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Global
Public
Opinion

***PUBLIC VIEWS ON THE
CANADIAN DIAMOND INDUSTRY***

Final Report

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CANADIAN DIAMOND INDUSTRY***

Final Report

Submitted to:

Competition Bureau of Canada

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INTRODUCTION

The Competition Bureau of Canada asked Ipsos-Reid to conduct a study that would examine the views of Canadian adults regarding the Canadian diamond industry.

METHODOLOGY

All data were collected via the *Angus Reid Express* omnibus, a telephone survey carried out between March 5th and March 8th, 2001 among a representative cross-section of 1,001 Canadian adults. With this national sample, one can say with 95 percent certainty that the results are within ± 3.1 percentage points of what they would have been had the entire adult Canadian population been polled. The data are weighted to ensure an accurate reflection of the actual Canadian population according to the 1996 Census.

SUMMARY OF KEY FINDINGS

- Almost two in three Canadians claim to have purchased jewellery that includes a diamond.
- Among respondents who have never purchased jewellery that includes a diamond, one in three say they would consider such a purchase.
- Two in five respondents state that when they think of a product that is *Canadian*, they think it is a product that was made in Canada. Slightly fewer think the same thing when they hear that a product is *made in Canada*.
- A plurality of respondents believe that a *Canadian* diamond is a diamond that *comes from Canada*, followed by those who say it is a diamond that was *made in Canada*. Results are reversed among respondents who are asked to define a diamond *made in Canada*. A plurality say it is a diamond that *was made in Canada* followed by those who say it *comes from Canada*. Interestingly, slightly less than one in ten respondents (in both cases) don't know there is a diamond industry in Canada.
- When respondents are asked to choose from three possible descriptions of a *Canadian* diamond and a diamond *made in Canada*, a plurality (in both cases) believe they are diamonds that are *cut and polished in Canada*, followed by slightly fewer (in both cases) who say these diamonds are *mined, cut and polished in Canada*. Fewer respondents (in both cases) say the diamonds are *mined in Canada* only.
- Interestingly, when they see a symbol such as the Canadian flag or the maple leaf associated with a diamond, slightly more respondents believe the diamond *was mined, cut and polished in Canada* than those who believe it was *cut and polished in Canada* only.
- A majority of respondents define the appraisal value of jewellery as *the actual worth of the jewel*, while a minority say it is what *determines the market price*. However, when asked to choose from possible definitions, a plurality of respondents say the appraisal value of a jewel is the *price above the regular price*.

DETAILED FINDINGS

Past purchase of a diamond

Almost two in three (63%) Canadians claim to have purchased jewellery that includes a diamond.

Past Purchase of a Diamond

Have you ever purchased any jewellery that includes a diamond?



Base All Respondents: 1001

Canadians who are most likely to have purchased a diamond are:

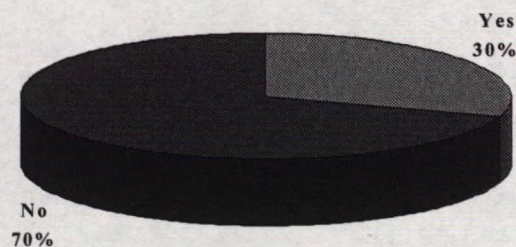
- older (peaking at 73% for those 55 years of age and older),
- those with a higher income (peaking at 75% for those earning \$60K and over),
- those with a post-secondary education (66%), and
- residents of Alberta (73%).

Considering the Purchase of a Diamond

Among respondents who have never purchased jewellery that includes a diamond, one in three (30%) say they would consider such a purchase.

Considering the Purchase of a Diamond

Have you ever considered purchasing any jewellery that includes a diamond?



Base Never purchased any jewellery that includes a diamond: 371

The following are most likely to say they would purchase a diamond:

- Canadians with a higher income (peaking at 39% for those earning \$60K and over),
- those with a university education (36%),
- younger respondents (peaking at 38% for those between 18 and 34 years of age), and
- residents of Saskatchewan/Manitoba¹.

¹ Please note that the base N=20 is too small to present a percentage for this demographic.

