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Retail Branding and Positioning

- How to build a Retail Brand Position in the Danish Optician Retail Sector

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Summary

The objective of this thesis is to analyze the following problem statement:

How can an optician brand, exemplified by Thiele, create an attractive position in a market that is assumed to be highly competitive with similar offerings?

Based on the assumptions of category blurring and the difficulties of distinguishing between the optician brands offerings, we want to analyze how Thiele can differentiate its store image given the market situation and create an attractive position.

After having created an understanding of the current competitive situation in the optician sector and conducted an empiric analysis of consumers' perception and associations of the optician brands, we analyzed which retail brand positions are obtainable and sustainable in the optician market. The results of our analysis made it possible to examine how Thiele can create an attractive position.

We recommend Thiele to take 'ownership' of a high-end fashion position and by choosing a differentiated positioning strategy linked to a strong brand personality, Thiele will be able to differentiate its store image. In terms of positioning strategy, Thiele needs to differentiate its strategy and not use the store image attributes for positioning strategy but instead utilize a user-oriented positioning strategy. This strategy is used when consumers are driven by social approval in their brand selection and their needs and feelings have to be aroused. Thiele's brand personality has to be aligned with the user-oriented positioning strategy and we recommend it to be linked to the personality of 'Sophistication'.

Finally, we recommend Thiele to take some parameter adjustments and implementations into consideration, which supports the high-end fashion position. Thiele should aim at having a broad and deep selection of popular designer brands and be updated with the newest collection in every store. Further more, design and atmosphere of the stores should be aligned with the personality of sophistication. The staff and service are also very influential part of the store experience and therefore Thiele should focus more on staff behavior and service skills. Moreover, Thiele should consider taking advantage of customers' data and use the information to appear more customized by developing further on an existing CRM-system. Finally, Thiele needs to align its positioning strategy and brand personality to its communication strategy in order to create a clear and consistent store brand image.

Preface

This thesis is from beginning to end in the entire process completed in collaboration, wherefore both thesis writers have taken part in all the writing and claim responsibility for every paragraph in the thesis and the resulting conclusion.

We will like to thank and show appreciation to all the people, who have participated in our focus group interviews and everybody else, who have helped making the completion of our thesis possible.

Nini Andersen Christine Dissing

1. Introduction

Retail brands have gained in popularity in the past decades. Today, brands exist by the grace of the relevance they bring to consumers. A relevance that is based on the unique underlying values of the brand - what the brand is, what the brand does and how the brand delivers here and now. If people can identify with those unique emotional and rational values, the brand will be successful.

Lately, retail brands have started to ‘copy’ the theory of product branding and adopt the elements that can add uniqueness and differentiation to a brand. However, retail brands are sufficiently different from product brands as retail brands typically are more multi-sensory in nature than product brands, and in addition they can rely on rich consumer experiences to impact their equity. Retailers can affect the brand image in different ways, e.g., by attaching unique associations to the quality of service, product assortment and merchandising, pricing and credit policy, etc. To manage a retail brand and to make it become successful, it requires the retail brand to be more real than a product brand. In a store, the entire retail organization is revealed and the true nature of a company can be experienced. This can be explained by the fact that people in store environments actively come in direct contact with the retail brand and experience it firsthand.

Over the last years, there has been a great deal of talk about the power of retail branding. Articles in the business press and experts within the field have been warning the retail industry about the danger of sameness and the risk of category blurring that can happen without the differentiation, which a distinctive brand strategy can provide. Retail stores across categories continue to sell similar merchandise and imitate one’s another promotions to the point where the ‘sea of sameness’ has become to be today’s retail cliché.

The Danish optician retail sector is no exception. In general, we find the optician retail sector to be a good example of the power of retail branding. We assume that most of the optician retail brands are perceived quit similar and from the consumers’ point-of-view, it becomes difficult to see the differences between the optician retailers and how they differentiate from one another. We assume this is due to the similar service skills, selection of product brands and merchandise, and not least the difficulty to see through the price level from one optician retail brand to another, as the optician sector seems to be categorized by blurred price differentiations.

1.1 Problem Area

The Danish optician retail sector is characterized by high competition from five big national players[1], and based on the communication from the optician retail brands, price appears to be the most important factor when attracting consumers' attention. In a sector characterized by category blurring and the difficulties of distinguishing between the optician retail brands' offerings of e.g. service and merchandise, price can easily become the critical factor when consumers decide which brand store they want to visit.

With this is mind, two questions arise; is it possible for a Danish optician retail brand to take a position that is not only about low prices and if yes, how can that Danish optician retail brand differentiate itself from the competitors and create an attractive position in which consumers can identify them with? These two questions will be the approach for our thesis, as we want to focus on the Danish optician retail market and its competitive situation. This thesis will focus on how an optician retail brand, exemplified by Thiele, can create a clear distinctive brand image and an attractive position.

We do think of Thiele as an exciting brand to analyze, as it can be argued to be one of the retail brands that is facing a challenge of gaining the consumers' attention. In terms of brand awareness, Thiele is ranked on a 4th place out of five with 78 % compared to 93 % to number 1, Louis Nielsen[2]. Furthermore, in correlation to turnover per store, Thiele is the one brand with the lowest sales with only 5.4 million on average compared to Louis Nielsen with the highest sales of 10.7 million on average[3].

[1] Louis Nielsen, Nyt Syn, Profil Optik, Synoptik and Thiele
[2] Appendix 1: Awareness of and using the different Optician Retailers
[3] Retail Institute Scandinavia (2010): "Kæder i Dansk detailhandel 2010" Table 88

2. Problem Statement

In this thesis, we are working from the following problem statement:

How can an optician retail brand, exemplified by Thiele, create an attractive position in a market that is assumed to be highly competitive with similar offerings?

2.1 Research Questions

In order to be able to answer the problem statement, we have composed 4 research questions with the purpose of controlling our working process.

We want to analyze:

- What is the current competitive situation in the optician market and what characterize the different retail brands?
- What are the most important store image attributes in building a retailer's brand image in the optician market?
- Which differentiated retail brand positions are obtainable and sustainable in the optician market?
- How can Thiele create a differentiated store image given the market situation?

By letting our work be framed by the above-listed questions, we will get through the theoretical and empirical data that will lead to an answer of our problem statement.

3. Clarification of Concepts

Here we want to clarify four important concepts that will be used throughout the thesis. We clarify these concepts based on how we consider and want to utilize the concepts in the thesis.

Optician retail brand

In the thesis, we use the term 'optician retail brand' in relation to the overall optician brand level, which means we operate at the store chain level. In our literature review this is similar to how we interpret the level of store image.

Attractive

As we want to analyze how an optician retail brand can achieve an attractive position, we find it important to clarify what we mean by attractive. For a position to be attractive, it needs to fulfill the following four conditions: 1) First, it should be relevant for consumers and match the customers' needs and expectations in regard to the optician sector. 2) Next, it must be differentiated from the other optician retail brand competitors. 3) Furthermore, it has to be cost effective and economic attractive for the optician retail brand to take this position. 4) Finally, it should be sustainable and possible to obtain this position.

Position

We like to refer to position as the brand's physical market place and the mental market place that exists in the mind of the consumers. We like to distinguish between the actual position and the wanted position, and we then use the theory of positioning to close the gab between these two positions. By positioning we mean, how an optician retail brand can create a message in the mind of the consumer that is closely linked to how the brand wants to be perceived. We therefore consider brand image to be of high relevance, as it is defined as how consumers perceive a brand. The choice of positioning strategy therefore influences the brand image and is considered relevant, when analyzing how Thiele can create an attractive position.

Furthermore, we believe that brand personality needs to be touched upon as it refers to a set of human characteristics associated with the brand and therefore influence the position a brand wants to have. A brand personality can differentiate brands in a market where brands are similar in store image attributes, which we assume to be the case in the optician market.

Offerings

When we in the problem statement use the term offerings, we refer to what elements and parameters an optician retail brand can offer the consumers. First of all, this includes the marketing mix of price, assortment and location, and since we are focusing upon the optician sector, we believe that offerings also need to include service, store atmosphere and store design. As we consider the offerings to influence a retailer's store image, we want to use them in relation to how an optician retail brand can differentiate and create an attractive position in the market. In the thesis, offerings will also be described as store image attributes.

4. Assumptions

In this thesis, we consider retail brands and the concepts of building a store image equally to products brands and the image of the manufactures. To elaborate it is assumed to be necessary for an optician retailer to build awareness and influence consumers' perceptions of the optician retail brand to successfully have a strong image and position in the market. Furthermore, it is assumed that consumers form different associations and perceive different optician retail brands and the attributes in the same way as with product brands. That said, there are some distinctions between the retailer brands and the product brands, which must and will be taken into account in the various analyses. These differences are among others related to the more multi-sensory brand experience in the optician stores, and the naturally consistent presence of the stores in consumers' daily environment.

High versus Low Involvement

In connection to the optician retail sector and consumers' needs of glasses, contact lenses and sunglasses, it is considered to be a high involvement purchase decision with some complexity. The price level and the low average frequency by which consumers buy these products, both speak in favour of consumers rarely act impulsive on these needs[4]. In addition, a survey made by Thiele shows, that 71 % of the customers had planned their visit to the store[5]. Furthermore, the need of a new pair of classes or contact lenses is often interconnected with the need of getting clarification and information about one's eyesight and an eye examination is thereby often part of a store visit to an optician retailer. Besides the financial risk or cost,

[4] Arnould, Eric J; Price, Linda; Zinkhan, George M (2005): Consumers p. 281
[5] Appendix 2. Survey by Thiele. – 294 Exit interviews were made in August 2007

the social risk of choosing unfitting and/or unfashionable glasses does also increase consumers' level of involvement.

Moreover, the involvement is assumed to be high in regard to both cognitive and affective involvement, since the purchase goal first and foremost is problem-solving and task completion; to get or retain an optimal eye sight. When the consumers' need of strength of the glasses is examined, the goal adjusts and treats enhancing one's self-esteem and get social acknowledgement for one's taste and looks[6]. Consumers' approach to acquisition is thereby assumed to be a mix between cognitive decision-making and meaning/symbolic related decision-making[7]. To elaborate further, it should be said that the categorical need for glasses and contact lenses are considered as being related to the problem-solving aspect and thereby based on a negative motivation, whereas choosing a particular design and pair of glasses or sunglasses is assumed to be predominantly influenced by consumers' emotions and positive motivations[8]. In this context, we believe that consumers will choose the optician retail brand, which they believe can solve the problem best possible and where the chances of finding the right design and achieving personal satisfaction is perceived as most likely.

Consumers' Response Hierarchies

Since consumers are assumed to be highly involved in the purchase decision process, it should be mentioned that consumers are expected to at least at some level search for information regarding possible optician retail brands and/or the selection or supply of different manufacture brands[9]. Some consumers might search information on the Internet, be more aware of advertisements regarding glasses and ask their friends and families for advices and recommendations. Depending on the consumer's preference for information the preliminary search for information may involve all three of the mentioned sources to none. In addition, consumers with a current need for new glasses are assumed to typically follow the learn-feel-do or feel-learn-do response hierarchies depending on whether the rational and cognitive or the emotional considerations prevail. This has implications for how the optician retail brand should communicate with and approach consumers as focus should be on either information rich advertisements or services, or focus on visual and special imagery affecting

[6] Arnould, Eric J; Price, Linda; Zinkhan, George M (2005): Consumers p. 259
[7] Arnould, Eric J; Price, Linda; Zinkhan, George M (2005): Consumers p. 672
[8] Percy, Larry; Elliott, Richard (2009): Strategic Advertising Management p. 207
[9] Arnould, Eric J; Price, Linda; Zinkhan, George M (2005): Consumers p. 285

consumers emotionally[10]. How consumers seek information and whether they value recommendations from friends and families will shortly be treated in the consumer analysis in order to gather more insights when discussing the recommendations to Thiele.

Consumers' Attitudes and Perceptions

In connection to consumers' attitudes towards the different attributes and also perceptions of the different optician retail brands, we expect the age of the consumers to have influence. This assumption is based on the fact that consumers over the years have more experiences with the optician retail sector, and thereby gain more insights and knowledge. The older the consumer is, the more likely it is that the person has had several visits to an optician retailer and furthermore has had different needs and store experiences. Therefore in this thesis, the consumer groups will be analyzed in groups of 20 – 40 and 40+ year old.

Similar Offerings

As expressed in the problem statement, we do assume that consumers perceive the different optician retail brands to generally have the same offerings concerning the assortments, services and prices. Furthermore, the optician retail brands' store design and locations are also expected regarded as being very convergent and similar. In other words, we expect the consumers to see the different optician retail brands as clustered, and we anticipate that consumers often have some difficulties with separating the optician retail brands from one another.

5. Delimitation

This thesis will concern and focus on the optician retail sector and all theories and models will therefore at all times be applied with the particular sector in mind. Furthermore, the analyses will only trait the Danish market and the optician retail brands, which currently operate within the country. Foreign optician retail brands with online sales, which offer delivery in Denmark, will though be taken into account when relevant. Likewise will other international industry players be implicated if they are considered to affect the Danish market.

[10] Belch, George; Belch, Michael (2009): Advertising and Promotion p. 164

Customer Group

The analyses and recommendations to Thiele will be based on a broad customer group consisting of both the 20-40 and 40+ year old consumers and will not be delimited to a specific defined target group. This is chosen, since the potential customers at an optician retail brand are very complicated to narrow down without excluding a too large group or segment of potential customers. In terms of the demographic and psychographic segmentation criteria, the potential optician customer can be at all ages, both genders and have all levels of income or occupations and finally have all sorts of lifestyles or values. The Danish optician retailers are in general characterized by having services and glasses, which are offered to both children, youngsters and adults and as the optician retailers generally have a wide assortment in terms of designs and price levels, no particular group of consumers is excluded or left out. The chosen segment of the analysis is thereby all men and women in the age above 20. Though it must be mentioned that consumers in the age above 40 are considered to account for a greater amount of possible customers since this group is more likely to have poor eyesight and thereby in need of glasses or contact lenses. In 2002, the Danish Competition Authority made an analysis of the competitive situation within the optician retail sector, and in that connection it was estimated that 50 % of the population above 40 needed glasses or contact lenses while the figure was only 16-17 % for people younger than 40[11]. Even though this is an outdated analysis of the competitive environment, these estimates are considered as valid today with small deviation.

Segmentation and Target Group Selection

The broad target group of consumers above 20 will be employed all through the thesis and a segmentation analysis and a target group screening will not be executed. As explained above customers can be divided by the level of purchase involvement, whether the customers plan their store visit or if they enter as an impulse act. In this thesis, we will focus on the high involvement customers and not examine how an optician retail brand can enhance impulse traffic. This results from our assumption that the majority of the consumers, who consider a new pair of glasses will be involved to some or great extent and thereby rarely buy glasses impulsive without some preceding considerations or actions.

[11] Danish Competition Authority (2000): Konkurrenceforholdene i optikbranchen. P. 5

Consumers of Glasses

We choose to delimit our focus in this thesis to consumers, who already have or are considering buying glasses. The deselection of customers of only sun glasses and contact lenses is due to two reasons. First of all, we want to have the need of eye examinations and professional guidance implicated in our study, which is rarely the case for sunglasses. Secondly, we want to retain the customers' considerations concerning their choice of the final design and look of the glasses. This delimitation might seem to narrow down the amount of potential customers in a too great manner, but figures from Gallup shows that the overall customer potential for glasses in Denmark is 2.756.000 when selecting all consumers above 20. This amount of people corresponds to 58 % of the Danish population, while the figure for consumers using contact lenses is only 472.000 or approximately 10 % of all 20-year-old or above consumers[12].

Store Image, Satisfaction and Loyalty

The store image attributes, which will be treated in this thesis, can have different effects on store image, satisfaction and loyalty. These different influences will be taken into consideration and be discussed when ever relevant, though the actual relationship among the three elements will not be tested or examined in any way.

6. Literature Review

When a retail brand wants to create an attractive retail position, a differentiated store image has to be build. Therefore, we will first examine the literature within the field of retail strategies and how retailers can build a sustainable competitive advantage by focusing on store image. We need to gain fundamental knowledge of the concept of store image from a retailer perspective; how can an optician retailer develop a differentiated store image and which store image attributes are necessary to use? The answers to these questions must be known to make us capable of structuring our thesis and the different analyses.

We will narrow down our literature review to examine the most powerful store image attributes, step by step. Through the review of the different attributes, we will touch upon the

[12] Figures from the total population in TNS Gallup, when choosing the criteria; age of 20 or above, who are using either glasses or contact lenses

different implications and challenges of utilizing them to create a differentiated store image. We shortly want to examine the relationship between store image, satisfaction and loyalty as every optician retail brand aims to create satisfaction among customers and strive to create customer loyalty. Finally, creating a store image is closely linked to the creation of a store personality, which will be touched upon in the end of this section.

6.1 Source Criticism

During the last decades, retail branding has received much attention and the amount of literature within the field is generally massive. However, the authors are typically focusing on narrow or very specific topics in regard to retail branding and positioning, and especially the retail sector of grocery stores and mass merchandise has been explored. Since our focus will be on specialty stores, the findings and implications from a large number of earlier studies must therefore be applied cautiously and not overestimated. Within the field of retail assortment and product brand mix, it is furthermore evident that the continuous development and growing use of private labels are reflected in the amount of research. This topic is considered less important for our thesis, given our more broad focus on the store image attributes. We will however look into the literature regarding this area and in our analysis be aware of and discuss the consequences of having a private label concerning the optimizations of an optician's assortment and the related possible influences on the store image.

6.2 Store Image

Since a growing part of today's retailers are offering the same manufacturer brands and by doing so have to compete on all other aspects including price, it has become more crucial than ever for a retail brand to build it's own store equity and find an attractive position in the market place. Today retailers are perceived as brands themselves rather than as distributors of manufacturer brands, and the rewards for focusing on customer needs, delivering the brand promise and building trust from the customers can be very profitable[13]. According to Keller (1993) and Hartman and Spiro (2005)[14] both product brand equity and store equity are

[13] Varley, Rosemary and Rafiq, Mohammed (2004) 'Principles of retail management'
[14] Keller, Kevin Lane (1993) 'Conceptualizing, measuring and managing customer-based brand equity by' and K.B. Hartman, Kathrine B; Spiro, Rosann L (2005) 'Recapturing store image in customer-based store equity: A construct conceptualization'

constructed out of the brand or store knowledge consisting of the awareness and the image built over time. In this section, we will begin by examining, how a retail brand can build its store image.

Back in 1958, Martineau defined store image as “the way in which the store is defined in the shoppers’ mind, partly by its functional qualities and partly by an aura of psychological attributes” [15]. A store image is thus based on two important elements. The first one ‘functional qualities’ refers to store elements, which to some degree can be objectively compared with those of a competitor, such as offered assortment, price levels, credit and service policies and store layout. ‘Psychological attributes’ on the other hand are subjective elements such as feeling a sense of belonging, friendliness, warmth, interest and excitement[16]. Since these psychological attributes are very complicated in nature and difficult to measure, they are unfortunately often overlooked in the literature. We will though look into these intangible attributes and present which we see as relevant for our further analysis. Furthermore, we will in section 6.5 discuss the importance of having a distinctive store personality, since this psychological element also is seen as highly relevant in regard of building a personal attachment with the customers and earn loyalty.

Since 1958, the work of Martineau has been subject for much study and the literature within this field offers many adjusted or modified definitions of store image. However, all most every writer seems to have hold on to the thought of image complexity, and the suggestion that store image consists of both tangible/functional attributes and intangible/psychological attributes in the mindset of the consumer, is maintained.

One distinct modification came from Lindquist (1975) and James et al. (1976) since they both argue that a store image is not only a simply summation of customers’ various perceptions of the attributes, but a function of the importance weights and interactions among these attributes has to be added to the equation[17]. According to the authors, it is therefore considered

[15] Martineau, Pierre (1958) ‘The personality of the retail store’
[16] Lindquist, Jay D (1975) ‘Meaning of Image’
[17] Lindquist, Jay D (1975) ‘Meaning of Image’ and D.L. James, R.M. Durend and R.A. Dreves (1976) ‘The use of a multi-attribute model in a store image study’

necessary and relevant to examine, which attributes have the highest importance weights and which are of smaller significance in building a particular store image.

In 1992, Keavency and Hunt suggested that a store image is developed by comparing incoming information to existing category information in memory, and they argue a store image is therefore not just a function of the image of a particular store but also of the images and associations in the memory of existing stores and/or retail categories. The consumers are thus not believed to separate their thoughts in connection to different retail brands but instead believed to put all the information together to have an overall impression of the category. A store's image is thereby suggested to be relative to others in the mind of the consumers[18]. The added point of view of relativity is very much aligned with the fact that competitive retailers can affect the image of a certain retailer brand as argued by Auken and Lonial (1991)[19]. Some new offerings from one or several retailers can affect the macro level of consumers' general schematic association of an entire retail category. For instance is it possible that consumers in the future would expect a typical optician retail brand to have self-services online etc., and if retailer "A" + "B" were the first to introduce them, then retailer "C", which has not introduced any of the same services, may now be perceived as outdated, old-fashion or as offering less convenience. Said in another way, a retailer must always be aware of the development among its competitors and the dynamics in the retail category to monitor the alterations and influences on consumers' perceptions.

As touched upon earlier, in spite of the various modifications, most authors agree with Martineau concerning the twofold division of store image attributes between functional and psychological elements. A certain set or amount of attributes has though not been determined or established neither in general or within relevant retail sectors. As a consequence, we now examine the literature in regard to the different suggested image attributes to be able to discuss and select the attributes, which we find applicable and important for our further research.

[18] Keaveney, Susan M; Hunt, Kenneth A. (1992) 'Conceptualization and Operationalization of retail store image: A case of rival middle-level theories' and Hartman, Kathrine B; Spiro, Rosann L (2005) 'Recapturing store image in customer-based store equity: A construct conceptualization'
[19] Van Auken, S.; Lonial, S.C (1991) 'Multidimensional Scaling and Retail positioning'

Lindquist (1975) identifies nine different attributes in his comprehensive literature research. These are; Merchandise, Service, Clientele, Physical facilities, Convenience, Promotion, Store Atmosphere, Institutional Factors and Post-Transaction Satisfaction. After examining these closer Lindquist underline the importance of being aware of 3 certain attributes; Merchandise, Location and Service[20]. In Mazursky and Jacoby's (1986) research on retail image formation, they however present their 3 overall categorizations to be; Merchandise, Service and Pleasantness of shopping at the store, where the last mentioned contains the same elements as Store Atmosphere presented by Lindquist[21]. Ailawadi and Keller (2004) modify these dimensions into; Access, In-store Atmosphere, Price and Promotion and two different Assortment categories. First of all, the price category is added because price competition has intensified heavily compared to the eighties and nineties and secondly, the formation of two separate assortment categories is due to the focus of the authors on private labels[22]. Finally Swoboda et al (2007) present four categories on the basis of their literature review and they are; Service, Price/Value, Assortment and Store Design[23].

To organize the further literature review, we adopt and modify some of the above-mentioned dimensions of attributes and separately focus on their implications for building store image. The chosen five dimensions are Service, Price and Promotions, Store Atmosphere and Design, Assortment and finally Location. It can be argued that these five attributes all seems to be connected to the functional attributes, but service, atmosphere and also the assortment attributes have psychological elements, which will appear in the following discussions.

6.3 Store Image Attributes

In this section, we will examine the literature of the five selected store attributes, which are considered highly relevant for our thesis. Because a differentiated store image is part of creating an attractive position, we will evaluate the underlying elements to each attribute and evaluate which aspects within each attribute are the most valuable for the optician retail

[20] Lindquist, Jay D. (1975) 'Meaning of Image'
[21] Mazursky, David; Jacoby, Jacob (1986) 'Exploring the development of store images'
[22] Keller, Kevin Lane; Ailawadi, Kusum L (2004) 'Understanding retail branding: Conceptual Insights and Research priorities'
[23] Swoboda B; Morschett F.H.D.; Schramm-Klein H. (2007) 'An Intersection analysis of the relevance of service in building a strong retail brand'

sector. Finally, we need to learn more about the essential elements of the store image attributes in terms of relevance and essentiality, in order to create a relevant questionnaire to our consumer analysis.

6.3.1 Service

Looking at the findings contained in the literature, we can clearly identify the importance of service elements in relation to store image[24]. In today's competitive retail environment, the delivery of high service quality has long been treated as the basic of retailing strategy[25]. According to Parasuraman et al.[26], a retail brand can differentiate its retail offerings by developing a sustainable competitive advantage by providing excellent customer service and thus build customer loyalty. Moreover, research has demonstrated that service quality is among the predominant attributes affecting store image and store choice. This supports why the store image attribute of service does have a high relevance for our thesis, and we shall now look more closely into how service is classified in retailing and evaluate the importance of service regarding an optician retail brand.

In the literature, service is generally classified in a number of different ways from a retailing perspective. Westbrook (1981)[27] distinguish between two service categories; in-store experiences e.g. interactions with store employees and experiences related to merchandise including quality and availability of the merchandise plus after sales experiences. Gagliano and Hathcote (1994)[28] refer to another but very clear and simple set of service activity categories that divide service in retailing into 'store service', the extent to which variety, quality and dependability of service can be obtained, and 'sales service', the extent to which prompt and individual service attention can be achieved. The way of clasyfying retail service will be adopted to our thesis, as we believe this distinction is more clear when linking service to optician retail brands.

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[24] Swoboda B; Morschett F.H.D.; Schramm-Klein H. (2007): An intersector analysis of the relevance of service in building a strong retail brand.
[25] Siu, Noel Y.M; Cheung, Jeff Tak-Hing (2001) 'A measure of retail service quality'
[26] Zeithaml, Valarie-A; Berry, Leonard; Parasuraman, A. (1996) 'The Behavioral consequences of Service quality'
[27] Westbrook, Robert A. (1981) 'Sources of Consumer Satisfaction with Retail Outlets'
[28] Gagliano, K.B.; Hathcote, J. (1994) 'Customer expectations and perceptions of service quality in retail apparel speciality stores'

Store Service

Store service concerns areas like returns and exchange policies, guarantees, credit and charge policies, and after sales services[29]. It is arguable that each element of store service is a matter of course for every retailer to have, including the optician retail sector. So the question is, how can optician retail brands differentiate themselves from the competitors in terms of store service? As we consider a purchase of glasses to be high-involvement and in most cases not only a one time purchase, the after sales service is extremely important. Changing frames and glasses, re-check of eye test, and check and adjust frames are examples of after sales service elements, which should have high focus in the optician retail sector.

When evaluating the other aspects of store service, we see that according to Hart (1988)[30], a good guarantee system is identified as unconditional, easy to understand, communicate, meaningful, and easy to invoke and obtain recompense. For an optician retailer, guarantees are indeed heavily linked to after sales service as well as glass insurances. Though, we believe it is important to stress that it is not necessary and effective to promise something customers already expect, have a guarantee in so many conditions that it is meaningless, and finally offer guarantees so mild that they are never invoked. A relevant example is seen, when all optician retail brands guarantee a free eye check and professional educated sales people to give customers the right glasses that will improve their sight. These guarantees are of no consequences as all people do expect this because all the optician retail brands are offering it.

In view of this, we will not use the element of guarantee system independent but consider it to be a part of after sales service, which is seen highly relevant to implicate and analyze in our consumer analysis. As the literature is not focusing a lot on the other aspect of e.g. returns and exchanges as mentioned at the beginning, we do not go deeper into to them in the thesis.

[29] Gagliano, K.B.; Hathcote, J. (1994) 'Customer expectations and perceptions of service quality in retail apparel speciality stores'
[30] Hart, Christopher W.L (1988) 'The power of unconditional guarantees'

Sales Service

Sales service is linked to helpfulness, friendliness, and competence of the employees.[31] There are several findings suggesting that, from a retailer's perspective, service elements provided by appropriate and competent salespersons certainly are a critical success factor[32]. Netemeyer and Maxham (2007)[33] distinguish between in-role behaviors, in which employees' behavior is determined by the retailer brand's guidelines and then extra-role behavior, for which employees use their discretion.

Among others, in-role behaviors deal with employees' competence and abilities, which are important factors influencing consumers' willingness to buy[34]. This indeed stress' the importance of sales personnels' giving the required professional expertise when customers are having an eye test and need new glasses with the correct strength. Though, it can be argued that this competence is not sufficient for optician retailers today. The personnel expertise of serving customers with fashionable knowledge to find the right glasses that fits the customer's facial shape is an important element of the personnel service as well. In addition to this, it can be discussed if the aspect of being serviceminded and helpful is a part of todays in-role behaviors and not extra-role behavior. Today, it is not unusual to 'guide' and 'train' the personnel in service techniques in order to secure good and consistent service through out all stores.

Another important element of sales service is the waiting time when a customer comes into a store. Having an eye test or finding a new pair of glasses requires personal assistant, which means the store personnel should be welcoming and helping customers as soon as they enter the store. According to Gilbert (1999)[35], it is important to remember that unoccupied time is perceived to be longer than occupied time and uncertain waits are more stressful than expected waits. This only highlights the importance of excellent sales service. Also the

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[31] Gagliano, K.B.; Hathcote, J. (1994) 'Customer expectations and perceptions of service quality in retail apparel speciality stores'
[32] Babin L.; Babin, B;.Boles, J. (1999) 'The effects of consumer perceptions of the salesperson, product and dealer on purchase intention'
[33] Netemeyer, Richard G. and James G. Maxham III (2007) 'Employee versus supervisor rating performance in the retail customer service sector'
[34] Wang, Guangping; Netemeyer, Richard G. (2004) 'Salespeople creative performance'
[35] Gilbert, David (2003) 'Retail Marketing Management' p. 121

employees' friendliness and general presentation play a central role [36]. How customers are met when they are entering an optician store is a part of the first impression that will be remembered. How the employees are dressed and the signals the employees are sending in terms of postures and attitudes are also elements that affect the general perception of good service.

Finally, sales service will shortly be touch upon in section 6.3.4 in regard to the knowledge of product information and how sales personnel should be able to find a balance in between overwhelming the clients with too many products and leave them in doubt concerning the selection of assortment.

<u>Online Service</u>

In the literature, online service is mainly examined in relation to buying products online. As consumers cannot purchase glasses online on the optician retail brands' homepages but only find information, we will not focus on every online attributes that are examined in the literature. Fernie, Fernie, and Moore (2003)[37] argue that online attributes fall into the following categories: navigation and convenience, merchandise mix, pricing, customer service, and security.

We believe that customer service embraces some of the other mentioned areas of navigation, convenience and security. Navigation and convenience are related to a consumer's ability to reduce time and effort when buying products online. It can be argued that this is valid to every homepage in general, including the optician retail brands' homepages as well, even though the customers cannot buy products online. To be able to easily navigate around at a homepage and find the necessary information, help, advises etc., are essential for every homepage. Security is not relevant for our thesis as it is only linked to the actual online buying process.

In general, online customer service strives to optimize the convenience of shopping online instead of going to the store and is often linked to the buying process and information about

[36] Schneider, Benjamin; Bowen, David E (1999) 'Understanding customer delight and outrage'
[37] Fernie, John; Fernie, Susanne; Moore, Christopher (2003) 'Principles of Retailing' p. 260

the after sale service. The last mentioned is closely linked to the element of 'store service' and is therefore relevant for our thesis. We also like to consider online customer service as optimizing the general convenience of service linked to shopping, not only online. E.g. when a customer wants to book an appointment for a new eye check, it can be booked online instead of calling or visiting the actual store. This is considered to be a part of online customer service as well.

Service Quality

Customer evaluations of service quality are often discussed in the literature. Vargo, Nagao and Morgan (2007)[38] say that when customers evaluate retail service, they compare their perceptions of the service they receive with their expectations. Customers are satisfied when the perceived service meets or exceeds their expectations and they are dissatisfied when they feel the service falls below their expectations.

In the literature, there is a general agreement that a basic retailing strategy for creating a competitive advantage is the delivery of high service quality (e.g. Berry 1986, Hummel and Savitt 1988, Reichheld and Sasser 1990)[39]. Service quality is defined as the customer's assessment of the overall excellence or superiority of the service[40], and therefore a combination of store and sales service as mentioned above. That means when a retailer wants to create a competitive advantage within service, it cannot be done by only changing or improving one of the two service areas as they are both affecting service quality.

6.3.2 Price and Promotions

When reviewing the literature focusing on retail pricing and promotion strategies it is immediately apparent that this attribute is focal in the creation of a store image, which is due to the fact that price in the eyes of the consumers is both tangible and often comparable. This

[38] Vargo, Stephen L; Nageo, Kaori; He, Yi; Morgan, Fred W. 'Satisfiers, dissatifiers, critical, and neutrals: A review of their relatively effects on customer (dis)satisfaction'
[39] Siu, Noel Y.M; Cheung, Jeff Tak-Hing (2001) 'A measure of retail service quality'
[40] Zeithaml, Valarie-A; Berry, Leonard; Parasuraman, A. (1996) 'The behavioral consequences of service quality'

store image attribute therefore typically needs to be viewed upon in very relative terms, which is caused by the fact that consumers over time create and have a general store price perception, which is based on comparing their perceptions of different stores[41]. Furthermore, price and promotions are perceived in relative terms at the point of purchase when customers evaluate the different offers and product brands placed next to each other on the shelves.

Price perceptions are continuously formed and used by consumers in their decision making process, both in regard of choosing which store to visit and which product or service to buy. When looking further into how consumers perceive price, the literature seems to suggest that price has both positive and negative roles[42]. Price is in the positive perspective related to quality, prestige or status to the consumer, whereas the negative aspect is related to the economic sacrifice, and thereby the monetary expenditure that the consumer must incur in order to make the particular purchase[43]. When an optician retail brand is deciding and setting the price levels, it must therefore be ensured that the prices are rightly balanced and aligned with the strategies concerning the other attributes. Pricing strategies must in other words be consistent with the existing strategies of the optician retail brand, which communicates the retailer's overall positioning strategy and value proposition. If the strategies are not aligned, consumers will have conflicting perceptions of the retailer and be incapable of evaluating the optician retail brand when deciding which store to visit[44].

First and foremost, the price strategy naturally needs to be profitable for the optician retail brand. To stay in business every company needs to at least cover its costs, and some price strategies are therefore not possible to obtain for every retail brand. If an optician retailer for instance have above average costs for having the best locations, service qualities or widest assortment, it presumably would not be possible to compete only on price and take a low-price position in the market, since the margins would be to limited or even non-present. On the other hand, if an optician retail brand has a discount strategy with too high prices, it would

[41] Dodds, W.B. (1995) 'Market cues affect on consumers' product evaluations'
[42] Moore, Marguerite; Carpenter, Jason (2006) 'The effect of price as a marketplace cue on retail patronage'
[43] Lichtenstein, Donald R.; Ridgway, Nancy M.; Netemeyer, Richard G. (1993) 'Price perceptions and consumer shopping behavior: A field study'
[44] Moore, Marguerite; Carpenter, Jason (2006) 'The effect of price as a marketplace cue on retail patronage'

make the stores unattractive and uncompetitive in the eyes of the consumers and would thereby go out of business due to lacking turnover.

Two other important aspects should be considered when discussing different price strategies. Firstly, differences often occur between consumers' perceptions of price levels and the actual prices offered. Brown[45] (1969) highlighted the difference between consumers' perceptions of price levels in various stores and reality, showing that consumers may use non-price related cues like service offerings and quality levels to form their price perceptions. An optician retail brand therefore has to be aware that claiming to be either a low-priced alternative or a high-end but value for money retailer may not be convincing and fully interpreted only be setting the price level accordingly. As mentioned before and hereby stressed, the price strategy is to a high degree dependent and needs to be aligned with the overall strategy of the retail brand. We will look closer into this in both our market and consumer analysis since we want to examine whether the optician retail brands are perceived as having the price level, which the optical retailers have implemented, or if there are any gaps between the perceived and actual price.

Secondly, low price-transparency seems to be of big influence in the creation of consumers' price perceptions. The composition of both glasses and frames and installment payments are assumed and expected to make it difficult for the consumers to compare prices in the optician retail sector. For this reason, we will look further into this in our consumer analysis and try to clarify whether or not low price- transparency is experienced. In addition, the consumers' overall perceptions of the optician retail brand's price levels and the importance of the price and promotion attribute will also be examined.

6.3.3 Store Atmosphere and Design

In retailing, design and atmosphere has always been important as the store image can be strengthened by creating links between the selling space, the brand personality, product

[45] Brown, Francis E. (1969) 'Price image versus price reality'

design and display[46]. In a matured retail market, innovative design and atmosphere is a way of keeping the retail offerings fresh and providing differentiation from the competitors[47]. As the optician retail sector has existed for many years with the same type of products; glasses, contact lenses and sunglasses, it can be seen as a matured retail market. It stress the importance of analyzing this attribute of store atmosphere and design.

Store Atmosphere

The concept of atmospherics was introduced by Philip Kotler and he refers to it as the design of an environment through visual communication, lightning, colors, music, and scent that stimulate customers' perceptual and emotional responses and ultimately affect their purchase behavior[48]. For retailers, including optician retail brands, it is important to develop atmospherics that complement other aspects of the store design and the merchandise, and research has shown that it is important for these atmospherics elements to work together[49]. Baker et al. (2002)[50] have highlighted the area of in-store atmosphere and divided it into 1) physical features like design, lighting, and layout 2) ambient features like music and smell, and 3) social features like type of clientele, employee availability and friendliness. In this section we will not examine the social features as we think of it to be part of the attribute service (sales service).

A retailer's in-store atmosphere does influence consumers' perceptions of a store's image, whether or not they visit a store, how much time they spend in it, and how much money they spend (Bellizzi, Crowley, and Henderson 1983; Milliman 1982; Eroglu and Machleit 1990; Grewal et al. 2003)[51]. The impact of the store's environment depends on the customer's shopping goals. There are two basic shopping goals; task completion, and recreation[52]. Based on our assumption, the shopping goal of buying new glasses is first and foremost related to

[46] Varley, Rosemary and Rafiq, Mohammed (2004) 'Principles of Retail Management' p.168
[47] Varley, Rosemary and Rafiq, Mohammed (2004) 'Principles of Retail Management' p.168
[48] Kotler, Philip (1970) 'Atmosphere as a Marketing tool'
[49] Spangenberg, Eric R.; Sprott, David E.; Grohman, Bianca; Tracy, Daniel L. (2006) 'Gender-Congruent Ambient Scent Influences on Approach and Avoidance Behaviors in a Retail Store'
[50] Baker, Julie; Parsuraman, A.; Grewal, Dhruv; Voss, Glenn B. (2002), 'The Influence of Multiple Store Environment Cues on Perceived Merchandise Value and Patronage Intentions'
[51] Keller, Kevin Lane; Ailawadi, Kusum L (2004) 'Understanding retail branding: conceptual insights and research priorities'
[52] Levy, Michael; Weitz, Barton A. (2009) 'Retailing Management' p. 532

task completion. With this is mind, we are now ready to look deeper into which elements that are important when influencing task completion shoppers.

In reference to the physical features, good lightning in a store involves more than just simply illuminating space. Lightning can add value to a store atmosphere by highlighting merchandise, sculpting space and capturing a mood or feeling that enhance the store's image[53]. Having the appropriate lightning has showed to positively influence customers' shopping behavior[54]. When customers are shopping to 'complete' a task, they prefer to be in a soothing, calming environment – a simple atmosphere with no or slow music, cold colors and dimmer lightning[55]. Thus, these elements should exist in an optician retail store. However, we do not believe this is the case for lightning, as optician stores use a lot of bright lightning to light up the assortment and to highlight all the mirrors, when customers are trying glasses. For our thesis, we therefore ignore the statement of dimmer lightning.

The use of color can enhance a retailer's image and help create a mood. Looking at the optician sector, the majority of optician retail brands are using cold colors for interior, which are the correct colors to use according to the literature that states; warm colors like red, gold, and yellow produce emotional, vibrant, hot, and active responses, whereas cold colors like white, blue, and green have a peaceful, gentle, and calming effect[56].

Retailers can also use music to affect customers' behavior and unlike the other atmospheric elements music can easily be changed. Music can create an image, and attract or direct costumers' attention. In general, relatively soft music encourages shoppers to slow down, relax and take a good look at the merchandise[57]. Finally, a retailer can use the element of scent that based on research has been proofed to have a positive impact on impulse buying

[53] Levy, Michael; Weitz, Barton A.'Retailing Management' p. 530
[54] Baker, Julie; Grewal, Dhruv; Levy, Michael; Voss, Glenn B. (2003) 'Wait Expectations, Store atmosphere and Store patronage Intentions in service-intensive retail stores'
[55] Levy, Michael; Weitz, Barton A. (2009) 'Retailing Management' p. 532
[56] Brengmann, Malaika; Geuens, Maggie (2003) 'The four diemnsional impact of color on shopper's emotions'
[57] Levy, Michael; Weitz, Barton A. (2009) 'Retailing Management' p. 531

behavior and customer satisfaction[58]. As glasses do not give of any scent, optician retailers have the possibility to use ambient scent that does not originate from any particular object.

Store Design

In the literature, we find that a retail store design is usually build upon the elements of layout, signature and feature[59].

According to the literature, a retail store layout has to reflect the brand position[60]. This is indeed important in highly competitive retail sectors, like we assume the optician sector to be, and is therefore an interesting and relevant aspect to remember. The store layout has to be aligned with the brand's position and brand personality. Secondly, a retail store layout should be designed to facilitate the movement of customers, to create a planned store experience and to allow the optimal presentation of merchandise[61]. As optician stores are relatively small and simple to navigate in compared to e.g. grocery stores, we will not pay any further attention to this.

Signage and Graphics is the second element of store design, which can help customers locate specific products and departments, provide product information, and suggest items of special purchases. By using visual communication, a retailer can help the customer through the store but because optician stores are smaller shops, this type of signage is often reduced. Though, we do believe that signage at the entrance and in windows can be used to attract consumers' attention. This is especially important for optician retail brands to remember, if consumers do not have a preference for only one optician store. E.g. signage of manufacturer brands is highly used in the optician retail sector to gain the attention from the designer loyal consumers. In addition, signage of new arrivals is also a tool to get people's attention. In general, a visual attraction is essential when passing or entering a store and signage can

[58] Chebat, Jean-Charles; Michon, Richard (2003) 'Impact on ambient odors on mall shoppers emotions, cognition, and spending: A test of competitive casual theories'
[59] Levy, Michael; Weitz, Barton A. (2009) 'Retailing Management' p. 512
[60] Gilbert, David (2003) 'Retail Marketing Management' p. 124
[61] Gilbert, David (2003) 'Retail Marketing Management' p. 124

indeed secure this. Furthermore, we believe graphics such as photo panels are relevant too, as it can add or enhance the brand personality of a store's image[62].

In summary, a pleasing store atmosphere and store design provides substantial hedonic utility to consumers and encourages them to visit the store more often, stay longer, and buy more[63]. From a branding perspective, Keller and Ailawadi (2004) states that an appealing store atmosphere and store design offers much potential in terms of building a differentiated store image, especially if the products and brands stocked by a retailer are similar to others. The ability to create a strong in-store personality and rich experiences can play a crucial role in positioning and creating a competitive advantage and is indeed valuable to know when we are to discuss Thiele's positioning strategies.

6.3.4 Assortment

The assortment or merchandise attribute is contained and mentioned in almost every paper and literature regarding store image attributes and satisfaction, which is quiet natural since a retailer's reason for existence is based on selling merchandise[64]. The choices of the overall merchandise categories offered at the store can be said to initiate all other aspects of being a retailer, since the assortment puts the retailer in a category themselves, e.g. grocery store, furniture outlet or an optician store. The assortment attribute alone encompasses many different factors, but the most repeated and discussed are quality and the depth and breadth of the product assortment.

Quality

When reviewing the literature, it is apparent that quality of the assortment has influence on store image, which is due to the fact that the product brands images are also projected on to the image of the retailer. Empirical findings imply that a retailer can improve its image by

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[62] Levy, Michael; Weitz, Barton A. (2009) 'Retailing Management' p. 516
[63] Keller, Kevin Lane; Ailawadi, Kusum L (2004) 'Understanding retail branding: conceptual insights and research priorities'
[64] Swoboda B; Morschett F.H.D.; Schramm-Klein H. (2007) 'An Intersection analysis of the relevance of service in building a strong retail brand'

offering product brands which are evaluated favorable by the consumers, but on the other hand offering less favorable product brands or even brands with bad images could also damage the retailer[65]. It is therefore very important that the retail brands continuously study the customers' product brand preferences and keep the assortment aligned and updated, and ensure assortment at all times meets the needs and expectations of the costumers. The task of having the right brand mix offerings in the stores is therefore a very critical task for the optician retail brand, but when done successfully it can also have great advantages and help building a strong differentiated image, which enhance store traffic and turnover.

