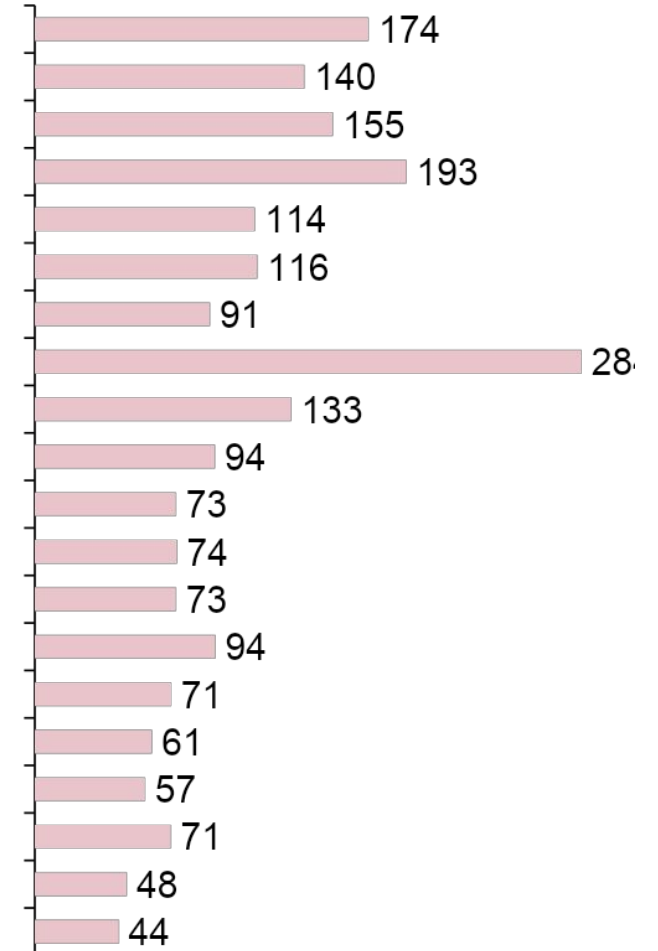
* Pink values – the highest values by the statement (line)



Sunlight looks not expensive, but has optimal ratio of price and quality

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE SUNLIGHT BRAND?

AFFINITY (VS. ALL JEWELRY CUSTOMERS)

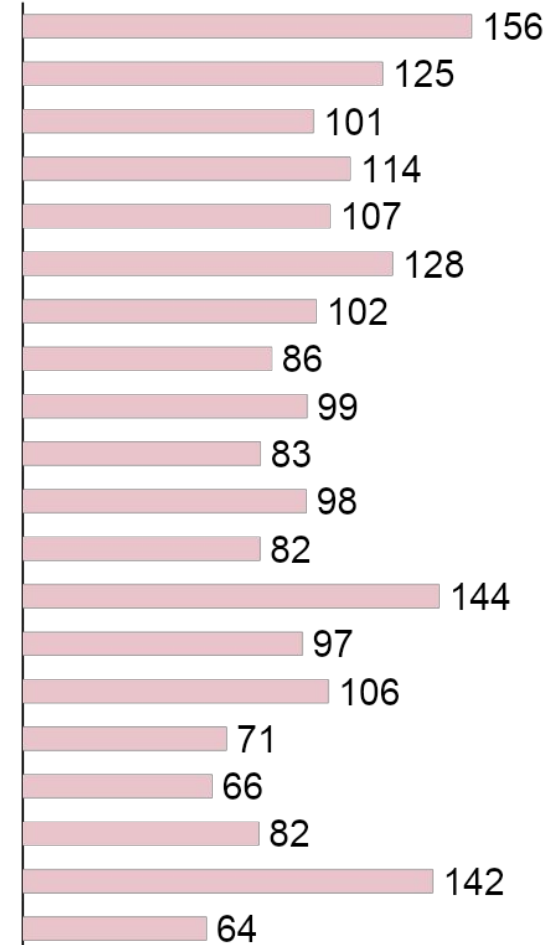




Pandora fits the youth, but its price is perceived like unjustified high

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE PANDORA BRAND?

AFFINITY (VS. ALL JEWELRY CUSTOMERS)

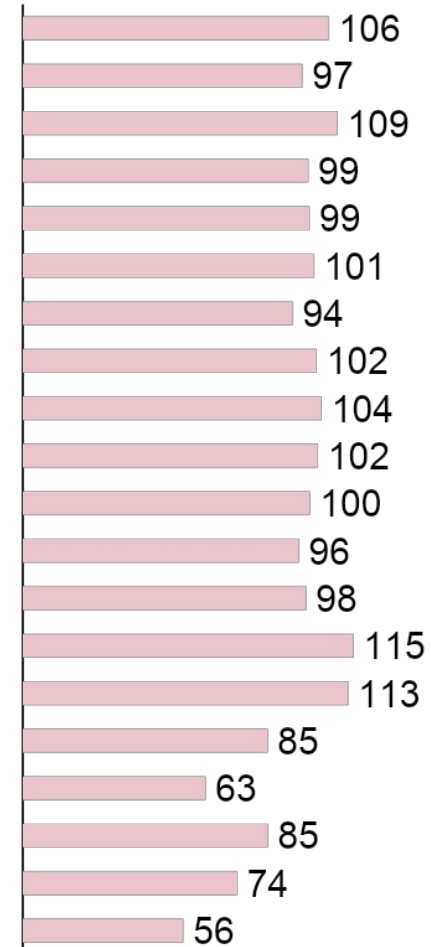




Sokolov has optimal ratio of price and quality and is an available brand of luxury life

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE SOKOLOV BRAND?

AFFINITY (VS. ALL JEWELRY CUSTOMERS)

