

# The Tabletop Report 2009

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|  |           |
|--|-----------|
| <b>INTRODUCTION .....</b>  | <b>13</b> |
| Objectives of the Research Study .....   | 13        |
| Consumer Survey Delves Deeply into Purchase Behavior and Motivation.....   | 15        |
| Specific Products, Brands and Data Points Presented in this Study.....   | 16        |
| Demographics.....  | 16        |
| Tabletop Products They Have and Own and Trends in Usage .....  | 17        |
| Whether Any Tabletop Items Are Collected.....  | 17        |
| Definition of Luxury in their Lifestyle .....  | 18        |
| Recent Tabletop Purchases .....  | 18        |
| Tabletop Products Purchased, Amount Spent and Where Bought.....  | 19        |
| Categories of Stores Included in Study .....   | 23        |
| What Influenced Tabletop Buyers in their Purchases .....   | 24        |
| Special Investigation: Bridal or Gift Registries as Influencing Consumers .....  | 25        |
| Special Investigation: Role of the Internet.....   | 25        |
| More about Shopping for Tabletop.....  | 25        |
| Special Investigation: How the Current Economic Crisis is Impacting the Tabletop Shopper and the Trends on Future Spending on Tabletop ..... | 26        |
| Attitudes about Tabletop Usage and Purchasing .....  | 27        |
| Tabletop Brands and Store Brands Included in the Survey.....   | 27        |
| Retail Brands .....  | 29        |
| <b>CHAPTER 1: DEMOGRAPHICS OF THE TABLETOP FURNISHINGS' CONSUMERS.....</b>   | <b>32</b> |
| Defining Tabletop Marketers' Primary Target Market .....   | 32        |
| Tabletop Purchase Incidence.....   | 33        |
| <i>Figure 1: Total Purchase Incidence of Tabletop Products (2008 &amp; 2006 surveys)</i> .....   | 33        |
| >> Tabletop Marketers: Take Action .....   | 34        |
| Demographics that Define the Consumer Market for Tabletop Products .....   | 35        |
| Gender of Tabletop.....  | 35        |
| <i>Figure 2: Gender Distribution (2008 &amp; 2006 Surveys)</i> .....   | 35        |
| Age of Tabletop Consumers.....   | 36        |
| <i>Figure 3: Age of Tabletop Consumers (2008 &amp; 2006 Surveys)</i> .....   | 36        |

# The Tabletop Report 2009

---

|   |        |
|---|--------|
| Marital Status .....  | 37     |
| Household Income .....  | 37     |
| <i>Figure 4: Household Income of Tabletop Consumers (2008 &amp; 2006 Luxury Surveys)</i> .....                                | 37     |
| Home Ownership.....   | 38     |
| Presence of Children .....  | 39     |
| Ethnicity .....   | 39     |
| <i>Figure 5: Ethnicity (2008 &amp; 2006)</i> .....  | 39     |
| Occupation.....   | 40     |
| <i>Figure 6: Occupations of Tabletop Consumers (2008 Survey)</i> .....  | 40     |
| Education Levels.....   | 41     |
| <i>Figure 7: Education Levels (2008 &amp; 2006 Surveys)</i> .....   | 41     |
| <br><b>What They Have, What They Own .....</b>  | <br>42 |
| Tabletop Sets Owned .....   | 42     |
| <i>Figure 8: What Tabletop Collections Tabletop Buyers Own (2008 Survey)</i> .....  | 42     |
| Trends in Usage of Formal Dinnerware .....  | 43     |
| <i>Figure 9: Trends in Using Formal Dinnerware Service (2008 Survey)</i> .....  | 43     |
| >> Tabletop Marketers: Take Action to Reverse Downward Trend in Formal Dinnerware Usage .....                                 | 44     |
| What Would You Add to Your Formal Dinnerware Service?.....  | 45     |
| <i>Figure 10: What Consumers Would Add to Formal Dinnerware Collection (2008 Survey)</i> .....                                | 45     |
| How Much They Paid for their Formal Dinnerware and How Much They Would Expect to Pay for a New Five-Piece Place Setting ..... | 46     |
| <i>Figure 11: How Much Paid for Fine Dinnerware and How Much Plan to Pay for New Fine Dinnerware (2008 Survey)</i> .....      | 46     |
| What Tabletop They Collect .....  | 47     |
| <i>Figure 12: Tabletop Items Collected (2008 &amp; 2006 Survey)</i> .....   | 47     |
| <br><b>Role of Luxury in their Lifestyles.....</b>  | <br>48 |
| <i>Figure 13: Definition of Luxury (Tabletop &amp; Home Surveys)</i> .....  | 48     |
| >> Take Action Tabletop Marketers: Explore New Dimensions of Luxury for Consumers.....  | 49     |
| Luxury as Part of the Tabletop Consumers' Lifestyle .....   | 50     |
| <i>Figure 14: Tabletop Consumers Lifestyle and Approach to Living (2008 Survey)</i> .....                                     | 50     |
| >>Take Action Tabletop Marketers: How to Position Products for Maximum Appeal to the High-Value Consumers .....               | 51     |
| <br><b>CHAPTER 2: ABOUT SALES &amp; GROWTH IN THE TABLETOP MARKET .....</b>   | <br>53 |
| <br><b>Tabletop Market Sales &amp; Growth, 2000-2008.....</b>   | <br>54 |
| <i>Figure 15: Tabletop Consumer Market, Sales &amp; Growth 2000- 2008</i> .....   | 54     |
| Tabletop Market Is Segment of the Housewares Market .....   | 55     |
| <i>Figure 16: Market Growth Housewares and Tabletop, 2000-2007</i> .....  | 55     |