A possibility for an optician retail brand could be to ensure exclusive rights for certain product brands and designers. If consumers have strong preferences for a particular product brand, they might be prepared to visit the store offering this product brand only because of the presence of that brand. The projection of the product brand images would also be even more profound and only achievable for the retailer, which possesses the exclusive rights. In some case paying an extra fee to the manufactures or license agencies could therefore be beneficial and profitable. In a highly competitive market like the optician retail sector, this seems as a relevant possibility worth treating, which is why we will look further into this in connection to Thiele's positioning strategy and when looking upon the recommendations of Thiele's differentiated store image.

Assortment Breadth and Depth

When focusing on the breadth and depth of the assortment, the cross-category assortment is in nature of less importance, since we focus on optician retailers, which are within the category of specialty stores. However, it does seem important that a particular optician retail brand offers at least the product category selection, which is expected by consumers when thinking of a certain retail category. If a retailer's breadth of assortment is too distinguished or limited compared to the competitors' and the sector in general, consumers might not consider the retailer in their store choice decision-making[66]. In regard to the optician retail sector, this

[65] Mazursky, David; Jacoby, Jacob (1984) 'Linking brand and retailer images – do the potential risks outweigh the potential benefits?'
[66] Keller, Kevin Lane; Ailawadi, Kusum L (2004) 'Understanding retail branding: Conceptual Insights and Research priorities'

could indicate why an optician retail brand offer glasses, sunglasses and contact lenses and also eye examinations and sight tests to be truly accepted and build salience among the consumers.

According to Keller and Ailawadi[67] (2004) the depth of a retailer's assortment is also an important dimension of store image and a key driver of store selection. First of all, a great depth and large category selection increases the likelihood that consumers will be aware of the store and thereby ensure that they consider the store in the first place. Moreover, a wide-ranging assortment will also enhance consumers' belief in that they will find the item they desire and thereby convince them that the visit will be worthwhile. If consumers perceive the assortment of brands, designs and sizes to be extensive, the variety seeking consumers will additionally perceive greater utility and consumers with uncertain preferences will also believe they have more flexibility in their choices[68]. Offering an almost unlimited category selection is however not only costly for the retailer, but can also affect the consumers negatively. Consumers will not be able to process all the information regarding the range of the assortment anyway, in fact it might only disturb consumers' instinctive attempt to create an overview when deciding which store to visit. A too extensive selection might also impact the customers at the store in such a way, that they end up feeling overloaded, insecure and confused and actually decrease the likelihood of purchase[69]. An optician retail brand therefore has to find the right balance, and the staff must not overwhelm the customers with too many alternatives and selection information.

Some studies have shown that consumers rarely have perfect information regarding a retailer's assortment, either in regard to the breadth or depth of the assortment or the product brands offered within different categories[70]. In addition, Porter and Claycomb[71] (1997) demonstrate that having an anchor product brand or few product brands with high recognition is more significant in enhancing a retailer's image, than having a broad selection of brands

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[67] Keller, Kevin Lane; Ailawadi, Kusum L (2004) 'Understanding retail branding: Conceptual Insights and Research priorities'
[68] Kahn, B. E.; Lehmann, D. R (1991) 'Modeling Choice among assortments'
[69] Kahn, B.E.; Huffman, C. (1998) 'Variety for sale: mass customization or mass confusion?'
[70] Amine, Abdelmajid; Cadenat, Sandrine (2003) 'Efficient retailer assortment: a consumer choice evaluation perspective'
[71] Porter, Steven S.; Claycomb, Cindy (1997) 'The influence of brand recognition on retail store image'

with high recognition. In summery, it could therefore seem to be most advantageous for an optician retail brand to focus on a few product brands or designers with high recognition, which are strongly favored by consumers and perceived to be of high quality. This does not only make sense from an economical perspective but after reviewing the literature, it is also considered to possibly have the most positively effect on the store image of the optician retail brand. In our consumer analysis, we will examine both the importance of the assortment attribute and also try to see if the participants have any awareness of different designer brands and if so, whether or not the brands are connected to any particular optician retail brand.

Private Labels

In the literature, one specific aspect of optimizing a retailer's assortment has got much attention and that is the questions concerning private labels. In the majority of retail sectors, the retailers mainly carry manufacturer product brands, but increasingly, many retailers also choose to offer private labels, and some even exist only on the basis of private labels such as the English Mark and Spencer. The explanation behind the increasing use of private labels should properly be found in the numerous advantages provided by the addition of a private label in the assortment. In the literature, three arguments are especially speaking in favor of introducing a private label. First of all private labels typically provide retailers with higher percent margins, and secondly having a private label in many cases shift powers towards the retailers when negotiating with manufactures. Thirdly having a well-recognized private label, which is perceived to be of high quality or more precisely as a value for money alternative, could enhance retail image and loyalty[72]. The challenges connected with introducing a private label are though not straight-forwarded or without risks. The investment needed to introduce a successful private label is above all the biggest barrier, since a private label must have a certain salience in the consumers' mind, and furthermore be perceived and considered as a real alternative to the existing product brand offerings. The needed expertise to introduce and promote a private label might not be present within the retailer's organization, and the needed resources to build awareness and an image might be inadequate to make the launch successful. If the launch ends up being unsuccessful, it could furthermore not only mean that the retailer has lost a lot of capital but also result in damaging the store image. Just as a well-

[72] Keller, Kevin Lane; Ailawadi, Kusum L (2004) 'Understanding retail branding: Conceptual Insights and Research priorities'

established private label could improve the image of the retailer, the opposite could also happen and for some retailers the risk of damaging an otherwise strong image could be enough of a reason to reject the idea of introducing a private label.

In summary, the implications of having private labels in the optician sector are considered to be just as complex as discussed above, and the strategically decision whether or not to introduce a private label should be made by the top management based on heavily analysis regarding the customers' preferences and the competitive situation among the existing brand products offered in the stores. In other words, the decision whether or not to introduce a private label seems even more comprehensive and related to higher risks compared to deciding whether or not to add a new service, make some in-store design changes or perhaps take in an additional manufacturer product brand. In our market analysis, we will look into which optician retail brands have introduced a private label and discuss the implications of this introduction. However, we will not thoroughly examine the private label collection introduced by Thiele, since such an analysis is beyond our scope of this thesis.

6.3.5 Location

In the literature, location has long been recognized as one of the prime determinants of store choice and success in retailing[73]. Today, it has been acknowledged that location no longer explains most of the variance in store choice decisions and the main reason to retailers' success, as the other attributes are influencing consumers' store decision choice. Though, it can be argued to be a key component for two reasons: satisfy consumer needs for convenience and accessibility plus at the same time enhance the competitive advantage for a retail brand[74].

The location of a store and the distance, which consumers must travel to go shopping are basic criteria in their store choice decisions[75]. In addition, store visibility is an element often discussed in the literature that does effect consumers' decision of choosing one store over

[73] Varley, Rosemary and Rafiq, Mohammed (2004) 'Principles of Retail Management' p. 145
[74] Varley, Rosemary and Rafiq, Mohammed (2004) 'Principles of Retail Management' p. 146
[75] Keller, Kevin Lane; Ailawadi, Kusum L (2004) 'Understanding retail branding: Conceptual insights and research priorities'

another[76]. In the optician retail sector, it can be argued that convenience and visibility play an important role as the optician retail brands do have similar offerings. Though, we do believe that today convenience is in general guaranteed because of the high expand of stores. This is also closely linked to why retail brands in general have a high visibility and presence in consumers' every day surroundings. In addition to this, a reasonable assumption to high visibility is due to window sections, the façade itself and street displays at the entrance.

In theory, it has lately been discussed that online retailing have made location somewhat less central as a store choice criteria. Because the optician retail sector is not highly characterized by online retailing[77] we do not take this statement into account.

Bell, Ho, and Tang (1998)[78] also find that location no longer explains most of the variance in store choice decisions. They argue that store choice decisions seem to be consistent with the development in consumers' optimization of their total shopping costs and time in which effort to access the store location being one component of their fixed cost of shopping. This development is closely linked to convenience and might be one explanation to why optician retail brand stores are scattered all over Denmark, from big cities to provinces and due to the power of visibility, the different optician retail brand stores are often placed in clusters.

Finally, we do believe that location can influence the store image. We assume that the expected outcome of having a prestigious location near a high-end designer store or at specific expensive address is an improved image. A retailer can benefit from other retailers' image just like some manufacturer brands rub off the image of the retailer.

In the thesis, we want to analyze how important and relevant this store image attribute is to the optician retail sector as the literature claims it is loosing its' relevance in today's retail industry.

[76] Levy, Michael; Weitz, Barton A. (2009) 'Retailing Management' p. 224
[77] Meeting with Thiele, Frederik Brandt
[78] Bell, David; Ho, Teck-Hua; Tang, Christopher (1998) "Determining Where to Shop: Fixed and Variable Costs of Shopping"

6.4 Store Image, Satisfaction and Loyalty

In the literature, the dependency and relationships among store image, satisfaction and loyalty have been the subject for much research, and it has become evident that the above-discussed elements of store image attributes can have different effects. This section will therefore draw attention to the most important findings and discuss the implications from an optician retail brand's point of view.

First and foremost, it must be stressed that to be a successful retailer it is assumed necessary to excel in attracting new customers, keeping current customers satisfied and thereby loyal to the retail brand. How a strong store image influences satisfaction and loyalty is therefore vital to understand to be able to improve the overall performance of the retailer. Bloemer and Ruyter (1997)[79] studied the relationship between the store image, store satisfaction and store loyalty and examined whether store image directly has a positive influence on loyalty, or if store image has an indirect positive effect on loyalty through store satisfaction. Their findings showed that store satisfaction is a mediator in the relationship between store image and store loyalty and to ensure loyal customers it is thereby essential to keep customers satisfied. Since satisfaction is positive related to store image, a retailer will though not succeed in having loyal customer without being perceived to have a strong image.

If the result of Bloemer and Ruyter's research is valid for optician retail brands, the management needs to recognize that improving store image is crucial. However if the challenge is to enhance customer loyalty, they must monitor satisfaction and ensure that the customers' expectations are always met.

Miranda et al (2004)[80] made a research concerning the relationship between different store attributes and the customers' responses in regard to store satisfaction and store loyalty. The results showed that only the sales assistance variable contributed significantly to both the influence of the two effect variables. Price and promotions, product range and store ambience/layout all influenced store satisfaction together with sales assistance while loyalty

[79] Bloemer, J.M.M.; Ruyter, K. de (1997) 'On the relationship between store image, store satisfaction and store loyalty'

[80] Miranda, Mario J.; Kónya, Laslo; Havrila, Inka (2004) 'Shoppers' satisfaction levels are not the only key to store loyalty'

programs, size of the bill and shelf signage and again sales assistance were significant influencers of store loyalty. Even though this survey was made based on grocery stores and the respondents were questioned about their frequent and daily purchases, it seems important to acknowledge the overall results. The different store attributes are in this research proven to rarely affect both loyalty and satisfaction but only one of them. An optician retail brand has to understand that adjusting or improving some attributes may have different outcomes and influence satisfaction and/or loyalty differently depending on which attribute the improvements concern.

As sum up, store image is considered vital for a retailer to succeed and no matter if the store image directly or indirectly affect store loyalty, the stronger the image the more likely a retailer is to be chosen in the first place, deliver satisfaction and enhance store loyalty. In our consumer analysis, we will be aware of the fact that the five different attributes can have diverse effects, and will therefore examine which of the attributes seem to be most important for store selection and which are influencing store satisfaction and patronage. This will among other things be accomplished by examining if the factors that are perceived to be important for a satisfactory store experience are also the factors, which influence the consumers in regard to whether or not they will return to the same store or recommend it to others.

6.5 Brand Personality

As we have just seen in the previous paragraph, there is a close link between store image, loyalty and satisfaction. Keeping customers satisfied and finding ways of encouraging customers to build a relationship with a retail brand is crucial for any optician retail brand. Well positioned brands mould the image into a brand personality that can easily be understood and accepted and therefore reinforce the store image[81]. As brand personality increases consumer preference and usage[82], evokes consumers' emotions[83] and increase levels of satisfaction and loyalty[84], we consider brand personality as being relevant and important to understand in continuation of the previous analyses made. Even though, it must be stressed that it has not yet been determined, whether brand personality dimensions are applicable to all retail brands.

[81] Gilbert, David (1999) 'Retail Marketing Management' p. 312
[82] Sirgy, Joseph M. (1982) 'Self-concept in Consumer Behavior'
[83] Biel, Alexander (1993) 'Converting image into equity'
[84] Fournier, Susan (1994) 'A Consumer-Brand Relationship Framework for Strategy Brand Management'

In the literature, the most acknowledged definition is made by Aaker (1997)[85] 'Brand personality is the set of human characteristics associated with a brand'. According to Keller (1993)[86], brand personality tends to serve a symbolic or self-expressive function. This is often due to the fact that consumers imbue brands with human personality traits that they relate to one's own self[87]. Belk (1998)[88] stress that brand personality is a way to differentiate a brand in a category, it creates an effective added value, and it is reflected in the way consumers describe a brand[89].

Brand personality can be accessed through 5 factors, the personality traits created by Aaker (1997)[90]: *competence* (reliable, intelligent, successful), *sincerity* (down to earth, honest, wholesome, and cheerful), *excitement* (daring, spirited, imaginative, and up-to-date), *sophistication* (upper class and charming), and *ruggedness* (outdoorsy and tough). These personality traits will be applied, when we in our consumer analysis will look at the brand personalities of the optician retail brands. In addition to these personality characteristics, brand personality also includes demographic characteristics such as gender and age[91], which in regard to the optician retail brands will be determined later in the thesis. Moreover, we will use 50 words that are both attribute and personality oriented and applied in terms of top of mind associations.

Finally, we want to use the aspect of brand personality when we at the end of the thesis are to discuss the most attractive position for Thiele and will recommend which brand personality should be linked to that position.

85 Aaker, Jennifer L. (1997) 'Dimensions of Brand personality' – Journal of Marketing Research'
86 Keller, Kevin Lane (1993) 'Conceptualizing, Measuring and Managing Customer-Based Brand Equity'
87 Fournier, Susan (1994) 'A Consumer-Brand Relationship Framework for Strategy Brand Management'
88 Belk, Russel W; Tian, Kelly (1988) 'Possessions and the extended self'
89 Gilbert, David (1999) 'Retail Marketing Management' p. 312
90 Aaker, Jennifer L. (1997) 'Dimensions of Brand personality'
91 Levy, Sidney J. (1959) 'Symbols for Sales'

7. Method

The purpose of this section is to account for our methodical approach and considerations, which are related to the thesis' theoretical, empirical and analytical procedure. In our work with this thesis we have made some considerations and assumptions, which have influence on how we work with our problem statement, and how we perceive the world within the scope of our thesis. The challenge is to be conscious of our considerations and to make them visible, since it will make us able to reflect on the implications they have on the process and result. We will strive to avoid our decisions influencing the validity negatively and aim to make our methodical considerations transparent and evident to pass on the results of this thesis as reliable as possible.

7.1 Science Study Perspective

Our methodological approach in this thesis is founded in holism. The thesis is thereby based on a perspective, which emphasizes that a phenomenon should be regarded as a whole and that the components should not only be looked upon separately. The components are moreover considered as dynamically interrelated or interdependent, and the whole is believed to be greater than the sum of the parts[92]. This perspective is applied both in regard to how we understand and view upon an optician retail brand and the industry but also in connection to the consumer perspective.

In connection to an optician retail brand, it should be evident from our literature review that the customers' brand experiences are a combination of a complex mix of influences and perceptions. When we analyze the optician retailers, we therefore need to understand that the brand experience offered to the consumers is multi-fold, and the marketing mix must be seen as a whole. The holistic perspective is thereby evident in how we have made our literature review concerning the store image attributes.

[92] Philips, Charles D. (1976): Holistic Thought in Social Science.

In developing the optician brand concept, all components of the formula are important and due to our methodological approach, we need to be aware of all aspects concerning both the rational and emotional values of a brand[93]. It can seem straight-forward to state that e.g. price and assortment strategies need to be aligned and seen as interdependent but due to our holistic perspective, we should always try to understand how changes in one attribute might affect the others and also the entire offering and brand promise.

Moreover, we shall not consider an optician retail brand as isolated, but be aware of that the consumers' perceptions of the different brands are mixed together in their minds and memory, and that an optician retail brand is always considered relatively to the others. In addition, we also have a holistic perspective towards the entire optician retail sector, since changes in some part of the industry are believed to have some or great influence on the sector as whole. An implementation of a certain strategy by one of the optician retailers is considered to possibly lead to counteractions from the competitors. Any market characteristics or changes should thus not be evaluated isolated but be viewed upon in the context, which they are a part of.

When looking upon the holistic perspective within the field of consumer behaviour, it must be stated that we consider the consumers as whole human beings with both psychical and physical needs, and we believe a person only functions if all human needs are taken into account. As already pointed out, the consumers' perceptions of an optician retail brand are considered to be complex and contain experiences of and attitudes towards the different attributes. In this thesis, it is therefore seen as crucial that the consumers' thoughts are compiled and gathered to create an understanding of the overall image, and how the optician retail brand as a total is perceived and positioned in the minds of the consumers.

Finally as described earlier, we presume the consumers' approach to acquire glasses concerns both cognitive and emotional considerations and we always need to be aware of the consumers' total interpretation and not analyze different elements separately.

[93] Van Tongeren, Michael (2002): Retail Branding/Platform Development: The holistic approach to retail branding.

7.2 Thesis Structure

The aim of this section is to create an overview of our thesis and explain how we have structured our analyses. The thesis structure is very much aligned with and follows our four research questions and thus complies naturally with our working process.

First and foremost, we conducted a literature review concerning retail branding and how to build a differentiated store image. The review was among others completed to gain knowledge of the concept of store image from a retailer perspective and to find, which store image attributes should be applied in our analyses. The literature review resulted in the selection of five store image attributes; Service, Assortment, Price, Location and Store Design and Atmosphere, which therefore will be integrated in our market analysis and later be examined further in our empiric consumer analysis.

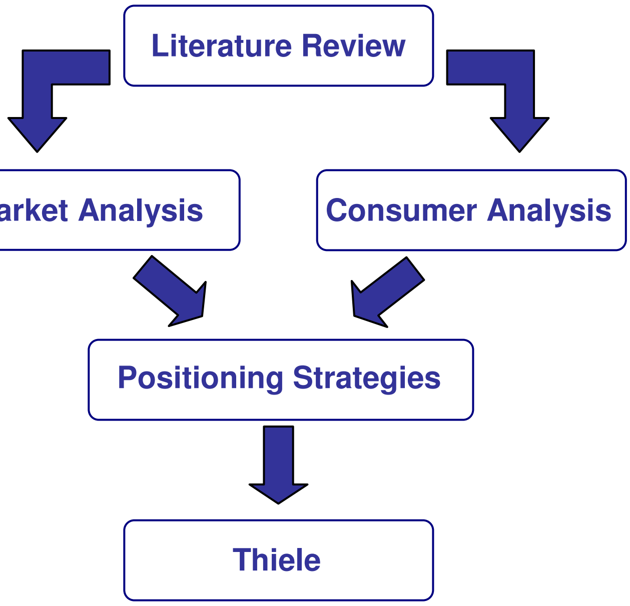
When focusing on the market analysis, our aim is to create an understanding of the current competitive situation in the optician retail sector and gain insights about the different retail brands and their current market positions. To be able to answer our first research question, we will analyze the overall optician retail sector, examine the current competitive situation and look upon which market characteristics are considered to influence the optician retail brands and the dynamics within the sector. Finally, the market analysis will include an audit of the different optician retail brands' marketing mix, the applied positioning strategies and obtained positions.

Next we will conduct an empiric analysis where we will examine the importance of the five selected store image attributes from the literature review and also seek to gain an insight of the participants' perceptions and associations of the optician retail brands. Finally, the consumer analysis will contain an examination of which brand personalities are linked to the different brands, and how the optician retail brands are compared to each other, in regard to the different store image attributes.

After the completion of the empiric analysis, we will look upon the theoretical positioning strategies and make a comparison to our findings in the analyses to build an understanding of which attractive retail brand positions are obtainable and sustainable in the optician market. The insights and results from the market and consumer analyses will therefore be utilized to look upon, how the optician retail brands can use the store image attributes in a positioning strategy based on the current situation in the optician retail sector.

Finally we will use the results of our analyses to examine how Thiele can create a differentiated store image and to identify which attractive position Thiele is recommended to obtain. The last section will moreover look upon which positioning strategies Thiele should pursue in order to obtain the suggested position, and also treat what needs to be implemented and tactical executed by Thiele to succeed in obtaining an attractive position.

Figure 1: Thesis Structure



Source: Own construct

8. Theoretical and Empirical Approach

In this section, we will present which theories and approaches we have chosen to apply to answer our problem statement. The thesis is as described above structured on the basis of the four research questions, which need to be answered in continuation of each other and since they all will be approached differently, we will now describe the different sections and analyses separately.

8.1 The Market Analysis

The market analysis will be conducted through desk research and will only be based on secondary literature from different sources. The information gathered to create an understanding of the overall optician retail sector is retrieved from different industry homepages such as the Danish Optician Association, which has 530 optician stores as members out of a total of 650[94]. Furthermore, information is gathered through news sites such as Borsen.dk and Business.dk. Both the Danish Optician Association and the news sites are considered as reliable sources, though we should be aware of the overall topic in every article and try to see through the agenda behind the published.

In addition to the desk research, we have received some information from our contact at Thiele; Frederik Brandt, who is the Marketing and PR director. He has given information and input regarding some particular market characteristics and expected future trends. Even though it is in his best interest to give reliable and trustworthy information, it is considered very unlikely that Frederik can be fully objective concerning the industry, and several statements have therefore not been taken too literally or been considered as facts.

The market analysis will moreover aim to create an understanding of the different optician retail brands' marketing mix and how they can be characterized. To be able to conduct this part of the analysis, we have gathered information through the different optician retailers' website and also the venture capital firm's, which in several cases own the optician retail

[94] Rechnagel, U. T: Nyt Syn vil udfordre optikerrivaler. Børsen 15th Marts 2010

brands. In connection to retrieving information about the competitive situation in the market, we will use TNS Gallup's analytic tool Gallup PC to create tables concerning consumers' awareness levels and intention to visit etc.. Moreover, Adfacts from TNS Gallup will be used to draw data about the media spend in the sector. TNS Gallup is Denmark's biggest analytical company and is known for its competences within market research and information[95]. TNS Gallup applies highly approved methods to gather its information and is a specialist in regard of recruiting respondents, meet the requirements of sample size, avoiding bias etc., and therefore we have no reason to question the validity or reliability of the data from TNS Gallup. It could though be problematic, if we understate or exaggerate the output from Gallup PC or if we in general interpret the data incorrectly. We will therefore discuss every map and table employed in the analysis carefully, to be sure that we comprehend the same information.

8.2 The Consumer Analysis

In this section, we want to present which methods and approaches that will be applied in order to collect data in the consumer analysis. In the literature, we have only been able to obtain a general overview of which retail store image attributes that are important and are to influence the store image.

Our consumer analysis will be based on a qualitative research in which we want to conduct two focus groups. This method makes it possible to analyze and get an insight of why two homogenous groups choose between optician retail brands the way they do and the considerations connected to this decision[96]. Thus, we can analyze which specific choice criteria the participants have, and how the criteria influence the decision process when choosing one particular optician brand. Finally, we are able to examine what characterize a satisfactory optician experience and not least how the participants perceive the optician retail brands[97].

As we want to know which attributes are the most important in building a retailer's image in the optician sector, we want a deeper understanding of the five attributes found in our

[95] http://tns-gallup.dk/om-tns-gallup.aspx
[96] Krueger, Richard A.; Casey, Mary Anne. (2009): Focus Groups – A practical guide for applied research. p. 7
[97] Krueger, Richard A.; Casey, Mary Anne. (2009): Focus Groups – A practical guide for applied research. p. 19

literature review. By conducting two focus groups, we will be able to discuss and evaluate if all the attributes are relevant like the literature claims and also create insights concerning the underlining elements within the attributes.

Next, we want to gain an insight of the participants' perceptions and associations of the five optician retail brands plus analyze which brand personalities the participants link to the different brands. Furthermore, we want to see how the participants place and compare the optician retail brands in terms of price, service and quality, which all are considered to be determent when choosing an optician retailer. This will be achieved by applying the tool 'perceptual map'. Gaining an insight of these areas is essential, when we in the thesis are to discuss which attractive retail brand positions are obtainable and sustainable in the optician market, and how Thiele can differentiate its store image and create an attractive position given the market situation.

The Advantages and Disadvantages of conducting Focus Groups

In the thesis, the conduction of focus groups is chosen as semi-structured interview techniques give the opportunity to first of all focus on *why* consumers behave as they do, and not only *what* consumers' behavior is. An advantage of conducting a focus group is the creation of a dynamic atmosphere between the participants, which can lead to a varied and clarified illustration of the subject. Furthermore, we have the opportunity to interact with the participants, pose follow-up questions or ask questions that probe more deeply. Finally, in terms of time resources we consider this method possible, as the information is provided more quickly compared to other surveys[98].

However, there are some important disadvantages of this method[99], which we need to be aware of. First of all, the number of focus group members is not large enough to be a representative sample of a population; thus, the data obtained from the groups is not representative in regard of generalizing the findings to all consumers. Another fundamental difficulty with focus groups is the issue of observer dependency, as the moderator is always a

[98] Halkier, Bente (2002): Fokusgrupper p. 16
[99] Halkier, Bente (2002) Fokusgrupper p. 17

participant, which decreases the ability to note all reactions in the group[100]. By having one of us taking the role as moderator and one as observer, we will try to decrease this risk. Moreover, there will always be a risk that the participants are not feeling comfortable due to the lack of anonymity. The short introduction of each participant combined with the information about why they are gathered and the purpose of our interviews should enhance a feeling of belonging to the group and make them feel comfortable in the situation. By creating a relaxed atmosphere, the chances of everybody talking and discussing openly will be increased. Finally, some participants might feel a pressure to give a certain answer to please the moderator and is therefore not giving a honest answer. By underlining that there are no wrong answers and asking questions in a neutral way, we will try to reduce this risk.

Validity

When conducting a focus group, the question of validity always remains. In the thesis, we aim to achieve an alignment between our theoretical focus seen in the literature review and our empirical data from our consumer analysis. In general, we need to remain open to new insight and avoid being dazzled of our own idea of the reality.

Validity also means that the empirical data from the consumer analysis needs to be relevant for answering our problem statement[101]. In the focus group interview, we want to use the studied theory of the five store image attributes as the focal point. Since we cannot answer our problem statement without knowing, which attributes are the most important in the mind of the consumers and how consumers perceive the optician retail brands compared to each other, we consider this consumer analysis to have a high validity to our thesis.

Reliability

High validity does not necessarily secure high reliability. Hence, it does not help to measure the right area (validity), if we do not measure it the right way, which is why we need to take reliability into consideration as well. Reliability is the consistency of our measurement, or the degree to which our method of conducting focus groups measures the same each time it is used under the same conditions with the same subjects. In short, it is the repeatability of our

[100] Tjaco H. Walvis (2003) "Avoiding advertising research disaster: Advertising and the uncertainty principle"
[101] Andersen, Ib: (2008): Den Skinbarlige virkelighed. p. 83

measurement. This means that a similar methodology will make it possible to reproduce the same results and measure the same each time the analysis is repeated.

To secure reliability, we will describe every step of the process of conducting our focus groups, including the documentation of the used procedure of recruitment, development of questionnaire and transcription of the interviews afterwards. The low amount of participants will though make reliability an issue, which we need to take into account.

8.3 The Process of conducting Focus Groups

Our process[102] of conducting the focus groups will be divided into the following areas: 1) Selection of Participants 2) Recruitment of Participants 3) Preparing the Questionnaire 4) Practical preparations and 5) Typing the interview. The results of the focus groups interviews will be presented and analyzed in section 10.0 Consumer Analysis.

8.3.1 Selection of Participants

The focus groups will be conducted two times with two different groups of people. One focus group will involve participants between the age of 20 – 40, and another with people above 40. One of our recruitment criteria is therefore the age of the participants, and the two groups will be gathered to be homogenous in regard to the age. This is chosen since we, as described in the section concerning assumptions, expect the consumers' experiences to have influence on their attitudes towards the attributes and perceptions of the different optician retail brands.

Additionally, we want to be sure that all the participants have at least some optician retailer experiences and relevant perceptions, wherefore we will only strive to invite consumers with a need of at least reading glasses and who have been visiting a optician retailer within the last year. These criteria enhances the potential for having some good and varied discussions in the groups and is also chosen to ensure that no participants will feel that they cannot contribute or give inadequate inputs.

[102] Krueger, Richard A.; Casey, Mary Anne. (2009): Focus Groups – A practical guide for applied research. p. 17

Our recruitment will not be based on any other criteria since we want to maintain the broad perspective. Furthermore, we were not able to find any evident difference between the consumers' awareness and use of the different optician retail brands, when we separated the respondents in the survey from TNS Gallup geographically between east and west of Denmark[103]. This lack of difference made us confident that there is no reason to recruit participants from different areas of Denmark or conduct several focus groups in both Jutland and on Zealand.

8.3.2 Recruitment of the Participants

The recruitment of the needed participants is made by sending out a written invitation, which contains a short introduction of us as students on CBS, an explanation of why the participant's help is needed and also all the necessary practical information[104]. In the invitation, we are only writing that the focus group concerns the optician retail sector, which is absolutely on purpose. There are no further details about optician retail brands or sub-subjects, since it is important that the participants do not make any specific thoughts or observations before coming to the session. Because we want to examine the participants' perceptions of the optician retail sector and try to get information about the consumers' decision making and their experiences with the optician retailers, our interviews require that the participants do not acquaint themselves with specific information that can influence their memory, immediate thoughts or attitudes.

8.3.3 Planning the Questionnaire

The focus group interviews will consist of two parts: the general and broad discussion and the exercises with perceptual maps. For the general and broad discussion, we have planned a questionnaire that can guide us with sub-subjects and questions throughout the interview[105]. The questionnaire is designed with open questions in order to make the participants answer with their own words and thereby create open discussions. To gather as much information as possible and to make the participants prioritize the store image attributes and evaluate the

[103] See Appendix 3: Awareness and Considerations to visit the Optician Retailers - East vs. West
[104] See Appendix 4: Invitation to participate in Focus Group Interview
[105] See Appendix 5: Questionnaire – Focus Group Interview

optician retail brands as planed, we will moreover handout 2 additional small questionnaires[106].

A third questionnaire concerns brand personalities, and it consists of a list with 50 different brand characteristic words. As we in the thesis use Aakers' theory of brand personality the majority of the words are derived from Aakers 5 personality traits, as touched upon earlier in the thesis. Since Aakers' brand characteristics are not designed to the retail sector, we think that some characteristics are missing. Therefore, we have added words like quality- and detail oriented, innovative, cheap, discount, professional, experience, technical and accommodating[107].

The focus groups interviews also include exercises in which the participants will have to make perceptual maps. The exercise requires the participants to place the five optician retail brands on maps that have price vs. quality and price vs. service on the axis. The objective of this exercise is to see, how the participants perceive and place the optician retail brands and make them discuss the different brands while placing them on the maps. Furthermore, the results of the different exercises will make us able to compare them to the perceptual maps we have drawn from TNS Gallup.

8.3.4 Practical Preparations

We will use a dictaphone to record the interviews, which makes it possible for the moderator only to focus upon the interview and eliminate the need of taking notes regularly. The dictaphone also captures every small statements and comments, which can easily be overheard and not noted, if and when several participants talk at the same time. As we both will be present during the interviews, the one not being the moderator will be responsible for filling out a register paper and fill out what each person says. Hereby we secure that the information will not be lost by eventual technical problems plus make it possible to register observations concerning the participants' body language e.g. nod by agreement. Before the interview starts, the participants will be informed that it will be recorded for documentation.

[106] See Appendix 6: Prioritizing the 5 attributes + Appendix 7: Evaluation of the Optician Retailers
[107] See Appendix 8: Brand Characteristics – Handout

The holding of the interviews will take place in April in a loaned office space in the center of Copenhagen. There will be one table where the main part of the interview will go on and next to this, we will have a separate table for the exercise of perceptual maps. Hereby, all the participants can stand and be involved in placing the brands in the respective maps. The setting will be made cozier and more relaxed then a normal meeting room by adding some refreshments and soften the lightening. The company, which normally uses the office, will furthermore remove their posters, diagrams and other charts from the walls to eliminate distractions.

8.3.5 Typing the Interview

Before we are able to analyze the results, we need to transcribe the interviews to text. This transcription does have some uncertainties linked that we need to be aware of in order to secure reliability[108]. E.g. it might be difficult to understand what exactly the participants mean by one statement or maybe the participants will talk at the same time, and it can be difficult to catch the exact phrases.

To secure reliability, we will both transcribe the text and afterwards compile the information so it can be applied in the analysis[109]. We have chosen to transcribe the interview in Danish, so we can have the exact original words and statements from the participants. In addition, all information concerning the conduction of the focus group interviews are included in either the thesis or appendix so that it is made possible to compare the results by repetition of the same data collection.

8.4 Positioning

The theories of positioning strategies will be the underlying basis of our positioning paragraph and it will be examined in section 11.0 Positioning Strategies and attractive

[108] Kvale, Steiner (1996) Interviews – An introduction to qualitative research interviewing p. 163
[109] See Appendix 9: Transcription of Focus Group 1: 20.04.2010 + Appendix 10: Transcription of Focus Group 2: 22.04.2010

Optician Retail Brand Positions. In addition to the theory, we want to use data of both quantitative and qualitative research methods.

The quantitative data will be conducted from TNS Gallup's analytic tool Gallup PC, by which we have drawn one map of how the optician retail brands are placed in reference to the variables of price versus quality. As mentioned earlier, TNS Gallup is Denmark's biggest analytical company and is known for its competences within market research and information[110], and because of TNS Gallup's highly approved methods to gather information, we consider the data valid and reliable.

The qualitative data will be conducted trough the exercise of perceptual maps from each focus groups interview. As mentioned earlier, the participants will have to place the different optician retail brands based on the axis: price vs. quality and price vs. service.

The insight from our qualitative data and the gained knowledge of positioning strategies are essential for our discussion of which attractive retail brand positions are obtainable and sustainable in the optician market, and how Thiele can create an attractive position given the market situation.

8.5 Thiele

In this section, we will analyze how Thiele can differentiate its store image and create an attractive position. This analysis will be based on our findings from the earlier analyses and also by applying different analytic tools.

As we in this section are to discuss which attractive position Thiele should obtain, we find it relevant to touch upon Thiele's future target group. For this, we will use 'GallupKompas'[111] to put forward some considerations in regard to selecting a target group and thereby describe which consumers Thiele should target. GallupKompas is a segmentation tool that based on attitude questions gives a nuanced insight into consumers' believes, values and lifestyles, and it is a tool that classifies the Danish population into 9 homogenous groups[112].

[110] http://tns-gallup.dk/om-tns-gallup.aspx
[111] http://www.berg-marketing.dk/livsstils_segm.htm
[112] http://www.berg-marketing.dk/livsstils_segm.htm

Moreover, in this chapter we will discuss which positioning strategy Thiele should employ to obtain the recommended position. This discussion will be based on our considerations from the previous chapter concerning positioning strategies.

In addition, Aaker's theories of brand personality will be applied in an analysis of how Thiele should build a relevant brand personality, which matches the recommended position. In our final discussion of what needs to be implemented and tactical executed to actualize the recommended position, we will apply different general brand management theories and use our findings from the market and consumer analyses to differentiate the store image. Furthermore, we will use best practise cases from other retail sectors or industries to illustrate some specific areas of improvement, which Thiele is recommended to focus on to deliver a satisfactory store experience that is aligned with the suggested position.

9. Market Analysis

In the following section, we will analyze the current competitive situation in the optician retail sector and thereby present some different market factors, which are considered to have influence on the existing optician retailers. Moreover, we will analyze the different optician retail brands separately and seek to draw attention upon some characteristics or applied marketing parameters, which are considered to influence the competitive situation and the different current positions that the optician retail brands seem to obtain. To create an understanding of the current competitiveness and performance of the different brands, the brands will be analyzed in regard to turnover, awareness levels, customer base and share of voice.

9.1 The Optician Retail Sector

The sector first of all consists of a mix of established chains, some optional chains and small independent opticians and currently there are around 650 optician stores in total in Denmark, which offer optician services, have glasses as part of their assortment and have authorised personnel[113]. The entire optician retail sector turned over more than 3.7 billion DKK in 2009, which means that an optician store on average has a turnover on about 6 million DKK per year[114].

[113] Rechnagel, U. T: Nyt Syn vil udfordre optikerrivaler. Børsen 15th Marts 2010
[114] Retail institute Scandinavia (2010): "Kæder i Dansk detailhandel 2010" - Table 88

The established chains are Louis Nielsen, Profil Optik, Synoptik and Thiele and together they cover about three quarters of the sector in regard to turnover, and can thereby be said to be the leading and influential players in the market. The optional chains are Nyt Syn, Opto Gruppen and Vision, where Nyt Syn are marketed and operating with the same store name all over Denmark and thus the only optional chain, which can be said to have a national optician retail brand.

All the operating optician retailers, regardless of their chain structure status, seem to apply more or less the same business concept and offer a similar mix of optician services, eye examinations, glasses, sunglasses and contact lenses. Since the sector has been existing for decades, the sector can moreover be characterized as being in a mature state, where especially price has, as often seen, become the main marketing parameter and the most commonly used competitive move. In this regard, there are no doubt that the business concept introduced by Louis Nielsen and the acquisition made by Specsavers in 2005, has had great influence on the market and the current focus on price as the main parameter. Almost all the current optician retail brands reacted and followed Louis Nielsen's price orientation in their counter-strategy to meet the new competition and retain their customer base.

Everyday the optician retailers are communicating new promotions or discounts and are trying to lure consumers to enter their store with for instance 2 for 1 offers or instalment payments. In fact, it is now more common than rare that a consumer can get a free eye examination and by glasses with zero payout for several months.

The fierce price competition and the distortion in the market power, caused by Louis Nielsen's aggressive expansion and the following reinforcement hereof with Specsavers' capital contribution, have resulted in an unseen need for capital. To survive in the sector, economy of scale can be argued to have become essential. During the last decade, some of the chains have consequently been sold to large international corporations or entered strategic alliances with foreign optician companies. Synoptik was the first optician retail brand, which changed hands back in 2004 and is today owned by the international optician retailer Pearl Europe, whereas Louis Nielsen as mentioned was bought up by another international optician retailer, Specsavers in 2005[115]. Nyt Syn and Profil Optik have each entered alliances, and 120 optional opticians from Profil Optik chose to be acquired by Synsam Nordic in 2007[116].

Thiele is thereby the only larger chain in Denmark, which has not made alliances or been acquired by an international corporation. In 2005, Thiele changed hands when the Danish rich man Jens Henrik Brandt bought 95 % of the company and Profil Optik the remaining 5 %[117]. This development of acquisitions and alliances in the sector has not only intensified the price competition, but also put a pressure on the optician retail brands to be more focused on the profitability of each store and open new stores wherever the market potential is considered to be adequate.

The optician retail sector is moreover influenced by a special circumstance in connection to purchasing frames from the different merchandisers and fashion houses. This is due to the fact that only four international licensees hold and share the rights for the most sought-after designers such as Gucci, Prada, Burberry, Dior, Armani, Hugo Boss etc[118]. Thus, the need for having great buying power is vital to stay cost-competitive and be able to negotiate a settlement with low prices, but is also important to be approved by the licensees and by this, continue to offer the demanded designer merchandises.

Another characteristic, which is also believed to exist in the sector, is the increasing amount of money spent on advertising. The fierce competition and the need for communicating the endless promotions and discounts are considered to have resulted in escalating marketing budgets among the biggest brands[119]. Almost every optician retail brand is today seen as a rather heavy media buyer and since all the optician retailers have increased their media presence, a vicious circle can be said to have begun. It is thereby even more difficult to stand out and be noticed. Figures drawn from Adfact via Gallup PC show that from January 2009 to May 2010 the total media spend of off-line media was 184 million DKK and the five national

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115 http://www.cisionwire.dk/louis-nielsen/partnerskaber-skaber-100-nye-job-hos-louis-nielsen-i-2009 + http://www.pearle-europe.com/

116 Rechnagel, U. T: Nyt Syn vil udfordre optikerrivaler. Børsen 15th Marts 2010 + http://www.profiloptik.dk/Default.aspx?ID=195

117 http://www.business.dk/diverse/thiele-bliver-paa-danske-haender

118 Discussed with Frederik Brandt, Thiele's Marketing and PR Director

119 http://tv2mediaforum.dk/indhold/en-offensiv-strategi-hjalp-synoptik

brands covered 78 % of that amount[120]. All media is moreover seen to be brought into play and no holds seem to be barred, when it comes to getting consumers' attention.

9.2 Trends

One evident emerging trend is the intensified competition from foreign optician retailers and online shops[121]. Offering glasses and frames online have made it easy for foreign optician retail brands and small importers to be available and enter the Danish market. Moreover, it is more and more common that consumers choose to buy glasses or at least frames, when they are travelling abroad. The Internet is full of guidance and tips on how consumers can save money on glasses abroad. In fact, the travel agency MyTravel recommends a certain optician retailer if consumers travel to Thailand[122]. Since even our neighbouring countries can offer cheaper glasses, they seem to be the most preferred option and most discussed on the Internet. Some Swedish optician retail brands actually take advantage of the price difference and try to convince the Danish consumers to visit the stores and buy its glasses by speaking and writing in Danish. Optica has for instance this statement in Danish on the website: "It is significantly cheaper to buy your glasses at our store in Sweden. We have several Danish brands like Lindberg and Bellinger. We understand the Danish language very well, which means that you as a customer will feel safe during the eye examination.[123]"

In addition, it has become possible to get an eye operation, which improves one's sharpness of vision and eliminates the need for using glasses or contact lenses. Even though this procedure is still expensive and not very widespread, it could eventually influence the optician retail sector and diminish the total market potential - especially in regard to the high-end target groups. As an example, Godt Syn is now offering operations between 15.000-40.000 DKK with zero payments for several months. Godt Syn convincingly communicates,

[120] See Appendix 11: Media spend in the Optician Retail Sector in 2009 - 2010
[121] See: http://www.netbriller.com/, http://www.e-briller.dk/, http://www.brille-outlet.dk/, http://www.lensway.dk/briller etc.
[122]http://www.mytravel.dk/travelguide/travelGuideMain.aspx?&categoryid=1&travelguideid=41166&chapterid
[123] http://www.optica.se/danmark.html

how fast the costs of the surgical procedure are break even compared to having contact lenses or buying glasses every second year[124].

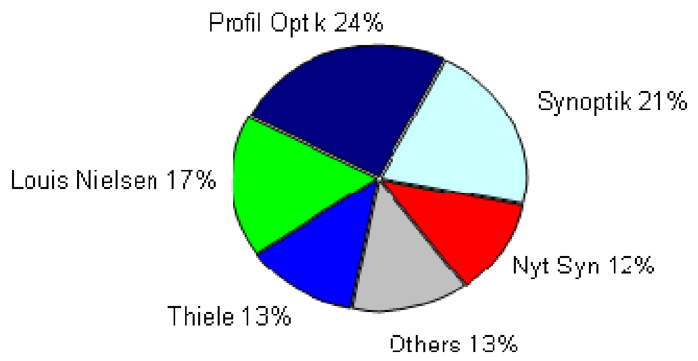
One trend, which the traditional optician retail brands can be happy about, is the fashion trend of having glasses for every look, style and personality. More and more fashion houses have glasses within their assortment of accessories and show of their new collection as part of the looks on the runways. Having a special pair of fashionable glasses has become part of how consumers can show their personal style. Several fashion magazines are moreover starting to characterize glasses as an important accessory with high signalling effect[125]. As a consequence, a growing number of consumers actually buy glasses or rather frames and get clear glass installed. Furthermore, it could be argued that another effect of this trend could be that some fashion oriented consumers might feel tempted to buy glasses more often or even have several pairs at once.