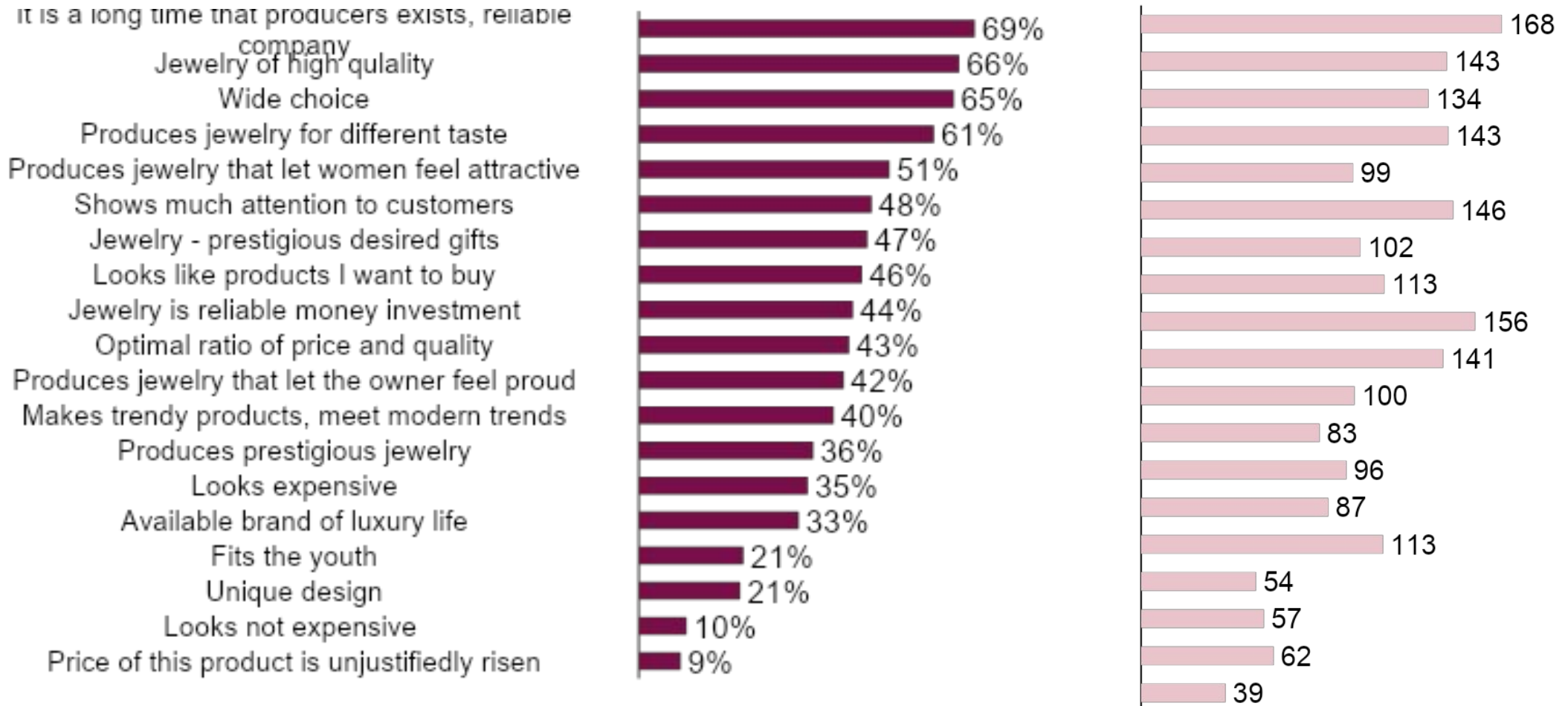




MUZ is a reliable brand with high quality and wide range of products

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE MUZ BRAND?

AFFINITY (VS. ALL JEWELRY CUSTOMERS)

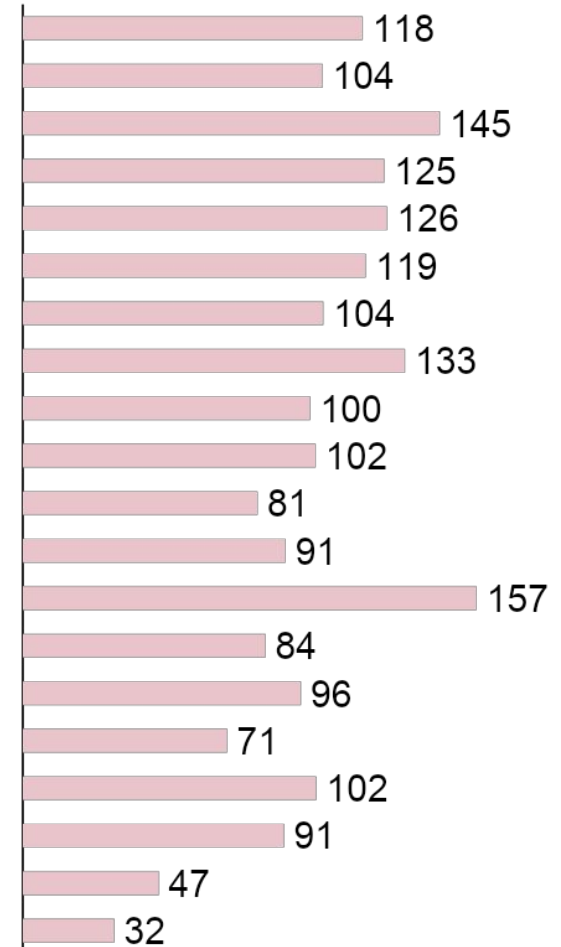




Swarovski is a prestigious brand with unique design but the price is unjustified high

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE SWAROVSKI BRAND?

AFFINITY (VS. ALL JEWELRY CUSTOMERS)

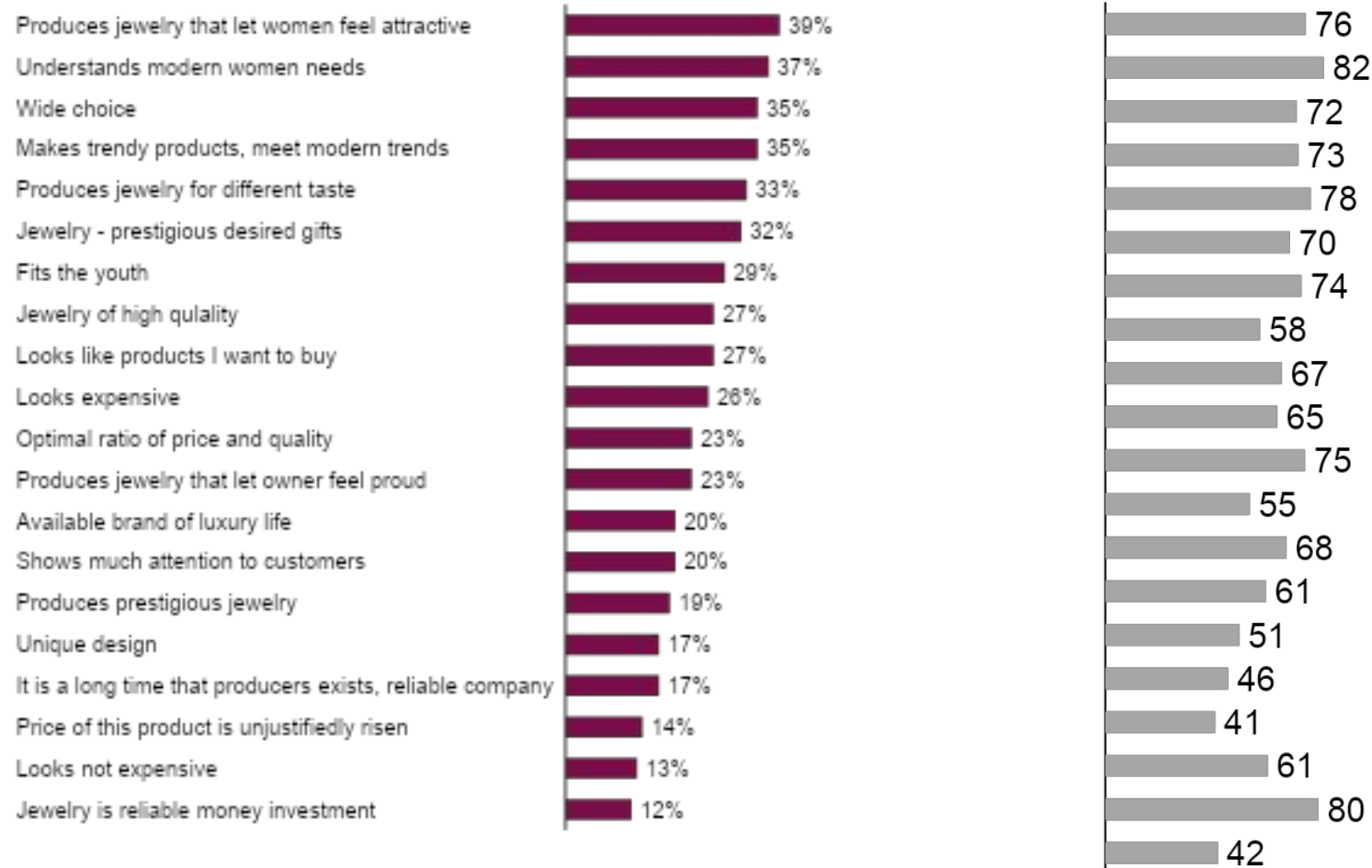




Valtera has no clear brand identity, so all KPIs are lower than the average

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE VALTERA BRAND?

AFFINITY (VS. ALL JEWELRY CUSTOMERS)



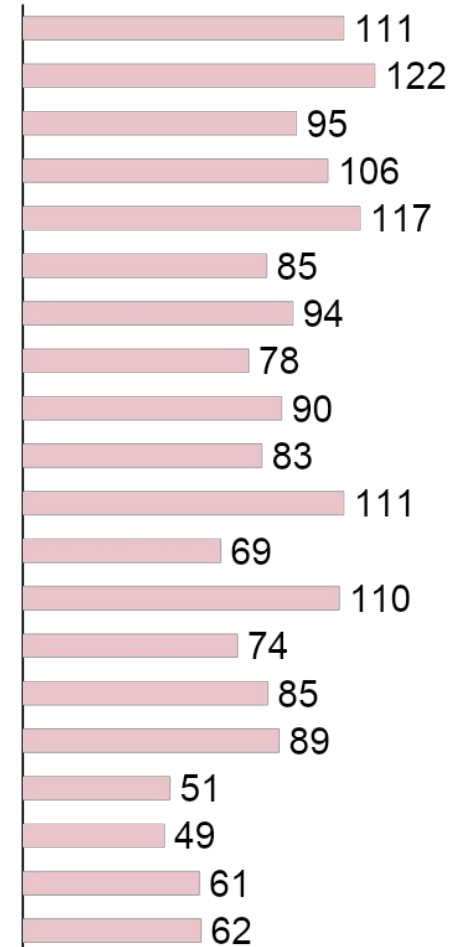


Adamas has long-term history and wide assortment

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE ADAMAS BRAND?



