

September 2018

THE EYEGLOSS CONSUMER:

Generational Shopping Behaviors toward
Transitions® Light Intelligent Lenses™

Research Presented By:

Transitions™

CGK THE CENTER FOR
Generational Kinetics®

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A WORD FROM THE AUTHORS

Many wearers, regardless of age or generation, enjoy shopping for new eyeglasses. The experience of combining lenses and frames offers an opportunity to display unique expressions of their personality and style. They feel that the right pair of eyeglasses enhances their public persona and can even make them look stylish or feel smarter.

Even so, selecting a new pair of eyeglasses is a complex sequence of choices and decisions. On top of this, younger generations shop and make decisions very differently than the older consumers.

Now is the ideal time for eye care professionals to get ahead of Millennial and Gen X trends as more and more of these consumers become first time wearers and bring their generational perception to the eyeglass experience.

Going forward, it will be imperative for the eye care industry to understand the next generation of consumers and adapt to meet their needs in the way they're expecting. But, the opportunity is tremendous for eye care professionals who take the time to recognize new trends and make the effort to reach out to younger consumers.

Transitions Optical and The Center for Generational Kinetics partnered on this research to uncover exactly what these trends look like and how eye care professionals can appeal to Gen X and Millennial consumers.

We are excited to share these groundbreaking national research findings with you.

To schedule a media interview about the study and its findings, please contact customer-service@transitions.com.

~Transitions Optical and The Center for Generational Kinetics



CUSTOMER JOURNEY: HOW & WHY THEY BUY EYEGLASSES

THE SHOPPING EXPERIENCE

Almost half of all wearers enjoy the experience of shopping for new eyeglasses. **However, boomers rate this experience as slightly more enjoyable or easy than Millennials and Gen X.**

This statement is underscored by 21% of Millennials and Gen X who said they feel intelligent or smart when they put on their glasses. Millennials are also more likely than other generations to say they feel attractive and cool when they put on their glasses.

Considering aspects that would improve their shopping experience (from the time they walk in the door for the eye exam until they leave the practice or store), nearly half of eyeglass wearers say the eyeglass shopping experience would be improved by clear and upfront costs and good frame selection.

Additionally, nearly half of wearers also said clear and upfront costs make eyeglass shopping more enjoyable, followed by having a good selection of frames.

“I AM INTERESTED IN DESIGN AND LOVE SEEING THE LATEST STYLE OF GLASSES. ALSO, THE EYEGLOSS STORE IS A RELAXING ENVIRONMENT AND THE OPTOMETRIST IS SO ACCOMMODATING.”

“I HAVE SOCIAL ANXIETY AND I FEEL EMBARRASSED TRYING ON GLASSES OVER AND OVER. I FEEL RUSHED TO JUST GRAB A PAIR AND GET OUT.”

BOTTOM LINE:

Shopping for eyeglasses is an especially enjoyable experience for Boomer eyeglass wearers. Selecting new eyeglasses enhances the way individuals feel about themselves but, there are opportunities to improve the experience by providing upfront, transparent information about costs and providing broader in-store selections and having an eye care professional they know and trust.

THE EYEGLASS SHOPPING EXPERIENCE IS ENJOYABLE FOR ALL:



PURCHASE INFLUENCES

As with most larger purchase decisions, cost comes up right away with eyeglasses. In fact, affordability ranks highest among factors that influence decisions to buy new eyeglasses. Among all wearers, **71% report cost the primary driver and 62% rate eye care professional recommendation as the second most important factor influencing their choice.**

Evaluating these factors by generation, **cost is the top consideration for both Millennials and Gen X when buying a new pair of eyeglasses.** However, cost and convenience are less important to Millennials than to Gen X. Millennials are more concerned about coolness than Gen X. Overall, Millennials are especially influenced by cost related factors (price, insurance, promotions), while Boomers are the least concerned with these elements.

Comments from the survey suggest that aside from expense and lack of affordability (the biggest cost-related disconnectors) consumers sometimes feel pressured to buy more expensive options and are frustrated by the lack of transparency in pricing and hidden extras.

While cost represents the single most important consideration in both the decision to buy new frames and selecting specific lenses, it is an influential driver from the other side as well. Spouses carry a lot of influence in eyeglass decisions. Millennials in particular love a good deal with **57% saying that a special promotion influences their decision to purchase. And, 49% of Gen X agrees.**

**“THE ONLY
GLASSES
I LIKE ARE
IN THE HIGH
PRICED SECTION.
THEN YOU RING UP
THE PRICE AND YOU
HAVE TO PAY FOR ALL
HIDDEN EXTRAS.”**

Eyeglass shopping is not only impacted by static forces such as cost or insurance. Other people also have a great deal of influence on purchase decisions as eyeglass selections are rarely made by the wearer alone. Eyeglass consumers glean a lot of input from those around them, most often in relation to style. **In fact, 58% of wearers said eyecare professionals have the most influence on eyeglass selection decisions. 52% said spouse/significant other can influence eyeglass selection decision.**

AND WHERE ARE THESE OUTSIDE OPINIONS COMING FROM?

