Agape
The UK Bridal Wear Market
ACKNOWLEDGEMENTS

This report is a diploma project for students at Leeds Metropolitan University, in addition to being a commercial report for Agape.

Firstly, we wish to thank our supervisor, Mr. Lawrence F. Bailey, for great support during the process of compiling this report.

Secondly, we would like to express our gratitude towards Agape, and our contact person Terje Tobiassen. Thank you for all your support and for giving us this interesting and challenging opportunity.

Finally we would like to thank The Independent Fieldwork Company Ltd through Rebecca Peck, and Miles Werrett, for their contributions to the project.

Leeds Metropolitan University
19th May 2008

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EXECUTIVE SUMMARY

Agape is a company from Stavanger, Norway. It specialises in wedding gowns, but also offers gowns for other purposes. Agape has stores in 5 Norwegian cities, with Sweden, Denmark and Finland as the likely immediate target countries for expansion. In the long term, Agape wishes to expand its business into the UK. The UK bridal wear market value grew by 23% between 2002 and 2007 reaching an estimated £124 million.

The aim of this project is to explore how Agape should proceed in entering the UK market. Qualitative research was conducted in order to obtain necessary primary data, in form of focus groups. Also, secondary data was provided mainly from Mintel Reports. Relevant theory are explained and applied in accordance to Agape’s situation.

Research shows that the traditional wedding gown segment accounted for 89% of the volume and 97% of the value of the bridal wear market in 2007, and is more common among young, affluent brides. Press is the main advertising channel with bridal magazines being the most important. Primary research indicates that the quality, the detail of the gown and the fabric are the most important factors when purchasing a wedding gown, as well as the extent of delivered service. The variety of designs in the market is limited and presents an interesting differentiation possibility for Agape. The general opinion within the focus groups was that branding is of no great importance. Family and friends appear to be the most important influence for women before purchasing a wedding gown. The focus group participants reacted positively to Agape’s designs and predicted it to be a success in the UK market.

Findings show that women aged 18-34 (83%) and 35-44 (71%) are the most likely to wear a traditional wedding gown, thus these age groups should be prioritised. The report shows that after gaining international experience through expanding in the Nordic region, Agape will be ready to enter the UK market by franchising.
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LIST OF ABBREVIATIONS

BHS – British Home Solutions

CPI – Consumer Price Inflation

FDI – Foreign Direct Investment

FMCG – Fast Moving Consumer Good

FMS – Foreign Market Servicing Strategy

GDP – Gross Domestic Product

M&S – Marks & Spencer

PESTEL – Political, Economic, Socio-cultural, Technological, Environmental and Legal

SME – Small and Medium sized Enterprises

STP – Segmenting, Targeting and Positioning

SWOT – Strengths, Weaknesses, Opportunities and Threats
LIST OF DEFINITIONS

**Couture** – The business of designing, making, and selling highly fashionable, custom-made clothing for women (adapted from Thefreedictionary.com. 2003)

**Economies of Scale** – The extra cost savings that occur when higher volume production allows unit costs to be reduced (Lynch, 2006)

**Fast Moving Consumer Good** - Products that have a quick turnover and relatively low cost

**High Street** – Traditionally refers city centres of UK cities. In this report, High Street refers to shops most often located in these areas which offer dresses at cheaper prices (e.g. M&S, BHS, ASDA, H&M)

**Piggyback** – Exporting indirectly through a larger company’s distribution channels

**Switching Costs** – The real or perceived costs of switching suppliers
Chapter 1
Introduction
1 INTRODUCTION

Agape is a company from Stavanger, Norway. It specialises in wedding gowns, but also offers gowns for other purposes, as well as accessories to go with the gowns, such as shoes, bridesmaid dresses, purses and jewellery. Agape has stores in 5 Norwegian cities, with Sweden, Denmark and Finland as the likely immediate target countries for expansion. In the long term, Agape wishes to expand its business into the UK. In preparing this report, the authors have taken into account the international inexperience of the Client.

The UK bridal wear market value grew by 23% between 2002 and 2007 reaching an estimated £124 million. Traditional wedding gowns are the most important segment within the market. This report examines the UK bridal wear market and more specifically consumer behaviour in that market. The general market has been analysed based on secondary sources of information such as Mintel Reports. This is done according to theory from the fields of international business and marketing. Relevant theory has been reviewed to support the research conducted, but also to give the reader a comprehensive understanding of the subject matter.

In addition to providing a general overview of the UK market, the purpose of the report is to uncover the UK consumers’ attitudes and feelings toward Agape’s wedding gowns, as well as to give an impression of its chances of success in the UK market based on this information. The report should serve as a useful tool for the continued planning of Agape’s expansion plans into that market. To get an in-depth view of the consumers’ attitudes toward Agape’s wedding gowns; primary sources of information (focus groups) have been used.
Chapter 2
Terms of Reference
2 TERMS OF REFERENCE

2.1 Project Title
Agape – The UK Bridal Wear Market

2.2 Parties

2.2.1 The Authors
The authors of the report are all level 3 students on the BA (Hons) International Business course at Leeds Metropolitan University 2007/08. The students are;
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Stine Remoy
Henrik Samdal
Malin Schulze.

They were supervised throughout the year by;
Mr. Lawrence F. Bailey

2.2.2 The Client
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Agape (Greek for unconditional love) is a company from Stavanger, Norway. It specialises in wedding gowns, but also offer gowns for other purposes, as well as accessories to go with their gowns, such as shoes, bridesmaid dresses and jewellery. In Norway, it positions itself with the quote “Made with love”.
Agape has stores in 5 cities in Norway. Although its business concept is mainly franchise based, it also has independent retailers selling and promoting its products.

Customers in this market have a high demand for quality and elegance. Fabrics, incisions, design and quality are what have differentiated Agape from other players in the market. Agape also endeavours to meet all their costumers’ preferences. Fabrics, colours and accessories are created in order to fit each style.

Agape’s concept includes; Agape Bride, Agape Party and Agape Accessories. These divisions together define Agape as a whole, and provide the consumers with everything they need for the perfect wedding, or party for that matter. Its concept is built on several years of experience in the business.

Agape is the leading chain of bridal shops in Norway and its design is highly sought after. Celebrity endorsement is an important part of their promotion in Norway, and they provide gowns for several “celebrity weddings”. This success has facilitated Agape’s step towards an international expansion. Currently, its products are sold only in Norway. Denmark, Sweden and Finland are the most likely short term countries for expansion, with the UK being a more long-term prospect.

2.2.3 Third Parties

Recruitment of focus group respondents:
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Focus group moderator:
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2.3 Time Plan
The signing of a contractual agreement between the parties was conducted in November 2007. The actual research process began in January 2008 and the report is to be submitted 19th May 2008 (see appendix 1).

2.4 Costs
There will be certain costs associated with this project. Such costs may accrue from travel (bus, train, etc.), the purchase of material, binding, telephone and postal charges. In addition, the focus groups conducted required a large sum of money for recruitment. The total projected cost of £3000 shall be imbursted by the client.

2.5 Research Aim
The aim of this project is to explore how Agape should proceed in entering the UK market.

2.6 Research Objectives
The objective of this report is mainly to examine the UK bridal wear market and the UK consumer’s attitudes toward Agape’s products. To be more specific:
- To identify the preferences of the UK consumer
- To determine whether the UK consumer has any particular attitudes toward Norway as country of origin of design in general and bridal design in particular.
- To uncover the UK consumer’s attitude towards Agape’s products
- To identify the entry strategy most suitable for Agape to enter the UK market
- To examine ways for Agape to promote their products in the UK market
- To determine how Agape should price their products seen in the context of the general market price in the UK bridal market
- To determine Agape’s ability to internationalise
2.7 Methodology

Qualitative primary research and secondary research will be conducted in order to reach the aims and objectives. The research methodology is explained in detail in chapter 3.

2.8 Literature Review

A thorough literature review will be presented to give the reader a comprehensive understanding of the existing theory on the subject matter. The findings of the research will then be analysed on the basis of the literature review presented. The literature is explained in detail in chapter 4.

2.9 Limitations

After focus groups had been conducted, the authors felt that it would be useful to get retailers’ perspective on the current trends in the market, as well as some info on the general pricing of wedding gowns. Also, the authors wanted to get their opinions on whether to have accessories and gowns in the same outlet. Due to time limitations, e-mail interviews were chosen as the data collection method. 50 e-mails were sent to retailers in major cities in the UK (appendix 13), but only two replied. This, unfortunately, did not supply sufficient data to draw conclusions upon and will therefore not be presented in this report. Limitations regarding the research that was conducted will be presented in chapter 3.
Chapter 3
Methodology
3 METHODOLOGY

In general, there are two types of research; quantitative and qualitative. Wright and Crimp (2000) argue that regardless of the many pros and cons connected to the different approaches, they should be considered to be mutually supportive methods rather than exclusive. Bryman and Bell (2003) explain that qualitative research can be construed as a research strategy that usually emphasises words rather than quantification in the collection and analysis of the data. Further they state that qualitative research “predominantly emphasizes an inductive approach to the relationship between theory and research, in which the emphasis is placed on the generation of theories” (Bryman and Bell, 2003, p.25). Quantitative research, by contrast, emphasises the quantification in the collection and analysis of the data and entails a deductive approach.

3.1 Design

3.1.1 Primary Data

Primary data is “data originated by the researcher for the specific purpose of addressing the research problem” (Malhotra and Peterson, 2006, p. 97). An inductive approach was used when collecting the qualitative data, meaning that the findings and conclusions were drawn directly from the information obtained from the focus groups (McDaniel and Gates, 2001, p. 122). Morgan (1997, p. 12) states that “qualitative methods are especially useful for exploration and discovery”, which is what this report seeks to do.

Wright and Crimp (2000) explain that when conducting marketing research it is important to collect primary research for a variety of reasons; firstly, the information collected will help to make decisions to a specific problem. Secondly, it is needed to update secondary data. Thirdly, the information available may not be in-depth enough, so the primary research will increase the validation and accuracy of the research. Finally, new product and service attributes need to be assessed based on current customer responses, which makes primary data crucial in this project.
3.1.1.1 Focus Groups

Focus groups were determined as the tool to collect primary data, as focus groups are a good way to uncover how people “feel about a product, concept, idea, or organisation” (McDaniel and Gates, 2001, p. 111), which is relevant to our research aim. Focus groups are, above all, a qualitative research method. Morgan (1997, p.12) states that focus groups “draw on three of the fundamental strengths that are shared by all qualitative methods; (1) exploration and discovery, (2) context and depth, and (3) interpretation”. The dynamics of a group discussion enables respondents to exchange ideas with each other, and one person’s response can be another’s stimulus.

The focus groups took place in London on 28 April 2008, as Agape specifically wanted to know about the possibilities for expansion there. All respondents were consumers from the London area, and also fulfilled a number of other criteria (age 25-39, BC1, getting married in next 2 years/got married in past 6 months, plans to get/got married in a style wedding gown worn in most Christian weddings). Each focus group consisted of a total of 8 women, some of whom were already married and others who were planning to get married.

The respondents were recruited by Indiefield, a market research firm, due to the very specific nature of the selection criteria. Indiefield also provided a venue for the groups, as well as a moderator. The latter, we believe, helped improve the quality of the information retrieved from the focus groups, as opposed to moderating them ourselves, due to the level of competence required to most successfully moderate a focus group.

3.1.2 Secondary Data

Secondary data “represent any data that have already been collected for purposes other than the problem at hand” (Malhotra and Peterson, 2006, p. 97). The main advantages of secondary data are the time and money that can be saved. According to Malhotra and Peterson (2006, p. 97) secondary data can help you to:

- Identify the problem
- Better understand and define the problem
- Develop an approach to the problem
• Formulate an appropriate research design (e.g., by identifying the key variables)
• Answer certain research questions and test some hypotheses.
• Interpret primary data with more insight

Webb (1999) argues that secondary data provides a broader understanding of the research problem as a whole, and may assist to design a relevant and valid research project. Dubois et al. (2007, p. 172) state that “secondary information is sometimes invaluable in order to validate primary information”. Secondary data can be collected from both internal and external sources. It is easily accessible through either the Internet or printed material. In this report most of the secondary research is collected from Mintel Reports (2007).

3.2 Data Analysis

“The raw material of the research process, i.e. data, has to be processed by tabulation, analysis, and interpretation, so that research findings can be communicated to clients and readily understood” (Chisnall, 2001, p. 44). According to Krueger (1998, pp. 45-46) there are four different ways to analyse data from a focus group:
• Transcript-based analysis
• Tape-based analysis
• Note-based analysis
• Memory-based analysis

We have chosen to undergo a tape-based analysis. This involves carefully listening to the tapes from the focus groups, preparing an abridged transcript and thoroughly interpreting the findings.
3.3 Limitations

3.3.1 Focus Groups

There are limitations to focus groups one has to consider when analysing the data. Firstly, there are possible problems of group effects. This includes the obvious problem of dealing with those who “hog the stage” and those who do the complete opposite (reticent speakers) (Bryman and Bell, 2003). Secondly, there is a risk of individual conformity to group norms, meaning that any individual of the group may find it easier to concur with what is the general opinion of the group instead of speaking their own mind. Thirdly, there is the ongoing debate of whether qualitative studies are “representative” of the target audience, given the small numbers of people who give their opinions in them. Lastly, financial restrictions led to only two focus groups being held, as opposed to 3-6 which is more common due to the data from several focus groups being more easily comparable (Bryman and Bell, 2003).

3.3.2 Secondary Data

There are some limitations to secondary data that need to be considered as well. Malhotra and Peterson (2006, p. 98) note that “the value of secondary data is typically limited by their degree of fit with the current research problem and by concerns regarding data accuracy.” Secondary data needs to be evaluated carefully before being applied on account of the objectives and methods used to collect the data may not be compatible with the present situation.
Chapter 4

Literature Review
4 LITERATURE REVIEW

This literature review will consist of the relevant factors that help determine how a company best operates in a market. It will enhance the subject knowledge of the matters this report focuses on. The literature review is divided into nine main parts, these are; (1) Market definition, (2) Globalisation, (3) Industry analysis, (4) Entry modes, (5) STP, (6) Marketing communications, (7) Consumer behaviour, (8) Marketing mix, and (9) Service.

4.1 Market Definition

Kotler (2000, p. 118) defines markets as the “set of all actual and potential buyers of a market offer”. Doyle and Stern (2000) add that it is a group of people with similar needs and wants who might be willing to exchange (for money) in order to satisfy that need or want, and that this is seen from a marketing perspective.

For the purposes of this report, it is also important to define what products are included in the market and its geographic coverage. Any immediate substitute products which can easily replace the product in question may well be included. This is important to avoid any misunderstandings as to what the recommendations and conclusions of the report are referring to.

4.2 Globalisation

According to Ball et al. (2004, p. 9), globalisation is “the international integration of goods, technology, labour, and capital; that is, firms implement global strategies that link and coordinate their international activities on a worldwide basis”. Hollensen (2004) argues that SMEs expand internationally for three reasons: (1) to gain access to new and potentially more profitable markets; (2) to increase competitiveness and; (3) to gain access to new product ideas, technology and resources.
Daniels et al. (2004) argue that companies are forced to expand internationally because domestic competitors, suppliers and customers have become international. The reasons for this, they suggest, are:

- Rapid increase in and expansion of technology has led to tremendous strides in communications and transportation
- Liberalisation of government policies on cross-border movement of trade and resources
- Development of institutions that support and facilitate international trade (made by governments and firms, ultimately reducing risks)

### 4.2.1 The Nine Strategic Windows

The pressure of increased foreign competition can create the need for a company to expand its business to international markets. A thorough analysis of the structure of the industry, as well as a company’s ability to expand internationally, will provide the management with valuable information regarding which strategy to apply. Solberg (2006) lists the following strategies:
The nature of the industry is determined by the international competitive structure and the forces of globalisation within the industry. A company’s ability to internationalise depends on its experience, the degree to which it has an international corporate culture, its market share in the domestic market and its network connections.

The model, in many ways, is a measure to ease globalisation. Each step outlines strategies that are customised to the specific company and their current situation. The model addresses important aspects of a company’s strategy making it applicable to almost any company.