9.3 The Optician Retail Brands

Our analysis of the different optician retail brands will only involve the 5 biggest brands, since they are the only once marketed under the same name across the country. They are the only brands, which are possible to get information about in regard to awareness level, yearly turnover etc. Moreover the following 5 brands are the only ones, which can be said to have an actual national position in the optician retail market and thereby the only retail brands of interest to this thesis. The current competitive situation and the size of the different players can be seen by the chart below, in which each market share is presented in regard to the brands' turnover in 2009[126]:

124 http://godtsyn.dk/index.php?option=com_pricelist&Itemid=17&menuItem=6
125 http://www.oestrogen.dk/Mode/Accessories/16650.aspx + http://www.divaonadollar.com/2008/05/new-must-have-accessory-glasses.html + http://www.modebriller.com/fede-brillestel-vera-wang.html + http://www.euroman.dk/galleri/the-glasses/
126 Retail institute Scandinavia (2010): "Kæder i Dansk detailhandel 2010"

Figure 2: Market Shares of the 5 Optician Retail Brands in 2009



Source: Own construct based on figures from Retail Institute Scandinavia

9.3.1 Louis Nielsen

Louis Nielsen is by far the optician retail brand, which has been able to take the most differentiated position in the market. The low-end position is achieved through consistent communication of the concept with cheap glasses, which are always classified within certain price levels, starting from only 195 DKK[127]. Louis Nielsen is not only branding them self differently, but build upon a different business model, which gives the brand the ability to be price competitive with satisfactory margins and high credibility towards the consumers. The difference with Louis Nielsen is that the brand shows an entire new way of doing business and appears very convincing in regard of passing on the gains of economy of scale advantages to the end-user. The brand has experienced great growth over the years and has almost doubled the amount of stores and yearly turnover, as it has evolved from having 32 stores and a turnover of 363 million DKK in 2005 to have 61 stores and a yearly turnover of 653 million DKK in 2009[128].

[127] http://www.louisnielsen.dk/briller/prisguide/
[128] Retail institute Scandinavia (2010): "Kæder i Dansk detailhandel 2010"

Louis Nielsen is besides one of the most recognized brands with an awareness level among both 20-40 and 40+ year old consumers of 98 % and 84 % respectively. Especially the younger consumers seem attracted by Louis Nielsen since 31 % usually or occasionally visit the stores whereas only 16 % of the 40+ usually or from time to time do visit Louis Nielsen. In total, Louis Nielsen's customer base can be said to consist of more than 510.000 Danish consumers and since the 40+ segment is proportionally comprehensive it accounts for 340.000 Danes[129].

The high level of awareness is not achieved without cost as can be seen in Appendix 11. Louis Nielsen has for instance been the far greatest media buyer in 2009-2010 with 86 million DKK, which accounts for 47 % among the 5 national brands. Louis Nielsen is by far the heaviest buyer within all the different traditional media such as TV, radio, print, and outdoor and has moreover started to deliver the brand messages trough commercials in the movie theatres.

Being low priced is though not the only attribute, which Louis Nielsen is competing on and wants to be associated with. Recently, the brand is communicating that it delivers professional service, quality and has fashionable frames and designs within the assortment. In fact, Louis Nielsen is currently running a campaign for "The Spectacle Wearer of the Year", which is all about being trendy, having personal style and showing of a great look and attitude while wearing glasses[130]. The campaign is created and communicated as a competition, which ask consumers to upload pictures of their look on to a special designed sub-site, where the visitors than can vote for their favourite. The campaign is made very credible through partnerships with different media, such as the fashion magazines Euroman and Eurowoman, where glasses were reviewed by journalists and thereby appeared as branded content. During the fashion week in Copenhagen August 2010, the brand appeared on television with a finale selection of this year Danish winner of the competition. The small advertising funded program had a rather famous host; Marianne Dinesen, who is known for her knowledge of fashion and the shows were thereby all about being fashionable with Louis Nielsen's glasses[131].

[129] Appendix 1: Awareness of and using the different Optician Retailers
[130] http://brillelook.dk/
[131] http://brillelook.dk/ + http://www.tvnyt.com/artikel/default.asp?id=18623

9.3.2 Nyt Syn

Nyt Syn is unlike the other optician retail brands an optional chain, but this business structure is however very likely unknown by the consumers since every Nyt Syn store has the same façade, logo and store design all over the country. Additionally, all the storeowners of Nyt Syn have the same vision, which is; "We want to create the perfect vision experience together with our customers"[132]. Nyt Syn is in fact trying to exploit that the brand is not a commercialized and standardized concept chain as the others, by underlining in its communication that the brand has the ability to adjust to the demand in every local community. Nyt Syn communicates that it is the owner, who stands behind the desk and the independency furthermore makes the single optician owner able to offer a tailored assortment based on the daily customers' preferences[133].

Even though this communication and concept might sound reasonable and seem competitive in the sector, it is evident that Nyt Syn is having difficulties standing out. During the last 5 years the chain has decreased in the amount of stores from 85 to 69. The brand has however experienced growth in the remaining stores, where sales have grown from 379 million DKK to 451 million DKK[134]. It seems as though Nyt Syn has difficulties in keeping a satisfactory level of awareness and in remaining relevant in the eyes of the consumers. Nyt Syn has the lowest awareness level with 84 % among the 20-40 year old and 68 % among 40+ year old. In addition, Nyt Syn seems to have the smallest customer base of about 72.000 20-40 year olds and 279.000 40+ year olds, which correspond to only 13 and 12 % respectively[135].

To stay competitive in the intensified fight for market shares, Nyt Syn has tried to create a position as a responsible optician retail brand, which is concerned about international issues. Nyt Syn is considered to be focusing on communication related to other factors than outperforming the competitors in regard to the attributes such as service, price or assortment. As seen in many other sectors, Nyt Syn has alternatively started to communicate and show corporate social responsibility. The effort is about "Glasses for Africa", which is an initiative,

[132] http://nytsyn.dk/Om-Nyt-Syn.aspx?ID=44
[133] http://nytsyn.dk/Om-Nyt-Syn.aspx?ID=44
[134] Retail institute Scandinavia (2010): "Kæder i Dansk detailhandel 2010"
[135] See Appendix 1: Awareness of and using the different Optician Retailers

where consumers can contribute by giving their old glasses to Nyt Syn, which then will ship them to Africa[136]. Employees at Nyt Syn are voluntarily travelling to countries like Senegal to conduct eye examinations and donate the right pair of glasses to poor African people. The campaign is made to communicate that Nyt Syn makes a difference, and Nyt Syn is thereby trying to give consumers a new incentive to choose the brand[137].

Whether or not this initiative is successful or will be in the future is hard to tell, since the campaign was launched recently, but it must be stated that the initiative certainly has received much attention and created a lot of PR buzz[138]. On the other hand, it does not seem as though Nyt Syn has the budget to create adequate awareness and knowledge about the brand's cause. During the last 18 months Nyt Syn has only bought TV exposure for 4 million DKK and in total only spend 5.7 million DKK on traditional media[139]. It is possible that Nyt Syn prefers communicating through other media channels such as online and through social media networks. However, the low purchase still indicates a rather small budget, since a TV ad is actually produced and probably would have been aired more if the capital needed was at disposal.

9.3.3 Profil Optik

Profil Optik is currently the market leader with 139 stores across the country and a turnover of 937 DKK million in 2009, corresponding to a market share of 24 %[140]. Profil Optik has experienced a tremendous development from being gathered by 25 independent optician store owners in 1971 to be a full grown conceptual chain in 2009. Profil Optik presents the brand as being in the market for service, quality and fashion and to be running by the concept "An eye for who you are". Moreover Profil Optik states that it focuses on middle-/high-end consumers and thereby signals that Profil Optik is not part of the price war. However, it is noticeable that price is obviously displayed in the majority of the façade windows of the stores and moreover price and promotions is the first thing to see, when visiting www.profiloptik.dk. On the front page of the website a commercial for a promotion is automatically started, telling that if you

136 http://www.nytsyn.dk/Briller-til-Afrika.aspx?ID=318
137 http://www.youtube.com/watch?v=ERgKVc2n4WE + http://www.facebook.com/home.php#!/NytSynBrillerTilAfrika
138 http://www.soendag.dk/Artikler/Artikler/Giv_dine_briller_til_afrika.aspx + http://www.bureaubiz.dk/composite-2371.htm http://stiften.dk/article/20090924/AAS_AARHUS/707390989 + http://favrskov.lokalavisen.dk/article/20081211/ARTIKLER/585045843/1489
139 See Appendix 11: Media spend in the Optician Retail Sector in 2009 - 2010
140 Retail institute Scandinavia (2010): "Kæder i Dansk detailhandel 2010"

buy a pair of glasses, you get a pair of sunglasses for free. In general, Profil Optik is considered to be an optician retail brand, which is competing to outperform the other players in regard to especially service and assortment, but also by having high availability, by the means of many stores. In connection to price, it is not likely that Profil Optik will enter the price war with Louis Nielsen, nevertheless it is considered as very possible that Profil Optik wishes to be competitive on price when comparing them self to Thiele and Synoptik.

When looking closer at Profil Optik's current situation, 98 % of the 20-40 year old are aware of the optician brand and 17 % or about 96.000 often or occasionally visit the stores. The same awareness is though not achieved among the 40+ year old, in which the brand has an awareness level of 87 %, while 23 % or 394.000 are visitors at the stores[141]. Both Louis Nielsen and Synoptik actually have greater customer bases, which indicates that Profil Optik must be more successful in getting a larger share of the store visitors to buy something or getting more money out of the ones, who choose to purchase at the stores.

The present situation is considered achieved through the brand's rather long history of having the greatest penetration and through consistently communicating the wide offering of designer frames and professional service. The messages are delivered through print advertisements and TV-commercials. In total, Profil Optik has spend more than 30 million DKK on media exposure and shown a great preference for TV, since it accounts for more than 80 %. When comparing the total media budget to the other brands, Profil Optik lacks behind Louis Nielsen and Synoptik but is spending a lot more than Thiele and Nyt Syn.

9.3.4 Synoptik

Synoptik seems to be the one optician retail brand, which has chosen to meet the price competition head on with Louis Nielsen and therefore continuously run campaigns with price as the main message. Few years ago, a discount based on one's age was introduced and Synoptik has moreover decided to introduce a fair priced private label; Robert D., named after

[141] See Appendix 1: Awareness of and using the different Optician Retailers

the founder of the company[142]. Synoptik seems to be the second heaviest media buyer after Louis Nielsen, since more than 23 % of the traditional media spend in 2009-2010 was made by the brand, and Synoptik was evidently especially running TV-campaigns[143].

The high media spend and the discounts and communication hereof seem to pay of in connection to awareness and whether the consumers consider Synoptik as worth a visit[144]. This can be said since 99 % of the 20-40 and 89 % of the 40 year olds are aware of Synoptik. Furthermore, 28 % and 33 % of the age groups respectively visit a Synoptik store often or once a while[145]. These figures cover the greatest customer base in the sector of more than 874.000 consumers, however it is noteworthy that more than 650.000 consumers have answered that they used to visit Synoptik, but do not any more.

Even though Synoptik has been bought up by Pearl Europe and thereby has the capital to meet the intensified competition with strong means, the strategy applied does not seem to be working satisfactory[146]. This is in view of the fact that Synoptik in addition to the decrease of its customer base also has lost 6 % - point of the market share from 2005 and 2009 and lost its position as market leader to Profil Optik[147]. We assume it could be possible that a majority of the growth experienced at Louis Nielsen comes from stealing or persuading earlier customers at Synoptik to try Louis Nielsen instead. It is assumed that Synoptik has thereby experienced some sort of a customer flight among the most price-sensitive segments.

Another reason for the decline could be that Synoptik seems to be one of the brands, which seeks to please every consumer in regard to all attributes. Besides being heavily present in the media and having a price focus, Synoptik is also communicating that the brand is service and fashion oriented. Dennis Knudsen, who is a rather famous hair and makeup stylist, was used as an endorser and spokes person to communicate fashion and personal style, when choosing the right pair of glasses. Synoptik communicates that the stores have trendy frames on the shelves, and that the employees put an effort into and have the qualifications to help the

[142] http://www.synoptik.dk/briller/kampagner/robert-d-fra-1499-kr
[143] See Appendix 1: Media spend in the Optician Retail Sector in 2009 - 2010
[144] http://tv2mediaforum.dk/indhold/en-offensiv-strategi-hjalp-synoptik
[145] See Appendix 1: Awareness of and using the different Optician Retailers
[146] http://www.business.dk/diverse/synoptik-har-gang-i-svingdoeren
[147] Retail institute Scandinavia (2010): ”Kæder i Dansk detailhandel 2010”

consumers choosing the right pair of glasses. All in all Synoptik is one of the best performing optician retail brands in the sector with a turnover of more than 777 DKK million in 2009[148]. However trying to be everything to everybody is considered to be a dangerous strategy that could end up making consumers confused about the brand.

9.3.5 Thiele

Thiele can to some degree be said to be in the same situation as described above with Synoptik and apply the same 'everything for everybody' strategy. First of all, Thiele has introduced 'Thiele Basic Eye', which is a low-priced collection that is considered introduced to meet the competition in regard of price[149]. The collection is seen as an attempt to attract the same consumers, who are the target for Louis Nielsen and Synoptik's Robert D collections, and price-sensitive segments in general. Moreover, Thiele communicates that the brand delivers top performing services and has a wide range of fashion designers within the assortment and thereby closely competes with Profil Optik. Thiele and Profil Optik can both be said to be competing on the different standard attributes and are furthermore mainly targeting the middle and high-end segments.

Given Thiele's ownership status and the fact that the brand has not experienced a similar cash injection as several of the other players, the brand has insufficient resources to increase the marketing budgets as otherwise seen in the sector. Thiele is therefore believed to have difficulties in cutting through to the crowd. Thiele is especially communicating through outdoor banners and in magazines or other print media and is spending a lot of money on having the right faces and names in the advertisements. In the recent years, Thiele has had famous people such as Helena Christensen, Ghita Nørby, Michael Falch, Sofie Lassen-Kahlke and Tine Lund as endorsers[150]. As the budget is rather limited and a great deal must be spend on endorsers, Thiele is not considered to be able to buy enough exposures in the media.

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[148] Retail institute Scandinavia (2010): "Kæder i Dansk detailhandel 2010"
[149] http://www.thiele.dk/basic-eyewear/index.html
[150] http://www.billedbladet.dk/Kendte/Nyheder/2008/10/Ghita%20Noerby%20har%20tabt%20sig.aspx + http://www.falch.dk/falch/falch-nyhark2008.html#helena + http://www.billedbladet.dk/Kendte/Nyheder/2009/8/Tina%20Lund%20brugte%20formue%20paa%20solbriller.aspx + http://www.minreklame.dk/R%C3%B8dovre_Centrum/side/23/

E.g. Thiele did only account for 11 % of the total spend in 2009 – 2010, which hardly can be said to be adequately, when the market shares of 14 % are kept in mind[151].

In spite of a long history and rather high penetration, Thiele has a low awareness level compared to Synoptik and Profil Optik of only 94 % and 80 % among the 20-40 and 40+ year old. Likewise, a smaller part of the consumers either visit Thiele often or from time to time. In fact, only 13 % of the 20-40 year old and 15 % of the older consumers answered that they usually or sometimes visit Thiele, which are far less than the amount of consumers visiting Synoptik, Louis Nielsen and Profil Optik[152].

9.4 Part Conclusion

After having analyzed the optician retail sector, it can be concluded that the sector is in a mature state and that the competition is very intensive with especially a fierce focus on price. In the sector, 5 national brands were identified as being of relevance and interest for our thesis. The 5 brands, which were analyzed and will be implemented in our following consumer analysis, are: Louis Nielsen, Nyt Syn, Profil Optik, Synoptik and Thiele.

Through the analysis, it has become evident that all brands have implemented very similar business concepts and thereby more or less offer the same combination of services and products to the consumers. Our assumption in the problem statement concerning the characterization of the sector can thereby be said to be true.

Only Louis Nielsen is identified to apply another business model and to position the brand differently. This strategy is furthermore considered to be successful since the analysis showed that Louis Nielsen has experienced great growth from 2005 - 2009.

In addition to the brand offerings, the 5 brands also seem to apply the same parameters to attract the consumers. The attributes found in the literature review all seem to be applied in one way or another, and especially Profil Optik and Thiele seem to have convergent marketing mixes and be targeting the same middle-/high-end segments. In connection to the brands' current competitive situation, Louis Nielsen and Synoptik were found to be in the

[151] See Appendix 11: Media spend in the Optician Retail Sector in 2009 - 2010
[152] See Appendix 1: Awareness of and using the different Optician Retailers

lead with both high awareness levels and great customer bases. When the attention instead is pointed at the brands' turnover and their amount of stores, Profil Optik is the market leader ahead of Synoptik.

In general, the market shares can though be concluded to be very equally divided and when looking at the sector while leaving out Louis Nielsen, it can be said to be a sector characterized by having very comparable brands with similar marketing mixes and quite coincided positions.

10. Consumer Analysis

In this section, we want to present the results gained from our focus groups interviews. As one of our research questions is 'what are the most important attributes in building a retailer's image in the optician market?', we will start by analyzing the output of each attribute. We want to discuss the importance of the attributes from the participants' point of view and at the same time compare these results to the theories found in the literature review.

Afterwards, we will analyze the brand personalities of each optician retail brand. This analysis will be based on the participants' free brand associations, the paper of marked brand characteristics and a description of 'If Brand X was a person, how would you then describe that person?'

Finally, we want to make an analysis of how the optician retailers are evaluated and which positions they seem to uphold. This analysis will be based on the focus group interviews, exercises of perceptual maps and perceptual maps from TNS Gallup, in order to create a diversified discussion with an acceptable level of reliability.

10.1 Store Image Attributes

In this first paragraph, we will present the results of each store image attribute and thereby put forward which elements seem to be affecting and contained in the evaluation of each attribute, and how important the participants expressed the attributes to be in regard of their perceptions of an optician retailer image.

10.1.1 Service

As we saw in the literature review, the literature claims that the delivery of high service and service quality is one of the most important attributes affecting the store image and store choice. Excellent customer service keeps customers coming back to the same retailer.

Throughout both focus groups, service quickly appeared to be a crucial factor. When the participants at the beginning were asked to describe the necessary elements of having a good optician retailer experience and why they keep returning to the same store, service is the focal point. The majority mentioned service situations linked to sales service, which we pointed out in the literature review.

<u>Sales service</u>

The aspect of trust and confidence is extremely important and was mentioned a lot of times. As examples some participants said the following about service:

"It is build upon confidence, like going to the dentist or doctor, if you don't have confidence it doesn't work - I need to know that they are doing their best so I will have the right and proper solution."

"The personal aspect is important. Like one just said about the dentist and doctor, it is a matter of confidence and trust."

"It is important to have a good feeling of the optician. Given that it is an area you don't know much about, you don't know if what they are telling you is correct. If you do not trust and have faith in the person who stands there, then it is difficult I think. After all, it is a big amount of money to pay."

The last comment might explain why trust and confidence are important. Buying glasses requires professional expertise and guidance, as customers need to have their eyes checked in order to get the right strength in their glasses. Customers do not have any professional knowledge of this area, so they are forced to believe that what the optician tells and recommends must be true. Compared to many other service professions, this is an area where the customers cannot check if what the personnel are doing is correct. In continuation, one also mentioned that going to an optician retailer is like going to the doctor or dentist. You do not question the given diagnosis because you trust the person telling it to you. So when an optician tells a customer is in need of two pair of glasses because the fluent transition is important, the customer agrees and does it because he/she trusts the person.

One person also mentioned the word reliable and talked about it in regard to the selling aspect:

"It is important if they seem reliable. If they only want to sell you glasses because they only want to sell or if they actually want to help."

Other participants could agree to this. One mentioned that it is extremely important not to feel fobbed off with something and be in doubt of what the optician recommends is actually necessary or the right solution. Another one said that it is nice to have the feeling that it is you who takes the decision of buying and not the sales man saying: "This is the glasses you need and that's it."

Conversely, some participants found it nice to have advices, explanations and recommendations from the sales personnel. Both in terms of required professional expertise and fashionable guidance, which we also outlined in the literature review. One person said that it is important the optician actually shows an interest and ask several questions to find the optimal solution. Another one mentioned that it is satisfying, when the sales personnel are explanatory.

When the participants commented on the professional expertise and fashionable guidance, there were several reactions. One person said:

"I primarily think that the professional and technical expertise is the most important. That you get the right guidance so you can see perfectly. Off course, it is also important in terms of the frames but absolutely – the glass are most important. The other aspect is more individual and what your family and friends think."

Other participants found fashionable guidance important, and said that good service is also when the personnel are being honest about what fits ones face or not. Especially, if you go see the optician retailer alone and you have doubts. The sales personnel should guide the customers in all directions, even if what the person has to say is negative.

In the literature, we saw that sales service is linked to helpfulness, friendliness, and the competence of the employees. So far, the focus has been on the last element of competence but when visiting an optician retailer the other factors are important too. Some mentioned the attitude and behavior of the sales personnel and how much the personal connection means. Some of the participants talked about the significance of being service minded and having the personnel's full attention the moment they enter the shop. The aspect of time was also mentioned. It is important that the sales personnel have and take their time to fully serve the customers in every sense. As the literature claims, it seems as if sales service is a combination of all elements like one participant actually said:

"Good service is the combination of taking care of your customers and providing good expertise."

Store service

According to our literature review, store service is another important category of service. One element of store service is a good guarantee system, and when the participants were asked about service policies and guarantees, the majority agreed that it is standard and it is something that all optician retail brands have and should have. Some comments were:

"It is something you already expect."

"It is a matter of course. That is something you have had inculcated because they are all saying it to have customers."

In the literature review, we predicted to some extent these guarantees to be irrelevant to focus on as many consumers do expect these, because all the optician retail brands are offering it. In addition, we also questioned the aspect of mild guarantees and how they are never invoked, and for that reason we decided to ask the participants to give their point of view. In general, both groups expressed that it is something they expect and therefore it is not given much attention. One said that it would have been something else, if one optician retailer suddenly offered 10 years of full guarantee instead of the normal two years. So our view upon this aspect has not changed after the focus group interviews.

Online service

Finally, the participants were asked about the relevance and importance of online service. Generally, the majority has never visited a homepage from any optician retail brand to search for products, location of stores or book a new appointment and the participants do not find it important. For that reason, our further view of online service will be that it is of low importance.

If we shortly summarize service, we can see that sales service is mainly linked to the words trust, confidence and reliable in reference to the professional expertise. But good service is also about service-minded personnel who take their time to fully serve customers. The elements of store service are not crucial, as the participants believe it is a matter of course. And finally, online service is seen as the area of less importance. Overall, the importance of sales service is extremely high when the participants are to characterize a good store experience and talk about service in general. Looking at the result in Appendix 12, it actually shows that service is the most important attribute. The participants ranked the different attributes, by which 1 was given to the most important and 5 to the less important one. The majority sees service at the most important factor compared to the four other attributes, and the number 1 is given to service in most of the cases. Service has thereby scored 1,5 in the group 20-40 and 1,1 in the group 40+ and is the most important attribute of them all.

10.1.2 Price and Promotion

In the literature review, we found that the vast majority of writers suggest price to have high importance for the store image. In advance, we furthermore assumed that price is of highest importance in the optician sector, and it was thereby chosen to be seen as one of the main characteristics of the competitive situation. In the market analysis, it also became apparent that price and promotions truly are a very important parameter for the optician retail brands in their positioning strategies.

First and foremost, the participants in both focus groups quite surprisingly expressed that price is of rather low priority to them and every time the discussion was about price, the topic turned to be about service, feeling secure with one's optician and getting the right pair of glasses. When we asked whether the participants would pay an extra for high quality service, everybody seemed to have a preference for service over price. One said it this way:

"*You buy the glasses, where they are cheapest, if they are completely similar. But service means a lot and you choose the place, where you feel most secure.*"

In general, it seems as though the participants, as anticipated, have many considerations about their purchase of glasses, but since it is a high involvement purchase, which is made with a an average frequency of a couple of years, the price of the final glasses are of less significance to the participants. One said that she beforehand planned to spend a certain amount of money on her new glasses and other expressed it to be a necessary expense, where the final choice of glasses should not depend on price.

Even though price in both focus groups is stated to be of less importance to the participants, it still seems evident that price has great influence on the participants' buying behaviour. As discussed in the section treating our assumptions, the purchase of glasses is considered as a high involvement purchase. It is evident that the participants seem to buy glasses as rarely as anticipated and seem to exchange their current pair of glasses with a new one and do not have several pairs to switch between at the same time. If the expenditure to acquire new glasses was not so substantial, the participants and consumers in general would perhaps purchase new glasses more frequently and even have several pairs with different styles. One participant actually mentioned it himself:

"*But this is where it would be interesting to see how you would react if the price level wasn't as it actually is many places. Would it then turn out to be a product, which you have in five different pairs? Because then you can suddenly effort it. It is probably due to the price, that you only have one pair.*"

In the literature review, price was moreover discussed in terms of either a negative or positive term and after reviewing the discussions concerning price, it seems as though price is mainly seen in the negative term among the participants. Price was typically referred to as the economic sacrifice and thereby the monetary expenditure that the participants have to incur in order to make the particular purchase of glasses. However at the same time, price was also seen as relative in regard to quality. In general, high quality and price seem to be closely connected according to the participants, which in particular became apparent in the participants discussions concerning the different optician retail brands. The majority of the participants in both focus groups seem convinced that Louis Nielsen must lack behind in some areas, because the brand offers glasses at such low prices compared to the other optician retail brands. During the discussion of the optician retail brands some stated:

"In German you say preizbillig, it is not just cheap – its very cheap and bad service. It is connected. Though, I'm not convinced, that even though the price is 3-4 time as high at the other places that you then get 3-4 times as good quality."

"You get what you pay for."

"*…When I really must spend so much money on glasses, then I think that my considerations are that I want something neat and a good quality. And therefore I don't visit Louis Nielsen, because I don't believe that I get the quality I seek."*

In the literature review another aspect of price was touched upon, and that was whether or not the consumers are able to compare prices across the different optician retail brands. As, we wanted to examine this further, we directly asked the participants, whether they perceive the sector to be opaque concerning price. The result seems to be that both focus groups find it possible to compare prices when it comes to the frames of the glasses, but the majority finds it difficult to compare glasses when the spectacle glasses are taken into account. Several said that one thing is the sale offer in the window or in the commercial, and another thing is paying for the final glasses with special spectacle glasses and modified frames etc.

The amount of special offers and continuous promotions seems to make the different optician retail brands even less comparable for the participants, and many rejected that they are influenced by promotions. One said:

"It can be very difficult to distinguish, where they have a really good price and where it is merchandise on reduced prices."

Another continued and said it this way:

"It is often frames, which are on sales and it is usually not those which are expensive. It is the spectacle glasses, which cost. Therefore I would say that as long as it is the frames, well, of course it has influence, but they never offer 50 % discount on spectacle glasses, and that would mean more."

One from the 40+ focus group also expressed his view upon the difference between, what is promoted and what you end up paying:

"*Both my wife and I use glasses, and I believe we saw an offer in the local newspaper from Profil Optik in Solrød Center. And since it was some while ago we had changed our glasses – which we don't do very often, we therefore thought we were going to get some cheap glasses, but you seldom do, since your spectacle glasses suddenly do not function right and you need to get one thing and another extra. And suddenly you pay an arm and a leg, when you are done. You got 800 DKK in discount, but when you add all their extra charges and thus on, the promotion did no longer hold."*

Among the optician retail brands, the new trend of offering zero payout and some instalment payments seems to make it difficult for the participants to compare price. One of the participants in the 40+ group compares the optician sector with the telecom industry:

"At one time, I thought about that the optician sector was starting to learn from the mobile sector. And everything had to due with that you could visit the optician and get a frame for 1 DKK, and then the price of the spectacle glasses was added and then it started to become opaque. Just, as you can buy a cell phone for 1 DKK and then pay for the subscription afterwards. And suddenly it is way more expensive…"

In general, the focus group interviews have made us aware of the fact that promotions and special offers do not seem to create extra demand or speed up the decision to purchase a pair of glasses. Most participants only consider buying new glasses, when their eyesight has chanced, and when they therefore are in need of new spectacle glasses with modified strength. Others are only in the market for glasses with a certain frequency, for instance did several participants mention that they buy new glasses about every second or third year, and during the intervening time they are not aware of or see themselves as responsive to a good offer. Though, it should be mentioned that some of the participants due admit or recognize the influence promotions might have. The focus group with 20-40 years old also came to the conclusion that promotions must work, because otherwise there would not be as many promotions and special sale offers.

In addition, it must be mentioned that price and promotion might be one of the attributes, whose affect is mostly unconscious. The gathering of people in the focus group could have made a certain atmosphere, where the participants did not want to seem too price-sensitive or focused and perhaps some of the participants did not feel comfortable with revealing that they actual like a good bargain.

Furthermore, it is necessary to point out that the participants often seemed to answer the question based on whether or not promotions influence them to buy a new or extra pair of glasses and not whether those already looking for a new pair would be attracted to another store than normally. In that connection, it is important to emphasize that in general the distinction between influencing and affecting consumers' entire buying patterns and on the other hand their particular store choice is considered as extensive. Therefore, the last mentioned scenario is still considered as likely, and price and promotions are viewed upon as a parameter that helps generating store traffic.

As a sum up, it must be stated that based on these interviews, price seems to be of less importance than first assumed. It is, as said above, possible that the participants underestimate the influence of price, but they sure seemed convinced that other attributes such as service has a greater affect and importance to them. As mentioned in the section concerning service, it seems as though service and not price is perceived to be the most essential attribute. In fact, price was only given the average score of 3.5 by the participants in the age of 20-40 and this seems very high considering that the scale was informed to be from 1 to 5, where 1 was the most important attribute. The participants though seem to disagree about the weights of the importance since both 1 and 5 were represented as can be seen in Appendix 12. In the 40+ focus group, price was expressed to have greater influence with a very agreed score on average of 2.5, but still it is a higher score than anticipated beforehand.

10.1.3 Store Atmosphere and Design

In the literature review, we argued that the optician retail sector is a matured retail market and as a result, we found that innovative design and atmosphere is a way of keeping the retail offer fresh and differentiate from the competitors. In addition, we saw that the majority of writers claim that an appealing retail store design and atmosphere do influence consumers' perception of a store's image, which indeed increase the importance of this attribute.

Overall, there seemed to be a general consensus in terms of store design and the importance of this attribute. It matters if the participants fell comfortable the moment they enter the store, and it is important to be able to survey the possibilities of the store quickly to avoid being confused of the many different frames. In addition, the store has to be friendly and look decent and tidy. Some comments were:

"It matters if the store is nice, clean and neat."

"The first hand impression is definitely important. The place is clean and the store looks decent. We know it from our selves when we have guest, then we clean the place. That means something to me."

In the literature review, we also found that the use of good lightning can add value to a store atmosphere and positively influence consumers' shopping behavior. We predicted that bright lightning especially plays an important role in the optician retail sector in order to highlight all the products and mirrors. Some participants mentioned this factor and one actually said:

"Especially the light is important, when you try on glasses, it definitely plays a role."

The value of exclusive store design and the impact it can have on consumers' perception of store image was not discussed in the literature. However, the participants were asked about if it is something they value, but only a few commented on it and find it relevant. One participant from the 20-40 focus group emphasized that since every one of the participants live in Copenhagen or near by they expect a certain level and no retail stores can survive without having a decent and good-looking store. A participant from the focus group 40+ underlined that the style of the store and what it signals is crucial when going into a store. It is important that the participant can identify himself with that store. The participant added this comment:

"I like when there is something that tricks me. I like to feel that this is a place I like to profile myself with. So, if I was to have new glasses the look of the store definitely plays a role. If it is not my style, I would not go in there."

To the majority, it seems like exclusivity is of no great consequences as long as the store is clean, nice and decent. In general, the participants did not have many comments and explanations to store atmosphere and design and many of the elements touch upon in the literature was not evoked and mentioned. In fact, this attribute was given the average score of 4,8 by the participants at the age of 20-40. As a result, store atmosphere and design is then ranked as the less important attribute of them all with a big gap to the next attribute; price 3,5. In the focus group 40+, the attribute was given an average score of 4, and in this group one participant seems to disagree about the weight of the importance. The number 2 occurs on the list as can be seen in Appendix 12. In general, the 40+ participants value this attribute higher compared to the other group. In this group, store design and atmosphere is not the far less important attribute and is several times ranked with the number 4.

10.1.4 Assortment

When we look closer at the assortment, it is evident that the participants' perceptions of its importance are aligned with our findings in the literature review and is thereby relatively high. Almost all participants agreed that it is important to them that the optician retail brands have a generally broad assortment with many brands, designs and colours. Some even expressed that the assortment of glasses are the pivotal attribute, when choosing which store to visit. Two participants said:

"I have always chosen the optician by where I have fallen in love with a frame. When I'm about to buy glasses, I have always first been to all the world's stores and chosen which frame I want, and that has then been essential for which optician was chosen."

"…When I needed some new glasses, I went to different stores and looked around to find, what fits me…"

Thus, it became quite clear that the optician retail brands must have a broad selection of different glasses to get visits, but moreover it was also apparent that both focus groups thought about, whether the offered selection has any relevance and seems attractive to them. They were all aware that in general optician retail brands have a very broad assortment to attract and serve as many customers as possible, whereas the small independent opticians seem to be perceived as having a more narrow and targeted selection. One in the 20-40 focus group said:

"I think, it has much to do with the big chains, they have a very broad selection. The have a bit of everything and must target a broad target group. Thus, they have a few of every brands.

When I myself was looking for new glasses, I was in all the stores I could enter. Thereby you realize that the small stores in some way have their own style, where you get around all the mainstream at Thiele and Synoptik."

When the discussion treated the brands and designs, it was quiet clear that the participants do not consider themselves to have a particular manufacturer brand in mind or ever visit an optician retailer to see the assortment within a particular designer brand. The comments were:

"I seldom look at certain brands. For me the assortment just has to be very broad, thus there is some different to try on. For me it is about whether or not they fit."

"To me it was neither like it had to be a brand on any account. I'm not in to blingbling. It should rather be a bit casual. I just entered with the idea, that I should have a designer frame, but when I realized it wasn't something for me then I looked more around. So it was sort of my first attitude. Today I will probably go for the shape of the frames before I look at the brands"

In the literature review it was discussed, whether consumers are loyal to the optician retail brand or to the merchandise brands offered at the retailer, but when this topic was treated in the interviews nobody talked about being design or brand loyal to merchandisers. Actually only one mentioned a certain brand, which she once has had preference for. Therefore, we will not look further into the possibilities of having exclusive rights on any designer brand. Perhaps a bit more surprising does the importance of finding and having a trendy and modern frame and design seem limited among the participants. Several talks about finding a dateless designer brand since the glasses are intended to be worn for several years. One in the 20-40 group said this:

"Now, You said (Tehneyat) that you rarely buy glasses. And when you spend a lot of money, you want to avoid the need to exchange after six months. Of course it matters a great deal,

when you choose, but preferably it should be a dateless design, thus you feel good about wearing them for a long time."

Another commented this, when the discussion treated, whether the participants notice commercials for glasses:

"…What makes me choose a new pair of glasses - it is my eyesight and not the other way around. It is not the style, which dictates it. Thus, therefore it is also important to me, that they are rather dateless, that there isn't something like loud pink."

The question concerning how important the assortment is to the participants is revealed in the small questionnaire in Appendix 12. In average, the 20-40 focus group scored the assortment to 3.0 and were very much in agreement since everybody rated it within 2 to 4. The 40+ group unveiled the same rating with an average score of 3.2. Though, the senior participants were more diverse in their attitude toward the importance of the assortment, since one rated assortment to be the most important attribute while another gave the opposite score of five.

10.1.5 Location

In the literature, we found that location has long been recognized as one of the prime determinants of store choice. Today, it is still argued to be an important attribute as it can satisfy consumers' needs for convenience and accessibility. This theory was supported by the comments from the participants, when they were asked about the importance of location.

The majority of the focus group 20-40 expressed that it is a valuable factor and it is important the store is close to one's home or work. A few participants at the age of 40+ supported this opinion, and one person said:

"It is important to me, especially if something should happen then I can get there easily and quickly."

In continuation hereof and in terms of the time of visiting a store, one from the group 20-40 expressed:

"To a great extent it is done at the end of ones day, so it is actually quite obvious that it is placed closed to ones home. That is something I have prioritized a lot."

A participant from the group 40+ added that location is important but because buying glasses is not something that is done often, then it is fine to drive longer to get to an optician retailer. In the literature review, we also discussed that due to the power of visibility, optician brand stores are scattered all over Denmark and are often placed in clusters. Some of the participants in the age of 20-40 actually talked about the advantage of this aspect:

"Within a range of just 100 meters you have 3 options…"

"Synoptik and so on, they are every where – at Østerbro and Vesterbro. You have many options and possibilities all the time and you do not have to change an optician retailer, just because you are moving around the city. That is an advantage you can say."

Even though the literature claims that location is loosing its' relevance in today's retail industry, it seems like it still plays a role, especially to the younger generation. Except from one person, all the participants at the age of 20-40 gave location the number 2, and one even rank location as the most important attribute. If we look at the average, location is given 2,2 and is therefore the second most important attribute after service among the young participants. Looking at the participants in the ages of 40+ we see a totally different picture. In this group, the majority thinks that location is the least important attribute of them all and therefore on average, location is given 4,2. So therefore, it is mainly the participants at the age

20-40, who believe that location is a valuable factor and only a couple of people from the 40+ focus group support this view. See Appendix 12 for the gathered results of the survey.

10.2 Store Image, Satisfaction and Loyalty

In the literature review, we became aware that the attributes, which are important for store image and satisfaction might not always be the ones, which also affect loyalty. The small introductory discussion concerning the participants' last visit to an optician store therefore also treated, whether the attributes important for satisfaction were the same as those important for loyalty. Loyalty was furthermore discussed both in regard of returning to the same store and if the participants would recommend the store to others.

Service and great assistance was evidently the most mentioned and referred to attribute, when it concerned satisfaction and getting a pleasant store experience. In addition, service and the personal interaction also seem to be important for the loyalty of the participants themselves and whether they will recommend the store to others. The crucial impact, which service seems to have among the participants, was also seen in the literature review, where a research showed that sales assistance was the only variable, which contributed significantly to both satisfaction and loyalty.

Building trust and getting a personal relation to one of the opticians seems to be essential when looking closer at loyalty separately. In addition, it was revealed that the recommendations often are personal and that the participants not only would refer to a certain store of the optician retail brand, but also to a particular member of the staff. An essential notion to include in our discussion regarding our recommendations for Thiele is therefore the importance of developing and enhancing the employees' ability to connect with the customers and also enhance the staff skills to appear trustworthy and convincing in the guidance.

10.3 Brand Personality

In the literature review, we saw that brand personality is often defined as the set of human characteristics associated with a brand. As brand personality is reflected in the way consumers describe a brand, we found it relevant to first ask the participants about their free brand associations to each brand, then hand out a paper with already listed brand characteristics and finally ask them directly 'If Brand X was a person, how would you then describe that person?'. The following analysis of brand personality of each brand will be a combination of the results gathered from all 3 questions[153].

Louis Nielsen

In terms of the free brand associations, all participants, except from one person, consider Louis Nielsen to be cheap or even 'discountish'. In addition, poor service is mentioned four times and non-competent one time. It is arguable that non-competent is closely linked to poor service and fall under this category, as it is a part of service as accounted for in the literature review. Finally, comments about the commercials from Louis Nielsen are represented five times, and thus it is among the top 3 most listed associations. Based on these free associations, Louis Nielsen appears to be a person who prefers to shop at low prices, not service oriented and like to be seen in public.

To a great extent, this picture is supported by how the participants described Louis Nielsen as a person. Some of the comments were linked to low prices:

"One who thinks is has to be cheap."

"To me, it is someone who shops a lot in Netto … all the time I see this person walking around in Netto with dicount all over. It is clever what they are doing, but you get that Netto-feeling all the time."

[153] See Appendix 13: Free Brand Associations from Focus Groups + Appendix 14: Brand Characteristics 20-40 year old – Results + Appendix 15: Brand Characteristics 40+ year old - Results

Looking at Appendix 14 and 15, we see that everyone without exception has marked Louis Nielsen to be cheap and almost half of the participants furthermore added a discount characteristic. Other comments were linked to Louis Nielsen's way of doing advertising:

"I think they are a bit provocative in its branding, which makes me think of them as young and naughty."

"The naughty and provocative boy in class in terms of how they are making some special offers and dare to be cheap."

In continuation hereof, some added that it is a person who stands out from the crowd and walk in the opposite direction. This is supported by the marks at Appendix 14 and 15, in which some of the participants have marked daring, spirited, naughty and young.

In the literature, we found that brand personality can be accessed trough five personality traits. Based on how Louis Nielsen is described so far and looking at Appendix 14 and 15 of brand characteristics, we would argue that Louis Nielsen is mainly characterized by excitement. The participants see Louis Nielsen as a person who is not afraid to stand out from the crowd, be daring and take some risks. That person is young and is not afraid of breaking rules in order to reach its goals. Looking only at the brand characteristics, they indicate that Louis Nielsen to some extent is characterized by a bit of sincerity, because words like family oriented, honest, cheerful and friendly are marked.

<u>Nyt Syn</u>

Based on the free associations, it is evident that none of the participants know the brand Nyt Syn. Only a few indicate that they might know the name but they cannot associate Nyt Syn to anything. In terms of brand characteristics, the majority chose not to mark anything and as a result, it is very difficult to analyze the brand personality of Nyt Syn, as the results are very unreliable and not worth commenting.

Profil Optik

In terms of the free associations, no clear opinion is formed of Profil Optik. There are not that many words that are repeated by various participants and some of the participants do either not know the brand or confuse it with some of the other brands[154]. The same is present for the description of the brand personality, which results in a mixed and slightly blurred picture of Profil Optik's brand personality.

As a free association, the high price level is one of the only factors mentioned by more than one of the participants. Four people at the age 40+ think of Profil Optik as being high-end and more expensive than some of the other brands. One person from this group describes the brand as one of the most exclusive, along with Synoptik and Thiele.

When the young group was to describe Profil Optik as a person and plot in marks of the brand characteristics, the majority finds Profil Optik old, dusty and dull. Some participants said:

"It is the loyal customer, who is older than us, who keeps returning after many years."

"I am thinking at Danske Bank, you know a bit conservative."

In general, it is difficult to find a homogenous description of Profil Optik among the participants. At Appendix 14, it appears that the young participants have not ticked of that many personality traits and the ones marked do not point in the same direction. Among the participants at the age 40+, more traits are marked and with a small majority, some traits are linked to the personality of competence. If we consider the fact that many other traits have been marked too and signal some other brand personalities, and the young participants form no clear brand personality, it results in a blurred personality description.

[154] See Appendix 13: Free Brand Associations from Focus Groups

Synoptik

If we look upon the list of the free associations, it appears that words like big retail chain and well-known are listed in almost every sentence from each participant. It is the most written word of them all. Next, there are many words in relation to Synoptik's advertising and communication like many commercials, Lars Hjortshøj (the endorser of the brand), and many offers like 'discount of your age'. Finally, half of the participants wrote words like assortment and wide range of products[155]. If these associations are linked to the personality of Synoptik, this brand can be described as a well-known person, who is not afraid to 'shout out loud' and show and tell about who Synoptik is. Furthermore, Synoptik is a person who prefers to have many different options and therefore a wide range of products.

Looking upon the participants' descriptions of the personality of Synoptik, the majority of the participants from 20-40 consider Synoptik to be a very family oriented person. One of them said:

"Family oriented and also successful. They have managed to create an image and a brand. We all know them and that is a success."

The last sentence is closely linked to the free associations of big and well-known mentioned above. In continuation, all participants at the age 40+ characterize Synoptik to be old, classic and the traditional kind of type. One expressed it like this:

"Just because we say it's old, does not have to be negative, but it is classic and traditional. They haven't exactly renewed themselves the most."

Even though, old was mentioned when the participants talked about Synoptik's personality, it is on the other hand only marked two times in terms of brand characteristics. That might be

[155] See Appendix 13: Free Brand Associations from Focus Groups

due to the fact that old is not thought of in negative way as one said, and when many other words are listed, others are considered more suitable for Synoptik.