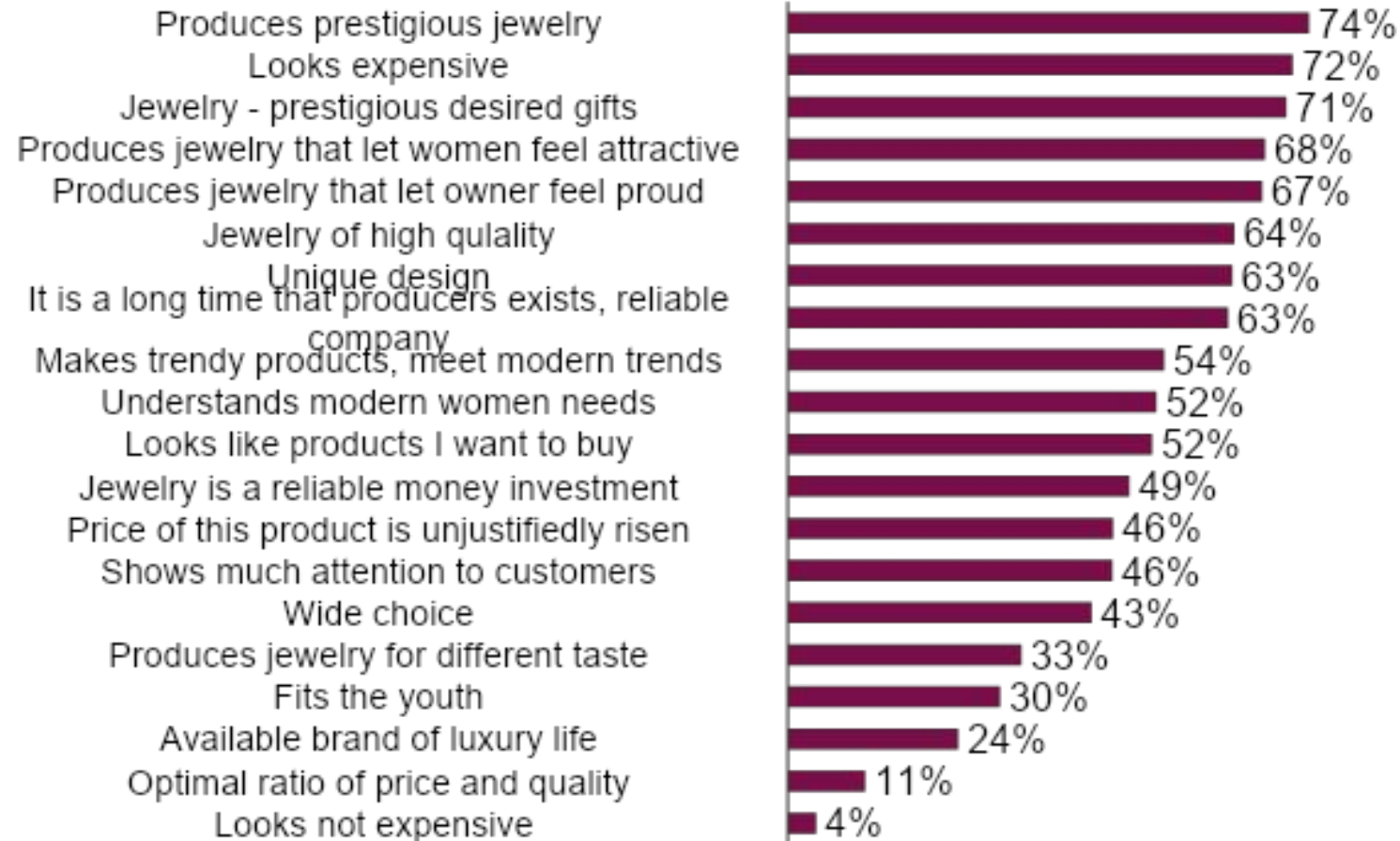
AFFINITY (VS. ALL JEWELRY CUSTOMERS)



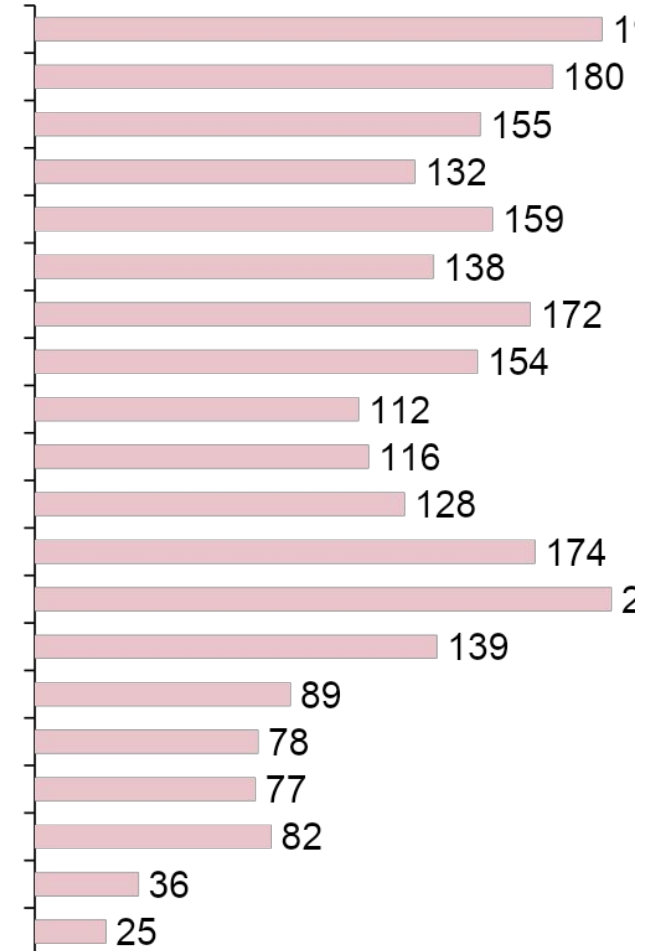


Tiffany is prestigious, expensive and unique jewelry

WHAT ARE YOUR OVERALL IMPRESSIONS OF THE TIFFANY&CO BRAND?



AFFINITY (VS. ALL JEWELRY CUSTOMERS)



SUMMARY: COMPETITORS. BRAND METRICS OVERVIEW

- Brand awareness: TOUS shows rather low results, but among covered by TOUS ad it is much higher
- Among covered by TOUS ad purchase and loyalty of TOUS are ten-fold higher
- TOUS brand's KPI is not very high. But conversion is rather good.
- Competitors of TOUS by perception for youth are Sunlight and Pandora

DISCOVERED INSIGHTS: WHAT THIS MEANS FOR US

INSIGHTS

TOUS consumers are most of all W18-34 y.o. But the customers of jewelry are W25-44 y.o., they also most likely to intend to buy and to recommend TOUS jewelry.

TOUS awareness is not very high, but among people who are aware of TOUS, purchase and loyalty are much higher. Communication with TOUS ads increases it by a factor of 2. Actual ad has good brand attribution, but low aided recognition.

The highest awareness and purchase of TOUS are in Moscow region, but there is much room to grow.

Customers are most likely to learn about new jewelry from TV and internet, their main media channels.

Design and unique style are what is liked best about TOUS, while assortment and price are liked the least.

77% of shoppers are motivated by a loyalty program for a brand of jewelry.

18-24 y.o. are most likely to wear jewelry with the Bear.

Tous has image of not luxurious, prestigious, high quality brand. Especially among 25-44 y.o.