The philosophy of the model is to identify different strategies in order to succeed (or at the very least, survive) in a rapidly increasing global marketplace. However, the model often demands information the company may not have, such as information on its competitors and the structure of competition within international markets. When this information is limited, a company may misinterpret its “strategic window” and base its strategy on this, which could
prove to be fatal. Therefore, information is critical in a company’s assessment of its strategic options.

4.3 Industry Analysis

Once a company has decided to internationalise, and on a country in which to do so, it has to analyse the industry and the market in that country. In this section is an overview of a few useful tools for the purpose of performing such an analysis.

4.3.1 PESTEL Analysis

According to Kotler (2000) the PESTEL analysis is a useful strategic tool for understanding market growth or decline, business position, potential and direction for operations. It is important for an organisation to fully comprehend the way in which it is influenced by different factors in its external environment. The tool is especially useful for companies planning to expand into new markets and new countries as it gives them an overview of the external environment they are entering which can then be analysed for compatibility with their internal environment. The external environment consists of several different factors:

- Political
- Economic
- Socio-cultural
- Technological
- Environmental
- Legal

A comprehensive analysis of the environment should improve a firm’s ability to anticipate changes in the environment and should enable it to adapt to them, possibly gaining competitive advantage in the process.
4.3.1.1 Limitations of PESTEL

According to Lynch (2006), the PESTEL analysis is a checklist which enables managers to categorise the different factors of the environment, rather than an analysis in itself. Campbell et al. (1999, p. 103), argue that the dynamism and unpredictability of the macro-environment is increasing. Further, they say that “this degree of uncertainty has, to some extent, cast some doubt over the value of carrying out a macro-environmental analysis at all”. Therefore, to get the most accurate results, this analysis should be carried out continuously by the firm.

4.3.2 Porter’s Five Forces

According to Porter, the “state of competition in an industry depends on five basic forces, the collective strength of which determines the profit potential of the industry…” (Stonehouse et al., 2004). The framework is designed to investigate those five forces. Understanding the effect that each force has on the competitive environment can help a company develop a strategy which creates opportunities (competitive advantage) as well as protects it from threats from other entities in the industry (Lynch, 2006). The determinants of the five forces are listed below the following figure, which shows the dynamics of the environment.
4.3.2.1 The Bargaining Power of Suppliers

Generally strong when:

- Their products and/or services are important to the industry
- There is a threat of forward integration
- The costs involved in switching suppliers are high
- Suppliers are concentrated
- There are few or no substitute products

4.3.2.2 The Bargaining Power of Buyers

Generally strong when:

- There is a threat of backwards integration
- The costs involved in switching suppliers are low
- There are a number of small, undifferentiated suppliers
- There is strong product differentiation
4.3.2.3 The Threat of Potential New Entrants

Limited by barriers for entry such as:

- Economies of scale
- Product differentiation
- Capital requirements
- Switching costs
- Access to distribution channels
- Cost disadvantages independent of scale
- Government policy

4.3.2.4 The Threat of Substitute Products

Determined by:

- Similarities between the original product and the substitute products (purpose/use)
- The costs involved in switching to a substitute product

4.3.2.5 The Level of Competitive Rivalry

Determined by:

- The number and size of competitors in the industry
- Industry growth
- Costs
- Product development
- Product differentiation
4.3.2.6 Limitations of Porter’s Five Forces

Porter’s framework has been subject to criticism over the years. The criticism revolves mainly around the facts that (Lynch, 2006):

- The framework is static and does not take into consideration that most markets are constantly changing
- It ignores the human resource aspect of strategy
- It stresses that the threat of substitutes and the bargaining power of buyers and suppliers are equally important to all competitors whereas, in reality, some companies will be able to manage these effects better that others.
- It assumes that the environment, including suppliers and buyers, is a threat to the organization whereas, in reality, many companies cooperate and have close relationships with their suppliers and buyers.

Lynch (2006) does however argue that the framework provides a useful overview of the competitive environment.
4.4 Entry Modes

Bakka in 1973 introduced a model categorising organisations’ phases of internationalisation. The 5th phase, global marketing, was added by Solberg (2005) in 1986. The model describes companies’ grounds for decision making, reasons for choice of market, as well as their most likely modes of entry in the different phases of internationalisation. Johanson and Wiedersheim-Paul in 1975 and Johanson and Vahlne in 1977 argued that the experience gained by a company will determine its actions. The knowledge gained from international experience will make the company further equipped and likely to internationalise (Solberg, 2005). According to Kotabe and Helsen (2001), two main types of criteria will influence the choice of entry mode; (1) firm-specific criteria and (2) environment-specific criteria.

According to Stewart (2007) there are five basic modes of entry:

- Export
- Licensing
- Franchising
- Joint venture
- FDI

However, the entry modes mentioned by Bakka are very different. Trading enterprises, “piggyback”, and agents are all different ways of exporting. Sales offices in key markets entail continued exporting but are more of a transitional period. Licensing includes franchising, production means that there is some form of foreign direct investment involved, and strategic alliances are often in the form of joint ventures.
FIGURE 4.4 – THE BAKKA MODEL

<table>
<thead>
<tr>
<th>Motives for export</th>
<th>Trial export</th>
<th>Extensive export</th>
<th>Intensive export</th>
<th>Multinational marketing</th>
<th>Global marketing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational</td>
<td>Operational</td>
<td>Strategic/Operational</td>
<td>Mainly operational</td>
<td>Mainly operational</td>
<td></td>
</tr>
<tr>
<td>Choice of markets</td>
<td>Neighbouring countries at random</td>
<td>Several markets</td>
<td>Market concentration</td>
<td>Market expansion</td>
<td>Consolidation within the triad*</td>
</tr>
<tr>
<td>Market share</td>
<td>&quot;Invisible&quot;</td>
<td>Insignificant</td>
<td>Increasing</td>
<td>Large in selected markets</td>
<td>Large in key markets</td>
</tr>
<tr>
<td>Organisation</td>
<td>Part time &quot;one man show&quot; Distributor</td>
<td>Full time &quot;one man show&quot; Distributor</td>
<td>Export division Agents</td>
<td>International division Sales office</td>
<td>Global or transnational Sales office</td>
</tr>
<tr>
<td>Mode of entry</td>
<td>Trading enterprises 'Piggyback'</td>
<td>Agent</td>
<td>Sales offices in key markets</td>
<td>Licensing Production</td>
<td>Strategic Alliances Production</td>
</tr>
<tr>
<td>Marketing mix</td>
<td>Product demand adaptation Limited promotion Low price</td>
<td>Product demand adaptation Some promotion Low price</td>
<td>Cultural adaptation</td>
<td>Cultural adaptation Profile building High price</td>
<td>Global products &amp; promotion International PR Price leader</td>
</tr>
<tr>
<td>Economic result</td>
<td>Marginal or deficit</td>
<td>Marginal or deficit</td>
<td>Positive contribution</td>
<td>Mutually dependent on domestic market</td>
<td>Main source of income</td>
</tr>
</tbody>
</table>

* North America, Japan & Western Europe

SOURCE: SOLBERG, 2005, P. 126
4.4.1 Export

Many early studies about internationalisation, including Bakka, assume that exporting is the natural mode of entry for companies expanding abroad for the first time (Solberg, 2005). Export is normally conducted due to simplicity and perceived low risk, and is sometimes necessary, as is the case in industries where the domestic market does not produce enough earnings to cover high costs (Daniels et al., 2003). Companies in such industries are known as “born globals” (Solberg, 2005). Exporting can create problems due to less control of the marketing of products in the foreign market, service difficulties and control problems involving intermediaries. A large number of intermediaries can also cause the price of a product to escalate (Stewart, 2007).

4.4.2 Licensing

According to Daniels et al. (2003, p. 420), a licensing agreement is when “a company (the licensor) grants rights to intangible property to another company (the licensee) to use in a specific geographic area for a specific period”. Such intangible property can be patents, processes, trademarks, procedures, etc. The licensee ordinarily pays royalties to the licensor in exchange for the rights. This mode of entry requires lower fixed costs than e.g. exporting and combines the intellectual property of the licensor with the local knowledge of the licensee. However, it involves extensive monitoring costs and can lead to loss of control. A key aspect of licensing is that the licensed property must be identifiable and transferable to be successful.

4.4.3 Franchising

Daniels et al. (2003, p. 422) describe franchising as a form of licensing which “includes providing an intangible asset (usually a trademark) and continually infusing necessary assets”. The franchisor will in many cases provide supplies, training, equipment etc, and the parties are mutually dependent on each other to a much greater extent than in other licensing relationships.
According to Hill (2005), the firm is relieved of many of the costs and risks that may accrue from entering foreign markets independently, as they are shared between themselves and the franchisee. This will give the franchisee an incentive to build a profitable operation quickly in terms of own interest, as well as prevent any case of opportunistic behaviour. By applying a franchise strategy, the firm is able to build a global presence more quickly.

A significant disadvantage connected to franchise is quality control. International franchise makes day-to-day control of operations difficult. “The geographical distance between the firm and foreign franchisees make poor quality difficult to detect” (Hill, 2005, p. 492).

Mendelsohn (1999, p.194) states that ”international franchising is not easy, but if done properly, for the right reasons, and with the availability of the right resources it can, in time, produce positive results.” Further, he outlines some prerequisites to franchising successfully abroad; these are (Mendelsohn, 1999, pp. 195-6);

- The franchisor must have a sound and successful home base which is sufficiently profitable.
- The franchisor must also have manpower resources available which can be devoted solely to the international operations and, above all, he must be patient.
- It is essential to find the right ”partner” in the target territory.

4.4.4 Joint Ventures

A joint venture is a form of FDI where an organisation chooses to own a company in another country with one or more other companies (Daniels et al., 2003). This entry mode can be useful for small companies to get into concentrated markets and to achieve synergies (research and development, technology, etc.). This mode also entails control problems, as well as other problems due to the dynamics between the owners (objectives, importance, contribution, etc. of the parties) (Stewart, 2007).
4.4.5 Foreign Direct Investment

The traditional FDI is a wholly owned subsidiary. Daniels et al. (2003, p. 238) define FDI as “a company controlled through ownership by a foreign company or foreign individuals”, and state that “FDI is now the most important component of international business”. FDI is conducted due to ownership advantages (economies of scale, intangible assets), location advantages (larger market, superior resource base) and internalisation advantages (lower transactions costs (costs arising from control issues, bureaucracy, negotiation, etc.), better control (over suppliers and buyers), increases the company’s contact with consumers (consequently enhancing the organisational learning as described by Johanson and Wiedersheim-Paul and Johanson and Vahlne). FDI does involve greater risk (investment) than other entry modes, and requires great commitment from the company (Stewart, 2007, pp. 17-18).

4.5 STP

Before entering a market, a company has to segment the market, select the appropriate market target and develop its value positioning. These three steps are referred to as “the essence of strategic marketing” (Kotler, 2000, p. 85).

4.5.1 Segmentation

According to Kotler (2000, p. 256), “a market segment consists of large identifiable group within a market with similar wants, purchasing power, geographical location, buying attitudes, or buying habits”. Segmentation is the classification of such groups, in order to more precisely reach the target audience. Doyle and Stern (2006, p. 411) argue that there are two main ways to distinguish customers: through “differences […] in their actual or potential needs, and differences between them in what they may be willing to pay for a solution to their needs”.
4.5.1.1 Segment Criteria

For a segment to be useful, it should be (Kotler, 2000, p. 274):
- Measurable (size, purchasing power, characteristics)
- Substantial (large and profitable enough to serve)
- Accessible (can be reached and served)
- Differentiable (responds differently to marketing stimuli than other segments)

These criteria need to be fulfilled in order for the company to be able to target its marketing communications at the right group of people, and to make sure that that group of people is of relevance to the company.

4.5.1.2 Segmentation Bases

There are four major bases for segmenting consumer markets (Kotler, 2000, p. 264):
- Geographic (region, city (size), population density, climate)
- Demographic (age, family size/lifecycle, gender, income, occupation, education, religion, race, generation, nationality, socio-economic group)
- Psychographic (lifestyle, personality)
- Behavioural (occasions of use, benefits sought, user status, usage rate, loyalty, attitude)

Nowadays, multi-attribute segmentation is the most common form, where elements of several of the abovementioned factors are taken into consideration. According to Dubois et al. (2007, p. 76), “for practical purposes, the selection of segmentation very often is a compromise between behavioural relevancy and the ease of data gathering”.
4.5.2 Targeting

According to Keegan (1999, p. 2006) targeting is “the act of evaluating and comparing the identified groups and then selecting one or more of them as the prospect(s) with the highest potential”. There are three basic criteria for assessing opportunity in global markets:

- Current size of the segment and anticipated growth potential
- Potential competition
- Compatibility with the company’s overall objectives and feasibility of successfully reaching a designated target (Keegan, 1999, p. 206)

According to Kotler (2000) there are generally five ways to target a market:

- Single-segment concentration: A Single product in a single segment
- Selective specialisation: Several products in several markets
- Product specialisation: A single product in several markets
- Market specialisation: Several products in a single market
- Full market coverage: Covering the entire market

4.5.3 Positioning

When a target market has been chosen, a positioning strategy needs to be implemented in that market. Kotler (2000, p. 298) defines positioning as “the act of designing the company’s offering and image to occupy a distinctive place in the target market’s mind”. According to Jobber (2004), positioning is the process of segmenting the market, choosing a target market and selecting which differential advantage to compete with in that target market. In other words, it determines where and how a company competes. Companies which can not compete with the size or reputation of market leaders must create a reason for customers to buy their products despite their financial inferiority. According to Ries and Trout, there are three ways to position a product (Kotler, 2000):

- Strengthen the current position held in the consumers’ minds
- Obtain an unoccupied position
- Deposition/reposition competition (“attack” competitors to change their position in the consumers’ minds)
The positioning strategy has to be implemented throughout the organisation, and must be supported by all aspects of the marketing mix.

According to Elliot and Percy (2007, p. 228), “a positional statement addresses the benefits a [firm] offers a specific target audience in order to satisfy a particular need”. If this is done correctly, it will tell the consumer what the offering is and what they can expect from it. Further, they explain that a positioning statement:

- Satisfies why people need it
- By providing a motivation reason to consider it
- Emphasizing in its advertising an optimum benefit
- With a focus consistent with the motivation driving behavior in the category

Kapferer (2004, p. 102) holds that positioning is best achieved through the following positioning formula:

For … (definition of target market)
Brand X is … (definition of frame of reference and subject category)
Which gives the most … (promise or consumer benefit)
Because of … (reason to believe)

**4.6 Marketing Communications**

Ries and Trout argued that positioning was best done through marketing communications (Kotler, 2000). “Marketing communications is the process of transmitting messages with the objectives of making the organisation’s products or services attractive to target audiences.” (Doyle and Stern, 2006, p.248) It seeks to influence buyer behaviour. The two most important audiences for marketing communications are customers and the trade. Marketing communications basically covers personal selling, sales promotion, media advertising, direct response marketing, and public relations. Doyle and Stern (2006) argue that the product’s appearance, its price, how it is displayed and service provided are all factors that communicate to customers and need to be implemented in the communications mix as well, along with word-of-mouth, which is a powerful communications tool. Communications are used for a number of purposes; to inform, to persuade, image creation, and reinforcement.
Effective communications can be a means of differentiating, and successful communications can add value for customers as well as the trade and other stake holders.

**FIGURE 4.5 – THE COMMUNICATION PROCESS**

The communications process starts with a sender (company) that wants to communicate a message (advertisement, etc.) to an (target) audience. The sender has to put the intended message into words, pictures or symbols that can be transmitted, also referred to as encoding. The encoded message is then transmitted through a medium such as a television advertisement or a letter mailed to a client. If the message is received by the audience, it is then interpreted (decoded). The audience may then respond in some way. Finally, the sender obtains information about the receiver’s response (feedback). According to Monye (2000), some authors consider all marketing mix variables and all the company’s activities as marketing communications, whereas some only consider promotion through the above model as such.
4.7 Consumer Behaviour

When planning its communications strategy, a company has to be aware of its (potential) customers’ behaviour and decision making processes. Consumer behaviour is often a basis for segmentation. The strategy is chosen depending on the type of product and how often it is purchased, the main motivations behind purchase and the degree of risk involved. According to Doyle and Stern (2006) there are three key questions that managers need to look at; what influences buyer behaviour in their market, how do customers make decisions, and who are they influenced by?

