

A Work Project, presented as part of the requirements for the Award of a Master's degree in Management from the Nova School of Business and Economics.

“HOW TO MAKE THE END CONSUMER PROUD TO WEAR ZEISS LENSES?”

The Consumer Decision Journey

Matilde Sarmiento 54187

Work project carried out under the supervision of Professor Vera Herédia Colaço

30-12-2023

Abstract Group Part

This report addresses a challenge proposed by ZEISS Vision Care in Portugal “How to make the end consumer proud to wear ZEISS lenses?”

A marketing plan is proposed based on primary and secondary research, illuminating consumer shopping behaviour in the Portuguese eyewear market.

Findings underscore the importance of strategic investments in brand awareness, market education, and post-purchase services, to successfully foster consumer pride. Furthermore, the research offers ZEISS actionable insights to establish itself as a brand of choice among the intended audience.

Abstract Individual Part

ZEISS wants to establish itself as a brand that its customers are proud to wear. A critical element in accomplishing this goal is gaining a comprehensive understanding of the Consumer Decision Journey. Therefore, the company’s actions must be strategically aligned with consumer demands.

The market identified opportunity segments highlight the significance of a customized strategy that takes into account the wide range of consumer preferences. With the changing perspective of customer behavior, ZEISS dedication to strengthening brand recognition, and providing post-purchase satisfaction becomes increasingly important for long-term success.

Keywords: Consumer Behaviour, Marketing Plan, Market Research, Brand Awareness

This work used infrastructure and resources funded by Fundação para a Ciência e a Tecnologia (UID/ECO/00124/2013, UID/ECO/00124/2019 and Social Sciences DataLab, Project 22209), POR Lisboa (LISBOA-01-0145-FEDER-007722 and Social Sciences DataLab, Project 22209) and POR Norte (Social Sciences DataLab, Project 22209).

Executive Summary

Objective

This report navigates the challenge of fostering a sense of pride among consumers in choosing ZEISS lenses for eyewear. The project aims to position ZEISS lenses as an aspirational brand, encouraging customers to actively seek them out in optical stores, rather than relying solely on eye care professionals' recommendations.

Current Landscape

At present, ZEISS lenses and other brands in the market face a challenge in gaining recognition during eyewear purchases. They are often overshadowed by the emphasis on fashion and style of the frames. The prevalent focus on fashion during decision-making diminishes the significance of choosing lenses.

Key Research Questions

This report is focused in answering the following research questions:

- How can the brand increase awareness among consumers regarding the importance of vision care and eye health?
- Which strategies effectively communicate the value and advanced technology embedded in ZEISS lenses?
- How can the brand cultivate a sense of pride in consumers when choosing ZEISS lenses?

Challenges

A significant challenge involves reshaping the perception of eyewear, shifting focus away from mere fashion and towards highlighting high-tech functionality and health benefits. There is a crucial need to raise awareness about different lenses brands and the broader importance of vision health.

Strategies and Recommendations

To overcome these challenges, this report advocates a comprehensive strategy. This approach proposes a set of marketing initiatives, including consumer education and a narrative change targeted at Millennials and Gen Z audiences, positioning ZEISS lenses as integral components of high-tech and health-focused eyewear.

Conclusion

The goal is to establish ZEISS as a lens brand that customers are proud to wear by carefully considering these dimensions. This entails recognising the allure of fashion while emphasising technological innovations and highlighting their beneficial effects on eye health.

This transitional strategy is essential because it not only positions ZEISS as a brand that caters to modern consumers' needs, but it also completely changes the way that consumers view the eyeglass industry.

Table of Contents

| | |
|---|-----------|
| 1. Introduction | 6 |
| 1.1. Background | 6 |
| 1.2. The Challenge..... | 7 |
| 2. ZEISS & ZEISS Vision Care | 8 |
| 2.1. Company Overview..... | 8 |
| 2.1.1. Main Milestones..... | 9 |
| 2.1.2. Marketing & Sales | 10 |
| 2.2. Business Framework | 11 |
| 2.2.1. Business Unit & Portfolio | 11 |
| 2.2.2. Business Model..... | 14 |
| 2.2.3. Value Proposition..... | 15 |
| 2.3 Branding..... | 16 |
| 2.3.1. Brand Architecture..... | 16 |
| 2.3.2. Brand Equity..... | 17 |
| 2.3.3. Brand Elements..... | 18 |
| 2.3.4. Brand Identity..... | 20 |
| 2.4. SWOT Analysis | 23 |

| | |
|--|-----------|
| 3. Market Dynamics | 24 |
| 3.1. Market Overview | 24 |
| 3.1.1. Market trends | 24 |
| 3.1.2. The Context: Portuguese market of optical stores | 26 |
| 3.2. Competition Analysis | 27 |
| 3.3. PESTEL Analysis | 29 |
| 4. Market Research and Methodology | 34 |
| 4.1. Quantitative data: Survey | 34 |
| 4.1.1 Method and Sample | 34 |
| 4.1.2 Main Findings | 35 |
| 4.1.3 Limitations | 43 |
| 4.2 Qualitative data: Interview | 43 |
| 4.2.1 Method and Sample | 43 |
| 4.2.2 Main Findings | 44 |
| 4.2.3 Limitations | 49 |
| 5. The Consumer Decision Journey | 50 |
| 5.1. Recommendations | 55 |
| 6. Marketing Plan | 61 |
| 6.1. Market Position: STP | 61 |

| | | |
|---------------|---|------------|
| 6.1.1. | Segmentation..... | 62 |
| 6.1.2. | Targeting | 66 |
| 6.1.3. | Positioning..... | 69 |
| 6.2. | Marketing Objectives, Goals and KPIs..... | 71 |
| 6.3. | P&L Forecast | 75 |
| 6.4. | Marketing Communications Plan & Creative Strategy..... | 79 |
| 6.5. | Media Strategy | 92 |
| 6.5.1. | Media Budget | 93 |
| 6.5.2. | Media Timeline | 98 |
| 6.6. | Other Recommendations | 99 |
| 7. | Conclusion | 102 |
| 8. | Appendix..... | 116 |

1. Introduction

1.1. Background

In an era where fashion is often the main focus in the eyewear industry, the significance of the lenses themselves has, to a large extent, remained in the shadows.

This Work Project undertaken by students pursuing Nova SBE's Master's in Management program, guided by the advisor Vera Herédia Colaço, explores the intriguing reality of how eyewear is perceived, with a specific focus on ZEISS Vision Care in Portugal.

This project starts with a central research question: How to make the end consumer proud to wear ZEISS lenses? In a market saturated with choices, where frames often overshadow the value of lenses, the assigned mission is to redefine the perception surrounding eyewear, aiming to inspire ZEISS lenses with aspirational qualities that extend beyond functionality.

The challenge addressed is not only about developing a marketing campaign and its initiatives. As a high-tech and health-oriented accessory, the lenses must go beyond their current function as a secondary consideration when purchasing eyeglasses. The current scenario, as observed by ZEISS Vision Care, indicates that both end consumers and optometrists often prioritise frames over lenses.

The objective is to shift this pattern. The goal is to understand how to make ZEISS lenses a conscious and proud choice for consumers, emphasising the importance of lenses technology, health benefits, sustainability impact, and overall quality.

Throughout this journey, it is acknowledged the unique position of the collaboration with ZEISS Vision Care in Portugal.

This partnership not only provides valuable insights into the challenges faced by the industry but also allows to propose practical and implementable solutions for the brand's growth.

Furthermore, there is a need to analyse consumer behaviour patterns in the eyecare industry by gathering qualitative data and analysis, such as conducting interviews with optometrists, to gain direct feedback on key topics. Quantitative data collection and analysis were also conducted via a survey to understand the brand's perception, purchasing incentives, willingness to pay, and the influence of the optometrist on purchasing decisions with 256 responses from the Portuguese population, out of which 197 were valid after filtering. Additionally, the market dynamics were also assessed via the development of suitable frameworks, and through understanding the consumer decision journey, to build an action case supporting a comprehensive marketing and communication campaign. Specifically, initiatives- both offline and online, suitable for the target audience, aiming to position ZEISS lenses as a symbol of technological prowess, health and sustainability consciousness, and, most importantly, individual pride.

1.2. The Challenge

The challenge proposed by ZEISS Vision Care Portugal lies in making end consumers proud to wear ZEISS lenses by developing a marketing campaign and initiatives to a demographic of 20 to 40-year-olds, the target audience, in the Portuguese market.

Within the B2B2C distribution model, there is a need to transform the perception of their lenses from functional necessities to aspirational and desirable products. This shift in mindset is crucial to the mission of establishing ZEISS lenses as a source of consumer pride.

Betting on a Pull Strategy: The approach focuses on implementing a pull strategy within the B2B2C framework. A pull marketing strategy is a method where a company aims to increase product demand by enticing and drawing consumers towards it (CFI Team). The goal is to make consumers actively seek the product, prompting retailers to stock it in response to direct consumer demand. Therefore, the aim is to draw consumers directly to ZEISS lenses. It involves engaging consumers, nurturing brand loyalty, and fostering a sense of pride in choosing our products tailored to meet the needs of the Portuguese market while aligning with current trends.

The focus will now shift to a thorough analysis of the company overview to comprehend the firm on a deeper level.

2. ZEISS & ZEISS Vision Care

2.1. Company Overview

ZEISS is a market-leading technology company that serves the optical and optoelectronics sectors globally. It is firmly founded in and devoted to accountability in all its endeavours. ZEISS performs in four business segments — Industrial Quality & Research, Medical Technology, Consumer Markets, and Semiconductor Manufacturing Technology with annual revenue of over 8.8 billion euros in fiscal years of 2021 and 2022 (ZEISS, n.d.).

It is used by the semiconductor industry, e-mobility providers, Nobel Prize recipients, medical facilities and ophthalmologists, filmmakers, and eye care professionals. Its optics are required to produce microchips, study infectious diseases, control the quality of windmills and electric vehicles, provide the finest care for brain and eye surgery, and develop Oscar-winning films (ZEISS, n.d.). Furthermore, the company is also dedicated to achieving ambitious sustainability goals, that will be developed further.

The company has a **strong focus on innovation combined with substantial optical expertise**. ZEISS pioneered medical technology and vision care with two significant inventions that combined medical and optical expertise in a way that is still unmatched in the world today. The world's first point-focal imaging precision eyeglass lenses, PUNKTAL, was introduced by ZEISS. It was a ground-breaking new design created using scientific concepts that would serve as the model for all contemporary lenses. For the first time, the lenses addressed the mechanics of human vision. ZEISS has been tackling the problem of giving its clients the best visual experience for more than a century. Now, it is a major player in the global market, operating in nearly 50 countries, with 42,000 employees worldwide that put up a lot of effort to meet and exceed consumer expectations.

ZEISS extends a comprehensive range of post-sales support services for its various consumer products. However, it is important to note that ZEISS Vision Care, specifically for eyewear lenses, primarily relies on direct customer contact for service. In contrast, ZEISS offers an extensive suite of services for other consumer products. These services include a Consumer Self-Service Portal, global repair services, product registration, a Download Centre, and an efficient process for ordering spare parts. This delineates the distinct approaches adopted for different product categories within ZEISS, ensuring a robust customer service experience.

2.1.1. Main Milestones

Regarding the key turning points of the company, it all started when Carl ZEISS established his ground-breaking workshop in 1846 and laid the groundwork for precision optics, and that was where ZEISS Vision Care had its modest beginnings. The founding of the Carl ZEISS Foundation in 1889 signalled a major turning point and underscored a strong dedication to innovation and excellence. A new era in vision correction was ushered in in 1912, largely thanks

to the pioneering work of ZEISS Vision Care. When ZEISS introduced progressive lenses with virtually similar optical qualities in 1987, it was a game-changing innovation that established new norms for the industry. With the release of its first individual lenses in 2000, ZEISS made a big advancement by better addressing the specific optical requirements of wearers. With the introduction of its toughest anti-reflective coating in 2011, ZEISS reached another significant milestone that improved the performance and durability of eyeglass lenses. And finally, at the beginning of 2018, ZEISS UVProtect technology was included as standard on all clear ZEISS plastic eyeglass lenses.

ZEISS Vision Care has consistently shown an unrelenting dedication to innovation, accuracy, and perfection over the course of its illustrious history. These achievements show a heritage of development and a commitment to raising people's quality of life all over the world by providing them with the best vision solutions.

After understanding the major turning points in ZEISS's history, it is necessary to review the company's marketing and sales plans, which will help to clarify the company's positioning in the industry and its efficient consumer outreach.

2.1.2. Marketing & Sales

ZEISS employs a comprehensive approach to marketing and sales, promoting its high-quality lenses to customers worldwide. The company continuously strives to enhance customer engagement, boost brand visibility, and provide excellent customer support.

The company regularly launches global marketing campaigns to promote its innovative products. An example is the 2021 campaign for ZEISS SmartLife Lenses (see Appendix 1 for an image of this campaign), which emphasises the benefits of wide fields of view and addresses the needs of spectacle lenses wearers. These campaigns aim to create brand awareness and

communicate product advantages. ZEISS recognises the importance of customer needs, and therefore, their marketing campaigns are designed to resonate with their target by highlighting how their products address real-life challenges, such as the strain caused by constant switching between digital devices.

Leveraging multiple marketing channels to reach its customers effectively with traditional marketing materials such as window displays, consumer brochures, and product websites, as well as a strong online presence and social media campaigns. Moreover, ZEISS acknowledges the significance of online marketing tools in today's digital age.

They also employ a dedicated sales force that interacts directly with customers, particularly in the business-to-business sector, where these professionals offer personalised service and consultation, helping customers choose the right products for their needs. Collaborating with partner opticians and providing them with marketing materials through the ZEISS Marketing Shop. This partnership strengthens ZEISS's distribution network and extends its reach to customers. A strong emphasis is made in ZEISS places for market research and to keep actively collecting customer feedback, this data is invaluable in shaping marketing strategies, product development, and enhancing customer experiences (see Appendix 2 for the other categories of ZEISS's value chain).

2.2. Business Framework

2.2.1. Business Unit & Portfolio

This Work Project is focused on ZEISS Vision Care's performance in their strategic business unit allocated to the Consumer Markets segment in Portugal.

ZEISS Vision Care develops and produces exceptional technological instruments and offerings for the entire eyeglass value chain. This involves creating, manufacturing, and selling premium eyeglass lenses, diagnostic tools, and services.

Regarding their products in the Consumer Markets segment ZEISS sells single vision lenses (glass, plastic), stock lenses (glass, plastic), lifestyle lenses for driving, office work, and digital natives. Moreover, contact lenses wearers, multifocal lenses (progressive, bifocal, trifocal), full UV protection in all clear and in all sun lenses, filter lenses (sunglass lenses, photochromic lenses, special filter lenses).

The company also specializes in magnifying visual aids for use in the medical and technological domains, as well as for individuals with low eyesight. They have cutting-edge equipment and methods for analysis, screening, refraction, centration, and ordering, in addition to providing customer consultations. In addition, digital platforms are provided for ordering, process management, lens optimisation, eye exams, vision tests, and platform control in addition to customer consultations.

According to ZEISS, multiple benefits in their lenses enable them to be known as premium lenses; these characteristics consist of:

- Unconditional Precision: ZEISS guarantees great durability and a short adaptation time, whether you need reading or distant vision lenses.
- Customized for Optimal Vision: Each patient's unique visual preferences and lifestyle can be matched with ZEISS single-vision lenses. They are available in various performance levels to accommodate larger prescriptions or address additional visual problems like

astigmatism or related heterophoria. This guarantees great visual clarity and reduces discomfort caused by peripheral distortions and fogging.

- Remarkably Thin and Lightweight: Even with strong prescriptions, ZEISS single-vision lenses are remarkably thin and lightweight. Lighter is usually preferable in the world of eyeglasses. Even for people with high prescription demands, ZEISS can make single-vision lenses with a minimum thickness and weight because of the premium materials and quality standards they use.
- All ZEISS clear lenses now provide the highest level of UV protection. These lenses have special qualities that efficiently block damaging sun rays, providing ongoing eye protection. By using ZEISS, you can turn any pair of eyeglasses into fashionable sunglasses of your choice that offer superb vision quality, increased contrast, decreased glare, and an anti-reflective coating.
- Aspheric Lenses for a Natural Look: ZEISS produces single vision lenses with a flatter appearance that are best suited for people with strong prescriptions or special visual impairments. These lenses preserve a natural appearance by eliminating or reducing the visual curvature that might provide the conventional magnified or "enlarged" eyes effect.
- Better Night Vision: ZEISS uses cutting-edge computer technology to customize single vision lenses after taking exact measurements of your eyes. This extensive information enables the development of lenses that are specifically designed to increase colour perception, contrast, and night vision even in low light, surpassing the capabilities of routine optometric examinations.
- Improved Comfort in Artificial Light: ZEISS lenses are made to protect your eyes from the aggravating effects of artificial light, lessening eye strain and visual stress. ZEISS adds

a unique blue radiation filter into its lenses to create a more comfortable visual experience in the modern environment, where modern light sources release more blue radiation.

- Lastly, Exceptional Durability: ZEISS lenses are made to be more resistant to scuffs and grime than ever before. Thanks to cutting-edge anti-reflective coatings, the glasses' lenses are highly resistant to smudges and damage, maintaining long-lasting clarity and comfort.

Their best sellers in Portugal are ZEISS UVProtect and ZEISS SmartLife portfolio.

Thus, it is crucial to discuss ZEISS Vision Care's business plan in detail and clarify the unique qualities and operations that set it apart from other companies in the lenses industry. This will offer a more profound comprehension of the business's activities and market positioning.

2.2.2. Business Model

ZEISS Vision Care operates on a B2B2C business model, a structure where products or services are sold to intermediary businesses, making these products available to end consumers. In this model, companies like ZEISS have two distinct sets of customers to consider: their partners, primarily consisting of the optometrists and eye care professionals they collaborate with to reach consumers, and the end users, the consumers themselves.

This duality presents a unique challenge for marketers, as effectively communicating with partners demands a different approach than reaching out to end consumers. Marketing and sales strategies tailored for businesses differ from those directed towards individual consumers, much like the distinctions observed in B2B and B2C models. Currently, ZEISS Vision Care maintains strong relationships with its partners, particularly the optometrists who are crucial in delivering ZEISS's optical solutions to the end users.

Moving on to the following topic, we will investigate the distinctive value proposition of ZEISS Vision Care and clarify the elements that set the company apart in the lens market.

2.2.3. Value Proposition

A value proposition is the unique promise a brand makes to its customers, a distinct blend of qualities and benefits that sets it apart in a crowded marketplace (Adrian Payne, Pennie Frow, and Andreas Eggert. 2017). For ZEISS Vision Care, this promise revolves around four pillars: Quality, Innovation, Brand Heritage, and Sustainability.

Quality: ZEISS Vision Care lenses epitomize precision craftsmanship, ensuring wearers experience superior vision clarity. The commitment to quality is evident in the meticulous testing conducted at the international network of ZEISS Vision Group Test Centres. These tests prove the quality of ZEISS lenses and demonstrate their direct impact on the wearer`s daily lives. The manufacturing process is underpinned by continuous improvement, guaranteeing eyewear of unparalleled quality marked by clarity, comfort, and longevity.

Innovation: As a strong player in lens innovation, ZEISS Vision Care pushes the boundaries of technology to redefine optical solutions. ZEISS lenses incorporate cutting-edge features like ZEISS UVProtect for comprehensive UV shielding and specialized solutions like ZEISS DriveSafe for enhanced visual performance. The company's commitment to innovation ensures wearers experience a correction and an optical journey marked by advancements that anticipate and meet evolving visual needs.

