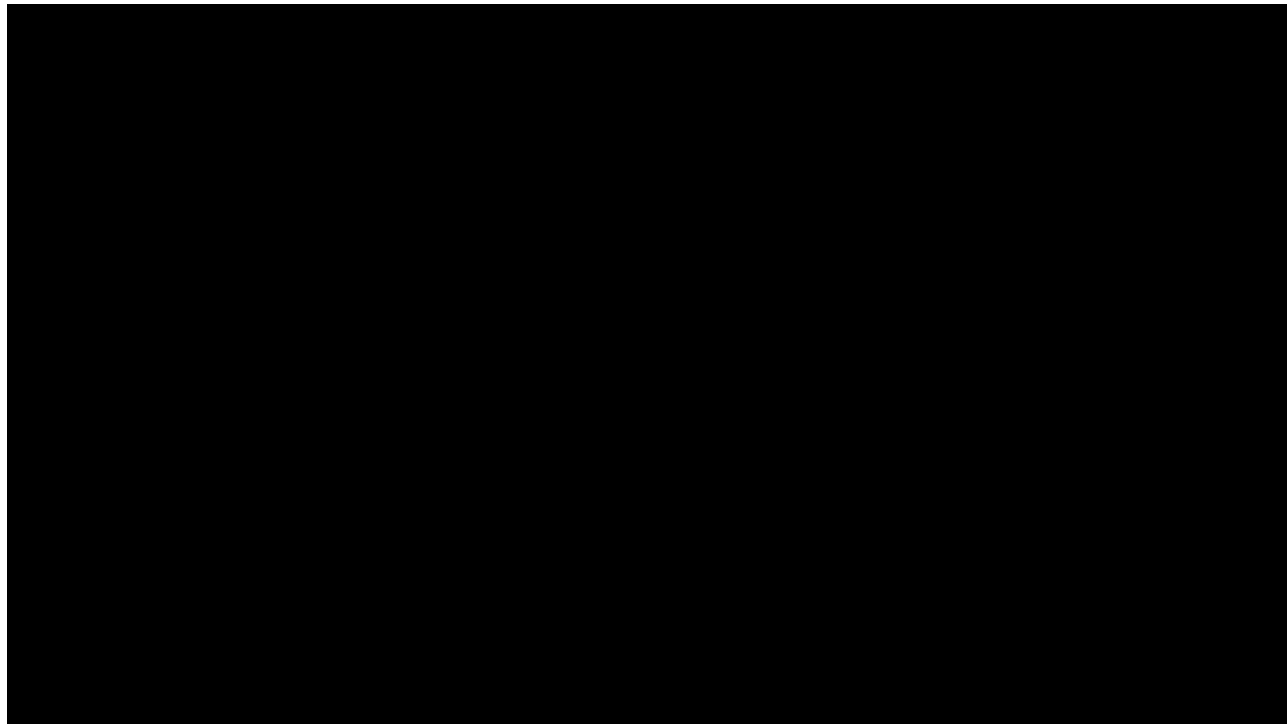




Michael Devlyn
EVP Retail
Devlyn Group

- **Devlyn Group description**
- **Main Strategies for Growth**
- **Coping with technology change to better connect with customers**
- **Q&A**

- **Founded in 1936 the Devlyn group will turn 80 years in 2016**
- **Today the largest privately owned retail optical Group in the world and the market leader in Mexico**
- **With a network of 1200 plus opticals serves over 200,000 customers every month in Mexico, Central America and very recently in the USA**
- **The Group is the main operator of lease department optical stores within Big Box retailers in Mexico, all of which account for 700 of its 1200 opticals.**



Segmentation

Stand Alone

High end

Lease Department



Mass Market

Organic and M&A

Organic- Avg 50 stores per year



Through M&A

Oct 2014 largest transaction in the Mexican Market place merging 300 plus opticals.

Strategic JVs



Devlyn Optical USA- Luxottica Retail USA
Pilot Test 10 stores in CA & TX



Centauro ISES
First nationwide vision care plan in Mexico

● **sunglass hut**

SGH Mexico
Devlyn Group- Luxottica SPA
160 stores nationwide



- **Coping with technology change to better connect with customers**

From technology in our products and services to technology around us to connect with customers

How will “the internet of things” and other technologies accelerate how we differentiate to capture customer preferences and loyalty

Devlyn is exploring innovations in 6 main areas

- Optical Lay out**
- Self eye-test screening**
- Product assortment/delivery**
- Made to order process**
- CRM and loyalty programs**
- Payment options and speed**