# The Tabletop Report 2009

---

|  |           |
|--|-----------|
| <b>Tabletop Market Sales 2006 &amp; 2008 .....</b>   | <b>56</b> |
| Dinnerware Product Sales.....  | 56        |
| <i>Figure 17: Dinnerware Market by Type of Product and Style, 2006 &amp; 2008.....</i>                     | 56        |
| Glassware, Crystal and Barware Product Sales.....  | 57        |
| <i>Figure 18: Glassware, Crystal and Barware Market by Type of Item, 2006 &amp; 2008.....</i>              | 57        |
| Flatware Product Sales .....   | 58        |
| <i>Figure 19: Flatware Market by Product Type 2006 &amp; 2008.....</i>                                     | 58        |
| Servingware Product Sales .....  | 59        |
| <i>Figure 20: Servingware Market by Product Type, 2008 .....</i>   | 59        |
| <i>Figure 21: Servingware Market by Material, 2008.....</i>  | 60        |
| Tabletop Decorative Accessories Product Sales.....   | 61        |
| <i>Figure 22: Decorative Accessories Market by Product Type, 2008.....</i>                                 | 61        |
| <i>Figure 23: Decorative Accessories Market by Materials, 2008.....</i>                                    | 61        |
| Other Table Accessories Product Sales .....  | 62        |
| <i>Figure 24: Other Table Accessories Market by Product Form, 2008.....</i>                                | 62        |
| <b>Tabletop Sales by Channel of Distribution .....</b>   | <b>63</b> |
| <i>Figure 25: Tabletop Sales by Channel of Distribution 2006 &amp; 2008 .....</i>                          | 63        |
| Tabletop Product Category Sales by Channel of Distribution .....   | 64        |
| <i>Figure 26: Tabletop Product Sales by Channel of Distribution, 2008 .....</i>                            | 65        |
| → Key Finding: Implications of Industry Sales and Channel of Distribution Data for Tabletop Marketers..... | 66        |
| <b>CHAPTER 3: ABOUT CONSUMERS &amp; THEIR TABLETOP PRODUCT PURCHASES.....</b>                              | <b>68</b> |
| <b>What Products They Purchased .....</b>  | <b>69</b> |
| <i>Figure 27: Tabletop Purchases Past Year (2006 &amp; 2008).....</i>                                      | 69        |
| >>Tabletop Marketers: Take Action .....  | 70        |
| Demographic Distinctions in Tabletop Goods Purchases.....  | 71        |
| >>Tabletop Marketers: Take Action .....  | 72        |
| Type of Tabletop Bought For Self or As Gift .....  | 73        |
| <i>Figure 28: Type of Tabletop Purchased for Self or as Gift (2008).....</i>                               | 73        |
| >> Tabletop Marketers: Take Action .....   | 74        |
| <b>Spending on Tabletop .....</b>  | <b>75</b> |
| <i>Figure 29: Spending on Tabletop Goods (2006 &amp; 2008).....</i>  | 75        |
| >> Tabletop Marketers: Take Action .....   | 75        |
| Tabletop Spending by Income .....  | 76        |

# The Tabletop Report 2009

---

|   |           |
|---|-----------|
| <i>Figure 30: Tabletop Spending by Income Segment (2008) .....</i>  | 76        |
| >>Tabletop Marketers: Take Action .....   | 77        |
| Tabletop Spending by Gender .....   | 77        |
| <i>Figure 31: Tabletop Spending by Gender (2008).....</i>   | 77        |
| Tabletop Spending by Generation .....   | 78        |
| <i>Figure 32: Tabletop Spending by Generation (2008) .....</i>  | 78        |
| >>Tabletop Marketers: Take Action .....   | 78        |
| <b>Features that Influenced Most Recent Tabletop Purchase.....</b>  | <b>79</b> |
| <i>Figure 33: Features Rated Extremely/Very Important in Most Recent Tabletop Purchase (2008).....</i>  | 79        |
| Primary Reason Why Made Most Recent Tabletop Purchase.....  | 80        |
| <i>Figure 34: Primary Reason Why Made Most Recent Tabletop Purchase (2008) .....</i>  | 80        |
| >>Tabletop Marketers: Take Action .....   | 81        |
| <b>Where Made Most Recent Tabletop Purchase .....</b>   | <b>82</b> |
| <i>Figure 35: Where Tabletop Shoppers Made Most Recent Purchases (2006 &amp; 2008).....</i>   | 82        |
| Demographic Distinctions in Place of Tabletop Purchase.....   | 83        |
| <b>CHAPTER 4: DETAILS ABOUT TABLETOP PRODUCT PURCHASES.....</b>   | <b>84</b> |
| <b>Details about Dinnerware Purchases .....</b>   | <b>85</b> |
| Type of Dinnerware Products Bought .....  | 85        |
| <i>Figure 36: Type of Dinnerware Products Bought in Past Year (2006 &amp; 2008).....</i>  | 85        |
| Style of Dinnerware Bought .....  | 86        |
| <i>Figure 37: Style of Dinnerware Bought (2006 &amp; 2008).....</i>   | 86        |
| Spending on Dinnerware by Demographic Segment .....   | 87        |
| <i>Figure 38: Tabletop Spending by Demographic Segment (2008) .....</i>   | 87        |
| More about the Most Recent Dinnerware Purchase .....  | 88        |
| <i>Figure 39: About last dinnerware purchase, was it bought as gift or for self and if gift, from a register; on sale or at regular price; a luxury or ordinary brand; bought due to need or desire (2008).....</i> | 88        |
| >>Tabletop Marketers: Take Action on Premium or Luxury Brand Positioning for Dinnerware .....   | 89        |
| <b>Details about Glassware, Crystal and/or Barware Purchases.....</b>   | <b>90</b> |
| Type of Glassware Bought .....  | 90        |
| <i>Figure 40: Type of Glassware Products Bought in Past Year (2008).....</i>  | 90        |
| Spending on Glassware by Demographic Segment .....  | 91        |
| <i>Figure 41: Glassware Spending by Demographic Segment (2008) .....</i>  | 91        |
| More about the Most Recent Glassware Purchase .....   | 92        |