The most popular event to buy jewelry as a gift is a birthday

Earrings and rings are the most popular jewelry.

ACTIONS



Focus on two different audiences: W18-24 and W25-44 years old.



Increase volume of market presence.



Focus on Moscow region, but if there is a possibility consider allocating more ad spending in regions.



Ensure TOUS is clearly communicated on TV and internet.



Promote unique style and design, broad assortment.



Develop usage of loyalty program for TOUS.



Use advertising with the Bear primarily in communication with youth.



Focus on high quality and luxury of brand in ad message targeting on 25-44.



Focus on theme of birthday in ad message.

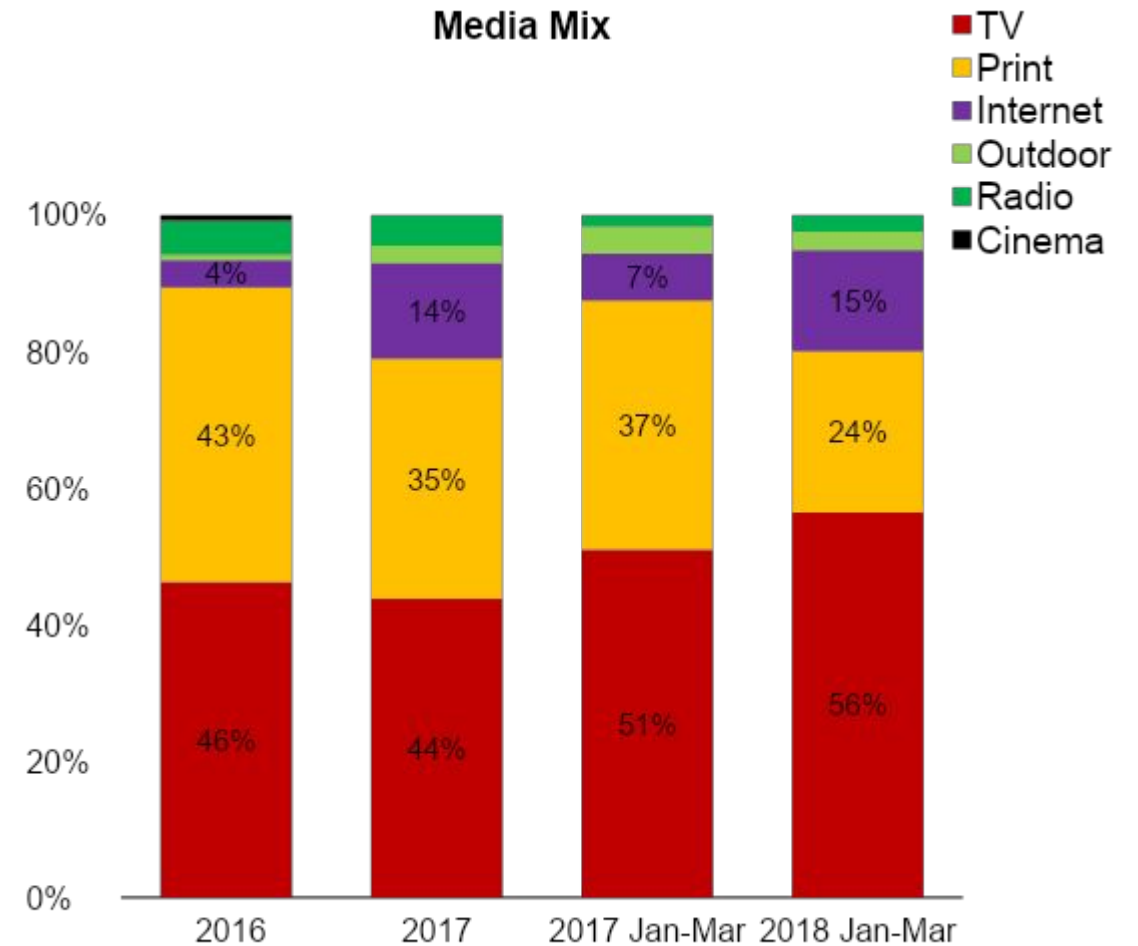
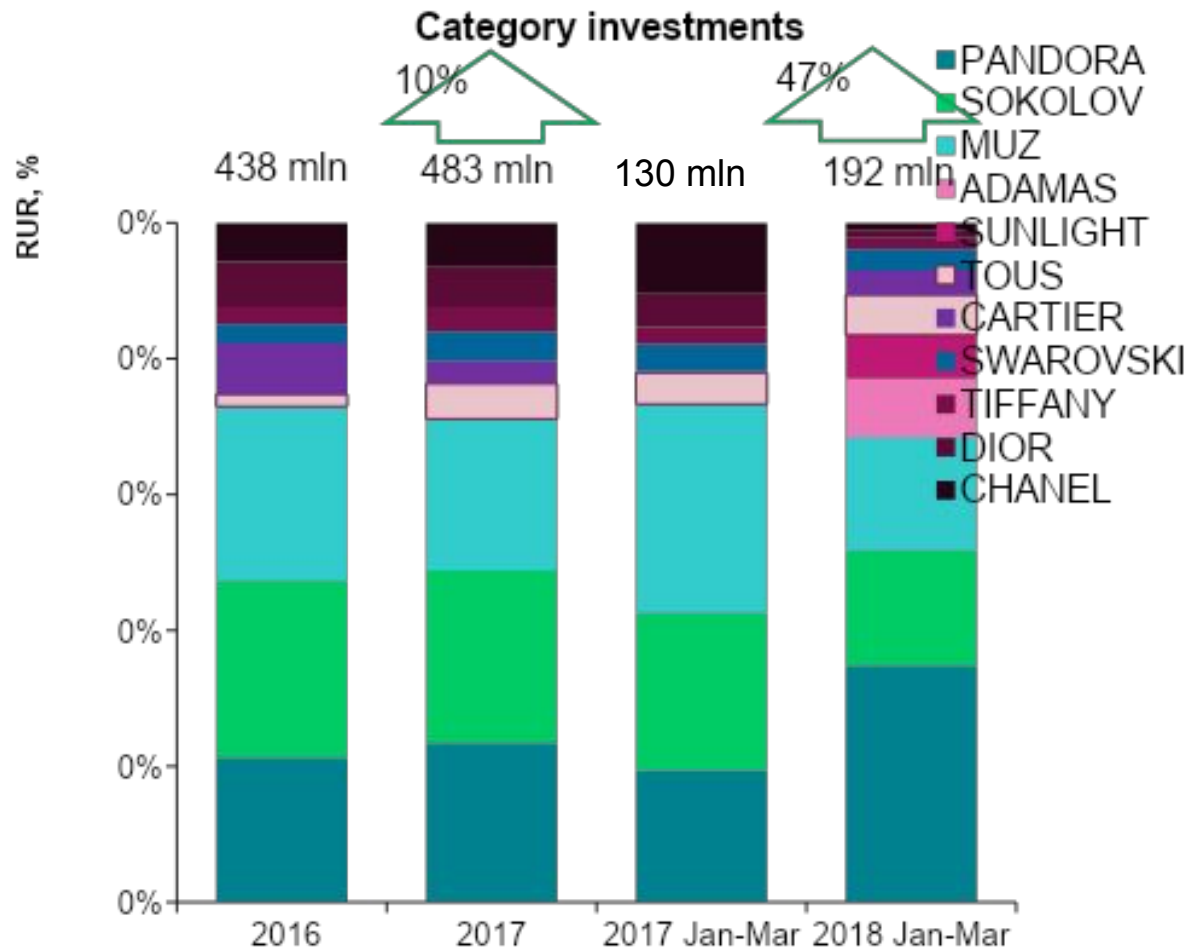


Focus on earrings and rings in ad message.