4.7.1 Buyer Motivation

There are two main factors that have an influence on the customer; the social factor and the commercial factor. The latter is based on market activities that are developed by the firm to attract buyers, i.e. marketing communications. To make sure that they convey an appropriate marketing communication message, it has to be congruent with the social factors. These are:

- **Cultural factors:** Religion, location and socio-economic group has a huge impact on what type of product that is purchased.
- **Social factors:** The opinions of family and friends are often more important than the recommendations of salespersons.
- **Personal factors:** Age is a critical factor. Older people generally have higher purchasing power, different taste and their lifestyles might impact their view on importance of the product. Personality must also be considered.
- **Psychological factors:** Famous theoreticians, such as Maslow, Herzberg and Freud, all discuss the importance of how people’s needs differ depending on their values and motivations. (Doyle and Stern, 2006)
4.7.2 Buying Roles

Buying roles are vital for marketers to understand when approaching customers, in order to identify the right person to try to influence. A good example is advertisements for men’s products. Even though the target audience is men, marketers know that women’s opinions greatly influence what men buy. This means that an initiator/influencer can be a different person from the buyer/user (a woman would not be looking for a wedding gown unless she had been proposed to by a man). According to Doyle and Stern (2006), there are five basic buying roles:

- **Initiator**: The person(s) who first suggest(s) buying the product or service
- **Influencer**: The person(s) who advise(s) on the buying decision
- **Decider**: The person(s) who make(s) the choice on a component of the buying decision: whether to buy, what to buy, how to buy it, or where to buy it from
- **Buyer**: The person(s) who make(s) the actual purchase
- **User**: The person that uses the product

4.7.3 Types of Buying Behaviour

“One helpful way to characterise the decision making process is to consider the amount of effort that goes into the decision each time it must be made” (Solomon, 2004, p. 294). Doyle and Stern (2006) focus on this idea as well. They list six types of buying behaviour based on two dimensions; (1) degree of customer involvement and (2) degree of customer rationality.
The degree of involvement when buying a product/service will be based on several factors. An expensive product involves higher risks than an inexpensive one, and consequently the consumer will usually have a high degree of involvement when purchasing such a product. A high degree of involvement means that assistance during the evaluation and decision making process is vital, which makes service an important factor in these situations.

**4.8 Marketing Mix**

According to Kotler (2000, p. 15), the marketing mix is “the set of marketing tools that the firm uses to pursue its marketing objectives in the target market”. In other words, when a firm has defined its target market, it must choose a strategy to create the desired position in the consumer’s mind. This position needs to be communicated to the customer through all aspects of the marketing mix.
4.8.1 The 4 P’s

McCarthy holds that there are four aspects of the marketing mix: product, promotion, price and place (distribution channels) (Kotler, 2000).

4.8.1.1 Product

According to Kotler (2000, p. 87), the product is “the firm’s tangible offering to market” (quality, design, features, branding, packaging), but it also includes any support services offered (augmented product), and may in itself be a service. The figure below illustrates Keegan’s five strategies for adaptation of product and promotion to a foreign market.

**FIGURE 4.7 – INTERNATIONAL PRODUCT AND PROMOTION STRATEGIES**

<table>
<thead>
<tr>
<th>Product</th>
<th>Do Not Change Product</th>
<th>Adapt Product</th>
<th>Develop New Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Straight extension</td>
<td></td>
<td></td>
<td>Product invention</td>
</tr>
<tr>
<td>Communication adaptation</td>
<td>Dual adaptation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SOURCE: KOTLER, 2000, P. 379**

*Straight extension* means introducing the existing product in a foreign market without making any changes to it. For this strategy to be successful there must be a need or want for the product in the new market. *Product adaptation* means, much as the title implies, adapting the product according to local preferences, cultural conditions etc. In cases where adaptations are disadvantageous, new products may be developed, or older product may be “re-invented” (*product invention*).
4.8.1.2 Promotion

Kotler (2000, p. 87) states that “promotion includes all the activities the company undertakes to communicate and promote its products to the target market”. When an unaltered product is promoted differently in a foreign market, it is what is known as communication adaptation. When both the product and promotion are adapted it is dual adaptation. Depending on which country a company is entering, some adaptation may be necessary due to cultural, religious or other differences. Such adaptation can vary depending on how homogenous its markets are. According to Chee and Harris (1998), the process of deciding a balance between personal selling and advertising in a market is the choice between a push and a pull strategy. A push strategy emphasises personal selling, or pushing the product toward the consumer, whilst a pull strategy places more emphasis on advertising directed at the end user. The latter places pressure on the distribution channels to stock the product in question as a result of consumer demand.

4.8.1.3 Price

The price has to be congruent with the perceived value of a product (Kotler, 2000, p. 87). Companies must deal with price escalation problems when selling their products abroad due to transportation, tariffs, importer/wholesaler/retailer margins and currency fluctuations (Kotler, 2000, p. 384). These issues can be dealt with in one of three ways:

- *Pricing uniformly everywhere*: ignoring cost differences; could make products too expensive in some countries and too cheap in others.
- *Pricing based on market price in each country*: ignoring cost differences; charging what the market can afford.
- *Pricing based on costs in each country*: using a standard mark-up on costs everywhere; could make prices too high in some markets.
4.8.1.4 Place (distribution channels)

Place, or distribution channels, “includes the various activities the company undertakes to make the product accessible and available to target customers (Kotler, 2000, p. 87)”. When distributing products internationally, it is important for companies to be familiar with international and local aspects of distribution, as it can have an impact on the ultimate quality and price of the product (Kotler, 2000).

4.8.1.5 Limitations of the 4 P’s

The 4 P’s have been widely critiqued for being too focused on the physical product and not enough on services and the customer. Lauterborn suggested 4 C’s that were the 4 P’s seen from the point of view of the customer (Kotler, 2000):

- Product → Customer solution
- Price → Customer cost
- Place → Convenience
- Promotion → Communication

The 4 P’s should be seen in addition to the 3 P’s of service, as services are becoming an increasingly important part of most offerings and of the modern economy in general.

4.8.2 The 3 P’s of Service

According to Mercer (1996, p. 30), in service, three factors, in addition to the four in the “traditional” marketing mix, are important to consider.

4.8.2.1 People

The employees that interact with the customers are of great importance. This is also called the front desk of the company.
4.8.2.2 Physical Evidence

The physical surroundings and how the company expresses itself (e.g. through the characteristics of the store, retail environment).

4.8.2.3 Performance

Customers analyse during and after the service process, making their minds up about whether their expectations have been met gradually.

Effectiveness is a critical competitive factor. Back office activities do not interact with the consumer directly, and thus can be standardised as much as possible. Front desk activities, however, are a basis of competitive advantage and need to be adapted to each individual situation and customer.

4.9 Service

4.9.1 Service Today

Service is the fastest growing sector in the modern economy and covers a range of industries. Companies are buying expertise from consultancy agencies like never before, to help avoid and overcome obstacles they may face. Consumer services are growing in popularity, due to higher incomes and time restrictions (cleaning, gardening, etc.).

Nowadays, a product without any form of service attached to it or vice versa is a rarity. Goods and services are interdependent on each other to fulfil consumers’ needs. The main question is to what extent service should be emphasised, which varies depending on the nature of the product. For instance, a chocolate bar is an FMCG. If a customer’s expectations are not met, he/she will buy a different chocolate bar next time. What if there is no next time? A wedding gown is something presumably bought once; if you do not like it you can not buy a new one. Consumers expect good service, and will avoid the opposite when possible.
4.9.2 Model of Service Quality

Most firms know that if their customers have a good experience when purchasing their products this will increase their willingness to come back and also talk positively about their experiences to friends and family. Within high risk products especially, expertise and service from staff becomes vital. Doyle and Stern (2006) use the following model to illustrate the gap between expected service and perceived service.

**FIGURE 4.8 – PERCEIVED SERVICE QUALITY**

```
Determinants of service quality:
- Access
- Communication
- Competence
- Courtesy
- Credibility
- Reliability
- Responsiveness
- Security
- Tangibles
- Understanding/knowing the customer

Word of mouth  ↓

Personal needs  ↓

Expected service

Past experience

Perceived service

Perceived service quality
```

SOURCE: DOYLE AND STERN, 2006, P. 357

As illustrated in the model, the determinants of perceived service quality are many. These will be analysed by the costumer both by the quality of process and the quality of the outcome. The combination of the perceived service and the expected service (word of mouth and personal needs) will determine the perceived service quality.
4.9.3 Characteristics of Service

A service can be differentiated from a product in many ways. Doyle & Stern (2006) list five factors that can be used to separate services from products:

4.9.3.1 Intangibility

In contrast to a product, a service can not be felt or touched by the consumer. This can lead to difficulties since consumers do not know what to expect as the outcome of the service. To overcome this problem, firms within the service industry try to emphasise other factors that can increase the visibility of the service, thereby giving the consumers a tangible impression of what they are buying, through physical evidence.

4.9.3.2 Inseparability

Services are produced and consumed simultaneously. Therefore, the consumer and the process can not be separated. This makes the firm dependent on the consumer in order to perform their task. This is an obstacle for the firm as it makes efficiency difficult to achieve.

4.9.3.3 Heterogeneity

Heterogeneity is a consequence from the latter feature; the production and consumption happens simultaneously. Behaviour, needs and personality are all different from customer to customer. It therefore becomes vital that the service is delivered individually as well. Knowledge about the customer and their wants will increase the chances of satisfied and loyal customers.

4.9.3.4 Perishability

Since a service is produced only one time, it can not be saved. This issue often creates peak-load problems for companies. It is difficult to know how much capacity is needed from time to time. If the manager fails to find the right balance, this can result to customer dissatisfaction.
4.9.3.5 Ownership

According to Doyle & Stern (2006) the lack of ownership is a basic difference between a service and a good. Since services are leased by the consumer they can only receive the benefits for a limited period of time.
Chapter 5

Primary Research Findings
5 SECONDARY RESEARCH FINDINGS

This chapter shows the findings of the secondary research conducted. The vast majority of the information in this chapter is retrieved from the Mintel Report “Bridalwear – UK – 2007”. The fact that this highly reliable report covers much of what we seek to find out, as well as some interesting secondary data that can be related to the primary research, has resulted in few other secondary sources being found necessary.

5.1 Market Definition

Due to the amount of secondary data provided by the Mintel Report for this report, the market shall be defined as it is in that report, so as to avoid any confusion as to what is included in the information given.

Mintel defines **bridal wear** as “garments purchased for or by the bride to wear at her wedding”. In addition to traditional gowns and two-pieces, other “occasionwear”, suits or dresses **designed specifically** for marriage are also included, as well as second-hand bridal wear. Traditional gowns and two-pieces are of most relevance to this report, and will be distinguished whenever possible. Such traditional gowns will simply be referred to as **wedding gowns**.

Garments that are not exclusively promoted as bridal wear are *not included* in this definition. Neither are **accessories** nor **bridesmaid dresses**, but these shall be mentioned independently whenever appropriate.

The UK includes Great Britain and Northern Ireland.
5.2 Industry Analysis

5.2.1 PESTEL

5.2.1.1 Political

According to Lynch (2006), political factors affecting the industry can be political parties, legislature and government ownership/influence, among other things.

A law was passed in 2005 to prevent “sham” marriages (marriages for one party to get permission to stay in the UK). The number of marriages fell immediately after the introduction of the law; however it has had little or no impact on the bridal wear market due to the normally inexpensive nature of “sham” marriage ceremonies (Mintel, 2007).

5.2.1.2 Economic

According to Lynch (2006), economic factors affecting the industry can be GDP, consumer expenditure, disposable income and unemployment, among other things.

The UK economy is one of the strongest in Europe and people living here are the twelfth richest in the world. The average weekly wage for UK employees was £447 in April 2006 (men: £487, women: £387). Average weekly earnings are highest in London (£572) and lowest in the north east (£399) (BBC News, 2008).

As of 15th April 2008, CPI is 2.5%, above Bank of England’s target of 2% (Bank of England, 2008). The bridal wear market has grown well above inflation, with real growth of 35% from 2002 to 2007, showing the continued importance of bridal wear (Mintel, 2007).

The number of unemployed people as of 2006 was 1.71 million, increasing by 263,000 over the year 2005-2006. 25.5% of people of working age are unemployed. Women as a group, however, are becoming more economically active (BBC News, 2008).
5.2.1.3 **Socio-cultural**

According to Lynch (2006), socio-cultural factors affecting the industry can be cultural changes, lifestyle changes, demographic changes and education, among other things.

According to BBC News (2008), “net international migration into the UK from abroad has been an increasingly important factor in population change”. The increasing cultural diversity of the UK has caused growth in ethnic bridal wear. Nevertheless, traditional wedding gowns are still the most important segment, its continued growth being largely due to increased spending at the top end of the market (pushing the average price per gown up). Non-traditional wear is expanding faster due to the demand being driven by older brides, brides getting married for the second time and the possibility of getting married at other locations than churches (civil ceremonies and foreign locations have never been more popular) (Mintel, 2007).

An increasing number of marriages involve people getting remarried, step-families, etc. These kinds of circumstances influence the decision to marry abroad or have a smaller-scale wedding (BBC News, 2008). The divorce rates have declined slightly, but remain at around 50%, giving an idea of the potential amount of remarriages. Fluctuating marriage numbers have caused stagnation in the demand for bridal wear, yet the market value has grown by 23% since 2002 to an estimated £124 million in 2004 (Mintel, 2007).

The life stage at which women marry has tremendous impact on the amount of money they are able and willing to pay for a wedding gown. Women tend to marry later as they are becoming increasingly career minded. As working women have less time for wedding planning, demand is likely to increase for time-saving services (e.g. online shopping, lunchtime gown fittings) (Mintel, 2007).

UK’s population is ageing due to declines in the mortality rate and in past fertility rates (BBC News, 2008). Older brides tend to favour less traditional wedding gowns, but generally have more money at their disposal when shopping for a wedding gown (Mintel, 2007).
5.2.1.4 Technological

According to Lynch (2006), technological factors affecting the industry can be new technology, research and development expenditure, and new patents and products, among other things.

The boom in Internet trading that has greatly affected most other industries has not yet come in the bridal wear market. Reluctance among suppliers due to loss of control and fees of fittings etc., in addition to customers’ desire to see and feel the product are the main drivers behind this. The Internet has become a hugely important forum for word-of-mouth (You and Your Wedding and Cosmopolitan Bride message boards). Mintel (2007) found that as much as 28% of brides would consider purchasing their gown online, but that only 2% did so.

5.2.1.5 Environmental

According to Lynch (2006), environmental factors affecting the industry can be “green” issues that affect the environment, among other things.

Consumers are becoming increasingly concerned about the wellness of the environment (BBC News, 2008). In the bridal wear market this is evident through the use of eco-friendly textiles (e.g. hemp and organic cotton) and the reuse of bridal gowns. Oxfam sells “recycled wedding gowns” in nine bridal shops (Mintel, 2007).

5.2.1.6 Legal

According to Lynch (2006), legal factors affecting the industry can be competition law and product safety issues, among other things.

The stable UK economy and the EEA (European Economic Area) should not present Agape with any unexpected legal problems.
5.2.2 Competitive Climate

In light of Porter’s five forces framework, the following can be said about the competitive climate in the bridal wear industry.

5.2.2.1 The Bargaining Power of Suppliers

Due to the extremely fragmented nature of the supplier structure and the fact that the fabrics (silk, satin, georgette, chiffon, organza, brocade, dupion silk) needed to make a wedding gown are relatively easily procured (Mintel, 2007) the bargaining power of suppliers are low.

5.2.2.2 The Bargaining Power of Buyers

The wedding gown market as a whole is relatively undifferentiated. Most retailers offer the same styles of gowns, and brands are not important to the customer (Mintel, 2007). Normally, this would mean that buyers could easily switch suppliers. However, since it seems very important to the consumer to find “the one” gown and most women have a clear idea of what this gown looks like, if it is found, they may not be able to switch quite so easily. Brides are willing to stretch their budget in their pursuit of “the one” gown. On the whole, it is safe to say that buyers’ overall switching costs are low, but that in cases where “the one” gown has been found, this is not the case. Still, the bargaining power of buyers is high.

5.2.2.3 The Threat of Potential New Entrants

New entrants are very likely as there are few entry barriers. However, seeing as the market is extremely fragmented, most new entrants will be very small and will generally not pose a very large threat to individual companies (Mintel, 2007).