# The Tabletop Report 2009

---

|  |     |
|--|-----|
| <i>Figure 42: About last glassware purchase, was it bought as gift or for self and if gift, from a register; was it bought on sale or at regular price; a luxury or ordinary brand; bought due to need or desire (2008).....</i>               | 92  |
| <b>Details about Flatware Purchases.....</b>   | 94  |
| Type of Flatware Products Bought .....   | 94  |
| <i>Figure 43: Type of Flatware Products Bought in Past Year (2008).....</i>  | 94  |
| Spending on Flatware by Demographic Segment.....   | 95  |
| <i>Figure 44: Flatware Spending by Demographic Segment (2008).....</i>   | 95  |
| More about the Most Recent Flatware Purchase.....  | 96  |
| <i>Figure 45: About last flatware purchase, was it bought as gift or for self and if gift, from a register; bought on sale or at regular price; a luxury or ordinary brand; bought due to need or desire (2008) .....</i>                      | 96  |
| <b>Details about Servingware Purchases.....</b>  | 98  |
| Type of Servingware Bought .....   | 98  |
| <i>Figure 46: Type of Servingware Bought in Past Year (2008).....</i>  | 98  |
| Material of Servingware .....  | 99  |
| <i>Figure 47: Material of Servingware Bought (2006 &amp; 2008) .....</i>   | 99  |
| Spending on Servingware by Demographic Segment.....  | 100 |
| <i>Figure 48: Servingware Spending by Demographic Segment (2008).....</i>  | 100 |
| More About the Most Recent Servingware Purchase .....  | 101 |
| <i>Figure 49: About last servingware purchase, was it bought as gift or for self and if gift, from a register; was it bought on sale or at regular price; a luxury or ordinary brand; bought due to need or desire (2008) .....</i>            | 101 |
| <b>Details about Tabletop Decorative Accessories, Gifts or Collectibles Purchases .....</b>  | 103 |
| Type of Decorative Accessories Bought .....  | 103 |
| <i>Figure 50: Type of Decorative Accessories Bought in Past Year (2008y).....</i>  | 103 |
| Material of Decorative Accessories .....   | 104 |
| <i>Figure 51: Material of Decorative Accessories Bought (2006 &amp; 2008) .....</i>  | 104 |
| Spending on Decorative Accessories by Demographic Segment .....  | 105 |
| <i>Figure 52: Decorative Accessories Spending by Demographic Segment (2008).....</i>   | 105 |
| More about the Most Recent Decorative Accessories Purchase.....  | 106 |
| <i>Figure 53: About last decorative accessories purchase, was it bought as gift or for self and if gift, from a register; was it bought on sale or at regular price; a luxury or ordinary brand; bought due to need or desire (2008) .....</i> | 106 |
| <b>Details about Other Tabletop Accessories Purchases .....</b>  | 108 |
| Type of Other Tabletop Accessories Bought.....   | 108 |
| <i>Figure 54: Type of Other Tabletop Accessories Bought in Past Year (2008).....</i>   | 108 |
| Spending on Decorative Accessories by Demographic Segment .....  | 109 |

# The Tabletop Report 2009

---

|   |            |
|---|------------|
| <i>Figure 55: Other Tabletop Accessories Spending by Demographic Segment (2008) .....</i>   | 109        |
| More about the Most Recent Other Tabletop Accessories Purchase .....  | 110        |
| <i>Figure 56: About last other tabletop accessories purchase, was it bought as gift or for self and if gift, from a register; was it bought on sale or at regular price; a luxury or ordinary brand; bought due to need or desire (2008).....</i> | 110        |
| <b>Summary of Motivations for Most Recent Purchase of Specific Tabletop Products.....</b>   | <b>112</b> |
| <i>Figure 57: : About last tabletop purchase, was it bought as gift or for self and if gift, from a register; was it bought on sale or at regular price; a luxury or ordinary brand; bought due to need or desire (2008).....</i>                 | 112        |
| >>Tabletop Marketers: Take Action .....   | 113        |
| <b>CHAPTER 5: ABOUT SHOPPING FOR TABLETOP .....</b>   | <b>114</b> |
| <b>Special Investigation — Role of the Internet in Tabletop Purchases.....</b>  | <b>114</b> |
| Ways Tabletop Consumers Used the Internet in Support of Tabletop Purchases or Table Setting Ideas .....   | 115        |
| <i>Figure 58: Specific Ways Tabletop Consumers Used the Internet in Past Year (2008).....</i>   | 115        |
| >> Tabletop Marketers: Take Action .....  | 116        |
| Features that Influence How Consumers Shop for Tabletop Items Online .....  | 117        |
| <i>Figure 59: Features of Internet Shopping that Are Very or Extremely Important to Tabletop Shoppers (2008).....</i>   | 117        |
| <b>Types of Stores Where Tabletop Consumers Regularly Shop .....</b>  | <b>118</b> |
| <i>Figure 60: Where Shopped for Tabletop Regularly, Occasionally, Rarely or Never (2008) .....</i>  | 118        |
| Trends in Where Tabletop Consumers Shop.....  | 119        |
| <i>Figure 61: Where Tabletop Consumers Made Purchases, 2006 &amp; 2008.....</i>   | 119        |
| >>Tabletop Marketers: Take Action .....   | 120        |
| Favorite Stores for Tabletop Shoppers .....   | 121        |
| <i>Figure 62: Typical Stores Where Consumers Shop for Home Items (General Survey).....</i>  | 122        |
| <b>Experiences Rated Important in Influencing Tabletop Consumers to Shop.....</b>   | <b>124</b> |
| <i>Figure 63: Shopping Experiences Rated Very or Extremely Important (2008).....</i>  | 124        |
| Activities that Influence the Tabletop Shopper Most.....  | 125        |
| <i>Figure 64: Shopping Activities That Influence the Tabletop Shopper (2008).....</i>   | 125        |
| Role of Bridal or Gift Registry in Influencing the Tabletop Shopper .....   | 126        |
| <i>Figure 65: Influence of Bridal or Gift Registry in Where Shopped (2006 &amp; 2008).....</i>  | 126        |
| >>Tabletop Marketers: Take Action .....   | 126        |
| <b>CHAPTER 6: TRENDS IN TABLETOP SHOPPING .....</b>   | <b>128</b> |