Advertising Investments in the Jewelry Category

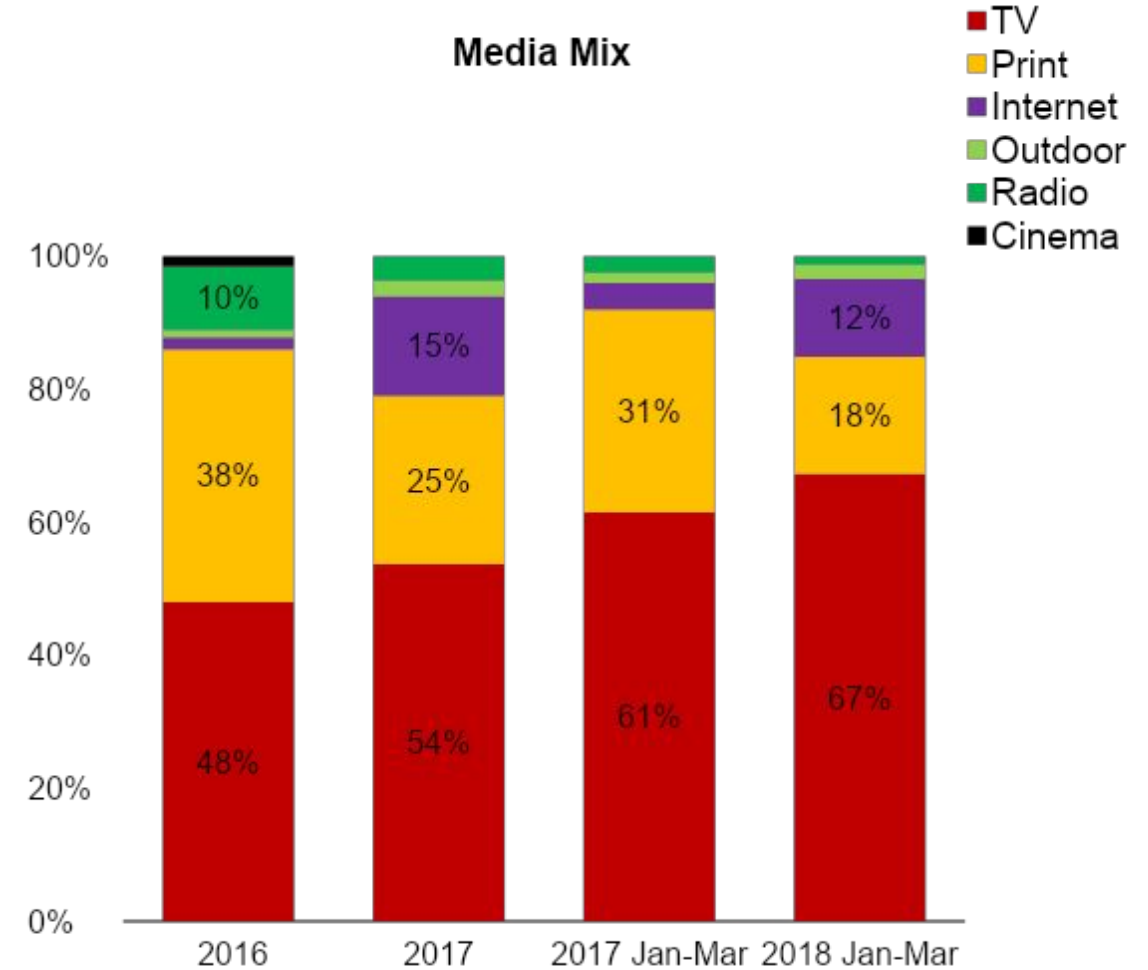
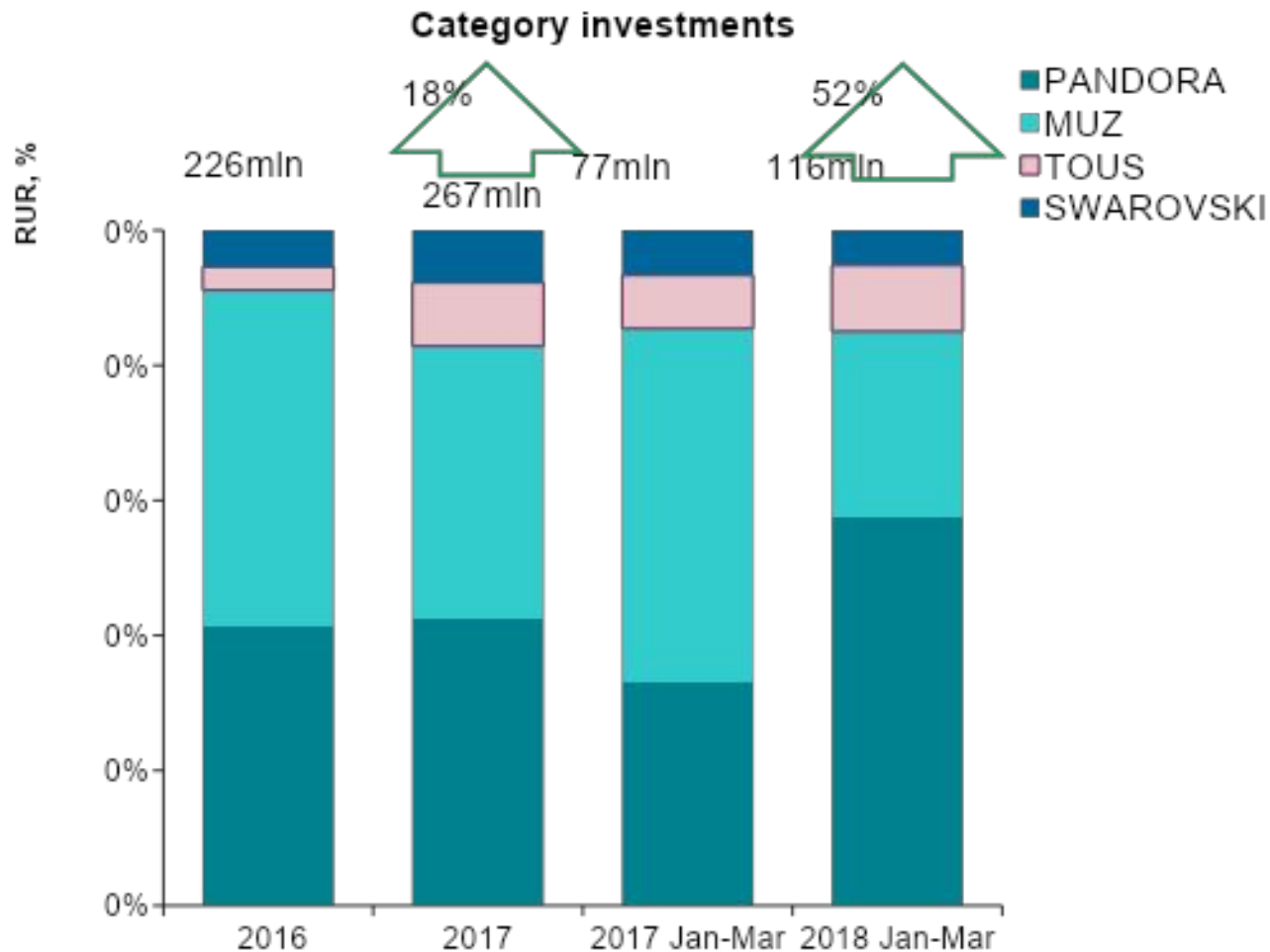
- The trend shows increase of media investments in the category of Jewelry
- There are 2 prevalent channels in the category TV and Print media.





Advertising Investments by TOUS, Swarovski, MUZ, Pandora

- The trend shows an increase of media investments
- 2 prevalent channels remain to be TV and Printed media.