Eye care professionals and spouses have the greatest influence on wearers' purchase decisions.



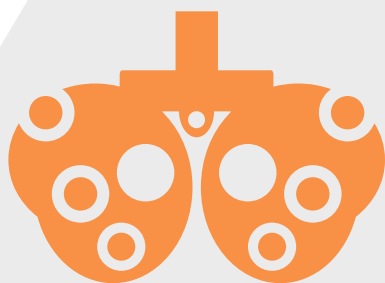
24%
FRIENDS



33%
IMMEDIATE FAMILY



52%
**SPOUSE/
SIGNIFICANT OTHER**



58%
EYECARE PROFESSIONALS

BOTTOM LINE:

While affordability may be the strongest influencer on purchase decisions it is not the only consideration. Style, recommendations by eye care professionals, and the opinion of special people like a spouse or other significant individual all impact choice and buying decisions.



TRANSITIONS[®] BRAND PERCEPTIONS

TRANSITIONS® LENSES HAVE SOLID BRAND RECOGNITION

Across the board, both eyeglass wearers and eyeglass non-wearers of all ages recognize the *Transitions* brand and express a more positive impression of *Transitions* lenses than of non-specific photochromic lenses.

Overall, *Transitions* lenses have a more favorable standing than photochromic lenses and this is true for all types of wearers; heavy and light eyeglass wearers, and across generations. Forty-nine percent of all eyeglass wearers have a positive impression of *Transitions* lenses, going as high as 52% for men and 48% for heavy eyeglass wearers (wear their glasses or more hours per day).

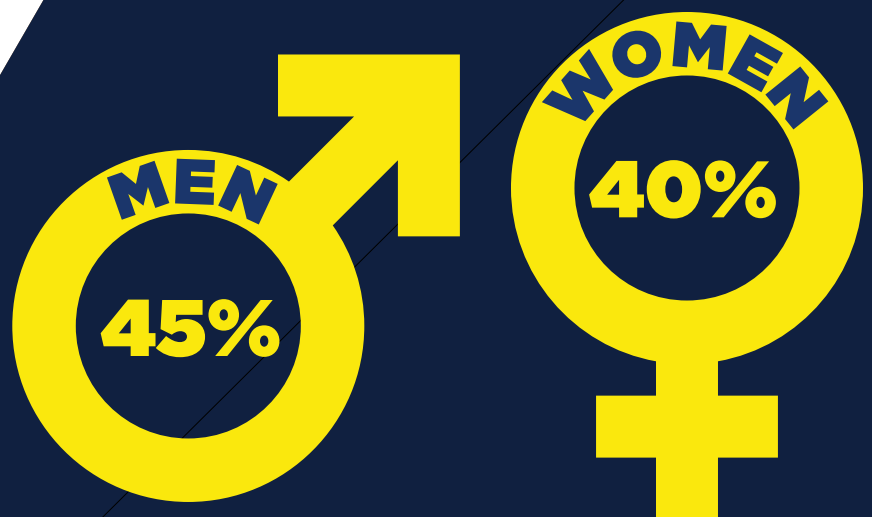
Both **Gen Z** and Millennials are equally likely to have heard of photochromic lenses and have an interest in trying them (27%). **But, interest levels for all eyeglass wearers increase notably if they consider *Transitions* lenses over just the idea of photochromic lenses. Over 40% of all wearers would be interested in trying *Transitions* lenses and men (45%) are more likely than women (40%) to try them.**

INCREASED INTEREST IN TRANSITIONS® LENSES

41% MILLENNIALS

42% GEN X

42% BOOMERS



BOTTOM LINE:

Transitions lenses not only enjoy wide recognition among eyeglass wearers, but the brand has more positive impression than the concept of photochromic lenses alone among all of these groups. Further, there is stronger interest to try *Transitions* lenses for all wearers compared to photochromic lenses, most notably Gen X and Boomers are the highest at 42%.

REASONS TO TRY TRANSITIONS® LENSES

Across generations, the ease associated with wearing *Transitions* lenses is the top reason for choosing them. **Hassle-free life and eye health are the most valued benefits of *Transitions* lenses.** Boomer wearers rated eye health highest at 38% while 30% of Gen X and 33% Millennials noted hassle-free as the top reason they like *Transitions* lenses.

The ability to protect the health of their eyes both indoors and out is an important factor in the *Transitions* lenses purchasing decision. In fact, one in three (32%) of eyeglass wearers rated this as important, and just **over half of Gen X eyeglass wearers selected eye health protection as a top reason for liking *Transitions* lenses.**

Sixteen percent of Millennials like *Transitions* lenses because they have a friend who wears them and really likes them. This is almost twice as many as Gen X (9%) and Boomers (8%).

When it comes to trying *Transitions* lenses, eyeglass wearers are most influenced by the recommendations of eye care professionals, significantly more so than anyone else—including their spouse.

