Diversity in the Fine Jewelry Industry 2020

BACKGROUND

Jewelers of America and National Jeweler conducted a survey of individuals employed in the U.S. Fine Jewelry Industry in order to identify the landscape of diversity within the industry, as well as learn about inclusion policies and experiences related to racial discrimination.

The survey was open from September 23 to October 14, 2020 to all individuals working in the jewelry industry for companies based in the United States -- and the responses were completely anonymous.

Jewelers of America and National Jeweler distributed the link to the online survey via email to its respective industry contacts. In addition, the survey link was shared on social media channels and other jewelry industry associations were asked to share the survey link using their respective communication channels.

A total of 814 qualified individuals responded to the survey. The survey questions were segmented into three groups: employers (473), employees (200) and self-employed individuals (141).

ALL RESPONDENTS

What best describes the type of company that you work for?

<table>
<thead>
<tr>
<th>Company Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retailer</td>
<td>56.1%</td>
</tr>
<tr>
<td>Jewelry Designer</td>
<td>11.8%</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>9.5%</td>
</tr>
<tr>
<td>Wholesaler</td>
<td>7.8%</td>
</tr>
<tr>
<td>Trade/Education Association</td>
<td>3.5%</td>
</tr>
<tr>
<td>Business Services</td>
<td>2.9%</td>
</tr>
<tr>
<td>Appraiser</td>
<td>2.2%</td>
</tr>
<tr>
<td>Grading Laboratory</td>
<td>2.1%</td>
</tr>
<tr>
<td>Marketing/Advertising/PR/Media</td>
<td>1.6%</td>
</tr>
<tr>
<td>Gem Dealer</td>
<td>0.8%</td>
</tr>
<tr>
<td>Mining</td>
<td>0.1%</td>
</tr>
<tr>
<td>Other</td>
<td>1.7%</td>
</tr>
</tbody>
</table>

How many employees work at your company?

<table>
<thead>
<tr>
<th>Employee Size</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1, just me</td>
<td>17.2%</td>
</tr>
<tr>
<td>2 - 25</td>
<td>63.7%</td>
</tr>
<tr>
<td>26 - 50</td>
<td>5.7%</td>
</tr>
<tr>
<td>51 - 100</td>
<td>3.9%</td>
</tr>
<tr>
<td>101 - 500</td>
<td>4.1%</td>
</tr>
<tr>
<td>501 - 1,000</td>
<td>1.0%</td>
</tr>
<tr>
<td>1,001 - 2,500</td>
<td>1.3%</td>
</tr>
<tr>
<td>More than 2,500</td>
<td>3.1%</td>
</tr>
</tbody>
</table>

What best describes your job role?

<table>
<thead>
<tr>
<th>Job Role</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>59%</td>
</tr>
<tr>
<td>Executive/C-Suite</td>
<td>11%</td>
</tr>
<tr>
<td>Manager (with direct reports)</td>
<td>19%</td>
</tr>
<tr>
<td>Employee (no direct reports)</td>
<td>11%</td>
</tr>
</tbody>
</table>

Which of the following best describes you?

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>71.5%</td>
</tr>
<tr>
<td>Black or African-American</td>
<td>5.3%</td>
</tr>
<tr>
<td>Asian</td>
<td>4.9%</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>4.6%</td>
</tr>
<tr>
<td>Multiracial or Biracial</td>
<td>2.9%</td>
</tr>
<tr>
<td>American Indian or Alaska Native</td>
<td>0.7%</td>
</tr>
<tr>
<td>Native Hawaiian or Pacific Islander</td>
<td>0.0%</td>
</tr>
<tr>
<td>Other</td>
<td>2.7%</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>7.3%</td>
</tr>
</tbody>
</table>
Diversity in the Fine Jewelry Industry 2020

EMPLOYERS

Which of the following best describes you?

- White: 77.2%
- Asian: 4.1%
- Hispanic or Latino: 3.3%
- Black or African-American: 2.8%
- Multiracial or Biracial: 1.8%
- American Indian or Alaska Native: 0.5%
- Native Hawaiian or Pacific Islander: 0.0%
- Other: 3.3%
- Prefer not to say: 6.9%

Gender Identity

- Male: 35.0%
- Female: 32.6%
- 41.5%
- 43.3%
- 47.4%

Religion

- 60.7%
- Male
- Female

Race

- White: 77.2%
- Black or African-American: 29.2%
- Hispanic or Latino: 5.1%
- American Indian or Alaska Native: 24.3%
- Native Hawaiian or Pacific Islander: 13.1%
- Multiracial or Biracial: 31.2%
- Other: 6.4%
- Prefer not to say: 15.7%

What is your age?