# The Tabletop Report 2009

---

|  |                |
|--|----------------|
| <b>Including Influence of Current Recession .....</b>  | <b>128</b>     |
| Trends in Shopping for Tabletop Now compared with Year Ago.....  | 128            |
| <i>Figure 66: Trends in Tabletop Shopping this Year (2008) .....</i>   | 128            |
| Trends in Future Tabletop Shopping .....   | 129            |
| <i>Figure 67: Trends in Tabletop Shopping in Coming Year (2008) .....</i>                                      | 129            |
| Changes Tabletop Consumers Are Making in Response to Current Economic Situation .....                          | 130            |
| <i>Figure 68: Changes to Tabletop Consumers Lifestyle in Response to Economic Crisis (2008).....</i>           | 130            |
| >>Tabletop Marketers: Take Action .....  | 131            |
| <br><b>CHAPTER 7: TABLETOP BRANDS .....</b>  | <br><b>132</b> |
| <i>Figure 69: Tabletop Brands Purchased (2006 &amp; 2008) .....</i>  | 132            |
| Role of Bridal or Gift Registry in Tabletop Brands Purchased.....  | 133            |
| <i>Figure 70: Influence of Bridal or Gift Registry on Tabletop Brands Consumers Buy (2006 &amp; 2008).....</i> | 133            |
| Role of Brand in New Purchase .....  | 133            |
| <i>Figure 71: Role of Brand in Influencing New Tabletop Purchases (2008) .....</i>                             | 133            |
| Brands Tabletop Consumers Would Consider to New Purchases .....  | 134            |
| >>Tabletop Marketers: Take Action .....  | 134            |
| <i>Figure 72: Tabletop Brands Consumers Would Consider for New Purchases (2008).....</i>                       | 134            |
| <br><b>CHAPTER 8: ABOUT TABLETOP CONSUMERS' ATTITUDES AND PERSONALITIES.....</b>                               | <br><b>135</b> |
| <br><b>Attitudes about Tabletop .....</b>  | <br><b>136</b> |
| <i>Figure 73: Attitudes about Tabletop (2008).....</i>   | 137            |
| <br><b>Four Different Personalities of Tabletop Consumers Emerged.....</b>                                     | <br><b>139</b> |
| <i>Figure 74: Tabletop Personalities (2008).....</i>   | 139            |
| >> Tabletop Marketers: Take Action .....   | 141            |
| Neo-Conservative Connie/Conrad is neither hot or cold about tabletop .....                                     | 141            |
| Everyday Evelyn wants it easy, quick and casual.....   | 142            |
| Formerly-Formal Frances Bought Formal Once, but Today She Has a New Casual Lifestyle.....                      | 143            |
| Traditional Terry Has Use for Formal Tabletop.....   | 144            |
| >> Tabletop Marketers: Take Action .....   | 145            |
| <i>Figure 75: Personalities Purchase of Luxury Brands (2008).....</i>  | 145            |
| How the Personalities Answered Each Attitude Question.....   | 146            |
| <i>Figure 76: Attitude Statements by Personalities (2008).....</i>   | 148            |
| Field Guide to the Tabletop Consumer Personalities.....  | 149            |
| <i>Figure 77: Field Guide to the Home Consumer Personalities.....</i>  | 150            |

# The Tabletop Report 2009

---

|   |            |
|---|------------|
| <b>CHAPTER 9: ABOUT MAXIMIZING SALES TO THE TABLETOP CONSUMER MARKET .....</b>  | <b>151</b> |
| <b>Trends in Tabletop Purchase Incidence .....</b>                              | <b>151</b> |
| → Strategies for Tabletop Marketers to Maximize Sales:.....                     | 152        |
| <b>Demographics that Define the Consumer Market for Tabletop Products .....</b> | <b>153</b> |
| Gender of Tabletop.....   | 153        |
| Age of Tabletop Consumers.....  | 153        |
| Marital Status .....  | 154        |
| Household Income.....   | 154        |
| Home Ownership.....   | 154        |
| Presence of Children.....   | 155        |
| Ethnicity .....   | 155        |
| Occupation.....   | 155        |
| Education Levels .....  | 156        |
| <b>What They Have, What They Own .....</b>                                      | <b>157</b> |
| Tabletop Sets Owned .....   | 157        |
| Trends in Usage of Formal Dinnerware .....                                      | 157        |
| → Strategies for Tabletop Marketers to Maximize Sales:.....                     | 158        |
| What Would You Add to Your Formal Dinnerware Service?.....                      | 159        |
| → Strategies for Tabletop Marketers to Maximize Sales:.....                     | 159        |
| What Tabletop They Collect.....   | 160        |
| <b>Role of Luxury in their Lifestyles.....</b>                                  | <b>160</b> |
| → Strategies for Tabletop Marketers to Maximize Sales:.....                     | 161        |
| Luxury as Part of the Tabletop Consumers' Lifestyle .....                       | 161        |
| → Strategies for Tabletop Marketers to Maximize Sales:.....                     | 162        |
| <b>About Sales &amp; Growth in the Tabletop Market .....</b>                    | <b>164</b> |
| Dinnerware Product Sales.....   | 164        |
| Glassware, Crystal and Barware Product Sales.....                               | 165        |
| Flatware Product Sales .....  | 165        |
| Servingware Product Sales .....   | 166        |
| Tabletop Decorative Accessories Product Sales.....                              | 166        |
| Other Table Accessories Product Sales .....                                     | 167        |
| Tabletop Sales by Channel of Distribution .....                                 | 167        |
| Tabletop Product Category Sales by Channel of Distribution .....                | 167        |

# The Tabletop Report 2009

---

|  |            |
|--|------------|
| → Strategies for Tabletop Marketers to Maximize Sales:           | 168        |
| <b>About Consumers &amp; Their Tabletop Product Purchases</b>    | <b>170</b> |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 170        |
| Demographic Distinctions in Tabletop Goods Purchases             | 171        |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 172        |
| Type of Tabletop Bought For Self or As Gift                      | 173        |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 173        |
| <b>Spending on Tabletop</b>                                      | <b>174</b> |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 174        |
| Tabletop Spending by Income                                      | 174        |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 175        |
| Tabletop Spending by Generation                                  | 176        |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 176        |
| <b>Features that Influenced Most Recent Tabletop Purchase</b>    | <b>177</b> |
| Primary Reason Why Made Most Recent Tabletop Purchase            | 177        |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 178        |
| <b>Where Made Most Recent Tabletop Purchase</b>                  | <b>179</b> |
| <b>Details about Dinnerware Purchases</b>                        | <b>179</b> |
| Type of Dinnerware Products Bought                               | 179        |
| Style of Dinnerware Bought                                       | 179        |
| More about the Most Recent Dinnerware Purchase                   | 180        |
| → Strategies for Tabletop Marketers to Maximize Sales:           | 181        |
| <b>Details about Glassware, Crystal and/or Barware Purchases</b> | <b>182</b> |
| Type of Glassware Bought   | 182        |
| More About the Most Recent Glassware Purchase                    | 182        |
| <b>Details about Flatware Purchases</b>                          | <b>182</b> |
| Type of Flatware Products Bought                                 | 182        |
| More About the Most Recent Flatware Purchase                     | 183        |
| <b>Details about Servingware Purchases</b>                       | <b>183</b> |
| Type of Servingware Bought                                       | 183        |