5.2.2.4 The Threat of Substitute Products

Some brides-to-be choose not to spend a great deal of money on their wedding gown. As an alternative they purchase second-hand gowns or rent a wedding gown. This however, is not very common in the UK market. Research shows that just 2% of married women had hired their wedding outfit (Mintel, 2007). Nevertheless, responses among the unmarried women
suggest a much higher potential interest, as more than one in five (23%) say they would consider hiring an outfit. Formalwear and occasion dresses have become increasingly popular among brides getting married for the second time. This mainly includes women aged 55 and above. According to Mintel’s (2007) consumer data, approximately one in five (19%) brides buy their gown from a high street clothing store. Another popular alternative to traditional wedding gowns is ethnic dress both as a cultural and fashion statement. If a bride decides to have a traditional wedding (as the majority does) with everything that goes with it, there are no substitutes to the traditional wedding gown. If she moves outside of the traditional framework however, she has a few options regarding what to wear.

5.2.2.5 The Level of Competitive Rivalry

There are several big companies on the UK bridal market. Pronovias is a Spanish supplier/retailer that distributes to more than 100 outlets in the UK. They currently claim 5% share of the UK market. Pronuptia is another company that possesses a significant share of the UK bridal market, being the one of the largest bridal brands worldwide. Others worth mentioning are Ian Stuart, Maggie Sottero, Amanda Wyatt, Sincerity, and Alfred Angelo, all of which have a significant market presence (it is however hard to determine exact market shares due to the fragmentation of the market, see appendix 12 for an overview of the leading suppliers). There is no apparent dominant company in the market. Mintel (2007) considers the market to be extremely fragmented in terms of being supplied by a huge number of companies, very few of which have their own retail outlets. Due to this the competitive rivalry is quite low in the market in general.
5.3 Entry Modes

Few suppliers in the UK bridal wear industry operate their own retailers. In fact, out of the top 14 suppliers, only four do. The supply is extremely fragmented, with the majority of the companies supplying a vast number of independent outlets, and some also supplying the larger bridal multiples, such as Pronuptia (Mintel, 2007). For foreign companies supplying the UK market, exports through agents is the most common FMS. The market is divided as follows:

- Independent retailers: 40% value sales (estimate)
- Multiple bridal stores (such as Berketex and Pronuptia): 30% value sales (estimate)
- Department stores (including M&S, BHS, etc.): 25% value sales (estimate)
- Other (e.g. e-commerce and second-hand): 5% value sales (estimate) (Mintel, 2007)

5.4 Segmentation

The traditional wedding gown segment accounted for 89% (134,000 units, down 3% since 2003) of the volume and 97% (£120m, up 7% since 2003) of the value of the bridal wear market in 2007. The value rose due to increased spending at the top end of the market. Although the majority of the purchases are at the lower end, the average price per gown has increased. 75% of sales are worth less than half the market in terms of value (Mintel, 2007).

Traditional gowns are more common among young, affluent brides, and non-traditional bridal wear is more common among older and/or less affluent brides. More brides dream of getting married in traditional wedding gowns than actually do. 28% of women asked (in Mintel’s survey) got married in a non-bridal outfit (Mintel, 2007).

83% of women 18-34 asked wore a traditional wedding gown. Brides belonging to the socio-economic groups (see appendix 10 for an explanation of socio-economic groups) A and B, as well as brides in the north east of England and Scotland are more likely to wear traditional wedding gowns than others. It is possible that traditional gowns designed to be more flattering to older brides could persuade them to wear one (Mintel, 2007).
5.5 Marketing Communications

Since 2003, the industry spend on advertising has been consistent around 5-6% of market value (£6-7m). The biggest companies are naturally the biggest spenders (Mintel, 2007).

Press is the main advertising channel with bridal magazines being the most important. A dedicated wedding channel called Wedding TV was launched in 2006, and is used for advertising and product placement. The Internet is becoming ever more important, however, as brides are becoming increasingly busy. Such websites as You and Your Wedding and Cosmopolitan Bride are important forums for word-of-mouth marketing. Confetti.co.uk is the biggest website, claiming to reach 90% of UK brides (Mintel, 2007).
Chapter 6
Secondary Research Findings
6 PRIMARY RESEARCH FINDINGS

6.1 Important features

Both focus groups found it easy to point out important features that are often considered when buying a wedding gown. The features most frequently mentioned were quality, the detail of the gown and the fabric (‘the figure’, ‘the quality is important’, ‘the details’, ‘the material’). Furthermore, it is apparent that the preferred style is usually based on a traditional gown with a modern touch (‘I like traditional but not too meringue’, ‘tradition with a kind of modern twist’, ‘the detail I think is more modern’).

6.2 Current market offerings

The participants felt they could not find enough variety within the wedding gown market today, they felt there were too few gowns with straps (‘90% are strapless’, 95 % of the dresses in the shops were strapless’). They also found the gowns very similar and also that it was difficult to tell the difference between the gowns (‘I don’t find enough different styles’, ‘not so much choice’, ‘I don’t find enough different styles’). Additionally, they all agreed that service is quite important and this should be focused more upon (‘number one’, ‘very important’, ‘we actually chose not to go to one shop because we had been treated appallingly’).

6.3 Brand importance

The participants had an overall agreement that the brand names did not have an influence on the purchase (‘did not even look’, ‘not important at all’). It seemed that brides in general do not know or care about brand names when considering buying a wedding gown (I didn’t even think about the names at all’, ‘was not even aware of any brand names’).
6.4 Price

The findings suggest that the price varies a lot and must be seen in the context of each gown. Some of the participants said they would not spend more than a certain amount on the gown (‘very important’, ‘trying to stick to it as best as you can’), whereas others would go above the budget if they found the perfect one (‘I think people always go a bit over’), (probably over’).

6.5 Influences

The most common influence mentioned within both groups was the opinions of family and friends (‘you can’t beat recommendations’, ‘other peoples opinions’, ‘it’s important to me what people think’, ‘friends’ recommendations’). Other factors had a lot to say too, such as their figures, the weather, where they got/are getting married and the budget (‘my figure’, ‘mine is financial’, I would not bought anything before I was 100 % sure because you’re spending all that money’).

When searching for information about the bridal market and most important; the wedding gowns, they all found/find it useful to look at bridal magazines (‘gather ideas from the magazines’, ‘magazines’, ‘I prefer the magazines’, ‘when people are getting engaged the first thing friends and family do is to buy magazines for you’),. They also use/used Internet during this process (you look at websites and then visit the stores’, ‘Internet is great if you want information’, ‘I found the internet useful’). Clearly, friends that have already got married are also an important influence (‘people I do trust’, ‘friends that already have got married’, ‘friends’ recommendations’). Both groups agreed that the use of celebrities to model the gowns is unnecessary. Most of them said it was difficult to relate to them and this would therefore not give the same effect as a ‘normal’ woman would give (how can you tell they will look good on you’, ‘that would be her dress, that would not feel like a dress that was made for me’).
6.6 Accessories

The findings suggest that accessories are nearly as important as the gown itself (definitely second to a dress’, ‘they finish it off’). There were different opinions within the groups considering where accessories should be offered. Some of the participants thought they should be able to shop for everything at one place (‘nice to have just one place to go back to’, ‘hypothetically; upstairs all the dresses, downs stairs a lot of shoes, and maybe another floor with hair accessories, that would be fantastic’, whereas others said it was nice to shop around and find their accessories in different places (‘sometimes it is nice to shop around’, ‘depends on the shop’).

6.7 Norwegian Design

The participants found it difficult to mention typical words when thinking of Norwegian design. Actually, there was a long silence before people even started talking (‘I don’t associate anything with Norway’). After deeper thoughts they came up with associated words such as; (‘simple’, ‘cold’, ‘winter’, ‘jacket’, ‘snow queen’).

6.8 Agape

When showing Agape’s brochures, the reactions to most of the group members were quite positive (‘I love that’, ‘that makes sense’, ‘brochure is fantastic’, ‘it’s so amazing’, ‘lovely’, ‘we all would find something we like’). At the same time several of the participants pointed out the bad idea of choosing only one model when there were so many different gowns (‘girl being blond all way trough’, ‘it seems to be using the same model on loads of different style dresses’, ‘does not look like it fits her properly’, ‘they do look too big’, ‘they do not fit her’). Consumers in the UK wedding gown market are not very enthusiastic about celebrity endorsements for wedding gowns. If they had to mention particular names that could be used to promote Agape, they all agreed that Colleen McLoughlin (Wayne Rooney’s girlfriend) and Georgia Taylor (actress) would be suitable (‘if they really wanted to use a celebrity I would prefer it was someone like Colleen’, ‘I like Georgia’, ‘I like her as well’).
After showing the magazine from Agape, there were different opinions about what the actual prices of these gowns were likely to be. The participants in group 1 said they thought it was probably £1000 - £1500 (‘£1200’, ‘around £1000 - £1500’, ‘£1000’), whereas group 2 thought it could be up to £2000 and would suit the upper middle market (’a couple of thousand’, ‘can’t see that any of these are over 2000£’).

Agape’s gowns and its concept fascinated most of the respondents in the focus groups and they thought Agape would do quite well if it came abroad (‘I do think that if the shop was here people would have a look’, ‘I think they would fit in’, ‘I certainly want to visit this store’, ‘I think they would do it quite well’, ‘they are doing something different and that is what the market need’). The participants were also asked to give advice to Agape if it does decide to come to UK. They all responded with a lot of enthusiasm (‘try to get as much under one roof’, ‘would be best if they had their own shop’, ‘I would say its own store’, ‘you got the same design but different tops to it, maybe if they do want to come into the market they need to build more on that’).
Chapter 7

Discussion of Findings
7 DISCUSSION OF FINDINGS

7.1 The Industry

In light of the nine strategic windows framework presented by Solberg (2005), the bridal wear industry is best described as neither local nor global, but rather something in between. There are several international firms operating globally (out of the top 14 suppliers to the UK market, five are foreign and one is 50% foreign, and of the eight UK companies, six have international presence) (Mintel, 2007). However, there are a vast number of local suppliers as well. There are no major forces working against the globalisation of the bridal wear industry, which, in addition to the international competitive structure, is why it is best categorised as a semi-global industry. Looking at Solberg’s (2005) nine strategic windows, depending on Agape’s ability to internationalise, it should either:

- prepare for globalisation
- consider expansion into new markets
- seek niches in international markets

Agape is a relatively small, internationally inexperienced company with limited international networks. These facts suggest that Agape’s ability to internationalise is low. However, it is planning to expand throughout the Nordic region before doing so in the UK. This kind of expansion concurs with Bakka’s suggestion that companies in the trial export phase choose neighbouring countries for expansion at random. The similarities between these markets and the Norwegian market can provide Agape with the international experience it needs (as mentioned by Johanson et al. (Solberg, 2005)) without imposing on itself the same level of risk as it would entering the UK immediately.

7.2 Entry Modes

For foreign companies supplying the UK market, exports through agents is the most common FMS. The fact that this is the most common is quite natural as the majority of retailers are independent, making networks important. Agents specialising in the field will obviously have better developed networks than a foreign company. This type of export was identified by
Bakka as the second stage of internationalisation; extensive export. According to Solberg (2005), during this stage it is important not to start exporting to too many countries at the same time, as the firm rarely has the resources to control or learn from their marketing efforts in several countries.

The majority of wedding gowns sold are standard size and then altered to fit (with some exceptions, e.g. High Street, tailoring). For many brides the “retail experience” of buying the dress is a very important part of the wedding process. Despite the obvious possibility for differentiation in retailing, only four of the top 14 suppliers to the UK operate their own retailers, thus most retailers are independent. This presents Agape with interesting differentiation possibilities.

Opening self owned retail outlets could allow Agape to offer the desirable level of service and customisation. However, this would require extensive experience and resources which Agape does not necessarily possess at present.

Franchising has proven a successful mode of expansion domestically for Agape. As it holds a strong position in its domestic market, it already fulfils one of Mendelsohn’s (1999) three prerequisites to franchising successfully overseas. According to Agape it will employ a director of international operations, whose experience will only grow as it now plans to expand to Sweden, Denmark and Finland. This will increase Agape’s knowledge about international operations which according to Mendelsohn (1999) is a vital factor to achieve success internationally. Lastly, the fact that Agape has lengthy experience in domestic franchising would imply that it has sufficient knowledge of how to find the right “partner” to engage in franchise with. Ultimately they fulfil all the criteria outlined by Mendelsohn (1999) in order to be successful in international franchising.

The costs of controlling franchisees are considerable, and it is extremely difficult to have absolute control over the performance of the franchisees. Hill (2005) proposes a way around this issue; “to set up a subsidiary in each country in which the firm expands”. This could be an option over time for Agape, placing its own manager in the subsidiary to help ensure that it
is doing a good job of monitoring the franchises. To do so would increase Agape’s overall control of its foreign franchisees.

The advantage to applying a franchise strategy would present Agape with less risk and costs, as these will be divided between Agape and the franchisee. In addition, the franchisee will have an incentive to build a profitable operation as quickly as possible (Hill, 2005), and through strict guidelines, Agape through its franchisees could offer the same level of service as it does in Norway.

7.3 Consumer Behaviour

7.3.1 Buyer Motivation

Doyle and Stern (2006) argue that the motivation for buying a product is based on social and commercial factors. The focus groups made it perfectly clear that the opinions of family and friends have a huge impact on the wedding gown decision making process. Additionally, the woman’s personality often affects what type of style she prefers. An extrovert person would more often consider wearing a unique and different gown whereas an introvert person would look for something more classic.

Lifestyle and purchasing power are other important personal factors. According to Mintel (2007) most women have a budget for their wedding gowns and manage to stick to it. This was also the case in the primary research where some of the women had a strict budget and could therefore not spend so much. Their motivation for buying a cheaper gown was basically that they could not afford a more expensive one. Other participants could use several thousand pounds and go above the budget if they found the perfect gown. However, Mintel’s (2007) survey showed that only 7% of women asked had actually gone above budget.

Doyle and Stern (2006) argue that factors such as values and needs differ from one person to the next. One value in particular is mentioned by Mintel (2007); being environmentally friendly. This results in a growing popularity of organic weddings. This was not mentioned at all when important values were brought up in the focus groups. Instead, the women wanted
gowns that gave them a feeling of being a princess regardless of fabric. Others thought it was important to consider the weather and how the gown would fit into the circumstances. It seems that, overall, the one thing that all brides agree upon, is the importance of the gown being the “perfect one”.

Furthermore, the women in the focus groups all agreed upon the importance of word-of-mouth. Advice and opinions from family and friends were very important to them. Secondary research shows that the Internet is growing in importance: especially for word-of-mouth marketing. This was not the case in the primary research. Most of the focus group respondents thought that the Internet is useful when searching for information, but they all agreed that it was difficult to get a real impression of a gown online, and that it in any case was necessary to see the gown in real life.

7.3.2 Buying Roles

According to Doyle and Stern (2006), there are five basic buying roles. The initiator for buying the gown was not discussed within the focus groups, but obviously, the woman starts her purchasing process once a proposal has been made, usually making the bride groom the initiator.

Family and friends were frequently mentioned when discussing the importance of influence; their opinions had a lot to say. According to Mintel (2007), firms’ use of celebrities gives significant results. This was not in congruence with the conscious opinions of the focus group respondents. Most of the women felt that celebrity endorsement did not have an effect on them. Celebrities were people they could not relate to, and they felt it would be more suitable to use “the girl next door” to promote the gowns.

When the decision had to be made, it was basically about the feeling of wearing the gown and when it all comes down to it, it is the bride who decides which gown to wear, although some respondents said they would not pick a gown that their mother, for instance, did not “approve of”. Some of the participants said that they had a budget to stick to because their parents were paying. If they wanted to go over, they had to pay the extra themselves. The buyer of the
gown could thus be the bride herself, her family, or in some cases, both. The bride ultimately *uses* the gown.