- Under 18: 0.4%
- 18-24: 0.4%
- 25-34: 5.1%
- 35-44: 7.8%
- 45-54: 19.8%
- 55-64: 20.2%
- 65+: 37.4%

What gender do you most identify with?

- Male: 60.7%
- Female: 35.0%
- 4.3%

Does your company have a written policy in place to prevent discrimination of the following?

- Race: 49.0%
- Gender: 47.4%
- Religion: 43.3%
- Sexual Orientation: 41.5%
- Gender Identity: 32.6%
- None of the above: 51.8%

When thinking about racial justice and equity, how would you rate your company in the following areas?

<table>
<thead>
<tr>
<th>Area</th>
<th>Overall</th>
<th>Employee hiring practices</th>
<th>Vendor hiring practices</th>
<th>Racially diverse staff</th>
<th>Employee training</th>
<th>Receiving feedback from employees</th>
<th>Addressing employees about the topic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>6.4%</td>
<td>8.0%</td>
<td>9.7%</td>
<td>5.1%</td>
<td>13.1%</td>
<td>6.9%</td>
<td>10.5%</td>
</tr>
<tr>
<td></td>
<td>15.1%</td>
<td>12.8%</td>
<td>12.8%</td>
<td>8.5%</td>
<td>25.1%</td>
<td>25.1%</td>
<td>23.9%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>13.1%</td>
<td>28.7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>70.5%</td>
<td>68.5%</td>
<td>60.8%</td>
<td>41.3%</td>
<td>43.6%</td>
<td>55.4%</td>
<td>48.7%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>4.7%</td>
<td>9.7%</td>
<td>15.4%</td>
<td>16.7%</td>
<td>10.5%</td>
<td>9.7%</td>
<td>13.6%</td>
</tr>
</tbody>
</table>

N/A: Not Applicable

Very Good

Good

Fair

Poor

Very Poor
EMPLOYERS

How likely is it the recent calls for racial justice and equity influence the following areas of your company?

- Employee hiring practices
- Vendor hiring practices
- Discrimination policy
- Employee training
- Receiving feedback from employees
- Discussing employees about the topic

How interested are you in implementing changes in your company to help the Black community?

Do you think your company has the right resources in place to support the Black community?

Has your company publicly taken a position on the recent calls for racial justice and equity (e.g. openly support Black Lives Matter)?

Have you witnessed or been made aware of any race-based discriminatory actions at your company?
Diversity in the Fine Jewelry Industry 2020

EMPLOYERS

How would rate the jewelry industry’s support of individuals in each of the following categories?

Compared to other industries, how would you rate the jewelry industry in supporting Black employees?

How familiar are you with the movement Black Lives Matter?
Which of the following best describes you?

- White: 65.8%
- Black or African-American: 8.2%
- Hispanic or Latino: 8.2%
- Asian: 4.9%
- Multiracial or Biracial: 4.3%
- American Indian or Alaska Native: 1.1%
- Native Hawaiian or Pacific Islander: 0.0%
- Other: 1.6%
- Prefer not to say: 6.0%

What gender do you most identify with?

- Female: 74.2%
- Male: 23.7%
- Other: 2.2%

What is your age?

- Under 18: 0.0%
- 18-24: 1.1%
- 25-34: 9.7%
- 35-44: 15.1%
- 45-54: 35.5%
- 55-64: 24.7%
- 65+: 14.0%

Are you aware of your company having a written policy in place to prevent discrimination of the following?

- Race: 59.2%
- Gender: 58.7%
- Religion: 44.0%
- Sexual Orientation: 53.8%
- Gender Identity: 56.0%
- I am not aware: 41.8%

How familiar are you with what the policy says in regards to Black employees?

- Very Familiar: 24.7%
- Familiar: 21.5%
- Slightly familiar: 24.7%
- Not at all familiar: 29.0%
When thinking about racial justice and equity, how would you rate your company in the following areas?

Given recent calls for racial justice and equity (e.g., Black Lives Matter), how satisfied are you with your company’s actions?

Given recent calls for racial justice and equity, how has your current employer addressed the issue? (Select all that apply)

Do you think your company has the right resources in place to support Black employees?
Are you aware of race-based discrimination that occurred at any of the following? (Select all that apply)

- Current company
- Past employer
- Other companies in the jewelry industry
- None of the above

Thinking about companies you have worked for, have you ever brought up racial discrimination issues to human resources or management?