# The Tabletop Report 2009

---

|   |            |
|---|------------|
| Material of Servingware .....   | 183        |
| More About the Most Recent Servingware Purchase .....   | 184        |
| <b>Details about Tabletop Decorative Accessories, Gifts or Collectibles Purchases .....</b>             | <b>184</b> |
| Type of Decorative Accessories Bought .....   | 184        |
| Material of Decorative Accessories .....  | 184        |
| More About the Most Recent Decorative Accessories Purchase .....  | 185        |
| <b>Details about Other Tabletop Accessories Purchases .....</b>   | <b>185</b> |
| Type of Other Tabletop Accessories Bought.....  | 185        |
| More About the Most Recent Other Tabletop Accessories Purchase.....                                     | 186        |
| <b>Summary of Motivations for Most Recent Purchase of Specific Tabletop Products.....</b>               | <b>186</b> |
| → Strategies for Tabletop Marketers to Maximize Sales:.....   | 187        |
| <b>About Shopping for Tabletop.....</b>   | <b>188</b> |
| Ways Tabletop Consumers Used the Internet in Support of Tabletop Purchases or Decorating Decisions..... | 188        |
| → Strategies for Tabletop Marketers to Maximize Sales:.....   | 188        |
| Features that Influence How Consumers Shop for Tabletop Items Online.....                               | 189        |
| <b>Types of Stores Where Tabletop Consumers Regularly Shop .....</b>                                    | <b>189</b> |
| → Strategies for Tabletop Marketers to Maximize Sales:.....   | 190        |
| Favorite Stores for Tabletop Shoppers .....   | 190        |
| Experiences Rated Important in Influencing Tabletop Consumers to Shop.....                              | 191        |
| Activities that Influence the Tabletop Shopper Most.....  | 191        |
| Role of Bridal or Gift Registry in Influencing the Tabletop Shopper .....                               | 192        |
| → Strategies for Tabletop Marketers to Maximize Sales:.....   | 192        |
| <b>Trends in Tabletop Shopping Including Influence of Current Recession .....</b>                       | <b>193</b> |
| Trends in Shopping for Tabletop Now compared with Year Ago.....   | 193        |
| Trends in Future Tabletop Shopping .....  | 194        |
| Changes Tabletop Consumers Are Making in Response to Current Economic Situation .....                   | 194        |
| → Strategies for Tabletop Marketers to Maximize Sales:.....   | 194        |
| <b>Tabletop Brands .....</b>  | <b>195</b> |
| Role of Bridal or Gift Registry in Tabletop Brands Purchased.....                                       | 195        |
| Role of Brand in New Purchase .....   | 196        |
| → Strategies for Tabletop Marketers to Maximize Sales:.....   | 196        |

# The Tabletop Report 2009

---

|  |     |
|--|-----|
| Attitudes about Tabletop .....   | 196 |
| Four Different Personalities of Tabletop Consumers Emerged.....                                  | 198 |
| → Strategies for Tabletop Marketers to Maximize Sales:.....                                      | 200 |
| → Strategies for Tabletop Marketers to Maximize Sales:.....                                      | 200 |
| APPENDIX A: FOCUS GROUP COMMENTS.....  | 202 |
| Focus Group Research .....   | 202 |
| Focus Group Respondents Discuss Their Tabletop Collections .....                                 | 203 |
| Tabletop Buyers Discuss Dinnerware Styles — What differentiates formal and casual tabletop?..... | 214 |
| About Building a Tabletop Legacy to Pass Down to Children .....                                  | 220 |
| Focus Group Respondents Discuss The Choices They Make in Selecting Tabletop Items .....          | 221 |
| Comments on Glassware .....  | 230 |
| Buyers Discuss Shopping for Tabletop .....   | 231 |
| Comments About Buying Tabletop off a Gift Registry .....   | 239 |
| Brides Discuss Tabletop and Bridal Registries.....   | 242 |
| Discussion of Tabletop Brand awareness.....  | 253 |
| Luxury Consumer's Purchase Motivation for Tabletop.....  | 254 |

## INTRODUCTION

### OBJECTIVES OF THE RESEARCH STUDY

***Marketers can discover new marketing strategies and opportunities through this study of the tabletop consumer market.***

This report summarizes the results of a major research initiative conducted for a select group of forward-thinking tabletop marketers. Under the guidance and direction of these companies, this research study explores the consumer market for tabletop products, including dinnerware, glassware and crystal, flatware, servingware, tabletop decorative accessories and other tabletop products, such as linens. The research study places a special focus on the needs, desires and passions of tabletop consumers, specifically those who bought tabletop products in the past year either for their personal use or to give as gifts. Tabletop product companies, as well as retailers that sell tabletop products, including internet and direct marketers, will benefit from the new insights presented in this report into the tabletop customers' purchase behavior and mindset.

Through this study of the results of a quantitative surveys conducted among 1,165 consumers who recently bought any tabletop products, this report helps marketers and retailers tap into the psychology of people who buy tabletop goods in order to understand their drives, motivations and passions in making their purchase and shopping decisions. The insights provided in this report will help marketers and retailers understand their consumers better. In this way, they can discover new marketing strategies and opportunities that will help them reach their target consumers more effectively and more productively.

This study brings a special emphasis not just on what tabletop products consumer buy, but also on why they buy and where they shop for these goods. These insights translate directly into actionable strategies and tactics that marketers can use to build their businesses. Understanding the mindset of the home furnishing consumer, their desires and needs, is critical for companies to forge a path to market growth in this time of economic challenges.