Brand Heritage: With over 175 years of optical expertise, ZEISS Vision Care stands as a trusted name in the eyewear industry. The brand heritage signifies a tradition of reliability and precision. Choosing ZEISS lenses means choosing a brand with a longstanding commitment to

excellence. Each pair of ZEISS lenses carries the weight of a legacy built on optical innovation, assuring wearers that they are choosing lenses crafted with decades of unparalleled optical expertise.

Sustainability: ZEISS Vision Care extends its responsibility beyond vision correction, actively contributing to a sustainable future. The company aligns its lens-crafting processes with the broader Sustainable Development Goals (SDGs) introduced in 2015 by the UN and set under the 2030 Agenda for Sustainable Development. ZEISS's sustainability strategy includes a focus on social value, a circular economy, and climate action. The goal to achieve carbon neutrality by 2025 demonstrates their commitment to Climate Action (SDG 13), while their initiatives in innovation and responsible consumption align with SDGs 9 and 12. Initiatives like the Aloka Vision Programme reflect ZEISS's dedication to good health and well-being (SDG 3), ensuring that access to superior vision is a privilege and a global standard. The company also emphasises quality education (SDG 4) and fostering economic growth (SDG 8) through its operations. ZEISS lenses, crafted with an environmentally conscious approach, underscore the company's commitment to responsible lens manufacturing and a sustainable, equitable world.

After reviewing the value proposition of ZEISS Vision Care, it is crucial to move on to discuss ZEISS branding and how it affects customer engagement in the next section, which will look more strategically at the identity and perception of the brand.

2.3 Branding

2.3.1. Brand Architecture

ZEISS is organized with a corporate umbrella branding strategy called a branded house strategy. This allows them to keep their brand's identity strong while demonstrating its synergy. The

master brand strengthens credibility through association, increasing visibility, and communication efficiencies.

The brand's core values are reflected in the four segments that the ZEISS Group holds, working together to build trust in the leading brand. Moreover, with this strategy, they can monitor all its endeavours, meeting the consumer's expectations regarding the ZEISS brand. Serving various client segments while keeping a strong commitment to service excellence and trust is the major goal of the ZEISS Group when clients purchase the brand. When new products are introduced, a brand's core principles help consumers perceive a shared identity and feel more familiar with the product. This familiarity is essential for building a favourable brand environment and increasing trust and credibility. Thus, it strengthens the fidelity of customers who genuinely identify with the brand.

2.3.2. Brand Equity

According to (Aaker, 1991), brand equity can be described as "a set of brand assets and liabilities linked to a brand, its name, and symbol, that add to or subtract from the value provided by a product or service to a firm and/or to that firm's customers."

Applying Aaker's brand equity model to the ZEISS brand, the following five brand equity components are suggested:

Brand Assets: ZEISS's brand equity is boosted by its valuable assets, including a history of innovation in optics, a strong global presence, and a legacy of industry leadership. These assets are significant contributors to the brand's equity.

Brand Awareness: ZEISS enjoys recognition for its expertise in optics and other industries. In the vision care market, this recognition translates into strong brand awareness among both

consumers and eye care professionals. The brand is known for its advanced eyewear solutions, contributing significantly to its visibility and recognition in the industry.

Brand Associations: The brand is closely associated with precision and quality; these attributes are critical in the vision care sector. ZEISS's reputation for technological innovation further enhances these associations, as does its heritage and expertise in optics. These associations collectively contribute to ZEISS's strong brand equity, supporting its trust and credibility in the market.

Brand Loyalty: ZEISS enjoys a loyal customer base, with many customers consistently choosing ZEISS products for their optical needs. This loyalty is also evident among eye care professionals, who frequently recommend ZEISS products, further enhancing its brand equity.

Perceived Quality: ZEISS's products are widely perceived as high quality, benefiting from the brand's reputation for precision engineering and innovation. This perception is a critical component of its brand equity, encouraging customer trust and loyalty. The high levels of customer satisfaction and positive feedback contribute to this perception of quality.

2.3.3. Brand Elements

Brand elements, encompassing aspects like the brand name, logo, design, and other visual identifiers, are crucial in establishing a brand's identity and recognition in the market. For ZEISS Vision Care, these elements are not just symbols; they are strategic tools that convey the company's legacy, quality, and innovation in vision care. The focus of this section will be on how these elements contribute to ZEISS Vision Care in making the brand distinct and memorable to consumers globally.

Brand Name: The "ZEISS" brand name communicates simplicity, strength, and a focus on the well-established reputation of the ZEISS brand in the field of vision care. The name itself is

iconic and represents a commitment to precision and quality. The simplicity of "ZEISS" can convey a sense of confidence, making it easily recognisable and memorable for customers seeking trusted vision care solutions.

Logo: The ZEISS logo is a key visual element representing the brand. It is consistently used across all communications, ensuring brand recognition. The ZEISS logo features a sleek and modern design. It incorporates a distinctive circular lens motif, symbolizing precision and clarity. The circular lenses are surrounded by clean lines and subtle geometric elements, conveying a sense of innovation and sophistication. The primary colour palette includes a deep blue shade to represent trust and professionalism, while the white elements within the logo emphasise clarity and purity.

Slogan: The "Seeing Beyond" slogan captures the essence of ZEISS as a premium brand in the vision care industry. "Seeing Beyond" signifies not only the brand's commitment to a clear vision but also the promise of an elevated and premium experience. ZEISS, renowned for precision and innovation, invites customers to transcend ordinary vision care, offering a premium quality that goes beyond expectations.

Symbol/Characteristics: Every ZEISS lens feature a discreet yet distinctive "Z" engraving, a subtle mark of exceptional quality. This small but powerful symbol is a testament to the authenticity and superior craftsmanship of ZEISS precision lenses, ensuring optimal comfort for the wearer. Incorporating the "Z" in every lens underscores ZEISS' commitment to clarity, precision, and technical excellence.

Packaging: ZEISS created premium environmentally responsible packaging and "on-brand" to deliver the high-quality service that customers have come to expect from the company.

Consumers who purchase their other products (such as binoculars and camera lenses) also benefit from superior packaging. The lens wraps, and the bigger frames' microfiber bag are 100% recyclable and reusable for most frames. The boxes are recyclable and have almost the maximum percentage of recycled material (91%) in them. Every ink is entirely biobased. Lastly, the authenticity certificate for ZEISS goods is recyclable and printed on 100% recycled paper. Customers can identify which pair belongs to them by looking at the outside, which has the patient's name, and the inside, which has the prescription information. Thus, the eye care professionals can tell each box apart while maintaining a certain degree of patient privacy.

ZEISS's Tone of Voice: ZEISS's tone is authoritative and expert due to its long-standing history in optics and precision technology, often communicating as a field expert. It is also innovative and forward-thinking, continually emphasising its innovations and dedication to pushing boundaries in optics. Additionally, the tone is premium and refined, reflecting its high-end brand positioning with polished and sophisticated communication that emphasises its premium offerings and advanced technology.

2.3.4. Brand Identity

ZEISS Vision Care's brand identity unveils a combination of precision, innovation, and an unwavering commitment to transforming the eyecare landscape. The brand identity can be characterized in six facets according to Kapferer's Brand Identity Prism (1996):

Physical: ZEISS logo comprises the word ZEISS in all sizes and fonts, alone or in combination with other graphics or elements. According to the company's official website "The reunification of Carl ZEISS 20 years ago is also reflected in today's company logo." ZEISS Vision Care's physical identity is synonymous with precision and innovation. The tangible products, such as lenses and eyewear, embody cutting-edge technology and meticulous craftsmanship. The sleek

designs and advanced materials contribute to a physical presence that is not just functional but also stylish.

Relationship: The reflection of ZEISS Vision Care in its customers' eyes is one of trust and clarity. Customers see the brand as a representation of quality, providing solutions that enhance their vision and, consequently, their overall well-being. ZEISS wants its customers to see the world with newfound clarity and perceive life with a sharper focus. It is available on ZEISS official website a customer service that allows the customer to connect with an expert to have their questions and concerns addressed easily. Besides this, ZEISS also offers a loyalty program: ZEISS OPTIME, which allows the customers to “benefit from priority treatment, to enjoy carefree working, and avoid impairments with sustainable conviction.”

Customer Reflection: The brand aims to resonate with individuals who seek precision, quality, and a personalised approach to vision care. ZEISS envisions its customers seeing the brand as an example of reliability, clarity, and a commitment to enhancing their overall well-being through advanced eyecare solutions. The target audience includes those who value not just functional vision correction but also stylish and technologically advanced eyewear.

Personality: As a German brand, the personality of ZEISS Vision Care shows a blend of precision and empathy. It is a brand that understands the details of its vision and is committed to delivering solutions with supreme accuracy. Yet, it also carries a warm and approachable behaviour, acknowledging the personal nature of the vision care journey.

Culture: ZEISS Vision Care's culture is deeply rooted in innovation, expertise, and a commitment to improving lives through better vision. The company encourages a culture of continuous learning and exploration, driving its teams to push boundaries and set new standards

in the eyecare industry. ZEISS has also an open corporate culture that encourages transparency and openness and brings colleagues together. As stated by Neil Morrison, Head of Communications for Benelux: “We would like to encourage a dialogue between the employees and promote trust.”

Self-image: The brand’s self-image is associated with experts in various fields across the world, among them 22 Nobel Prize winners. The self-image ZEISS Vision Care wants to inspire in its customers is one of empowerment. By choosing ZEISS, individuals embrace a proactive approach to their eye health. It is not just about correcting vision; it is about embracing a lifestyle that prioritises clarity, precision, and the beauty of seeing the world in all its vivid detail.

To critically evaluate the brand in terms of its internal and external environment, a SWOT analysis is presented next.

2.4. SWOT Analysis

SWOT Analysis framework is a tool for strategic management that aids in the evaluation of an organization's opportunities, threats, and internal and external strengths and weaknesses. When applied to ZEISS Vision Care Company, this approach can offer insightful information about the company's current state and prospects for growth.

| Strengths | Weaknesses |
|---|--|
| <ul style="list-style-type: none"> • Brand Reputation: ZEISS has built a reputation for manufacturing optical products of exceptional quality, which has established a strong sense of trust among consumers. • Technological Innovation: ZEISS is renowned for its state-of-the-art lens technology giving it an edge in the lenses market. • Product Range: ZEISS offers a selection of lenses to cater to vision correction needs. They provide lenses for astigmatism and multifocal lenses for presbyopia, ensuring they meet requirements. • Sustainability: ZEISS demonstrates a commitment to sustainability by adopting eco-friendly practices, such as using recyclable materials and implementing sustainable manufacturing processes. | <ul style="list-style-type: none"> • Price: ZEISS lenses are often positioned as premium products, which may limit their accessibility to price consumers. • Limited physical presence: ZEISS is only in strategic points of sale to preserve being a premium brand. • Social media: ZEISS only has social media pages for their main countries, and Portugal is not one for them, so they don't post much or engage with their audience. |
| Opportunities | Threats |
| <ul style="list-style-type: none"> • Growing Eyewear Market: Portugal's eyewear market has been steadily growing, primarily driven by an aging population, according to a study from BMC: Public Health (2023). As reported, Portugal has one of the oldest populations in Europe, with the percentage of people aged 65 and above relative to the total population on the rise (The World Bank, 2022). According to a study made by INE Portugal (2020), the aging ratio is expected to almost double by 20. • Digital Marketing: ZEISS can capitalize on the growing trend of digital consumption among younger demographics by implementing effective digital marketing strategies. Gen Z, for example, spends 6 to 9 hours per day consuming online media, according to Forbes (2018). By targeting this tech-savvy group, ZEISS can expand its customer base and align with the preferences of the digital age. • Rising Health Consciousness: Leveraging the increasing consciousness of eye health and the significance of high-quality vision care, ZEISS could position itself as a brand that prioritizes customer needs. Educating the public on the value of routine eye exams and the contribution of high-quality lenses to eye health aligns with the growing trend of health consciousness. | <ul style="list-style-type: none"> • Competition: ZEISS faces a competitive landscape with Essilor as its primary competitor in the premium spectacle lenses segment. While ZEISS holds a significant market share of 27%, Essilor currently leads with 32%. This competitive rivalry in the premium sector could pose challenges for ZEISS in terms of market dominance and growth. • Economic Factors: Economic downturns or recessions could potentially lead to reduced consumer spending on essential items like lenses. (e.g. Russia-Ukraine war) • Regulations: Changes in regulations or compliance requirements have the potential to impact the sale and distribution of lenses. |

Figure 1- SWOT Analysis

After analysing the company, it is necessary to carry out an analysis of its external environment.

The company's performance and results are significantly shaped by the market in which it

competes. To fully comprehend the company's place and prospects, a thorough investigation of the industry dynamics and general market overview is necessary.

3. Market Dynamics

3.1. Market Overview

Over the next five years, the worldwide eyeglasses industry is anticipated to increase at a strong annual rate, according to Statista (2023). Technological advancements, evolving market structures, and megatrends in consumer behaviour are the main forces behind this expansion. As people age and require increasingly complex vision correction, one of the most important global demographic issues affecting eye care is aging. Moreover, growing screen usage, particularly in children, may have greater detrimental impacts than previously believed, reinforcing the ongoing need for preventive eye care.

In 2023, the market for spectacle lenses, including glass and plastic lenses, corrective and non-corrective lenses, and progressive lenses, will generate 54.60 billion euros in revenue. By 2028, the volume of spectacle lenses is predicted to reach 0.8 billion pieces worldwide. The market for spectacle lenses is anticipated to rise by 316.8% in volume by 2024. In 2023, it is anticipated that the average volume per person in the spectacle lenses market will be 0.1 pieces.

3.1.1. Market trends

In the evolving landscape of the eyewear industry, comprehending and being aligned with global consumer trends is essential to unlock growth potential. Two prominent trends that demand attention in 2022, as outlined in Euromonitor's (2022) article on *Global Consumer Trends for 2022 in Eyewear*, are the rising influence of Climate Changers, the increasing tech adoption among Digital Seniors, and the revolutionary Metaverse Movement.

It is worth noting that although the article specifically addresses trends in 2022, for the purpose of this analysis, we will assume that these trends persist and remain relevant in the subsequent years (from 2024 onwards).

Firstly, the emphasis on sustainability and climate change is a key opportunity for eyewear businesses to connect with consumers in the post-pandemic era. A significant 66% of global respondents express concern about climate change, with Millennials emerging as a crucial demographic, constituting over a third of global sunglass wearers.

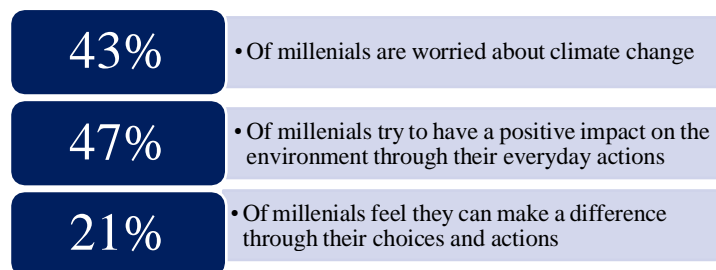


Figure 2- Market Trends

Source: Euromonitor International's Voice of the Consumer: Lifestyles survey 2022, fielded January to February

To remain competitive, eyewear companies should invest in eco-friendly products and services. As mentioned in the Euromonitor (2022) article, UK-based Pangaia's introduction of sunglasses utilizing CO₂ polycarbonate lenses exemplifies a commitment to reducing carbon footprints.

Moreover, the arrival of the Metaverse Movement is reshaping consumer behaviours, particularly among Gen Z and Millennials. With these demographics embracing immersive digital worlds for socialization and experiences, eyewear companies must consider integrating into the metaverse. Euromonitor emphasises that forward-thinking brands like Gucci and Tiger Beer have already ventured into this space, creating virtual experiences for consumers. As smart glasses gain traction as gateways to the metaverse, eyewear brands have the opportunity to explore this recent but promising market, even though with technical and legal challenges.

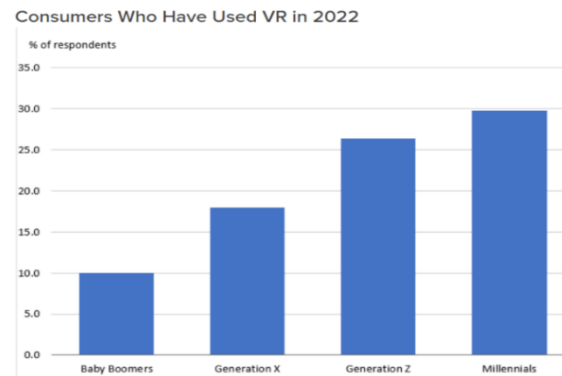


Figure 3- Consumers who have used VR
 Source: Euromonitor International's Voice of the Consumer: Digital survey 2022, fielded March to April

In conclusion, eyewear companies navigating the market trends must strategically position themselves. By embracing these trends, eyewear businesses can stay relevant and maintain sustainable growth in an industry defined by innovation and consumer connection.

3.1.2. The Context: Portuguese market of optical stores

In Portugal, the optical stores are 70% independent opticians and 30% chains; examples of these chains are Wells, Multiópticas, Mais Óptica, among others. The brand focuses on independent opticians because they preserve the ZEISS brand as premium. Typically, chains are associated with low prices and tend to harm the brand through discounts and direct-to-consumer campaigns.

Furthermore, the spectacle lenses market is also influenced by prescription. In Portugal, there are two main types of prescribers: optometrists (60%) and ophthalmologists (40%). Usually, what the optometrist prescribes is associated with the optics business. Regarding ophthalmologists, only 50% prescribe brands, of which 80% are prescriptions from Essilor (Essilor holds the prescription market in Portugal), ZEISS is currently working on trying to

increase the volume of ophthalmology prescriptions. Therefore, Essilor is their main competitor in Portugal.

3.2. Competition Analysis

To learn where the brands stand in the market, a competition analysis needs to be performed. It is crucial to understand ZEISS's communication strategies and approaches and the ones from its main competitor - Essilor. Both brands have firmly established themselves in the market but employ differing methodologies in their communication and outreach efforts.

ZEISS Lenses: Communication Strategy and Approach

Premium Positioning: ZEISS typically positions itself as a luxury or premium brand, appealing to consumers who equate higher price points with superior quality. This positioning can be seen in their advertising choices, collaborations, and targeted customer segments.

Heritage and Precision: ZEISS leverages its storied heritage in optics to connect with consumers who value tradition and technological excellence. The brand's long history of precision and innovation is a key part of its narrative, resonating with Portuguese consumers who appreciate quality and craftsmanship.

Personalisation: ZEISS's promotional endeavours focus on the individualised nature of their products. Their lenses are often highlighted as tailored solutions, catering specifically to the needs, lifestyles, and visual habits of each user.

Holistic Vision Care: Beyond just lenses, ZEISS emphasises overall eye health. The brand communicates the benefits of its products, from blue light protection to UV protection, painting a picture of comprehensive eye care.

Consumer-Centric Communication: Beginning five years ago, ZEISS Portugal significantly shifted its communication strategy by appointing Catarina Furtado as their brand ambassador.

This marked a move from a product-focused approach to a consumer-centric one, emphasising direct consumer engagement. Since then, the messaging has pivoted from detailing product characteristics to highlighting the benefits associated with the consumers' needs. This strategy reflects a deeper understanding of the consumer market and an effort to align product communication more closely with consumer lifestyles and preferences.

Essilor Lenses: *Communication Strategy and Approach*

Universal Eye Care: The theme of universal eye care is Central to Essilor's communication strategy. Their "Improving lives by improving sight" mission is often echoed across campaigns, indicating their aim to cater to a broad spectrum of consumers.

Digital Engagement and Younger Demographics: Essilor has a pronounced digital presence, especially on platforms popular with younger demographics like Instagram and Facebook. Their content is crafted to resonate with the values, aesthetics, and interests of Gen Z and millennials, showcasing an understanding of shifting consumer behaviour.