- Yes: 36.4%
- No: 42.4%
- Decline to answer: 21.2%

How satisfied were you with how the company resolved the racial discrimination issue?

- Very Satisfied: 41.7%
- Satisfied: 41.7%
- Dissatisfied: 16.7%
- Very Dissatisfied: 0%

Being a Black employee does not impede career advancement in the jewelry industry.

- Strongly Agree: 12.8%
- Agree: 28.7%
- Disagree: 40.4%
- Strongly Disagree: 18.1%

The jewelry industry does enough to make sure that Black employees feel accepted.

- Very Satisfied: 16.7%
- Satisfied: 41.7%
- Dissatisfied: 41.7%
- Very Dissatisfied: 0%

Thinking about companies you have worked for, have you ever brought up racial discrimination issues to human resources or management?

- Yes: 36.4%
- No: 42.4%
- Decline to answer: 21.2%

How satisfied were you with how the company resolved the racial discrimination issue?

- Very Satisfied: 41.7%
- Satisfied: 41.7%
- Dissatisfied: 16.7%
- Very Dissatisfied: 0%
Diversity in the Fine Jewelry Industry 2020

EMPLOYEES

How much do you agree or disagree with the following statement?

- The jewelry industry does enough to make sure that Black employees feel accepted.
  - Strongly Agree: 18.1%
  - Agree: 40.4%
  - Disagree: 28.7%
  - Strongly Disagree: 12.8%

- Being a Black employee does not impede career advancement in the jewelry industry.
  - Strongly Agree: 18.9%
  - Agree: 29.5%
  - Disagree: 32.6%
  - Strongly Disagree: 18.9%

Compared to other industries, how would you rate the jewelry industry in supporting Black employees?

- Much Better: 9.5%
- Better: 24.2%
- The same: 43.2%
- Worse: 14.7%
- Much worse: 8.4%

How familiar are you with the movement Black Lives Matter?

- Very familiar: 20.2%
- Familiar: 45.7%
- Somewhat familiar: 31.9%
Which of the following best describes you?

- White: 63.6%
- Black or African-American: 8.6%
- Asian: 7.1%
- Multiracial or Biracial: 4.3%
- Hispanic or Latino: 3.6%
- American Indian or Alaska Native: 0.7%
- Native Hawaiian or Pacific Islander: 0.0%
- Other: 2.1%
- Prefer not to say: 10.0%

What is your age?

- Under 18: 0.0%
- 18-24: 0.0%
- 25-34: 10.3%
- 35-44: 21.8%
- 45-54: 16.7%
- 55-64: 24.4%
- 65+: 26.9%

What gender do you most identify with?

- Female: 65.4%
- Male: 32.1%
- Other: 2.6%

When thinking about racial justice and equity, how would you rate your company in the following areas?

- Very interested: 12.5%
- Interested: 3.9%
- Slightly interested: 11.7%
- Not very interested: 30.5%
- Not at all interested: 41.4%
Has your company publicly taken a position on the recent calls for racial justice and equity (e.g. openly support Black Lives Matter)?

- Yes: 45.7%
- No, but planning to in the future: 3.7%
- No, not planning to take a position in the future: 33.3%
- Unsure what the company will do: 17.3%

Do you think your company has the right resources in place to support the Black community?

- Yes: 58.3%
- No: 41.7%

When thinking about racial justice and equity, how would you rate your company in the following areas?

- Black jewelry designers:
  - Excellent: 24.7%
  - Good: 18.5%
  - Fair: 13.6%
  - Poor: 13.6%
  - Very poor: 6.2%
  - N/A: 23.5%

- Black consumers:
  - Excellent: 19.8%
  - Good: 19.8%
  - Fair: 13.6%
  - Poor: 12.3%
  - Very poor: 11.1%
  - N/A: 23.5%

- Jewelry company employees:
  - Excellent: 21.7%
  - Good: 13.6%
  - Fair: 16.0%
  - Poor: 7.4%
  - Very poor: 8.6%
  - N/A: 33.3%
When thinking about racial justice and equity, how would you rate your company in the following areas?

- Much Better
- Better
- The same
- Worse
- Much worse

When thinking about racial justice and equity, how would you rate your company in the following areas?

- Very familiar
- Familiar
- Somewhat familiar
- Not very familiar
- Not at all familiar

Visit nationaljeweler.com for a complete analysis of the results of the 2020 Diversity in the Fine Jewelry Industry Survey.