In terms of the brand personality traits, it appears that Synoptik is characterized by competence. The main part of the marks are placed at secure, successful, leader, technical and confident, which are linked to competence according to Aakers definition[156]. In continuation of these characteristics, we did add some other words that we consider belong within the factor of competence. These are professional, experienced and specialized and all of them were heavily marked. Especially the professional angle is apparently a characteristic the majority finds valid and true.

Thiele

In terms of free associations, words like big, well-known and been in the business for many years are listed most of the times at Appendix 13. In addition, many of the participants wrote words linked to service and sales personnel like service-minded, friendly and competent personnel. Appendix 14 and 15 support the comments of service and sales personnel as the majority of the participants have marked words like real, original, cheerful, friendly and kind.

When asked about Thiele's age, there were participants at the age 40+ who expressed that Thiele is a grown-up, middle ages person but still young. One of them wrote and explained:

"The new famous one that wants to be modern…. They have went to kindergarten and school, and did grew up with Synoptik - Synoptik has continued to be that lady who wears a pleated skirt and Thiele is trying to stand out a bit…. Thiele tries to be more young."

[156] See appendix 14: Brand Characteristics 20-40 year old – Results + Appendix 15: Brand Characteristics 40+ year old - Results

At Appendix 15, it appears that other participants agree to this opinion as the brand characteristics of trendy and young were marked 5 times in all. In addition, one from the focus group 20-40 finds Thiele quite trendy because of its selection and added:

"I perceive them as quite young. Both in terms of their target group and their selection assortment."

Finally, the good quality and the high price level were mentioned by some of the participants in the free associations. At the same time, these associations appear from Appendix 14 and 15 with words like quality and detail oriented plus exclusive. Though, it must be stressed that quality and price are not mentioned to such a great extent like the other mentioned areas were.

Based on the participants' perception of Thiele, the brand can be characterized by competence and sincerity. The brand characteristics from Appendix 14 and 15 clearly shows that according to the participants, Thiele is family oriented, real, original, cheerful, friendly and kind. Compared to the other brands, Thiele is the only brand, which scores that high on sincerity. Next, Thiele received many marks at words linked to competence in the way Aaker defines it, but also at the words we have added like professional, experienced and specialized. It appears, that compared to Synoptik, the participants find Thiele less 'competent' because Synoptik 'scored' more marks within that area. But Thiele is indeed close to Synoptik and is on the other hand perceived powerful in terms of sincerity.

10.4 Evaluation of the Optician Retail Brands

Besides analyzing the importance of the different attributes and creating an understanding of how the brands' personality can be characterized, it is also necessary to include an analysis of how the optician retail brands are evaluated and which position they seem to uphold. Since our empiric consumer analysis only have involved few people in the focus groups, we have chosen not only to analyze the attribute evaluations based on the questionnaires from the focus group interviews, but also to include some outputs drawn from TNS Gallup.

The qualitative research method was seen as the most appropriate to gather information about the attributes, to create an understanding of how the participants perceive the optician retail sector and which considerations are made during their purchase decision. Given that, this section will treat, how the different optician retail brands are evaluated, it is seen as necessary to support the findings with data collected based on quantitative methods. We would have preferred to only use quantitative data in this part of our consumer analysis, but unfortunately the only attributes made available through TNS Gallup are price and quality. Therefore, the following analysis will be based on both qualitative and quantitative findings to create a diversified discussion with an acceptable level of reliability.

In the focus groups, we asked the participants to evaluate the different optician retail brands in connection to all the attributes to get an understanding of the different brand positions. After the discussions, we therefore handed out a final small questionnaire[157], wherein the participants had to evaluate the optician retail brands for all the selected attributes on a scale from 1-5. In addition we also conducted the exercises with perceptual maps, which had no figures a long the axes and therefore challenged the participants to think of the distance between the brands instead of how each brand should score.

Louis Nielsen

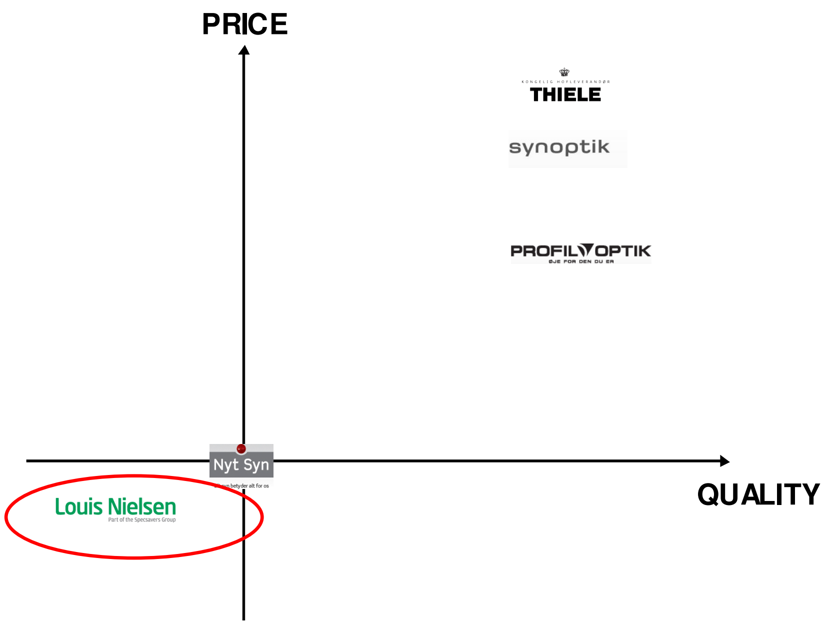
First and foremost, it is evident that Louis Nielsen is perceived to be the cheapest optician retail brand of them all. As touched upon above, in the section about brand personalities, the word cheap and also poor service were mentioned several times by the participants, and this perception is also obvious in the participants' evaluations of Louis Nielsen. The score of the overall quality is especially low for Louis Nielsen compared to all the other optician retail brands since both focus groups on average only evaluate Louis Nielsen to 2.5 on a scale from 1-5, where 5 is the best score[158]. The rather low evaluation of Louis Nielsen's quality is also

[157] See Appendix 7: Evaluation of the Optician Retailers
[158] See Appendix 16: Evaluation of the Optician Retailers – Results

evident in the perceptual maps from TNS Gallup, where Louis Nielsen is the only retailer, which gets a score of less than 3 among the 20-40 year old[159].

As expected, the participants also gave Louis Nielsen a low average of 1.5 and 1.6 on a scale from 1-5, where 5 was high price, to the question "How do you perceive the price level to be for the following optician retail brands?" In the exercises with perceptual maps, Louis Nielsen was in addition the only brand placed way low, when price was the Y-axis, and the distance to the other optician retail brands was generally profound. The position can be seen in this perceptual map from the exercises in the 20-40 focus group[160]:

Figure 3: Perceptual map from the 20-40 Focus Group



[159] See Appendix 17: Perceptual Map from TNS Gallup 2009
[160] See Appendix 18: Perceptual Maps from Exercise to see all maps

The same position can also be seen in the perceptual maps from TNS Gallup, where Louis Nielsen sticks out and is evaluated to be the low price optician retailer among both the 20-40 and 40+ year old[161].

Furthermore, Louis Nielsen got the worse evaluation of the attributes; Service, Store Atmosphere and Design plus Assortment. The 20-40 focus group actually thinks that Nyt Syn and Profil Optik have slightly poorer service, but it must be mentioned that either of the participants have had much or even non-experience with these optician retail brands. In addition, it must be pointed out that in connection to location and availability, Louis Nielsen does well among the participants and can therefore in all be said to be a low price alternative with poorer performance that is easy to access.

Nyt Syn

The results for Nyt Syn are as mentioned earlier very difficult to analyze since the participants in the focus groups were unaware and unknown to the optician retail brand. The majority of the participants chose to give Nyt Syn a score of 3 in every question in the questionnaire, thereby making the score equal to a "Don't Know" space. Few chose to answer based on their immediate expectation or imagination after hearing the brand name, which of course makes the small variation in the resulting table very unreliable and not worth commenting. Furthermore as can been seen in Appendix 17, Nyt Syn was placed in the intersection of the X and Y-axes to illustrate that the participants do not know where else to place the brand.

From TNS Gallup it can be seen that Nyt Syn seems to be evaluated as a mediocre optician retailer, since the brand is among both age groups placed beneath the other retailers except Louis Nielsen and can be considered to be a less expensive retailer, which delivers less quality[162].

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[161] See Appendix 17: Perceptual Map from TNS Gallup 2009

[162] See Appendix 17: Perceptual Map from TNS Gallup 2009

Profil Optik

When looking closer at Profil Optik, it becomes apparent that the two focus groups disagree about the optician retail brands' performance in regard to the different attributes. First of all, during the focus group interviews it was made clear that the 40+ participants have had much more experience with Profil Optik and are much more familiar with the brand offerings.

In connection to the scores of the different attributes, it seems as though a better awareness and knowledge of the optician retail brand, make the 40+ participants give Profil Optik a better evaluation. Every attribute except location gets an average of 3.8 – 4.0 from the 40+ participants, which places Profil Optik as one of the best scoring optician retail brands[163]. When looking closer at the outputs from TNS Gallup, it becomes apparent that the two age groups actually evaluates Profil Optik very similarly, though a more positive score from the 40+ is present again[164]. From TNS Gallup is should furthermore be noticed that Profil Optik and Synoptik are getting almost identical evaluations, when looking at price. Both age groups give the two retail brands a score between 3.45 – 3.46. The 20-40 year old however give Synoptik a better evaluation of the quality, whereas the 40+ year old do the opposite and evaluate Profil Optik slightly more positively.

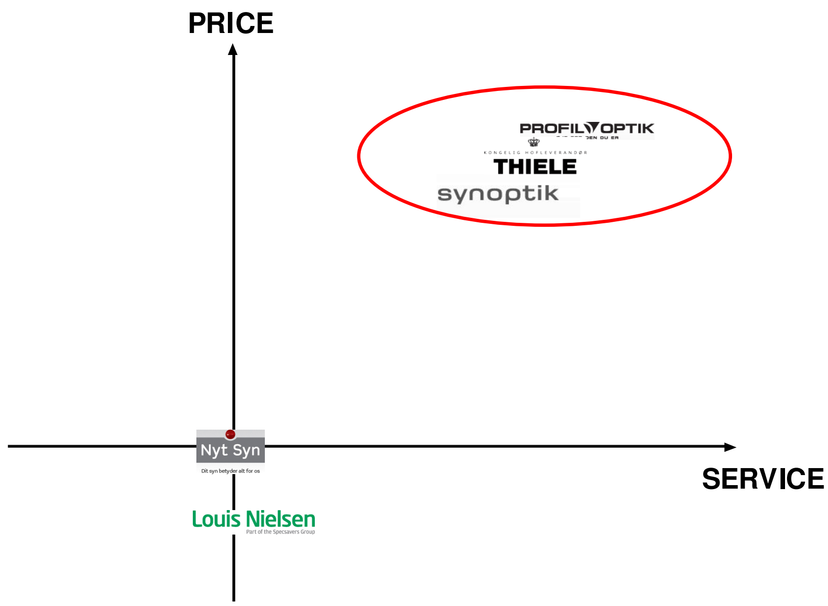
Some of the participants in both focus groups mentioned that Profil Optik actually can be difficult to separate from the others, and as can be seen in Appendix 16, Profil Optik, Synoptik and Thiele are evaluated very similar and with small margins for almost every attribute among the 40+ participants. In the 40+ focus group, Profil Optik is even identified as one of the optician retail brands in some sort of cartel, which is thought to be established among Profil Optik, Synoptik, and Thiele. One participant said:

"Well, the way I see it with Louis, is that the cartel, which Synoptik, Thiele and Profil Optik have, Louis is not part of this cartel, where some certain price level and service policy etc. is determined. The other chains maintain artificially higher prices."

[163] See Appendix 16: Evaluation of the Optician Retailers – Results
[164] See Appendix 17: Perceptual Map from TNS Gallup 2009

Later on when the participants were working with the perceptual maps, the same participant in the 40+ focus group stress that the cartel is made clear by the resulting positions. This can be seen underneath:

Figure 4: Perceptual map from the 40+ Focus Group



The same cartel is also evident from the scores given by the participants in the questionnaire and present in the perceptual maps from TNS Gallup[165], though with the exception that Nyt Syn is now closer positioned to the others.

[165] See Appendix 17: Perceptual Map from TNS Gallup 2009

Figure 5: Perceptual Map from the 40+ Focus Group's Evaluation of Price and Service

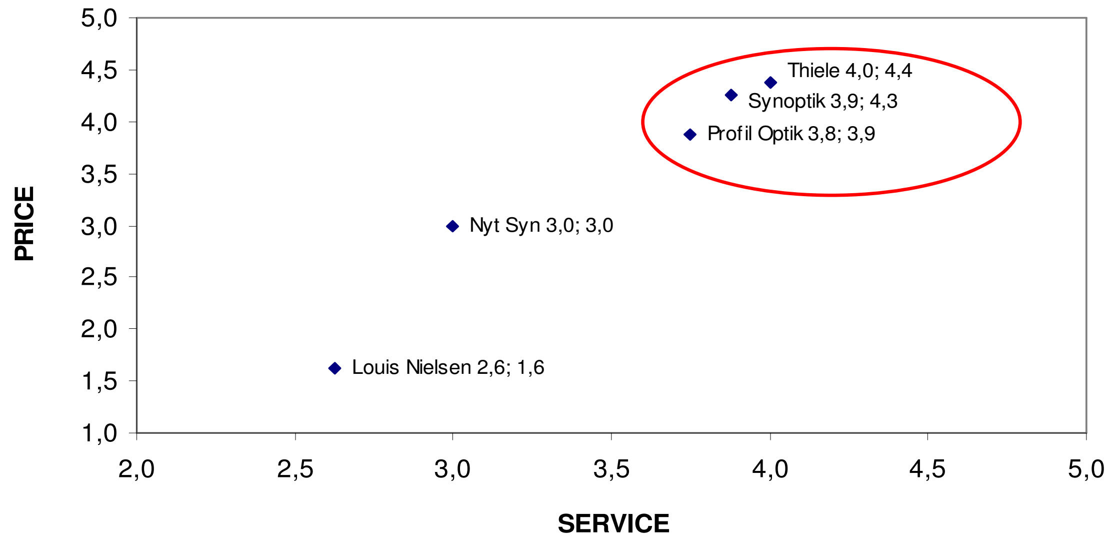
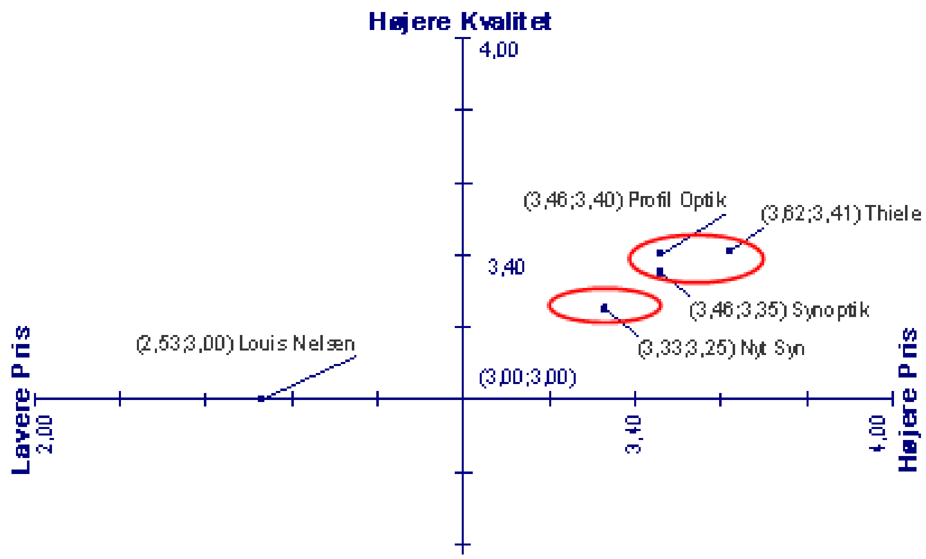


Figure 6: Perceptual Map from TNS Gallup - 40+ year old



<u>Synoptik</u>

The majority of the participants is most familiar with Synoptik, and all participants have had some or several experiences with the brand. Some in the 20-40 focus group even expressed that they see Synoptik as their preferred choice of store. As can be seen in the Appendix 16, especially the younger participants evaluate Synoptik very positively and when we asked, which optician store the participants visited last time, Synoptik was mentioned several times. One participant furthermore expressed loyalty towards the brand.

“Synoptik, I’m use to them and would not change without any reason. Unless I move or get a new job abroad.”

The younger participants nevertheless partly agree with the 40+ group, which sees Synoptik as dusty and a bit conservative and when focusing on the assortment, Synoptik is evaluated equally or only slightly better then Thiele among the 20-40, whereas the 40+ participants give Thiele a better score[166]. From TNS Gallup, it is also evident that the young respondents are more positive towards Synoptik than the 40+ year old in connection to quality, since the young respondents have Synoptik as the best quality option while the 40+ year old only has them as third right behind Profil Optik and Thiele[167].

The generally positive evaluation seems to be very much aligned with the brand personality described earlier, where Synoptik is characterized as being professional and competent. All participants in both groups furthermore perceive them to be among the most expensive, which is also the case when looking at scores from TNS Gallup. However, being evaluated as expensive should not only be seen as negative. It was made apparent in the literature review that price and quality are often interrelated, and when the overall impression from the focus group interviews and TNS Gallup output are reviewed, it seems as though Synoptik is perceived more as a value for money or high-end alternative and not just as expensive.

Before conducting the focus groups, we expected Thiele and Profil Optik to be evaluated and perceived as the closets rivals. But after reviewing the interviews, the exercises and the perceptual maps from TNS Gallup, it is evident that Synoptik is perceived more positively and thereby is in closer competition with Thiele, then anticipated. If the generally high awareness and the great score in connection to ‘consider to buy’ as touched upon in the

166 See Appendix 16: Evaluation of the Optician Retailers – Results
167 See Appendix 17: Perceptual Map from TNS Gallup 2009

market analysis, is also taken into account, Synoptik must now be considered as a close competitor on equal terms with Profil Optik.

Thiele

When looking closer at Thiele, it is immediately evident that Thiele is perceived to have high price levels among the participants. Both groups give Thiele the highest score with an average of 4.0 and 4.4[168]. The general picture from TNS Gallup gives the same impression, where Thiele certainly is the price 'winner' among both age groups[169]. While Synoptik clearly is perceived as the best performing optician retailer among the 20-40 year old in the focus group, Thiele is the highest scoring optician retail brand among the 40+ participants.

Thiele is in the focus group of the 40+ especially perceived to outperform the other optician retail brands in connection to assortment and quality, but the perceptual maps from TNS Gallup show that Thiele is in general only getting a marginal higher quality score, since Thiele get 3.41 and Profil Optik 3.40. The younger participants also evaluate Thiele positively in regard to assortment and quality, but overall the competition is considered as very fierce, when reviewing the results from the qualitative and quantitative analysis, especially when the price evaluations are taken into account.

One interesting finding can however be seen, when only focusing on the assortment attribute. Both focus groups evaluate Thiele very positively in regard to this attribute, and the 40+ participants give Thiele the absolutely best score of 4.4. During the discussions, Thiele was furthermore mentioned as more trendy than Synoptik among the 20-40 olds. One participant put it this way:

"*I have them as the market leader, more expensive and brave and also quality conscious. And I also think, that the assortment is rather trendy.*"

[168] See Appendix 16: Evaluation of the Optician Retailers – Results
[169] See Appendix 17: Perceptual Map from TNS Gallup 2009

Finally, as also mentioned above when looking at Synoptik, the high scores for Thiele regarding price should not only be interpreted as negative, but instead be seen as an indication that Thiele is perceived as an high-end alternative and considered to be evaluated as a high performing optician retail brand with very high prices.

10.5 Part Conclusion

After having analyzed the results from our focus group, we can conclude that in general the store image attributes seem to play an important part, when consumers are deciding between optician retail brands.

In the literature review, we found that the high service delivery and high service quality is one of the most important attributes affecting store choice. In our analysis, service appears to be the most important attribute of them all; especially the importance of sales service is high and mentioned many times, when the participants were to characterize a good store experience. This finding surprised us, as we assumed price and promotion to be the most important attribute of all five. As price and promotion might be an attribute whose affect is more unconscious than others, the participants might have underestimated the influence of price. So even though the participants rated service to have the greatest impact, we still need to be aware of the effect that price and promotion have according to the findings in the literature review.

In terms of assortment, we can conclude that a broad assortment with many brands, designs and colors are important when choosing an optician retail store, which is very much aligned with our findings in the literature review, besides the low designer loyalty. The same scenario is not quite seen in terms of location. In the literature, we found that location has for a long time been one of the prime determinants of store choice, but today it is loosing its' relevance. After having conducted the analysis, it however appears that location still plays an important role, especially to the younger participants. Finally, we can conclude that the attribute of store atmosphere and design is ranked as the less important attribute. Exclusivity does not seem to be of great importance as long as the store is clean, nice and decent.

In regard to brand personality, we can conclude that Louis Nielsen is the brand with the clearest personality description, and is characterized by excitement and considered cheap. Synoptik is known for being a big retailer and has personality traits linked to competence, including professional. In terms of the personality of competence, Thiele is not considered quite as competent as Synoptik but instead, Thiele is more associated to the service aspect, especially sincerity is more related to the brand compared to the others. Finally, we can conclude that no homogenous personality description of Nyt Syn and Profil Optik is formed.

In the consumer analysis, the participants were asked to evaluate the optician retail brands and based on a small questionnaire and perceptual maps, we can conclude that Louis Nielsen is the only brand really sticking out of the crowd. The brand is perceived as the cheapest optician retailer and with a much lower degree of quality compared to the other brands. In continuation, we can conclude that Thiele is perceived as the brand with the highest price level, closely followed by Synoptik and Profil Optik. In terms of service and quality, the same three brands are perceived quite similar, and as a result the brands are placed very close when looking at the perceptual maps. The majority of the participants do not know Nyt Syn and therefore we can only characterize Nyt Syn as a mediocre retail optician brand based on the perceptual maps from TNS Gallup.

11. Positioning Strategies and attractive Optician Retail Brand Positions

In this chapter, we will start by presenting general positioning definitions found in theories. Next, we will analyze and discuss how the optician retail brand can be positioned in regard to the generic positioning strategies, followed by a discussion of how the optician retail brands can use and utilize the store image attributes in a positioning strategy.

In the consumer analysis, we explored how the different brands are perceived in terms of price and quality and by implicating the perceptual maps, we want to discuss which retail brand positions are considered attractive in the optician market. We want to touch upon the future possibilities and challenges the brands are facing and discuss which positions are sustainable and not least obtainable for each of the brands to take.

Positioning definitions

At the beginning of the thesis, we clarified that by positioning we mean, how an optician retail brand can create a message in the mind of the consumer that is closely linked to how the brand wants to be perceived. In general, positioning is all about understanding and establishing the position of the retail brand in comparison to the relative positions of the competing retailers in the mind of the target customers, in terms of key dimensions such as price and quality[170]. Most marketing scholars seem to have a rather consistent definition of positioning. David Jobber (1998) defines positioning as 'the choice of target market, where we want to compete; the differential advantage, and how we wish to compete'[171]. A similar definition is offered by Hooley and Saunders (1993), who state that positioning is 'the identification of target market or markets, the customers that the organization will seek to serve, and the creation of differential advantage, or competitive edge, that will enable the organization to serve the target market more effectively than the competitor'[172]. Finally, Peter Doyle (1994) says that 'positioning strategy is the choice of target market segments, which determine where the business competes, and the choice of differential advantage, which dictates how it competes'[173]. In the theory, there seems to be a consensus that positioning entails identifying and defining the market where the brand competes and seek a differential advantage.

The generic Strategies

In theory, there is more than one strategic approach of positioning, but the most acknowledged, which many theoreticians refer to, is the generic strategies of Michael Porter.
According to Porter (1985)[174] the objective of building a successful strategy is to mark out a defensible competitive position, not just against rival companies, but also against the forces driving the industry competition. Porter is working with two dimensions, distinctive advantage and business scope and by combining these dimensions, the following model occurs:

[170] Fernie, John, Fernie, Suzanne and Moore, Christopher 2003 'Principles of Retailing' p. 115
[171] Jobber, David 1998 'Principles and Practise of Marketing' p. 193
[172] Hooley Graham, and Saunders, John 1993 'Competitive positioning: The key to market success'
[173] Doyle, Peter 1994 'Marketing Management and Strategy' p. 79
[174] Porter, Michael (1985) Competition Advantage: Creating and Sustaining Superior Performance

Figure 7: The generic Strategies of Porter

		DISTINCTIVE ADVANTAGE	
		LOW COST	HIGH COST
BUSINESS SCOPE	BROAD	Cost leadership	Differential advantage
	NARROW	Focused cost advantage	Focused differentiation

Source: Porter (1985) 'Competition Advantage: Creating and Sustaining Superior Performance'

As it can be seen in the figure, the two basic types of competitive advantage combined with the scope of activities for which a brand seeks to achieve them, lead to three (four) generic strategies for achieving above average performance in an industry: cost leadership, differentiation, and focus.

Looking at the generic strategies in terms of the optician retail brands, we would argue that Louis Nielsen is the only brand following a cost leadership strategy. Louis Nielsen sets out to be the low cost retailer in the optician industry. According to Porter, it is necessary that a 'cost leadership brand' can command prices at or near the industry average, and that is exactly what Louis Nielsen is doing. When a brand, like Louis Nielsen can achieve and sustain overall cost leadership, Porter states that the brand will be an above average performer in its industry. Louis Nielsen is then one of the tough competitors in the optician market, as the brand has managed to be the only brand taking a cost leadership position.

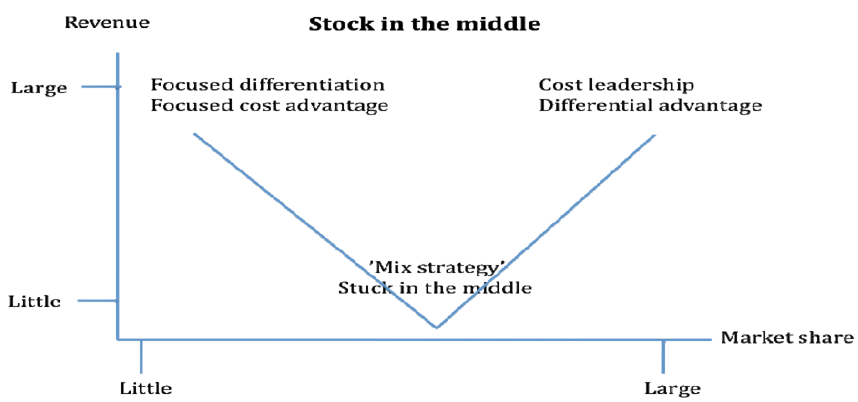
If we focus upon the other four optician brands, we find it very difficult to place them in reference to Porter's generic strategies. Nyt Syn, Profil Optik, Synoptik and Thiele are all brands that seem to follow more than one strategy. All the brands select and focus on more than one attribute that many consumers find important, and then seek to position themselves to meet those needs.

However at the same time, it is arguable that the brands try to follow a strategy inspired by cost leadership as they all focus on price in one aspect or another. E.g. Synoptik has developed the cheap private label called Robert D. in order to compete with Louis Nielsen. As mentioned in the market analysis, most of the communication is price oriented concerning special offers, discounts, free eye check etc. and price seems to overshadow the other attributes.

Finally, Porter talks about a focus generic strategy that rests on the choice of a narrow competitive scope within an industry. This strategy has two variants, focused cost and focused differentiation and it is discussable, if any of the brands are inspired by these strategies. Based on the market analysis, it is though arguable that Thiele and Profil Optik are inspired by a differentiation strategy, as both brands are mid/high-end focused due to an exclusive assortment characterized by lots of designer brands.

Since we find it difficult to place the four optician brands, it is seen as worthwhile to look upon the phenomenon that Porter calls 'stock in the middle':

Figure 8: Stock in the Middle



Own Construct based on: Michael E. Porter (1990) 'The Competitive Advantages of Nations'

According to Porter, some brands might not be able to hold on to one strategy and are therefore focusing on more than one positioning strategy. This minimizes a brand's ability to build a strong brand image and preferences for the brand, and as a result consumers will find it difficult to distinguish the brands from each other. This is exactly the picture we were given from the perceptual maps in our consumer analysis. Besides from Louis Nielsen, and partly Nyt Syn, Profil Optik, Synoptik and Thiele were placed so close to each other as the participants find it difficult to distinguish them.

This phenomenon can be compared to what Martineau calls 'a dull personality[175]'. If a brand does not have a clear and strong positioning strategy and stands for anything special to the consumers, the brand will in most cases end up as an alternative store in the customer's mind. In the consumer analysis, we experienced that each of the participants describe the brands in different ways, except from Louis Nielsen, that is characterized by a similar and specific description, which is also seen in terms of brand characteristics.

In conclusion, we can say that Profil Optik, Synoptik and Thiele need to be more clear about where the brands want to be positioned in the optician marketplace and not mix the strategies. According to Porter, practical experiences show that brands, which follow a 'pure' generic strategy, are doing better compared to brands, which 'mix' the strategies. Furthermore, Porter states that mixing the strategies and being 'stocked in the middle' can influence the brand's market share and economic results in the long run.

11.1 Positioning with the 'Attribute Positioning Model'

In our consumer analysis, we got a broad understanding of which attributes are important in the optician sector, and how the different optician retail brands are perceived and evaluated in terms of these attributes. Ideally, the attributes will reflect the underlying motivation that drives purchase behavior, and can therefore be essential for a positioning strategy[176]. Therefore, we like to present what we want to call the 'Attribute Positioning Model'.

Originally, the model is called 'the Expectancy-Value Model of attitude' and introduced by Martin Fishbein (1980) and further developed by Larry Percy and Richard Elliott (2009)[177]. The result of 'The Expectancy-Value Model of attitude', called the Fishbein Score, is applied for discussion of positioning strategies, and this is our objective as well. Though, in order to make the model usable to our thesis, we have changed and adjusted the originally approach, calculation method and final score and named it the 'Attribute Positioning Model'. By implicating this model, we want to discuss positioning strategies, inspired by either focusing on being the best performer of one or several attributes or changing the degree of importance of the attributes.

[175] Martineau, Pierre (1958) 'The Personality of the Retail Store'
[176] Percy, Larry and Elliot, Richard (2009) 'Strategic advertising management' p. 178
[177] Percy, Larry and Elliot, Richard (2009) 'Strategic advertising management' p. 179

If attributes are to be used for positioning strategies, we want to look for attributes that fulfill three criteria[178]: 1) they need to be important to the target audience, 2) a brand can deliver them, and finally 3) a brand can deliver them better than other brands.

In our consumer analysis, we asked the participants to rate the importance of the five attributes plus evaluate the different brands in terms of how they score on the five attributes. In Appendix 12 and 16, we can see the results of that. Now we will use these results and add them together in a table, in order to discuss the positioning approaches with the 'Attribute Positioning Model'.

Our model is based on the essential element of the original 'Expentancy-Value Model of Attitude', which in our case is to find the attributes that are relevant, when choosing an optician retailer. Therefore we plug them into our 'Attribute Positioning Table'. Next 'the Expentancy-Value Model of Attitude' focuses on the general importance weight of each attribute, where Percy and Elliot have suggested to distinguish between three categories; 3=essential, 1=desirable, and 0=of no importance. In our model, we will not follow this suggestion, but instead involve the figures that emerged from the consumer analysis, however we need to turn them around. The participants were asked to prioritize the importance of the attributes by giving 1 point to the most important and 5 to the less important, whereas the model requires the opposite. Therefore, as service e.g. was given an average of 1,5 among the focus group of 20-40 and as a result weighted to have high importance, service now scores 3,5. So in our 'Attribute Positioning Model' like the original, it applies that the higher the score the more essential the attribute is, we just use another number scale.

Finally, 'The Expentancy-Value Model of Attitude' plugs in the consumers' beliefs of how each brand delivers upon the different attributes. Percy and Elliot suggest the following rating: 3=definitely delivers, 1=does OK, and 0=does not deliver, and again we like to ignore their recommendation and plug in our own data from the consumer analysis.

Now we have all the required data to calculate the final score[179]. According to Fishbein, all attributes should be added, but we have subtracted one factor. This is done due to the negative

[178] Percy, Larry and Elliot, Richard (2009) 'Strategic advertising management' p. 178

aspect of price, as we saw in our literature review, a high price is related to an economic sacrifice. Even though the result of the focus groups showed differently, we still believe price has a determent effect and wants to apply it, which is the reason why we change the calculation method of the score.

Table 1: 'Attribute Positioning Table'

20-40						
	Service	Design & Atmosphere	Assortment	Price	Accesibility	SCORE
Louis Nielsen	3,2	2,7	2,8	1,5	3,8	**26**
Nyt Syn	3,0	3,3	3,2	3,0	2,3	**20**
Profil Optik	3,0	3,2	3,2	3,5	2,8	**20**
Synoptik	4,5	4,5	4,2	4,0	4,8	**33**
Thiele	3,8	3,8	3,8	4,0	3,7	**26**
IMPORTANCE WEIGHT	**3,5**	**0,2**	**2,0**	**1,5**	**2,8**	

40+						
	Service	Design & Atmosphere	Assortment	Price	Accesibility	SCORE
Louis Nielsen	2,6	3,1	2,9	1,6	3,5	**17**
Nyt Syn	3,0	3,0	3,0	3,0	0,1	**13**
Profil Optik	3,8	3,8	4,0	3,9	3,0	**18**
Synoptik	3,9	3,4	4,0	4,3	4,3	**18**
Thiele	4,0	3,9	4,4	4,4	4,1	**20**
IMPORTANCE WEIGHT	**3,9**	**1,0**	**1,8**	**2,5**	**0,8**	

Looking at how each brands score between both groups, it once again shows, that the optician sector is a market, in which it is difficult to distinguish the brands from each other. The difference between each score is only marginal, and we see no obvious winner. The highest difference in the final score is seen in the young group, where Nyt Syn and Profil Optik only

[179] Example: If we look at service in the group 20-40 as an example, the Score is calculated like this: Score = Service:(3.5x3.2) + Design and Atmosphere:(0.2x2.7) + Assortment:(2.0x2.8) + Accessibility:(2.8x3.8) – Price:(1.5x1.5) = 26

score 20. But as touched upon before, this group does not know or is not that familiar with those brands, so these scores might be misleading.

Now that we have calculated the final score of each brand, we are now able to discuss the positioning strategies that Fishbein introduced. A brand can either focus on being the best performer of one or several attributes or change the degree of importance of the attributes. According to Fishbein, the brand must score as high as possible under each attribute to affect the score positively and gain the highest score among all brands.

The first positioning strategy is to be the best brand performer of one or several important and not least most relevant attributes, which consumers value. We know by now that service is the most important attributes of all five, and based on the consumer analysis, the brands Synoptik and Thiele score high in both groups. If e.g. Louis Nielsen was to approve its total score, the brand should try to improve its service image, which will effect the consumers' perception of that attribute. By getting a higher service score, it will then increase the final score. Though, we do like to stress that it might be a challenge to position a brand upon an attribute that other brands are already delivering strong, and especially if it is an attribute that consumers expect and take for granted, like we saw earlier when analyzing service.

The other positioning strategy focuses on changing the degree of importance of the attributes, and especially of that attribute the brand scores high on. Looking at the importance weights of the different attributes, design and atmosphere is in total ranked as the far less important attribute, but the majority of the participants give most of the brands a high score. This means that brands like e.g. Synoptik and Thiele which score highest on design and atmosphere can take advantage of this gap between a low importance of weight and a high attribute score. These brands should try to increase the level of importance and if they manage, it will increase the final score positively.

We believe that both positioning strategies are relevant and important to have in mind, when we next are to discuss which positions are attractive in the optician market and how to gain that position. Though, we do need to be aware of the fact that these positioning strategies do not necessarily guarantee an attractive position, where all the four criteria are fulfilled.

11.2 Discussion of attractive Optician Retail Brand Positions

As seen in the market analysis, the optician market is a mature market, highly competitive and with similar offerings, just like we predicted beforehand. All the brands, especially Profil Optik, Synoptik, and Thiele 'fight' on the same attributes. It therefore seems difficult to take an attractive position in the optician marked based on the attributes. By competing and communicating on the same attributes, it might be difficult for an optician retail brand to differentiate from the competitors, as the brand's image will 'drown' among the others brands. Now that we have covered different positioning strategies, we will discuss and evaluate which positions are considered obtainable and sustainable.

If we look upon the perceptual map of price vs. quality that we analyzed in our consumer analysis[180], we experienced that all the brands, except from Louis Nielsen, are perceived quite similar and are therefore placed close to each other.

The position that Louis Nielsen holds is by no doubt the one that is most distinguished and none of the others brands are close to this position. Louis Nielsen has challenged the more traditional position and positioning strategies seen in the optician market. The brand has been able to think out of the box, break the value curve and create a Blue Ocean inspired strategy[181]. Louis Nielsen has found a new market position of low cost, and created a demand for low price glasses.

In the perceptual map of price vs. quality, it is obvious that Louis Nielsen is perceived as a low price brand compared to the competitors. The Blue Ocean position that Louis Nielsen has in the optician market is definitely considered attractive. It is differentiated from the competitors, and based on the high store expansion, great customer base and turnover; it must match the customers' need and expectations. Therefore, we find the position relevant and economic attractive as well.

As earlier mentioned, there has been a major development in the retail business in general, and the focus on price has increased heavily. Based on this fact, we believe that the low price position, which Louis Nielsen has conquered, is definitely sustainable too. At the moment, we believe that Louis Nielsen only has one challenge to overcome and if the brand succeeds, it is

[180] Appendix 17: Perceptual Map from TNS Gallup 2009 + Appendix 18: Perceptual Maps from Exercise
[181] W.Chan Kim and Renée Mauborgne (2005) 'Blue Ocean Strategy'

arguable that the brand is on its way to become a ‘category killer’. As we experienced in the consumer analysis, good quality is a very essential factor and based on the perceptual maps, it appears that Louis Nielsen is not providing quality as well as the other brands. That might explain why Louis Nielsen has started to work heavily on increasing and improving its quality image, and if Louis Nielsen manage to increase it quality level, the brand will become unreachable.

In fact, that raises the question about, if this position is actually obtainable for the other optician retail brands to take. If any of the other optician retail brands are to challenge Louis Nielsen and try to obtain the brand’s position, it is necessary to compete on low prices. As price perception is not only affected by the price level, but also all the other attributes, this position cannot be obtained by only communicating its way to it. It requires a radical change in the business model, just like Louis Nielsen did.

Synoptik might be the only brand, who is actually capable of threaten Louis Nielsen. As touched upon in the market analysis, Synoptik has entered the price war and tries heavily to meet the price competition head on with Louis Nielsen. Synoptik has a great force in its high quality level and normally, it should be easier to decrease the price level than to increase the quality level, which is the challenge of Louis Nielsen. Right now, it seems as the two brands are trying to take the same position in the market; low price / high quality, but the question is, who will win the fight? We believe that Louis Nielsen is stronger than Synoptik, and find it more possible that Louis Nielsen will be the winner of those two brands. It seems difficult for Synoptik to be perceived cheap even though the brand has tried to compete on low prices, whereas Louis Nielsen seems to be able to convince consumers that the brand is offering good quality for low prices.

If we consider the general trend of CSR and the ‘green’ focus, it has within optician retailing increased heavily during the last few years. It is a trend that is exploited in all different kind of sectors and business areas and in regard to the optician sector, Nyt Syn is actually trying to differentiate itself by being the first brand to take a CSR oriented position. This position is very communication oriented as the initiative ‘Glasses for Africa’ was mainly launched as an external campaign. In general, we do not find this position very attractive and not least sustainable, as Nyt Syn’s initiative can easily be copied and the position obtained by the other brands.

Finally, we do like to discuss the possibility of taking a high-end position. Competing on high prices and high quality is a position that is seen in basically every sector, and we believe that Thiele and Profil Optik are the brands, which are most able to obtain this position, as both brands are already signaling high-end.

A high-end position in it self is not very attractive, because if Synoptik actually manages to change consumers' perception of the brands price level, it will be very strong positioned, because the brand is still high on quality. As a result, consumers will find it difficult to see why they should choose Thiele and Profil Optik and pay much more for the same quality. Therefore, we believe that it is only possible to have an attractive high-end position if it is also fashion oriented. Furthermore, we believe that the aspect of service and competence need to be improved and innovated in order to deliver an extraordinaire brand experience and create a differentiated store image.

In the market analysis, we experienced that fashion and the trendy aspect of wearing glasses has increased heavily, but though, no optician brands are having a fashion oriented position at this moment. Based on the increasing focus on fashion and following the trend, we believe this position is relevant, and the need for this position exists. However, it is important to stress that this high-end fashion position is only attractive, if the criteria of economic basis, relevance and differentiation are fulfilled. Furthermore, a clear strong brand personality, which matches this position, should be developed. This personality should be relevant to the consumers and be one that consumers can actually identify one self with. In the following chapter, we will look closer and discuss how Thiele can create an attractive position by taking the 'ownership' of a high-end fashion position.

12. Thiele's recommended Position and Positioning Strategy

Given the market situation and the results from our consumer analysis, we are now ready to analyze how Thiele can differentiate its store image and create an attractive position in the optician market. We want to discuss and recommend which positioning strategies Thiele should follow in order to obtain that certain position, and finally we will discuss what need to be implemented and tactical executed to actualize the recommended positioning strategy and thereby how Thiele can differentiate its store image and create the an attractive position.

In the previous chapter, we discussed the possibilities of creating high-end fashion position. We believe that this position is obtainable for Thiele, as the brand already has some high-end characteristics. In order for this position to be attractive, we recommend it to be linked to fashion and trends plus a strong differentiated brand personality, which reflects this high-end fashion position. This is assumed to secure a differentiated position, as none of the competitors are holding a similar position. In terms of relevance, it is not possible for Thiele to be something to every consumer and due to that, Thiele has to be clear about who the brand needs to be relevant for. Finally, we assume that with a proper implementation and tactical execution of the right positioning strategy, this position will be relevant in the eyes of the consumers and thereby economic attractive.

12.1 Target Group Selection

Based on our previous analyses, it appears that Thiele has been trying to target a wide group of consumers, and compete on every attribute in order to reach all segments. If we compare Thiele's situation to Porter's theory, it is arguable that Thiele is close to be stocked in the middle, and in terms of the brand's personality, there are characteristics indicating a 'dull personality'. This situation is due to the fact that Thiele is trying to target every type of consumers, and as we have already mentioned; this is not sustainable.

So the question is, who is it Thiele should target and be relevant for when creating a high-end fashion position? As we in the beginning of the thesis have delimited to focus on segmentation, we will not analyze this subject in details, but only touch upon how Thiele's high-end fashion consumers could be characterized.

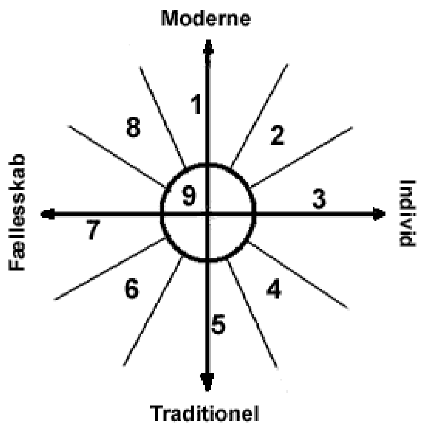
Thiele's high-end fashion position should address consumers with a high income and not being price-oriented. The consumers are quality conscious and do not mind spending money on quality goods and like to keep up with the newest trends not in particular within frames but within fashion in general. In many cases the consumers are driven by social approval in regard to brand selection. Furthermore, it is the emotional type of consumers, who consider finding a pair of glasses as more emotional than a rational purchase. At Appendix 19, we can see that Thiele is now attracting consumers in every age, and we do believe that Thiele's future consumers are to be found among every age group as well.

If we compare this target group description to the segments of 'Gallups Kompas', Thiele's potential customers should be found in the modern related segments and not the traditional.