Educational Approach: Essilor often takes an educational stance in its communications. The brand raises awareness about regular eye check-ups, the importance of correct vision, and the dangers of UV rays.

Collaborations and Partnerships: To extend its reach and solidify its presence, Essilor has engaged in collaborations, not just in terms of mergers and acquisitions (like with Luxottica) but also in campaigns, influencers, and other brand partnerships.

Main points of differentiation

| Dimension: | ZEISS | Essilor |
|---------------------------|--|---|
| Target Audience | Primarily premium segment | Emphasises universal eye care and accessibility |
| Digital Engagement | Digital presence, but less dynamic compared to Essilor | Pronounced digital strategy, especially targeting younger |

| | | |
|---|---|--|
| | | demographics (Gen Z and Millennials) |
| Educational vs Heritage Emphasis | Leans heavily on heritage and technological excellence | Takes an educational stance, raising awareness about eye care and regular check-ups |
| Communication Strategy | Premium positioning, personalisation, holistic vision care, consumer-centric approach | Universal eye care mission, digital engagement, educational approach, collaborations, and partnerships |

Figure 4- Competition Analysis: main points of differentiation

To complement this competitive analysis, to better address ZEISS Vision Care's branding and communication challenge effectively, a comprehensive analysis of another company in the eyecare industry was taken (see Appendix 3). The objective is to benchmark the strategies and solutions, providing ZEISS with valuable references for improving their practices. The company chosen, Felix Grey One, offers insights into best practices from a similar context.

To get to know more about all the external factors that have an impact in the company, a PESTEL Analysis is addressed in the next section.

3.3. PESTEL Analysis

PESTEL analysis is a strategic framework used to evaluate the external environmental factors affecting a business. For ZEISS Vision Care in Portugal, this analysis would consider the Political, Economic, Social, Technological, Environmental, and Legal factors that could influence its market operations and strategic decisions. This comprehensive overview aids in understanding the broader landscape in which ZEISS operates, ensuring the company can navigate the Portuguese market's complexities and harness opportunities for growth and innovation.

Political: In Portugal, ZEISS Vision Care operates within a politically stable environment with a government that generally supports business and innovation, particularly in the medical

technology and optics sectors. As a member of the EU, Portugal has a regulatory landscape strongly influenced by European directives, including those that govern the medical devices sector, with which ZEISS must comply (EU regulations, 2017). This includes adherence to the Medical Devices Regulation (MDR) for product safety and performance. Intellectual property rights are robust, ensuring protection for ZEISS's technological advancements. The Portuguese healthcare system's policies on vision care and reimbursement schemes can directly affect ZEISS's market potential. Moreover, the emphasis on digital transformation and data protection under GDPR impacts how ZEISS handles customer data and privacy (Portugal-Data Protection Overview, 2023). Thus, the company's strategic decisions must account for these political and regulatory considerations to optimise its market position in Portugal.

Economic: In Portugal, the economic landscape significantly impacts ZEISS Vision Care's operations in the eyeglass lenses segment, where factors such as consumer spending power, economic growth, and healthcare expenditure play pivotal roles. Given the current economic context, Portugal's measured pace of growth and diligent fiscal management are expected to shape disposable income levels, potentially tempering the demand for ZEISS's premium lenses in the near term. (Statistics Portugal, 2023). Consumer behaviour, influenced by macroeconomic conditions, dictates spending patterns on essentials and non-essentials, although eyeglasses often fall into the former category, providing a degree of market stability even in economic downturns. Employment rates correlate with health benefits coverage, including vision care, affecting the number of consumers who might choose ZEISS lenses. Furthermore, interest rates influence not only consumer spending but also ZEISS's own investment and financing decisions. Investments in innovation and marketing must be judicious, with a keen eye on the shifting patterns of consumer expenditure. The vibrancy of Portugal's tourism sector can also sporadically boost sales, as tourists may purchase ZEISS

eyewear (Taylor, 2023). Lastly, the cost of living may temper or stimulate consumer expenditure on health-related goods, including eyewear, with potential implications for the premium segment that ZEISS targets (Cost of living in Portugal, 2023). Navigating this complex economic environment requires strategic acumen to ensure that ZEISS Vision Care capitalises on growth opportunities while mitigating risks associated with economic fluctuations.

Social: In Portugal, social factors significantly influence ZEISS Vision Care's market, where an aging demographic profile creates a growing need for vision correction, potentially increasing demand for ZEISS's eyewear lenses (Lopes, 2023). The heightened health awareness among consumers, exacerbated by digital lifestyles leading to concerns over eye health, presents an opportunity for ZEISS to offer specialised products. Moreover, the Portuguese consumer base also shows an inclination for premium, quality products, and this brand-consciousness benefits ZEISS, a brand synonymous with quality in optics. ZEISS's engagement in social responsibility and sustainable practices also aligns with the ethical expectations of Portuguese consumers, further strengthening its brand reputation and fostering customer loyalty (ZEISS, n.d.). These social dynamics necessitate that ZEISS maintains a keen understanding of consumer trends and societal values to effectively meet the evolving needs and preferences of the Portuguese market.

Technological: Technological factors play a critical role in shaping the competitive landscape for ZEISS Vision Care in Portugal's eyeglass lenses market. The rapid pace of technological innovation directly influences product development, manufacturing processes, and customer service models. Precision optics and materials science advancements enable lenses with superior clarity, durability, and lightness, meeting the demand for high-quality vision solutions. These offerings are characterised by features like rapid colour transition, high optical clarity,

and digital device compatibility, addressing the nuanced needs of modern consumers (Bryan Ng, 2023).

The rise of telemedicine and mobile health apps represents a transformative shift in how consumers approach vision care, with the potential for ZEISS to expand into digital health services that complement their eyeglass products (Saigí-Rubio, 2022). Additionally, sustainable technology is becoming increasingly important, as consumers and regulators alike push for environmentally friendly products, which may include biodegradable materials or energy-efficient production methods in the lenses manufacturing process. ZEISS's technological prowess is also evident in their research and development efforts, ensuring that they remain at the forefront of optical science. By integrating cutting-edge technological trends and investing in the development of new solutions, ZEISS not only adapts to the changing landscape of vision care but also helps to drive it forward.

Environmental: ZEISS Vision Care's environmental strategy is a testament to its commitment to sustainability, carefully arranged under the "Green, Safe & Responsible" program (ZEISS, 2020). This commitment aligns with key SDGs, guiding their initiatives towards substantial ecological contributions.

According to the 2020-21 Sustainability Report (ZEISS, 2021), in adherence to SDG 13 (Climate Action), ZEISS has realised a 70% reduction in CO2 emissions compared to the 2018-19 fiscal year. This significant achievement demonstrates ZEISS's dedicated efforts toward combating climate change. It also aligns with their bold target of reaching carbon neutrality by 2025, a goal that reflects their proactive approach to environmental stewardship. The CO2 Emissions Reduction KPI carefully tracks this progress, underscoring ZEISS's resolve to reduce its carbon footprint and contribute to global climate action initiatives.

In adherence to SDG 7 (Affordable and Clean Energy), the 14% reduction in energy use relative to value-added signals ZEISS's advancement towards optimising energy efficiency and harnessing renewable energy. The Energy Efficiency KPI not only tracks but also highlights ZEISS's commitment to sustainable energy consumption.

Addressing SDG 12 (Responsible Consumption and Production), ZEISS has implemented effective waste management strategies, resulting in a 29% waste reduction. This supports the responsible production patterns advocated by SDG 12, with the Waste Reduction KPI providing insight into the efficacy of these practices.

ZEISS's 25% reduction in water usage resonates with SDG 6 (Clean Water and Sanitation), emphasising the sustainable management of water resources and conservation efforts. The Water Usage Efficiency KPI quantifies this prudent water use, ensuring that ZEISS's operational practices align with ecological preservation.

By incorporating these KPIs as integral components of its environmental strategy, ZEISS Vision Care holds itself accountable to these sustainability metrics and reinforces its role as an environmentally responsible leader in the vision care sector. This strategic integration of SDG targets into their operational ethos drives ZEISS to the forefront of corporate environmental responsibility, showcasing a commitment to ambitious and authentic sustainability.

Legal: ZEISS Vision Care's legal context in Portugal is governed by a complex array of national and EU laws that dictate every aspect of their operation (Medical Devices European Medicines Agency, 2023). The legal notice & general terms provided by ZEISS underscore their adherence to these regulations, which encompass data protection, intellectual property, consumer rights, and specific optical industry standards. These laws ensure that ZEISS Vision Care's innovative products meet the highest standards for safety and efficacy, which is not only a legal mandate but also a cornerstone of their commitment to quality. Navigating this intricate legal landscape

is essential for ZEISS Vision Care to maintain its reputation, minimise risk, and ensure the trust of its customers and partners.

4. Market Research and Methodology

To gather accurate insights, it is crucial to have data from quantitative and qualitative research. As a result, we conducted an online survey and one-on-one interviews.

By integrating the findings from the data gathered from the survey and interviews, we were able to provide an all-encompassing overview of the brand environment in the Portuguese spectacle lenses market.

4.1. Quantitative data: Survey

The survey aimed to examine consumer opinions to ascertain their complex viewpoints regarding ZEISS and other brands of lenses, namely understanding brand perceptions and emotional ties to the company. It also examined how advertising influences customer opinions and explored the effectiveness of different campaigns. With the collected responses we learned more about the reasons behind the consumers' choices, adjusting our marketing campaign accordingly to what the market is asking for.

4.1.1 Method and Sample

The survey was performed on a web-based platform, Qualtrics, whereas it was distributed through online networks to reach the maximum number of participants possible (see Appendix 4 for the full questionnaire). The sampling method used was convenience sampling, and the survey was available to answer for a week.

A sample of 256 responses was collected, out of which 197 were valid after passing the filtering questions; data sets that didn't meet the criteria were excluded from the study. A screening filter

based on the respondent's residence over the last five years was applied to ensure they lived in Portugal and, therefore, purchased according to their needs in the Portuguese context.

According to the survey, the demographic makeup of the Portuguese spectacle lenses market is primarily composed of women (65.48%). The age distribution reveals a significant concentration in the younger demographic, with 47.21% of respondents in the 16–25 age group, 25.89% in the 41–55 age group, and 18.27% in the 26–40 age group. This points to a broad age range of consumers, ranging from young to middle-aged. With most respondents holding a bachelor's degree (49.24%) or a master's degree (38.58%), the education level is noticeably high.

When it comes to occupation, most are employed (53.30%) or self-employed (10.15%), which indicates a professional customer base, combined with a significant proportion of college students (29.95%). Most households consist of three or four people, suggesting possible patterns in family decision-making when it comes to purchases.

The market indicates a trend towards higher earnings regarding income levels. More than €4000 (25.38%) is the income range that is most frequently reported. This suggests that the target market is one with significant purchasing power, which may make them more open to premium and more expensive lenses options.

4.1.2 Main Findings

Prescription glasses and buyer

The survey reveals a correlation between age and the use of prescription eyeglasses, with usage rates climbing across age groups. Young adults (16-25 years) report a 49.46% usage rate, increasing to 63.89% for those aged 26-40 and 72.55% for the 41-55 age bracket. The peak is observed in participants aged 56-65, where 92.31% wear glasses. However, for those 66 or

older, the sample size is too small to draw definitive conclusions, even though 50% reported wearing prescription eyeglasses.

These statistics reflect a general trend toward a greater need for vision correction in older populations. Remarkably, a sizable 87.83% of these people who wear glasses claimed to be the main decision-makers when it came to their purchases. This high level of autonomy in purchasing decisions emphasises the importance of direct consumer engagement and tailored marketing strategies in the eyeglasses industry, particularly for companies like ZEISS. These observations emphasise the possibility of focusing on and influencing the decisions of final consumers in the optical market.

Type of Lenses

This indicates a strong preference for single-vision lenses, which 76% of respondents chose, underscoring a commonality in lenses selection regardless of gender. This preference spans across various age demographics, but the older age groups, particularly those aged 56-65, show a higher propensity for choosing progressive lenses. Such a pattern implies a correlation between advancing age and the likelihood of opting for progressive lenses, which can be attributed to the natural evolution of visual needs with age.

The data suggest that while single-vision lenses are the predominant choice for the general population, there is a distinct shift towards progressive lenses as part of the aging process, likely due to the onset of presbyopia and the need for multifocal vision correction.

Optometrist influence

The survey demonstrates that optometrists are pivotal in guiding patients' choices regarding eyeglass lenses. The data reveals that a notable portion of respondents, 80% (sum of 'Quite',

'Highly', and 'Extremely'), regard the recommendation of their optometrist as a major factor in their decision-making process.

This consistent pattern across diverse demographic segments highlights the deep-seated trust and value placed on optometrists' specialized knowledge and advice. It underscores the optometrist's critical influence in the decision-making process for eyewear, reflecting their authority as healthcare professionals and the reliance patients place on their expertise for vision care.

Willingness to Pay

When assessing participants' willingness to pay to buy lenses, the study showed an average of 261.63 euros. Remarkably, respondents' average willingness to pay jumped to 399.90 euros when they were shown a scenario that included both lenses and frames, (the average willingness to pay for frames was 138.27 euros).

This difference indicates a significant tendency for participants to place a higher value on the lenses alone.

Brand Familiarity

When participants were asked to rate their acquaintance with well-known lenses brands, 32% of them—a significant majority of the sample—said they had no familiarity (rating "1-not at all") with ZEISS, and 37% said about Essilor. Comparatively, a significant 11% of respondents gave their acquaintance with ZEISS and Essilor a rating of "7-extremely familiar."

This contradiction highlights the general lack of brand awareness among a considerable proportion of the sampled population while also highlighting a noticeable recognition cluster

around ZEISS and Essilor among those participants who are familiar with lenses brands in the Portuguese market.

Brand Choice and Influence

When the effect of brand considerations on participants' purchase decisions was examined, most of the participants claimed that brand had no discernible effect on their decisions. However, ZEISS was the number one mentioned for people who answered that a brand influenced them.

This indicates that brands do not influence a significant portion of the sample, while those who show brand influence are more likely to choose ZEISS. This observation highlights the complex dynamics of brand influence concerning decisions made about purchasing lenses.

Type of Marketing Influencing Decision-Making

Optometrist advice and word of mouth each played a significant role in influencing decisions on eyeglass lenses, accounting for the highest proportion of responses. This prominence of personal and professional recommendations suggests a strong trust in familiar and authoritative sources over other marketing methods. Traditional media channels like television notably impacted decision-making within certain demographics, notably within the 41-55 age group and among individuals with lower incomes, indicating these channels still hold relevance. In contrast, digital marketing avenues such as social media and influencer endorsements were less influential across all demographic groups, which might reflect a scepticism towards these platforms or a lesser relevance in the context of health-related products.

Recall of Eyewear Advertising

When enquired about the recall of eyewear advertising, 65% of respondents affirmed remembering such promotions, while the rest, 35% indicated otherwise. Among those who

affirmed exposure to eyewear advertising, the most resonant brands were ZEISS and Essilor. Regarding optical stores, the most recalled from advertising were MultiOpticas and Alberto Oculista.

This observation suggests that these brands have successfully created a lasting impression in the minds of consumers in Portugal.

Wearing ZEISS Lenses

When asked if they wear ZEISS lenses, 15% of respondents confirmed wearing them, while 50% admitted not doing so, and the rest remained uncertain. Regarding the motivations of those who wore ZEISS lenses, the predominance chose the lenses' **superior quality** as a primary reason for their choice. Other relevant motivations included **brand reputation**, recommendations from eyecare professionals, **trust** in the brand, and the perceived technological **innovation** associated with ZEISS products.

Contrarywise, for those not wearing ZEISS lenses, some indicated that their eyecare professional recommended an alternative brand. Moreover, **price** considerations, brand preferences, and unavailability in stores were cited as prevalent reasons for opting against ZEISS. A notable observation from the 'other reason' category indicated that a segment of respondents did not prioritise a lenses brand during their eyewear purchases, reflecting a potential market segment that may be less brand conscious.

ZEISS' Country of Origin

Regarding the awareness about the country of origin of ZEISS, a significant majority, 80% of the respondents admitted being unaware. Of those who claimed they knew, only a few

respondents correctly identified Germany as the country of origin for ZEISS, revealing a level of informed consumer awareness within the surveyed population.

Choice of Alternative Brand

Regarding brand choice for lenses, a competitive preference for Essilor was noted, with 49% of participants favouring this brand over ZEISS. A fragmented market with varying levels of consumer loyalty is indicated by the remaining 51% of respondents choosing other various brands. Some respondents indicated they were influenced by professional advice or were unaffected by brand distinction, while others stated they were unaware of any brand, relied on optometrist recommendations, or expressed no preference for a particular brand. The range of answers highlight the significance of brand awareness and education since some consumers could not be making informed choices because they lack information. The statement underscores the noteworthy impact of optometrists on the lenses selection process and implies that ZEISS might potentially improve its recommendation rates by means of more robust partnerships or educational initiatives aimed at eye care professionals. Overall, this input gives ZEISS a chance to consider how they may better position themselves against competitors such as Essilor and cater to the demands of customers who choose other brands or follow the advice of their optometrist.

Feelings

Regarding consumers' feelings towards ZEISS, the research shows notable emotional connections to the brand, including sentiments of empowerment, pride, and loyalty. With a mean score of 5.21 (measured on a 7-point bi-polar scale), consumers showed a strong sense of pride, indicating that wearing ZEISS glasses contributes to positive self-esteem.

ZEISS * Feelings_1 Crosstabulation

| Count | | Feelings_1 | | | | | | Total |
|-------|-----|------------|---|---|---|---|---|-------|
| | | 2 | 3 | 4 | 5 | 6 | 7 | |
| ZEISS | Sim | 1 | 3 | 4 | 1 | 5 | 5 | 19 |
| Total | | 1 | 3 | 4 | 1 | 5 | 5 | 19 |

Figure 5- Using ZEISS vs feeling proud

By correlating data on individuals wearing ZEISS lenses with their reported level of pride, we can conclude that, despite that there is a relatively low representation of ZEISS users in the sample, those who do use ZEISS lenses express a considerable sense of pride associated with wearing them.

With an average score of 5.64, loyalty becomes even more apparent and indicates a strong emotional connection with the brand as well as a high probability of continued advocacy. Empowerment exhibits a wider range of feelings, with an average of 4.43, indicating that although ZEISS has a favourable impact on consumers' sense of empowerment, the effects are inconsistent for all users. The varied responses, particularly in empowerment, highlight an opportunity for ZEISS to explore further and potentially strengthen this emotional aspect of the consumer experience.

Overall, these metrics highlight the brand's successful cultivation of favourable emotional associations, which are essential in fostering long-term customer relationships.

Trust

Regarding the trust towards the ZEISS brand, research shows that customers have a high level of faith in the ZEISS brand. According to the results, there is a high degree of trust among respondents in ZEISS. The statement "I trust ZEISS." has an average score of 6.07 out of 7. Furthermore, the perception that "ZEISS delivers what it promises" has an average score of 6.00, indicating that consumers find the brand to be reliable. Furthermore, the average score for both the desire to repurchase ZEISS products and the willingness to recommend ZEISS to

others was 5.79, indicating a high degree of customer satisfaction and loyalty. These findings are critical to comprehending the brand's position in the market because they show that ZEISS is not only trusted but also highly regarded for keeping its promises, which fosters strong customer loyalty and advocacy. This high degree of trust is a valuable asset for ZEISS and indicates that its product strategies and marketing initiatives are building strong customer relationships and brand loyalty.