### 7.3.3 Types of Buying Behaviour

A wedding gown is presumably a once in a lifetime purchase. It is a high risk product, not only because the gowns are potentially expensive but also because it will have a huge impact on the perceived successfulness of the most important day in most women’s lives. Consequently, the vast majority of wedding gown purchases will be high involvement. The degree of rationality is limited because of the sentimentality involved. However, Mintel (2007) data shows that the wedding gown is not necessarily considered the focus of the wedding; actually 48% of women consider it senseless to spend a lot of money on a gown that is worn on one day only. Still, as the primary research illustrates, the bride wants to look beautiful and is willing to pay extra for it. As figure 4.6 illustrates, a high degree of involvement and a low degree of rationality is normally an image based decision. According to Doyle and Stern (2006), the communications task for approaching this type of decision is to discover an image that appeals to the target segment and to find a subtle way of presenting the appropriate association.

### 7.4 Service

According to Doyle and Stern (2006), there are five characteristics that distinguish services from other products. These are intangibility, inseparability, heterogeneity, perishability and ownership. As the marketplace becomes more and more global, it is becoming increasingly difficult to differentiate one self through the physical product. For this reason, services have become an immeasurably important part of the augmented product. This is very much the case in the bridal wear industry, where the consumers want what is more like a tangible service than a physical product, and the lines between product and service are blurred.

As mentioned in the literature review, Doyle and Stern (2006) list several factors that have an impact on service quality. Furthermore, they argue that word-of-mouth, personal needs and past experience are what result in customer expectations. Mintel (2007) states that service is
extremely important when buying a wedding gown and that this is the unique selling point of the independent retailers. When service was discussed in the focus groups, several of these factors were mentioned. They highlighted the importance of honesty and the relationship with the staff, but also that their knowledge about the different gowns and the alterations that could be made to them was vital. They also said that opinions and experiences they shared with friends and family had a great impact on which retail outlets they chose to visit. There was a consensus among the participants that once they had been treated badly somewhere they would, most likely, never return to that particular outlet. Therefore, as Doyle and Stern (2006) point out, the expected service and the perceived service need to be congruent in order to satisfy the customer (figure 4.8).

Three factors, in addition to the 4 P’s of the traditional marketing mix must be considered for services. People are the employees that interact with the customers. Both focus groups felt that how the employees serving them had a huge impact whether or not they would come back. Feedback, honesty and insight from the staff were critical factors for good perceived service. This agrees with the data from Mintel (2007) that states that service is extremely important when buying a wedding gown. Process involves the impression and treatment the customer receives from the first meeting with the firm to the final purchase. Continuity is therefore important to emphasise so that the consumer’s impression as a whole is consistent instead of confusing. The third factor is Physical evidence. According to Mintel (2007), the consultations and fittings are seen by many brides-to-be as an integral part of the whole ritual. The primary research also illustrates this importance. For example, some of the participants found it vital that the shops let them use the toilet. This is one of many attributes that signalise how service oriented the firm really is.

7.5 STP

7.5.1 Segmenting and Targeting

97% of the value of the UK bridal wear market is accounted for by traditional wedding gowns, showing the importance of that segment. A majority of women who get married in the UK who choose a traditional wedding gown are between 18 and 34 years old, closely
followed by those aged 35-44. According to an Internet survey conducted by Mintel (2007), 83% of women aged 18-34, and 71% of women aged 35-44 get married in a traditional wedding gown. Considering that only 64% of all women wear a traditional wedding gown, the youngest age groups should be prioritised.

There are some differences with regards to geographic location of brides who prefer a traditional wedding gown. The greater London area, East and West Midlands and Yorkshire all have an above 60% average in terms of wearing a traditional wedding gown. Socio-economic groups A and B are the most likely to purchase a traditional wedding gown, closely followed by C2 and then C1.

Primary research suggests that stores located in London are not necessarily preferred by the consumers. One of the participants in the focus groups explained that she had to go to Sheffield in order to find her wedding gown; “you think you’re getting a better choice in London but I found mine in Sheffield”. Local shops were largely preferred to more branded outlets in the centres of large cities. However, London has a large number of bridal wear outlets and the market is big, as people even come from abroad to shop for a wedding gown there. Manchester is generally considered to be the “wedding capital” of the UK and is an important city to consider. Other densely populated cities like Birmingham and Liverpool are also of interest. Although the geographic differences in preference are small, this is also a criterion that might be useful to take into account.

The 16 focus group respondents were aged 25-34, with the exception of one 35-year old and one 36-year old. There were six respondents of socio-economic group B and 10 of socio-economic group C1. Although secondary research shows that C2’s (in addition to B’s) are more likely to purchase a traditional wedding gown than C1’s, the prices of Agape’s gowns effectively rule them out as a potential target audience. Targeting primarily B’s may have a positive effect on C1’s aspiring to go that extra mile.

Due to the nature of bridal consumer behaviour, multi-attribute segmenting is necessary to identify segments which fulfil the segmenting criteria. Segmenting on demographic (gender, age, socio-economic group) and psychographic (people outside age group who have same
type lifestyle are of interest) bases seems to be the most viable option. Although behaviour (in terms of level of decision making rationality) is also somewhat important, it is difficult to measure such a characteristic. However, the former criteria should provide bases for segmentation that are measurable, substantial, accessible and differentiable.

Based on Keegan’s (1999, p. 206) targeting criteria, Agape could consider targeting the segment that is “the most compatible with the company’s overall objectives and feasibility of successfully reaching a designated target”. Because it is new in the market, this may be more crucial to success than the size and growth potential in the market. Agape could also consider different product and market specialisation strategies; however, with its domestic strategy in mind, market specialisation (several products in a single market) would be most natural to them.

7.5.2 Positioning

According to primary research, British brides-to-be have a split view on Norwegian design. Some saw it as “simple and plain”, “cheap”, and “boring”, while others concluded it was “elegant”, “sometimes simple can be good” and “clean”. With this in mind, it is uncertain whether Norwegian design would create a positive image for Agape. On the other hand, it could imply that it has something different to offer than what is already on the market.

Primary research indicates that there is too little variation in the market; “I don’t find enough different styles, there is not enough variation” and “different designer, but similar styles”. The participants expressed a positive attitude towards Agape’s gowns saying: “we all would find something we like” and “big selection of style here” in addition to “stunning”, “lovely”, and “it’s so amazing”.

Furthermore, findings show that women looking to buy a wedding gown would expect to pay £1000-£1500, possibly a little more, in order to purchase one of Agape’s gowns. This would make their prices similar to Berketex’s, which are “expensive, but not too expensive”.
Agape could benefit from “obtaining an unoccupied position” in the market, by positioning itself as a company offering a wider assortment of choice and customisation than “the rest”. Due to the importance of service, service quality (which is delivered!) is also something that is important to communicate.

### 7.6 Marketing Communications

According to Doyle and Stern (2006), positioning is best done through marketing communications. Marketing communications essentially affects consumer behavior; meaning the consumer’s attitudes and feelings toward a company as a whole. Findings from the primary research show that consumers are very much influenced by word-of-mouth, and the opinions of and advice from friends and family. To facilitate this kind of marketing communications, Agape will need to succeed in satisfying its early customers’ needs.

According to Mintel (2007), the bridal wear market is supplied by a vast number of companies, very few of which have their own retail outlets. If Agape was to open its own retail outlet, it would be easier for them to communicate the service message in the desired way, and to get into the mind of the consumer. Information from Mintel (2007) suggests that, due to the lack of brand importance, a company will have an advantage by having their own retail outlets with only their own designs, where they are able to personally train their staff to ensure that the service is delivered the right way (the “Agape way”).

Agape’s communications process starts with a message to its target audience. It will have to encode this message carefully whenever entering a new market. Agape’s basic message should be that it offers exquisite design to a manageable price with excellent service. This message needs to be communicated through the right marketing channels in order to reach its target audience. This is discussed more thoroughly in the marketing mix section. As Doyle and Stern (2006) explain, if the consumers interpret the message they will respond in some way, may it be in a positive way (e.g. visiting the outlet) or negative way (e.g. neglecting the message entirely). Either way, the response, or lack there of, will present Agape with the opportunity to adapt more closely to local conditions in the market and the best way to communicate its message to the target audience.
7.7 Marketing Mix

As mentioned in Chapter 4, it is crucial that the company adapts its marketing mix to fit local conditions in the host country. In this section we will examine Agape’s marketing mix in the context of the UK market and the findings from both primary and secondary research.

7.7.1 Product

According to Kotler (2000), the product is the firm’s tangible offer to the market, which is primarily wedding gowns (but also accessories) in Agape’s case.

Findings from the primary research suggest that most of the participants are dissatisfied with the fact that approximately 95% of the gowns already in the market are strapless. Further, they argue that the gowns offered in different shops are very similar in terms of design. The respondents were very impressed by Agape’s designs, and even suggested that it has an advantage in its product variety. This, in addition to the fact that most wedding gowns are subject to some customisation based on customer preferences in any case, suggests that extensive product adaptation is unnecessary.

The primary research also suggests that the respondents did not see Agape’s party dresses as fit for bridesmaids, and would prefer to find the bridesmaids’ dresses in the same place as the wedding gown. Furthermore, the respondents were very enthusiastic towards the prospect of offering wedding gowns, accessories and bridesmaids’ dresses under one roof.

7.7.2 Promotion

Primary research shows that most brides-to-be are predominantly influenced by word-of-mouth and the opinions of family and friends. Most of the respondents identified wedding magazines as their second most influential source, and that they often affected which retailers they visited. According to Mintel (2007), wedding magazines are indeed the main form of advertising in this industry.
Findings from the secondary research suggest that the Internet is an emerging medium in this industry, especially in terms of word-of-mouth. However, according to our primary research, the respondents had differing feelings toward this issue. On the whole, it seemed that the brides thought the Internet was a useful tool for getting an overview of which retailers stock which brands etc., but not for finding the right gown. Nevertheless, due to the fact that most women at some point use the Internet for informational purposes, an online presence is important.

The primary research showed great enthusiasm towards Agape’s catalogue among the respondents. They had never seen anything like it before, and felt it could be an advantage Agape. However, they disliked the fact that the same model is used in most of the photos. They felt that the most important thing was that the gown was tailored to fit the model, which was not the case, in their opinion, in many of the photos in the catalogue.

Findings from the focus groups also showed a negative attitude towards celebrity endorsement in this market. The respondents claimed that they did not to relate to a famous person in a wedding gown in the same way they are influenced by a celebrity endorsing something like lip gloss or hair conditioner. These reactions showed that that the target audience is more interested in seeing the “girl next door”, their best friend or work colleague as models for the gowns. In other words, women they can relate to. However, Mintel (2007) found celebrity weddings have contributed to the rise of average price of each outfit and the fact that people are willing to spend more money on a wedding gown. One of the respondents pointed out that if the person endorsing the company is the designer or founder, it might have a more positive effect (e.g. Sarah Jessica Parker).

Regarding the research on “country-of-origin” effect, the findings showed that UK consumers did not have any feelings toward Norwegian design in particular. Still, they came up with the following adjectives to describe Norwegian design on wedding gowns: “Snow queen from Narnia, white, jacket, elegance, winter, cold, long sleeves”. These findings suggest that focusing on Norway as country of origin is not necessarily an advantage for Agape. However, the respondents were very enthusiastic about the designs they were shown.
Additionally, it is crucial to choose whether to approach the market with a push or pull strategy. Agape is currently using a pull strategy, with a distinct market presence in the domestic market, often in the form of sponsorship. A pull strategy would also be the most natural option in the UK, building demand for the products through promotion and advertisements, due to the fragmented nature of the market.

The findings indicate that Agape will not need to adapt its products, but its promotion to a certain extent, resulting in communication adaptation (figure 4.7).

7.7.3 Pricing

The price of a product needs to be congruent with its perceived value (Kotler, 2000). The focus group respondents assumed the average UK wedding gown was around £1500. The average price for a wedding gown in 2007 was, in fact, around £900 (Mintel, 2007). The respondents estimated that Agape’s gowns would cost somewhere between £1000-2000 and some thought £1500 would be the upper limit. This suggests that Agape can at least price its products uniformly in the UK and Norway, and that it can, if necessary due to extra costs, or possible due to market prices, even price them slightly higher.

7.7.4 Place

The largest market in the UK is London High Street. However, due to the unavailability and expensiveness of such locations, more peripheral areas of London are realistic alternatives. Many respondents thought that those kinds of shops were much better options due to the higher level of service often experienced here. One respondent even went to Sheffield to get her gown.

There was consensus among the respondents that Agape should open its own retail outlets in the UK, to be able to offer only its own unique design, and to have absolute in-store knowledge about all its gowns.
7.8 SWOT

A SWOT analysis is used to evaluate a company’s strengths, weaknesses, opportunities and threats. This model provides the basis and gives directions for the development of a marketing plan (Kotler 2000). This is also a way to sum up the findings of this project.

7.8.1 Internal Analysis

7.8.1.1 Strengths

Agape is currently driven towards international expansion due to its strong position in the domestic market. In order to decide whether or not to pursue an expansion, it is important to evaluate the company’s internal strengths, to determine if it might have a competitive advantage.

Firstly, Agape holds a strong position in the domestic market, as the only specialist retail outlet, containing only its own designs. Additionally, it supplies other retailers. The strong position in the domestic industry has made it substantially easier for Agape to maintain this strong market position through promotion and word-of-mouth, as it has no direct competitors.

Furthermore, according to primary research, Agape’s products appeal to UK consumers, and especially the wide variety of different designs in their collection. This is an advantage in entering the UK market, as secondary research shows that 95 percent of the gowns currently offered in the market, are strapless (Mintel 2007). Additionally, this variation means that it will be able to reach a wider target audience, with the advantage that it offers something for every taste and preference. The fact that Agape also provides accessories was also seen as positive by focus group respondents.

The fact that Agape can offer the whole “retail” experience (including accessories and bridesmaid dresses) is seen as an important part of the wedding ritual by many consumers, as suggested by primary research.
According to Agape, service is its primary focus and it works hard to improve all the time. This is an important strength for Agape, in order to differentiate itself from competitors.

It is safe to say that Agape’s unique concept will provide it with a competitive advantage in this new market. It has successfully built a strong market presence to capture the attention of their target audience in the domestic market. Its strong experience curve, developed through several years domestically, is also a strength for Agape’s pursuit for international expansion.

7.8.1.2 Weaknesses

Every company has its weaknesses and it is important for the management to be aware of and always work towards minimising these. Firstly, it is important to discuss the fact that Agape has no direct competition in domestic market. This may lead to Agape getting “too comfortable” which could be a risk if a competitor was to emerge in the market suddenly (either from Norway or abroad). Getting too comfortable could also lead to Agape losing customer focus.

Secondly, another weakness Agape has is its lack of international experience and knowledge about foreign markets. Agape’s geographic concentration is currently in Norway exclusively, and there are a number of things to consider before entering a new market. A different approach to the consumers may be necessary due to cultural differences in the host country. Findings from primary research showed that UK consumers are not too enthusiastic about celebrities endorsing bridal wear. Agape has enjoyed great success in this area in Norway, but this might not have the same effect in the UK. This is important to be aware of. Lack of knowledge of the host country substantially hinders a successful entry into it.

Additionally, Agape focuses exclusively on women’s clothes and apparels. Absence in the men’s wedding wear segment might limit the company’s growth opportunities.
7.8.2 External Analysis

7.8.2.1 Opportunities

According to Mintel (2007), the number of UK marriages is forecast to rise. One of Agape’s strengths is that it offers a wide range of different wedding gowns, and as primary research suggests, there is a need for this in the UK market. Additionally, the romantic dream of the wedding fairy tale will continue to stay alive which means that the market is constant; there will always be a need for wedding gowns. There are also demographic indicators that show an increasing trend of working women which further results in the rise of AB’s.

Mintel (2007) data as well as primary research shows that the bridal market is not brand driven. If Agape chooses to enter the UK market, it will not have a disadvantage in being new to the customers; it is the design that counts. It is common to distribute through independent retailers in the UK market. Therefore, if Agape opened its own retail outlets it would differentiate it in a positive manner. The future of online presence is promising which further means that reaching and informing customers will be easier. Furthermore, the attention from celebrity weddings that are promoted on television and magazines has resulted in an increase in the market value.