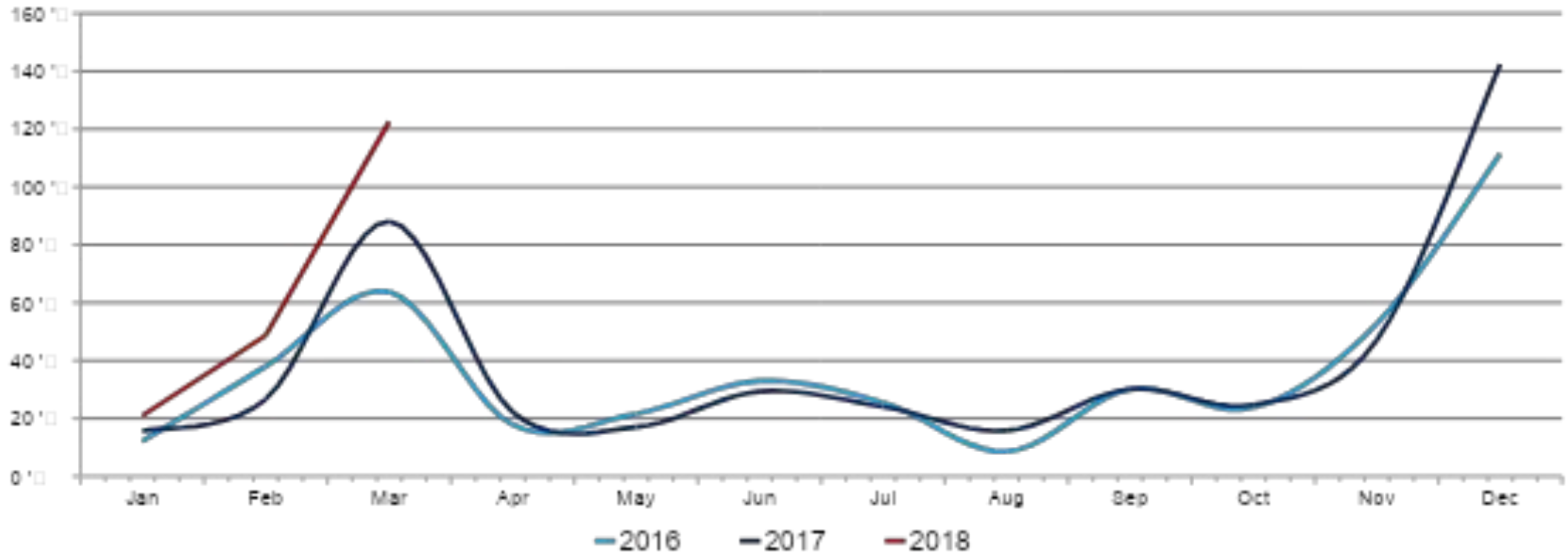


Source: MediaScope, 2016 – 2018, UM estimation



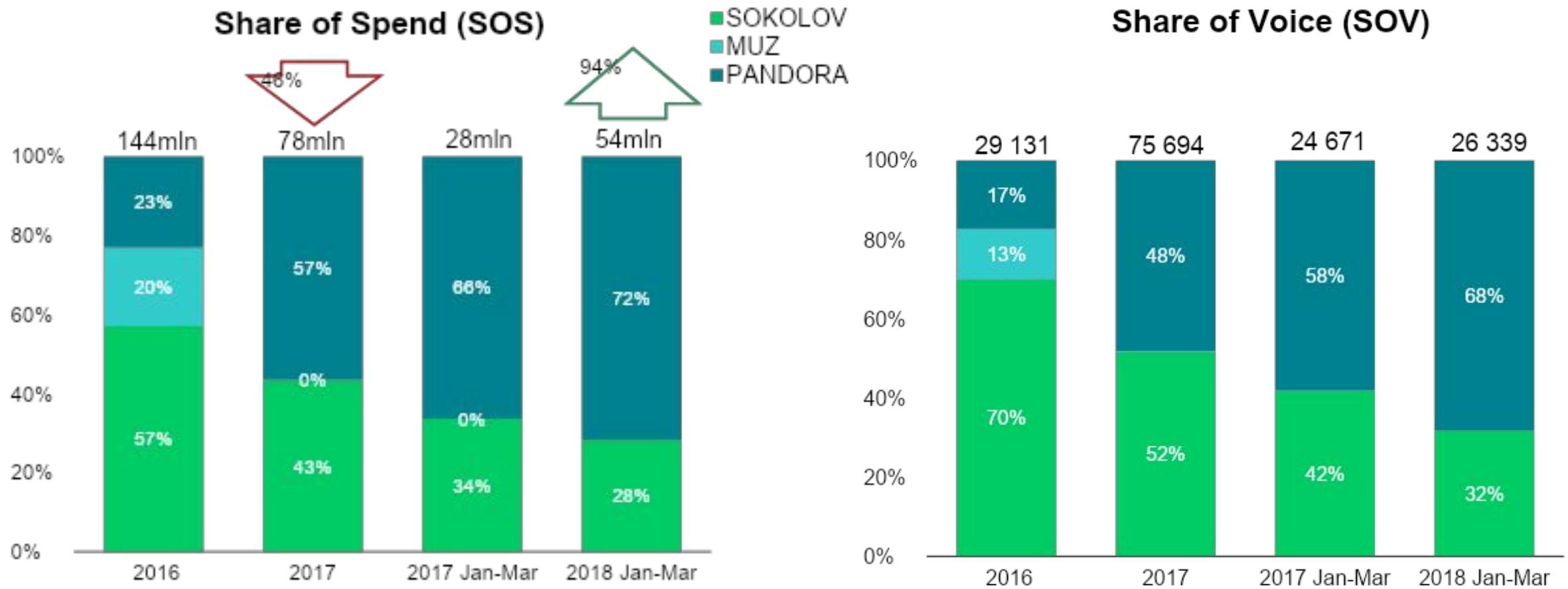
Seasonality shows clearly peaks in the gender holidays and New Year's celebration

Media Investments dynamics





SOS vs SOV on Nat TV – Sokolov’s investments are the most efficient in terms of Nat TV