Brand affect/image

When examining customer perceptions and opinions of the ZEISS brand, it is clear that respondents primarily have favourable things to say about the brand. The statements evaluating the brand's goodness, positivity, and favourability produced high average scores of 4.89, 4.91, and 4.81 out of a possible 7, respectively, suggesting that consumers have a strong and positive perception of the brand. The brand's apparent low correlation with negative traits is seen from the lower average score of 3.05 assigned to the statement "This brand is harmful." Though moderate, the opinions of ZEISS as a trendy (4.11) and conscious (4.30) brand show that the company is reasonably acknowledged for its conformity to current environmental norms and trends. Additionally, the convenience (4.35) and purposefulness (4.55) rankings for the brand indicate that customers view ZEISS products as useful and essential to their needs. These responses highlight the range of viewpoints held by consumers and provides a complex picture of how the brand is perceived in the marketplace.

This analysis is instrumental for ZEISS, highlighting the key strengths in its brand image, such as perceived quality and purposefulness, which can be strategically amplified in marketing initiatives. In addition, it pinpoints areas where more efforts or improved communication could strengthen the brand's reputation in the market.

4.1.3 Limitations

This quantitative research has several limitations that are followed by recommendations for future studies. Bias in the sampling process happened because we verified an overrepresentation of females, which can affect the conclusions' validity. Additionally, there is a possibility of social desirability bias, in which participants may provide responses that do not reflect their beliefs or actions to conform with socially acceptable expectations.

4.2 Qualitative data: Interview

Concurrently, we conducted insightful interviews with optometrists, now to obtain a professional viewpoint of the journey their clients go on when they are at the store, understanding their behaviour, purchasing triggers, and brand awareness of the lenses market. The purpose of these semi-structured interviews was to learn more about the professional factors and perspectives that optometrists consider when assessing and recommending different brands of lenses to their patients. The open sharing of experiences and viewpoints by optometrists offered a special insight into a key part of the customer's journey to acquire and purchase the lenses.

4.2.1 Method and Sample

The interviews were conducted online and in person and were semi-structured. Regarding the ones made through online channels, the questions were sent via e-mail, and the optometrists took about three to four days to reply. In-person, one-on-one interviews were performed in the store, where the optometrists work, in an open question format, where space was given for them to share their points of view on the presented topics (see appendix 5 for full interviews). The interviews were conducted with an optometrist from a ZEISS seller store and another from a

store that does not sell ZEISS. Their consent was given, and confidentiality of their identity was ensured to protect the participants' privacy.

The interview sample consisted of five optometrists, four located in the Lisbon metropolitan area and Optiworld in Porto. The sample was split into two groups: three optometrists from ZEISS-selling stores and two from non-ZEISS-selling stores, to understand the dynamics among stores that sell ZEISS lenses and those that do not. Optivisão Linda-a-Velha and Optica Morais Soares were the non-ZEISS-selling stores, whereas MultiOpticas Oeiras, Opticália Santa Maria, and Optiworld Porto were the ZEISS-selling stores.

4.2.2 Main Findings

| Main-Category | Subcategory | Sub-Subcategory |
|-----------------------------|-------------------------------|---|
| Customer Journey | Consumer Behaviour | Decision-making drivers |
| | Purchasing process | Store journey |
| Consumer Concerns | Eye health issues | Need |
| | Features | Purchasing triggers |
| Lenses Brand Awareness | Involvement | Impact of advertising Recognition strategies |
| | Consumer Reviews | Online Ratings and Reviews Testimonials |
| Impact of Digital Platforms | Relevance | Social Media presence User experience |
| | Online Purchasing | Mobile App Convenience Website navigation |
| Vision Needs | Opportunities | Customization options |
| | Eye Health | Blue Light Protection Prescription Accuracy |
| Preferred Lenses Features | Quality | Advanced technology |
| | Style and design | Fashion Trends Frame materials |
| Investment Decisions | Consumers' willingness to pay | Value for money Premium features |
| | Warranty and Service | Extended warranty Customer service |

| | | |
|----------------------------|-------------------------|---|
| Sustainability Initiatives | Eco-Friendly materials | Recyclable package |
| | Social responsibility | Community engagement Fair trade practices |
| Campaign Suggestions | Seasonal promotions | Holiday sales |
| | Collaborative Campaigns | Influencer collaborations Co-branded collections |

Figure 6- Definitive category system

Customer Journey at the store:

Most customers who visit stores that sell ZEISS do so with prescriptions in hand, but a group of consumers also make appointments for eye tests. There are two discrete consumer segments: the first has established brand preferences, while the second is not brand-aware. Consumers frequently give prescriptions that list the specific types of lenses rather than brand names, and many are persuaded by friends or family who are already these stores' customers.

Some consumers may come into stores that do not sell ZEISS lenses with prescriptions, but many others rely on in-store optometrist services, as seen before. Particularly younger clients spend more time selecting frames than discussing lenses options.

«Within the realm of customer preferences, two distinct types emerge. The first group arrives with a pre-established brand preference, often shaped by recommendations from friends or personal research. On the contrary, the second group lacks any specific brand awareness. »

Consumer Concerns:

Stores that offer ZEISS lenses frequently hear concerns about cataracts, vision loss, and dry eyes. Younger patients, between 18 and 25 years old commonly associate poor vision with using technology excessively. People often ask about quality lenses, especially those from well-known manufacturers like Essilor or ZEISS.

Concerns about eye health, changing vision, and selecting appropriate glasses are common in stores without ZEISS lenses. Headaches, eye tiredness, and specifics regarding the lenses selections and frame styles are among the often questions asked. 60% of visitors in the 20–40 age range have myopia, which prompts questions regarding the newest treatments and advancements in lenses technology to manage this issue.

«Frequently, customers inquire about renowned brands like Essilor or ZEISS, reflecting a strong inclination towards trusted names in the optical industry. »

Lenses Brand Awareness:

Customers who shop at stores that sell ZEISS are usually aware of the different lenses' brands available; names like Hoya, Essilor, and Carl ZEISS are frequently brought up. Hoya is becoming more well-known, especially for its ability to correct childhood myopia.

Stores without ZEISS lenses observe that older customers are aware of several lenses manufacturers, including Essilor and ZEISS, which are known for their superior quality, cutting-edge coatings, durability, and UV protection. With the launch of Hoya lenses gaining traction, younger customers at these stores are less brand-focused and frequently select more affordable solutions. Varilux (a brand that belongs to Essilor) is also mentioned because of their advertising on television as being high quality on progressive lenses.

«Consumers recognise brands like Essilor and ZEISS due to their long-standing market presence and history, we often introduce them to Hoya lenses, a Japanese brand that offers advanced features and benefits. »

Impact of digital platforms:

The target audience in stores that sell ZEISS lenses is generally older, baby boomers, with limited access to digital platforms. However, the younger audience still engages with online advertising. Stores without ZEISS lenses experience limited impact from digital platforms, especially for older generations. Still, there is an increasing influence on younger consumers, shaping their ideas about frames, particularly for blue light protection, through online sources.

«Nowadays the impact can be seen, people are more aware of brands and technologies. »

Vision needs:

In stores that sell ZEISS lenses, myopia and astigmatism are prevalent in younger individuals, while hyperopia and presbyopia are common in those over 43 years old. Stores without ZEISS lenses encounter common vision problems, including myopia, hyperopia, astigmatism, and presbyopia. Myopia is a prevalent issue, especially among young adults.

«The vision problems or needs that we most detect are myopia and astigmatism in younger people and hyperopia and presbyopia in people aged 43 and over. »

Preferred lenses features:

Consumers in stores selling ZEISS lenses look for durability, clarity, UV protection, anti-glare coatings, and blue light protection. Progressive glasses users prefer lenses with a wide field of vision. Wearers of progressive glasses prefer a wide field of vision lenses.

Customers in stores without ZEISS lenses place a higher value on lenses durability, clarity, blue light protection, and UV protection. Protecting against blue light is becoming more and more popular, especially with younger customers.

« In the process of selecting lenses, consumers express a keen interest in features that cater to a diverse set of needs. The focal point lies in customizing solutions to individual concerns. »

Investment decisions:

Customers are open to more and less expensive options regarding lenses pricing at ZEISS lenses stores. The majority of consumers have little money to spend, however they take advantage of in-store discounts and use health insurance to offset costs related to their purchases.

Investment decisions are frequently influenced by the presence of insurance in stores that do not carry ZEISS lenses. There are differences in the willingness of consumers to invest, so having a guarantee is expected and crucial.

«Customers are open to a mix of options, opting for both affordable and higher-end lenses. »

Sustainability initiatives:

Stores that sell ZEISS lenses, like MultiOpticas, have sustainability programs. Opticalia Santa Maria has no current sustainability initiatives, but there was a service for restoring and donating unused glasses before the COVID era. Stores without ZEISS lenses currently lack return programs but note growing consumer interest in sustainability.

«The positive response from consumers indicates a growing sensitivity to environmental concerns. This aligns with a broader trend of consumers becoming more conscious of the ecological impact of their choices. »

Recent trends:

Retailers of ZEISS lenses observe a change in the population's need for glasses, with a rise in their usage to reduce headaches and avoid eye strain. Young people are starting to wear glasses as fashion accessories and vintage styles are becoming more and more popular. Interest in contact lenses, particularly progressive contact lenses, is rising.

Due to increased screen time, there is a growing need for blue light filtering lenses in stores that do not carry ZEISS lenses.

« The motivation for wearing glasses has expanded beyond mere vision correction to include mitigating headaches or preventing visual strain, even in cases where individuals possess adequate vision. »

Campaign suggestions:

In campaign suggestions they mentioned taking advantage of direct feedback loops, and to inform people of the treatment of children's myopia regression. It is imperative that the campaign emphasises information about myopia regression and its different aspects. Also informing about the effects of computer screens on eye health and to run marketing campaigns featuring lenses that have blue light filtering capabilities.

« For communication campaigns, focusing on educating consumers about the impact of digital screens on eye health and promoting lenses with blue light filtering technology would be effective. »

4.2.3 Limitations

This qualitative research has limitations that are followed by recommendations for future studies. Firstly, bias may be introduced when the interviewee sample might not be

representative of the general population. Moreover, it is possible that participants won't remember certain events or experiences correctly, which could cause inaccuracy in their answers. Also, since the study only looks at one point in time, it might not be able to track changes over time in consumer trends, preferences, or behaviour.

Upon gaining a nuanced understanding of the perceptions by the Portuguese population and the experts working in optical businesses, a careful Customer Decision Journey is conducted below.

5. The Consumer Decision Journey

Consumers can easily go through a lot of information about products and services available to them these days on their own. They can now get information and education without depending on physical retail establishments. Alternatively, they can proactively investigate possible purchases, go through reviews, and familiarize themselves with brands (Harvard Business Review, 2015).

As a result, modern consumers possess an unparalleled degree of knowledge and consciousness. As such, it is strategically necessary to interact with them at critical moments when their decision processes are most susceptible to being influenced.

The Consumer Decision Journey describes the steps a customer takes from learning about a product or service to deciding whether to buy it. This process acknowledges that there are numerous touchpoints and brand interactions along the non-linear path to purchase (McKinsey, 2009). Aligning business strategies with consumer needs and behaviours is the ultimate goal for comprehending the Consumer Decision Journey. This fosters a relationship that extends beyond individual transactions and helps businesses succeed in the long run.

Considering the enlightening interviews with optometrists, two distinct customer segments that visit their stores have been identified. The first one is people who are already aware of the brand they want to purchase (brand-driven persona) and the second one is people who lack brand awareness and therefore look for help in-store, addressing their needs and concerns (brand seeker persona).



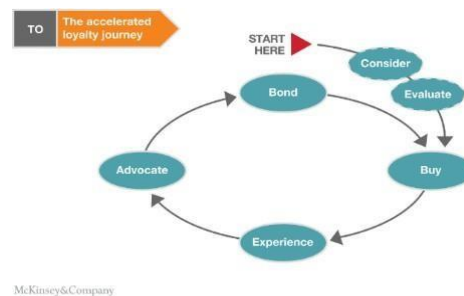
| |  Brand Driven Persona |  Brand Seeker Persona |
|------------------------------|--|---|
| Name | Sara Dias | João Santos |
| Demographics | 35 years old Marketing Manager Monthly income of 5000 euros Born and raised in Porto | 27 years old Graphic Designer Monthly income of 2000 euros Born and raised in Lisbon |
| Goals and Pain Points | Goal: Stay updated with the latest ZEISS products and technologies Pain Point: Limited time for in-store visits due to a busy schedule | Goal: Find stylish eyewear that complements personal style and lenses that address vision concerns Pain Point: Overwhelmed by the variety of lenses options and uncertain about the best choices |
| Decision Journey | Awareness: Regularly follows ZEISS on social media and subscribes to newsletters Consideration: Researches online, reads reviews, and compares ZEISS products before making a purchase decision | Awareness: Has limited knowledge about lenses brands and relies on in-store assistance Consideration: Seeks advice from optometrists, and values staff recommendations |

Figure 7- ZEISS Customer Decision Journey

These segments offer ZEISS significant opportunities to strategically leverage the current circumstances. ZEISS can maximize the impact of its initiatives in the current market space by optimising its approach and customizing its offerings to effectively cater to the specific needs and preferences of each segment.

Throughout the years, the customer decision journey suffered changes due to the increasing relevance of the digital world. Consumers are part of an interconnected world, and their decision-making is less linear but instead multi-dimensional and cyclical. The different touchpoints at the early stages of the decision-making process impact consumers before entering the (physical) store (Deloitte, 2020). According to McKinsey (2015), the decision-

making process begins with a **trigger** and is followed by **consideration, evaluation, purchase, post-purchase experience, and advocacy.**



McKinsey&Company
 Figure 8- Customer Decision Journey Source:
 McKinsey, 2015

These stages will take into consideration the information retrieved from a market study conducted by Bolt and provided by ZEISS Vision Care, along with the insights gathered from the qualitative (semi-structured interviews conducted with optometrists) and quantitative research (survey answered by the Portuguese population).

The identification of a need marks the beginning of the consumer decision journey. Several factors can cause consumers to realise they need new lenses. These **triggers** include a wide range of problems, such as problems with current lenses, changes in prescription, or lifestyle adjustments. There are situations where the need for new lenses might become more apparent, for instance, after visiting an ophthalmologist, before a planned optometrist appointment, or when vision-related issues are discovered (Bolt, 2022).

Consideration is a crucial phase that marks the beginning of consumer activity where they actively search for brands that suit their tastes and conduct research to determine which option is best for them. This stage is marked by a propensity to browse different options. Customers tend to take inspiration from the abundance of information on the internet, which helps to mold their tastes and impact how they make decisions.

Only after the trigger situations, do people tend to look for information (Bolt, 2022). This can justify the segment and the survey's clear lack of brand awareness.

However, without having a pre-established preference for a particular eyewear brand, ZEISS can effectively target this segment, by fostering a certain level of brand familiarity.

Due to the high-involvement nature of the purchase, particularly when it comes to health-related issues and significant financial implications, consumers are more likely to look for detailed brand information that happens in the following stage.

In the **evaluation** stage, buyers actively look for information to compare various options. This could entail reading reviews, comparing features, and obtaining feedback from a range of sources. The digital environment has given consumers the ability to independently perform in-depth research.

Furthermore, consumers research various factors, including lenses materials, coatings, and price, when considering new lenses. They may compare different lens types, such as single vision, bifocal, or progressive lenses. Regarding the most needed information the ones that stood out in Portugal were first promotions, then appointment scheduling, possible solutions for vision problems, lens types, and suitable/ nearby opticians (Bolt, 2022).

In the **purchase**, customers decide what to buy after gathering sufficient information and weighing their options. This was the point where traditional models frequently stopped, presuming that the sale was the end goal.

It is important to recognise that some consumers might choose not to perform online research, which could mean they are not impacted by the previously listed online activities, of the previous stages. Businesses that streamline the customer journey by reducing or even doing

away with the consideration and evaluation stages will have a distinct edge over their competitors (McKinsey, 2015).

As mentioned before, when consumers arrive at the physical store, a clear division in their behaviour emerges: some have pre-established brand preferences and make the purchase right away, while others are still in the decision-making stage.

The decision-making process of the second group depends on crucial factors. As seen in the survey, elements like the brand's reputation for lenses, suggestions made by optometrists or opticians or store employees, and offered discounts stand out as critical determinants influencing consumers' final decisions.

In the Bolt study (2022), a value-driven consumer trend is popular among people in the UK, USA, Italy, Brazil, Portugal (52%), and Spain. Moreover, 32% of Portuguese consumers base their selections on the cheapest offer, but 45% are impacted by the optician's suggestion. Remarkably, just 13% percent of people are impacted by lenses brand websites, they prefer to check the websites of optical retailers. Additionally, a noteworthy trend in consumer behaviour is also seen, people do not always choose companies that are promoted in stores or through other channels (Bolt, 2022).

The McKinsey model goes beyond the transaction, acknowledging the importance of the **post-purchase experience**. Following a purchase, customers develop opinions based on their impressions, which can affect their decisions going forward and their loyalty to a particular brand.

After purchasing lenses, Portuguese consumers critically assess their level of satisfaction with the chosen eyewear. This might also include issues resolutions, filing warranty claims, or

reaching out to customer service. After paying in-store, customers get a card with a QR code that contains their prescription information. But is possible for younger people to wonder if it makes sense to keep a physical card. This reflection highlights the changing inclinations and tastes of modern Portuguese consumers about technology.

Affordability and quality are the main triggers for better experiences. Indians, Brazilians, Portuguese, and Spanish consumers focus on price/promotions and quality more. (Bolt, 2022)

Lastly in the **advocacy** stage, satisfied consumers start to promote the brand. They spread the word about the product through word-of-mouth marketing, sharing their positive experiences. One of the most effective ways to attract new customers is through advocacy.

In this last stage, some customers might leave online reviews or recommend the product to others. In Portugal, 79% look for referrals, and 32% are value conscious. (Bolt, 2022) When researching online for ZEISS lenses reviews, there aren't many people who regularly post evaluations, which means that there isn't a lot of relevant and substantial information available. The lack of reviews is problematic since it limits the amount of detailed information about user experiences that is available.

5.1. Recommendations

After analyzing the current customer journey, is perceptible what are the pain points to be addressed and touchpoints to be reinforced.

In the **trigger situations**, although customers may be able to understand on their own why they need the product (actual need), ZEISS must take a **proactive** stand that will help customers understand why they need it and act as a catalyst to encourage them to do so (provoked need), a new trigger can be created by online eye care test ads in strategical places to start to **build** a

need and the **recognition** of the brand. This strategical approach ought to be focused on actively interacting with clients at significant touchpoints, guaranteeing that ZEISS stays at the top of their minds when weighing lenses-related choices. So, ZEISS could:

- Create a new trigger through promotional awareness eye care test ads in strategic places.
- Actively interact with clients at significant touchpoints to build brand recognition.

Regarding **consideration**, ZEISS should continue to focus on **brand awareness** maintaining a consistent and logical presence through various communication channels, including traditional and digital media, for consumers to consider the brand as a possible solution.

Committing to well-thought-out brand-building initiatives and advertising where favorable connotations are capitalised and top-of-mind brand recognition is present, an emotional approach could be considered to strengthen the relationship between consumers and the brand.

The importance of **digital content** in today's business environment highlights its crucial role. For ZEISS, maintaining customer attention and taking advantage of outreach opportunities requires an investment in **keyword search optimisation**. With this focused approach, the consumer will reach the brand in a faster and simpler way moreover the consumer's mind is intended to be left with a lasting impression that serves as a basis for further thought, even if it isn't entirely conscious.

For consideration is suggested to:

- Focus on brand awareness to position ZEISS as a potential solution.
- Implement well-thought-out brand-building initiatives and advertising for top-of-mind recognition.
- Invest in keyword search optimisation.