7.8.2.2 Threats

Within the bridal market today there are alternative outfits to choose from. Direct competition is a reality if Agape decides to go abroad. There is also a rising trend of second-hand and recycled wedding dresses that might take the focus away from the traditional dress. Other competitors, such as high street trends (M&S, ASDA) have also entered the market. Additionally, the concept of couture is becoming increasingly popular. The average age of brides and population in general is rising, causing much stronger growth in non-traditional bridal wear than traditional. As Agape has had no real encounter with competition in the domestic market, its inexperience may pose as a threat when entering markets with a number of direct competitors.
<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strong position in domestic market</td>
<td>No direct domestic competitors</td>
</tr>
<tr>
<td>Wide product range</td>
<td>Absence in men's segment</td>
</tr>
<tr>
<td>Strong domestic experience curve</td>
<td>Lack of international experience</td>
</tr>
<tr>
<td>Service orientated</td>
<td>Lack of international knowledge</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
<tr>
<td>Emerging market</td>
<td>Non-traditional wedding wear increasing in popularity</td>
</tr>
<tr>
<td>Market forecast to grow due to increasing number of marriages</td>
<td>Direct competition suddenly a factor</td>
</tr>
<tr>
<td>Lack of brand importance</td>
<td>Ageing brides and population in general</td>
</tr>
<tr>
<td>Fragmented market</td>
<td>Strong competition from High Street</td>
</tr>
<tr>
<td>Celebrity weddings increase market value</td>
<td>Couture increasing in popularity</td>
</tr>
<tr>
<td>Demographic development</td>
<td></td>
</tr>
<tr>
<td>(increasing number of AB women)</td>
<td></td>
</tr>
<tr>
<td>Online presence</td>
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</tr>
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</table>
Chapter 8

Conclusions and Recommendations
8 RECOMMENDATIONS AND CONCLUSIONS

The findings of this report describe the UK bridal wear market as one that is extremely fragmented (a huge amount of small suppliers, with no clear market leaders). Most retailers (40%) in the market are independent, distributing gowns from a number of different suppliers. Bridal multiples (30%) and couture specialists (25%) account for what is almost of the rest of the market.

Although the largest suppliers are mainly large international firms, there is still a huge amount of smaller local suppliers, making the industry semi-global. Due to Agape’s small size and inexperience in international markets, we conclude that its current ability to internationalise is low, and recommend that it proceeds as planned by entering Sweden and Denmark first, due to the similarity of these markets to the domestic market. The experience gained from this expansion, we believe, can improve its ability to internationalise greatly. However, we recommend that a thorough analysis of the firm’s internal environment is conducted before making any such advances, to make sure that there is sufficient capital and human resources to facilitate a successful expansion.

When Agape eventually decides it is time to enter the UK market, it is recommended that it does so through franchising. This is due to the fact that it already has great experience in domestic franchising. However, a disadvantage of franchising is the limited possibility to control the franchisees’ operations.

A critical factor in the bridal market is that consultations and fittings are seen by over half of brides as an important part of the wedding process due to the high involvement and high risk involved. Customers expect top expertise and insight from salespersons, as well as the ability to perform all kinds of alterations to the dresses. It is therefore vital that Agape implements the expertise and level of service the customer expects in all its franchisees.

Women aged 18-34 (83%) and 35-44 (71%) are the most likely to wear a traditional wedding gown, thus these age groups should be prioritised. That is also the case with AB women. Due to the pricing of Agape’s gowns, BC1 would be a more suitable socio-economic target.
segment. Based on this, the following is an appropriate positioning statement for Agape to use in its UK expansion: For BC1 women aged 18-44, Agape is the bridal wear retailer that provides the widest range of choice and outstanding service, because their knowledge about each dress and how they can be altered is superior to that of any competitor.

From the findings of this report, it is concluded that Agape will not need to adapt its products when entering the UK market. However, seeing as the market entry may be years from now, some general knowledge of the new trends will be necessary. Furthermore, offering bridesmaid dresses and accessories under the same roof would be well received in the UK, according to the research.

The findings of this report show that UK brides do not associate Norwegian design with anything positive in particular. However, they were very positive towards Agape’s wide range of gowns, and the fact that many of their gowns had straps especially. Offering many different options on such elementary features for each design seems to be the one real way to differentiate the physical product. Franchise is the best option; there needs to be in-store competence as to how to perform these alterations. This can be provided by imposing clearly outlined guidelines on the franchisees.

Although celebrity endorsement has been proven to give results in the UK bridal wear market, the primary research suggests otherwise. This suggests that any effect celebrity endorsement has on the consumer is unconscious, and that straightforward celebrity endorsement (celebrities modelling the gowns) as used in Norway, would not be effective in the UK.

Bridal magazines are the most popular sources of bridal inspiration, and thus the most important communication channels. Word-of-mouth is growing in importance as a means of market communications. These two media will be the most important for Agape when entering the UK market.

The customers’ perceived value of Agape’s gowns is close to the same as the sales price, and in some cases, higher. This means that Agape could price their dresses slightly higher in the UK than in Norway, to cover the additional costs involved with the international expansion.
References and Bibliography
REFERENCES


BIBLIOGRAPHY


Appendices
### Appendix 1 – Time Plan

<table>
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<th>February</th>
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<td></td>
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</tr>
</tbody>
</table>

The students will be continuously supervised by Mr. Lawrence F. Bailey during this period, through personal meetings approximately twice a month.
### Recruitment Screener

**diefield Job Reference 8934 – Marriage Groups**

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Location</th>
<th>Session Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBC</td>
<td>6.15pm for 1.5 hours</td>
<td>Recruiters Home</td>
<td><strong>Group 1</strong>&lt;br&gt; 8 Respondents.&lt;br&gt;Female.&lt;br&gt;25 – 39 years old.&lt;br&gt;BC1.&lt;br&gt;4 recently married and 4 to be married.</td>
</tr>
<tr>
<td>TBC</td>
<td>8.00pm for 1.5 hours</td>
<td>Recruiters Home</td>
<td><strong>Group 2</strong>&lt;br&gt; 8 Respondents.&lt;br&gt;Female.&lt;br&gt;25 – 39 years old.&lt;br&gt;BC1.&lt;br&gt;4 recently married and 4 to be married.</td>
</tr>
</tbody>
</table>

**LOCATION:** Recruiters Home

**INCENTIVES:** £40 per respondent for 1.5 hours

**KEY CONTACT:** Rebecca Peck on 020 8245 8000
SPECIAL RECRUITER INSTRUCTIONS:
<Type in any special details here - don't use bold unnecessarily!>

OVERALL SCREENING CRITERIA:

**Background:**
- The end client, AGAPE is a Norwegian wedding dress company and are looking at doing a study with people that have recently married or planning to marry in the next 2 years

**Sample Criteria:**
- Respondents must be either planning to get married in the next 2 years and are currently planning their wedding OR have got married within the last 6 months
- All respondents must agree to one of the following statements;
  - “I am planning to get married in a wedding dress that is in the style of most Christian marriage ceremonies”
  - “I did get married in a wedding dress that is in the style of most Christian marriage ceremonies”
INTRODUCTION:
Hello. My name is __________ and I work for Indiefield. We’re conducting an important study about wedding dresses and would like to speak to you. Please be assured that we are not selling anything. This is bona fide market research. There are no right or wrong answers here - we are only interested in your opinions.

QA. First of all, have you ever attended a market research group discussion or market research interview?

<table>
<thead>
<tr>
<th>Yes</th>
<th>1</th>
<th>Continue</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>2</td>
<td>Quota / skip to QC</td>
</tr>
</tbody>
</table>

QB. When was the last time you participated in a market research discussion group or individual interview and what was it about?

<table>
<thead>
<tr>
<th>Date:</th>
<th>Thank &amp; Close if within last six months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Thank &amp; Close if on the same subject</td>
</tr>
</tbody>
</table>

QC. Do you, or does any member of your immediate family or close friends, work in any of the following industries?

<table>
<thead>
<tr>
<th>A market research company or department</th>
<th>1</th>
<th>Thank &amp; Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>An advertising agency or department</td>
<td>2</td>
<td>Thank &amp; Close</td>
</tr>
<tr>
<td>A public relations company or department</td>
<td>3</td>
<td>Thank &amp; Close</td>
</tr>
<tr>
<td>Any media, such as a TV station, a radio station, a magazine or a newspaper</td>
<td>4</td>
<td>Thank &amp; Close</td>
</tr>
<tr>
<td>None of these</td>
<td>5</td>
<td>Continue</td>
</tr>
</tbody>
</table>

Q1. Indicate the sex of the respondent. Don’t ask unless you really need to!
QUOTA: All respondents must be Female.

Q2. How old are you?

__________ years old

QUOTA: All respondents must be between 25 – 39 years old.

Q3a. Which one of these best describes your ethnic origin?

<table>
<thead>
<tr>
<th>Ethnic Origin</th>
<th>ID</th>
<th>Action</th>
</tr>
</thead>
<tbody>
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<td>White British</td>
<td>1</td>
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</tr>
<tr>
<td>White Other</td>
<td>2</td>
<td>Continue</td>
</tr>
<tr>
<td>Indian</td>
<td>3</td>
<td>Continue</td>
</tr>
<tr>
<td>Pakistani / Bangladeshi</td>
<td>4</td>
<td>Continue</td>
</tr>
<tr>
<td>Chinese</td>
<td>5</td>
<td>Continue</td>
</tr>
<tr>
<td>Other Asian</td>
<td>6</td>
<td>Continue</td>
</tr>
<tr>
<td>Black Caribbean</td>
<td>7</td>
<td>Continue</td>
</tr>
<tr>
<td>Black African</td>
<td>8</td>
<td>Continue</td>
</tr>
<tr>
<td>Other Black</td>
<td>9</td>
<td>Continue</td>
</tr>
<tr>
<td>Mixed Race</td>
<td>10</td>
<td>Continue</td>
</tr>
<tr>
<td>Other (write in)</td>
<td>11</td>
<td>Continue</td>
</tr>
</tbody>
</table>

Q3b. Where were you born?

<table>
<thead>
<tr>
<th>Birthplace</th>
<th>ID</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the UK</td>
<td>1</td>
<td>Continue</td>
</tr>
<tr>
<td>Outside the UK (write in)</td>
<td>2</td>
<td>Continue</td>
</tr>
</tbody>
</table>
Q3c. Where have you lived most of your life?

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Continue</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the UK</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Outside the UK (write in)</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

Q4. In order to interview households that represent all types of jobs, please tell me the occupation of the person with the largest income whether from employment, pensions, investments, state benefits or other sources? If you are not the largest income earner in your home, can you also tell me your profession?

Chief Wage Earner:

_______________________________________________

Respondent:

____________________________________________________

Please code Social Grade:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Thank &amp; Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>2</td>
<td>Continue</td>
</tr>
<tr>
<td>C1</td>
<td>3</td>
<td>Continue</td>
</tr>
<tr>
<td>C2</td>
<td>4</td>
<td>Thank &amp; Close</td>
</tr>
<tr>
<td>D</td>
<td>5</td>
<td>Thank &amp; Close</td>
</tr>
<tr>
<td>E</td>
<td>6</td>
<td>Thank &amp; Close</td>
</tr>
</tbody>
</table>

QUOTA: All respondents must be BC1.
Q5. Did you get married/are planning on getting married in a traditional white/ivory wedding dress (i.e. one in the style of most Christian ceremonies)?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>1</td>
<td>Continue</td>
</tr>
<tr>
<td>No</td>
<td>2</td>
<td>Thank &amp; Close</td>
</tr>
</tbody>
</table>

QUOTA: All respondents must have got married/are getting married in a traditional white/ivory wedding dress.

Q6. Have you got married in the last 6 months or are you going to get married in the next 2 years?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, I got married in the last 6 months</td>
<td>1</td>
<td>See Quota</td>
</tr>
<tr>
<td>Yes, I am going to get married in the 2 years</td>
<td>2</td>
<td>See Quota</td>
</tr>
<tr>
<td>No, I am neither going to get married or have got married</td>
<td>3</td>
<td>Thank &amp; Close</td>
</tr>
</tbody>
</table>

QUOTA: Please recruit 4 Respondents who have got married on the last 6 months and 4 respondents who are getting married in the next 2 years per group.

Q7. Is/Was this the first time you have been married?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>1</td>
<td>Continue</td>
</tr>
<tr>
<td>No</td>
<td>2</td>
<td>Continue</td>
</tr>
</tbody>
</table>

QUOTA: Record Details.

Only ask those that code 1 at Question 7

Q8. How many times have you been married before?
QUOTA: Record Details.

QX. And finally, if you were in a group discussion with a bunch of total strangers, how do you think you'd feel and behave?

<table>
<thead>
<tr>
<th>Response</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'd feel nervous and probably wouldn't say much</td>
<td>1 Thank &amp; Close</td>
</tr>
<tr>
<td>I'd enjoy meeting new people and would join in</td>
<td>2 Continue</td>
</tr>
<tr>
<td>I am not shy when in front of a crowd and would be outspoken and make an effort</td>
<td>3 Continue</td>
</tr>
<tr>
<td>I'd switch off if I found it boring</td>
<td>4 Thank &amp; Close</td>
</tr>
<tr>
<td>I'd feel a bit anxious but would try to join in</td>
<td>5 Thank &amp; Close</td>
</tr>
</tbody>
</table>

QUOTA: Only recruit respondents who are confident and willing to speak in the research.

INTERVIEWER:

Explain interview process very carefully and invite if the respondent fits the quota. Make sure the respondent knows what is expected of them and the type of research this is. Ensure you explain to the respondent that invitations are not transferable to anyone else.

Most importantly explain that they will be video and audio taped for research purposes only.
QY. Do you have any objections to being filmed and audio recorded?

<table>
<thead>
<tr>
<th>Yes</th>
<th>➔ THANK &amp; CLOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>➔ CONTINUE &amp; DOUBLE CHECK QUOTA</td>
</tr>
</tbody>
</table>

**RESPONDENT INFORMATION:**

Respondent name: 

Respondent address: 

Respondent postcode: 

Home number: 

Work number: 

Mobile number: 

Email: 

**INTERVIEWER DECLARATION:**

I confirm that this interview has been carried out by me and abides by the MRS Code of Conduct and that the respondent is not previously known to me. I have followed the instructions and asked all questions in full as required.

Signed: ___________________________ Date: ________________
### Appendix 3 – Focus Group 1 Respondent Details

#### 8934 - Marriage Groups

#### Group: 1

<table>
<thead>
<tr>
<th>Forename</th>
<th>Surname</th>
<th>Mobile Phone number</th>
<th>Gender</th>
<th>Age</th>
<th>SEG</th>
<th>QA</th>
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<tr>
<td>1 Nicola</td>
<td>Howe</td>
<td>07855 997 137</td>
<td>F</td>
<td>28</td>
<td>C1</td>
<td>2</td>
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<tr>
<td>2 Tracy</td>
<td>Finlay</td>
<td>07940 006 142</td>
<td>F</td>
<td>28</td>
<td>C1</td>
<td>2</td>
</tr>
<tr>
<td>3 Jamie</td>
<td>Burnell</td>
<td>07760 157 467</td>
<td>F</td>
<td>27</td>
<td>C1</td>
<td>2</td>
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<tr>
<td>4 Louise</td>
<td>Harris</td>
<td>07947 934 083</td>
<td>F</td>
<td>28</td>
<td>C1</td>
<td>2</td>
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<tr>
<td>5 Claire</td>
<td>Ellis</td>
<td>07939 136 740</td>
<td>F</td>
<td>32</td>
<td>B</td>
<td>2</td>
</tr>
<tr>
<td>6 Danielle</td>
<td>Inns</td>
<td>07515 367 052</td>
<td>F</td>
<td>28</td>
<td>B</td>
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<tr>
<td>7 Cheryl</td>
<td>Legrove</td>
<td>07732 061 842</td>
<td>F</td>
<td>25</td>
<td>C1</td>
<td>1</td>
</tr>
<tr>
<td>8 Elise</td>
<td>Goldstein</td>
<td>07976 432 405</td>
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<td>36</td>
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<table>
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<td>1</td>
</tr>
<tr>
<td>8</td>
<td>_</td>
<td>5</td>
<td>2</td>
<td>NO</td>
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<td>36</td>
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#### Q3c | Q4 | Q5 | Q6 | Q7 | Q8
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**Project Manager:** Rebecca Peck  
**Group Number:** 1  
**Date:** Monday 28th April  
**Time:** 6.15pm  
**Venue:** Recruiter home- Watford

Leeds Metropolitan University 2007/08
## Appendix 4 – Focus Group 2 Respondent Details

### indiefield 8934 - Marriage Groups

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**Project Manager:** Rebecca Peck  
**Group Number:** 2  
**Date:** Monday 28th April  
**Time:** 8.00pm  
**Venue:** Recruiter home- Watford  

Leeds Metropolitan University 2007/08  
XI
Appendix 5 – Focus Group Schedule

QUALITATIVE SCHEDULE

Hendrik Samdal
6 Winston Mount
Leeds
LS6 3JY

Thursday 10th April

Dear Hendrik

Re: Fieldwork Schedule for 8934 – Marriage Groups

Many thanks for booking indiefield to work on this study for you. This document is to confirm a few details with you about your fieldwork so you can see what we are delivering for you.