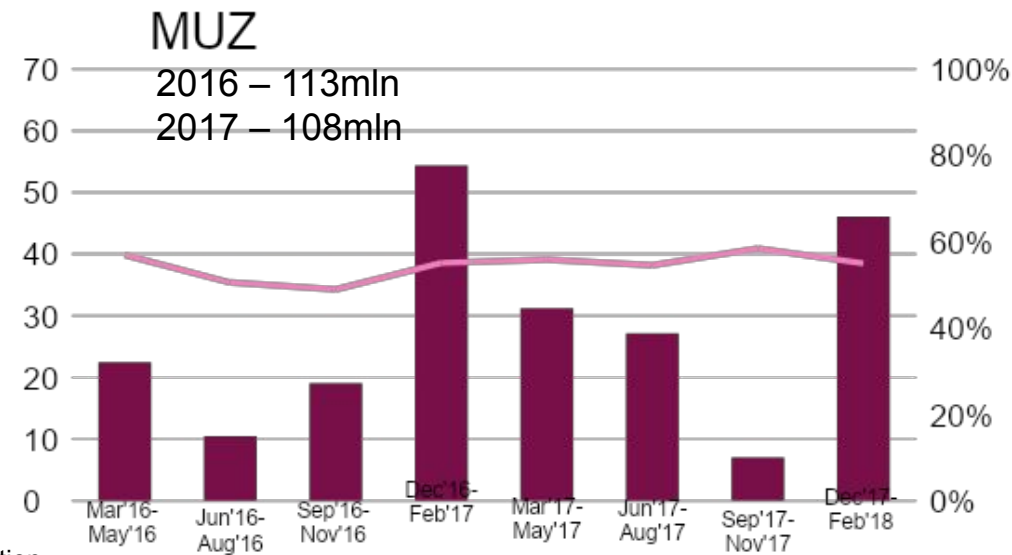
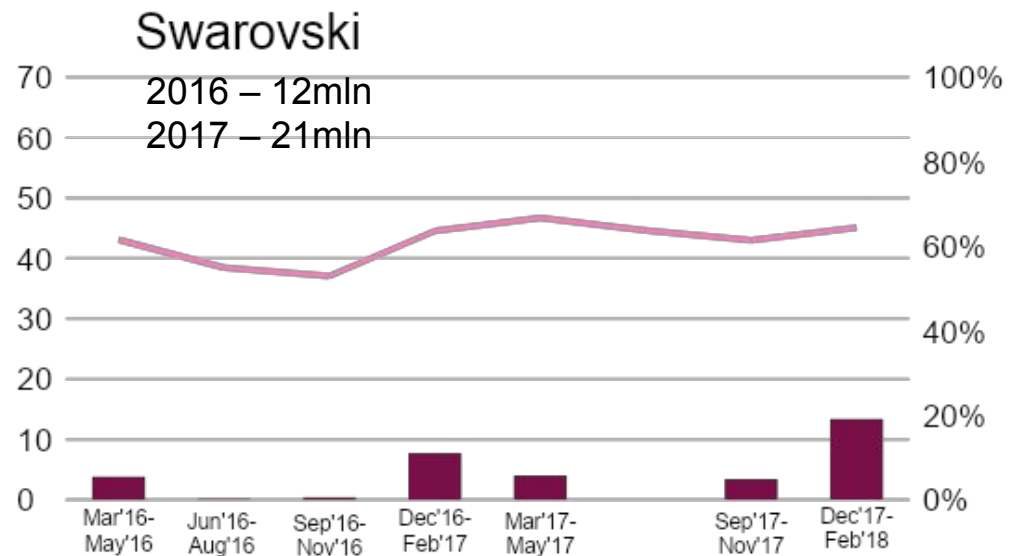
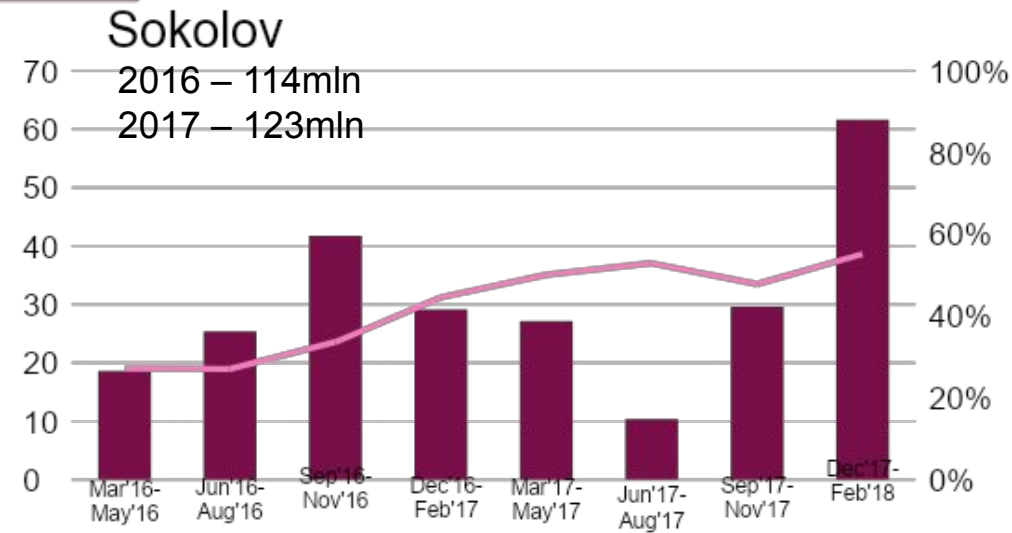
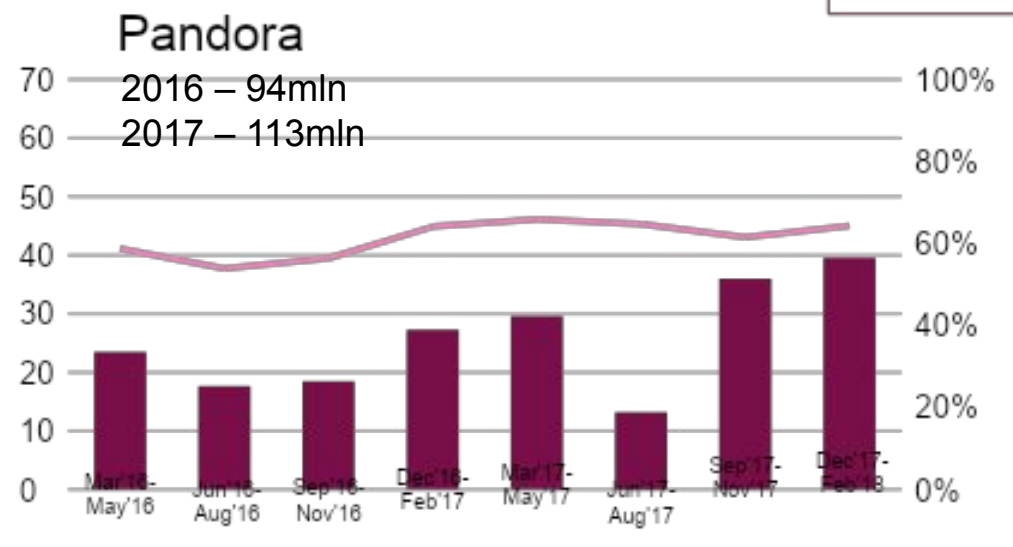
Regional TV – Sokolov and Moskow Jewelry Plant massively support their products in various cities

2016	Regional TRP's	SOKOLOV	MUZ	2017	Regional TRP's	SOKOLOV	MUZ	SWAROVSKI	TOUS	Jan-Mar 2018	Regional TRP's	SOKOLOV	MUZ	PANDORA	ADAMAS
1	Chelyabinsk	532	2	1	Chelyabinsk	781				1	Chelyabinsk	1833			
2	Ekaterinburg	470	541	2	Ekaterinburg	1589	2790			2	Ekaterinburg		607	287	164
3	Irkutsk	996		3	Irkutsk	2975				3	Irkutsk	1380			
4	Kazan	2921	558	4	Izhevsk	336				4	Izhevsk	174			
5	Khabarovsk	777		5	Kazan	2276	2782			5	Kazan		621	138	
6	Krasnodar	636	1123	6	Kemerovo	809				6	Khabarovsk	1051			
7	Krasnoyarsk	593		7	Khabarovsk	840				7	Krasnodar	1113	491	123	
8	Moscow		2062	8	Krasnodar	2908	2367		484	8	Moscow		1054	444	456
9	Nizhniy Novgorod	975	459	9	Krasnoyarsk	1976				9	Nizhniy Novgorod	452	492	477	118
10	Novosibirsk	232	808	10	Moscow		5394	423		10	Novosibirsk		347	97	
11	Omsk	515		11	Nizhniy Novgorod	384	2504	423		11	Perm	1675			
12	Perm		384	12	Novosibirsk	2834	2193		905	12	Rostov-On-Don	1057	548	463	
13	Rostov-On-Don	673	671	13	Omsk	1995				13	Saint-Petersburg		1099	362	
14	Saint-Petersburg		1319	14	Perm	1969	102			14	Samara		852		239
15	Samara	524	847	15	Rostov-On-Don	2728	1385		501	15	Saratov	493			
16	Saratov	1008	661	16	Saint-Petersburg	2511	3009		843	16	Stavropol	1550	813		
17	Stavropol	576	755	17	Samara	834	2360			17	Tver		3		
18	Tula	222	162	18	Saratov	3128	169			18	Tyumen	496	763		
19	Tver		119	19	Stavropol	2270	2753			19	Vladivostok	1108			13
20	Tyumen	495	634	20	Tula	267	46			20	Volgograd				125
21	Ufa	726	585	21	Tver		92			21	Voronezh	986		257	134
22	Vladivostok	175		22	Tyumen	844	2298								
23	Volgograd	489	254	23	Ufa	663	153								
24	Voronezh	744	375	24	Vladivostok	1346									
				25	Voronezh	2868									
				26	Yaroslavl	1003									



Investments – Awareness correlation. Generally awareness rises with investments and may have accumulative effect in the following quarter after the quarter of ad running.