In the **evaluation** stage, concurrently with an awareness of the identified value-based preferences of Portuguese consumers, ZEISS needs to focus its efforts on market **education**. This entails explaining the unique advantages that come with ZEISS lenses, with lead generation techniques, such as offering downloadable materials and hosting webinars, to engage and develop prospective leads actively. Highlighting the product's unique selling propositions (USPs) to set ZEISS apart from the competition and increase its appeal. Lastly, another recommendation would be to display reviews, and testimonials as effective tools to gain the confidence and trust of customers. Therefore, ZEISS should:

- Educate the market on the unique advantages of ZEISS lenses through lead generation techniques.
- Highlight product USPs to set ZEISS apart and increase appeal.
- Utilize reviews and testimonials as effective tools to gain customer trust.

When the customer is making their **purchase**, we understand affordability has a huge impact when Portuguese people are deciding which brand to purchase, but since ZEISS is a premium brand, it can't compete with price, and it can't be advertised. Their best option would be for people to come educated and informed about the benefits of ZEISS lenses, leading to the materialization of an aspiration that emerges naturally from the previous stages.

Considering the website visits, ZEISS could invest in having a bigger presence on the stores' websites, or a link to lead them to their website for people to know more about the brand.

But those who do not search the brand before the purchase, and therefore aren't educated and aware from the previous stages, only have the in-store experience to decide. Considering this

segment of people ZEISS needs to fortify its alliances with the optical stores, tailoring marketing tactics to the specific store and the consumer inclinations.

To differentiate ZEISS from the competition, they could implement an engraving service making the purchase more personal, consequently improving the consumer's journey by building a connection to make the consumer feel unique and consequently proud in wearing the brand.

Considering what is described above, it is important to:

- Enhance website presence on stores' websites or provide links for brand exploration.
- Strengthen alliances with optical stores, tailoring marketing tactics to specific stores and consumer inclinations.
- Implement an engraving service.

In the **post-purchase**, the development of an e-mail marketing communications strategy after the purchase should be prioritised, this action will help ZEISS meet consumer expectations for quality. This entails sending pertinent information via AI-powered channels, such as expressing gratitude for the purchase, requesting product feedback, prompt resolution of any possible issues or questions, and the information of their prescription instead of the physical card.

In addition, ZEISS could offer educational resources that optimise the value of the acquired product. These materials could include tips for making the best use of the product for maintenance and care, understanding that knowledgeable customers are more likely to have improved experiences. (PWC, 2018) This educational strategy is consistent with the brand's commitment to customer satisfaction and the development of post-purchase services.

ZEISS could strengthen its customer support services by providing individualised contact to guarantee effective resolutions. Using AI chatbots as an option could improve customer relations and speed up response times. Customers' trust in the ZEISS brand is strengthened, which also makes a substantial contribution to the perception of the product.

To sum up the recommendations in this stage would be to:

- Develop an e-mail marketing communications strategy to meet consumer expectations for quality.
- Use AI-powered channels for post-purchase interactions, including expressing gratitude, seeking feedback, and resolving issues promptly.
- Offer educational resources to optimise the value of the acquired product for improved customer experiences.

In the last stage, **advocacy**, is emphasised how crucial it is to actively solicit and reward customers for providing feedback since a more comprehensive representation of reviews is necessary to give potential customers a picture of the company and its products. By resolving this pain point, ZEISS will be able to improve the authority and educational value of its web presence, which will eventually lead to increased customer confidence.

Given the above-mentioned context, the main focus should be on becoming top of mind regarding brand lenses and providing the most satisfying experience with the brand post-purchase, to retain customers and for them to consequently become loyal and proud consumers of ZEISS Vision Care. It is advisable for ZEISS to:

- Actively solicit and reward customers for providing feedback to enhance the authority and educational value of ZEISS's web presence.

- Improve customer support services with individualised contact and consider AI chatbots for efficiency.
- Increase customer confidence through a comprehensive representation of reviews and testimonials.

After considering the current decision-making procedure and the suggested improvements and recommendations, it is critical to emphasise the importance of tracking the success of marketing initiatives. Monitoring key performance indicators (KPIs) makes it easier to adapt the marketing plan iteratively, ensuring that it changes in response to changing consumer preferences and behaviors, ultimately optimising results, and getting the best potential outcomes.

Despite the general recommendations for improvement in the customer decision journey, which should be kept in mind for ZEISS’s future, the most relevant insights and stages to be covered will be addressed and developed in the Marketing Communications Plan & Creative Strategy.



Figure 9- ZEISS Customer Decision Journey

5.1.1. Media Timeline

For a successful execution of Zeiss Vision Care's IMC campaign in Portugal is mapped out over a meticulously planned 12-month timeline, strategically segmented into four distinct phases: Pre-Launch, Launch, Sustaining, and Review. This carefully crafted timeline begins with a three-month Pre-Launch phase, where initial market research is conducted to refine the campaign strategies, followed by the planning and development of creative assets. The Launch phase, spanning the subsequent two months, marks the official commencement of the campaign, characterised by a synchronised rollout of digital and traditional media efforts, including intensive social media advertising and the initiation of outdoor placements.

As we progress into the Sustaining phase in the next four months, the focus shifts to maintaining a robust digital presence with ongoing social media engagement and email marketing

campaigns, complemented by experiential marketing event- university pop-up stations. This phase also encompasses community outreach activities, like the distribution of educational Foldscopes, to reinforce the brand's commitment to social responsibility and education. The final phase, Review and Optimisation, occupies the last three months of the timeline. Here, a comprehensive analysis of the campaign's performance across all channels is conducted, leading to strategic adjustments and realignments based on data-driven insights. This phase is critical for fine-tuning the campaign in response to audience feedback and market dynamics, setting the stage for subsequent marketing initiatives.

This strategic timeline not only ensures a coordinated and effective rollout of Zeiss Vision Care's marketing activities but also facilitates ongoing evaluation and adaptability, crucial for maintaining the campaign's relevance and impact throughout its duration. By following this structured approach, the campaign is poised to achieve its objectives, resonating with the target audience and solidifying Zeiss Vision Care's presence in the Portuguese market.

Besides the actions recommended, other suggestions can be kept in mind for further initiatives.

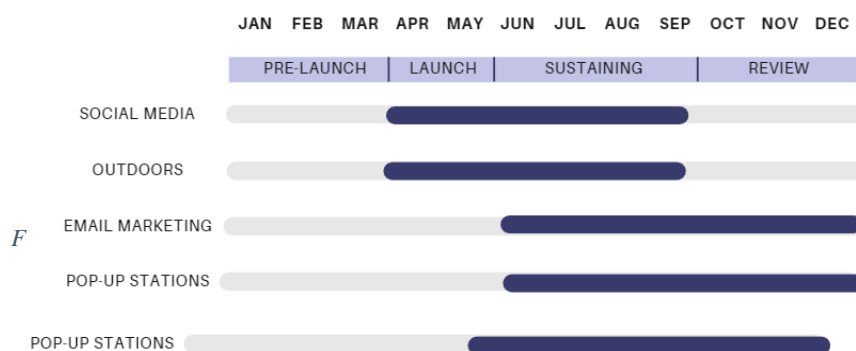


Figure 15- Campaign's Timeline

5.2. Other Recommendations

In addition to the proposed campaign initiatives, there are other recommendations outlined in this chapter. These initiatives, while being as valuable, are presented here as supplementary options due to the already robust lineup of activities planned for the year.

“ZEISS as Sustainability Partner at Moda Lisboa Fashion Week” (*Event collaboration*)

This partnership is designed to blend ZEISS's innovative optical solutions with Moda Lisboa's commitment to sustainable fashion. The objective is to position ZEISS as a brand synonymous with sustainable luxury and contemporary style, resonating with the values of an environmentally conscious audience, especially Generation Z.

Central to this initiative would be the establishment of the 'ZEISS Eco-Fashion Zone' at Moda Lisboa (visual in Appendix 18). This space would serve as a showcase for ZEISS's latest range of climate-friendly eyewear (ZEISS, n.d.), demonstrating how sustainable materials and advanced manufacturing techniques can come together to create stylish and environmentally responsible products. The Eco-Fashion Zone aims to educate visitors about sustainable practices in eyewear production while also highlighting the aesthetic appeal of ZEISS's products. 'ZEISS x Moda Lisboa Design Collaboration' would be a unique venture where ZEISS will partner with selected fashion designers from the event to create an exclusive collection of sustainable eyewear. This collection would embody the fusion of high fashion with functional, eco-conscious design.

Additionally, the 'ZEISS Sustainability Symposium', a series of panel discussions and workshops, featuring experts from the fashion and vision care industries, would provide a platform for discussing the future of sustainable materials and technologies, reinforcing ZEISS's role as a thought leader in this space. The introduction of the 'ZEISS Award for Sustainable Fashion Innovation' would recognise and honour designers who integrate sustainable practices into their work, thus promoting a culture of environmental consciousness within the fashion industry. In conclusion, this initiative aims to establish ZEISS as a brand that embodies the ethos of sustainability, innovation, and style, appealing to a generation that deeply values the health of their eyes and the environment.

“ZEISS Visionary Explorers- Distribution of Paper microscopes” *(At schools)*

This is a strategic and innovative program designed to build brand awareness and influence within a key indirect demographic: children and teenagers aged 10-18. Although this age group is not the direct target audience for ZEISS, this initiative plays a crucial role in influencing the purchasing decisions of their parents, particularly in the context of buying myopia glasses for children.

Situated in the trigger stage of the customer journey, the "ZEISS Visionary Explorers" program (visual in Appendix 19), leverages the natural curiosity and influence of young students. By engaging them in the world of optics by distributing low-cost paper microscopes branded with the ZEISS logo in schools, the initiative not only enriches their educational experience but also subtly embeds the ZEISS brand in their everyday learning and play. This strategy is particularly effective in creating early brand recognition and preference, which in turn can influence the purchasing decisions of their parents, the primary decision-makers for children's eyewear. This initiative also aligns with SDG 4 (Quality Education). It focuses on enhancing educational experiences through innovative tools and promoting scientific exploration among the youth.

The two extra initiatives are resumed in the following table:

| Initiative | Customer Stage | SDGs | Platform | Target Audience |
|---|------------------------|---|--------------------------|--|
| ZEISS Visionary Explorers | Trigger | SDG 4 (Quality Education) | Schools | Children (10-18), Teenagers, Influencing parents |
| ZEISS Partnership with Moda Lisboa | Trigger, Consideration | SDG 11 (Sustainable Cities and Communities) | Moda Lisboa Fashion Week | Urban commuters (25-40), Environmentally conscious individuals |

Figure 16- Recommendations Overview

6. Conclusion

This Work Project was centred on developing a solution to address the proposed research question by ZEISS Vision Care Portugal on "How to make the end consumer proud to wear ZEISS lenses?".

In order to understand the Portuguese consumer behaviour, extensive primary and secondary research was conducted, as well as a comprehensive analysis of ZEISS's strengths and weaknesses.

The core objective is to elevate ZEISS lenses into an aspirational brand, sought after by consumers, focusing on the younger generation increasingly affected by digital eye strain and the middle-aged generation valuing established quality and brand reputation. One of the challenges identified includes shifting the focus from fashion to the functionality and health benefits of eyewear, enhancing brand awareness, and fostering a sense of pride that sustains brand loyalty across diverse age groups.

ZEISS's business model and its value proposition based on quality, innovation, brand heritage, and sustainability are pivotal in understanding the brand's market approach. The targeting strategy was meticulously crafted, focusing on younger adults (20-30 years old) with a need for technologically advanced lenses and a middle-aged demographic (30-40 years old) loyal to the brand's quality and reputation. The personas made, represent these segments, guiding to a tailored Marketing campaign, addressing their needs.

The Marketing Communications Plan & Creative Strategy outlined is a sophisticated blend of targeted engagement, brand storytelling, and interactive initiatives, creating brand awareness

and recognition in the consumers' mind. These proposals are designed to engage both direct and indirect target audiences effectively.

The Media Strategy incorporates a blend of digital and traditional channels, leveraging platforms like TikTok, Instagram, Facebook, YouTube, and E-mail marketing, complemented by outdoor advertising and experiential marketing. This strategic mix ensures a wide reach and deep engagement with the target audience.

In conclusion, this Work Project had the objective of providing a detailed blueprint for ZEISS Vision Care to elevate its brand presence in the Portuguese market. By addressing the unique needs of different age groups, and leveraging a comprehensive strategy, ZEISS can foster a sense of pride among consumers in choosing its lenses. This approach not only positions ZEISS as a strong player in the optical industry but also revolutionises the way consumers perceive and choose eyewear, aligning with modern lifestyles and values. The future of ZEISS Vision Care in Portugal, as outlined in this report, is one where consumers are not just customers but proud ambassadors of a brand that stands for excellence, innovation, and a commitment to enhancing life through better vision.

References

ZEISS, 2022 “(What Is Blue Light and How Can I Protect My Eyes from It?)”

<https://www.zeiss.com/vision-care/en/eye-health-and-care/health-prevention/what-is-blue-light-and-how-can-i-protect-my-eyes-from-it.html#blueguard-lenses>.

ZEISS, n.d. ‘Discover the Difference. Wear It, See It’ – the New Global Marketing Campaign.”

ZEISS. <https://www.zeiss.com/vision-care/en/newsroom/news-overview/2021/new-global-marketing-campaign-zeiss-smartlife.html>

Anagram, 2021. “9 Optical Metrics You Should Be Tracking.”

<https://www.anagram.care/blog/retail-optical-benchmarks>

ZEISS, 2019 “A Small Click on the Shutter Release – and a Giant Leap in Photography for Mankind.”

<https://www.zeiss.com/corporate/en/about-zeiss/present/newsroom/press-releases/2019/moon-landing.html>.

ZEISS. n.d. “Beyond All Borders.” ZEISS International.

<https://www.ZEISS.com/corporate/int/careers/influence/beyond-all-borders.html>

ZEISS. n.d. “Brand.” n.d. ZEISS. <https://www.ZEISS.com/zoom-med/int/home/zoom-med-2-2019/brand.html#seeingbeyond>

DREAMMEDIA, n.d. “Cities.” <https://dreammedia.pt/pt/as-nossas-solucoes/outdoors-estaticos/cities>

Numbeo, n.d. “Cost of living in Portugal” 2023 https://www.numbeo.com/cost-of-living/country_result.jsp?country=Portugal.

ZEISS. n.d. “Customer Support.” ZEISS United States.

<https://www.ZEISS.com/metrology/services/customer-support.html>.

EUR-Lex, 2017 “EUR-LEX - 32017R0745 - EN - EUR-LEX.” <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32017R0745>.

ZEISS. n.d. “Everything You Should Know about Your New ZEISS Precision Lenses.” ZEISS <https://www.ZEISS.com/vision-care/en/eye-health-and-care/everything-you-should-know-about-your-new-ZEISS-precision-lenses.html>

Aaker, 1991 “Aaker’s Brand Equity Model Source: Aaker (1991: 270).” n.d. ResearchGate. https://www.researchgate.net/figure/Aakers-brand-equity-model-Source-Aaker-1991-270_fig1_317952494#:~:text=The%20customer%2Dbased%20brand%20equity,the%20B2B%20and%20service%20contexts.

Ucon, 2022. “How Much Does an Exhibition Stand Cost | UCON Exhibitions”. <https://ucon.com.au/blog/exhibition-stand-cost/> <https://ucon.com.au/blog/exhibition-stand-cost/>

WebFX, 2023. “How much does email marketing cost in 2024?”. <https://www.webfx.com/email-marketing/pricing/>

WebFX, 2023. “How Much Does It Cost to Advertise on Instagram?”. <https://www.webfx.com/social-media/pricing/how-much-does-it-cost-to-advertise-on-instagram/#:~:text=How%20much%20do%20Instagram%20ads,type%2C%20industry%2C%20and%20more>

Meta, n.d. “Log into Facebook.” Facebook. <https://www.facebook.com/business/tools/ads-manager/>

Investguiding, 2023. “How Profitable Are Optometry Practices? (2023).” https://investguiding.com.ngontinh24.com/articles/how-profitable-are-optometry-practices#google_vignette

ZEISS, 2019 “If Your Child Has Blurred Vision, It Could Be a Warning Sign of Myopia (Short-Sightedness).” <https://www.zeiss.com/vision-care/en/eye-health-and-care/understanding-vision/if-your-child-has-blurred-vision-it-could-be-a-warning-sign-of-myopia-short-sightedness.html>.

Data guidance, 2023 “Portugal - Data Protection Overview.” 2023. DataGuidance. August 3, 2023. <https://www.dataguidance.com/notes/portugal-data-protection-overview>.

Corporate Finance Institute, “Profit and Loss Statement (P&L).” 2023. <https://corporatefinanceinstitute.com/resources/accounting/profit-and-loss-statement-pl/>

Click and Play Studio - Produtora Video | Filmagens | Filmagens, Produção Video 4K e Fotografia, 2019. “Quanto Custa Um Vídeo Promocional?” <https://clickandplay.pt/quanto-custa-um-video-promocional/>

INE, 2023 “Statistics Portugal - Web Portal.” https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=593653510&DESTAQUESmodo=2.

Marketing Campaign Management. n.d. “What Are the Best Criteria for Segmenting Your Customers?” LinkedIn. [What are the best criteria for segmenting your customers? \(linkedin.com\)](https://www.linkedin.com/company/marketing-campaign-management/post/6948111111111111111)

European Medicines Agency, 2023. “Medical Devices.” December 6, 2023. <https://www.ema.europa.eu/en/human-regulatory-overview/medical-devices>.20, 2023.

Statista, 2023 “Eyewear - Portugal.” Statista, 2023 “Eyewear - Portugal.”

Farhana, Mosarrat. 2012. “Brand Elements Lead to Brand Equity: Differentiate or Die.” *Information Management and Business Review* 4, no. 4 (April): 223–33. [FULLTEXT01.pdf](#)

diva-portal.org

Lumen Learning. “Principles of Marketing: Segmentation Criteria and Approaches.”

[Segmentation Criteria and Approaches | Principles of Marketing \(lumenlearning.com\)](https://lumenlearning.com/segmentation-criteria-and-approaches/)

McKinsey & Company. 2012. “Insights from McKinsey’s Global Consumer Research — The Young and the Digital: A Glimpse into Future Market Evolution.” [Digital Divide whitepaper](https://www.mckinsey.com/~/media/McKinsey/Client%20Service/Consumer%20Practice/2012/01/19/2012_indd_mckinsey.com)

[01192012.indd \(mckinsey.com\)](https://www.mckinsey.com/~/media/McKinsey/Client%20Service/Consumer%20Practice/2012/01/19/2012_indd_mckinsey.com)

Samson, John. 2023. “Eyewear Market Share Analysis, Regional Demand and Forecast to 2032”. LinkedIn, June 23, 2023. <https://www.linkedin.com/pulse/eyewear-market-share-analysis-regional-demand-forecast-john-samson/>.

Statistics Portugal. 2023. “External Balance of the Portuguese Economy Increased to 2.7% of GDP - 3rd Quarter 2023.” December 22, 2023. [Portal do INE](https://inec.pt/pt/indicadores/indicadores-externos/indicadores-externos-3o-trimestre-2023)

ZEISS. 2020. “Green, Safe & Responsible – For Greater Sustainability in Eye Care.”

ZEISS. 2021. “Challenge the Limits of Imagination: Sustainability Report 2020/21.”

[zeiss.com/content/dam/media/Download/sustainability-report-2020-2021-en.pdf](https://www.zeiss.com/content/dam/media/Download/sustainability-report-2020-2021-en.pdf)

ZEISS. n.d. “Lens in a Square: The ZEISS Logo.” [The ZEISS Logo – Development | ZEISS](https://www.zeiss.com/branding/logo/)

ZEISS. n.d. Value for Society: ZEISS’ Contribution to the Common Good.” [ZEISS common good – for a healthy society](https://www.zeiss.com/value-for-society/)

ZEISS. n.d. “ZEISS Branding Guidelines for Eye Care Professionals and Business Partners.”