Meaning of *Canadian* and *Made in Canada* when Describing a Product

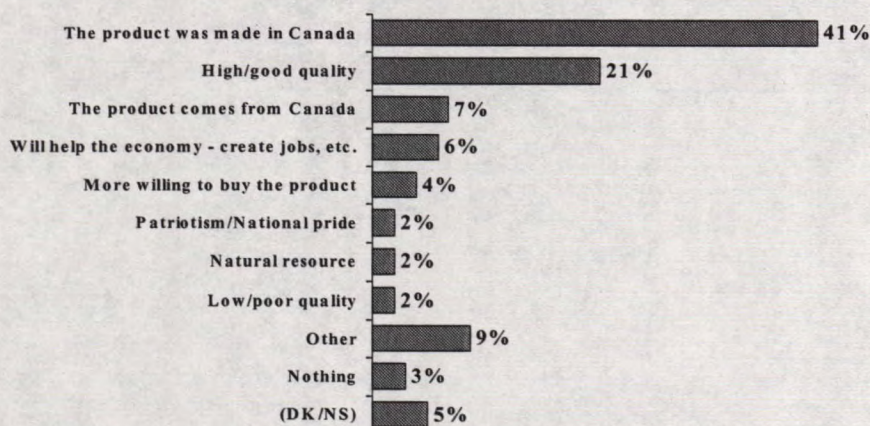
Half the respondents were asked what they thought the word *Canadian* meant when associated to a product. The other half were asked the same question about the term *made in Canada*. The findings below illustrate the responses offered for each expression.

Canadian

Two in five (41%) respondents state that when they think of a product that is *Canadian*, they think it is a product that was made in Canada. One in five (21%) say they think it means the product is of high or good quality. All other responses were offered by less than 10% of respondents.

Meaning of *Canadian* when Describing a Product

When you hear or see the term Canadian associated with any product, what does that mean to you?



Base "Canadian": 489

The following respondents are most likely to state that when they think of a product that is *Canadian*, they think it is a product that was made in Canada:

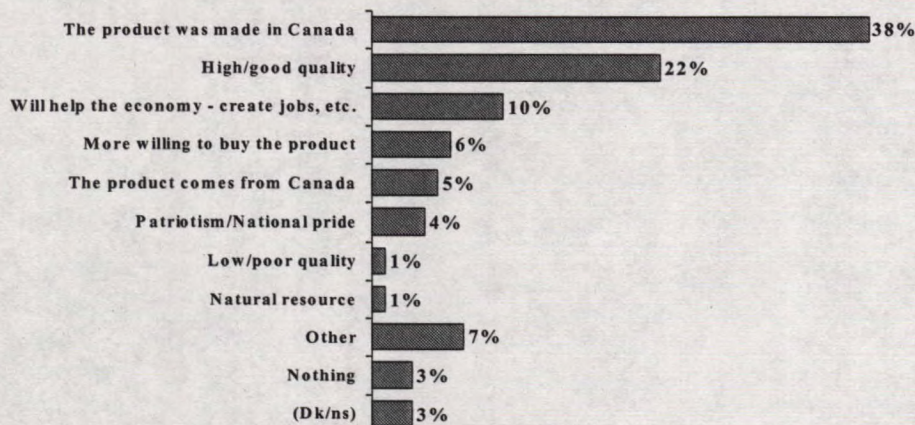
- respondents with a high school education (48%),
- those earning less than \$30K (44%),
- residents of Alberta (50%), and
- respondents 55 years of age and older (47%).

Made in Canada

Almost two in five (38%) respondents believe that a product *made in Canada* is a product that was made in Canada. One in five (22%) believe it means the product is of high or good quality. One in ten (10%) believe that a product *made in Canada* will help the economy (creates jobs, etc.). All other responses were offered by less than 10% of respondents.

Meaning of *Made in Canada* when Describing a Product

When you hear or see the term made in Canada associated with any product, what does that mean to you?



Base "Made in Canada": 512

The following respondents are most likely to state that when they think of a product that is *made in Canada*, they think it is a product that was made in Canada:

- those with a post-secondary education (42%),
- residents of Ontario (45%), and
- respondents 55 years of age and older (41%).