■ Spend — Awareness

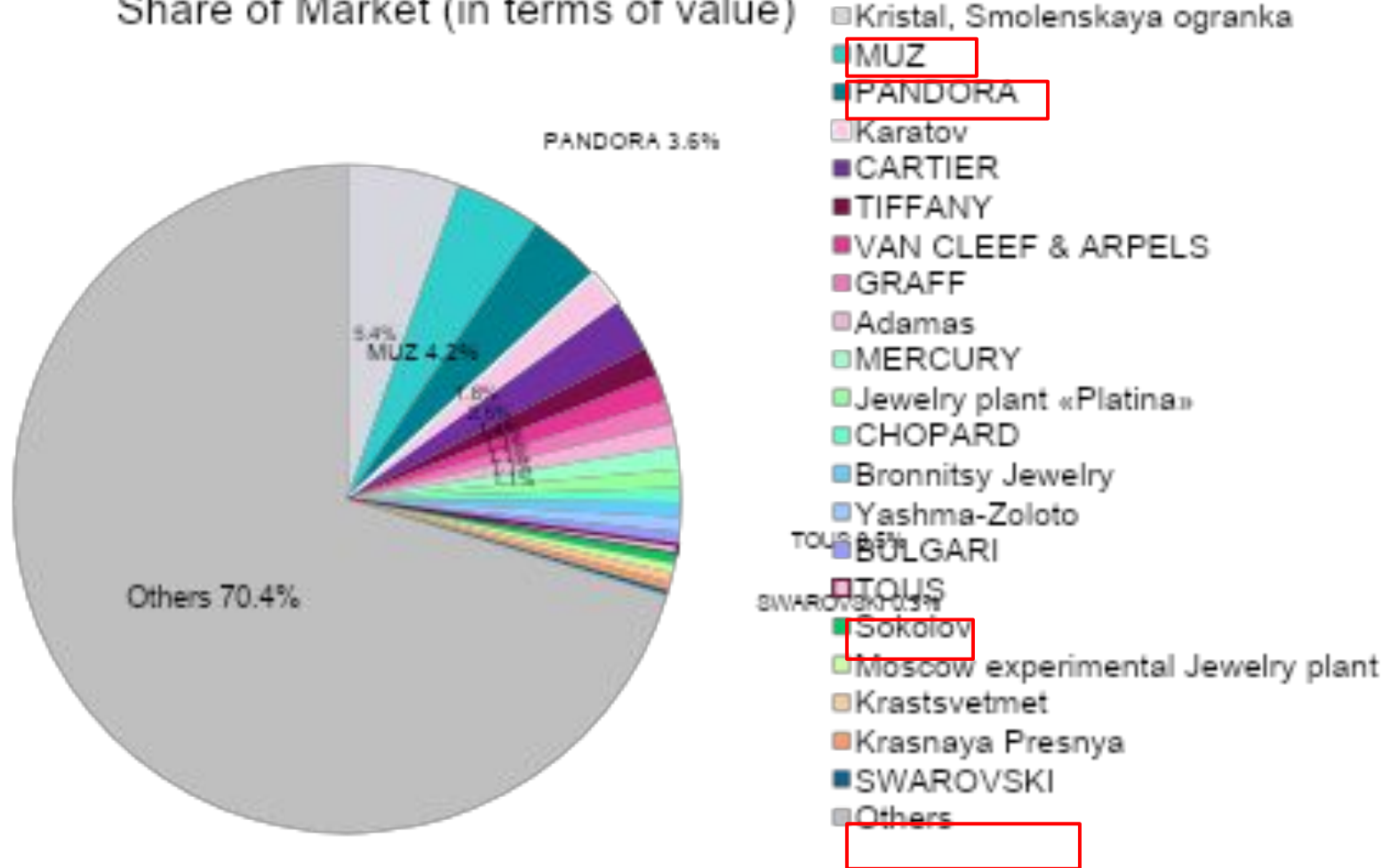


Source: MediaScope, M'Index, H1 2016, H2 2016, H1 2017, H2 2017, W 25-45 BC, 2016 – 2017, UM estimation

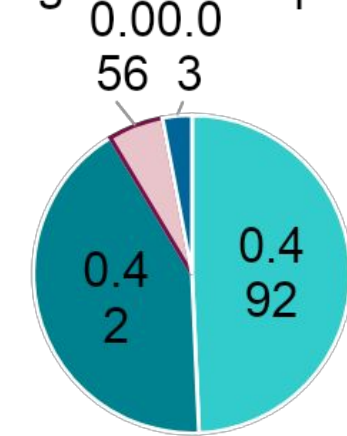


Share of TOUS jewelry turnover among the main competitors in Russia in 2017

Share of Market (in terms of value)



Share of Market among main competitors



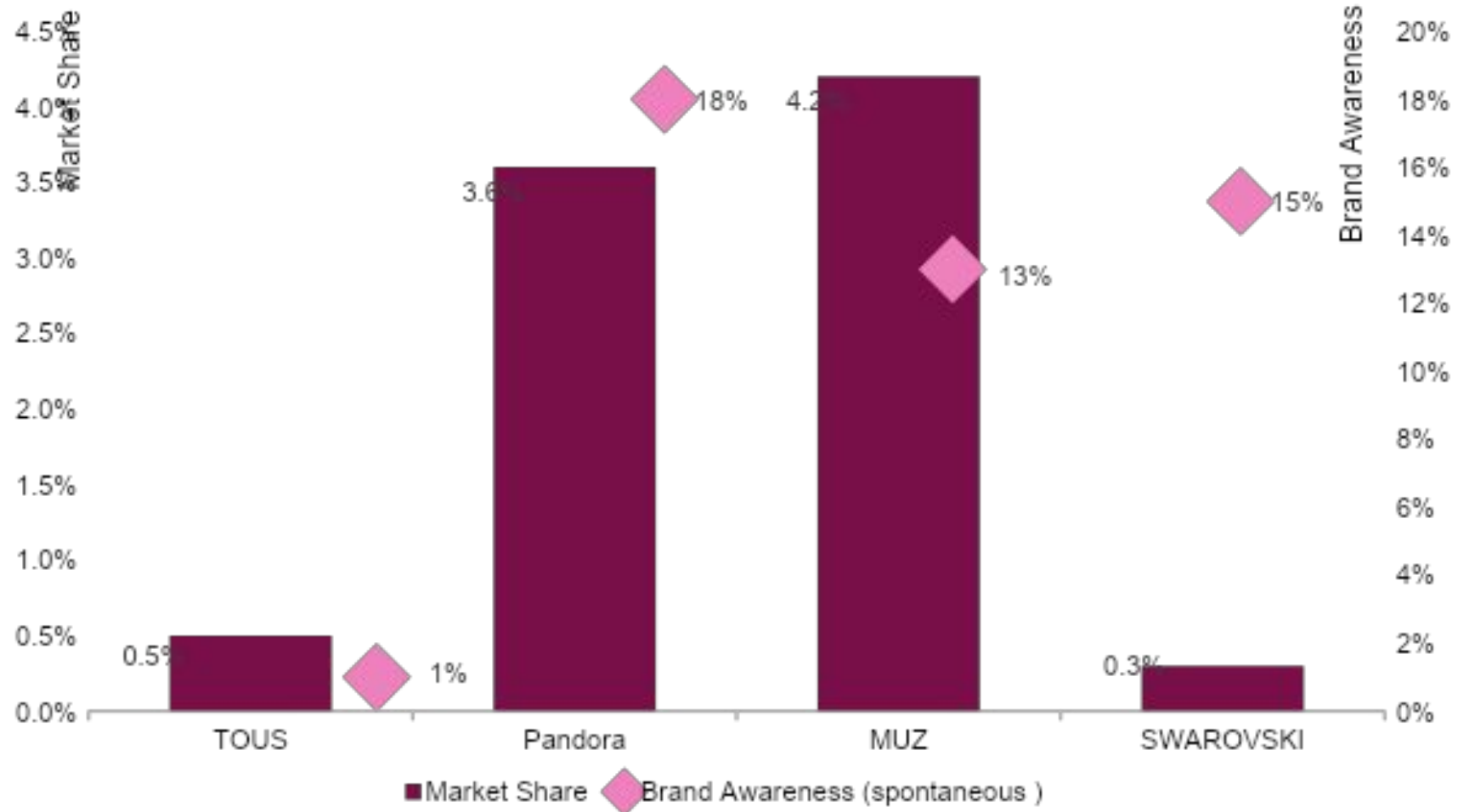
	From total jewelry market*	From main competitors*
Tous SOM	0,5%	6%
	16 th place	3 rd place

*By sales volume on jewelry market

** By the volume turnover of competitors: MUZ, Swarovski и Pandora



Relation between Market Share* and Spontaneous Brand Awareness in 2017 is not obvious in regard to Russian Market.



* according to Jewelry Report 2017