[Partner Branding Guideline \(zeiss.com\)](https://www.zeiss.com/branding/guidelines/)

ZEISS. n.d. “ZEISS Group: Facts & Figures.” [Facts & Figures | ZEISS Group](#)

ZEISS. n.d. “ZEISS Packaging Frequently Asked Questions.” ZEISS VISION CENTER. Accessed October 28, 2023. https://www.zeissvisioncenter.com/en_be/zeiss-vision-center-optiek-jo-zulte/products/zeiss-precision-lenses.html.

Best, Best of The. 2023. “Precision Optics Changing 2024: Shaping the Future.” Wavelength Opto-Electronic (blog). December 2, 2023. <https://wavelength-oe.com/articles/precision-optics/>.

Bolt study (2021), provided by ZEISS Vision Care

Camilleri, Mark. 2017. “Market Segmentation, Targeting and Positioning.” ResearchGate. December 2017. https://www.researchgate.net/publication/319085560_Market_Segmentation_Targeting_and_Positioning

Cazin, Natasha. “Global Consumer Trends for 2022 in Eyewear.” Euromonitor, November 10, 2022. <https://www.euromonitor.com/article/global-consumer-trends-for-2022-in-eyewear>.

CFI. 2022. “Pull Marketing Strategy.” Corporate Finance Institute. December 6, 2022. <https://corporatefinanceinstitute.com/resources/management/pull-marketing-strategy/>

Court, David, Dave Elzinga, Susan Mulder, and Ole Jørgen Vetvik. 2009. “The Consumer Decision Journey.” Mckinsey & Company. <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-consumer-decision-journey>.

Dan. 2013. “Market Positioning - the Strategic CFOTM.” <https://Strategiccfo.com/>. 2013. <https://strategiccfo.com/articles/profitability/market-positioning/>

Edelman, David C., and Marc Singer. 2015. "Competing on Customer Journeys." Harvard Business Review. <https://hbr.org/2015/11/competing-on-customer-journeys>.

Edelman, David C., and Marc Singer. 2015. "The New Consumer Decision Journey" | McKinsey. <https://www.mckinsey.com/capabilities/growth-marketing-and-sales/our-insights/the-new-consumer-decision-journey>

European Institute for Brand Management. "Kapferer's Brand-Identity Prism Model." https://d1wqtxts1xzle7.cloudfront.net/36721515/v - Het Brand-Identity Prism model van Kapferer EN -Libre.Pdf?1424550252=&response-Content-disposition=inline%3B+filename%3DKapferers Brand Identity Prism model.pdf&Expires=1703069417&Signature=B3M4iUeGuVH0EozDLfMpPTJMtwanQg185D53XAruc7ehJ8MbVtzuDdny3Oqu08Kvhyh7MvbLkx4~qGgf-Kz2BiM6bLdSEfw6HllhXRhJDXogeBO9gkXeAMM0x9c3eCuDIWZdoDixbuwuXH474aipz-GV4k62tnvNLVBjyPDbUyYJGEPXMHJPK9b~X4qn3ei9VU9JqxTNUC0w~mGmZLF4jViV1KPs6QvX8dEX~Wj9M3O1R3Vvct3UQ6I-dLysHXn9PXHj6OTeJYMDHZLpqKUB8O6f1DuGisEa08nE419cR0RvMi51cWolCZCndcP6dzIcz80eWkq8GwJ8vh64riRXg_&Key-Pair-Id=APKAJLOHF5GGSLRBV4ZA

Fleetwood, Dan. 2018. "Psychographic Segmentation: Definition, Variables, Examples and Advantages | QuestionPro." QuestionPro. July 10, 2018. <https://www.questionpro.com/blog/psychographic-segmentation/>

Geyser, Werner. "How Much Do Tiktok Ads Cost?" Influencer Marketing Hub, October 18, 2023. <https://influencermarketinghub.com/how-much-do-tiktok-ads-cost/>

Geyser, Werner. "How Much Do YouTube Ads Cost? [Updated 2024 Guide]." Influencer Marketing Hub, November 15, 2023. <https://influencermarketinghub.com/how-much-do-youtube-ads-cost/>

Gillum, Scott. "Gyro Brandvoice: How Marketing Impacts Sales Performance." Forbes, March 3, 2013. <https://www.forbes.com/sites/gyro/2013/02/25/how-marketing-impacts-sales-performance/?sh=2b5ba8c514a8>

Gong, Yanping, Jun Xiao, Xiuyuan Tang, and Jinglu Li. 2023. "How Sustainable Marketing Influences the Customer Engagement and Sustainable Purchase Intention? The Moderating Role of Corporate Social Responsibility." *Frontiers in Psychology* 14 (March). <https://doi.org/10.3389/fpsyg.2023.1128686>.

Grzesiak, Mateusz. 2015. "E-Branding vs Traditional Branding." *Depot.ceon.pl*. <https://depot.ceon.pl/handle/123456789/12804>

Gupta, Suraksha, David Galliar, John Rudd, and Pantea Foroudi. 2020. "The Impact of Brand Value on Brand Competitiveness." *Journal of Business Research* 112 (5): 210–22. <https://doi.org/10.1016/j.jbusres.2020.02.033>

Harvard Health. 2020. "Blue Light Has a Dark Side." July 7, 2020. <https://www.health.harvard.edu/staying-healthy/blue-light-has-a-dark-side>.

Hattar, Marie. 2022. "Why Storytelling Wins in Marketing." Forbes, June 9, 2022. <https://www.forbes.com/sites/forbescommunicationscouncil/2022/06/09/why-storytelling-wins-in-marketing/>.

IOSR Journal of Business and Management (IOSR-JBM) ISSN: 2278-487X. Volume 5, Issue 6 (Nov. - Dec. 2012), PP 54-61 www.iosrjournals.org

Koscierzynski, Mark. (n.d.). "The Modern Consumer Decision making Journey." Deloitte. <https://www2.deloitte.com/content/dam/Deloitte/us/Documents/CMO/us-modern-consumer-decision-making-journey.pdf>

Limaye, Mohan. 1998. "Gale - Product Login." Galeapps.gale.com. November 1998. <https://go.gale.com/ps/i.do?p=AONE&u=googlescholar&id=GALE>

Lopes, David G, Nuno Mendonça, Ana Rita Henriques, Jaime Branco, Helena Canhão, and Ana Maria Rodrigues. 2023. "Trajectories and Determinants of Ageing in Portugal: Insights from EpiDoC, a Nationwide Population-Based Cohort." *BMC Public Health* 23 (1). <https://doi.org/10.1186/s12889-023-16370-8>

Lopes, David G., Nuno Mendonça, Ana Rita Henriques, Jaime Branco, Helena Canhão, and Ana Maria Rodrigues. 2023. "Trajectories and Determinants of Ageing in Portugal: Insights from EpiDoC, a Nationwide Population-Based Cohort." *BMC Public Health* 23 (1). <https://doi.org/10.1186/s12889-023-16370-8>.

Muzellec, Laurent, and Mary C. Lambkin. 2009. "Corporate Branding and Brand Architecture: A Conceptual Framework." *Marketing Theory* 9 (1): 39–54 [Corporate branding and brand architecture: a conceptual framework \(sagepub.com\)](https://doi.org/10.1186/s12889-023-16370-8)

Payne, Adrian, Pennie Frow, and Andreas Eggert. 2017. "The Customer Value Proposition: Evolution, Development, and Application in Marketing." *Journal of the Academy of Marketing Science* 45 (4): 467–89. <https://doi.org/10.1007/s11747-017-0523-z>

Picking, Alannah. 2023. "QR Codes in Digital Marketing." Sitecentre® (blog). September 8, 2023. <https://www.sitecentre.com.au/blog/qr-codes-in-digital-marketing>.

PwC. 2018. "Customer Experience Is Everything." PwC. <https://www.pwc.com/us/en/services/consulting/library/consumer-intelligence-series/future-of-customer-experience.html>.

Relic, Jelena. "15 Best Brand Awareness Strategies: The Ultimate Guide to Building a Brand." DesignRush, March 25, 2022. <https://www.designrush.com/agency/logo-branding/trends/best-brand-awareness-strategies>

Saigí-Rubió, Francesc, Israel Júnior Borges Do Nascimento, Noemí Robles, Keti Ivanovska, Che Katz, Natasha Azzopardi-Muscat, and David Novillo-Ortiz. 2022. "The Current Status of Telemedicine Technology Use across the World Health Organization European Region: An Overview of Systematic Reviews." *Journal of Medical Internet Research* 24 (10): e40877. <https://doi.org/10.2196/40877>.

Statista. (n.d.). "Spectacle Lenses: Market Data & Analysis." Statista. [Spectacle Lenses: market data & analysis | Statista](#)

Statista. n.d. "Esports - Portugal | Statista Market Forecast." <https://www.statista.com/outlook/amo/esports/portugal>.

Taylor, Mia. 2023. "Portugal's Travel and Tourism Industry Is on Target to Break Records in 2023." *TravelPulse*. July 14, 2023. <https://www.travelpulse.com/news/destinations/portugal-s-travel-and-tourism-industry-is-on-target-to-break-records-in-2023>.

Thomas, Jacquelyn S., Chaoqun Chen, and Dawn Iacobucci. 2022. "Email Marketing as a Tool for Strategic Persuasion." *Journal of Interactive Marketing* 57 (3): 377–92. <https://doi.org/10.1177/10949968221095552>.

United Nations. "Transforming our world: The 2030 agenda for sustainable development." *New York: United Nations, Department of Economic and Social Affairs* (2015). A/RES/70/1. https://www.un.org/ga/search/view_doc.asp?symbol=A/69/L.85&Lang=E

Wertz, Jia. n.d. "Online Marketing as We Know It Is Changing with the Rise of Generation Z." *Forbes*. <https://www.forbes.com/sites/jiawertz/2018/09/30/online-marketing-as-we-know-it-is-changing-with-the-rise-of-generation-z/?sh=1a9dd0b465ab>

ZEISS. 2020. "Zeiss Sustainability – Industrial Quality Solutions." ZEISS sustainability Industrial Quality Solutions. November 20, 2023. <https://www.zeiss.com/corporate/en/c/stories/insights/green-safe-responsible-for-greater-sustainability-in-eye-care.html>.

ZEISS. 2021. "Challenge the Limits of Imagination - Zeiss Vision Care." ZEISS. November 20, 2023. <https://www.zeiss.com/content/dam/media/Download/sustainability-report-2020-2021-en.pdf>.

ZEISS. 2022. "Sobre Carl ZEISS Vision." ZEISS. [Sobre Carl Zeiss Vision](#)

ZEISS. n.d. "About Us." ZEISS. <https://www.ZEISS.com/about-us>.

ZEISS. n.d. "Contactar a ZEISS Vision Care" ZEISS. <https://www.ZEISS.pt/vision-care/para-profissionais-da-visao/contacto.html>.

ZEISS. n.d. "History Eyeglass Lenses - How It All Began." ZEISS. [History \(ZEISS.com\) Eyeglass lenses - How it all began | ZEISS](#).

ZEISS. n.d. "Portrayal of ZEISS Vision Care." ZEISS. [Portrayal of ZEISS Vision Care](#)

ZEISS. n.d. "Serviço Y assistência." ZEISS. <https://www.ZEISS.pt/consumer-products/servico.html>.

ZEISS. n.d. "Suporte ao Cliente." ZEISS. <https://www.ZEISS.pt/metrologia/servicos-e-suporte/suporte-ao-cliente.html>.

ZEISS. n.d. "Sustainability and Economic Success in Harmony." ZEISS. [Sustainability and Economic Success in Harmony \(ZEISS.com\)](#)

ZEISS. n.d. "ZEISS Lentes Monofocais." ZEISS. [ZEISS Lentes monofocais](#)

ZEISS. n.d. "Educação E Formação Para Profissionais Da Visão Pela ZEISS." ZEISS. [Educação e formação para profissionais da visão pela ZEISS](#)

ZEISS. n.d. "HR." ZEISS. [HR \(ZEISS.com\)](#).

ZEISS. n.d. "Purchasing and Supplier Portal." ZEISS. [Purchasing and Supplier Portal | ZEISS](#)

ZEISS. n.d. "Suppliers." ZEISS. [ZEISS suppliers](#)

ZEISS. n.d. "ZEISS Future Technologies – Solutions for Tomorrow." ZEISS. [ZEISS future technologies – solutions for tomorrow](#)

ZEISS. n.d. "ZEISS Research & Technology – Always One Step Ahead." ZEISS. [ZEISS Research & Technology – Always one step ahead](#)

ZEISS. N.d. "Zeiss Sustainability – Industrial Quality Solutions." ZEISS sustainability – Industrial Quality Solutions. November 20, 2023. <https://www.zeiss.com/corporate/en/c/stories/insights/green-safe-responsible-for-greater-sustainability-in-eye-care.html>.

Zhang, Peng Vincent, Seoyoung Kim, and Anindita Chakravarty. 2023. "Influence of pull marketing actions on marketing action effectiveness of multichannel firms: A meta-analysis." *Journal of the Academy of Marketing Science* 51, no. 2: 310-333 [EconPapers:](#)

[Influence of pull marketing actions on marketing action effectiveness of multichannel firms: A meta-analysis \(repec.org\)](#)

7. Appendix

Appendix 1- ZEISS SmartLife Lenses



Appendix 2- Value Chain Analysis

The entire eyeglass Value Chain is served by the technological tools and goods developed and produced by ZEISS Vision Care. This involves creating, manufacturing, and distributing premium eyeglass lenses, diagnostic tools, and all-encompassing business solutions. Everything they do is focused on ensuring the long-term success of their clients and assisting people all over the world in having a clear understanding of the wonder and detail that surrounds them.

In ZEISS's value chain, it is essential to differentiate between non-brand value and brand value, all while carefully examining the pricing dynamics between eyewear lenses and the final glasses product. This distinction plays a pivotal role in understanding ZEISS's approach to the eyewear industry.

Non-Brand Value and Brand Value:

Non-Brand Value: This refers to the worth of the lenses themselves irrespective of the brand name or reputation. In the case of ZEISS, the non-brand value would revolve around the quality, functionality and features of their lenses. ZEISS is renowned for producing top-notch lenses with engineering, which greatly contributes to their brand value.

Brand Value: Brand value pertains to the worth that customers associate with lenses because of the brand's reputation, reliability and perceived excellence. ZEISS holds a brand value in the industry owing to its longstanding tradition of crafting premium optics. Customers are often willing to pay a premium for ZEISS-branded lenses due to the trust associated with this brand.

Price of Eyewear Lenses and Price of Final Glasses Product:

Price of Eyewear Lenses: ZEISS may offer lenses as products. Their pricing is determined by factors such as material costs, manufacturing processes, research and development expenses and competition. Generally regarded as premium products in nature ZEISS lenses may command prices in the market due to their brand value.

The cost of the glass product, which includes the ZEISS lenses will also encompass expenses associated with assembling, distributing, marketing, and providing any services. The profit margin, of the glass product, is influenced by these factors along, with competition and pricing tactics.

Primary Activities

Inbound Logistics

Inbound logistics are a critical component of ZEISS's supply chain, responsible for ensuring the seamless movement of materials, components, and supplies essential for its precision optics and imaging technology.

ZEISS relies on specific INCOTERM conditions to govern its inbound logistics. These conditions, represented by terms such as "EXW," "FCA," "FAS," and "FOB," determine the point at which responsibility and costs transition from the supplier to ZEISS. Suppliers must follow these INCOTERM conditions diligently. Here's a brief overview of what these terms entail:

EXW (Ex Works): Under this term, the supplier's responsibility ends when the goods are made available at their premises or another designated location. The buyer is accountable for all transportation, risks, and import duties from this point forward.

FCA (Free Carrier): This term entails the seller delivering the goods, cleared for export, to the carrier designated by the buyer at a specified location. The transfer of risk and responsibility occurs upon delivery to the carrier.

FAS (Free Alongside Ship): Primarily used for sea or inland waterway transport, FAS requires the seller to deliver the goods alongside the vessel at the named port of shipment. Risk and costs shift to the buyer once the goods are placed next to the ship.

FOB (Free On Board): Similar to FAS, FOB applies to sea and inland waterway transport. The seller's responsibility extends until the goods are placed on board the vessel at the named port of shipment. Subsequently, risk and costs transfer to the buyer.

In every case, suppliers should use the address provided by ZEISS on the individual order or any other relevant agreements for shipping documents.

ZEISS places a significant emphasis on suppliers' compliance with its inbound logistics specifications and guidelines. Failure to adhere to these guidelines can result in the issuance of invoices for any discrepancies, underscoring the importance of strict adherence to the outlined procedures.

For courier, express, or parcel services, ZEISS typically maintains a flat-rate transport insurance policy. Suppliers should be aware that, in most cases, they are not permitted to arrange additional insurance or increase the liability value of shipments unless explicitly directed to do so in the individual purchase order.

ZEISS has established specific criteria for the selection of service providers, encompassing both standard dispatch and express delivery services. The choice of service provider is determined by various factors, with a strong consideration of the destination region.

To facilitate efficient order processing, suppliers are instructed to include essential ZEISS references on shipping and freight documents. This includes ensuring that the ZEISS order number is linked to the corresponding Purchase Order (PO). In situations where a reference number is unavailable, suppliers should provide the name of the ZEISS contact person responsible for the specific order.

ZEISS offers comprehensive instructions for shipping goods via air and sea freight. These instructions encompass the selection of service providers, contact information, and specific requirements based on the destination and weight considerations. Strict adherence to these

instructions is vital for ensuring that logistics operations align with ZEISS's established standards.

ZEISS's commitment to precision and quality extends to its inbound logistics processes. Efficient and standardized inbound logistics procedures are vital for ensuring the seamless and cost-effective delivery of materials and components to ZEISS sites.

Operations

ZEISS's eyewear lenses manufacturing processes are a testament to the company's commitment to precision and quality. These operations are a vital component of their primary activities, ensuring that the lenses produced meet the high standards associated with the ZEISS brand.

ZEISS employs advanced manufacturing processes to create eyewear lenses that meet the highest standards of precision and quality. From the initial measurements at the optician's office to the final quality assurance checks, ZEISS's operations ensure that every lens meets its rigorous standards.

The lenses manufacturing process begins with a visit to the optician, where your prescription and unique vision profile are measured. A suitable lenses material, either plastic or glass, is selected. ZEISS utilizes freeform technology, a cutting-edge method developed by ZEISS, to create personalised precision lenses. This innovative approach sets ZEISS apart from traditional lenses manufacturing techniques.

The lenses production process involves nine essential steps, each meticulously executed to guarantee the lenses' quality and precision. These steps include preparation, blocking, generating, polishing, engraving, de-blocking, cleaning, tinting, coating, and quality assurance.

Each step is crucial in the lenses' journey from a semi-finished product to a polished, customized lenses.

ZEISS maintains strict quality assurance standards for every lens produced. Each lenses undergoes thorough visual and mechanical inspections to ensure it aligns with the necessary specifications. This unwavering commitment to quality distinguishes ZEISS in the eyewear industry.

Additionally, ZEISS's freeform technology allows for the incorporation of personal data to create lenses that precisely fit the wearer's needs and frames. This customization ensures optimal vision and wearer comfort, making ZEISS eyewear lenses a top choice for those seeking a tailored eyewear experience.

In summary, ZEISS's eyewear lenses manufacturing operations encompass precise measurements, advanced manufacturing techniques, and rigorous quality control to deliver personalised, high-quality lenses that meet the high standards associated with the ZEISS brand.