Meaning of *Canadian* and *Made in Canada* when Referring to a Diamond

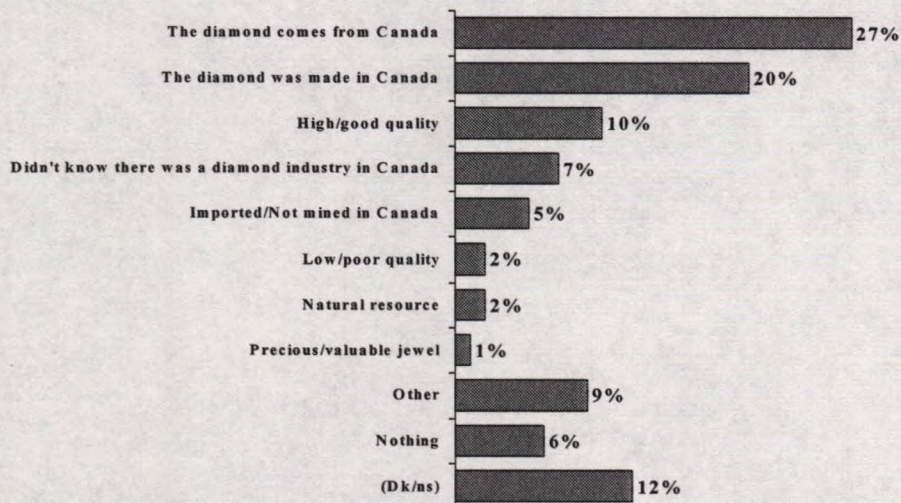
Half of the respondents were asked what they thought the word *Canadian* meant when associated to a diamond. The other half were asked the same question for the term *made in Canada*.

Canadian

More than one in four (27%) respondents believe that a *Canadian* diamond is a diamond that comes from Canada. One in five (20%) believe that it is a diamond that was made in Canada and one in ten (10%) believe it means that it is a diamond of high or good quality. Interestingly, 7% of respondents don't know there is a diamond industry in Canada and 12% don't know what a *Canadian* diamond means.

Meaning of *Canadian* when Describing a Diamond

When you hear or see the term Canadian associated with a diamond, what do you think that means?



Base "Canadian": 489

The following respondents are most likely to believe that a *Canadian* diamond is a diamond that comes from Canada:

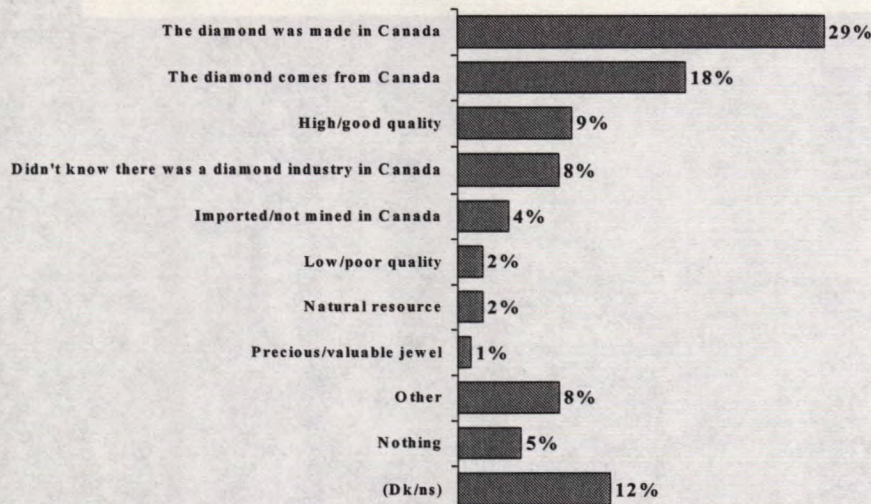
- residents of British Columbia (37%),
- older Canadians (peaking at 34% for those 55 years of age and older),
- those with a university education (35%), and
- those with a higher income (peaking at 34% for those earning \$60K and over).

Made in Canada

Almost three in ten (29%) respondents believe that a diamond *made in Canada* is a diamond that was made in Canada. Slightly less than one in five (18%) believe this is a diamond that comes from Canada, and less than one in ten (9%) believe it is a diamond of high or good quality. Interestingly, 8% of respondents don't know there is a diamond industry in Canada, and 12% of respondents don't know what is meant by *made in Canada* when describing a diamond.

Meaning of "Made in Canada" when Describing a Diamond

When you hear or see the term made in Canada associated with a diamond, what do you think that means?



Base "Made in Canada": 512

The following respondents are most likely to believe that a diamond *made in Canada* is a diamond that was made in Canada:

- residents of Alberta (36%),
- older respondents (peaking at 32% for those 55 years of age and older),
- those with less than a high school education (34%), and
- respondents earning a higher income (peaking at 33% for those earning \$60K and over).