The modern consumers are well educated and not least highly paid and are to be found in the higher social class. Individually, one third of the segment makes more than 300,000 Danish kroner per year, which is the highest income level of all the segments of 'Gallups Kompas'. The modern consumer are often under fifty years old with a small majority of men, who live in greater Copenhagen. However, there is not a big geographic inequality as can be seen in Appendix 20, where there are no big difference from east and west Denmark among the modern related segments. Finally, the modern consumers prefer good quality and pay attention to new trends and lifestyle products.

Based on the figure below, the most relevant segments are the ones, which have modern related characteristics. These segments are 8 'modern community-oriented', 1 'modern', and 2 'modern individual-oriented'.

Figure 9: Gallup Kompas



Source: http://www.berg-marketing.dk/livsstils_segm.htm

Looking at Appendix 21, it appears that 397,000 consumers in total prefer or choose Thiele once in a while. Among the modern segments, 8, 1 and 2, 123,000 consumers prefer or choose Thiele once in a while. This means that 30 % of the consumers are already represented in the modern segments. In fact, 13 % of the 'modern individual-oriented' segment prefers Thiele, and 11 % of the same segment visit Thiele from time to time. Furthermore, it appears that 'the community-oriented' segment is the one that represents the majority of Thiele's customers today. With 15 % this is the biggest segment, which normally prefers using Thiele. Even though, this segment is not Thiele's target group, this percentage is still good. Just because Thiele is targeting specific segments, that does not mean excluding others.

If we look upon Profil Optik and Synoptik in regard to the segments of Gallup Kompas, we see that more than 50 % of Profil Optik's customers are from the traditional related segments. As for Synoptik, it is impossible to form a pattern in regards to the different segments. Synoptik attracts consumers from every segment, however with a slightly majority of traditional consumers. If Thiele is to differentiate from these two brands, Thiele has to target other segments, which calls for the modern related segments.

Now that we have some indications of which consumers match Thiele's high-end fashion position, we are ready to analyze which positioning strategy Thiele should follow. With the right positioning strategy, Thiele will be able to differentiate its store image and create an attractive high-end fashion position in the market.

12.2 Thiele's Positioning Strategy

Until now, we have experienced that many of the brands, including Thiele, are focusing upon the store image attributes in regard to the positioning strategies. These attributes are closely linked to the product, and therefore we can say that the product is the 'center' of the positioning, and the positioning strategies are defined by specific benefits related to the optician product. In regard to the 'Attribute Positioning Model', Thiele can either focus on being the best performer of one or several attributes or change the degree of importance of the attributes. If Thiele should use attributes for a positioning strategy, the brand must fulfill the three criteria as mentioned earlier: 1) they need to be important to the target audience, 2) a brand can deliver them, and finally 3) a brand can deliver them better than other brands.

In terms of Thiele's high-end fashion position, it is not relevant to be the best performer of all attributes. Price is considered to be an irrelevant factor for high-end segments. Conversely, as Thiele is targeting high-end segments, it is arguable that design and atmosphere is relevant and plays an important role. Based on the result from the 'Attribute Positioning Model', Thiele is one of the brands, which scores the highest on that attribute, and therefore Thiele should focus on the positioning strategy of changing the degree of importance of the attribute. By taking advantage of the gap between a low importance of weight and a high attribute score, Thiele will be able to increase the final score positively.

In regard to service, we experienced that this attribute seems to be the most important, and though the competitors are close and the competition of being the best and score the highest on service are tough, Thiele has to deliver. As Thiele is recommended to create a high-end fashion position, this is an attribute that cannot be ignored. Being a high-end fashion brand calls for a good service level and service experience. Later in this chapter, we will discuss how Thiele can differentiate service and connect it to the high-end fashion position.

If Thiele is to create an attractive high-end fashion position, Thiele need to differentiate its positioning strategy from the competitors. Thiele has to stand out of the crowd, and look for another position benefit that is not linked to the product. Instead we want to recommend a user-oriented positioning strategy[182] to be employed.

In regard to Porter's generic strategies, we believe that Thiele should follow a focused differentiation strategy. As Thiele should target a specific and more narrow segment, and satisfy consumers' differentiated and particular needs, a user-oriented positioning strategy is recommendable. By this we mean that based on whom Thiele should be relevant to, the positioning strategy should match that particular segment. 'The fashionable and quality conscious glass user' could be one example of a user-oriented positioning for Thiele. When Thiele's target group is assumed to be driven by partly social approval in its brand selection, a user-oriented positioning is appropriate to follow. When Thiele address the recommended segments in the positioning strategy, the consumers will be reminded of why they shop at Thiele and what kind of feelings the shopping arouses. By following a user-oriented positioning, we believe that Thiele will be able to differentiate its store image from the competitors and obtain the high-end fashion position with success.

12.3 Thiele's Brand Personality

In addition to the discussion of taking a high-end fashion position and following a user-oriented positioning strategy, we now want to discuss Thiele's brand personality, which should reflect the recommended position. Thiele needs to find a brand personality that is closely linked to a high-end fashion position and remember that this personality only has to be relevant for the consumers, Thiele should target.

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[182] Percy, Larry and Elliot, Richard (2009) 'Strategic Advertising Management' p. 176

In the consumer analysis, we experienced that strong personal competences are extremely high valued, and therefore it is reasonable to align these skills to the brand personality. In terms of Aaker's definition of brand personality, such personal characteristics should be linked to the personality of 'competence', in which traits like reliable, intelligent, and confident are applicable. However, these personality traits are all linked to the attribute of service and as stressed earlier in this chapter, Thiele should not use attributes for a positioning strategy. The same is valid in regard to the brand personality. Thiele cannot be unique based on a 'competence' personality, as it is not differentiated from the competitors. Off course, Thiele has to live up to the consumers' expectations and have a certain standard level, but it should not be used for a brand personality.

Instead, we like to refer to Aaker's personality of 'sophistication', which is considered aligned to a high-end fashion position. This personality is characterized by traits like glamorous, good-looking, upper class and feminine, and the interesting part is that none of these are linked to the attributes. In fact, the personality of 'sophistication' is very much aligned to the type of consumers, which Thiele should target and not least the user-oriented positioning strategy, which we recommend Thiele to follow.

12.4 Implementation of the Positioning Strategy

After having analyzed and presented the recommended positioning strategy and the suggestion of narrowing the target group with a user-benefit focus, this section will treat which new implementations and modifications we recommend Thiele to execute. Thiele's current brand offer is not believed to be sufficiently customized to a high-end fashion position and therefore we will point out some specific areas, which are considered important to improve to successfully obtain a position within the high-end competitive field of the sector.

The following will not represent a full implementation strategy or put forward the entire marketing mix since a complete segmentation and target group definition has not been carried out. Instead, we will present separate recommendations within certain areas, which are found vital through the market and consumer analysis.

12.4.1 Customization toward the Target Group

First of all, it is seen as absolutely key that Thiele tailors the entire brand offer to a specifically defined target group. Thiele has to be much more customized to be the most relevant optician retail brand among the target group. Otherwise the brand is believed to remain perceived as an expensive alternative. Since this thesis only superficially has touched upon which segments seem to have the greatest potential, it is important to stress that our first recommendation is to conduct a thorough segmentation and target group selection. Furthermore, Thiele is recommended to not only define the target group but also to make further in-dept analysis of the consumers within the target group. The analysis should scrutinize the target group preferences in regard of optician retail services and be applied to adjust the offerings. Thiele's overall offering is not considered to be an eye examination and a following selection of a pair of glasses, but instead a complete brand experience. Thiele has to gather insights in regard of how consumers within the target group think and behave all through the decision process and thereby get an understanding of how Thiele can optimize the entire brand experience and influence consumers in the right manner in the different purchase stages.

12.5 Parameter Adjustments and Implementations

In this paragraph, we will put forward some specific recommendations in regard to what need to be implemented by Thiele to differentiate its store image and achieve an attractive high-end fashion position. The recommendations will focus on some separate elements, which are seen as important to fulfill the requirements of being perceived as differentiated and relevant by the target group, and moreover which are seen necessary to be a profitable optician retail brand in the future.

12.5.1 Assortment, Atmosphere and Design

Without knowing the target group's preferences, it is difficult to pinpoint the specific adjustments needed to differentiate Thiele's store image optimally in regard to the assortment and design of the stores. It is though considered to be very important to have a broad and deep selection of the popular designer brands, and it is moreover believed to be important to have new collections on the shelves as regularly as possible to avoid that customers feel that the assortment is out-dated or lack renewal, when visiting the store rather frequently. To be successful in a high-end fashion position, we believe that it is central that Thiele always satisfies consumers, who value being fashionable in regard of their look and very possible visits optician stores more often and have several pairs at a time.

Thiele's rather low-priced collection, the Thiele Basic Eye, is as mentioned earlier targeting the price-sensitive segment, which now is not seen as the proper signal to send to the target group. Instead, it is suggested that the collection should exist with very low focus and with none communication hereof, or it could be marketed as a collection, which makes it possible for the high-end, high spending consumers to easily buy a spare pair of glasses. Many consumers, who only use glasses and not contact lenses, have an extra pair of glasses as a reserve in case they break or wear them when exercising sports or making other psychical activities.

When looking at the atmosphere and design attribute, it is moreover considered critical that the stores signal the recommended brand personality. Even though design and atmosphere did not get a high score from the participants, when choosing a store, it is still considered to have great influence on the brand image and portraying sophistication. Thiele is already perceived as one of the best delivering optician retail brands within this attribute and should, as mentioned earlier, consequently try to influence the target group in regard of enhancing the degree of importance of the attribute among the target group.

Furthermore, if Thiele chooses to communicate very strongly that the brand is the only true high-end fashion and quality alternative, it is essential that the consumers' actual store experience is aligned with the communication. Otherwise the consumers will immediately be disappointed when entering the store, and Thiele would loose credibility and damage the ability to convince the consumers about the brand position. The pivotal touch point in retailing is often the minute a customer cross the entrance of the store, and based on our impression from the consumer analysis, this also seems to apply with optician retailing[183]. We are therefore convinced that Thiele should attach not only importance but also increased effort and resources to this critical moment.

[183] Hogan s., Almquist E. and Glynn s. 2005: Brand-Building: Finding the Touch points that count. P 11-18

12.5.2 The Staff

Besides the atmosphere and design of the store, the staff is also considered to be a very influential part of the 'entrance'- touch point and must therefore not be neglected. In the consumer analysis it was strongly indicated that the participants value being quickly met by a competent staff member, which signals professionalism and shows interest in every customer's need. The staff was especially evaluated on behalf of their credibility, and being too pushy or acting as a rather aggressive salesman is seen as very inappropriate and unsatisfactory. Thiele should be very attentive to these staff behavioral demands and insure that the staff members are employed not only based on their optician skills but also based on the ability to be naturally service-minded. Thiele should in our point of view continuously upgrade the service skills of the staff and create a company culture, which shows appreciation and praises the staff, when the proper problem-solving attitude and in-role behavior are demonstrated. The entire company culture should be build around the brand personality, and the staff should be informed about, how they contribute to signal the personality and how to show brand commitment or brand citizenship behavior[184].

Overall the service experience delivered by the staff seems to be very important in regard to customer loyalty, and if Thiele is set to obtain a profitable high-end fashion position in the market, loyalty and retaining the customer group is considered to be a decisive factor.

12.5.3 Service

In our 'Attribute Positioning Model', it became apparent that service seems almost impossible to apply in regard of being differentiated since it appears to be an attribute, which the consumers experience as more or less fulfilled by every optician retail brand. Service superiority is thereby seen as almost unachievable within the current definition of service. Having excellent service is though seen as highly connected to a high-end fashion position, and we furthermore believe that it would be almost impossible to be perceived as sophisticated without delivering satisfactory services that meet or exceed the target group's expectations.

[184] Burmann, C.; Zeplin, S. (2005): Building brand commitment: A behavioural approach to internal brand management. Page 279-300

Since service is weighted so high in importance among the participants in our focus group interviews, we recommend Thiele to analyze the importance further among the final defined target group, and if service when appropriately tested for significance, shows to have the same high importance as we have seen implied, Thiele need to act upon this. When this is said, we believe that consumers can only express importance or evaluate attributes, which already exists. If service is to be a parameter, where Thiele excels, the brand needs to break the existing service curve and standards and implement new innovative services. One of our recommendations is therefore to look beyond the optician retail sector, and learn from best practice cases in other retail sectors to be inspired and find solutions, which are possible to convert into valuable new optician services.

Offhand it would be interesting to learn from retailers, which have been in front of the development of offering great store experiences and make the single store a brand universe. For instance, the retailer of sports apparel and equipment Stadium has changed all the stores from being standard designed and arranged to be accommodated to its field of retailing and introduced as store arenas[185]. These store arenas integrate different sports elements in the store and thereby make it possible for the customers to actually shoot some hoops and get into the right spirit, when purchasing sports apparels. In addition, Zara is an interesting retailer, which we believe Thiele could learn from in regard to store design and atmosphere. Zara has been remarkable at delivering a differentiated store experience by presenting low or medium priced clothes as exclusive designer wear and by having new collections on the shelves every 3-4 weeks[186]. Zara's ability to quickly respond to new fashion trends and signal fashion and trends in the window display is also believed as worth noticing and get inspirational ideas from[187].

Another area within service, which Thiele is recommended to look closer at, is different loyalty programs. Thiele should examine, which existing programs seem to be the best performing and which would be most appropriate and have greatest effect within optician

[185] http://www.stadium.dk/om-stadium/koncernen/sadan-begyndte-det
[186] http://www.guardian.co.uk/business/2008/aug/12/retail.spain
[187] http://www.businessworld.in/index.php/spanish-season.html + http://www.businessweek.com/globalbiz/content/apr2006/gb20060404_167078.htm?chan=innovation_branding_brand+profiles

retailing. As mentioned several times earlier, Thiele should not be competing on price, but there is no reason for Thiele not to reward the loyal customers and give them special offers, discounts or other incentives to return and buy new glasses. A best practice case among for instance large department stores or fashion clothing stores could probably result in many valuable insights about loyalty programs, customer events, newsletter management and much more.

In addition, the optician retail brands currently seem to be too focused on the competition and copying each other, and having a customer-centric focus appears to be shoved into the background. This should be turned around and every single thing implemented by Thiele, should be based on the relevance of the target group and not originate from the actions by the competitors.

12.5.4 CRM

In our point of view, it would be interesting to expand the scope of customer service by continuously take advantage of customers' data and use the data to appear much more customized and deliver a superior service. Toyota has had great success with the use of a CRM-system, and how the company uses customer information to deliver personalized service. Toyota gathers as much data as possible about the customer, when the order of a car is being finalized and also continuously when the car is checked at a garage. Toyota's staff members are thereby fully updated and have all the needed information when making after sales services. Furthermore, the rich data makes is possible for Toyota to be very personal and relevant to the customers, since the appointed garage at all times is fully aware of the customer's model of car and time went since last car-check. Thanks to Toyota's CRM-system the company manages to be much more upfront with any problems the car-owner might experience, and the customers get the impression that Toyota sincerely cares about the them and always put in an extra effort to help. Toyota has far from the best cars seen from a product quality perspective, but is still the greatest car manufacturer in the world thanks to the ability to deliver satisfactory service and hence the loyal customer base.

Thiele could implement a similar CRM and service approach by further developing and utilizing the already existing CRM-system, which all optician retail brands already have implemented to some degree. When a customer gets an eye examination, all data are typically registered on a computer and used to keep track of how the customer's eyesight evolves over time. Furthermore, a customer of contact lenses often get a reminder or referral every 1-2 years concerning the need of a new eye examination before a new stack of contact lenses are shipped. This system is believed to be expandable in regard to richer information gathering and also to improve Thiele's customer service in regard to glasses.

Every customer's choice of frames and type of spectacle glasses should be registered too, and Thiele should furthermore keep track of the popularity of different designers and shapes of frames. The staff could thereby use the information in the personal guidance of the customer by for instance reminding the customer about the last choice of designer brand or other options and also tell the customer, which other designer brands are popular among customers with a similar taste.

In more and more online services, it has become natural to get further offerings within product categories, when a product is chosen, and a preference has thereby become evident. Amazon has for instance chosen to utilize the gathered customer history to tell the users that a reader of one book also chose to buy another book by e.g. a different author[188]. People with similar taste thereby get reference and recommendations in a very trustworthy matter, just as Apple has done with the Genius service on Itunes[189].

Besides creating a better basis of background knowledge, which can be used to train the staff and optimize the composition of the assortment, we believe that Thiele would be perceived as more customized. Thiele could furthermore utilize the gathered data to send out relevant newsletters about new arrivals within the single customer's preference and thereby give a strong incentive to visit the store more often. If a customer bought a pair of glasses by Tom Ford, the customer should get newsletters about the designer and be informed when new arrivals are available or when a special sale of the designer frames are running.

[188] http://www.amazon.com/b/ref=gw_m_b_corpres?ie=UTF8&node=13786321
[189] http://www.apple.com/itunes/features/#genius

The idea is to keep in touch with the customers and to make sure that they do not get tempted to visit a competitor, and also keep the service delivery tightly linked to Thiele. In almost every sector, it is much more expensive to keep attracting new customers than retaining the one's who already have shown interest and bought something. The brand switchers among the target group should be convinced that choosing a new optician retail brand involves switching cost, and the loyal customers should always be reminded about their 'great' choice of an optician retail brand[190]. In addition, the overall suggestion is based on the thought that Thiele should aim to excel and deliver value within intangible parameters, because succeeding would result in obtaining competitive advantages, which are difficult to copy.

12.5.5 Communication

As touched upon in the market analysis, Thiele has a history of using celebrity endorsement in the different advertising campaigns. Thiele is believed to use endorsements to create both awareness and show some sort of newsworthiness in the advertisements. This is seen as a rightful reason to do since the general advertising noise is considered to be comprehensive. However, we will stress that especially in regard to the celebrities chosen, they themselves carry and portray certain characteristics in the minds of the consumers, and the selection of celebrities should not only be based on the attractiveness but also the associations, which are brought along. Of course these associations should be aligned with the brand personality of sophistication since otherwise the target group might end up being confused about Thiele's brand message, and what the brand stands for.

Since Thiele is recommended to strategically position themselves in regard to user-benefits and not product-benefits, this should be implemented in the overall communication strategy. In closing, Thiele is therefore advised not to communicate about the quality of the service or spectacle glasses, but instead focus on the fashionable and quality conscious consumers, and why Thiele is the right choice as an optician retail brand. Thiele needs to communicate that the brand excels in satisfying the fashionable and quality conscious consumer's particular needs[191]. In other words to be successful in obtaining a high-end fashion position, we believe

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[190] Percy, Larry; Elliott, Richard (2009): Strategic Advertising Management. 3rd Edition. Page 113
[191] Percy, Larry; Elliott, Richard (2009): Strategic Advertising Management. 3rd Edition. Page 177

that Thiele needs to communicate internally and externally, which customers should be in focus and see the brand as differentiated and relevant.

13. Conclusion

The objective of this thesis was to analyze the following problem statement:

How can an optician retail brand, exemplified by Thiele, create an attractive position in a market that is assumed to be highly competitive with similar offerings?

Based on the assumptions of category blurring and the difficulties of distinguishing between the optician retail brands offerings, we wanted to analyze how Thiele can differentiate its store image given the market situation and create an attractive position.

In the market analysis, we experienced that the optician retail sector is a mature market and the competition is very intense with a heavily focus on price. Whereas the optician retail brands like Nyt Syn, Synoptik, Profil Optik and Thiele are basically build upon the same business concept, Louis Nielsen has manage to stand out of the crowd and has applied another business model. In terms of market positions, the majority of the brands, except from Louis Nielsen, seem to hold the same positions and the brands' marketing mix can be said to be quite similar. The brands apply the same parameters to attract consumers' attention. Along with Synoptik, Louis Nielsen is indeed leading the market in terms of high awareness and great customer bases. On the other hand, Profil Optik is the market leader, when it comes to brand turnover and amount of stores.

In terms of the five store image attributes found in the literature review, we can conclude that all five of them play an important role when consumers are choosing an optician retail store. Based on the results from the empiric analysis, service appears to be the most important attribute; especially the importance of sales service is high. The importance of the other attributes were rated quite differently between the two groups, and price is not seen as the most important attribute, like first predicted. However, we make certain reservations of service and not price being the most important attribute, as price and promotion might be an attribute whose affect is more unconscious than others.

In regard to brand personality, we can conclude that Louis Nielsen is the only brand with a clear and consistent personality description. The other brands, especially Nyt Syn and Profil Optik, are characterized with slightly different descriptions, which we believe can be explained by the phenomenon of a 'dull personality' and low awareness. It is arguable that these brands do not have a clear and distinguished positioning strategy, which indeed affects the consumers' perception of the brands. In terms of the focus groups' perception of the five optician brands, we can conclude that the same blurred picture is repeated. Louis Nielsen is once again the most noticeable brand and is perceived as the cheapest optician retail brand with a lower degree of quality and service. The other brands on the other hand are gathered in a cluster and perceived quite similar. Only Thiele is perceived to be slightly more expensive, closely followed by Synoptik. This cluster might be explained by the phenomenon 'stock in the middle'. All the brands, except from Louis Nielsen, seem to follow more than one positioning strategy to meet the consumers' needs and focus on more than one attribute to gain consumers' attention.

Based on what we ascertained in our analysis, we can conclude that the position that Louis Nielsen hold is by no doubt the one that is most distinguished. Due to a blue ocean inspired strategy, Louis Nielsen has found an attractive position, and if the brand manages to increase and improve its quality image, it is arguable the brand is on its way to become a category killer with a position of low price and high quality. Only Synoptik seems able to threaten Louis Nielsen due to its high quality level and by meeting the price level head on with Louis Nielsen. Though, we would like to emphasize that Synoptik will have a hard time being perceived as cheap compared to Louis Nielsen, who needs to convince the consumers of having a good quality for low prices.

Due to an increase of the fashion and trendy aspect of wearing glasses, and since our analyses had shown that differentiation of a store image and brand personality is not exploited in the high-end part of the sector, we can conclude that a high-end fashion position is considered attractive and obtainable for Profil Optik and Thiele, as both brands already have high-end characteristics. This leads us to the conclusion of how Thiele can create an attractive position by being the first to take ‘ownership’ of a high-end fashion position, as none of the other optician brands are holding a high-end fashion position at this moment. In conclusion, we assume that this position is sustainable and economic attractive if Thiele manage to create a strong unique brand personality and implement the right positioning strategy.

In order for Thiele to take a high-end fashion position, Thiele has to target the relevant consumers. Based on our collected knowledge, we can conclude that Thiele has been targeting a wide group of consumers and in regard to this, it is important to state that Thiele cannot be something to every consumer. Thiele needs to be clear about whom the target group is, when taking a high-end fashion position. In terms of the segments of ‘Gallups Kompas’, we can conclude that Thiele’s consumers are to be found in the modern related segments and not the traditional. These segments are more educated and with a higher income plus they prefer good quality and like to follow trends.

In terms of choosing the right positioning strategy, we can conclude that Thiele should not use the store image attributes or the ‘Attribute Positioning Model’ in its strategy because that is what all the other brands do. Thiele needs to differentiate its positioning strategy in order to reach out to the consumers driven by social approval in their brand selection. By utilizing a user-oriented positioning strategy, e.g. ‘the fashionable and quality conscious glass user’, Thiele is able to arouse the target group’s needs and feelings. In terms of Thiele’s brand personality, it has to be aligned with the user-oriented positioning strategy and should therefore be linked to Aaker’s personality of ‘Sophistication’.

Finally, we can conclude that if Thiele is to create an attractive high-end fashion position, some parameter adjustments and implementations have to be actualized. Thiele needs to have a broad and deep selection of popular designer brands and be updated with the newest collection in every store. Furthermore, design and atmosphere of the stores has to be aligned with the personality of sophistication. In continuation, the staff and service are also very influential parts of the store experience, and therefore Thiele should pay much attention to staff behavior and service skills. We recommend Thiele to create a company culture build upon the brand personality and inform the staff, how they contribute to signal sophistication. Moreover, Thiele should consider taking advantage of customers' data and use the information to appear more customized by utilizing existing CRM-systems in ways that have not been seen in the optician sector before. Finally, Thiele needs to align its positioning strategy and brand personality to its communication strategy in order to differentiate the store brand image and obtain the recommended position.

14. Perspective

One of our goals with this thesis was to work with an area within branding, which was rather unfamiliar and new to us. During our education, we have only touched upon the field of retail branding very superficially, and we saw it as an interesting challenge that we would need to start the process of writing our thesis by gaining as much new knowledge as possible about retail branding and how to improve a store image.

From the beginning, we assumed that the optician retail sector was in a mature stage, where price has become the prime competitive parameter. Furthermore, we expected consumers to have difficulties in separating the existing optician retail brands and the brand offerings. Through our analyses, the assumptions more or less became facts, however we did realize that even though the brands prefer using price as a competitive parameter, the participants do not seem to be as responsive to discounts and price as expected. It has been a real challenge to shift our focus from price to the service attribute, and in general we have been challenged when analyzing a retail sector, where the brands appear to focus on something else than what the participants seem to value. However, we once again need to stress the lacking of representative data, which might influence our findings of the importance of price. In addition, we also had to revise our immediate expectation of Thiele and Profil Optik being the closest rivals among the high-end segments. Synoptik was found to be an optician retail brand, which actually competes with everybody due to the mix-positioning strategy and the competitive situation is now seen as more complex than first imagined.

As a consequence of the high complexity, it would have been very interesting to have had a closer contact with the marketing department at Thiele. A better insight, in how the company defines the Thiele brand and the future brand challenges, might have led us in other directions or made us aware of some specific issues, besides what we ourselves picked up in the literature review and the analyses. Moreover, internal insights and discussions with the employees would probably have made us able to work more deeply with the store image attributes and come up with more specific recommendations.

One element, which has been left out in this thesis due to the lack of contact to Thiele, is the fact that Thiele's stores are partly company owned and partly run by franchisees. Since it was not possible to discuss this ownership structure with Thiele's marketing employees, we were not able to gain knowledge about whether the two different ownerships create some conflicts or perhaps differences in how the stores are run on a daily basis. Whether or not the delivered store experience is inconsistent from store to store has not been analyzed in any way, but we still want to stress the importance of consistency, and that this should be given attention from Thiele. The consequence of not monitoring inconsistency could be that some stores in generally end up lacking too much behind the appropriate standards for a Thiele store, and gaps between the actual state and the goal could thereby be more comprehensive than immediately imagined.

In our market analysis, we put all our efforts in thoroughly analyzing the five biggest national brands and create knowledge about the current positions, which these five brands seem to uphold. As we along the way got convinced that Thiele should create a high-end fashion position, we would have preferred looking closer at the smaller chains or single independent high-end optician stores. Our recommended brand position for Thiele will not only have to compete with Profil Optik, Synoptik and partly Nyt Syn, but will also meet competition from many independent optician stores, which have had success with a niche offering within fashion and quality. With the benefit of hindsight, we would have chosen to look closely into this competitive aspect to gather information about the strength of these opticians both in regard to the store image attributes and how much loyalty, the retailers have been able to build.

Finally, when we set the goals for and prepared our consumer analysis, we would have liked to be more forward-looking in regard to the later analysis and discussions of possible positioning strategies. In the focus group interviews concerning the store image attributes and the five optician retailer brands, we should have incorporated the right scale for the 'Attribute Positioning Model' and been more successful in gaining information from the participants regarding the different scores and how they perceived the scale. The consequence of the results being relatively insufficient and the final scores being too narrow influenced our analysis of positioning strategies, which ended up only being rather hypothetical and inadequate.

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Marketing Communication Management - Copenhagen Business School

10th September 2010

Appendix

Authors:

Christine Dissing, [redacted] & Nini Andersen, [redacted]

Supervisor:

Jens Thrane-Møller; Extern, within Advertisement

Master Thesis

120 Normal Pages and 272,165 STU

Appendix 1: Awareness of and using the different Optician Retailers

Undersøgelse: Index DK/Gallup Marketing/Mærke lang (B) 2h 2009
Univers ('000): 4.717
Delunivers: Alle personer <Alle perioder>
Delunivers størrelse ('000): 4.717
Målgruppe: Alle personer
Målgruppe størrelse ('000): 4.717   Stikprøve: 2.028
Procent: 100%

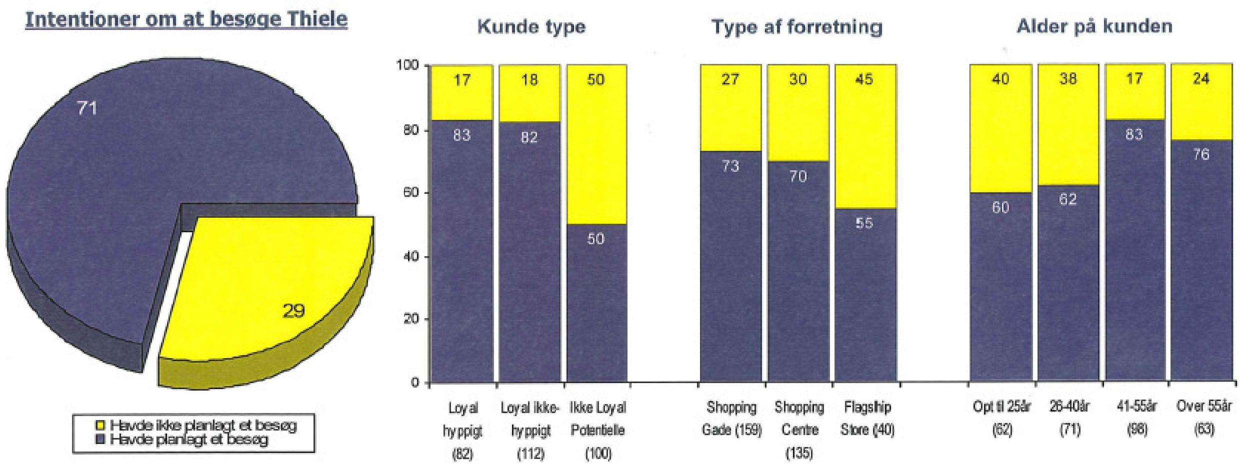
			20-40 med brille	40+ med brille
	Total:	Opregnet000	557	2.199
		Stikprøve	152	1.311
		Lodret%	100	100
Optikkæde - Louis Nielsen	Plejer at bruge	Opregnet000	132	193
		Stikprøve	30	145
		Lodret%	24	9
	Bruger af og til	Opregnet000	38	147
		Stikprøve	11	99
		Lodret%	7	7
	Brugt tidligere men ej mere	Opregnet000	53	178
		Stikprøve	16	104
		Lodret%	9	8
	Har aldrig brugt	Opregnet000	312	1.202
		Stikprøve	86	735
		Lodret%	56	55
	Ved ikke	Opregnet000	12	126
		Stikprøve	3	51
		Lodret%	2	6
	Kender ej kæden	Opregnet000	11	352
		Stikprøve	6	177
		Lodret%	2	16
Optikkæde - Nyt Syn	Plejer at bruge	Opregnet000	27	117
		Stikprøve	6	63
		Lodret%	5	5
	Bruger af og til	Opregnet000	45	162
		Stikprøve	12	86
		Lodret%	8	7
	Brugt tidligere men ej mere	Opregnet000	65	160
		Stikprøve	19	95
		Lodret%	12	7
	Har aldrig brugt	Opregnet000	323	960
		Stikprøve	88	628
		Lodret%	58	44
	Ved ikke	Opregnet000	11	93
		Stikprøve	4	44
		Lodret%	2	4
	Kender ej kæden	Opregnet000	87	707
		Stikprøve	23	395
		Lodret%	16	32
Optikkæde - Profil Optik	Plejer at bruge	Opregnet000	40	235
		Stikprøve	20	159
		Lodret%	7	11
	Bruger af og til	Opregnet000	56	261

		Stikprøve	16	152
		Lodret%	10	12
	Brugt tidligere men ej mere	Opregnet000	69	302
		Stikprøve	24	193
		Lodret%	12	14
	Har aldrig brugt	Opregnet000	370	988
		Stikprøve	84	619
		Lodret%	66	45
	Ved ikke	Opregnet000	11	122
		Stikprøve	4	56
		Lodret%	2	6
	Kender ej kæden	Opregnet000	11	291
		Stikprøve	4	132
		Lodret%	2	13
Optikkæde - Synoptik	Plejer at bruge	Opregnet000	103	366
		Stikprøve	26	197
		Lodret%	19	17
	Bruger af og til	Opregnet000	47	358
		Stikprøve	16	222
		Lodret%	9	16
	Brugt tidligere men ej mere	Opregnet000	176	482
		Stikprøve	44	317
		Lodret%	32	22
	Har aldrig brugt	Opregnet000	215	686
		Stikprøve	60	441
		Lodret%	39	31
	Ved ikke	Opregnet000	10	110
		Stikprøve	3	56
		Lodret%	2	5
	Kender ej kæden	Opregnet000	5	197
		Stikprøve	3	78
		Lodret%	1	9
Optikkæde - Thiele	Plejer at bruge	Opregnet000	42	141
		Stikprøve	12	75
		Lodret%	8	6
	Bruger af og til	Opregnet000	25	188
		Stikprøve	11	102
		Lodret%	5	9
	Brugt tidligere men ej mere	Opregnet000	72	215
		Stikprøve	21	127
		Lodret%	13	10
	Har aldrig brugt	Opregnet000	375	1.100
		Stikprøve	91	707
		Lodret%	67	50
	Ved ikke	Opregnet000	9	108
		Stikprøve	2	47
		Lodret%	2	5
	Kender ej kæden	Opregnet000	34	445
		Stikprøve	15	253
		Lodret%	6	20

Appendix 2: Survey by Thiele. – 294 Exit interviews were made in August 2007

71% af besøg er planlagt. Potentielle yngre kunder er de mest sandsynlige impuls kunder.

- Thiele er en stærk 'destinations' forretning



5

Appendix 3: Awareness and Considerations to visit the Optician Retailers - East vs. West

Undersøgelse: Index DK/Gallup Marketing/Mærke lang (B) 2h 2009					
Univers ('000): 4.717					
Delunivers: Alle personer <Alle perioder>					
Delunivers størrelse ('000): 4.717					
Målgruppe: 20+ med brille					
Målgruppe størrelse ('000): 2.756 Stikprøve: 1.463					
Procent: 58%					
			Total	Reg0. regioner	
				Øst for Storebælt	Vest for Storebælt
Total		Opregnet000	2.756	1.243	1.513
		Stikprøve	1.463	617	846
		Lodret%	100	100	100
Optikkæde - overveje ved nykøb Louis Nielsen	Overveje, kender kæden	Opregnet000	778	350	428
		Stikprøve	455	192	263
		Lodret%	28	28	28
	Ej overveje, kender	Opregnet000	1.615	699	916
		Stikprøve	825	334	491
		Lodret%	59	56	61
	Ej overveje, kender ej	Opregnet000	362	194	168
		Stikprøve	183	91	92
		Lodret%	13	16	11
Optikkæde - overveje ved nykøb Nyt Syn	Overveje, kender kæden	Opregnet000	345	131	214
		Stikprøve	210	75	135
		Lodret%	13	11	14
	Ej overveje, kender	Opregnet000	1.618	713	904
		Stikprøve	835	329	506
		Lodret%	59	57	60
	Ej overveje, kender ej	Opregnet000	794	399	395
		Stikprøve	418	213	205
		Lodret%	29	32	26
Optikkæde - overveje ved nykøb Profil Optik	Overveje, kender kæden	Opregnet000	662	273	389
		Stikprøve	410	151	259
		Lodret%	24	22	26
	Ej overveje, kender	Opregnet000	1.791	831	960
		Stikprøve	917	399	518
		Lodret%	65	67	63
	Ej overveje, kender ej	Opregnet000	302	139	163
		Stikprøve	136	67	69
		Lodret%	11	11	11
Optikkæde - overveje ved nykøb Synoptik	Overveje, kender kæden	Opregnet000	939	516	423
		Stikprøve	472	238	234
		Lodret%	34	42	28
	Ej overveje, kender	Opregnet000	1.614	671	944
		Stikprøve	910	355	555

		Lodret%	59	54	62
	Ej overveje, kender ej	Opregnet000	202	56	146
		Stikprøve	81	24	57
		Lodret%	7	5	10
Optikkæde - overveje ved nykøb Thiele	Overveje, kender kæden	Opregnet000	497	303	193
		Stikprøve	260	155	105
		Lodret%	18	24	13
	Ej overveje, kender	Opregnet000	1.780	813	968
		Stikprøve	935	398	537
		Lodret%	65	65	64
	Ej overveje, kender ej	Opregnet000	479	127	352
		Stikprøve	268	64	204
		Lodret%	17	10	23

Appendix 4: Invitation to participate in Focus Group Interview

April 2010

Invitation til fokusgruppeinterview

Vi er to studerende fra Handelshøjskolen, København som er i gang med vores kandidatafhandling inden for emnet marketing og kommunikation. Til denne opgave har vi brug for hjælp og henvender os derfor til dig.

Vores opgave har fokus på den danske optiker branche og dens nuværende konkurrencesituation. I den sammenhæng, ønsker vi at skabe en forståelse for kundens beslutningsproces, når kunden eksempelvis skal købe nye briller og dermed skal vælge butik eller kæde.

Til indsamling om viden herom har vi brug for din hjælp. Du skal sammen med ca. 8 andre personer være med i et fokusgruppeinterview, hvor der stilles en række spørgsmål som gruppen skal diskutere i fællesskab.

Dette arrangement vil finde sted:

Tirsdag d. 20 april kl. 19.00 - 21.00 på adressen Vimmelskaftet 47, 2.sal, 1161 Kbh. K

Vi håber, at du har lyst og mulighed for at deltage, og der vil naturligvis bliver serveret lidt forfriskninger undervejs.

Vi vil meget gerne kontaktes på et af nedenstående telefonnumre eller mails senest fredag d. 16 april med svar på om du har lyst til at deltage. Hvis du har spørgsmål eller ønsker yderligere information om arrangementet, er du også meget velkommen til at kontakte os.

Med venlig hilsen

Christine Dissing – tlf.: 22 61 68 18 – mail: christine3s@hotmail.com
Nini Andersen – Tlf.: 40 57 56 49 – mail: niniandersen@hotmail.com

Appendix 5: Questionnaire – Focus Group Interview

19.05: Briefing
- Velkomst og kort præsentation af os
- Formål med aftenen og programmet
- Understregning af behovet for ærlighed – plads til alle svar og kommentarer
- Accept af optagelse på diktafon

19.10: Præsentation af deltagerne
(navn, alder, beskæftigelse, brug af brille – hverdags/læsebrille og hvor lang tid)

19.20: Beslutningsproces og valgkriterier ift. Butik / Kæde
- Deltagerne bedes fortælle om deres valgkriterier når de vælger butik
    - Hvorfor, uddybning af valgkriterier
    - Deltagerne spørges til hvad der en tilfredsstillende butiksoplevelse
    - Eks: er der andre elementer I kan komme i tanke om?

- Deltagerne spørges til hvad der er afgørende for om I kommer igen til samme kæde?
  Hvad skal der til før I vil anbefale butikken til andre?

19.40: Attributes

- Hvad er god service for jer?
    - Personale service: hurtig, professionel (Ekspertise vs. Mode), service minded betjening
    - Servicepolitik
    - Online service – bookning af ny tid, se udvalget, online tlf. Service

- Hvor meget betyder prisen?

Vil I gerne betale for ekstra / god service?
Tilbud – holder I øje med tilbud,, kan I blive lokket af gode tilbud?
Nu hvor vi taler om pris, er det ift. mærker/design eller er det også fra optiker kæde til kæde?
Synes I det er nemt at gennemskue priser og prisforskelle mellem de forskellige optiker kæder.

- Er det vigtigt for jer med et bredt udvalg?

Forskellige mærker
Udvalg inden for samme mærke
Udvalg inden for prisklasser / niveauer
Går I tit efter bestemte brillemærker?

- Har beliggenhed betydning for valg af butik eller kæde?

Vælger I altid jeres nærmeste optiker? (lige rundt om hjørnet)
I hvilken sammenhæng besøger i en optikerkæde (ifm shopping, kun til det formål)

- Tænker I over butikkens indretning og atmosfære?

Fx lys, farver, interiør, overskuelighed,
Eksklusiv

- Alle deltagere bedes prioritere de fem attributes?
    - Uddele ark – (1-5)

Generel diskussion (ift. touch points)

- Interesserer I jer for brillemoden?
- Ligger I mærke til kampagner ved outdoor, magasiner, TV
- Hvis I skulle vælge en ny optiker, hvordan ville I så søge information (eks. venner, kollegaer, internettet andet)

20.10: Diskussion af optiker brands

- Hvilken optiker kæde har I senest besøgt?
    - Er det jeres foretrukne kæde?

- Deltagerne bedes skrive et par ord om de forskellige brands på hver deres ark (hvad falder jer ind når I hører brand X?)
    - Louis Nielsen
    - Nyt Syn
    - Profil Optik
    - Synoptik
    - Thiele

- Deltagerne for udleveret ark med ca. 50 tillægsord og skal udvælge 3-5 til hvert brand

- Deltager bedes karakterisere de forskellige brands (hvis brand X var en person, hvordan ville I så karakterisere denne?)
    - Louis Nielsen
    - Nyt Syn
    - Profil Optik
    - Synoptik
    - Thiele

- Er der nogen kæde, som skiller sig ud fra de andre – meget anderledes?
- Er der nogen kæder, som I har svært ved at skelne fra hinanden

- Deltagerne får udleveret et ark, hvori de bedes evaluere alle brands i forhold til attributes på en skala fra 1-5

20.25: Øvelse – position maps

- Deltagerne bedes placeres de forskellige brands ud fra akserne:
    - Pris vs. Service
    - Pris vs. kvalitet
    - Pris vs. Udvalg
    - Service vs. Udvalg

Deltager får god tid til at rykke rundt og der tages billede efter hver øvelse.

21.00: Afrunding og tak for i dag

Appendix 6: Prioritizing the 5 Attributes

Du bedes i dette ark prioritere, hvor vigtige de nedenstående elementer er for dit valg af optiker. (Du må gerne undlade et element, hvis det er helt uden betydning)

Skriv 1 – 5, hvor 1 er det vigtigste.

Service _________

Pris _________

Indretning og Atmosfære _________

Udvalg _________

Beliggenhed _________

Appendix 7: Evaluation of the Optician Retailers

Du bedes i dette ark sætte kryds ud for hvert mærke i alle 5 spørgsmål.
1 = Meget Ringe /Ikke Tilfredsstillende, 5 = Meget Godt / Meget Tilfredsstillende

Hvordan oplever du serviceniveauet for de følgende mærker?

	1	2	3	4	5
Louis Nielsen	☐	☐	☐	☐	☐
Nyt Syn	☐	☐	☐	☐	☐
Profil Optik	☐	☐	☐	☐	☐
Synoptik	☐	☐	☐	☐	☐
Thiele	☐	☐	☐	☐	☐

Hvordan oplever du butikkernes indretning og atmosfære for de følgende mærker?

	1	2	3	4	5
Louis Nielsen	☐	☐	☐	☐	☐
Nyt Syn	☐	☐	☐	☐	☐
Profil Optik	☐	☐	☐	☐	☐
Synoptik	☐	☐	☐	☐	☐
Thiele	☐	☐	☐	☐	☐

Hvordan oplever du udvalget hos de følgende mærker?

	1	2	3	4	5
Louis Nielsen	☐	☐	☐	☐	☐
Nyt Syn	☐	☐	☐	☐	☐
Profil Optik	☐	☐	☐	☐	☐
Synoptik	☐	☐	☐	☐	☐
Thiele	☐	☐	☐	☐	☐

Hvordan er dit helhedsindtryk af kvaliteten for de følgende mærker?

	1	2	3	4	5
Louis Nielsen	☐	☐	☐	☐	☐
Nyt Syn	☐	☐	☐	☐	☐
Profil Optik	☐	☐	☐	☐	☐
Synoptik	☐	☐	☐	☐	☐
Thiele	☐	☐	☐	☐	☐

Hvordan oplever du prisniveauet for de følgende mærker?

	Meget Lavt				Meget Højt
	1	2	3	4	5
Louis Nielsen	☐	☐	☐	☐	☐
Nyt Syn	☐	☐	☐	☐	☐
Profil Optik	☐	☐	☐	☐	☐
Synoptik	☐	☐	☐	☐	☐
Thiele	☐	☐	☐	☐	☐

Hvordan oplever du tilgængeligheden af de følgende mærker?