First day of fieldwork: TBC

Last day of fieldwork: TBC

Your schedule in detail:

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<td>4 recently married and 4 to be married.</td>
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**Your requirements in detail:**

**Background:**

- The end client, AGAPE is a Norwegian wedding dress company and are looking at doing a study with people that have recently married or planning to marry in the next 2 years
Sample Criteria:

- Respondents must be either planning to get married in the next 2 years and are currently planning their wedding OR have got married within the last 6 months
- All respondents must agree to one of the following statements;
  - “I am planning to get married in a wedding dress that is in the style of most Christian marriage ceremonies”
  - “I did get married in a wedding dress that is in the style of most Christian marriage ceremonies”

Please feel free to contact me to discuss your project. I am responsible for making sure this goes well for you and that things run smoothly for you. You can call me at anytime on 020 8245 8000.

All my very best,

Rebecca Peck
On behalf of Indiefield
Appendix 6 – Focus Group Topic Guide

Project Wedding Dress
Stine Remøy
Aleksander Gjostein
Henrik Samdal
Malin Schulze

Topic Agenda

1. Warm-up

2. The market
   - What do you consider to be the most important features when you are looking for a wedding dress?
   - How would you describe the difference between the traditional v. modern bridal dress?
   - Do people still prefer to have a traditional wedding dress, or do they lean towards more modern style?
   - How wide is the range of wedding dresses available nowadays?
   - Can you find the style of dress that you really want?

3. Service
   - How important is service when you buy a wedding dress?
   - What would you consider to be ideal service?
   - To what extent are your expectations fulfilled?

4. Brands
   - What brands of wedding dresses can you think of?
   - How important is branding when you choose your wedding dress?
   - And what about brands when you choose accessories to go with the dress? [PROBE: Shoes, veil, jewellery, purse etc.]
   - Would you use more than one brand?
[PROBE: For as many brands as possible]

- Why would you choose those particular brands?
- What factors are important in determining the brands you use?

5. Costs
- How much do people pay for a wedding dress nowadays?
- How do you feel about current prices?
- How do you judge value for money?

6. Influences
- How do you feel about the advertising within the bridal market?
- What would have the best effect on you?
- How do you feel about online shopping for bridal items?
- How important is the influence you get from family and friends?
- How does celebrity endorsement affect you?

7. Norwegian design
- What comes to mind when you think of Norwegian Design?
- How do you feel about Norwegian design on wedding dresses?
  [Show fabric samples]
  [ASK FOR EACH:]
- What are your impressions regarding this sample?
  [COMPARE ALL]

8. Agape
  [SHOW BROCHURES]
- What is your first impression when you look at these pictures?
  [PROBE: Ask specifically about pages 10, 28, 38 and 42]
- Would you consider buying this product?
- Why do you say that?
- What do you like about it?
• And what do you dislike about it?
• What particular advantages do you see in this product over the brands you are currently considering?
• How would you expect this product to be priced?
• Which celebrity would you see as appropriate to endorse Agape? [PROBE if necessary for a UK celebrity…]
• Agape also provides accessories such as, bridesmaid dresses matching the bride’s dress, including veil, shoes, purses, jewellery etc. and other gowns. With Agape you get it all at one place. How do you feel about that idea?
• Ask for any ‘last advice’ for Agape to introduce their products to the UK market.
Appendix 7 – Focus Group 1 – Abridged Transcript

1. The market:

   a. **Important features**: ‘the figure’, ‘the quality is important’, ‘the best I can have’, ‘the details’, ‘it must be comfortable’, ‘the way people treat you’, ‘having good customer service is so important’, ‘personal attention is important’, ‘the season you are getting married in’, ‘I take into consideration the weather’, ‘you do want to be a bit different don’t you’, ‘want the dress to reflect your personality’, ‘the material’

   b. **Modern/traditional wedding dress**: ‘I’m going more modern’, ‘I want to look back and think I could still wear that now’, ‘you want to look back and still think nice’, ‘you want it to be right’, ‘it’s like when you find your man, you don’t want to compromise’

   c. **Market today**: ‘there is and there is not’, ‘90% are strapless’, ‘can change the dresses but not completed’, ‘same stuff different materials’, ‘I don’t find enough different styles’, ‘there is not enough variation’, ‘criss-cross is better than zips, why can’t they make more dresses without zips’, ‘they are all very similar’

2. Service:

   a. **The importance of service**: ‘number one’, ‘if you don’t like them you won’t go to that shop’, ‘if not you will look elsewhere for the same dress’, ‘they should be feeding your ego’, ‘it does make a difference’, ‘they should have knowledge about different dresses’, ‘you need to feel comfortable with the person’, ‘they could not do it up’

3. Brands:
a. **The importance of brands**: 'not important', 'maybe there is an element with some branded dresses that are very well made', 'I didn’t even think about the names at all', 'as long as you feel fantastic in it', 'as long as you feel amazing'

b. **What brands comes to mind**: 'Primatcha', 'Mother of bride', 'Pronovias', 'Susan Netphol', 'Nicolere', 'Afriladely', 'Moirly', 'Tridelya'

4. **Costs**:

a. **Current prices**: 'some of them are ridicules', 'in an ideal world I would not spend more than £1500', 'depends on your budget', 'you give yourself a limit', 'every time I want an extra button they charge another hundred pounds'

b. **The value for money**: 'there is no value', 'its actually really frustrating', 'get rid of it', 'a bit of a joke'

c. **Sticking to the budget**: 'no', 'probably over', 'I think people always go a bit over', 'trying to stick to it as best as you can'

d. **Buying everything under the same roof**: 'depends on the shop', 'it’s fantastic if you can buy it on the same place', 'shoes are least important thing because nobody will see them', 'hypothetically; upstairs all the dresses, downs stairs a lot of shoes, and maybe another floor with hair accessories, that would be fantastic', 'sometimes it is nice to shop around', 'wedding shoes are wedding shoes'

5. **Influence**:
a. **Importance of the influence and how to approach the perfect dress:** ‘gather ideas from the magazines, you look at websites and then visit the stores’, ‘people I do trust’, ‘internet is not that useful’, ‘internet is great if you want information, but you can’t find the perfect dress on internet’, ‘I found the internet useful’, ‘you can’t beat recommendations’, ‘I prefer the magazines’, ‘a wedding fair is good for other things like accessories, but not the actual dress’

b. **Celebrity endorsement:** ‘it would never look the same on you’, ‘how can you tell they will look good on you’, ‘you have to try everything on’, ‘they look absolute disgusting’, ‘horrible’

6. **Norwegian Design:**

   a. **What comes to mind when thinking of Norwegian Design:** ‘simple’, ‘blond hair’, ‘elegant’, ‘plain & simple’, ‘boring’, ‘sometimes simple can be good’

   b. **What about Norwegian Design on wedding dresses:** ‘winter’, ‘jackets’, ‘elegant’, ‘snow queen from Narnia’, ‘cold’

7. **Agape:**

   a. **The first impression when looking at pictures from the catalogue:** ‘I could have sworn I have seen them’, ‘girl being blond all way trough’, ‘and there is straps’, ‘I love that’, ‘that makes sense’, ‘brochure is fantastic’, ‘It’s so amazing’, ‘lovely’, ‘we all would find something we like’, ‘they got it in different colours’, ‘what about the veils’, ‘these are not bridesmaid dresses’, ‘sometimes simple on bridesmaids is nice too’

   b. **Consider buying this product:**
i. page 10: ‘don’t like that’, ‘not something I would wear’

ii. page 28: ‘boring’, ‘they do not fit the model’

iii. page 38: ‘they do look too big’, ‘they do not fit her’, ‘the dress could actually be quite nice on someone it fits’

iv. page 42: ‘I like that’, ‘elegant in my opinion’

c. How important is accessories: he said he would come back to this, but he did not (only about accessories within the magazine and the importance of showing them at the end)

d. What sort of celebrity endorsement: ‘why should it be a celebrity’, ‘real brides’, ‘if they really wanted to use a celebrity I would prefer it was someone like Colleen (Wayne Rooney’s girlfriend)’, ‘if it was me and my company I would not use a celebrity’, ‘by having someone normal you don’t have that kind of judgement’, ‘I like Georgia (Taylor, actress)’, ‘I like her as well’


f. Do you think Agape would do it well in UK: ‘I think they would fit in’, it’s got a lot of different styles’, ‘this has given me ideas’, ‘a lot of different things in here I would like to look over again’, ‘everything seeing in the magazine they have in the store’, ‘took real women, would be different’, ‘the dresses hardly fit the models’, ‘it is really varied’, ‘I do think that if the shop was here people would have a look’, ‘evening dresses are lovely’

g. Advice: ‘good prices’, ‘try to get as much under one roof’, ‘have the separate as a brand instead of mixing them with the other’, ‘would be best if they had their own shop’, ‘looking forward to see them, when are they coming over’
Appendix 8 - Focus Group 2 – Abridged Transcript

8. **The market:**

   a. **Important features:** ‘the colour’, ‘want straps’, ’95 % of the dresses in the shops were strapless’, ‘the fabric’, ‘the detail’, ‘important where you’re getting married, will it fit in’, ‘the price’, ‘something that can cover your shoulders’, ‘can alter it and change it’, ‘you just got to try it on’

   b. **Modern/traditional wedding dress:** ‘I like traditional but not too meringue’, ‘half way’, ‘something in between’, ‘tradition with a kind of modern twist’, ‘the detail I think is more modern’, ‘I tried on a dress that was really modern and I didn’t feel like a bride’, ‘you want it to be different’, ‘just feeling like a bride’

   c. **Market today:** ‘I think local, it’s just easier’, ‘not so much choice’, ‘you think you’re getting a better choice in London but I found mine in Sheffield’ ‘now there is a shop in Northwood; Kiss the Bride, that it’s really good’, ‘I also found that the women in there knew what would suit your body type as well’, ‘cheaper to sort it locally’, ‘I looked at BHS websites, there is nothing traditional, it is very modern’, ‘M&S website is quite modern’, ‘have you been in the shops in BHS, they have a lot of traditional now’, ‘nicer to go to the smaller boutiques’, ‘different designer, but similar styles’

9. **Service:**

   a. **The importance of service:** ‘very important’, ‘we actually chose not to go to one shop because we had been treated appallingly’, ‘the relationship with the people is really important’, ‘reflection I can say is important’, ‘you want someone to be honest with you’, ‘but in a nice
way’, ‘you want to feel special’, ‘should be prepared to do some changes’, ‘I would have tried it on until I found one that was perfect’, ‘it’s a nice thought that you can make it different’, ‘if you change it a lot, is this the perfect dress for me’

10. Brands:

a. **The importance of brands:** ‘not important at all’, ‘did not even looked’, ‘was not even aware of any brand names’, ‘I was recommended to designers by friends’, ‘do I love this, do I not’

b. **What brands comes to mind:** he did not ask the question

11. Costs:

a. **Current prices:** he did not ask the any question

b. **The value for money:** he did not ask the question

c. **Sticking to the budget:** ‘very important’, ‘if I loved it enough I could have done that’, ‘when I went in they asked what I was looking to spend’

d. **Buying everything under the same roof:** ‘have stuff there so you can try it on’, ‘nice to have just one place to go back to’, ‘maybe they play on that because it is easier for you’, ‘if I could get everything under one roof I would’

12. Influence:

a. **Importance of the influence and how to approach the perfect dress:** ‘my figure’, ‘mine is financial’, ‘other peoples opinions’, ‘how you
felt when you tried it on’, ‘it’s important to me what people think’, ‘I would not bought anything before I was 100 % sure because you’re spending all that money’, ‘that second time you just know’ ‘magazines’, ‘friends that already have got married’, ‘most people have some ideas before they even start looking’, ‘talking to friends is helpful’, ‘when people are getting engaged the first thing friends and family do is to buy magazines for you’, ‘friends’ recommendations’

b. Celebrity endorsement: ‘I don’t think it’s necessary’, ‘its not going to look like that on me’, ‘that would be her dress, that would not feel like a dress that was made for me’, ‘I did not actually think that looking at the magazines through, I just think if I like it or not’, ‘if they have contributed to the design then that’s different’

13. Norwegian Design:


14. Agape:

a. The first impression when looking at pictures from the catalogue: ‘plain front’, ‘nice pictures as well’, ‘like that there is no bride’, ‘straps in it’, ‘you got some more choice’, ‘and price, you never see the price’, ‘the fabric different from the traditional?’, ‘nice selection of the sleeves’, ‘stunning’, ‘something for everyone’, ‘the pictures are very simple as well’, ‘big selection of style here’, ‘it seems to be using the same model
on loads of different style dresses’, ‘I like the continuity, you don’t look
at the person so much’, ‘I like it’, ‘would be nice to see the back of it’,
‘it’s good at the back ”my favourite in the back”, ‘quite nice’, ‘it needs to
be clear that you are not selling everything’, ‘tiaras could easily be lined
up’, ‘but too much is not a good thing either’, ‘if you see the tiara you
want to see it in the back as well’, ‘could always have bigger pictures’

b. Consider buying this product:
   i. page 10: ‘big one is nice’, ‘does not look like it fits her properly’,
   ‘I like that one’
   on one model’, ‘they are taking the basic press and shows it in
different ways and I think that is really good’, ‘shows what you
could have’
   iii. page 38: ‘you can’t see all of it’, ‘that is more a picture of her’,
   ‘should be able to see the full view of the dress’, ‘the fabric does
   not fit her properly’, ‘everything looks different on anyone
anyway, you need to try it on’
   iv. page 42: ‘that’s my favourite’, ‘I like that’, ‘that’s lovely’,
   ‘beautiful’, ‘it’s a nice dress’, ‘it’s a good picture’, ‘too traditional
for me’, ‘that’s a beautiful dress but not something I could wear
because of my figure’, ‘like the picture’, ‘nice and simple’

c. How important is accessories: ‘very important’, ‘they finish it off’, ‘you
got to get everything to tone and work well’, ‘jacket and vale are
important’, ‘nobody is going to see my shoes, as long as they are
comfortable’, ‘defiantly second to a dress’

d. What sort of celebrity endorsement: I think it can only be a good
thing if you know the person that wear the dresses’, ‘I don’t really mind
who is wearing the dress’, ‘you can dream about that they are getting
married as well’
e. **Price:** ‘expensive’, ‘maybe similar to Berketex, they are in the middle’, ‘love the idea that there are tons of dresses to look over’, ‘you can imagine them having a shop in town’, ‘I would say 1000 £’, ‘a couple of thousand’, ‘can’t see that any of these are over 2000£’, ‘these do look like they probably been made well but there has been some compromises’

f. **Do you think Agape would do it well in UK:** ‘it is quite impressive’, ‘I certainly want to visit this store’, ‘interesting’, ‘I think they would do it quite well’, ‘they are doing something different and that is what the market need’, ‘I think they are different’, ‘there is nothing in here that is not already in the market, but the fact that these have a brochure is the only thing different’, ‘I don’t think they offer anything extra over and above’

g. **Advice:** ‘I would say it’s own store’, ‘if they got a big selection and can fill a store’, ‘it’s quite unique’, ‘it looks as if it could hold itself, and it doesn’t need to be mixed with anything else’, ‘you got the same design but different tops to it, maybe if they do want to come into the market they need to build more on that’, ‘I would like to see other colour dresses for bridesmaids as well’
## Appendix 9 – Focus Groups Compared