77% believe eat & polish here
in Canada

Description of a *Canadian* Diamond/Diamond *Made in Canada*

Respondents were read a series of possible descriptions of diamonds. Half of the respondents were asked what they think is meant when a diamond is described as a *Canadian* diamond, while the other half was asked the same question for the term *made in Canada*.

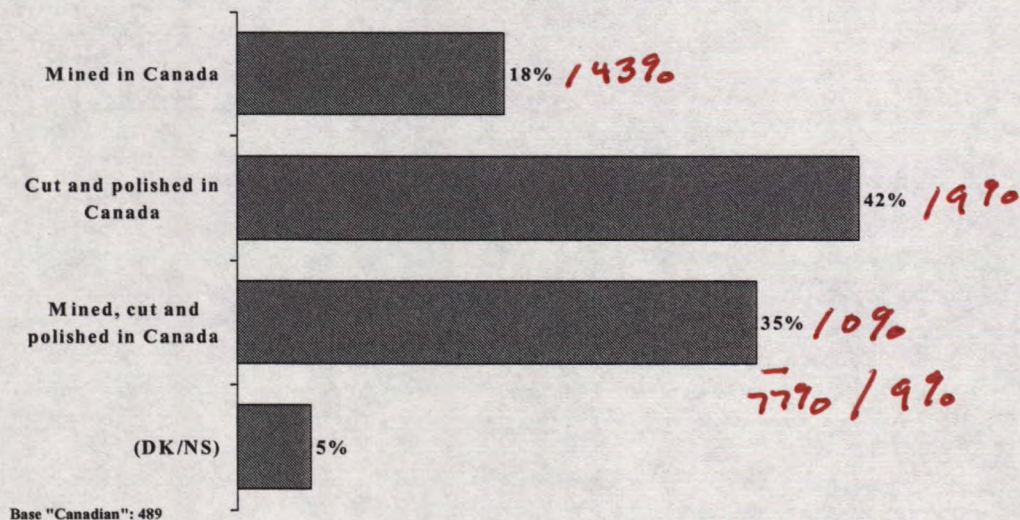
Canadian

Two in five (42%) respondents believe that a *Canadian* diamond is a diamond that was cut and polished in Canada, while one in three (35%) believe it is a diamond that was mined, cut and polished in Canada, and one in five (18%) believe it is a diamond that was mined in Canada.

Canadian Diamond

mined $\rightarrow 18 + 35 = 53\%$
C + P $\rightarrow 42 + 35 = 77\%$

If a diamond is described as Canadian do you think the diamond was:



The following respondents are most likely to believe that a *Canadian* diamond is a diamond that was cut and polished in Canada:

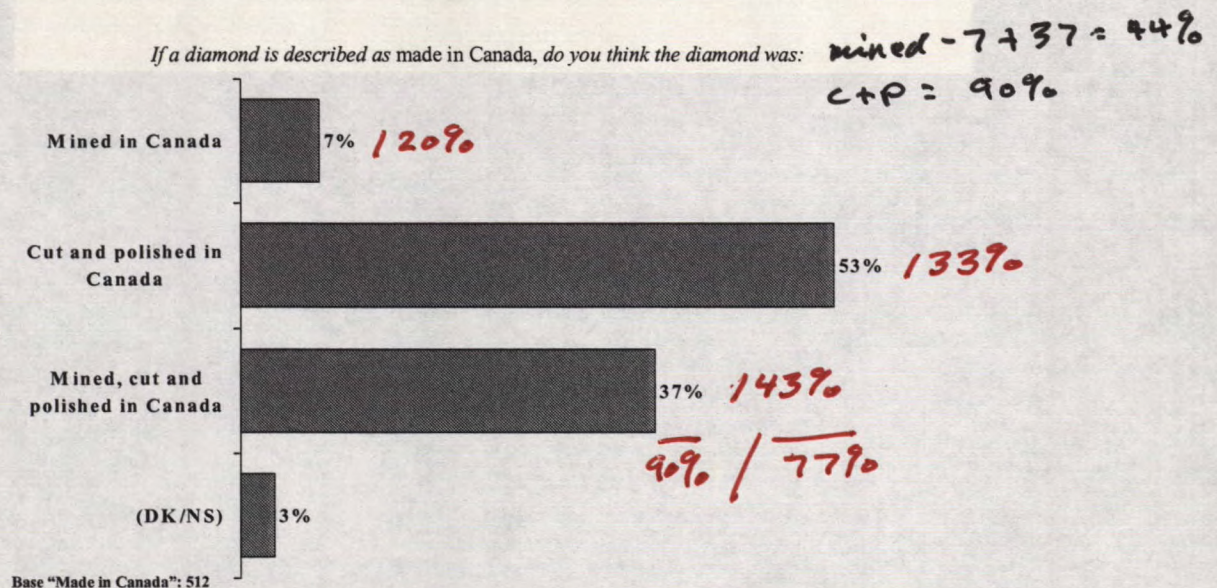
- respondents with higher educational attainment (peaking at 45% for those with a university education),
- those with a lower income (peaking at 51% for those earning less than \$30K),