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

- **Tabletop Market Size and Growth:** What is the size of the tabletop market, including the six key product segments in the market – Dinnerware; Glassware & Crystal; Flatware; Servingware; Tabletop Decorative Accessories; and Other Tabletop Accessories? How are the market's sales segmented by type of product and channels of distribution? How rapidly is it growing? What are future growth trends in the tabletop market?
- **Demographics of the Tabletop Market:** What are the demographic characteristics that distinguish tabletop buyers? What are the key demographic differences found among and between buyers of the different products and service segments (e.g., gender, age, generation, HHI, size, composition, ethnicity/race, education, etc.)?
- **Buying and Shopping Behavior of Tabletop Consumers:** What are the primary characteristics of the consumers' buying behavior related to tabletop goods? Where do tabletop consumers shop for the different types of products and services? What kind of shopping experiences do consumers crave and what kind do they disdain? What motivates them to buy tabletop and how can marketers tap these motivators through branding and marketing communications initiatives? What factors influence their decision making in product purchase? How much do they spend buying each of the products and across the entire category? What is the role of brand in product and services selection and shopping choices? How do different demographic segments differ in their shopping and buying behavior?
- **Favorite Tabletop Brands, Stores & Designers:** A major thrust of the research is to understand the brand preferences of tabletop customers in both their product selections and retail shopping choices. What designers, product brands and retailers do they think of for their purchases? How do these competing brands rank in terms of consumer awareness and usage?
- **Psychographic Profile and Segmentation of the Tabletop Markets:** A psychographic profile of the tabletop consumer is presented in this study. The profiles identify different types or personalities of consumers of tabletop

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goods. These profiles identify each personality's drives and motivations in purchasing home products. By understanding the psychology of different types of shoppers, marketers will discover what factors are more or less important in driving each personality's purchasing decisions and how consumers' different attitudes and motivations influence what they buy and how much they spend. These insights will help tabletop marketers and retailers better understand the hearts and minds of their consumers.

## **CONSUMER SURVEY DELVES DEEPLY INTO PURCHASE BEHAVIOR AND MOTIVATION**

The tabletop survey was fielded November 20-25, 2008 by an online service bureau using their survey panel. Survey respondents were qualified by income (\$50,000 or more of household income) and age (24-64 years) and as well as whether they had purchased any tabletop product, either for oneself or as a gift, in the past 12 months. A total of 2,101 respondents were surveyed to identify those 1,165 consumers that met the survey qualifications and completed the survey. The average age in the tabletop survey sample was 44.2 years; household income was \$98,000 with 67 percent of the sample falling in the middle-income range of \$50,000-\$99,999 and 33 percent falling in the affluent income range over \$100,000. The gender split of the general survey sample was 66 percent female and 34 percent male.

***Results of the 2008 tabletop survey will be compared with previous tabletop survey conducted in 2006 to provide trend analysis***

This report will also compare the current survey findings with those from the last tabletop survey conducted by Unity Marketing in 2006. The 2006 survey included a quantitative survey among 1,303 recent tabletop buyers which is also reported. The 2006 survey sample had an average income of \$69,300, slightly higher than the national average at that time, and male/female ratio of 36 percent/64 percent

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*Where appropriate, comparisons of the recent tabletop survey with results of the recent home furnishings consumer survey will be presented to provide points of comparison for marketers that serve both target markets.*

During July 2008, Unity Marketing completed a survey among 1,360 recent home furnishings consumers. The same income and age criteria were used to qualify survey respondents. Home furnishings buyers were further qualified by being active in home decorating and/or remodeling projects in the past year. Because the tabletop market is a subset of the home furnishings market, this report will present findings from the home furnishings survey where appropriate in order to provide an interesting point of comparison between the two sample populations. This will help marketers and retailers understand the similarities as well as differences between the target consumers in each market.

## SPECIFIC PRODUCTS, BRANDS AND DATA POINTS PRESENTED IN THIS STUDY

The survey conducted among active tabletop buyers was divided into the following sections and which provides an outline for this report:

### Demographics

*The demographic data contained in this report helps marketers identify the key descriptive characteristics of their primary target market.*

Marketers can use the demographic data contained in this report to identify the key descriptive characteristics of their primary target market. The demographic composition of the tabletop market gathered in this survey describe the consumers' gender; age; income; marital status; home ownership; children and number of people living in the home; occupation; educational attainment; and ethnicity.

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## Tabletop Products They Have and Own and Trends in Usage

*In order to understand the opportunities for tabletop marketers to sell into their target market, basic information was gathered about their tabletop collections.*

In order to understand the opportunities for tabletop marketers to sell into their target market, basic information was gathered about the respondent's tabletop collections, including the number of matching sets of dinnerware by type (e.g. everyday dinnerware; casual lifestyle; and formal style); flatware by type (e.g. stainless steel; silver-plate; and sterling silver); and glassware (e.g. crystal stemware).

For those respondents who owned one or more formal dinnerware and/or flatware services, additional questions were asked about trends in use of their formal collections. Further, for formal dinnerware consumers, questions were asked about how much they spent on their dinnerware service, as well as how much they would expect to spend to add a new five-piece place setting to their collection.

## Whether Any Tabletop Items Are Collected

*Understanding the collecting interest of their customers helps tabletop marketers target the collectors within their target market*

Tabletop items, notably figurines, mugs, and teapots, are popular collectibles, so respondents were asked whether they collected any of these items. In addition, detail purchase data was collected among recent buyers of tabletop decorative accessories, such as frames, cups-and-saucers, figurines, vases, candlesticks, etc., which includes many items which are collected and viewed by consumers as 'collectibles.'

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## Definition of Luxury in their Lifestyle

***These insights provide powerful guidance for marketers and retailers targeting the more upscale market to position their products most effectively.***

In order to understand the dynamics of luxury in the mindset of the tabletop consumer, respondents were asked to define luxury in terms of their lifestyle in general as well as what luxury means in terms of their tabletop purchases. These insights provide powerful guidance for marketers and retailers targeting the more upscale segments of the market to position their products most effectively.

## Recent Tabletop Purchases

Respondents were qualified to take the survey because they had recently purchased one or more of the following tabletop products for their personal use and/or to give as a gift.