	Meget Lavt				Meget Højt
	1	2	3	4	5
Louis Nielsen	☐	☐	☐	☐	☐
Nyt Syn	☐	☐	☐	☐	☐
Profil Optik	☐	☐	☐	☐	☐
Synoptik	☐	☐	☐	☐	☐
Thiele	☐	☐	☐	☐	☐

Appendix 8: Brand Characteristics – Handout

Du bedes sætte kryds ud for de ord, som du synes passer til mærket. (Find gerne 3-5 ord til hvert mærke.)

	Louis Nielsen	Nyt Syn	Profil Optik	Synoptik	Thiele
Familieorienteret					
Ærlig					
Reel					
Original					
Glad					
Venlig					
Modig					
Kvalitetsbevidst					
Detaljeorienteret					
Trendy					
Spændende					
Energisk					
Fræk					
Ung					
Støvet					
Kedelig					
Gammel					
Down-to-earth					
Unik					
Up-to-date					
Innovativ					
Uafhængig					
Sikker					
Intelligent					
Teknisk					
Succesfuld					
Leder					
Selvsikker					
Value for money					
Billig					
Discount					
Eksklusiv					
Glamuriøs					
Charmerende					
Feminin					
Maskulin					
Blød					
Cool					
Forsigtig					
Usikker					
Professionel					
Erfaren					
Faglig					
Imødekommende					

Appendix 9: Transcription of Focus Group 1: 20.04.2010

Deltagere:
Rasmus: 30 år, Key account manager, Briller foran skærmen, Brugt briller i 2 år
Sara: 23 år, studerende på CBS, Bruger altid briller, Brugt briller i 2-3 år.
Mette: 27 år, studerende på universitetet, Bruger briller til at se langt med, Brugt briller i 2 år.
Morten: 33 år, Chief Technology Officer, Briller Brugt briller i 13 år
Maria: 24 år, Butiksassistent, Bruger delvis briller, Brugt briller i 8 år
Tehneyat: 27 år, Kommunikations medarbejder hos IRCT, Bruger delvist briller, Brugt briller i 8 år

Beslutningsproces og valgkriterier ift. butik / kæde

Sidste gang I var hos en optiker, hvorfor valgt I så denne butik?

Maria: Ja, det var så sent som i dag, jeg skulle ned og have rettet mine briller til. De var blevet alt for løse og faldt ned på min næse, så det var bare en lille ting.

Sara: Jeg har lige været af sted for at par dage siden, og har fået de briller jeg har på nu. Jeg valgte en anden kæde, end jeg oprindelig har brugt tidligere, fordi de havde et godt tilbud. Faktisk var det fordi min veninde og hendes kæreste, de bruger begge to briller og hos Louis Nielsen kunne de samle nogle point til at få rabat. Fordi det er helt nyt at jeg skal bruge briller og vende mig til at have dem på hele tiden, så var jeg ikke villig til at bruge så mange penge. Jeg kunne lige pludselig få et par briller med stel, glas og med bygningsfejl for kun 250 kr. og det var jeg super glad for. Men jeg har ellers gået hos Synoptik før.

Rasmus: Jeg var i en optiker i Thailand for 3 uger siden, og det var primært for at forny mit stel. Og fordi både briller og stel er en tredjedel af prisen end herhjemme. Men det endte ikke i noget køb. – Det var på designer briller.

Morten: Det var Synoptik, den lå tættest på og jeg har det med at smide ting væk, så jeg stod og manglede nogle læsebriller. Så det det skulle bare gå hurtigt. Jeg var så ikke lige opmærksom på, at jeg ikke fik dem med med det samme. Det var helt tilfældigt og fordi den lå tættest på.

Mette: Jeg var sidste år i Synoptik, fordi jeg skulle have nogle solbriller med styrke, og der havde jeg været før. Mine briller fandt jeg i Nykøbing Falster, men i den butik i København, hvor jeg fik dem leveret, den vendte jeg så tilbage til for at købe de her solbriller, fordi det er tættest på mig.

Tehneyat Jeg har konsekvent brugt Synoptik, fordi jeg har studeret i England i flere år, og der havde vi en rigtig god optiker, som hedder Specsavers, og de har samme logo og grønne farve som Synoptik, så der må være en forbindelse mellem de 2. Hende der tjekker mine øjne er enorm sød, og det er også rart når ens optiker kender ens historie og ved, hvad det handler om.

Da I var der sidst, var der så noget som gjorde oplevelsen til noget særligt? Noget rigtig godt eller tilfredsstillende?

Maria: Utroligt, nok har jeg været hos den samme Thiele butik 3 gange i den seneste uge for at få tilpasset mine briller. Den første gang og anden gang blev de rettet til så de endte med at gnave bag ørerne. Men i dag stod der så en mand, som virkede meget mere kompetent, uden at lyde fordomsfuld mod unge piger. Så var det som om at det er gået lidt for hurtig de andre gange, måske er det også min egen skyld. Men ham i dag gav sig rigtig god tid og rettede til helt fra bunden. Så jeg gik der fra med følelsen af at nu var de på plads og nu var de iorden.

Er der andre ting, som er med til at gøre et besøg hos en optiker en god oplevelse?

Morten: Det er meget vigtigt, at man får en god fornemmelse af optikeren. I og med det ikke er noget man selv har styr på – man aner ikke, om det de siger, er rigtigt. Hvis man ikke har tiltro til den person som står der, så er det meget svært, synes jeg, det er jo en væsentlig sum penge man skal lægge hos dem. Det kan det i hvert fald være.

Så det er deres faglige kompetence?

Morten: Jeg ved ikke, om det er om det er deres faglige kompetence, men hvis de ikke udstråler, at de ved, de har styr på de ting, de laver, så synes jeg, det er svært. Det er jo et område, hvor man jo ikke rigtig kan tjekke op på, om det de laver er rigtigt. Modsat alle muligt andre servicefag. Så det er super vigtigt.

Mette: Det er også vigtigt, om de virker reelle. Altså om de er ude på at sælge de briller, fordi de gerne vil sælge eller om de rent faktisk gerne vil hjælpe. Der hvor jeg har været, har hende der hjalp været meget diskuterende, fx om jeg skal have flydende overgang. Her var hun meget forklarende, og lod mig selv tage beslutningen. Og sagde ikke sådan: At den her brille skal du ha', sådan er det. Så nej man blev ikke påduttet noget. Det gør at jeg kommer igen hos Synoptik. Nu har man haft en god oplevelse der, og så kommer man igen dertil.

Så det er meget personalet som kan afgøre, om oplevelsen bliver god eller ej?

Mette: Ja meget for mig.

(De andre ved bordet nikker med og udviser enighed)

Sara: Ja jeg kan i hvert fortælle, at min historie er, at jeg gik ned til min nærmeste Synoptik. De ligger jo over det hele - Det er fandme som 7-11 altså. De anbefalede, at jeg gik til en øjenlæge, fordi de følte sig ikke kompetent nok til at kunne bestemme det, de ville gerne jeg fik foretaget hele muligtjavsen og det gjorde jeg så. Det synes jeg i hvert fald er dejligt, at de netop ikke prøver at pådutte mig noget, og bare siger: prøv dem her og se om de fungerer. Men de var reelle nok. Men da jeg så gik ned til Synoptik igen, da valgte jeg en anden butik inde i byen, fordi de havde et større udvalg. Men hende som så stod der, selvom hun var venlig, så prøvede hun at pådutte mig to par briller. Netop fordi hun var af den overbevisning, at jeg ikke skulle have flydende overgang, at det var jeg for ung til. Men ville jo så gerne sælge mig to par briller og det var jeg ikke sådan helt tilfreds med for øjenlægen havde jo lige fortalt noget andet og det behøvede jeg ikke. Men nu er jeg meget godt tilfreds, så personalet har rigtig meget at gøre med det, men som Mette siger, er det fordi man bliver i tvivl om, er det fordi de gerne vil sælge en noget og har man nu reelt brug for de her briller eller? Og som studerende får man jo at vide, at man lige så godt kan vende sig til at købe briller hele tiden, fordi vi anstrenger vores øjne.

Er der nogle af jer som har haft en dårlig oplevelse?

Mette: Ikke andet end, at de ikke altid har været så venlige. Da jeg skulle have briller gik jeg ind i forskellige butikker og kiggede rundt for at finde hvad der passer til mig, og der var der helt sikkert nogle som ikke var så service-minded, hvor man stod sådan lidt for sig selv. Mens hos Synoptik, der var de der med det samme. Det var også derfor jeg bliver ved med at komme tilbage til dem.

Maria: Den Thiele forretning jeg kommer ved, der har jeg i et års tid kraftigt overvejet, om jeg skal skifte til en anden. Fordi jeg synes de roder meget rundt i deres ting. Når jeg skal hente linser osv., så tager det langt tid at finde tingene frem, de render fra det ene rum til det andet, og de har ikke styr på tingene bag skranken. Der er mange ting som ikke fungerer lige med det samme, og de ved jo man kommer, for de har jo selv kaldt én ind fordi tingene er kommet hjem.

Når du overvejer at skifte, tænker du så, at du vil skifte fra Thiele til en anden kæde eller?

Maria: Jeg har været ved 3 forskellige Thiele butikker, så jeg ville bare fortsætte et andet sted, men stadig hos Thiele.

For at opsummere hvad er det så I siger der er vigtigt for en god oplevelse?

Mette: Service-minded personale

Morten: Og det med tiltro til optikeren

Sara: Jeg overvejer kraftigt at gå til Louis Nielsen næste gang jeg skal have briller. Selvom jeg fik et par rigtig fede briller hos Synoptik, som var et fint brand. Så er det virkelig gået op for mig, at man godt kan få et par briller til billige penge. Lige nu har jeg bundet mig til at betale i 2 år for mine læsebriller, og ja nu har jeg så fået en brille, som jeg egentlig skal gå med hele tiden til kun 250 kr. Så kan jeg godt sidde og overveje om det virkelig er det værd næste gang. Så kan jeg købe et par dyrere briller hos Louis Nielsen næste gang og så få et par gode briller.

Så det er de samme ting, som er vigtig for at I vil anbefale butikken til andre?

Maria: Ja, at de har tid til en og flair for at finde den stil som man egentlig søger, så man får den der passer til en.

Attributes:

Er der andre ting omkring service som er vigtige for jer?

Tehneyat: Tid, overskud. At de siger, i øvrigt har du tænkt på det her.. Man overser jo selv let et eller andet specielt, at man har glemt noget ift. ens bygningsfejl eller lignende.

Hvad med i forhold til mode? Om en brilleform passer til ansigtet – er det vigtigt?

Mette: Rigtig meget for mig. Især hvis man kommer alene, så står man og synes det ser meget godt ud, men når man så kommer hjem, så fortryder man lidt og kommer i tvivl. De skal lige sige, om de passer eller ej.

Sara: Hende jeg snakkede med, hun sagde, at jeg skulle have transparente briller og det var absolut ikke min stil. Og selvom jeg insisterede på, at det ikke var mig. Så brugte hun det argument, at det var det nyeste. Og der synes jeg faktisk, det er ikke det, jeg har lyst til. Så kan det blive lidt irriterende – jeg så dum ud, det kan jeg lige så godt sige. Altså, man vil gerne have rådgivning, men det skal heller ikke være sådan, at det er det nyeste ergo skal du have de her, fordi du skal passe ind i den kasse, som vi alle sammen skal passe ned i.

Rasmus: Men hun giver dig jo i hvert fald muligheden.

Sara: Ja, det er selvfølgelig rigtigt.

Hvad med servicepolitik og garanti – er det en del af god service?

Rasmus: Jamen er det ikke standard, for eksempel med 2 års garantireglen. Det skal de have.

Maria: Det tager man lidt som en selvfølge. Det har man fået indprintet, fordi det siger de alle sammen for at få kunder.

Rasmus: Det skal de bare have og leve op til. For eksempel har Kia nu 7 års garanti på deres biler, men derfor købte jeg jo ikke en bil alligevel.
Det er så lidt usædvanligt. Og hvis en optiker valgte at sige, at der er 10 års eller fuld garanti på deres briller, så ville man måske lægge mærke til det.

Sara: Men jeg mener alligevel, jeg fik at vide, at jeg skulle være opmærksom på, om det var de rigtige briller jeg valgte, fordi de var skræddersyet til mig. Så jeg havde 8 uger til at tilpasse mig. Når de uger var gået, så var det ligesom, så kunne jeg ikke få dem byttet, eller hvis det var de gik i stykker. Der mente jeg, at jeg skulle tegne en forsikring. Det var oversagen til at jeg skulle tegne den forsikring, som jeg gjorde. For jeg mener, hun var meget insisterende på, at jeg nu fik brugt og prøvet brillerne, for når de 8 uger var gået, så kunne jeg ikke længere bare bytte om mere.

Morten: Der er nok forskel på, hvornår du så kan få helt nye briller eller hvornår de begynder at reparerer på dem.

Hvad med online service? Finde I information på hjemmesiderne?

Morten: På hjemmesiden – nej det gør jeg ik.

Mette: Jeg tror aldrig, jeg har været inde på nogle af dem.

Maria: Jeg har tjekket, om jeg har kunnet for nogle briller eller linser billigere.

Morten: Man skal jo alligevel ned og prøve brillerne, det er kun med linser det kunne give mening, så man går kun på hjemmesiden for at finde adressen på den nærmeste butik. Det er svært at købe online.

Maria: Man tænker slet ikke på at tjekke briller ud på nettet.

Rasmus: Jeg har været inde og kigge, fordi jeg fandt et par Tom Ford briller hos Thiele og jeg fandt dem så til 800 kr. billigere på nettet, og overvejede bare at bestille stellet og så gå ned og få glas i hos den nærmeste optiker.
Men så valgte jeg bare at gå direkte i butikken også for at få den gode service.

Morten: Det er en god pointe, jeg har faktisk ikke tænkt over, at man kan gøre det på den måde.

Rasmus: Der er rigtig mange penge at spare – især på stel.

Hvor meget betyder prisen for jer, når I skal til at vælge nogle nye briller?
Tænker I over det bevidst, når I vælger?

Rasmus: Ja det vil jo have en eller anden indflydelse.

Mette: Nu har jeg kun haft briller et par år, så jeg er først begyndt at tænke på at få nye nu her. Men jeg er sådan mere fokuseret på, om de passer til mit ansigt, og så er det ikke så vigtigt, at det er Gucci eller et eller andet. Jeg har sat de her penge af til, at det skal være nogle briller, som jeg bliver glad for. Det nytter ikke noget, hvis jeg får købt nogen, jeg ikke bliver glad for. Mere på den måde, at jeg tænker over det inden jeg går hjemmefra.

Tehneyat: Man tager brillen det billigste sted, hvis de er helt ens. Men service kommer meget indover, og man vælger det sted, hvor man føler sig mest tryk.

Maria: Jeg kigger faktisk overhovedet ikke på prisen. Det skal bare være de rigtige, det er det vigtigste. Selvfølgelig kan de godt blive ekstremt dyrt, men så går man måske lidt mere på kompromis med glassene.

Tehneyat: Og så er det så sjældent, at man køber briller, så man går bare lidt automatisk ind til den, som man var til sidst og er vant til.

Maria: Det er et meget velovervejet køb, det er ikke lige som med et par sko eller sådan noget.

Så I bliver ikke sådan lokket af gode tilbud og priser?

Rasmus: Jo, det tror jeg godt, man kan. Det er sådan lidt, at man har i hovedet at man skal bruge 1000 kr. på et par jeans, og så ender man med at bruger 1400. kr. Jeg tror, det er det samme købsmønster, når du køber briller. Du har en bevidsthed om, at du skal bruge 3000 kr. på et par briller og så ender du med at bruge 5000 kr., fordi de sidder pisse godt, og du føler dig tilpas. Den følelse har jeg i hvert fald haft

(De fleste udtrykker deres enighed)

Sara: Men du bliver jo alligevel indenfor den samme butik. Det er ikke fordi du sådan shopper rundt mellem forskellige butikker. Eller jeg gør det i hvert fald ikke. Jeg har været i butikken, og inden for denne butik, så ser jeg så på, hvad er det jeg søger? Men nu hvor jeg har 2 briller, jeg skal veksle imellem dagligt, så ville jeg nok have handlet anderledes. Havde jeg vidst det i dag, så havde jeg nok ikke brugt flere tusinde på at par briller, altså jeg er super glad for dem og de er rigtig fine. Jeg har det bare bedre med, at have købt de her, og så kan jeg skifte om et halvt igen. Hvor de andre, dem vil jeg nu have betalt færdig, inden jeg skifter igen.

Maria: Men i forhold til at blive påvirket af reklame, så jo det gør man da helt sikkert. Uanset hvor man kigger hen, så er der nogle nye briller, som er kommet frem. Fx med retro briller, så ved man godt lige, at dem man har måske er gået af mode.

Men synes I generelt at det er nemt at gennemskue priser og prisforskellige mellem de forskellige kæder?

Tehneyat: Man hører i ny og næ at der er udsalg. Faktisk har de næsten altid udsalg. Udsalg på så og så mange procent. Det kan være meget svært at skelne, hvor de bare har en rigtig god pris og hvor det er nedsatte varer.

Mette: Det er jo tit stel, som der er tilbud på. Og det er jo mange gange ikke det er der dyre. Det er jo glassene der koster. Så jeg vil sige, så længe det er stel, altså selvfølgelig har det påvirkning, Men de siger aldrig 50 % på glas, det ville betyde mere.

Morten: I og med, at det er noget lægefagligt indeover det. Så synes jeg ikke jeg ville have det samme forbrugsmønster med at shoppe så meget rundt. Jeg ville ikke købe et par briller et andet sted, hvor jeg ikke havde den samme fornemmelse eller troværdighed, bare fordi de var billigere. Men tilbud må jo have en virkning, for der er godt nok mange af dem.

Hvad så med udvalget i butikkerne? Er det vigtigt der er meget at vælge imellem? Fx indenfor mærker eller bare generelt bredt?

Morten: Det er sjældent jeg kigger på et bestemt mærke. For mig skal det bare være bredt udvalget, så der er noget forskelligt at prøve. For mig er det mest, om de passer til mig.

Tehneyat. For mig er det anderledes eller helt modsat. Jeg sørger på nogle bestemte mærker. Kan jeg godt lidt et par Channel briller, vil jeg gerne, de viser mig alle de briller de har inden for Channel. I alle forskellige farver, i stedet for de kun viser 2 inden for forskellige mærker.

Maria: Tror det er meget med de store kæder, så har de et rigtig bredt udvalg. De har lidt af det hele og skal ramme en rigtig bred målgruppe. Så de har lidt af alle mærker. Da jeg selv var på brille jagt, jamen jeg var i alle de butikker jeg kunne komme ind i. Der opdager man at de små butikker har lidt deres egen stil, hvor man kommer uden om alt det mainstream fra Thiele og Synoptik.

Hvad med prisniveau – skal der være et udvalg inden for forskellige prisniveauer?

Morten: Jeg tænker ikke over det – det er bare at prøve sig frem.

Mette: Jeg sidder lige og tænker over hvordan jeg gør. Jeg startede først med ét mærke og prøvede indenfor dem, og fandt så ud af at de skulle være lidt firkantet til mig, og så bevægede jeg mig rundt blandt forskellige mærker og prøvede nogle forskellige og tænkte ikke på nogle bestemte designer mærker og endte med et par Bjørn Borg, som jeg umiddelbart nok ikke havde valgt. Jeg starter med det, jeg kender og bevæger mig så lidt ud.

Morten: Er det så ikke fordi, du kender de mærker i forvejen og ved de har den rigtig stil. Hvor man med tøj, nogle gange kan købe nogle helt magen til, men vil have mærkevaren. Med briller der er det meget anderledes, jeg går mere efter brillen og så ikke mærket.

Sara: Jeg har en ide om, at mærke ikke rører mig. Jeg har det fint med kun at have givet de penge, jeg har for dem, jeg har nu. Er egentlig lidt irriteret på mig selv over, at jeg betalte så meget for dem, jeg købte sidste gang. Men jeg købte dem 100 %, fordi det var dem, det lige skulle være. Men jeg undlod direkte at prøve nogle briller fordi de havde et mærke, som ikke er mig. Jeg har aldrig købt Channel eller Gucci, og for mig skal de faktisk ikke vise mig for tydeligt, at det er nogle bestemte briller. Det er bare hvem jeg er som person, og det er jo også et statement i sig selv.

Tehneyat: Jeg vil lige sige, at de der Channel briller, ikke er sådan nogen med stort C på siden, men jeg havde bare set dem i et blad og kunne godt lidt dem og synes de var fede. De briller jeg havde før, der gik jeg bare ind og sagde, at de skulle være sådan lidt med nogle farver og på en bestemt måde. Så det er meget tilfældigt, hvad man falder over.

Mette: For mig var det heller ikke sådan, at det skulle være et mærke for alt i verden. Jeg er heller ikke til blingbling. Det skulle helst være lidt afdæmpet. Men jeg gik bare ind med en forestilling, om at jeg skulle have en mærkebrille, men da jeg så så det ikke var mig, så kiggede jeg mere rundt. Så det var ligesom min første holdning. I dag vil jeg nok gå mere efter formen på brillerne før jeg kigger på mærkerne.

Sara: Lige nu er det jo meget mere et statement at have brille end det måske nogensinde har været. Altså min søster på 16 har et par briller uden styrke. Det synes jeg jo er fantastisk morsomt. Hvorfor fanden have briller når man ikke har behov for dem.

Morten: Ja jeg kender også nogle, som bare har briller uden styrke.

Hvor meget betyder beliggenhed for jer?

Maria: Det betyder meget for mig.

Tehneyat: Tæt på hjem eller arbejdet.

Maria: Ja præcis – lige på vejen.

Sara: Det er også det gode med de store kæder. Nu bor mine forældre i Århus og når jeg er der, så kan jeg også gå ned i Århus og få hjælp. Det kan godt være jeg altid kan gå ned i butikken herhjemme, men jeg synes det er rart at vide, at jeg også kan få hjælp, når jeg ikke lige er hjemme. Det er ret lækkert.

Morten: Jeg vil lige sige, hvis jeg ikke havde følt mig tryg ved den nærmeste butik, så havde jeg gået videre. Så beliggenhed er ikke det vigtigste for mig, det var bare et tilfælde, at jeg rent faktisk følte mig tryg hos dem.

Når I så besøger en optiker, er det på vej til noget eller i hvilken forbindelse?

Rasmus: Det er i høj grad i yder punkterne på ens dag, så det er faktisk meget nærliggende, at det ligger tæt på ens hjem. Det har jeg prioriteret ret højt.

Føler I så, at I har et godt udvalg tæt på jer?

Rasmus: Synoptik osv. de er jo over det hele, de er både på Østerbro og Vesterbro. Så du har altid mange mulighed og du behøver jo ikke skifte kæde, bare fordi du flytter lidt rundt i byen. Det er jo også en fordel kan man sige.

Sara: I en radius på bare 100 meter er der 3 valgmuligheder. På Frederiksberg var det faktisk sådan, at jeg ikke en gang skylde krydse gade for at komme i Synoptik. Jeg kunne lige så godt have gået ind i en af de andre. Den lod bogstaveligt lige om hjørnet, så det blev bare den første.

Maria: Jeg fandt mine briller på en rejse, men ville så ikke købe dem der. Men jeg fandt dem så i en butik på Østerbro, hvor jeg kom i forbindelse med at få dem udleveret osv., men det er ikke der jeg kommer, når jeg skal have dem justeres osv., så går jeg ned til min lokale Thiele.

Hvad med hvordan butikken er indrettet? Har det betydning hvordan der ser ud?

Rasmus: Det har helt sikkert noget at sige med førstehåndsindtrykket. At de lige har rodet op og der ser ordentlig ud. Vi kender det jo selv, når vi har gæster, så rydder vi også lidt op. Det betyder noget for mig.

Maria: Jeg lagde faktisk mærke til, at brillerne var vendt anderledes. I min optiker havde de sat brillerne på skrå, så man bedre kunne se stellene fra siden, og det er jo også det man selv lægger mærke til og har svært ved at se. Det gav en meget god effekt og gjorde det mere indbydende at kigge rundt.

Tænker I over om nogle er mere eksklusive end andre?

Sara: Nu hvor vi bor inde i byen, så er der ikke nogen som overlever, hvis ikke det ser ordentlig ud. De skal leve op til et vist image. Jeg ville blive overrasket, hvis der ikke så ordentligt ud, det er bare noget man forventer, og jeg har faktisk heller ikke set nogen rodet butik i København eller Århus.

(Ark 1 udleveres. Prioritering af de 5 elementer – Resultat heraf diskuteres i selve opgaven)

Generel diskussion (ift. touch points)

Brillermoden, er det noget I følger med i?

Maria: Nej, nu sagde du (Tehneyat) det med at man køber briller meget sjældent.
Og når man bruger en masse penge på det, så ønsker man ikke at man skal skifte ud efter et halvt år. Selvfølgelig betyder det en del, når man vælger, men det skal gerne være et ret tidløst design, så man har det godt med dem i langt tid.

(De fleste udtrykker enighed med Maria)

Lægger I mærke til reklame for briller i tv eller på busstopskilte?

Sara: Det kommer an på, hvor man er henne. Altså i ens brilleforløb. Altså ser jeg en reklame for et par fede sko, så tænker jeg over det. Men fordi jeg ser en reklame for en brille, så ville jeg ikke reagere på det. Nu ved jeg at, jeg ikke skal købe briller det næste stykke tid, så jeg går ikke ned og købe nogle nye pga. reklamer. Det der får mig til at vælge et par nye briller, er mit syn og ikke omvendt. Det er ikke stilen, der dikterer det. Så derfor er det også vigtigt for mig, at de er ret tidløse, at det ikke er et eller andet skrigende pink.

Hvis I skulle finde en ny optiker i morgen, hvordan ville I så søge information?

Morten: Jeg ville spørge andre, som også selv bruger briller.

Mette: Man påvirkes meget af, hvad andre siger og anbefaler. Hvis nogle har haft en dårlig oplevelse, så tænker man, at så skal man i hvert fald ikke gå der hen.

Er det så alle butikkerne i kæden I tænker på eller er det den enkelte butik?

Sara: Nu nævnte jeg før, at min veninde og hendes kæreste bruger Louis Nielsen. Og jeg fandt ud af, at Louis Nielsen tager penge for deres synsprøver, og det er jo gratis i Synoptik. Jeg synes jo egentlig, at det var meget lækkert, og det var egentlig lidt dumt, for så tænkte jeg, at det var da noget billigere. Og så fik de ligesom fangede mig med en god oplevelse.

Diskussion af optiker brands:

Hvad var den seneste optiker I besøgte?

Mette: Det er Synoptik, den har jeg valgt flere gange, det er den i Frederiksberg centeret lige over for skolen.

Sara: Jeg valgte så Louis Nielsen i stedet for Synoptik, som jeg har brugt tidligere. Næste gang ville jeg vælge Louis Nielsen igen, også fordi servicen var okay udover den lave pris.

Tehneyat: Synoptik, dem er jeg vant til og uden jeg får en grund, vil jeg ikke skifte. Medmindre jeg flytter eller får arbejde i udlandet.

Maria: Nu modsiger jeg mig selv rigtig meget, for nu har jeg sagt, at beliggenhed betyder rigtig for mig, at det ligger lige på vejen. Faktisk, så der hvor jeg har fået mine briller, der var jeg rigtig tilfreds med den behandling jeg fik i butikken, og han har også haft fat i mig, om jeg ikke skal have mine linser der. Og jeg overvejer, om jeg ikke bare skal skifte til den. Den hedder Koldby Optik på Østerbro. Han har en evne til at føle sig som om, man har kendt hinanden i rigtig lang tid og det giver en meget god følelse, når man skal handle. Thiele er altså ikke mine foretrukne.

Morten: Synoptik, jeg tror efter i dag, at jeg vil tænke lidt mere over det.

Rasmus: Jeg bruger Amati Optic på Østerbro, som ligger lige ved siden af Koldby. Jeg synes, faktisk ham fra Koldby var lidt for ihærdig, mens jeg fik bedre betjening og synes der var et bedre udvalg hos Amati Optic, og der vil jeg helt sikkert også starte næste gang, men jeg er ikke nødvendigvis loyal, hvis jeg finder de rigtige briller et andet sted næste gange. Men jeg føler jeg fik en god behandling og fandt både briller og solbriller der.

Nu får I lige et helt blankt papir, og så vil vi bede jer skrive et par ord til hver kæde, som jeg nævner om lidt.

(Ark 2 udleveres og Louis Nielsen, Nyt Syn, Profil Optik, Synoptik og Thiele nævnes på skift)

Hvad har I skrevet til de forskellige?

Louis Nielsen:

Rasmus: Discount og dårlig reklame

Morten: Billigt. 2 briller for én pris.

Maria: Ny kæde i forhold til de andre.

Tehneyat: Grøn, og Spejl. Sådan noget man kan se sig selv med brillerne.

Sara: Billigt, fint udvalg og også god service. Min mor mente, det var noget billigt skrammel.

Mette: Billig, Netto-agtig og ikke kompetente.

Morten: Det er dem med kopimaskinen i brillerne.

Tehneyat: Dem i radioen er simpelthen de værste.

Nyt Syn:

Morten: Aldrig hørt om dem.

Mette: Kan se logoet for mig, men kender dem slet ikke.

(De andre deltagere kender heller ikke kæden)

Profil Optik:

Rasmus: Jeg har skrevet kvalitet, men er lidt i tvivl.

Tehneyat: Jeg har skrevet blå facade. Tænker på dem som gammeldags.
Alt det blå virker bare sådan lidt… Altså det grønne hos Synoptik og Louis Nielsen virker mere friskt og imødekommende. Men det blå er ikke sådan åbent og positivt for mig.

Sara: Hvis ikke det var Synoptik, så var jeg nok endt hos Profil Optik.
Jeg kan huske en reklame med solbriller oveni prisen og der var brillerne ret fede. Så dem kunne jeg godt finde på at besøge

Synoptik:

Tehneyat: Grøn, God service, gratis kontakt linse prøve tid. Det er vigtigt for mig, at jeg kan prøve lidt forskellige linser, og få testet hvad der passer.

Morten: Lars Hjortshøj

Rasmus: Det har jeg også skrevet, og så briller til alle, sådan er der logo vist.

Maria: Ligger alle vegne

Sara: Jeg har skrevet Stort dyr, som en negativ ting. Altså det der med at de ligesom havde fanget os alle. Men et godt udvalg, det kan man ikke tage fra dem. De er alle vegne og de har jo alt, altså lige præcis briller til alle.

Thiele:

Rasmus: Kvalitet og bredt udvalg. Altså godt sortiment

Maria: Service-minded og venlige, og igen alle vegne.

Tehneyat: Jeg har ikke skrevet noget, men de har været søde til at sætte en ny skrue i.

Sara: Jeg har skrevet ukendt. Jeg har aldrig besøgt dem.

Mette: Jeg har skrevet unge ansatte, og da jeg skulle købe solbriller stod der en ung medarbejde, som ikke rigtig kunne hjælpe med med noget. Og så har jeg også skrevet koldt og meget travle ansatte. Men det har jeg faktisk også skrevet ved Profil Optik. De er meget ens for mig, men jeg kender dem heller ikke så godt nogen af dem.

Er der nogen kæder, som I synes skiller sig ud fra mængden:

Morten: Synoptik skiller sig ud med deres reklame med Lars Hjortshøj.

Rasmus: Ej det er mere Louis Nielsen.

Maria: Ja mere Louis Nielsen

Morten: Ja det er rigtig med Louis Nielsen.

Mette: Jeg synes egentlig de alle sammen minder ret meget om hinanden. Synoptik kender jeg bare bedst. Og så har de måske lidt større butikker.

Er der nogen som er svære at adskille?

(Her er der ikke rigtig nogen kommentarer, og det er svært da ingen kender Nyt Syn, og dermed ikke ved, om de minder om nogen af de andre kæder.)

(Ark 3 med 50 beskrivende ord uddeles til alle deltagere – Resultat heraf diskuteres i selve opgaven)

Hvis Louis Nielsen var en person, hvordan ville I så beskrive denne?

Maria: En som tænker på det skal være billigt. Det er ikke billigt-dårligt, men mere bare noget godt, men billigt. Jeg har aldrig været der, men min opfattelse er, at det er en udmærket vare til prisen, og at de går efter de kunder, som måske ikke vil ofre så mange penge.

Rasmus: Klassens frække dreng, altså sådan de laver nogle helt særlige tilbud og tør være billige.

Sara: Jeg tænker sådan lidt, pædagog eller sygeplejerske. En eller anden der har et arbejde, hvor det skal virke og være der, men det skal ikke må gå i stykker eller kunne byttes ud.

Mette: Det vil jeg give dig ret i. Jeg tænker også sådan håndværker, hvor det skal kunne holde til noget eller skiftes ud. For mig er det også meget en som handler i Netto. Altså, det gør jeg også selv, men jeg ser bare hele tiden en som render rundt i Netto og det der discount. Det er smart det de laver, men får hele tiden netto-følelsen.

Hvis Nyt syn var en person, hvordan ville I så beskrive denne?

Mette: Bogholderen

Rasmus: Jeg har skrevet original.

Mette: Jeg tænker sådan negativt ift. 80'erne. Ikke følget med i udviklingen.

Tehneyat: Hvis folk ved at donere penge til Afrika, eller at man kan give sine gamle briller til dem. Så vil unge og lidt ældre som støtter NGO'er, så ville de nok vælge dem. Jeg synes, det er en fed ide og ville kigge forbi en anden gang. Folk der generelt tænker på sine omgivelse, ville nok vælge dem pga. deres initiativ.

Mette: Ja det synes jeg også, men jeg vidste bare ikke de gjorde det.

Sara: Jamen, det er meget sjovt, jeg har set den der reklame for Landsbanken og set den med hende som har opgivet alt osv., men jeg har heller ikke opdaget Nyt Syn.

Hvad så med Profil Optik, hvordan ville I så beskrive denne?

Maria: Det er den trofaste kunde, som er ældre end os, som kommer der igen og igen efter rigtig mange år.

Mette: Jeg tænker lidt Danske banke, altså sådan lidt Konservative.

Hvad så med Synoptik?

Sara: Det er den trendy og advokaten. Kan godt lide et par pæne briller og god kvalitet. Hvis jeg ikke skulle tænke på prisen, ville jeg gå derind. De har taget 50 kr. for nogle silikone dutter til mine briller, det synes jeg faktisk var lidt strengt, og så fik jeg endda at vide, at jeg skulle købe 2 par. Og nu har jeg stadig de der liggende.

Morten: Jeg tænker mere på dem som familieorienteret. Der har været børn og fest og farver, når jeg har været der. Trendy har jeg ikke tænkt.

Mette: Jeg er enig, jeg synes heller ikke de er trendy.

Rasmus: Familieorienteret har jeg også, og så også sagt succesfulde. De har formodet at skabe et image og et brand, og vi kender dem jo alle, hvilket jo må siges at være en succes.

Morten: Ja, enig.

Hvad med Thiele?

Rasmus: Den har jeg som markedslederen, noget dyre og modige og også kvalitetsbevidst. Og så synes jeg egentlig også, at deres udvalg er rimelig trendy.

(De fleste nikker)

Mette: Igen, jeg har det noget svært ved at skelne mellem Profil Optik og Thiele fra hinanden. De er lidt det samme for mig. De stikker ikke ud fra hinanden. De har ikke en position som modebevidst eller noget.

Maria: Jeg har dem lidt ungt lidt mere friskt. Altså deres målgruppe og i forhold til deres udvalg.

Sara: I mit hoved har jeg kun Synoptik og Louis Nielsen, og det er lidt modpoler for mig. Ellers kender jeg kun de andre af navn og ved bare at de er til.

(Ark 4 med bedømmelse af kæderne udleveres til alle – Resultat heraf diskuteres i selve opgaven)

Øvelse: Positioning maps

Kommentarer til Pris vs. Service.

Rasmus: Jeg har Thiele ret højt oppe.

Maria: Jeg vil have dårlig service og lav pris til Louis Nielsen.

Sara: Jeg fik et mere nært forhold til ekspedienten hos Louis Nielsen end hos Synoptik. – Jeg synes godt Louis Nielsen, skal være på den gode side ift. Service.

Maria: Profil optik er faktisk ret eksklusivt.

Morten: Men jeg kender intet hos deres Service.

Maria: Jeg synes faktisk Synoptik er lidt dyre end Thiele

(Nyt Syn placeres i midten)

Morten: Det er svært at snakke om service ift. kæder, for det er meget forskelligt fra butik til butik.

Rasmus: Er servicen ikke okay hos Louis Nielsen?

Morten, Maria og Sara: Jo

Mette: Jamen er den virkelig så god? For mig kan det bare ikke passe at de er så gode som de andre til den pris.

Maria: Det er egentlig sjovt, at Nyt Syn har ”Øje for den du er”. De kører sådan meget på følelserne.

Kommentarer til Pris vs Kvalitet.

Sara: Det er svært med kvalitet. Det er jo noget plastik og noget glas.

Sara: Jeg føler mig lidt som en forkæmper for Louis Nielsen, men jeg kan godt forstå I skubber den over mod dårlig kvalitet, det må jo være noget ringere.

Maria: Profil Optik og også Louis Nielsen vil jeg rykke længere hen mod høj kvalitet.

Morten: Jeg ved godt det er billigere, men er det dårligere kvalitet?

Rasmus: Det er jeg overbevidst om, ellers kan de simpelthen ikke gøre det til den pris.

Maria: Har de nogen mærker? Jo de har Rayban ik?

Sara: Altså, det er ikke mange, men de har nogle enkelte. Jeg har virkelig svært at sige noget om kvalitet.

Rasmus: Det er svært med kvalitet, det jo nok meget ens rundt omkring.

Mette: Rent kvalitetsmæssigt vil jeg sige, at det er det samme og de samme mærker går jo også igen.

Maria: Ja det er de samme mærker, de har de fleste steder.

(Opfattelsen af Louis Nielsen er ret ringe og discount forbindes generelt meget med lavere kvalitet)

Afholder jeres opfattelser jer fra at besøge Louis Nielsen?

Maria: Faktisk, det lyder måske lidt overfladisk, men første gang jeg kom ind i en Louis Nielsen, tænkte jeg: Hvad fanden er det for en farve de har malet med herinde og så skyndte jeg mig næsten ud igen.

Sara: Ej det er også rigtigt, der er ikke det rigtige lys og flotte gulve. Jeg tror faktisk der er gulvtæppe på.

Maria: Nej det er sådan lidt morfar-agtigt og sikkert bare lysstofrør.

Sara: Jeg lagde mærke til, at hende der ekspederede mig, havde sådan en ulden gardigan på, som bare var 7 størrelser for stor.

Mette: Når jeg virkelig skal bruge de mange penge på briller, så tror jeg også bare jeg tænker, at jeg vil have noget ordentlig og en ordentlig kvalitet. Og derfor går jeg så ikke ind i Louis Nielsen, for der tror jeg ikke, jeg får den kvalitet, som jeg søger.

Kommentarer til Pris vs Udvalg.

Tehneyat: Louis Nielsen må have et stort udvalg ik?

Sara: Jo det er stort, men ikke alt er relevant. Der meget jeg ikke ville vælge. Der er ikke meget man vil vælge imellem, men der er da mange briller på væggene. De opdeler det heller ikke i mærker, men mere efter pris.

Morten: Ja men det er også det, om det er mange forskellige stel. Men er der ikke mange at vælge imellem til en selv?

Maria: Hvad er et godt udvalg. Er der bare mange uinteressante mærker og designs, eller er det også meget som passer til en selv? Altså det har jo også noget sige, om man bare finder noget til en.

Sara: Jo det er selvfølgelig rigtigt. Hos Synoptik er det meget de samme som går igen. Men der er en brille til alle også hos Louis Nielsen.

Tehneyat: Synoptik har i hvert fald et godt udvalg.

Maria: Igen følges de andre meget ad. Men jeg ved ikke helt om Profil Optik skal lægge så billigt igen.

Kommentarer til Service vs Udvalg.

Maria: Ja hvis det er, om de er opmærksomme og på ift. at hjælpe, jamen så er det jo god service.

Mette: Det kan jo godt betale sig at de hjælper en med små services og reparationer, fordi så kommer man nok igen.

Sara: Altså, jeg synes Louis Nielsen skal længere op. De kan slet ikke overleve, hvis de ligger i det negative felt. Slet ikke når der er så mange, altså når konkurrencen er så hård.

Tehneyat: Synoptik må gerne komme højere op.

Jamen, tak for det, det var faktisk det for i dag.

Appendix 10: Transcription of Focus Group 2: 22.04.2010

Deltagere:

Tom:	53, Leder PFA Nærsynet, brugt briller siden han var 18 år
Leif:	52, Salgschef Hills, bruger primært kontaktlinser igennem 12 år men også læsebriller
Kim:	54, Told og Skat, brugt hverdagsbriller i 15 år
Michael:	54, IT specialist IBM, brugt læsebriller i 3 år
Sanne:	53, Konsulent, brugt briller siden hun var 10 og supplerer med kontaktlinser
Gitte:	54, Skat, brugt hverdagsbriller i 10 år
Lone	50, Familierådgiver, brugt hverdagsbriller siden hun var 15 år
Jette:	51, Underdirektør i Nykredit selskab, brugt hverdagsbrille siden hun var 18 år

Beslutningsproces og valgkriterier ift. butik / kæde

Sidste gang I var hos en optiker, hvorfor valgt I så denne butik?

Tom: Både min kone og jeg bruger briller, og jeg mener vi så et tilbud i en lokalavis nede fra Profil Optik i Solrød Centeret. Og så var det lang tid siden vi havde skiftet briller, det er jo ikke noget vi gør jævnligt. Så vi troede vi skulle ned og have nogle billige briller, men det gør man jo sjældent pga. så dur glassene pludselig ikke og man skal have det ene og det andet ekstra. Og pludselig koster det en bondegård, når man er færdig. Man fik 800 kr. Rabat, men når man så ligger alle deres tillæg til osv., så holder det jo ikke.

Men var det en god oplevelse der nede?

Tom: Ja ja, servicen er fin, bortset fra prisen, så synes jeg det er okay. Men jeg synes det er vildt dyrt og ofte en enorm overpris man betaler hos de rigtige optikere.

Men I fik også taget synsprøve osv?

Tom: Ja det gjorde vi, vi var hele vejen rundt.

Leif: For mit vedkommende har det været samme sted pga. Pakkeløsning med kontaktlinser. Det er døgnlinser så der kommer en pakke hver anden måned. Så er det en gang om året jeg lige skal ned og have tjekket synet og styrken, med mindre jeg synes der en noget inden. Og pga. dette serviceeftersyn en gang om året bliver det automatisk også der jeg går hen ift. læsebriller. Jeg bruger jo læsebriller og også når jeg har dage hvor jeg sidder meget ved skærmen. Selvfølgelig begynder man at kigge lidt på priserne, desværre er jeg faldet for den dyreste løsning, og jeg har da været inde på nettet og søge om man godt kan få det billigere og ja det kan man. Men hvad gør man så hvis styrken pludselig skal ændres, ift. prøveperioder osv. og det er nok der hvor convenience spiller ind og man bare tager den samme og den samme.

Kim: Den sidste jeg var nede hos, det var en nede ved Greve Strandvej fordi min kone sagde jeg skulle prøve det. Det er privat praktiserende optiker, som har ligget i et center før. Der fik jeg både briller og solbrille til en god pris. Der var et lille udvalg men en god forhandling. Men da jeg fik brillerne kunne jeg faktisk ikke se med dem, eller det kunne jeg godt, men hun sagde det var noget jeg skulle vænne mig til. Men det fungerede ikke, så jeg gik ned og fik dem faktisk byttet og fik skiftet begge glassene. Men jeg har haft tre forskellige par briller og været hos tre forskellige optikere.

Hvad er så en god oplevelse hos dem du har besøgt. Hvad er vigtigt for dig, når du kommer der ned?