- residents of Quebec (57%),
- younger Canadians (peaking at 46% for those between 18 and 34 years of age), and
- women (45%).

Made in Canada

Slightly more than half of the respondents believe that a diamond *made in Canada* is a diamond that was cut and polished in Canada, while almost two in five (37%) believe it is a diamond that was mined, cut and polished in Canada, and less than one in ten (7%) believe it was mined in Canada only.

Diamond Made in Canada



The following Canadians are most likely to believe that a diamond *made in Canada* is a diamond that was cut and polished in Canada:

- residents of Quebec (69%),
- those between 18 and 34 years of age (56%) and between 35 and 54 years of age (56%),
- those with a high school education (61%), and
- those earning less than \$30K (56%).

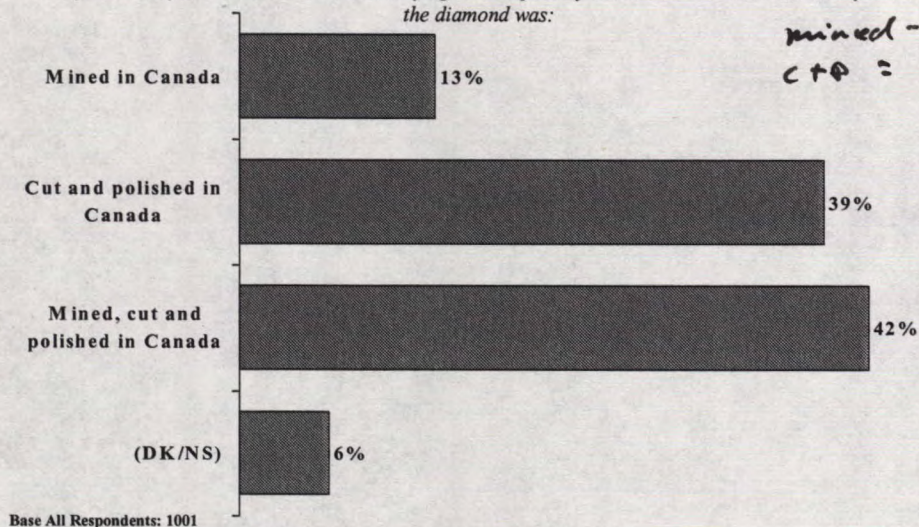
• 90% believe cut + polished in
Cannula

Canadian Flag/Maple Leaf Symbols and Diamonds

Respondents were read a series of possible meanings of symbols such as the Canadian flag or the maple leaf when associated with a diamond. Two in five (42%) respondents say these symbols mean that the diamond was mined, cut, *and* polished in Canada. Slightly less than two in five (39%) believe these symbols mean the diamond was cut and polished in Canada, while one in ten (13%) believe the diamond was mined in Canada.

Canadian Flag/Maple Leaf Symbols and Diamonds

When you see a symbol such as the Canadian flag or a maple leaf associated with a diamond, do you think the diamond was:



Respondents who are most likely to say these symbols mean that the diamond was *mined, cut, and polished* in Canada are:

- residents of Alberta (48%), and
- those earning a higher income (peaking at 47% for those earning \$60K and over).