- Dinnerware (such as dinner plates, bowls, salad and bread plates, etc.)
- Glassware, Crystal, Barware (such as drinking glasses, stemware, barware, etc.)
- Flatware (such as forks, knives, spoons, etc.)
- Serving Pieces (such as serving bowls, trays, platters, etc.)
- Tabletop Decorative Accessories, Gifts or Collectibles (such as candlesticks, frames, teapots, figurines, vases, etc.)
- Other Tabletop Accessories (such as linens, tablecloths, place mats, etc.)

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## Tabletop Products Purchased, Amount Spent and Where Bought

*Information was gathered about what types of tabletop items were bought, how much was spent and in what type of store or shopping venue those purchases were made.*

Survey respondents were queried about six major categories of tabletop products. For each product category purchased, respondents were asked about whether their most recent purchase was made as a gift or for oneself; bought on sale or at a discount or paid full price; a luxury or premium brand or an ordinary, everyday brand; and whether the item was something desired or needed. These data points help marketers more effectively target the motivations that drive their consumers to buy.

Product categories in the survey include:

- **Dinnerware**, specifically:

### By Package

- Four or five piece place settings
- Boxed sets of four or more place settings
- Individual (open stock) plates, bowls, mugs
- Other dinnerware items

### By Style

- Everyday style (i.e. suited for everyday use)
- Casual lifestyle (i.e. better than everyday but more casual than formal)  
Formal style (i.e. fine china for special occasions)

- **Glassware, Crystal and/or Barware**, specifically:

- Glassware (such as drinking glasses, juice glasses, etc.)

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- Glass Stemware
- Glass Barware
- Crystal Stemware (such as wine glasses, water glasses, etc.)
- Crystal Barware
- Other Glassware Items
- **Flatware**, specifically:
  - Stainless Steel five-piece place settings (such as knife, fork, salad fork, spoon, soup spoon, etc.)
  - Stainless Steel boxed set of four or more place settings
  - Stainless Steel flatware serving utensils (such as ladles, serving forks, serving spoons, cake knife, etc.)
  - Sterling Silver five-piece place settings
  - Sterling Silver boxed set of four or more five piece place settings
  - Sterling Silver flatware serving utensil (such as ladles, serving forks, serving spoons, cake knife, etc.)
  - Other flatware pieces (such as cheese knives, aperitif forks, steak knives, etc.)
- **Servingware, Serving Pieces**, specifically:

## By Type

- Bowls
- Platters
- Chargers
- Serving Trays

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- Serving Flatware, such as spoons, salad services, cheese knives
- Napkin Rings
- Serving Boards
- Pitchers
- Decanters and/or Cruets
- Cake Stands
- Gravy & Butter
- Teapot and/or Coffee Service
- Salt & Pepper
- Salad Bowls, Service
- Sugar & Cream set
- Ice Buckets
- Chip & Dip sets
- Other Serving Pieces

## **By Material**

- Glassware
- Crystal
- Porcelain, Ceramic, Stoneware
- Fine China
- Stainless Steel

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- Pewter or Metal Alloy
- Silver-Plate or Sterling Silver
- **Tabletop Decorative Accessories, Gifts or Collectibles**, specifically:

## By Type

- Cups-and-saucers
- Mugs
- Figurines
- Picture Frames
- Vases
- Decorative Plates
- Candlesticks
- Salt-and-pepper
- Baby Gifts
- Decorative Boxes
- Votives

## By Material

- Glassware
- Crystal
- Porcelain, Ceramic, Stoneware

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- Fine China
- Stainless Steel
- Pewter or Metal Alloy
- Silver-Plate or Sterling Silver
- **Other Tabletop Accessories**, specifically:
  - Table Linens (such as placemats, napkins, table clothes, etc.)
  - Kitchen Linens (such as towels, etc.)
  - Decorative centerpieces

Within each major product category (e.g. Dinnerware, Glassware, Flatware, Servingware, Decorative Accessories, Other Tabletop Accessories) the amount of money spent in the past year was gathered, thus allowing detailed analysis of spending within category and total across all categories.

## Categories of Stores Included in Study

Further the respondents reported where they made their purchases of the products in the past year, thus allowing marketers and retailers to understand the channels of distribution for each major product category. The types of stores included in the survey were:

- Home specialty stores including furniture and home furnishings stores (*such as Pier 1, Bed, Bath & Beyond, Pottery Barn, Crate and Barrel, Kirklands, IKEA, Ethan Allen or local furniture stores, etc.*)
- Specialty Kitchen/Tabletop Store (*such as Williams-Sonoma, Sur la Table, etc.*)
- Traditional department stores (*such as JC Penneys, Sears, Dillards, Macys, etc.*)
- Luxury department store (*such as Neiman Marcus, Nordstrom, Bloomingdales, etc.*)

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- 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.*)
- Jewelry Stores (*such as Bailey, Banks & Biddle, Zales, Whitehall, Kay's, Ross Simons, etc.*)
- Specialty Gift Stores, including small independent gift shops or chain stores (*such as Hallmark, Carlton Cards, etc.*)
- Luxury Gift Store or Luxury Boutique (*such as Tiffany, Horchow, Ralph Lauren Polo, Swarovski, Lladro, etc.*)
- Home Shows, Party Demonstrations (*such as PartyLite, Longaberger, Pampered Chef, etc.*)
- Non-store retailers, including internet sites, mail order catalogs, direct home sales or TV shopping channels (*such as HSN, QVC or infomercials*)
- Grocery Stores (*such as Acme, Albertsons, Safeway, Trader Joes, Publix, Giant, etc.*)
- Outlet Store or Company Outlet Store (*such as Lenox Outlet, Waterford Wedgwood Outlet store, Mikasa Outlet, Pfaltzgraff Outlet, etc.*)

## What Influenced Tabletop Buyers in their Purchases

***By analyzing the factors that most influence the consumers to buy, marketers can gauge the relative effectiveness of their marketing efforts and allocate resources according to those factors that are most influential in getting the consumer to buy.***

Tabletop buyers shared the relative importance of various factors in influencing their most recent purchase, such as articles and reviews, advertising, brand name, Internet research, etc. By analyzing these factors, marketers can gauge the relative effectiveness of their marketing efforts and allocate resources according to those factors that are most influential in getting the consumer to buy.

They also reported the primary reasons why they made their most recent purchase, such as preparing for a party or special event, to add to a collection, to replace a broken or worn out item, etc.