Kim: Ej det var vigtigt for mig, at de det ene sted tog ansvaret for glassene var forkerte. For jeg havde købt de dyreste glas, så jeg tænkte det er flot, hvis jeg ender med et par briller jeg ikke kan bruge. Men de blev byttet uden problemer. Det betyder meget. Det betyder også meget, at når de først havde fundet min styrke, så kunne de også lave mig et par solbriller. Et par dyre stel som jeg fik til glassenes pris

Sanne: Sidst jeg fik briller valgte jeg en af de billige forretninger for første gang, en der hedder Optik huset i Roskilde og jeg må indrømme, at jeg var positivt overrasket. Servicen var god og prisen under de halve. Sidste gang jeg købte et par briller var Hos Thiele hvor jeg købte et par briller til 10.000, her fik jeg både briller og solbriller til det halve. Men er der en ting jeg savner, nu har jeg brugt briller i rigtig mange år og været hos mange forskellige optikere – her var det første gang jeg fik at vide hvilken størrelse i stellet jeg skulle kigge efter. Alle briller har et nr inde i stellet som fortæller noget ift. bredden og ens ansigt. Og jeg har aldrig oplevet andre steder i Danmark, de gør det og hvor skulle man som kunde vide det. Det er alle mærker der har det og det er standardmål, så nu ved jeg præcis hvad der passer til mit ansigt. En ting er rigtig glas noget andet er rigtigt stel.

Lone: Jeg har altid valgt optiker efter hvor jeg har forelsket mig i et stel. Når jeg har skulle købe briller har jeg altid gået i alverdens forretninger først og set hvilket stel jeg vil have og det har så været afgørende for hvilken optiker det blev. Jeg har både været i Thiele og Synoptik, senest i Synoptik fordi de havde et godt tilbud. Og fordi jeg vidste jeg skulle have dobbeltslebne kostede det en lille smule mere end jeg plejede og så gik jeg ned og kiggede og fik også en god vejledning. Men det bliver også altid dyrere end hvad man lige regner med. Specielt når man fx skal have dobbeltslebning til gengæld fik jeg så stellet på tilbud. Jeg tror, jeg gav 6.000 – 7.000 kr for glassene alene.

Tom: Det er som regel glassene som pumper prisen op. Det kan så være svært at overskue de forskellige designs der er af glas fordi der er nogle synsfelter, bredder osv. Og så sidder man der og får vejledning omkring at det vil være godt hvis man får det, men samtidig skal man også huske slebning osv. Det er jo altid svært at sige nej.

Leif: Til gengæld finder man også ud hvad glassenes kvalitet betyder. Jeg startede fx med et par billige briller, jeg skulle jo bare have noget jeg kunne se lidt bedre med, men de holdt så heller ikke så længe. Så jeg tænkte, at nu tager jeg lige skridtet videre, hvor jeg så fik et par rigtige læsebriller hos en optiker inden jeg gik over til kontaktlinser, og så blev tingene lige pludselig skarpe i kanterne, bogstaverne sorte og skarpe og ikke ulme eller noget, som man oplever ved læsebrillen til 100 kr. Det er altså ikke andet end noget plastic som lige er blevet slebet i en nogenlunde bue. Det hjælper da, men den dag hvor man får en rigtig brille så er der altså forskel.

Gitte: Altså, jeg synes de hjælper. Jeg har altid kun brugt de helt billige briller og har været ganske tilfreds. Men jo, jeg kan da godt se, hvad du mener Leif og jeg burde snart gå ud og købe en rigtig brille.

Så det er meget vejledning og kvalitet der betyder noget når I vælger butik?

Jette: Mest kvalitet vil jeg sige. Det handler jo om man har dem på hver dag. Først må de da gerne være pæne men også at man kan se ud af dem. Så det er super vigtigt at det er ordentlig kvalitet.

(Alle nikker til denne udtalelse)

Kan I så sætte nogle ord på, hvad der gør, at I vender tilbage til samme butik?

Jette: Nu er jeg jo også linsebærer og derfor skifter man jo ikke så tit pga. de her kontrol og det smitter også af på hvor jeg køber briller. Men det bygger da meget på tillid ligesom hos tandlægen og hos lægen, hvis ikke man har tillid dur det ikke. Og jeg har klart mistet tilliden til min optiker, så jeg skal ud og finde en anden. Jeg har nu fået korrigeret mine glas et andet sted fordi min optiker (Synoptik) ikke kunne finde ud af det. Da jeg kom ned og fortalte, at vi havde haft en servicevogn ude på arbejdet, hvor hun mente der var en anden løsning blev han fornærmet. Ej så tænker jeg, at det er nok ikke her jeg skal være kunde. Så det bygge meget på tillid. Jeg skal vide, de gør det ypperste for at jeg får det rigtige, men jeg tror det er svært for øjne er jo meget forskellige.

Lone: Ja og det ændrer sig jo også – et syns ændrer sig over tid og det skal der jo også tages højde for. Jeg startede med at være nærsynet, og nu er jeg langsynet. Så som sagt tingene ændrer sig. Men jeg er helt enig, tillid er det vigtigste.

Leif: Men Jette, det du siger med, at de selv er lidt fremme i skoene og søger nogle løsninger og spørger indtil og gerne vil noget, det er netop det, jeg oplever hos min optiker og nok også derfor jeg er bare blevet ved med at komme der i de her 12-14 år. Fordi når jeg kommer, og han spøger hvordan går det og ja.. jeg synes bare jeg er begyndt at have det og det problem. Jamen okay – så prøver vi nogle ting af og så får jeg et par løsninger med hjem, og ser hvordan det går. Så får jeg ti sæt med hjem. Og hvis ikke det går så kommer du bare ned igen for det kan være noget andet – altså prøver at gøre noget. Og når man gør det, så glemmer jeg faktisk det er dyrt. Fordi du har en sikkerhed for der bliver gjort noget, hvis du står i en problemstilling og der så ikke bliver gjort noget. Så den bløde vinkel med muligheder for justeringer, det er vigtigt. Så holder man bare ved.

Er det så også de samme ting, der ville gøre om I ville anbefale en optiker til andre, altså god tillid og service? Hvad skal der til for, at I siger til andre, at de skal rende ned i jeres optiker?

Jette: Det er den gode oplevelse. Det, at de gør noget for en og optimerer ens oplevelse, så vil jeg da med glæde anbefale det til andre

(Alle nikker til denne udtalelse).

Leif: Ja så der hvor det enten er en personlig anbefaling eller en butiksanbefaling. Altså for mig ville det helt klart være en personlig anbefaling, for jeg havde da været i en butik og ud fra ekspedienten, så var jeg da ikke kommet der. Så det er personligt, ligesom Jette sagde med tandlæge og læge – det er en tillidssag.

Gitte: Jeg har været inde i Synoptik i Greve Centeret og pga. af ham den ene, så tænkte jeg – her gider jeg da slet ikke komme så. Det kunne være lige meget.

"Var de ikke kompetente nok eller kemi?"

Gitte: Det var uden tvivl hans attitude og væremåde. Det var nok til jeg kun fik min synsprøve der, og så er jeg aldrig kommet igen.

Leif: Lige præcis

Attributes

Hvis vi kun lige kigger på service, hvad er så god service for jer? Kan I sætte nogle ord på?

Sanne: Det er en kombination, tror jeg. Fordi servicen kan være god nok, men hvis du står overfor en person, hvor kemien ikke er der, fokuserer du på de negative vibrationer, du har overfor personen. Kombinationen af 'tagen hånd om' og ekspertisen. Fx også der jeg sidst var i Roskilde, der vil de kun lave en garanti af brillerne hvis man også får lavet en synstest der, fordi de vil sikre sig man får det rigtige. Og det er også god service for mig. For så må man ofrer den tid det tager og få lavet et synstest men så ved man at de kan stå inde for de glas man får i. Og det synes jeg er god service, også at opleve at en lille lokal butik kan have det. (Folk nikker)

Ja, man kan være kompetent på to måder: den faglige vinkel ift. syn og glas men også stellet og form, hvad passer til ens ansigt. Er der noget I ligger mere vægt på?

Lone: Jeg synes, det var rart sidste gang, der fik jeg 3-4 par med hjem, som jeg så kunne gå med et par dage og så gik jeg retur og sagde det skal være det stel. Jeg vidste ikke rigtig, og så var det fedt man kunne tage dem med hjem, så familien og kollegaer kunne vejlede lidt. Det synes jeg også er god service.

Gitte: Men jeg synes også det ville være god service, hvis man stod med et par briller som slet ikke klædte en. Det synes jeg, da ville være rart.

(Der bliver nikket af flertallet)

Tom: Jeg synes primært, at det er den faglige kompetence, at man får den rigtige vejledning, så man kan se ordentlig. Selvfølgelig er det også vigtigt med stellet, men glassene helt klart mest. Det andet er mere individuelt og hvad ens familie og venner synes.

Hvad med servicepolitik, er det noget I tænker over ift. synstjek, garantier osv.?

Tom: Altså i Profil Optik hvor vi var sidst, der havde de en garanti som man ikke betalte for. Eller ja, det gør man jo i princippet, når brillen kostede 10.000, men hvis ikke du kan bruge glasset, når de kommer hjem og får dem monteret, så har man ret til et par nye, hvis ikke de fungerer. Det synes jeg var meget rart.

Kim: Altså jeg vil sige, at det ikke er noget jeg har spekuleret på, men det er også noget man i dag forventer

(Alle nikker til denne udtalelse)

Kim: Jeg ville blive meget skuffet hvis ikke jeg kunne få gjort noget efter man har betalt så mange penge for et par briller. Og selvfølgelig ja, køber man et par briller til 299 så er der ikke noget at gøre ved det. Men er man på den forkerte side af 5000, så forventer man det også.

Lone: Altså når de er særligt indrettet til ens øjne og man har fået synstest, de har målt og gjort ved og hvis de så ikke passer. Så har jeg også en forventning om, at jeg efter en måned kan gå ned med dem og få dem lavet om, uden det kommer til at koste mig noget.

Tom: Ja, men de er også frække, Hvis der går lidt længere tid, så får man bare at vide at det er dit syn som har ændret sig!

(Folk nikker og smiler)

Okay, hvad med ift. online service, er det noget I benytter jer af? Fx. tidsbestilling, udvalg osv.?

Jette: Jeg bestiller tid online på nettet, det fungerer fint.

Lone: Min datter på 18 er lige begyndt at bruge briller efter mange år med kontaktlinser. Og det skulle jo selvfølgelig være en mærke brille, mindre kunne ikke gøre det. Så der gik vi ind på nettet, hos Synoptik, hvor hun faktisk havde fundet de briller, hun ville have. Og der kunne man gå ind og sætte hendes billede ind i en ramme og så kunne man prøve de forskellige briller. Og så kunne vi sidde derhjemme og se hvordan det så ud, når de var runde eller firkantet, grønne eller blå.

Og det fungerede godt?

Lone: Ja, det gjorde det, det var meget sjovt på forhånd at gøre sig nogle overvejelser. Det var en god tjeneste synes jeg.

(Flere nikker og tilføjer at det har de aldrig hørt om, men det er da smart)

Er der andre som har benyttet jer af det eller lign. Services eller bare været inde og kigge?

(De fleste ryster på hovedet)

Tom: Altså vi gør det på vejen, når vi alligevel har handlet. Så går man forbi og tænker nå ja, vi skal for resten lige have bestil tid, eller hvad det nu kan være.

Så har vi snakket en smule om pris, hvor meget betyder den for jer?

Jette: Jeg må indrømme, jeg ikke tænker så meget over pris. Men nu synes jeg også det er billigt. Jeg vil gerne betale for at se ordentligt.

Tom: Altså jeg synes nogen ift. briller, at de har et forklaringsproblem, altså dels så er der de billige butikker og kæder som Louis Nielsen som sælger dem til ¼ del ift. hvor meget de koster andre steder. Sverige har man også hørt om, der kan man også købe det til halv pris. Jeg synes, de har et forklaringsproblem, hvorfor det skal koste så meget mere. Det kan jeg ikke gennemskue, hvorfor glassene er så meget dyrere der. Stellet er jo nogenlunde det samme, især hvis det er mærkestel.

Leif: Ja, hvad er det lige man får ekstra for pengene. Og det er jo sjovt for med kontaktlinser, er det nogenlunde samme priser.

Kim: Jeg har så også oplevet, at der er forskel på Louis Nielsen og de andre, for min svigermor har fået nogle forkerte briller hos Louis Nielsen, og da hun kom ind var det hendes problem og ikke deres.

Sanne: Der tror jeg så igen, der er forskel på hvilken forretning man kommer i.

Kim: Helt sikkert, men nu har vi brugt flere måneder på at overbevise dem om, at fejlen er deres, men der er intet at gøre.

Michael: Altså nu er jeg jo ikke en rutineret brillebruger endnu, men jeg kommer faktisk hos Louis Nielsen, fordi priserne er gode. Nu arbejder min søster så også i den i Ringsted, så der kommer jeg oftest, og jeg ved, at de har mange faste kunder, som de også får utrolig meget positiv tilbagemelding fra, pga. de har fået en god service og en god behandling.

Lone: Men det er jo ligesom med Louis Nielsen som med Synoptik, at man kan være rigtig uheldig med en enkelt butik. Der er jo forskel fra forretning til forretning.

Men vil I så gerne betale lidt ekstra for god service?

Tom: I rimelig omfang ja

(flertallet nikker)

Leif: Og ja, det er jo nok også som jeg sagde tidligere, at jeg tænker ikke så meget på den pris. Det er stadig mange penge jo, men jeg føler stadig jeg har en vis fleksibilitet og jeg er tryg ved min optiker. Jeg kan få afprøvet forskellige løsningen uden det koster mig en krone. Den gode service sætter jeg over den prisfokus der ofte kan være. Dvs. selvom jeg ved der bliver kørt tilbud andre steder, så bliver jeg ikke fristet.

Lone: Man kan jo også lease briller, hvor man betaler et månedligt gebyr, og har dem fx i et år og så kan du gå hen og sige, nu vil jeg gerne have et nyt stel. Men så omvendt så er man pludselig bundet til en forretning og har en aftale med dem, der måske er svær at komme ud af.

Jette: Ja, det virker ligesom at have et linseabonnement. Og jeg har faktisk læst at andre optikere også kører med de tilbud.

(flere tilføjer, at det har de aldrig hørt om, men det er da egentlig smart)

Ja, er der nogen af jer andre som kunne lade sig lokke af gode tilbud?" Der var en som tidligere nævnte noget om en solbrille, var det et tilbud?

Kim: Det var mig, men det kom faktisk undervejs. Hun sagde, at man jo også kunne få styrke i sine solbriller og meget bedre end klapper man tager ned, og så kunne jeg godt høre kasseapparatet ringe, men det fandt vi en fornuftig pris på og pludselig kunne jeg godt se. at det var en bedre løsning.

Sanne: Eller jo generelt synes jeg da godt man kan, men det er svært at sammenligne priser på linser og briller. Linser er stadig et relativt minimalt beløb, man betaler hver måned og det har ikke betydning for dit udseende. Hvor med briller er det anderledes, især hvis man går med dem hvert dag og gerne vil se godt ud. Så skal de altså ikke koste mere end man godt kan skifte dem ud hvert år.

Leif: Og ja, det er så her man begynder at samle ind af priser.

Sanne: Præcis, og så gør det da ikke ligeså ondt hvis du kun har givet et par tusinde eller tre for nogle briller frem for hvis du har givet små 10.000. Så gør det altså ondt.

Men på briller, synes I så generelt at det er nemt at gennemskue priserne?

(Alle siger nej eller ryster på hovedet)

Kim: Som andre sagde tidligere, man kan måske følge med på stellet, men når glas kommer oveni, så går det galt og man skal hjem og tale med Kredit Foreningen. Og det er samtidig svært at sige stop, når man først er i gang.

Leif: Der var på et tidspunkt, hvor jeg kom til at tænke lidt på, at brillebranchen var begyndt at tage ved lære af mobil branchen. Og der var ekstremt meget med, at du kunne komme ned og et brillestel for 1 kr. og så kom dine glas, og så begyndte det at blive ugennemsigtigt. Ligeså vel som du kan købe en mobil tlf.

til 1 kr. Og så koster abonnementet bagefter. Og pludselig er det bare blevet langt dyrere. Og det må være det der gør det ugennemsigtigt. Nu har jeg ikke skulle skifte briller så mange gange, men det tænkte jeg over – hold op det er ligesom mobilbranchen det her.

Kim: Jeg er helt enig

(og flere nikker også)

Tom: Ja og igen tilbage til lægen, du tager jo heller ikke stilling til, om du vil helbredes helt eller halvt.

Gitte: Og ja tilliden igen og der ikke kun er fokus på den avance de tjener når de fremhæver det ene produkt frem for det andet.

Lone: Og desto mere afhængig man er af briller, jo mere betyder det også, at kvaliteten er i orden og tingene fungere. Og det så evt. koster det ekstra.

Okay, hvad så med ift. udvalg, er det vigtigt for jer med et bredt udvalg?

Tom: Ja det synes jeg, der skal da være lidt at vælge imellem.

Kim: Ja det kan man sige, men det vigtigste er jo bare der er det man gerne vil have. Den sidste jeg var hos havde faktisk et lille udvalg, og der lykkedes det var alligevel at finde et par, da der var de rigtige briller. Jeg tror også man kan blive forvirret over hvis der er for mange briller på alle væggene. Hvor skal man starte og hvor skal man slutte. Så et kæmpe u dvalg har jeg ikke brug for.

Sanne: Det vil jeg ikke give dig ret i. Jeg synes, der skal være et bredt udvalg indenfor både faconer og farver.

Lone: Jeg vil da sige, at selvom jeg nu har haft de her briller i små to år og de skal ikke skiftes lige med det samme. Men når jeg er ude at shoppe, kan jeg da sagtens finde på at gå ind til en optiker, og se hvad de har af udvalg og stel. Bare for at holde mig opdateret og næste gang jeg så skal have briller, så kan jeg huske hvor de havde et godt udvalg. Men jeg har da også tænkt på, at man nogen gange burde købe stel i udlandet hvis man falder over noget og bare gå ned til sin optiker og få sat glas i. Jeg har aldrig praktiseret det, men kunne godt finde på det.

Men hvad så ift. udvalg, er det på priser eller også forskellige mærker?

Lone: Jeg tror, mest det er modellerne, ligesom når man går ind i en tøjforretning. Og så skæver det selvfølgelig også til prisen. Hvad er moderne, hvilke stilarter er der, hvilke farver osv.

Michael: Jeg tror, også det kommer an på hvordan man bruger briller, jeg bruger dem ikke så meget. Og derfor går jeg nok ikke ligeså højt op i hvordan de ser ud. Og vil nok heller ikke betale så meget for dem, når jeg primært bruger dem på job foran skærmen eller der hjemme ved fjernsynet. Det kan godt vær,e at hvis jeg gik noget mere med dem til hverdag at jeg så ville tænke noget mere over det.

Kim: Og ja, så kan det også være at der generelt bare er forskel på mænd og kvinder.

Lone: Ja, da jeg var yngre, så havde jeg tre stel der passede til de samme glas. Så klikkede man bare glassene ud og skiftede mellem de forskellige farvede stel.

Hvad med beliggenhed, har det betydning for valg af butik eller kæde?

Tom: Vi tager den tæt på, den der ligger nede i Solrød centeret, hvor der også ligger tre. Og jeg undrer mig over de alle tre kan køre i sådan et lille center. Men det betyder jo bare, at der er en fed avance i den branche.

Jette: Det er i hvert fald vigtigt for mig, især hvis der skulle opstå nogle ting, at man hurtigt kan komme dertil.

Gitte: Ja det synes jeg også, man ved aldrig om de pludselig skal rettes til eller noget.

Kim: Ja men omvendt, når man ikke køber briller så tit, så gør det jo ikke noget man kører lidt længere. Jeg overvejer faktisk også næste gang at gå til øjenlæge inden optikeren og høre hvad de siger til mig syn og så have frit valg mellem optikere bagefter.

Lone: Det har jeg faktisk prøvet, og jeg fik at vide at selve styrken måtte jeg gå til en optiker og få bedømt.

Men i hvilken sammenhæng besøger I en optiker?

Kim: Først når jeg trænger til en ny brille. Men det ikke noget jeg gør lige pludseligt, så planlægger jeg det, og besøger dem en aften eller en lørdag. Så man har god tid til det hele. Og finde det rigtige.

Tom: Ja, eller når man synes brillen skal strammes op eller justeres. Men det har aldrig været kritisk om det lige bliver den ene eller den anden dag. Men det er helt klart mest behov styret, at man mærker man måske ser anderledes.

Leif: Ja er det noget man planlægger ikke impuls. Det er en prioriteret opgave. Ja jeg ved heller ikke om man bare kan dumpe ind fra gaden, og sige jeg vil have en synsprøve, kan man det? Koster det ikke noget? (nogle svarer ja og andre nej) Du betaler for det men hvis du køber noget så får du det refunderet.

Sanne: Det koster som regel ca. 100 kr.

Gitte: Og ja nogen gange har de så tilbud om at det er gratis for at lokke folk til.

Lone: Jeg lader op til det. Og så går jeg og bliver lidt mere opmærksom på udvalget og når jeg pludselig synes, at nu er brillen der eller der er et godt tilbud, så slår jeg til.

Hvad med indretningen i butikken, er det noget I lægger mærke til?

Sanne: Ja det synes jeg, netop også så man hurtigt kan danne sig et overblik og man ikke bliver forvirret, og der ikke er for mange stel osv. Også om butikken er lys og venlig og om vinduerne er indbydende. Især lyset er vigtigt, når man prøver briller, det spiller helt klart ind.

Jette: Ja det betyder noget, om der er pænt og rent og ordentligt.

Lone: Og om man føler sig tilpas, når man træder ind i butikken.

Tænker I så over, om det er eksklusivt eller billigt indrettet?

Kim: Jeg synes, de ligner hinanden meget

(Generel enighed i gruppen)

Leif: Hvis jeg skulle ud og have briller, så ville jeg nok hænge mig meget i stilen af butikken. Om jeg kunne identificere mig selv med den eller om den så lidt kedelig ud. Det samme når jeg går ind i en tøjbutik, jeg går heller ikke ind i en kedelig tøjforretning. Jeg kan godt lide, når der er noget som tricker mig, jeg kan godt føle at her kunne jeg godt få noget, som jeg vil profilerer mig med. Altså for mig, så er briller et ekstremt signalværdi man sender med hvilke briller man går med. Der er jo nogen som bruger sine briller til at sende en helt bestemt stil. Hvorfor er der stadig nogen som går med nogle store runde med brun kant? Det er da en helt bestemt stil de gerne vil signalerer (alle nikker). Så på den måde hvis jeg skulle ind og havde briller er det godt nok noget med hvordan butikken ser ud. Hvis ikke den stil de signalerer ikke er mig, så ville jeg ikke gå derind. Selvom de måske havde verdens fedeste briller, det finder jeg jo ikke ud af.

Jette: Det er en del af din påklædning. Og man kan også huske folk bagefter hvor briller udgør stilen.

Lone: Der er jo også mange i dag, især unge mennesker som har vinduesglas i, det er jo bare en del af deres påklædning. Det er for at være smart.

(Ark 1 udleveres. Prioritering af de 5 elementer – Resultat heraf diskuteres i selve opgaven)

Generel diskussion (ift. touch points)

Vi var kort inde på det før, men interesserer I jer for brillemoden?

Gitte: Jeg synes, der er utrolig mange flotte briller. Mange af mine kollegaer har briller og det er da helt klart noget man ligger mærke til. Hvor der er mange jeg synes er smarte. Så selvom jeg kun køber billige 100 kr. briller i Bilka, så interesserer jeg mig stadig for det og ser hvad andre går med.

Lone: Jeg følger da også lidt med, eller jeg prøver da. Ser hvad der er.

Tom: Det er jo sjovt at se hvordan tingene udvikler sig, når man ser nogle billeder for 20 år siden og børnene ser det, så siger de, hvor ser du sjov ud. Hvad er det for nogle briller, de er jo kæmpe store. Så man vender sig generelt til en vis stil eller mode.

Jette: Ja sådan er det jo også med tøj.

Ligger I mærke til fx reklamerne indenfor branchen? TV, busstoppesteder, blade?

Lone: Altså, hvis vi får reklamer ind ad døren, så vil det være noget af det jeg lige kigger på, som fx tilbudsavis.

Kim: Det ville jeg kun gøre, hvis jeg skulle have briller. Perioden imellem ville jeg aldrig kigge på noget.

Michael: Jeg ville gøre det samme, bare smide det ud.

Sanne: Nej man ligger ikke mærke til det før det er aktuelt.

Leif: Men det er så her det kunne være interessant, at se hvordan ville du reagere hvis prisniveauet nu ikke var som det er så mange steder. Kunne det så gå hen og blive en vare du ville have fem forskellige par af. For så kunne du lige pludselig have råd til det. Det er jo nok prisen der gør, man kun har det ene par.

Gitte: Ja man burde rejse til Kina eller Thailand og komme hjem med to par briller. Det er meget billigere og har hørt fra nogle venner, at kvaliteten er god.

Sanne: Det er faktisk det, jeg har gjort og fundet ud af det er godt, og grunden til jeg også nu har handlet i Roskilde. For prisen er nemlig også vigtig og med til at man fx kan handle de fem par man vil.

Michael: Men nu er det også afhængig af glas og stil for prisforskellen bliver jo markant afhængig hvad der skal til.

Sanne: Og det er jo netop derfor Thailand kan gøre sig gældende. Jeg har aldrig fået så tynde glas som derude, og det kan man simpelthen ikke få herhjemme til den pris.

Hvis I skulle vælge en ny butik i morgen, hvordan eller hvor ville I så søge information?

Jette: Jeg ville helt klart spørge. Jeg vil fx gerne ud og finde en ny optiker, og håber da faktisk at I i aften kan give mig ny inspiration eller et par anbefalinger. Det ville jeg helt klart, igen tillid til venner og familie og den tillid de har til optikeren. For den kan nemlig være svær at læse sig til. (Lone, Sanne og Leif nikker)

Gitte: Jeg tror, jeg ville prøve de brilleforretninger som ligger oppe i centeret. Sådan lige i nærområdet og se hvad der var i de forskellige butikker. Og hvis kemien så er der er det super, hvis ikke ville jeg nok spørge rundt bagefter.

(Kim og Tom nikker)

Leif: Og ja på den her måde hvor man snuser rundt, vil man jo selv kunne få fornemmelsen af, at her er jeg tryg. Her er tillid, det er en kompetent person, kommer med nogle gode input og hvad jeg skal være opmærksom på. Og det finder man jo kun ud af ved at tøffe lidt rundt.

Sanne: Men jeg tror også der er forskel på, at nu sidder vi her som garvede brugere, og med hvad jeg ved i dag, ville jeg aldrig gå et sted hen, jeg ikke havde fået anbefalet. For jeg ved selv hvilke forventninger jeg har til den person, som står der, hvilken service jeg vil have. I dag har vi nogle forventninger og krav som vi forventer skal blive opfyldt. Det er måske sværere at gennemskue som ung. Men det er jo også stor forskel på om det er briller eller linser. Jeg synes der skal meget mere tillid til, når det drejer sig om linser. Det har jeg hos Thiele og kunne aldrig drømme om at skifte.

Diskussion af optiker brands

Hvilken optiker kæde eller butik har I senest besøgt?

Jette: Jeg kommer nede hos Synoptik i Greve Centeret, men vil som sagt gerne prøve noget andet.

Lone: Synoptik

Gitte: Synoptik

Sanne: Thiele med mine linser, som er min faste foretrukne, ellers briller i Roskilde.

Michael: Louis Nielsen i Ringsted, hvor min søster jo arbejder.

Kim: Lokal uafhængig optiker i Greve, som jeg ikke kan huske, hvad hedder. Men der vil jeg ikke komme igen, tror jeg. Vil nok tage mig en runde og kigge lidt omkring.

Leif: Synoptik, og grunden til det startede der skyldes en anbefaling, og hvor kemien heldigvis var der og det stadig.

Tom: Vi skiftede til Profil Optik i forbindelse med noget åbningstilbud for 4-5 år siden, og det er jo lidt ligesom med banken, nu bliver man så længe, det fungerer. Før brugte vi Thiele, hvor vi også havde noget rabatordning.

Nu får I lige et helt blankt papir, og så vil vi bede jer skrive et par ord til hver kæde, som jeg nævner om lidt.

(Ark 2 udleveres og Louis Nielsen, Nyt Syn, Profil Optik, Synoptik og Thiele nævnes på skift)

Hvad har I skrevet til de forskellige?
Louis Nielsen:

Tom: Billig, mindre service

Jette: Mange reklamer (Gitte enig)

Leif: Discount, ny, lille

Kim: Billig, ikke god service, ville jeg ikke bruge

Lone: Billig

Gitte: Forveksler den med Synoptik, den grønne farve

Nyt Syn:

Ingen kender Nyt Syn.

Leif: Jeg skrev ?, har aldrig hørt om den. Det første der så faldt mig ind var øjenlæge.

Lone: Jeg kender logoet, men det siger mig ikke noget.

Tom: Altså, noget siger mig, at jeg har set en reklame i TV

Sanne: Navnet siger mig måske noget, men hvor ligger der butikker?

Profil Optik:

Tom: Kvalitet, højere priser, faglig kompetent, uddannet personale

Kim: Kender navnet men ikke som kunde, vil nok kigge forbi næste gang

Lone: Stort udvalg, som regel pæne forretninger, lidt dyrere, god service

Jette: Stærk branding

Leif: Jeg oplever den lidt niche-agtig, som om de har fundet et sted at parkere sig og adskille sig lidt inde for dette univers (flere nikker). Måske lidt privat label agtigt, det er det billede, jeg får, men jeg har jo ikke været der. Så det er kun ved at se deres facader og det signal de sender.

Gitte: Jeg blander dem egentlig sammen med de andre, og ved ikke hvordan de skiller sig ud. Jeg kan ikke sætte noget bestemt på dem.

Synoptik:

Jette: Været mange år i branchen, i min opfattelse er den lidt gammel. Dem, der havde noget tilbud med at pris og alder hang sammen.

Leif: Jeg har skrevet den gamle kending, lidt støvet, den traditionelle

Kim: Første jeg brugte, god service, ikke til at snakke priser med

Lone: Rimelige priser, mange tilbud

Gitte: Tit tilbud, aldersrabat, den grønne farve

Michael: Kan ikke forskellen på de tre sidste, fuldstændig ens i mine øjne.

Thiele:

Lone: Næsten det samme som Synoptik, men ikke ligeså traditionelle

Jette: Været med i mange år.

Leif: Den nye kendte, den kendte fordi de har været med i mange år, men alligevel har de formået at adskille sig lidt. Vil gerne være moderne, men det tror jeg har været i kraft at deres reklamer og nogle ad de folk de har brugt (flere nikker) Det har måske smittet af. Selvom de har været med i mange år, så er det ikke den gamle kending.

Tom: Bredt sortiment, store valgmuligheder, kompetent personale, måske lidt høj pris generelt, i den dyre ende.

Gitte: Minder om Synoptik, ikke så meget fremme med tilbud og reklamer.

(Ark 3 med 50 beskrivende ord udleveres til alle – Resultat heraf diskuteres i selve opgaven)

Er der nogen kæde, som skiller sig ud fra de andre?

Tom: Louis Nielsen på pris

Leif: Ja det har de, må man sige

(Alle nikker)

Er der nogen som er svære at adskille?

Kim: Thiele og Synoptik minder om hinanden. Det er de små marginaler

Leif: Ja både på udvalg, service og pris.

Sanne: Og antal af butikker måske også. De ligger meget ved siden af hinanden.

(Flertallet nikker)

Leif: Hvem er ældst på markedet?

Kim: Det må være Synoptik, det forklarer de med deres reklamer.

Hvis Louis Nielsen var en person, hvordan ville I så beskrive den?

Leif: De frække drenge i klassen

Kim: Der ville jeg sige det modsatte, en meget gammel mand. Navnet Louis Nielsen signalerer noget gammelt gammelt noget. Og sådan har jeg det også med varerne, gammeldags.

Jette: Jeg synes, de er lidt frække i deres branding, det får mig til at tænke lidt ung og lidt fræk. Lidt innovativ måske

Leif: Det er også det jeg mener med, de har skilt sig lidt ud fra de andre.

Tom: Ja meget, man kan næsten sige de går den modsatte vej. Det er nok en person, som er lidt uden for fællesskabet.

Kim: Jamen det var vel sådan når de startede som Leif siger, de frække drenge i klassen og kunne sælge et produkt til helt andre priser. Men selve signalet om navnet Louis Nielsen, så forestiller jeg mig bare en meget gammel rynket mand med langt skæg og gamle briller. Og jeg synes også at det det er billigt, betyder også det er billigt

(Leif og Tom nikker).

Kim: På tysk taler man om preizbilligt, det er ikke bare billigt – det er virkelig billigt og en dårlig service. Det hænger jo også sammen. Men jeg er da heller ikke sikkert på at selvom prisen er 3-4 gange så dyr de andre steder, at man så får 3-4 gange mere kvalitet.

Jette: Man får jo hvad man betaler for.

Lone: Altså jeg synes helt klart man får en bedre vare og kvalitet når man betaler ekstra. Men som vi også har talt om før med priserne, hvorfor er det de skal være så høje, når man nu kan få det billigere i fx Sverige. Jeg tror da ikke svenskerne ikke kan se noget.

Leif: Ja men de prisforskelle imellem lande finder du jo inden for alle varer. Den vil være der.

Michael: Et eller andet sted kan man jo så sige, at det vel heller ikke være så dårligt alligevel. Louis Nielsen kan jo ikke åbne så mange butikker, som de gør, hvis ikke der et eller andet i det som de gør rigtigt. Og jeg tror bare ikke det kan holde, hvis ikke der er en nogenlunde service, så kan de ikke holde på kunder og så rygtes det hurtigt.

(Flertallet giver Michael ret)

Kim: Ja der da helt sikkert et marked for det.

Leif: Helt klart. Men det du siger der, det er jo noget med hvor mange positive oplevelser der skal til for at opveje en negativ. Den er jo klassisk inden for alle brancher. Du Kim, har haft en dårlig oplevelse så der kommer du ikke igen. Jette, du har haft en dårlig oplevelse med Synoptik, så nu skal du ud og finde en ny optiker. Så det er noget med at har man en dårlig oplevelse, så er den bare stemplet.

Tom: Altså, jeg har det sådan med Louis, at den her kartel dannelsen som Synoptik, Thiele og Profil Optik har, der er Louis ikke med som en del af det kartel, hvor der ligesom er lagt et bestemt prisniveau og servicepolitik osv. De andre kæder opretholder et kunstigt højt pris niveau.

Lone: Selvfølgelig er der kunder til Louis Nielsen. Mange kunder går jo i retningen af discount varer. Vi hører jo også om alt det her pumpede kød, vi kan jo ikke få det fjernet fra kølediskene, fordi der er jo masser af mennesker, som køber det selvom man godt ved det er pumpet. Med det er nogle billig løsninger.

Jette: Jo men det er også det, når vi sidder her, nogle veletablerede 50+, der er jo masser af unge mennesker, som ikke har råd til dyre briller på 10.000 kr.

Hvad så hvis vi prøver med Profil Optik, hvordan ville I så beskrive den?

Tom: Jamen de er jo også med i det slæng, som jeg lige talte om. Det er de dyreste. Og så tænker jeg uafhængighed, lidt mere fri i den enkelte forretning uden og have noget at have det i. I synoptik har de ligesom en fælles forretningsgang, en politik – det har de sgu nok også i Profil men jeg oplever det ikke sådan. De er mere tilpasset hver butik. Lidt mere kundeorienteret.

Leif: Ja lidt niche synes jeg. De har fundet deres egen lille kasse.

Lone: Bedre kvalitet, lidt mere styret af det overordnet

Sanne: Ingenting, jeg kender dem ikke.

Hvad så med Synoptik, der var en af jer som nævnte grøn?

Gitte: For mig er det den her grønne butik, som er med til at skille dem fra de andre.

Kim: Ift. Profil Optik, så tror jeg den her er meget kædet ift. pris som gælder fra Hjørring til Greve inddelt i pris, klasser og bestemte muligheder. Og det er det! Og går man ind i en anden Synoptik er det fuldstændig det samme. Meget ensrettet.

(Flertallet er enig)

Er det så godt eller skidt?

Kim Nej mit indtryk er det generelt er gode varer de har og en god service, så det er et godt koncept de har, men der er ikke meget fleksibilitet i det.

Leif: Ja lidt firkantet

(Et par stykker nikker)

Lone: Til gengæld bliver det så lidt mere gennemskueligt.

Er der andre ting ved Synoptik, er de unge eller gamle?

(Alle svarer, at de er gamle)

Kim: Altså kæden er gammel

Men synes I også konceptet er det?

Jette: Jeg synes, det er meget klassisk

(Flertallet er enige)

Leif: Ja det behøves jo ikke være negativt, når man siger gammel, men den er klassisk og traditionel. De har ikke ligefrem været dem som har fornyet sig allermest

(flere er enige)

Så prøver vi lige med Thiele til sidst?

Kim: Altså jeg tror de er meget à la det samme som Profil Optik. Jeg har et indtryk af at de her Thiele butikker bestemmer mere selv, har en større handlefrihed og tilpasning. Lidt en anden type kæde.

Vi kan prøve igen, ung eller gammel?

Leif: Voksen

Tom: Middelaldrende

Lone: Lidt yngre, men stadigvæk veletableret

(flere siger ja)

Jeg synes, der var nogen som sagde støvet tidligere?

Leif: Nej det var ovre til Synoptik (flere er enige). Thiele der sagde jeg, vil gerne være mere moderne, altså det er som om de har gået i børnehave og i skole, vokset op sammen med Synoptik, og Synoptik er fortsat med, hvis det var en dame, at gå i den plisserede nederdel, hvor Thiele har prøvet at hoppe en lille smule ud. Men jeg vil stadig sige at der ikke er stor forskel på dem, men Thiele prøver at være lidt mere unge.

(Flertallet nikker)

Kim: Ved ikke med Thiele, men ved Synoptik er det jo Lars Hjortshøj som fører sig frem på skærmen, og det koster dem formentlig rigtig mange penge, men jeg synes slet ikke han passer til Synoptik. Jeg synes, det er to forskellige signaler, som ikke matcher deres image.

Lone: Og ja Synoptik er jo lige den, vi har sagt er gammel, og så står der sådan en ung komiker, så det har du sådan set ret i. Lidt signalforvirring.

I kan ikke rigtig huske nogle reklamer fra Thiele?

Lone: Nej, det er primært igennem reklamer i brevsprækken, men ellers ikke. Men nu kommer jeg jo hos Synoptik, så der får jeg løbende breve med tilbud osv.

Nu fik jeg slet ikke spurgt ift. breve, vil I egentlig gerne have og modtage tilbud på den måde eller skal det indholde det visuelle aspekt med modeller og designs?

Jette: Det er ikke lang tid siden at Synoptik sendte ud, at nu kunne linsebærer få et par gratis briller og jeg tænkte bare, ja ja det er da godt med dem. Og så skal der glas i bagefter som så pludselig koster – det var sådan, jeg tænkte.

Leif: Nej nej, du får et par briller, det er selvfølgelig bare inden for en bestemt prisklasse. Jeg var der nede, og jeg var da godt klar over det ikke var alle modeller. Men det synes jeg var fedt, og fik et par okay briller.

Jette: Ja men det var bare, hvad jeg tænkte ift. styrke osv.

(Ark 4 med bedømmelse af kæderne udleveres til alle – Resultat heraf diskuteres i selve opgaven)

Øvelse: Positioning maps

(Der tages ikke højde for Nyt Syn, da ingen kender kæden)

Kommentarer til Pris vs. Service

Leif: Louis Nielsen er lav pris, men vi er vel ikke helt ude i, at de ikke har nogen service?

(Alle svarer nej)

Tom: Ja de leverer jo trods alt nogle briller – noget må de jo gøre rigtigt, som vi snakkede om før, så noget service må der trods alt være.

Jette: Og ja der kommer hele tiden nye butikker.

Tom: Men det kan jo godt virke negativt, nogen synes jo det er godt med lav pris.

Leif: Ja men det tager vi jo ikke stilling til, vi er bare enige om, at prisen er lav ikke?

(Alle svarer ja)

Leif: Profil? Prisen er højere ikke

(Folk svarer jo)

Tom: Og servicen er også god, vi kommer der jo – den er overmiddel vil jeg helt klart sige. Vi har været tilfredse.

Sanne: Men ja overmiddel ift. hvad? For er det overfor kunderne vil Louis Nielsen helt klart også ligge bedre, der er sikkert mange kunder, som er tilfredse.

Jette: Ja men det her er jo, hvad vi tror og har en forestilling omkring.

Kim: Jeg opfatter Thiele billigere end Synoptik

Lone: Jeg vil faktisk sige, de var dyrere.

(flertallet er enige)

Jette: Men Synoptik har jo tit tilbud

Leif: Ja derfor sender de vel et signal om, at de vil være med på vognen, om at hoppe med på vognen om tilbud.

Leif: Men servicen er vel generelt meget ens – det er de marginale forskelle

(flere siger ja)

Tom: Men på prisen skiller de sig meget ud. Og nu kan vi jo se kartellet.

(alle er enige og smiler grundet tydeligheden herfor)

Kommentarer til Pris vs. Kvalitet

Michael: Louis Nielsen ligger vel nogenlunde samme sted.

Jette: Jeg tror, at resten heroppe kommer til at ligge mere ens.

(flertallet er enige)

Kim: Det er meget fra butik til butik

Hvordan opfatter I forskellen med kvalitet og service?

Jette: Kvalitet må være af produktet, altså af glasset og stellet for det er det samme alle steder.

(alle er enige)

Kommentarer til Pris vs. Udvalg

Lone: Der må Louis Nielsen vel rykke en del op ad

(alle er enige)

Jette: Er det ikke igen, meget ens.

Kim: Jeg har nu indtryk af, at Profil har større udvalg

Kommentarer til Service vs. Udvalg

Leif: Hvad med Louis Nielsen, de ligger vel ikke på samme højde, som de andre på service. Et eller andet sted må der spares.

(alle er enige)

Jette: Men de har lige så stort udvalg.

Appendix 11: Media spend in the Optician Retail Sector in 2009 - 2010

	Print	Outdoor	Radio	TV	Biograf	Totale	
Louis Nielsen	10.222.056,00	11.099.349,00	12.215.965,00	52.326.694,00	472.000	**86.336.064,00**	
Nyt Syn	1.634.833,00	29.333,00	-	4.006.635,00	-	**5.670.801,00**	
Profil Optik	5.924.764,00	12.800,00	-	24.241.673,00	-	**30.179.237,00**	
Synoptik	2.916.110,00	4.577.505,00	-	34.976.933,00	-	**42.470.548,00**	
Thiele	7.839.331,00	8.091.508,00	68.544,00	3.922.873,00	-	**19.922.256,00**	
Totale	**28.537.094,00**	**23.810.495,00**	**12.284.509,00**	**119.474.808,00**	**472.000**	**184.578.906,00**	The 5 brands in all
						234.858.035,00	The optician retailers in all

Appendix 12: Image Attributes prioritized from Focus Groups

1 – 5, hvor 1 er vigtigst.

Focus Group 20-40

Service:	3, 2, 1, 1, 1, 1	Gennemsnit: 1,5
Pris:	5, 1, 4, 4, 3, 4	Gennemsnit: 3,5
Indretning og Atmosfære:	4, 5, 5, 5, 0, 5	Gennemsnit: 4,8
Udvalg:	2, 3, 3, 3, 4, 3	Gennemsnit: 3
Beliggenhed:	1, 4, 2, 2, 2, 2	Gennemsnit: 2,2

Focus Group 40+

Service:	1, 1, 1, 1, 1, 2, 1, 1	Gennemsnit: 1,1
Pris:	2, 2, 2, 3, 3, 2, 3, 3	Gennemsnit: 2,5
Indretning og Atmosfære:	4, 4, 4, 2, 5, 5, 4, 4	Gennemsnit: 4
Udvalg:	3, 3, 3, 4, 4, 3, 1, 5	Gennemsnit: 3,2
Beliggenhed:	5, 5, 5, 5, 2, 4, 5, 2	Gennemsnit: 4,2

Appendix 13: Free Brand Associations from Focus Groups

Focus Group 20-40

Louis Nielsen:	Billigt, Netto-agtigt – negativt. Ikke så kompetente Discount og dårlige reklamer. Billigt, 2 briller for ens pris. Billigt, Nyt – ny kæde, intetsigende Grøn, reklamen, spejl? Billig, Fint udvalg, God service
Nyt Syn:	Ingen kommentarer
Profil Optik:	Nykøbing -> Lille Butik, Venlige overfor min mor men ikke mig, Butiksansatte med moderigtige briller på. (Er lidt i tvivl om jeg tager fejl af kæderne. Ok venlige, Blå facade, Brugte dem da jeg var yngre – så tænker på dem som ”gammeldags” Tæt på, God reklame men ukendt for mig
Synoptik:	Størst, Kompetente optikere, Bredt udvalg. Lars Hjortshøj og Briller til alle. Mange briller, husker reklamer med Lars Hjortshøj, Stor kæde Kendt, ”ligger alle vegne”, synlig markedsføring. Grøn, God service, Gratis kontaktlinser på prøvetid Stor, Dyr, Godt udvalg
Thiele:	Unge ansattes -> Den på Købmagergade, Lidt kold, Travle. Kvalitet og Bredt udvalg Stor Kæde Synlig, ”Ligger alle vegne”, Venlige, Serviceminded Ville ikke foretrække at gå ind hos dem da jeg ikke har god/positive service erfaring hos dem. Ukendt men ved det er en stor kæde.