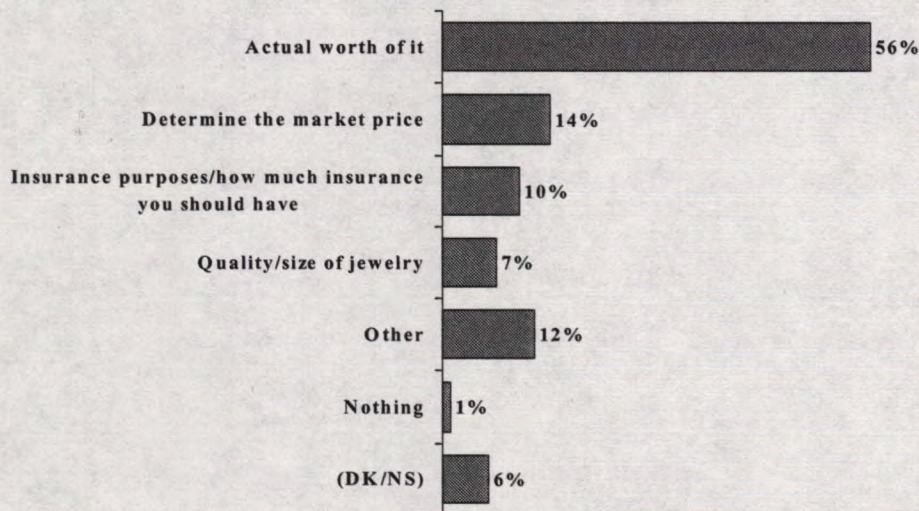
Meaning of *Appraised Value* Associated with a Diamond

Respondents were asked what they thought was meant when the term *appraisal value* was associated to jewellery.

More than half the respondents (56%) believe that the *appraisal value* of jewellery is the actual worth of it, while less than one in five respondents (14%) believe it is what determines the market price. One in ten (10%) respondents say that the term *appraisal value* is used for insurance purposes or how much insurance you should have. Slightly fewer (7%) believe this expression refers to the quality or size of jewellery.

Meaning of "Appraised Value" Associated with a Diamond

When you see the words 'appraised value' associated with jewellery what do you think that means?



The following respondents are most likely to believe that the *appraisal value* of jewellery is *the actual worth of it*:

- women (61%),
- those with a high school education (60%),
- residents of the Atlantic Provinces (68%), and
- respondents between 18 and 34 years of age (60%).

Respondents who are most likely to say that *appraisal value* of jewellery is what determines the market price are:

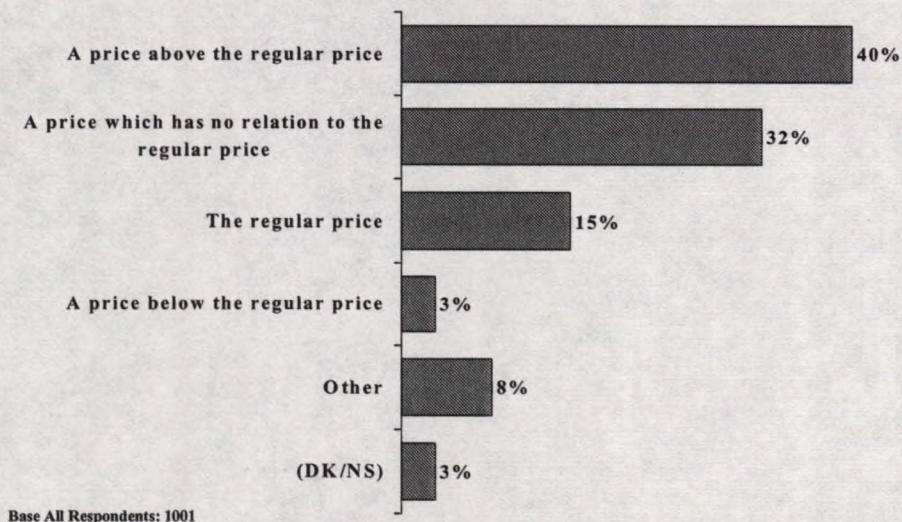
- those with higher educational attainment (peaking at 18% for those with a university education),
- those with higher annual incomes (peaking at 19% for those earning \$60K and over), and
- residents of British Columbia (19%).

Definition of *Appraisal Value*

Respondents were read a situation where they were considering purchasing a diamond for \$2,000 and the jeweller told them the appraisal value was \$3,500. They were asked what they thought the appraisal value of \$3,500 meant. Two in five (40%) respondents think the *appraisal value* in this case is a price above the regular price. One in three (32%) respondents say it is a price that has no relation to the regular price, while less than one in five (15%) believe it is the regular price. All other responses were mentioned by less than 10% of respondents.