Outbound Logistics

Within the primary activities of ZEISS, the outbound logistics system, primarily represented by the VISUSTORE platform, plays a crucial role. This outbound logistics function focuses on the efficient delivery of ZEISS lenses to opticians and the management of related processes.

The outbound logistics at ZEISS, driven by the VISUSTORE system, is an integral part of order processing and fulfilment. Opticians use this platform to place their orders, which are then promptly validated in real-time. Validated orders move smoothly through the outbound logistics chain, ensuring that opticians receive their products efficiently.

VISUSTORE also contributes to effective inventory management. Opticians can easily place orders through the platform, and the system ensures that the required lenses types are available for delivery. This real-time inventory management is central to ZEISS's ability to meet customer demands promptly.

Moreover, ZEISS places significant emphasis on technology-driven solutions within its outbound logistics. VISUSTORE is a prime example of this. It provides opticians with a digital platform to efficiently place orders, reducing manual intervention and streamlining the logistics process.

Customization is a key feature of ZEISS's outbound logistics. VISUSTORE enables opticians to customize lenses according to their customer's specific needs. The platform also includes features for frame selection, ensuring that the final products are precisely tailored to individual requirements.

Quality control is another critical aspect of ZEISS's outbound logistics. VISUSTORE offers visual inspection tools, including a 3D view of lenses. Opticians can use these tools to verify that lenses meet exact specifications, such as frame compatibility and centration points.

Customer feedback is actively collected by ZEISS, primarily from opticians using the VISUSTORE system. This feedback loop plays a vital role in enhancing the platform and, by extension, ZEISS's outbound logistics operations.

Service

ZEISS extends a comprehensive range of post-sales support services for its various consumer products. However, it is important to note that ZEISS Vision Care, specifically for eyewear lenses, primarily relies on direct customer contact for service. In contrast, for other consumer

products offered by ZEISS, an extensive suite of services is available. These services include a Consumer Self-Service Portal, global repair services, product registration, a Download Centre, and an efficient process for ordering spare parts. This delineates the distinct approaches adopted for different product categories within ZEISS,

Support Activities

Procurement

In each of the markets where the Group competes, ZEISS wants to be at the top. Since suppliers are crucial to achieving this, ZEISS depends on high-performing and motivated suppliers to meet its objectives. When choosing suppliers, dependability, adaptability, and innovation are important considerations. Priority is always given to maintaining the exceptional quality of ZEISS products. ZEISS is responsible for its suppliers' financial management. In exchange, ZEISS provides its suppliers with long-term business partnerships that are strengthened via close collaboration and trustworthy partnerships.

The procurement process is essential to ZEISS' success when purchasing because of the substantial quantity of value created along the supply chain. Production and non-production commodities are sourced from domestic and foreign sources through regional purchasing agencies all around the world. Due to the variety of industry sectors, each business unit faces unique obstacles while attempting to obtain production supplies. For this reason, independent purchasing departments for each business unit often handle this task.

Additionally, they discuss the Procurement Interaction Portal (PIP), which is a tool used by current suppliers to document their services and manage paperwork when they get orders. A global network of more than 2,000 suppliers from 35 different countries is essential to the

success of the ZEISS Semiconductor Manufacturing Technology (SMT) division. Securing high-quality delivery on schedule and at reduced costs depends heavily on procurement. To guarantee maximum performance for consumers, ZEISS chooses suppliers based on strict standards. This emphasises how crucially important procurement is to the long-term success and competitiveness of ZEISS SMT.

Technology Development

The company is a leader in technology and its extremely inventive solutions advance technological development. Whether it is about technical materials, artificial intelligence, image sensors, micro structured optics, or holographic elements, all research is conducted on a global scale integrating numerous disciplines. In the end, this is the only way ZEISS can develop technologies that benefit the entire world. They can differentiate themselves by their High Tech Materials with conventional materials and eventually approach their limits. As a result, innovations are continuously needed to keep up with the demands of cutting-edge technology. ZEISS is influencing this trend by promoting innovative materials.

ZEISS places an emphasis on classical optics as well as additive optics, printed optics, integrated photonic systems, micro structured optics, and more. The business is a leader in modern optics and an innovator in technology. Also, on Optics and photonics, to address the three main concerns of sustainability, digitalization, and health, ZEISS is presently reshaping the future.

Withing the company ZEISS they have insights about digitalization, they go to AI, where algorithms, which are invisible but always present, control our lives. And frequently without our knowledge, like with voice control, facial recognition, or online buying, for instance. They

support the easing of life by being fed and trained with data, not just in daily life, but also in business. ZEISS uses artificial intelligence, a significant development in digitalization and important technology, in many different industries. It aids in the evaluation of extraordinarily huge data sets, from microscope analysis to quality control in additive manufacturing. IOT is one of the biggest transformations of our day the digital transformation, which is made possible by the networked machines of Industry 4.0. To help its clients stay one step ahead of the competition, ZEISS regularly develops new solutions. Through their closeness to university research, start-ups, and partners, the ZEISS innovation centres build an ecosystem that links ZEISS with students, researchers, and businesses. This generates a force that sharply quickens the conversion of concepts into innovations. And lastly AR, the use of augmented reality in the digital realm has grown ubiquitous. It facilitates cross-border services, connects individuals, and eliminates travel. The digitalization plan at ZEISS includes augmented reality technology as a key component.

Human Resources Management

ZEISS says that its success depends on its workers. Team is one of the four pillars of the ZEISS Agenda 2020 because of a new invention in HR that will improve the level of teamwork and consequently, the HR department has become more dynamic because of it. The development of international standards for HR procedures and the introduction of the HR software Workday across the entire Group are crucial steps in this process. Now, employees can quickly and simply do basic HR tasks in the system or have them triggered by a workflow, such as updating their personal information or requesting time off. Based on standardized, efficient HR procedures, this will be done. “We have included colleagues from the HR departments of all segments and regions in our comprehensive approach. Together, we looked at HR business

processes and identified areas where there is room for improvement,” says Franz Donner, Head of Corporate Human Resources. All business segments and units' HR administration will be combined into one umbrella area called HR Business Services. This department will be in charge of handling a variety of daily responsibilities related to HR. Additionally, it will reduce the operational HR strain for HR Business Managers, freeing them up to give managers in the business units strategic support on issues related to people and leadership. The goal is to implement a cutting-edge HR strategy at ZEISS that will help all workers, managers, and the business as a whole. Digitalization and the standardization of HR administrative operations are the two main changes. The emphasis will then shift to strategic HR procedures including hiring, remuneration, talent and performance management, and extra services.

Leading cloud-based HR platform Workday will support ZEISS in its efforts to digitize its HR services. It not only provides all employees with cutting-edge, simple-to-use self-services and enables them to make more insight-driven decisions, but it also creates uniform standards for HR across all ZEISS sites in the world.

ZEISS also provides training for eye care professionals in Portugal and other countries, allowing them to obtain specialized instruction in digital marketing that is specifically tailored to their needs. They focus on relevant marketing tools and identify the right touchpoints to use to increase foot traffic, boost sales, and gain a deeper understanding of what customers want. They are aware of the importance of digital strategies and therefore the impact it has on opticians that are the ones that sell their products.

Firm's Infrastructure

Finally, regarding the Firm's Infrastructure, in comparison to the fiscal year-end 2020/21 (previous year: 5.494 billion euros), group equity increased by 30.6% to 7.173 billion euros, resulting in an equity ratio of 55% (previous year: 52%).

The ZEISS Group is counting on its innovative strength to propel it forward and maintain its rapid growth trajectory. At almost 13% of turnover, research & development expenditures grew to 1,151 million euros (previous year: 943 million euros). More than 5,200 workers at ZEISS Group R&D divisions are focused on enhancing the business's capacity for innovation. The number of patents, which as of the reporting date amounted to approximately 10,500 worldwide, reflects this. The Americas and EMEA regions both saw increases in sales, but the APAC region saw the most revenue rise (+22%). As a result, every region is still growing well and has once again helped ZEISS develop positively.

"One of the factors behind our success is our focused investment strategy. The continuing high level of expenditure on research and development, which amounts to 13% of revenue, is our investment in the future - at 1,151 million euros, it has reached a new high," said Dr. Christian Müller, CFO of Carl ZEISS AG. "Sustainability plays a major role for us. A commitment to the common good and to finding solutions for key societal issues are part and parcel of our ethos," added Müller.

Apart from its substantial investment in R&D, ZEISS is also focusing on expanding its infrastructure, not only at its home site in Oberkochen but also in Jena, Wetzlar, Dresden, and other locations in Germany and abroad, such as India. As a result, the business is adapting to the faster expansion. Through research, production, and development capabilities, the

deliberate augmentation of infrastructure will ensure the sustained competitive and inventive advantage.

ZEISS employed 38,770 people worldwide as of September 30, 2022 (compared to 35,375 the previous year). As a result, headcount rose by 10% from September 30, 2021, to that date.

Appendix 3 - Industry Insights

Industry Analysis

To address ZEISS Vision Care's branding and communication challenge effectively, we will comprehensively analyse the approach taken from another company in the eyecare industry. The objective is to benchmark the strategies and solutions, providing ZEISS with valuable references for improving their practices. The company chosen, Felix Grey One, operates within the ZEISS industry, offering insights into best practices from a similar context. By examining the approaches and the paths that lead this company to success, we aim to equip ZEISS with a set of references that can inform and inspire their branding and communication strategies.

Inside Industry Practice

Felix Gray Blue Light Glasses: a benchmark example

Felix Gray is a company that offers a range of blue light glasses and computer glasses that can help protect your eyes from the harmful effects of blue light. The company faced a branding and communication problem in the past. They needed to inform consumer audiences about the importance of Blue Light filtering and glare-eliminating lenses. To solve this problem, Felix Gray hired Diffusion as its public relations agency of record. Diffusion's campaign supported upcoming product launches from the eyewear brand while establishing Felix Gray as a leader who not only understands industry and consumer trends but sets them. The campaign utilized

creative thought leadership activations to build awareness around the detriments of exposure to Blue Light and glare from digital screens leading to eye strain, sleep deprivation, and headaches. Diffusion simultaneously sustained an active thought leadership campaign that positioned Felix Gray as a serious e-commerce innovator as direct-to-consumer brands continue to gain market share against industry incumbents.

Getting inspiration from Felix Gray's successful branding and communication strategies, there are valuable lessons that ZEISS Vision Care can apply to enhance its own branding and communication efforts. The following key takeaways outline how ZEISS can effectively address its challenges and create a lasting impact on its audience:

- **Addressing Consumer Pain Points:** Just as Felix Gray effectively addressed the pain points related to digital eye strain, sleep deprivation, and headaches caused by excessive screen time, ZEISS can focus on solutions that directly alleviate these common consumer issues through their lenses technology.
- **Educational Content:** Felix Gray educated consumers about the problems associated with blue light exposure and glare. ZEISS can similarly create informative content that helps consumers understand the science and benefits of their lenses technology, ultimately offering solutions to their vision-related concerns.
- **Thought Leadership:** Emulating Felix Gray's approach, ZEISS can establish itself as a thought leader in the vision care industry. By actively participating in discussions, sharing insights, and driving innovation in the field, ZEISS can build consumer trust and credibility.
- **Product Innovation and Benefits:** Just as Felix Gray emphasised the benefits of their lenses, ZEISS can highlight the unique features of their products, such as superior

clarity, comfort, and eye protection, to offer consumers a compelling reason to choose their vision care solutions.

- **Sustainability:** Using Felix Gray's cue, ZEISS can emphasise its commitment to sustainability, such as using eco-friendly materials in its lenses production. This approach not only appeals to environmentally conscious consumers but also showcases responsibility in manufacturing.
- **Direct-to-Consumer Approach:** ZEISS can leverage the direct-to-consumer trend, making it more convenient for customers to access their products and services. This strategy could also emphasise the value and quality of buying directly from ZEISS.

In summary, by adopting these strategies inspired by Felix Gray, ZEISS Vision Care can effectively address its challenges, educate consumers, and provide solutions to common pain points while enhancing its brand image and loyalty.

Appendix 4- Survey Questions

Disclaimer: Depending on the options the respondent chooses, this survey's questions may change. The questions that follow or the content that is offered may be modified to reflect the questionnaire's ability to handle a range of answers.

1. "Gender - What is your gender?"

- Female

- Male

- Other

2. "Age - How old are you?"

- 16-25

- 26-40

- 41-55

- 56-65

- 66 or older

3. "Education - What is the highest level of education you have completed?"

- Less than High School

- High School

- Bachelor's degree

- Master's degree

- Doctoral Degree

- Other

4. "Current Occupation - What is your current occupation?"

- High School Student

- University Student

- Employed

- Self-employed / Freelancer

- Unemployed

- Retired

5. "Household Size - How many people live in your household?"

- 1

- 2

- 3

- 4

- 5

- 6 or more
6. "Household Income - What is your average monthly household income (after taxes are deducted)?"
- Less than 500€
 - 500€ - 1000€
 - 1000€ - 1500€
 - 1500€ - 2000€
 - 2000€ - 2500€
 - 2500€ - 3000€
 - 3000€ - 3500€
 - 3500€ - 4000€
 - More than 4000€
 - Prefer not to say
7. "Nationality - What is your nationality?"
- [A list of countries is provided]
8. "Residence - Where have you been living over the past five years?"
- [A list of countries is provided]
9. "Prescription Glasses - Do you wear prescription eyeglasses?"
- Yes
 - No
10. "Buyer - Were you the one who made the purchase of prescription eyeglasses?"
- Yes
 - No

11. "Optometrist Influence - To what extent does your optometrist's recommendation impact your selection of eyeglass lenses?"

- Not at all
- Barely
- Somewhat
- Moderately
- Quite
- Highly
- Extremely

12. "Willingness to Pay - What is your willingness to pay for one pair of ophthalmic lenses (without frames)?"

- [Range data provided]

13. "Overall Willingness - How much would you be willing to pay for a complete pair of eyeglasses with frames included?"

- [Range data provided]

14. "Familiar Brands - On a scale from 1 (not at all) to 7 (very much) what is your level of familiarity with the following brands?"

- Not at all
- Barely
- Somewhat
- Moderately
- Quite
- Highly
- Extremely

- Brands: ZEISS, Essilor, Other (please specify)

15. "Influence - During your purchasing decision have you been influenced by any particular lenses' brand recall?"

- Yes

- No

16. "Brand Choice - Which brand?"

- ZEISS

- Essilor

- Other (please specify)

- I do not know

17. "Method - What type of marketing influenced your decision?"

- Television

- Social media

- Influencer endorsements

- E-mail marketing

- Word of Mouth

- Other (please specify)

- None

18. "Advertising Recall - Do you recall seeing any advertising from an eyewear brand or store?"

- Yes (please specify)

- No

19. "ZEISS - Do you wear ZEISS lenses?"

- Yes

- No

- I do not know

20. "Motivation - Why?"

- Lenses quality

- Value for money

- Brand reputation

- Recommendations from optometrists / eye care professionals

- Word of mouth (specify: friends family or other)

- Trust

- Technology and innovation

- Other (please specify)

21. "Why Not? - If you haven't purchased ZEISS lenses could you share why not?"

- Unavailability at store

- Quality concerns

- Above budget

- Brand preference

- Recommendation for another brand by an eye care professional

- Previous issues

- Other (please specify)

22. "Country of Origin - Do you know the country of origin from the ZEISS company?"

-Yes (please specify)

- No

23. "Brand Choice - Which brand do you select when choosing lenses?"

- Essilor

- Other (please specify)

24. "Brand Choice - Please let us know why you choose this brand (you may select more than one option)"

- Lens quality

- Value for money

- Brand reputation

- Recommendations from optometrists or eye care professionals

- Word of mouth (specify: friends family or other)

- Trust

- Technology

- Other (please specify)

25. "Feelings - How does wearing ZEISS lenses make you feel?"

- Not Proud:Proud (Bipolar Scale)

- Not Loyal:Loyal (Bipolar Scale)

- Not Empowered:Empowered (Bipolar Scale)

26. "Trust - Please rate your level of agreement with the following statements on a scale from 1 (strongly disagree) to 7 (strongly agree)"

- I trust ZEISS.

- ZEISS delivers what it promises.

- I would recommend ZEISS to other people.

- I would repurchase ZEISS

27. "Brand Affect/Image - Please indicate your level of agreement with the following statements for ZEISS brand".

- My opinion of this brand is favorable
- My opinion of this brand is good
- My opinion of this brand is positive
- This brand is harmful
- This brand is trendy
- This brand is conscious
- This brand is convenient
- This brand is purposeful

Appendix 5 – In-store interviews with optometrists

- **Optometrist's Background:** Ask the optometrist to briefly introduce themselves, including their qualifications and experience.

Part 1: Understanding the Consumer Journey

- **Customer In-Store Journey:** Describe the typical journey consumers go through when they visit your store. Do some customers already have their prescriptions, and have they been influenced before they arrive?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

Within the realm of customer preferences, two distinct types emerge. The first group arrives with a pre-established brand preference, often shaped by recommendations from friends or personal research. On the contrary, the second group lacks any specific brand awareness. A

predominant pattern involves customers presenting prescriptions specifying lenses types rather than brand names, for example, lenses tailored for clear near vision or lenses for optimal distance viewing.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

Our customers often come with a prescription, but a significant number also depend on our in-store optometry services. Some are influenced by recommendations from family and friends. The journey usually starts with a consultation, followed by a vision test, and then lenses and frame selection.

- Common Consumer Concerns: What are the most frequent concerns that consumers express regarding their eye health and vision when visiting your practice? What specific questions do they ask during the appointments? Please provide examples if possible.

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

When delving into consumer concerns, a recurring theme is the pursuit of quality lenses. Frequently, customers inquire about renowned brands like Essilor or ZEISS, reflecting a strong inclination towards trusted names in the optical industry.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

A large proportion of our visitors (around 60%), especially in the 20-40 age group, suffer from myopia. They frequently ask about the latest treatments and lenses technologies to manage their condition.

- Digital Platforms Impact: What is the impact of digital platforms on consumer decisions? How do online reviews, social media, and digital marketing influence their choices?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

Two noteworthy trends have surfaced. Firstly, there is a significant shift from a time when a substantial portion of the population didn't require glasses due to an inability to read. This change is linked to the evolution in literacy, where previously, a considerable number of individuals could not read, and now, almost everyone knows. Secondly, the motivation for wearing glasses has expanded beyond mere vision correction to include mitigating headaches or preventing visual strain, even in cases where individuals possess adequate vision.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

Nowadays the impact can be seen, people are more aware of brands and technologies.

- Lenses Brand Awareness: Are consumers generally aware of different lenses brands, and do they inquire about specific brands? If so, which brands are most commonly mentioned or requested? For what reason are they mentioned?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

Within the consumer landscape, the names Essilor and ZEISS often surface in conversations, indicating a certain level of brand awareness. While not universally pervasive, the mention of these brands implies a noteworthy presence in the minds of consumers navigating the lenses selection process.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

Consumers recognise brands like Essilor and ZEISS due to their long-standing market presence and history, we often introduce them to Hoya lenses, a Japanese brand which offer advanced features and benefits.

- Vision Needs: What are the most common vision problems or needs that you encounter among consumers (e.g., nearsightedness, farsightedness, astigmatism, presbyopia)?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

The array of vision needs encountered at MultiOpticas of Oeiras is remarkably diverse, encompassing a spectrum of visual impairments. From nearsightedness to farsightedness, astigmatism, and presbyopia, the clientele presents a comprehensive range of vision-related requirements.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

Myopia. We're seeing an increase in young adults with myopia, likely due to lifestyle changes, including increased screen time.