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<td>‘the colour’, ‘I want straps’, ‘the fabric’, ‘the detail’, ‘important where you’re getting married, will it fit in’, ‘the price’, ‘something that can cover your shoulders’, ‘can alter it and change it’, ‘you just got to try it on’</td>
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<td><strong>Modern v traditional</strong></td>
<td>‘I’m going more modern’, ‘you want to look back and still think nice’, ‘you want it to be right’, ‘it’s like when you find your man, you don’t want to compromise’</td>
<td>‘I like traditional but not too meringue’, ‘half way’, ‘tradition with a kind of modern twist’, ‘the detail I think is more modern’, ‘I tried on a dress that was really modern and I didn’t feel like a bride’, ‘you want it to be different’</td>
</tr>
<tr>
<td><strong>Market today</strong></td>
<td>‘90% are strapless’, ‘can change the dresses but not completed’, ‘same stuff different materials’, ‘I don’t find enough different styles’, ‘there is not enough variation’, ‘criss-cross is better than zips, why can’t they make more dresses’</td>
<td>‘95 % of the dresses in the shops were strapless’, ‘I think local, it’s just easier’, ‘not so much choice’, ‘you think you’re getting a better choice in London but I found mine in Sheffield’, ‘cheaper to sort it’</td>
</tr>
<tr>
<td>Service</td>
<td>当地人， ‘我看了BHS网站，那里没有传统，很现代’， ‘M&amp;S网站很现代’， ‘你去过BHS的商店吗，他们现在有很多传统’， ‘更喜欢去小店’， ‘不同设计师，但相似风格’</td>
<td></td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>The importance of service</td>
<td>‘number one’， ‘如果你不喜欢它们，你不会去那家店’， ‘如果没有，你会去别的地方买相同的衣服’， ‘他们应该养活你的自尊’， ‘它确实有影响’， ‘他们应该对不同的衣服有了解’， ‘你需要感到和这个人舒适’</td>
<td></td>
</tr>
<tr>
<td></td>
<td>‘非常重要’， ‘我们实际上选择不去一家店，因为我们被对待得非常糟糕’， ‘和人们的关系非常重要’， ‘我可以这么说非常重要’， ‘你想要诚实’， ‘但以一种愉快的方式’， ‘你想要感到特别’， ‘应该准备好做一些改变’</td>
<td></td>
</tr>
<tr>
<td>Brands</td>
<td>‘不重要’， ‘可能有一个元素与一些有名的衣服有关，这些衣服做得很精致’， ‘我没有想过这些名字’， ‘只要你觉得满意’， ‘我不太看’， ‘甚至没有意识到任何品牌名称’， ‘我被朋友推荐给设计师’， ‘我应该’</td>
<td></td>
</tr>
<tr>
<td>The importance of brands</td>
<td>‘不重要’， ‘也许有一个元素与一些有名的衣服有关，这些衣服做得很精致’， ‘我没有想过这些名字’， ‘只要你觉得满意’， ‘我不太看’， ‘甚至没有意识到任何品牌名称’， ‘我被朋友推荐给设计师’， ‘我应该’</td>
<td></td>
</tr>
<tr>
<td></td>
<td>‘不重要’， ‘没有看过’， ‘没有意识到任何品牌名称’， ‘我被朋友推荐给设计师’， ‘我会’</td>
<td></td>
</tr>
</tbody>
</table>

Leeds Metropolitan University 2007/08  XXVIII
<table>
<thead>
<tr>
<th>Costs</th>
<th>fantastic in it’</th>
<th>love this, do I not’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sticking to the budget</td>
<td>‘no’, ‘probably over’, ‘I think people always go a bit over’, ‘trying to stick to it as best as you can’</td>
<td>‘very important’, ‘if I loved it enough I could have done that’, ‘when I went in they asked what I was looking to spend’</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Influence</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Importance of the influence</td>
<td>‘you can’t beat recommendations’</td>
</tr>
</tbody>
</table>

<p>| How to approach the perfect dress | ‘gather ideas from the magazines, you look at websites and then visit the stores’, ‘people I do trust’, ‘internet is not that useful’, ‘internet is great if you want information, but you can’t find the perfect dress on internet’, ‘I found the internet useful’, ‘you can’t beat recommendations’, ‘I prefer’ | ‘magazines’, ‘friends that already have got married’, ‘most people have some ideas before they even start looking’, ‘when people are getting engaged the first thing friends and family do is to buy magazines for you’, ‘friends’ recommendations’ |</p>
<table>
<thead>
<tr>
<th><strong>Celebrity endorsement</strong></th>
<th><em>‘it would never look the same on you’, ‘how can you tell they will look good on you’, ‘you have to try everything on’, ‘they look absolute disgusting’, ‘horrible’</em></th>
<th><em>‘I don’t think it’s necessary’, ‘it’s not going to look like that on me’, ‘that would be her dress, that would not feel like a dress that was made for me’, ‘I did not actually think that looking at the magazines through, I just think if I like it or not’, ‘if they have contributed to the design then that’s different’</em></th>
</tr>
</thead>
</table>

*the magazines’*
| The first impression when looking at pictures from the catalogue | ‘girl being blond all way trough’, ‘and there is straps’, ‘I love that’, ‘that makes sense’, ‘brochure is fantastic’, ‘It’s so amazing’, ‘lovely’, ‘we all would find something we like’, ‘they got it in different colours’, ‘what about the veils’, ‘these are not bridesmaid dresses’, ‘sometimes simple on bridesmaids is nice too’ | ‘straps in it’, ‘and price, you never see the price’, ‘nice selection of the sleeves’, ‘stunning’, ‘something for everyone’, ‘big selection of style here’, ‘it seems to be using the same model on loads of different style dresses’, ‘I like the continuity, you don’t look at the person so much’, ‘would be nice to see the back of it’, ‘tiaras could easily be lined up’, ‘if you see the tiara you want to see it in the back as well’, ‘could always have bigger pictures’ |

| Consider buying these products: |  |

| - page 10 | ‘don’t like that’, ‘not something I would wear’ | ‘big one is nice’, ‘does not look like it fits her properly’, ‘I like that one’ |

| - page 28 | ‘boring’, ‘they do not fit the model’ | ‘I like this’, ‘I like the jacket’, ‘simple’, ‘put all dresses on one model’, ‘they are taking the basic press and shows it in different ways and I think that is really good’, ‘shows what you could have’ |

<p>| - page 38 | ‘they do look too big’, ‘they do | ‘you can’t see all of it’, ‘that' |</p>
<table>
<thead>
<tr>
<th><strong>Celebrity endorsement</strong></th>
<th>not fit her’, ‘the dress could actually be quite nice on someone it fits’</th>
<th>is more a picture of her’, ‘should be able to see the full view of the dress’, ‘the fabric does not fit her properly’, ‘everything looks different on anyone anyway, you need to try it on’</th>
</tr>
</thead>
<tbody>
<tr>
<td>- <strong>page 42</strong></td>
<td>‘I like that’, ‘elegant in my opinion’</td>
<td>‘that’s my favourite’, ‘I like that’, ‘that’s lovely’, ‘beautiful’, ‘it’s a nice dress’, ‘it’s a good picture’, ‘too traditional for me’, ‘that’s a beautiful dress but not something I could wear because of my figure’, ‘like the picture’, ‘nice and simple’</td>
</tr>
<tr>
<td><strong>Accessories</strong></td>
<td>why should it be a celebrity’, ‘real brides’, ‘if they really wanted to use a celebrity I would prefer it was someone like Colleen (Wayne Rooney’s girlfriend)’, ‘if it was me and my company I would not use a celebrity’, ‘by having someone normal you don’t have that kind of judgement’, ‘I like Georgia (Taylor, actress)’, ‘I like her as well’</td>
<td>I think it can only be a good thing if you know the person that wear the dresses’, ‘I don’t really mind who is wearing the dress’, ‘you can dream about that they are getting married as well’</td>
</tr>
<tr>
<td></td>
<td>he said he would come back to this, but he did not (only about accessories within the magazine)</td>
<td>‘very important’, ‘they finish it off’, ‘you got to get everything to tone and work’</td>
</tr>
<tr>
<td><strong>Agape</strong></td>
<td></td>
<td></td>
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<tr>
<td>-----------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>and the importance of showing them at the end)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>well’, ‘jacket and vale are important’, ‘nobody is going to see my shoes, as long as they are comfortable’, ‘defiantly second to a dress’</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Buying everything under the same roof</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>‘depends on the shop’, ‘it’s fantastic if you can buy it on the same place’, ‘hypothetically; upstairs all the dresses, downs stairs a lot of shoes, and maybe another floor with hair accessories, that would be fantastic’, ‘sometimes it is nice to shop around’</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‘have stuff there so you can try it on’, ‘nice to have just one place to go back to’, ‘if I could get everything under one roof I would’</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Price</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>‘£1200’, ‘around £1000 - £1500’, ‘£1000’</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‘expensive’, ‘maybe similar to Berketex, they are in the middle’, ‘I would say 1000 £’, ‘a couple of thousand’, ‘can’t see that any of these are over 2000£’, ‘these do look like they probably been made well but there has been some compromises’</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Do you think Agape would do it well in UK</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>‘I think they would fit in’, ‘it’s got a lot of different styles’, ‘this has given me ideas’, ‘a lot of different things in here I would like to look over again’, ‘I do think that if the shop was here people would have a look’</td>
<td></td>
<td></td>
</tr>
<tr>
<td>‘I certainly want to visit this store’, ‘interesting’, ‘I think they would do it quite well’, ‘they are doing something different and that is what the market need’, ‘there is nothing in here that is not”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advice</td>
<td>‘good prices’, ‘try to get as much under one roof’, ‘have the separate as a brand instead of mixing them with the other’, ‘would be best if they had their own shop’, ‘looking forward to see them, when are they coming over?’</td>
<td>‘I would say it’s own store’, ‘if they got a big selection and can fill a store’, ‘it’s quite unique’, ‘it looks as if it could hold itself, and it doesn’t need to be mixed with anything else’, ‘you got the same design but different tops to it, maybe if they do want to come into the market they need to build more on that’</td>
</tr>
</tbody>
</table>

| already in the market, but the fact that these have a brochure is the only thing different’, ‘I don’t think they offer anything extra over and above’ |
Appendix 10 – Socio-economic groups

Socio-economic groups are based on the head of household or chief income earner and are defined as follows:

<table>
<thead>
<tr>
<th>Socio-economic group</th>
<th>Occupation of chief income earner</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Higher managerial, administrative or professional</td>
</tr>
<tr>
<td>B</td>
<td>Intermediate managerial, administrative or professional</td>
</tr>
<tr>
<td>C1</td>
<td>Supervisory or clerical, and junior managerial, administrative or professional</td>
</tr>
<tr>
<td>C2</td>
<td>Skilled manual workers</td>
</tr>
<tr>
<td>D</td>
<td>Semi and unskilled manual workers</td>
</tr>
<tr>
<td>E</td>
<td>All those entirely dependent on the state long term, through sickness, unemployment, old age or other reasons</td>
</tr>
</tbody>
</table>

**Retired persons** who have a company pension or private pension, or who have private means are graded on their previous occupation.

**Students** in higher education living at home are graded on the occupation of the head of the household. Students living away from home are graded C1 (no account is taken of casual or vacation jobs).

Source: Mintel (2007)
Appendix 11 – GB Population Profile

Population profile
GB (England, Scotland and Wales) population profile, by demographic group, 2003
Base: adults aged 15+

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>100</td>
</tr>
<tr>
<td>Men</td>
<td>49</td>
</tr>
<tr>
<td>Women</td>
<td>51</td>
</tr>
</tbody>
</table>

**Age group:**

<table>
<thead>
<tr>
<th>Age</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-19</td>
<td>7</td>
</tr>
<tr>
<td>20-24</td>
<td>8</td>
</tr>
<tr>
<td>25-34</td>
<td>18</td>
</tr>
<tr>
<td>35-44</td>
<td>19</td>
</tr>
<tr>
<td>45-54</td>
<td>16</td>
</tr>
<tr>
<td>55-64</td>
<td>13</td>
</tr>
<tr>
<td>65+</td>
<td>19</td>
</tr>
</tbody>
</table>

**Socio-economic group:**

<table>
<thead>
<tr>
<th>Group</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>24</td>
</tr>
<tr>
<td>C1</td>
<td>28</td>
</tr>
<tr>
<td>C2</td>
<td>21</td>
</tr>
<tr>
<td>D</td>
<td>18</td>
</tr>
<tr>
<td>E</td>
<td>10</td>
</tr>
</tbody>
</table>

Source: Mintel (2007)
Appendix 12 – List of Competitors
Leading bridal wear suppliers to the UK market, 2007

INDEPENDENT SUPPLIERS

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Country</th>
<th>Designation</th>
<th>Known for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alfred Angelo</td>
<td>US</td>
<td>Designer, Global</td>
<td>BridalPluss range (20W-32W), Destiny Collection for ceremonies abroad</td>
</tr>
<tr>
<td>Maggie Sottero</td>
<td>Australia</td>
<td>label</td>
<td>400 retailers in the UK, Avant-garde styling and reasonable priced glamour and Destinations Design for weddings abroad</td>
</tr>
<tr>
<td>Sincerity</td>
<td>US</td>
<td>US label</td>
<td>Supplying American and European markets, their mix of contemporary and traditional design</td>
</tr>
<tr>
<td>Ian Stuart</td>
<td></td>
<td>Awarded UK designer, Background from Sincerity</td>
<td></td>
</tr>
</tbody>
</table>
**Amanda Wyatt**  
UK designer  
Her daughters design incorporated in the business

**Known for:** 3 collections aimed at mass market but still segmented

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**Berketex Brides**  
UK supplier  
Aim at mass market

**Known for:** their exclusive design from David Emmanuel, wedding dress designer of Princess Diana.

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**Pronovias**  
Spanish

---

**Known for:** innovative design inspired by music and theatre. Their "Catwalk Collection", luxurious fabrics, textures and colours.
<table>
<thead>
<tr>
<th>Supplier/retailer</th>
<th><a href="http://www.pronovias.com">www.pronovias.com</a></th>
<th>Distributes to over 100 outlets in the UK</th>
<th>Claims 5% of the global bridal wear market</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Known for:</strong></td>
<td></td>
<td></td>
<td>Valentino Design</td>
</tr>
<tr>
<td><strong>Pronuptia</strong></td>
<td><a href="http://www.pronuptia.com">www.pronuptia.com</a></td>
<td>One of the largest bridal brands worldwide</td>
<td>Franchise system</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Store holds Pronuptia label dresses as well as other designers.</td>
</tr>
<tr>
<td><strong>COUTURE LABEL</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Vera Wang</strong></td>
<td><a href="http://www.verawang.com/bridal">www.verawang.com/bridal</a></td>
<td>One of the worlds largest couture labels</td>
<td>Average price per gown $8000</td>
</tr>
<tr>
<td><strong>Other couture labels</strong></td>
<td></td>
<td>Includes Oscar de la Renta (at Brown Brides) and Valentino (at Pronovias)</td>
<td></td>
</tr>
</tbody>
</table>
## RETAILER OWN-LABEL (high street stores)

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Description</th>
</tr>
</thead>
</table>
| Marks and Spencer | Launched collection of wedding dresses in 2007  
www.marksandspencer.com  
Accessories also available  
Positioned as offering stylish and contemporary design with usual M&S quality  
Available online |
| Asda | Launched collection of wedding dresses in 2006  
www.asda.co.uk  
£ 60 per gown  
Sold quickly |
| BHs | Established in the bridal wear market  
www.bhs.co.uk  
Offering full range of bridal outfits including accessories  
Dresses available at price points £65 - £180 |
| H & M | 100 limited edition dresses by Viktor & Rolf launched in 2006.  
www.hm.com  
Priced at £220  
Sold out within a week |

**Source:** Mintel (2007)
Appendix 13 – E-mail interview

Hello!
We are a group of business students studying at Leeds Metropolitan University, currently undertaking a research project concerning the wedding dress market in the UK.

We were hoping that you could help us by answering a few questions regarding the above mentioned topic. It will be of great help to us and we will very much appreciate it if you could find the time to answer the following questions:

1. What would you say is the average price for a wedding dress nowadays?
2. In your opinion, is it common for customers to buy accessories as well as the wedding dress from the same store?
3. What are the current trends in the market?
4. Which features appear to be most important to the customers? (e.g. modern vs. traditional, zips vs. criss-cross, straps vs. strapless, quality etc.)

Thank you!

Sincerely,

Malin Schulze
Stine Remoy
Henrik Samdal
Aleksander Gjostein