Definition of *Appraisal Value*

*You are considering purchasing a ring priced at \$2,000. The jeweler tells you the appraisal value is \$3,500.
Do you think the appraisal value of \$3,500 is:*



The following respondents believe that the *appraisal value* in this case is a *price above the regular price*:

- respondents between 18 and 34 years of age (43%)
- those with a university education (43%), and
- those earning a lower income (peaking at 45% for those earning less than \$30K).

APPENDIX I – TOPLINE QUESTIONNAIRE

1. Have you ever purchased any jewellery that includes a diamond?

Base: All respondents	Total
Unweighted Base	1001
Weighted Base	1001
Yes	63%
No	37%
(DK/NS)	0

2. Have you ever considered purchasing any jewellery that includes a diamond?

Base: Never purchased any jewellery that includes a diamond	Total
Unweighted Base	371
Weighted Base	371
Yes	30%
No	70%
(DK/NS)	0

3_1. When you hear or see the term Canadian associated with any product, what does that mean to you?

Base: Canadian	Total
Unweighted Base	487
Weighted Base	489
the product was made in Canada	41%
high/good quality	21%
the product comes from Canada	7%
Will help the economy - create jobs etc.	6%
More willing to buy the product	4%
Patriotism/National pride	2%
natural resource	2%
low/poor quality	2%
Other	9%
Nothing	3%
(DK/NS)	5%

3_2. When you hear or see the term *Made in Canada* associated with any product, what does that mean to you?

Base: Made in Canada	Total
Unweighted base	514
Weighted base	512
The product was made in Canada	38%
High/good quality	22%
Will help the economy - create jobs etc.	10%
More willing to buy the product	6%
The product comes from Canada	5%
Patriotism/National pride	4%
Low/poor quality	1%
Natural resource	1%
Other	7%
Nothing	3%
(Dk/ns)	3%

4_1. When you hear or see the term *Canadian* associated with a diamond, what do you think that means?

Base: Canadian	Total
Unweighted Base	487
Weighted Base	489
The diamond comes from Canada	27%
The diamond was made in Canada	20%
High/good quality	10%
Didn't know there was a diamond industry in Canada	7%
Imported/not mined in Canada	5%
Low/poor quality	2%
Natural resource	2%
Precious/valuable jewel	1%
Other	9%
Nothing	6%
(Dk/ns)	12%

4_2. When you hear or see the term *Made in Canada* associated with a diamond, what do you think that means?

Base: Made in Canada	Total
Unweighted base	514
Weighted base	512
The diamond was made in Canada	29%
The diamond comes from Canada	18%
High/good quality	9%
Didn't know there was a diamond industry in Canada	8%
Imported/not mined in Canada	4%
Low/poor quality	2%
Natural resource	2%
Precious/valuable jewel	1%
Other	8%
Nothing	5%
(Dk/ns)	12%

5_1. If a diamond is described as *Canadian* do you think the diamond was:

Base: Canadian	Total
Unweighted Base	487
Weighted Base	489
Mined in Canada	18%
Cut and polished in Canada	42%
Mined, cut and polished in Canada	35%
(DK/NS)	5%

5_2. If a diamond is described as *Made in Canada* do you think the diamond was:

Base: Made in Canada	Total
Unweighted Base	514
Weighted Base	512
Mined in Canada	7%
Cut and polished in Canada	53%
Mined, cut and polished in Canada	37%
(DK/NS)	3%

6. When you see a symbol such as the Canadian flag or a maple leaf associated with a diamond, do you think the diamond was:

Base: All respondents	Total
Unweighted Base	1001
Weighted Base	1001
Mined in Canada	13%
Cut and polished in Canada	39%
Mined, cut and polished in Canada	42%
(DK/NS)	6%

7. When you see the words 'appraised value' associated with jewellery what do you think that means?

Base: All respondents	Total
Unweighted Base	1001
Weighted Base	1001
Actual worth of it	56%
Determine the market price	14%
Insurance purposes/how much insurance you should have	10%
Quality/size of jewelry	7%
Other	12%
Nothing	1%
(DK/NS)	6%

8. You are considering purchasing a ring priced at \$2,000. The jeweller tells you the appraisal value is \$3,500. Do you think the appraisal value of \$3,500 is:

Base: All respondents	Total
Unweighted Base	1001
Weighted Base	1001
A price above the regular price	40%
A price which has no relation to the regular price, or	32%
The regular price	15%
A price below the regular price	3%
Other	8%
(DK/NS)	3%

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w w w . i p s o s - r e i d . c o m

North America

Europe

Latin America

Asia

Middle East