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## Special Investigation: Bridal or Gift Registries as Influencing Consumers

*The results of this investigation will help tabletop marketers better understand the role of bridal and gift registries in moving their products.*

Because of the importance of the bridal market to tabletop marketers, this research study included a number of questions related to whether or not the most recent gift purchase was motivated by being listed on a gift or bridal registry. These data points will help quantify the role that bridal and gift registries play in marketing and selling tabletop goods.

## Special Investigation: Role of the Internet

*The results of these questions will help tabletop marketers and Internet websites position their products and services to attract the best clientele.*

Respondents were also asked about the role that the internet played in their project, either for research, tabletop setting advice and/or ordering products, etc. They also rated the features of Internet shopping that are most important to them when shopping for tabletop products. The results of this investigation will help tabletop marketers improve their websites and guide internet providers in positioning their products and services to active internet shoppers.

## More about Shopping for Tabletop

*The results of these questions support retailers in better positioning their store to capture the loyalty of the best tabletop shoppers.*

In addition to gathering detail data about where people made their most recent tabletop purchases, questions were asked pertaining to tabletop shopping in general. Respondents rated the importance of each type of store depending upon whether they turn to that store regularly as a shopping source, occasionally, rarely or never.

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Further, respondents were asked to rate store and service features that most powerfully motivate them to shop for tabletop items. Finally, they were asked to name specific stores where they typically shop for tabletop, identifying store brands from an aided list. The results of these questions support retailers in better positioning their store to capture the loyalty of the best tabletop shoppers.

## **Special Investigation: How the Current Economic Crisis is Impacting the Tabletop Shopper and the Trends on Future Spending on Tabletop**

*The results of these questions will help tabletop marketers understand the impact of the 2008 recession on the mindset of the tabletop consumers and how this economic situation will effect their spending in the coming year.*

Respondents were also asked specific changes they have made in their shopping and purchases in response to the current economic crisis. Further they were asked about their expected spending on tabletop items in the coming year in light of the new economic reality. This information is critical for marketers to assess their future financial status and to plan new marketing programs that may help them manage their business for the immediate future.

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## Attitudes about Tabletop Usage and Purchasing

*This study identified five different types of consumer personalities that make up the overall tabletop marketplace.*

*The analysis of these five personalities enables marketers to understand the mindset and psychology that distinguished the best from the worst target for their marketing promotions.*

The survey concluded with a series of 22 attitude questions that respondents were asked to rate in terms of how strongly they agreed or disagreed with each statement. The result of this battery of attitude questions is used to segment or cluster the consumers surveyed into different personality types distinguished by different motivations in tabletop usage and shopping behaviors. An analysis of the attitude statements helps marketers understand the mindset of different types of consumer personalities that make up the overall tabletop marketplace.

By understanding the different personalities that make up the tabletop market, marketers and retailers can more effectively tailor their marketing and advertising messages to each type of personality. It enables them to understand the mindset and psychology that distinguished the best from the worst target for their marketing promotions.

## TABLETOP BRANDS AND STORE BRANDS INCLUDED IN THE SURVEY

*Marketers and retailers will learn how their brands stack up in the competition for the tabletop customer.*

Tabletop respondents were presented with an extensive list of both retailer and tabletop brands to record purchases in the past year. In addition to reporting tabletop brands that the respondent purchased in the past year, they were also asked to identify specific brands that they would consider for a new purchase. In this way marketers can learn not just which brands they have purchased, but which ones would be in their consideration set for a new purchase.

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***Marketers can learn not just which brands they have purchased, but which ones would be in their consideration set for a new purchase.***

The tabletop brands included in the survey were:

## Tabletop Brands

- Anna Weatherly
- Baccarat
- Belleek
- Bernardaud
- Christofle
- Corelle
- Dansk
- Daum
- Fitz & Floyd
- Gorham
- Haviland
- Johnson Brothers
- Kate Spade
- Kirk Steiff
- Kosta Boda
- Lalique
- Lenox
- Lladro
- L'Objet
- Lunt
- Michael Wainwright
- Mikasa
- Noritake
- Oneida
- Pfaltzgraff
- Riedel
- Royal Doulton
- Royal Worcester
- Shannon
- Spode
- Steuben
- Studio Nova
- Swarovski
- Towle
- Villeroy & Boch
- Waterford
- Wedgwood

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## Retail Brands

In addition to tabletop brands, respondents were asked to identify those stores in which they made tabletop purchases in the past year. The store brands included in the survey follow. In addition to this list of retailers, respondents were able to include a listing of up to three different stores if they were not included in this listing.

## Traditional Department Stores and/or its Website

- Dillards
- JC Penney's
- Macy's
- Sears
- Belks
- Bonton
- Carsons
- Herbergers
- Boscovs

## Luxury Department Stores and/or its Website

- Barneys New York

- Bergdorf Goodman
- Bloomingdales
- Lord & Taylor
- Neiman Marcus
- Nordstroms
- Saks Fifth Ave

## Mass & Discount Brand Purchase and/or its Website

- Costco
- Kmart
- Kohls
- Marshall's
- Sam's Club
- Steinmart
- Target
- TJ Maxx
- Wal-Mart

## Home Furnishings or Kitchen Stores and/or its Website

- Bed Bath & Beyond
- Crate & Barrel

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- HomeGoods
- IKEA
- Kirkland's
- Pier One
- Pottery Barn
- Sur la Table
- Williams-Sonoma
- Linens & Things
- Other Home Furnishings or Kitchen Store

## Luxury Retailers and/or its Website

- Bacarrat
- Lladro
- Swarovski
- Tiffany's
- Horchow
- Gearys Beverly Hills
- Fortunoff

## Tabletop Brand Specialty or Outlet Stores and/or Its Website

- Barbara Barry
- Emeril
- Hermes
- Jasper Conran
- Lenox Store
- Martha Stewart
- Mikasa
- Noritake
- Oneida
- Pfaltzgraff
- Reed & Barton
- Rosenthal
- Royal Doulton
- Vera Wang
- Villeroy & Boch
- Waterford/Wedgwood Store

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## **Television/Mail Order/Internet**

- QVC
- HSN
- NBC Shop
- Blue Nile.com
- Amazon.com
- Replacements
- eBay