Focus Group 40+

Louis Nielsen:

Billig, mindre service
Discount, nyt, lille
Billig, mange reklamer
Billig, ikke god service, vil jeg ikke bruge
Billig, nok ikke god service
Billigere end Synoptik
Billig, reklamer
Billig, måske ikke så stort udvalg

Nyt Syn:

Kender ikke butikken
?, øjenlæge
Kender dem ikke
Kender jeg ikke, hørt navnet men ingen erfaring
Kender jeg ikke rigtigt
Siger mig intet
Kendt brilleforretning (gammel), men hvor ligger der en?
Kender den ikke

Profil Optik:

Kvalitet, højere priser, faglig kompetence, uddannet personale
Private label, niche, begrænset udvalg
Reklamer, fokus på pris
Kender jeg men ikke som kunde, vil jeg kigge i næste gang
God service, stort udvalg, pæne forretninger, lidt dyr
Blander den sammen med andre, kender navnet men ved ikke hvordan de skiller sig ud
Ikke så kendt
Anerkendt, dyr ende, stor kæde, ofte reklamer

Synoptik:

Kvalitet, stor kæde, bredt sortiment
Gammel kending, tradition, lidt støvet, TV reklamer
Været mange år i branchen, pris efter alder, bredt udvalg
Første optiker jeg brugte, god service, lidt dyr, ufleksibel omkring priser
Rimelig pris, stort udvalg, gode løsninger/service
Tit tilbud, fx rabatalder, dem med den grønne farve
Stor kæde, mange reklamer
Anerkendt, dyr ende, stor kæde, ofte reklamer

Thiele:

Stor kæde, kompetent personale, bredt sortiment, høj pris, men tilbud
Den nye kendte, vil gerne være moderne, TV reklamer
Været i branchen i mange år, kvalitet, bredt udvalg
Anden optiker jeg brugte til nye gals, fleksibel med priser, god service
Stort udvalg, rimelig priser, god service
Ligner Synoptik, ikke fremme med tilbud
Kendt forretning, god service, her er jeg kunde. Anerkendt, dyre ende, stor kæde, ofte reklamer

Appendix 14: Brand Characteristics 20-40 year old - Results

Du bedes sætte kryds ud for de ord, som du synes passer til mærket. (Find gerne 3-5 ord til hvert mærke.)

	Louis Nielsen	Nyt Syn	Profil Optik	Synoptik	Thiele
Familieorienteret					
Ærlig	1				
Reel					
Original		1			
Glad					
Venlig	1			1	2
Modig	1				
Kvalitetsbevidst			1	2	2
Detaljeorienteret				1	
Trendy				1	2
Spændende					
Energisk					
Fræk					
Ung					2
Støvet		2	1		
Kedelig			2		
Gammel		1	3		1
Down-to-earth					
Unik					
Up-to-date				1	
Innovativ					
Uafhængig		1			
Sikker				3	
Intelligent			1		
Teknisk					
Succesfuld	1			2	
Leder				1	1
Selvsikker			1		1
Value for money	4			1	
Billig	6				
Discount	3				
Eksklusiv					1
Glamuriøs					
Charmerende					
Feminin					
Maskulin					
Blød					1
Cool					
Forsigtig		2	1	1	1
Usikker	1				
Professionel	1			5	3
Erfaren				1	1
Faglig				2	
Imødekommende	1			2	

Focus Group 20-40

Louis Nielsen:	6 x Billig, 4 x Value for money, 3 x Discount, Ærlig, Venlig, Modig, Succesfuld, Usikker, Professionel og Imødekommende
Nyt Syn:	2 x Forsigtig, 2 x Støvet, Gammel, Uafhængig og Original.
Profil Optik:	3 x Gammel, 2 x Kedelig, Ærlig, Støvet, Selvsikker, Forsigtig, Kvalitetsbevidst og Intelligent.
Synoptik:	5 x Professionel, 3 x Sikker, 2 x Kvalitetsbevidst, 2 x Succesfuld, 2 x Faglig, 2 x Familieorienteret, 2 x Imødekommende, Leder, Forsigtig, Venlig, Value for Money, Up-to-date, Erfaren, Detaljeorienteret og Trendy.
Thiele:	3 x Professionel, 2 x Trendy, 2 x Venlig, 2 x Ung, 2 x Kvalitetsbevidst, Eksklusiv, Leder, Blød, Gammel, Modig, Selvsikker, Forsigtigt og Erfaren

Appendix 15: Brand Characteristics 40+ year old - Results

Du bedes sætte kryds ud for de ord, som du synes passer til mærket. (Find gerne 3-5 ord til hvert mærke.)

	Louis Nielsen	Nyt Syn	Profil Optik	Synoptik	Thiele
Familieorienteret	2		1	4	4
Ærlig					
Reel			2		1
Original			3		1
Glad	2				1
Venlig				1	1
Modig	1				
Kvalitetsbevidst			3	4	3
Detaljeorienteret					1
Trendy			2	1	1
Spændende			1		
Energisk	1				1
Fræk	1				
Ung	1		1		
Støvet				1	
Kedelig	2				
Gammel			1	2	1
Down-to-earth	1			1	
Unik					
Up-to-date			2	2	2
Innovativ	1				2
Uafhængig			1		1
Sikker			1	2	1
Intelligent					
Teknisk				1	
Succesfuld	1		1	1	1
Leder					
Selvsikker				2	
Value for money	2		1		
Billig	8				
Discount	3				
Eksklusiv			2		1
Glamuriøs					
Charmerende					
Feminin					
Maskulin					
Blød					
Cool					
Forsigtig					
Usikker	1				
Professionel			4	4	4
Erfaren	1		2	4	5
Faglig			3	3	4
Imødekommende	1		1	1	2

Focus Group 40+

Louis Nielsen:	8 x billig, 3 x Discount, 2 x Value for money, 2 x Familieorienteret, 2 x Glad, 2 x Kedelig, Usikker, Down-to-Earth, Modig, Energisk, Fræk, Innovativ, Erfaren, Ung, Imødekommende, Succesfuld
Nyt Syn:	Ingen kommentarer
Profil Optik:	4 x Professionel, 3 x Kvalitetsbevidst, 3 x Faglig, 3 x Original, 2 x Reel, 2 x Trendy, 2 x Erfaren, 2 x Up-to-date, Imødekommende, Høj pris, Uafhængig, Value-for money, Spændende, Eksklusiv, Familieorienteret, Ung, Sikker, Gammel, Succesfuld
Synoptik:	4 x Professionel, 4 x Kvalitetsbevidst, 4 x Familieorienteret, 4 x Erfaren, 3 x Faglig, 2 x Gammel, 2 x Selvsikker, 2 x Up-to-date, Succesfuld, Sikker, Imødekommende, Støvet, Down-to-earth, Reel, Venlig, Sikker, Teknisk, Trendy
Thiele:	5 x Erfaren, 4 x Professionel, 4 x Faglig, 4 x Familieorienteret, 3 x Kvalitetsbevidst, 2 x Imødekommende, 2 x Innovativ, 2 x Up-to-date, Høj pris, Energisk, Glad, Original, Uafhængig, Reel, Venlig, Detaljeorienteret, Sikker, Teknisk, Trendy, Succesfuld, Gammel

Appendix 16: Evaluation of the Optician Retailers – Results

Focus Group 20 – 40

	Service	Indretning og Atmosfære	Udvalg	Kvalitet	Pris	Tilgængelighed
Louis Nielsen	3,2	2,7	2,8	2,5	1,5	3,8
Nyt Syn	3,0	3,3	3,2	2,8	3,0	2,3
Profil Optik	3,0	3,2	3,2	3,0	3,5	2,8
Synoptik	4,5	4,5	4,2	4,5	4,0	4,8
Thiele	3,8	3,8	3,8	4,2	4,0	3,7

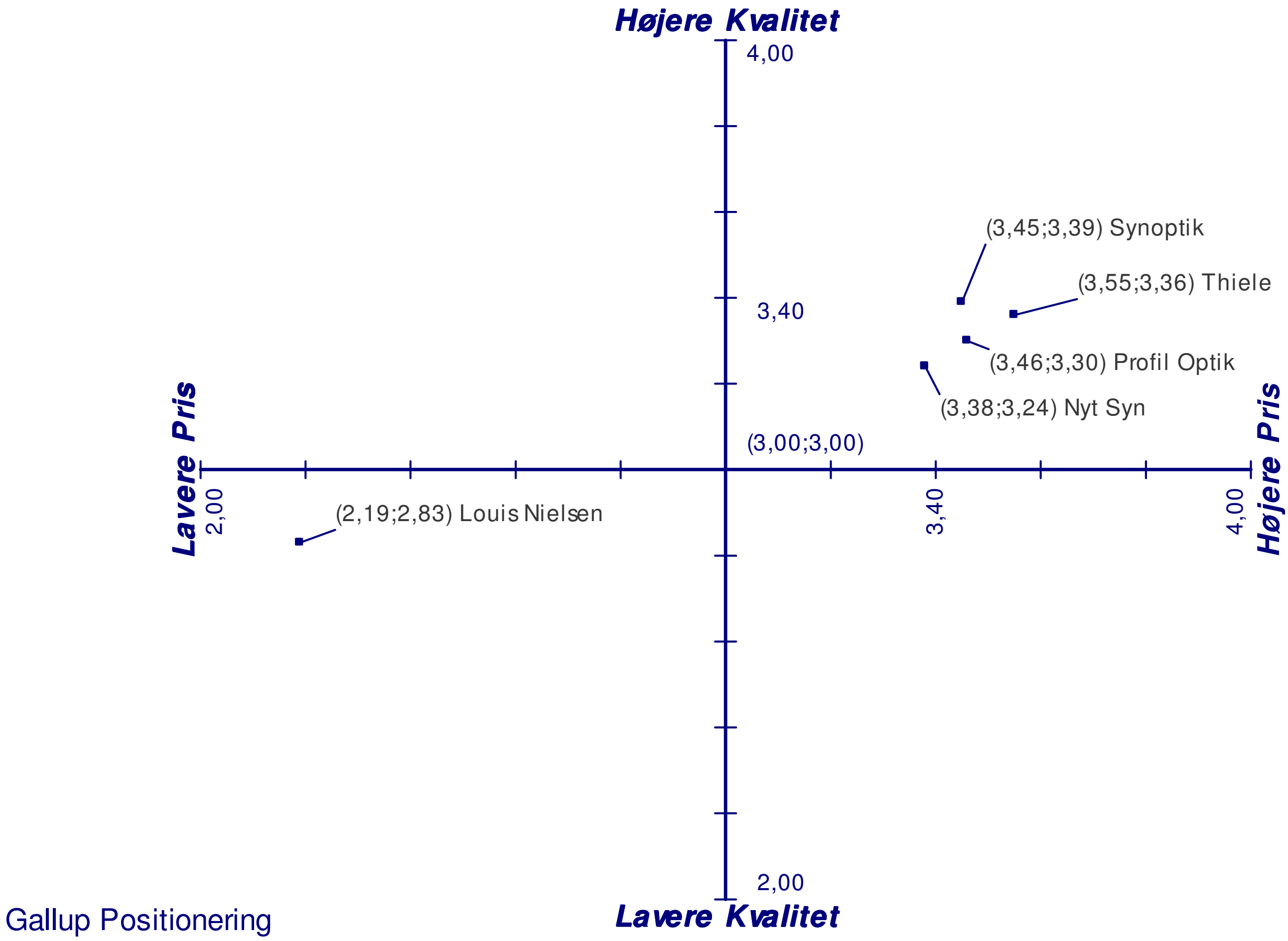
Focus Group 40+

	Service	Indretning og Atmosfære	Udvalg	Kvalitet	Pris	Tilgængelighed
Louis Nielsen	2,6	3,1	2,9	2,5	1,6	3,5
Nyt Syn	3,0	3,0	3,0	3,0	3,0	0,1
Profil Optik	3,8	3,8	4,0	4,0	3,9	3,0
Synoptik	3,9	3,4	4,0	3,9	4,3	4,3
Thiele	4,0	3,9	4,4	4,3	4,4	4,1

Appendix 17: Perceptual Map from TNS Gallup 2009

Universe: 20-40 year old with Glasses

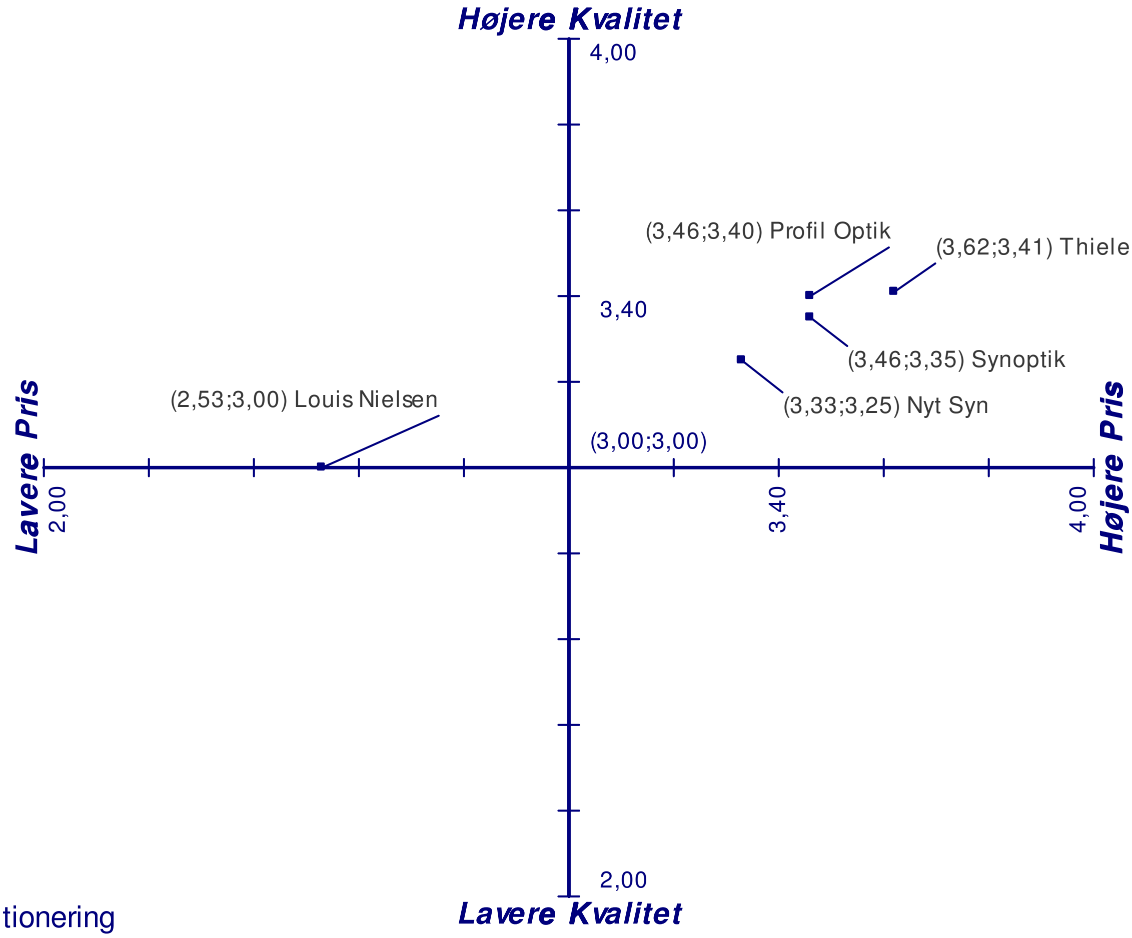
Undersøgelse :Index DK/Gallup Marketing/Mærke lang (B) hh 2009
Univers :Alle personer <Alle perioder> : 4717 Stikprøve : 4144
Målgruppe :20-40 + briller : 496



	Målgruppe
Kvalitet	**20-40**
Louis Nielsen	2,83
Nyt Syn	3,24
Profil Optik	3,30
Synoptik	3,39
Thiele	3,36
Pris	
Louis Nielsen	2,19
Nyt Syn	3,38
Profil Optik	3,46
Synoptik	3,45
Thiele	3,55

Universe: 40+ year old with glasses

Undersøgelse	:Index DK/Gallup Marketing/Mærke lang (B) hh 2009
Univers	:Alle personer <Alle perioder> : 4717 Stikprøve : 4144
Målgruppe	:40+ med briller : 2.801

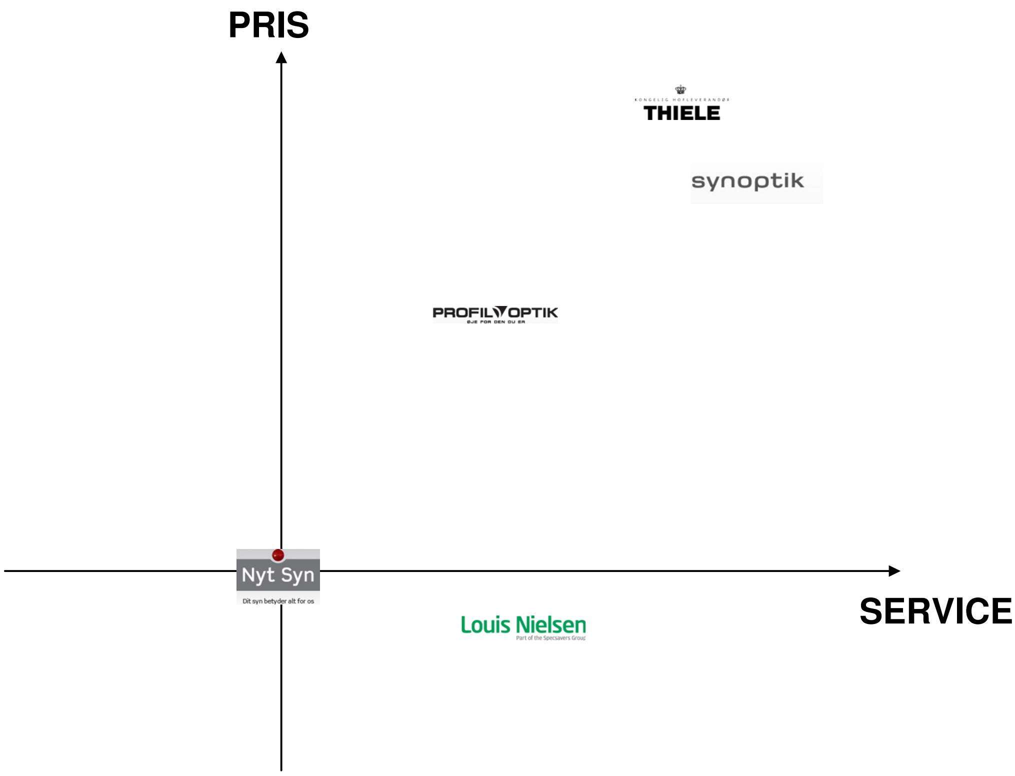


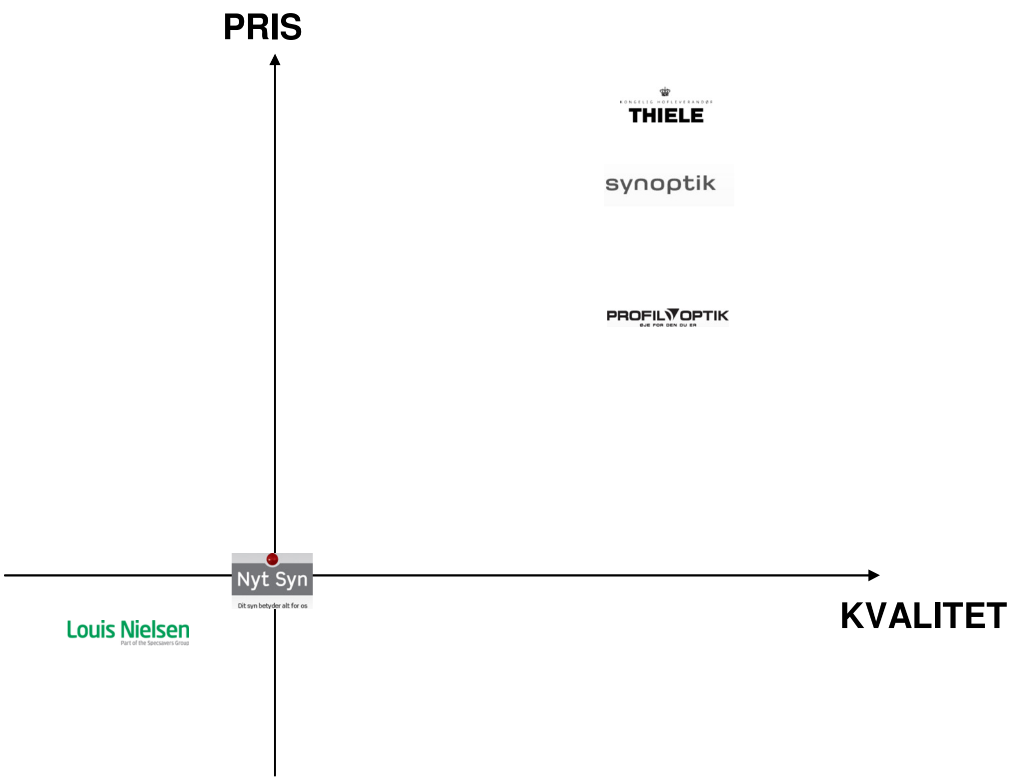
Gallup Positionering

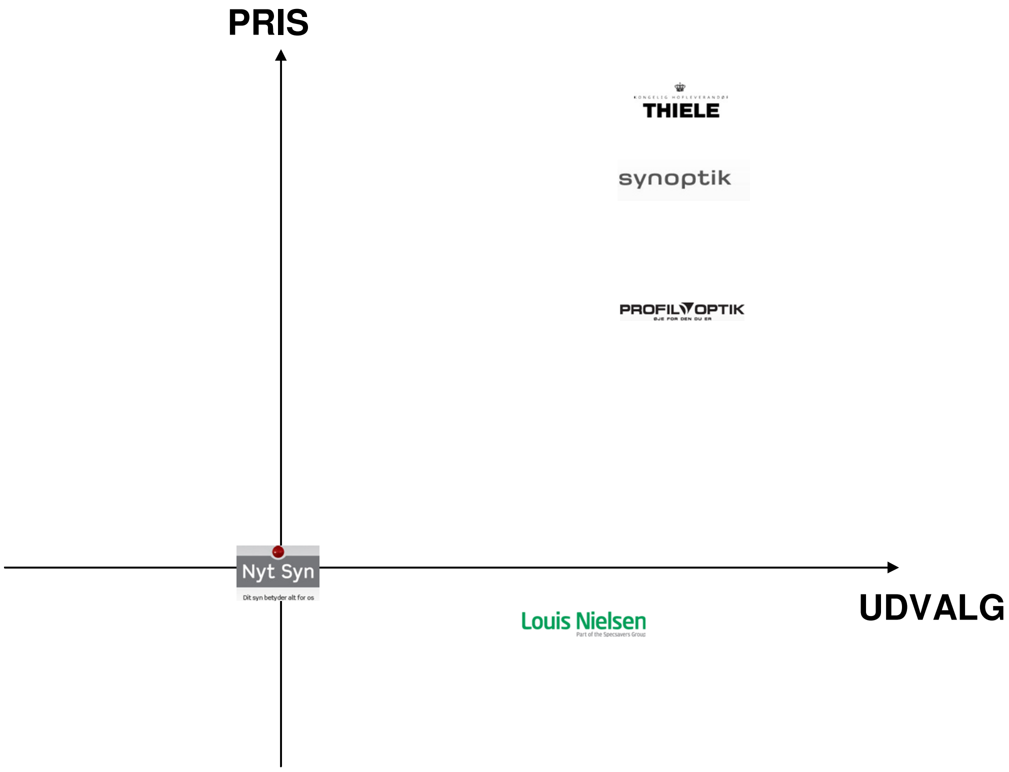
	Målgruppe 40+
Kvalitet	
Louis Nielsen	3,00
Nyt Syn	3,25
Profil Optik	3,40
Synoptik	3,35
Thiele	3,41
Pris	
Louis Nielsen	2,53
Nyt Syn	3,33
Profil Optik	3,46
Synoptik	3,46
Thiele	3,62

Appendix 18: Perceptual Maps from Exercise

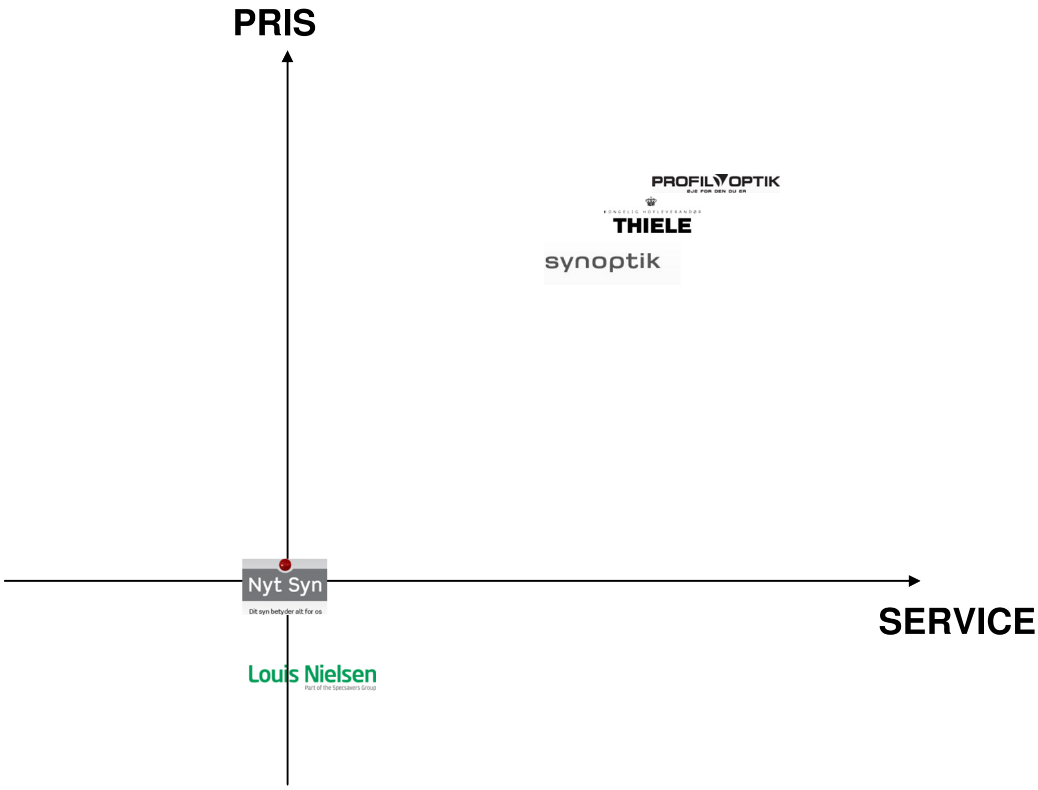
Focus Group 20-40

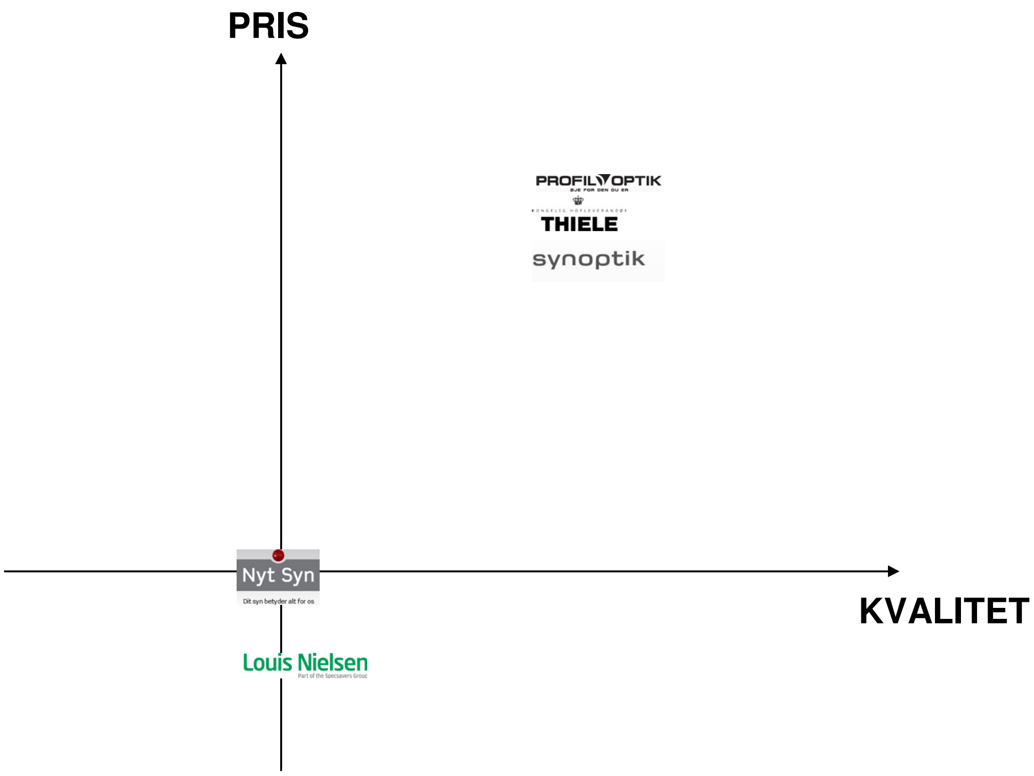


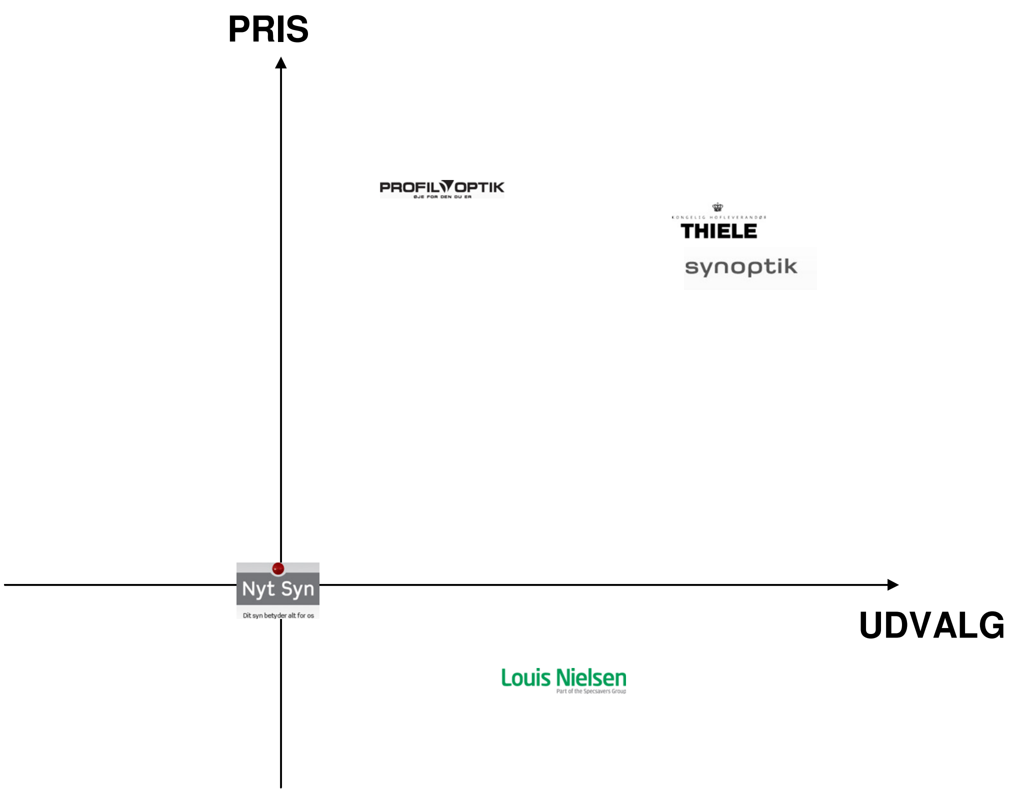




Focus Group 40+



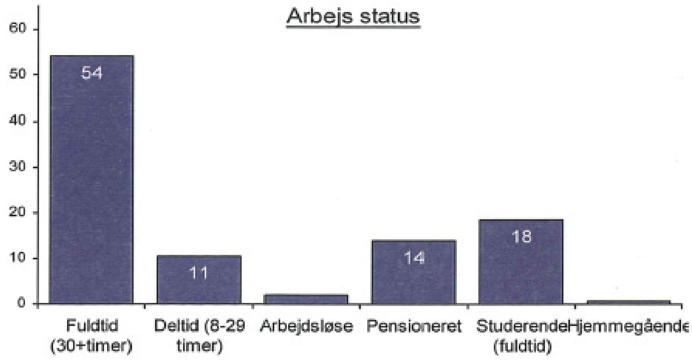

PRIS
PROFILOPTIK
THIELE
synoptik
Nyt Syn
KVALITET
Louis Nielsen

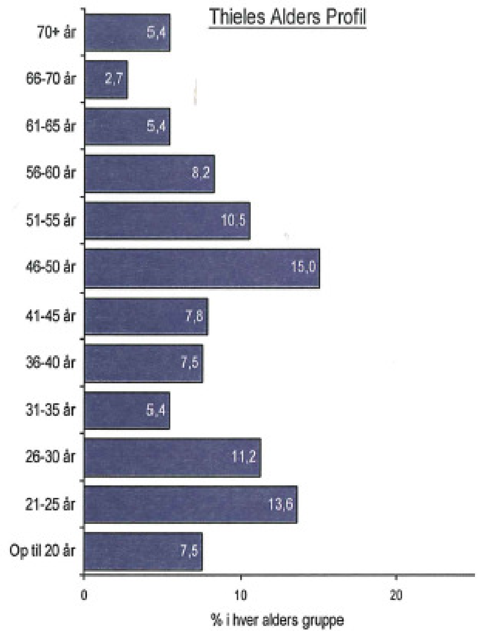

PRIS
PROFILOPTIK
THIELE
synoptik
Nyt Syn
UDVALG
Louis Nielsen

Appendix 19: Survey by Thiele. – Age Profile of Thiele's Customers

Thiele tiltrækker kunder I alle aldre

- 66% af Thieles kunder er kvinder
- Størstedelen arbejder fuldtid. Et stort antal er studerende.





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Appendix 20: Gallup Kompas Segments compared between East vs. West

Undersøgelse: Index DK/Gallup Marketing/Mærke lang (B) 2h 2009
Univers ('000): 4.717
Delunivers: Alle personer <Alle perioder>
Delunivers størrelse ('000): 4.717
Målgruppe: Alle personer
Målgruppe størrelse ('000): 4.717 Stikprøve: 2.028
Procent: 100%

		Total	Vest 20+ med brille	Øst 20+ med brille
Total	Opregnet000	4.717	1.513	1.243
	Stikprøve	2.028	846	617
	Lodret%	100	100	100
Moderne	Opregnet000	475	133	129
	Stikprøve	171	65	47
	Lodret%	10	9	10
Moderne-individorienterede	Opregnet000	661	145	107
	Stikprøve	207	68	47
	Lodret%	14	10	9
Individorienterede	Opregnet000	521	162	103
	Stikprøve	185	82	42
	Lodret%	11	11	8
Traditionelle-individorienterede	Opregnet000	499	195	86
	Stikprøve	200	95	48
	Lodret%	11	13	7
Traditionelle	Opregnet000	567	242	196
	Stikprøve	272	124	99
	Lodret%	12	16	16
Traditionelle-fællesskabsorienterede	Opregnet000	481	202	170
	Stikprøve	264	133	90
	Lodret%	10	13	14
Fællesskabsorienterede	Opregnet000	560	186	207
	Stikprøve	283	116	110
	Lodret%	12	12	17
Moderne-fællesskabsorienterede	Opregnet000	426	96	144
	Stikprøve	231	70	86
	Lodret%	9	6	12
Centergruppe	Opregnet000	527	152	101
	Stikprøve	215	93	48
	Lodret%	11	10	8

Appendix 21: Optician Customers distributed by Gallup Kompas Segments

Undersøgelse: Index DK/Gallup Marketing/Mærke lang (B) 2h 2009
Univers ('000): 4.717
Delunivers: Alle personer <Alle perioder>
Delunivers størrelse ('000): 4.717
Målgruppe: 20+ med brille
Målgruppe størrelse ('000): 2.756 Stikprøve: 1.463
Procent: 58%

			Gallup Kompas								
			Moderne	Moderne-individ-orienterede	Individ-orienterede	Traditio-nelle-individ-orienterede	Traditio-nelle	Traditionelle-fællesskabs-orienterede	Fællesskabsorienterede	Moderne-fællesskabs-orienterede	Center-gruppe
Total		Opregnet000	261	253	265	281	438	372	393	240	253
		Stikprøve	112	115	124	143	223	223	226	156	141
		Lodret%	100	100	100	100	100	100	100	100	100
Optikkæde - bruger Louis Nielsen	Plejer at bruge	Opregnet000	55	27	50	25	40	29	31	48	20
		Stikprøve	23	17	18	18	18	21	20	23	17
		Lodret%	21	11	19	9	9	8	8	20	8
	Bruger af og til	Opregnet000	22	12	21	17	32	21	28	11	21
		Stikprøve	9	10	11	5	13	16	18	16	12
		Lodret%	8	5	8	6	7	6	7	5	8
	Brugt tidligere men ej mere	Opregnet000	27	16	26	16	39	22	42	22	21
		Stikprøve	14	5	16	10	18	18	20	10	9
		Lodret%	10	6	10	6	9	6	11	9	8
	Har aldrig brugt	Opregnet000	145	167	143	123	214	188	234	133	167
		Stikprøve	58	71	66	73	121	115	143	86	88
		Lodret%	55	66	54	44	49	51	60	55	66
	Ved ikke	Opregnet000	3	6	0	25	62	23	9	5	5
		Stikprøve	1	2	1	9	20	12	5	1	3
		Lodret%	1	3	0	9	14	6	2	2	2
	Kender ej kæden	Opregnet000	10	24	25	75	51	88	48	21	20
		Stikprøve	7	10	12	28	33	41	20	20	12
		Lodret%	4	9	9	27	12	24	12	9	8
Optikkæde - bruger Nyt Syn	Plejer at bruge	Opregnet000	10	24	12	9	43	14	13	9	10
		Stikprøve	6	5	5	6	16	12	8	5	6
		Lodret%	4	10	4	3	10	4	3	4	4
	Bruger af og til	Opregnet000	14	6	11	31	64	23	36	7	14
		Stikprøve	6	3	7	13	22	17	13	6	11
		Lodret%	6	2	4	11	15	6	9	3	5
	Brugt tidligere men ej mere	Opregnet000	12	40	11	12	48	6	38	33	25
		Stikprøve	11	11	10	6	18	10	24	13	11
		Lodret%	5	16	4	4	11	2	10	14	10
	Har aldrig brugt	Opregnet000	140	94	166	114	146	158	198	117	150
		Stikprøve	62	59	72	69	97	99	110	74	74
		Lodret%	54	37	63	40	33	43	50	49	59
	Ved ikke	Opregnet000	0	6	0	20	42	30	3	0	3
		Stikprøve	0	2	1	10	14	15	3	0	3
		Lodret%	0	3	0	7	10	8	1	0	1
	Kender ej kæden	Opregnet000	85	82	65	95	95	141	106	75	51
		Stikprøve	27	35	29	39	56	70	68	58	36
		Lodret%	32	32	25	34	22	38	27	31	20
Optikkæde - bruger Profil Optik	Plejer at bruge	Opregnet000	10	24	15	52	46	39	36	20	33
		Stikprøve	11	21	12	21	28	26	23	15	22
		Lodret%	4	9	6	19	10	11	9	8	13
	Bruger af og til	Opregnet000	22	17	29	31	64	42	53	19	40
		Stikprøve	9	12	17	11	26	29	27	15	22
		Lodret%	9	7	11	11	15	11	13	8	16
	Brugt tidligere men ej mere	Opregnet000	30	64	39	27	49	34	47	46	34
		Stikprøve	21	23	24	19	29	19	34	30	18
		Lodret%	12	26	15	10	11	9	12	19	13
	Har aldrig brugt	Opregnet000	192	126	161	97	159	150	201	146	125
		Stikprøve	65	52	64	63	96	97	116	84	66
		Lodret%	74	50	61	35	36	40	51	61	49
	Ved ikke	Opregnet000	3	6	0	34	54	22	4	0	10
		Stikprøve	1	2	1	14	18	14	5	0	5
		Lodret%	1	3	0	12	12	6	1	0	4
	Kender ej kæden	Opregnet000	4	15	20	40	65	85	52	10	11
		Stikprøve	5	5	6	15	26	38	21	12	8
		Lodret%	2	6	8	14	15	23	13	4	4

			Gallup Kompas								
			Moderne	Moderne-individ-orienterede	Individ-orienterede	Traditio-nelle-individ-orienterede	Traditio-nelle	Traditionelle-fællesskabs-orienterede	Fællesskabsorienterede	Moderne-fællesskabs-orienterede	Center-gruppe
Optikkæde - bruger Synoptik	Plejer at bruge	Opregnet000	50	60	34	26	88	69	66	40	36
		Stikprøve	14	16	14	20	48	35	35	25	16
		Lodret%	19	24	13	9	20	19	17	17	14
	Bruger af og til	Opregnet000	29	42	24	46	92	44	57	36	37
		Stikprøve	21	19	21	20	35	37	40	25	20
		Lodret%	11	17	9	16	21	12	15	15	14
	Brugt tidligere men ej mere	Opregnet000	74	76	80	44	91	63	129	41	60
		Stikprøve	37	34	33	20	44	43	72	35	43
		Lodret%	28	30	30	16	21	17	33	17	24
	Har aldrig brugt	Opregnet000	102	55	113	84	90	117	113	120	106
		Stikprøve	35	36	50	58	61	70	70	67	54
		Lodret%	39	22	43	30	20	32	29	50	42
	Ved ikke	Opregnet000	3	6	1	27	38	28	7	0	9
		Stikprøve	1	2	2	13	20	14	3	0	4
		Lodret%	1	3	0	10	9	8	2	0	4
	Kender ej kæden	Opregnet000	3	14	13	54	39	50	20	4	5
		Stikprøve	4	8	4	12	15	24	6	4	4
		Lodret%	1	5	5	19	9	14	5	2	2
Optikkæde - bruger Thiele	Plejer at bruge	Opregnet000	34	24	8	12	17	12	58	7	13
		Stikprøve	8	10	7	5	12	10	19	9	7
		Lodret%	13	9	3	4	4	3	15	3	5
	Bruger af og til	Opregnet000	14	28	19	25	28	22	35	16	27
		Stikprøve	10	9	11	6	11	14	27	15	10
		Lodret%	6	11	7	9	6	6	9	7	11
	Brugt tidligere men ej mere	Opregnet000	46	36	22	19	20	41	37	29	38
		Stikprøve	14	21	15	9	10	17	24	23	15
		Lodret%	18	14	8	7	5	11	9	12	15
	Har aldrig brugt	Opregnet000	139	129	174	107	225	175	226	170	131
		Stikprøve	68	57	69	70	122	114	133	89	76
		Lodret%	53	51	66	38	51	47	58	71	52
	Ved ikke	Opregnet000	3	0	0	18	52	26	6	5	7
		Stikprøve	1	0	1	10	17	13	2	1	4
		Lodret%	1	0	0	7	12	7	1	2	3
	Kender ej kæden	Opregnet000	25	37	42	101	96	96	32	13	38
		Stikprøve	11	18	21	43	51	55	21	19	29
		Lodret%	10	15	16	36	22	26	8	5	15