Part 2: Elements that Influence Consumer Decisions

- Preferred Lenses Features: In your experience, what features or benefits do consumers typically look for when choosing lenses (e.g., durability, clarity, UV protection, anti-glare coatings, blue light protection)?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

In the process of selecting lenses, consumers express a keen interest in features that cater to a diverse set of needs. The focal point lies in customizing solutions to individual concerns. A pivotal aspect of the practice involves attentive listening to the customer's specific requirements. These needs are then carefully aligned with a range of features, encompassing attributes such as durability, clarity, UV protection, anti-glare coatings, and blue light protection. This approach ensures a tailored and comprehensive response to each customer's unique preferences and visual demands.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

When choosing lenses, consumers prioritise price and quality mostly. They also look for specific features, demand for blue light protection is increasing.

• Investment Decisions: In terms of pricing, what is the typical willingness of consumers to pay for lenses? Do they often have insurance, and is the presence of a guarantee an influencing factor?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

The financial aspect of lenses selection varies, with progressive lenses ranging from 270 to 900 euros and lenses for specific purposes, such as seeing up close or far, priced between 90 and 300 euros. Interestingly, customers are open to a mix of options, opting for both affordable and higher-end lenses.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

Consumer willingness to invest in lenses varies widely, with our products ranging from €75 to €1500. While some customers have insurance coverage, the presence of a guarantee is expected and important.

• Sustainability Initiatives: Do you have any sustainability initiatives in place, such as a program where customers can return used lenses for a discount? Is this program provided by the store or the brand, and do consumers respond positively to it?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

MultiOpticas has initiated a sustainability program encouraging customers to return old lenses for recycling. The positive response from consumers indicates a growing sensitivity to

environmental concerns. This aligns with a broader trend of consumers becoming more conscious of the ecological impact of their choices.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

Currently, we do not have any initiative like a return program for used lenses. However, there is growing consumer interest in sustainable practices in the eyewear industry.

- Recent Trends: Have you noticed any recent trends in consumer behaviour related to eye care, lenses, or eyewear? If so, please provide some insights into these trends.

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

Two noteworthy trends have surfaced. Firstly, there is a significant shift from a time when a substantial portion of the population didn't require glasses due to an inability to read. This change is linked to the evolution in literacy, where previously, a considerable number of individuals could not read, and now, almost everyone knows. Secondly, the motivation for wearing glasses has expanded beyond mere vision correction to include mitigating headaches or preventing visual strain, even in cases where individuals possess adequate vision.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

We've noticed an increasing demand for blue light filtering lenses due to increased screen time.

- Campaign Suggestions: Based on your understanding of consumer concerns and interests, what suggestions do you have for our communication campaign to effectively address these concerns and interests?

Optometrist of ZEISS Seller store: (MultiOpticas Oeiras)

When considering a communication campaign, the optometrist recommends steering away from school-based initiatives due to intricate regulations. Instead, the focus should be on office-based campaigns, capitalizing on the more direct feedback loop and the prevalent need for eyewear solutions in professional environments.

Optometrist of a store that does not sell ZEISS: (Optica Morais Soares)

For communication campaigns, focusing on educating consumers about the impact of digital screens on eye health and promoting lenses with blue light filtering technology would be effective.

Appendix 6- Pop-up Stations



Appendix 7- Summary table of Pop-up stations initiative

| University Pop-up Stations | | | |
|---|---|---|---|
| Touch Points | University common areas, ZEISS VR OnePlus headset experiences, eyewear displays, educational segments on blue light, digital games, social media hashtag interaction, eye yoga relaxation zone, engagement with opticians | | |
| Benchmarking | — | | |
| Briefing | Target Group | University students | |
| | Message | Join the Vision Revolution with ZEISS | |
| | Objectives | Brand awareness, education on eye health, product trials | |
| | Operationalisation | Setup interactive stations in central university areas, staffed with knowledgeable ZEISS representatives. Equip stations with VR headsets for immersive educational experiences, a selection of stylish frames, and informative displays on blue light filtering. Implement a system for live social media sharing with incentives for participation. Include interactive quizzes and digital games that highlight lens technology. Organize eye yoga sessions to emphasise eye health. Plan for seamless assembly and disassembly logistics, team training, and incorporate feedback mechanisms for continuous improvement | |
| | Activate actions | Coordinate with universities, set up VR and educational stations, implement social media engagement, organize interactive activities, and provide educational relaxation zones | |
| Performance Indicators (Evaluation and Control) | | | |
| KPI | KPD | Control mechanisms | Evaluation Timing |
| Event attendance | No. of students participating in VR experiences & educational activities | Track registration & headcounts | End of each event day and at the campaign's conclusion |
| Social media engagement | No. of posts with #REVOLUÇÃOZEISS | Track hashtag usage, shares & mentions | Weekly monitoring and a comprehensive review at the end |
| Timeline | Sept-Nov: Launch in September (academic year start), weekly station rotations at universities; Mid-October review, adjustments; November (pre-exams) final evaluations and wrap-up | | |
| Budget | Location costs, setup of pop-up stations, VR headsets, prizes, logistics, staff, promotional materials | | |

Appendix 8- Online Vision Screening



Appendix 9- Summary table of QR code initiative

| Online Vision Screening through QR code | | | |
|---|--|--|---|
| Touch Points | Public transit ads, social media story ads, urban billboards, QR code scans, digital redirects | | |
| Benchmarking | — | | |
| Briefing | Target Group | Urban commuters and digitally engaged adults (20-40) | |
| | Message | When was the last time you had a vision test? | |
| | Objectives | Boost eye health awareness, enhance engagement with ZEISS online screening tool, create leads for ZEISS opticians, strengthen brand recognition | |
| | Operationalisation | Implement QR code ads in high-traffic areas and on social media channels (Facebook, TikTok & Instagram story ads) leading to ZEISS online vision screening test that after finishing connects to nearest ZEISS opticians. Monitor and adjust ad placements for optimal engagement. | |
| Activate actions | Launch the targeted campaign featuring QR codes in subway stations and on social media platforms. Monitor and optimise ad placements for maximum visibility and engagement. Coordinate with ZEISS opticians for seamless user transition from online screening to in-person consultations. | | |
| Performance Indicators (Evaluation and Control) | | | |
| KPI | KPD | Control mechanisms | Evaluation Timing |
| QR code scans | Number of QR code scans | Track and analyse QR code scan data through an analytics platform. | Monthly analysis of scan data to evaluate campaign reach and effectiveness |
| Online Vision Test Completions | Percentage of users completing the online vision test after scanning the QR code | Monitor completion rates of the online vision test; identify drop-off points | Bi-monthly assessment of completion rates to gauge user engagement and identify areas for improvement |
| Timeline | Apr-May: Launch ads in high-traffic urban areas. May-Jun: Target social media ads. Jul-Aug: Sustain visibility on social media and periodic updates to outdoor ads. Sep: Final campaign evaluation | | |
| Budget | ad design, digital platform placements, analysis tools, outdoor ad spaces rental, and social media management costs | | |

Appendix 10- Campaign Video Ad Scripts: "ZEISS: Clear Vision for Visionary Minds"



VIDEO AD:

Setting:

The bustling streets of Lisbon, interspersed with scenes from a picturesque schoolyard.

Opening Scene:

The video opens with João, a bright-eyed, curious 9-year-old boy, struggling to see the blackboard in his classroom. His expressions shift from frustration to sadness as he squints, trying to make out the writings. His classmates' laughter fills the background, creating a contrast to his silent struggle.

Transition:

Cut to João's life outside school. He is seen holding back from playing football with his friends, hesitant and unsure due to his blurred vision. The vibrant colours of Lisbon's streets contrast starkly with João's blurred perspective.

Scene 1: Discovery of Myopia

João's concerned mother takes him to an optometrist, where he is diagnosed with myopia. The optometrist explains to João and his mother about ZEISS MyoCare lenses and how they can help slow down the progression of his myopia and provide clear vision.

Scene 2: The Transformation

João receives his new glasses with ZEISS MyoCare lenses. The moment he puts them on, the camera focuses on his amazed expression. The once blurry world is now clear and vivid.

Scene 3: Rediscovering the World

A montage shows João excelling in school, confidently participating in class. His joy is evident as he clearly sees the blackboard and interacts with his peers.

Returning to the football scene, João is now playing energetically with his friends, his confidence restored. His accurate kicks and joyful laughter fill the screen.

Scene 4: Emotional Connection

João's mother watches him with tearful eyes filled with relief and happiness. She sees her son thriving, his world no longer limited by poor vision.

Closing Scene:

João looks directly into the camera, his eyes clear and bright behind his ZEISS MyoCare lenses. He smiles, a symbol of his newfound confidence and joy.

Tagline: The ZEISS logo appears with the tagline- "ZEISS Vision Care- For a brighter future"

Call to action: "For your child's brighter future, discover ZEISS at your nearest optician."

Ad summary:

The ad aims to resonate emotionally with parents by depicting a relatable story of a child's struggle with myopia and the transformative impact of ZEISS MyoCare lenses. The blend of emotional storytelling with the vibrancy of Portuguese culture aims to create a powerful narrative that highlights the importance of vision care in children's lives.

Appendix 11- Summary table of Storytelling video ad initiatives

| Clear vision for visionary minds (ZEISS MYOCARE) & Game On (ZEISS BlueGuard) | | | |
|--|--|--|---|
| Touch Points | Outdoor billboards, social media video ads (Instagram, TikTok & YouTube) | | |
| Benchmarking | Essilor Stellest campaign & Essilor BlueUV campaign | | |
| Briefing | Target Group | Parents and guardians of school-aged children (30-45); Gamers & young adults (18-30) | |
| | Message | Enhance your child's learning and life with ZEISS MyoCare lenses; Enhance your gaming experience and protect your eyes with ZEISS BlueGuard lenses | |
| | Objectives | Increase awareness about the importance of proactive vision care for children, and position ZEISS MyoCare lenses as a leading solution for managing childhood myopia effectively; Raise awareness among gamers about ZEISS BlueGuard lenses for eye strain prevention and position ZEISS as a leader in vision care solutions tailored for digital lifestyles | |
| | Operationalisation | Utilise compelling visuals in outdoor ads and emotional storytelling narratives in online video ads. The outdoor ads will showcase impactful imagery of a child using ZEISS MyoCare lenses, while the online ads will narrate a child's improved life experiences post vision correction. Implementation of tracking mechanisms. Regular analysis and adjustment based on engagement metrics | |
| | Activate actions | Produce an emotionally resonant video showcasing the transformative impact of ZEISS MyoCare lenses on children's vision and ZEISS BlueGuard on gamers. Distribute the video across social media platforms, complemented by eye-catching outdoor ads near schools and residential areas | |
| Performance Indicators (Evaluation and Control) | | | |
| KPI | KPD | Control mechanisms | Evaluation Timing |
| Engagement rate | Percentage of audience interactions per video view | Social media analytics for tracking likes, shares, comments, and view duration | Monthly during the campaign and a final evaluation at the campaign's conclusion |
| Conversion rate | Percentage of viewers who visit ZEISS website after watching the ad | Web analytics for tracking referrals from social media ads | Bi-monthly analysis and end-of-campaign comprehensive review |
| Timeline | April-May: Script, storyboard, and video production. August: Campaign launch. September-November: Engagement tracking and evaluation | | |
| Budget | video production costs, outdoor ad placements, digital ad expenses, monitoring & analytics tools | | |

Appendix 12- Campaign Video Ad Scripts: "Game On with ZEISS BlueGuard"



VIDEO AD:

Opening Scene:

A dimly lit room with vibrant screens. The camera zooms in on a young gamer, Miguel, intensely focused on an e-sports match. The glare from the screen reflects in his eyes.

Scene 1: The Challenge

Close-up of Miguel's eyes, showing signs of strain and fatigue. He blinks rapidly, trying to maintain focus.

Narrator: "In the heat of the game, every detail counts. But at what cost to your eyes?"

Scene 2: The Revelation

Miguel's friend, also a gamer, notices his discomfort and hands him a pair of glasses with ZEISS BlueGuard.

Narrator: "Discover the power of ZEISS BlueGuard. Designed for gamers, crafted for champions."

Scene 3: Transformation

Miguel puts on the ZEISS BlueGuard. The screen's glare softens; his eyes visibly relax.

Cut to gameplay footage showing enhanced clarity and contrast through the lenses.

Scene 4: Victory

Miguel is now playing effortlessly, his reactions sharp and precise. He wins the match, his team celebrates.

Narrator: "Stay sharp. Game longer. ZEISS BlueGuard keeps you in the game."

Closing Scene:

Miguel, relaxed and triumphant, turns to the camera with a confident smile. The ZEISS logo and the BlueGuard appear on screen.

Tagline: "Game On with ZEISS BlueGuard."

Final Shot: A quick collage of gamers across Portugal, each wearing ZEISS BlueGuard, fully immersed and excelling in their gaming worlds.

Call to action: "Join the ZEISS Gaming Revolution, Visit your nearest ZEISS optician".

Ad Summary:

This ad tells the story of Miguel, an e-sports gamer who discovers the benefits of ZEISS BlueGuard in enhancing his gaming experience and protecting his eyes. It emphasises the lenses' ability to reduce strain, improve focus, and extend gaming sessions, appealing to the competitive spirit of gamers. The emotional resonance comes from the transformation and triumph that ZEISS BlueGuard facilitates, connecting the product directly to the gamers' passion and performance.

Appendix 13- Campaign Video Ad Scripts: "ZEISS: The Vision of Excellence"



VIDEO AD:

Opening Scene:

Aerial shots of Lisbon's bustling business district at dawn, transitioning to close-ups of various high-class professionals waking up to start their day.

Scene 1: The Pursuit of Perfection

A series of scenes showcasing professionals in different fields- a lawyer reviewing a case, an architect examining blueprints, a surgeon in an operation room, an artist in a studio. Each professional is wearing stylish ZEISS eyeglasses, emphasising clarity and precision in their work.

Narrator: "In the pursuit of excellence, every detail matters. ZEISS lenses bring the world into sharper focus."

Scene 2: The Balance of Work and Life

The same professionals are seen enjoying their personal time - the lawyer playing chess in a park, the architect visiting a gallery, the surgeon enjoying a family dinner, the artist capturing the beauty of a Portuguese sunset.

The glasses remain a constant, subtly highlighting their importance in both work and leisure.

Narrator: "ZEISS isn't just about enhancing your work. It is about enriching your life."

Scene 3: The Emotional Connection

A sequence of moments where each professional achieves a milestone- winning a case, unveiling a design, successfully completing surgery, showcasing an artwork. Their expressions of triumph and satisfaction are made clearer through their ZEISS lenses.

Narrator: "With ZEISS, every victory, big or small, is seen with unparalleled clarity."

Closing Scene:

The professionals gather at an elegant evening event, sharing experiences and insights.

The camera focuses on their glasses, reflecting the ambient lights, symbolizing clarity and quality.

Tagline: "ZEISS- For those who see beyond."

(The ZEISS logo appears against a backdrop of the iconic Lisbon skyline at night.)

Call to Action: "Rediscover the world through ZEISS; Visit your nearest ZEISS optician."

Ad Summary:

This ad aims to connect emotionally with high-class professionals in Portugal, portraying ZEISS eyewear as an integral part of their pursuit of excellence in both their professional and personal lives. The ad highlights how ZEISS lenses are not just tools for better vision but are also companions in achieving life's milestones. The overall tone is aspirational, sophisticated, and emotionally resonant.

Appendix 14- Campaign Video Ad Scripts: "ZEISS: Seeing Through Time"



VIDEO AD:

Opening Scene:

In black and white, a child, Pedro, watches the moon landing on television, wide-eyed and filled with wonder.

Narrator (soft, nostalgic tone): "1969, a young boy named Pedro watched as history was written, far above in the stars, through the lenses of ZEISS."

Transition to Color and Present Day:

Color seeps into the frame as the scene shifts to present-day Pedro, now older, looking at the same moon through a telescope with his granddaughter, Sofia.

Scene 1: Legacy of Wonder

Pedro shares stories of the moon landing with Sofia. His eyesight is weak; he struggles to see the moon clearly.

Narrator: "Years have passed, but the wonder remains. The same moon, the same awe. But time changes our vision."

Scene 2: A Gift of Clarity

For his birthday, Sofia gifts Pedro a pair of ZEISS eyeglasses.

Narrator: "A gift from Sofia changes everything. With ZEISS, every detail of the moon comes back to life, just like that historic night."

Scene 3: Rediscovery

Pedro is now outdoors, wearing his ZEISS eyeglasses. Every aspect of his world is vivid and clear. He sees the beauty of the Portuguese landscape as if for the first time.

Narrator: "From the craters of the moon to the shores of Portugal, Pedro sees the world anew, through ZEISS lenses."

Scene 4: Emotional Connection

Pedro and Sofia are seen enjoying simple moments together- reading, exploring nature, sharing stories, all with the enhanced vision provided by ZEISS.

Narrator: "ZEISS does not just bring clarity to sight; it brings generations together, turning moments into cherished memories."

Closing Scene: The ZEISS Promise

Pedro, looking at the moon with Sofia by his side, smiles contentedly. The ZEISS logo appears.

Tagline: "ZEISS Vision Care: For Moments that Matter."

Final Scene:

The scene fades to a starry night sky, with a message of invitation.

Call to action: "Experience the world in its true beauty; Discover ZEISS at your nearest optician."

Ad Summary:

This ad tells the emotional story of Pedro, connecting his childhood memory of the moon landing to his present-day experience with his granddaughter. It highlights the enduring wonder

of exploration and discovery, symbolised by the moon and brought into sharp focus by ZEISS eyeglasses. The ad aims to evoke feelings of nostalgia, warmth, and the continuity of experiences across generations, underscoring the impact of clear vision on life's precious moments.

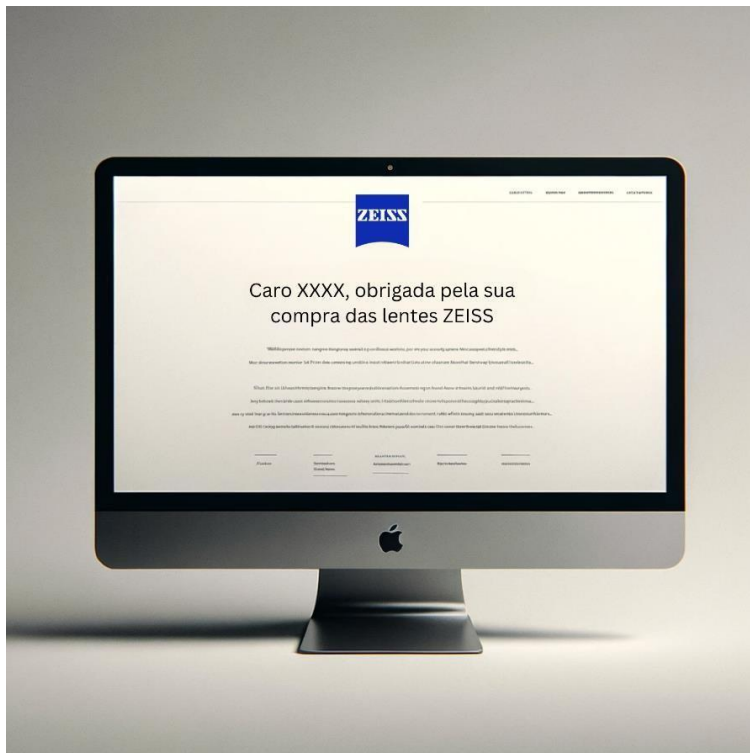
Appendix 15- Personalised Engraving



Appendix 16- Trade-In program and Sustainability



Appendix 17- E-mail Marketing Communications



Appendix 18- ZEISS as Sustainability Partner at Moda Lisboa Fashion Week



Appendix 19- ZEISS Visionary Explorers