Almost half of Millennials (49%) and Gen X (46%) would absolutely be convinced to try *Transitions* lenses if they were recommended by an eye care professional.



58%
GEN X

LIKE REDUCED HASSLE OF CHANGING FROM SUNGLASSES TO RX



48%
GEN X

WANT EYE HEALTH PROTECTION INDOORS AND OUTDOORS

BOTTOM LINE:

Consumers recognize the value of convenience and a hassle-free lifestyle. They appreciate how *Transitions* lenses offer the freedom of not having to change eyeglasses every time they go in and out. Wearers also concerned with the health of their eyes and want to choose **lends** features that can contribute to improved eye health. Finally, all generations value the opinion of eye care professionals. The combination of convenience, health and professional recommendations is a powerful driver toward *Transitions* lenses.



INSIGHTS AND STRATEGIES

DECISION DRIVERS

There is often uncertainty associated with how well they will work, and whether or not they will fit the wearer's style and self-image. This resistance can be dramatically reduced by offering buyers a trial period or a money back guarantee. **An astounding 8 out of 10 Millennial wearers would try *Transitions* lenses if they could use them free for one week!**

A trial period is also a huge lever for driving *Transitions* lens purchases. For in-store purchases, more than 4 out of 10 Millennial and Gen X wearers indicated that a 30-day trial period would convince them to purchase *Transitions* lenses. That level of interest holds for online purchases too and actually increases to 5 out of 10 for Millennial wearers and 6 out of 10 for Gen X and Boomer wearers.

Eye care professionals hold tremendous sway. Not only are they among the strongest positive influencers on the choice to try *Transitions* lenses, they also have the most power to discourage *Transitions* lenses. **An eye care professional recommendation would convince half of eyeglass wearers to try *Transitions* lenses.**

Recommendations from a spouse, significant other, or immediate family member are also very convincing across generations.



50%
will absolutely try if
**RECOMMENDED
BY AN EYE CARE
PROFESSIONAL**

50%
will not try if **DISCOURAGED
BY AN EYE CARE
PROFESSIONAL**

BOTTOM LINE:

Patients rely on their eye care professional to recommend the lens options that are right for them. The first step is for eye care professionals to bring up *Transitions* lenses in the conversation. Then, explaining advancements in technology and helping style *Transitions* lenses with the right frames, can diminish any consumer uncertainty or negative influences. Finally, offering first time *Transitions* lens wearers a trial period or a money-back guarantee is a powerful incentive to try them.



RESEARCH CONCLUSIONS

Purchasing new eyeglasses is more than economic exercise. It involves achieving a balance between subtle influences. Eyeglasses reveal our self-image, involve personal relationships, reflect the opinions of professionals, and affect the health of our eyes. The decision is further complicated by the fact that most people rely on glasses for a large portion of their day.

Getting more younger eyeglass wearers to buy *Transitions* lenses eye care professionals to make them comfortable with the idea that *Transitions* lenses are stylish as well as hassle-free, emphasize the value they represent, stress the eye health benefits, and reduce the risk associated with trying something new and different.

HERE ARE FOUR KEY TAKEAWAYS FROM THE NATIONAL STUDY TO MAKE THE MOST OF THIS OPPORTUNITY:

- 1. 74% of Millennial wearers would try *Transitions* lenses if they could wear them for a week for free.** There is a risk associated with purchasing a lens for the first time, and it is a risk that potentially remains for the life of the eyeglasses. Offering a trial period or a money back guarantee goes a long way to overcoming this concern as an obstacle to choosing *Transitions* lenses.
- 2. ECPs should strive to provide transparent information about costs and explain the value of what the patient is getting.** Some consumers find eyeglasses to be expensive or cost prohibitive. They see a wide range of prices for eyeglasses, but there is low understanding of why there is such a range. They also don't always understand the value of the different parts of their eyeglasses; they see these as "hidden expenses." Explaining all the benefits they are getting for their eyeglasses will help them understand the value. Patients look to the ECP to guide them through this non-routine purchase and put the expense into perspective, by showing them what's important to their vision, eye health and style.
- 3. *Transitions* lenses offer wearers a powerful combination of benefits that can only be realized in whole.** Not surprisingly, affordability is the primary decision driver for eyeglass lens purchases. But, encouraging buyers to focus on overall value moves them beyond simple price comparisons. *Transitions* lenses offer eyeglass wearers high value especially if they are going to rely on a single pair of prescription glasses most of the time. *Transitions* lenses also provide the highest degree of hassle-free wear since people don't need to always carry a pair of sunglasses, avoiding the need to switch back and forth. Finally, *Transitions* lenses block 100% of UVA and UVB rays, and help protect against harmful blue light both indoors and out. The combination of value, ease and protection is an affordable advantage that is difficult to challenge.
- 4. Professional recommendations also make first-time buyers more comfortable with their decision to try something new and different.** Millennial, Gen X, and Boomer wearers all heed the recommendations of professionals.

ABOUT THE AUTHORS

TRANSITIONS OPTICAL

Transitions Optical is the leading provider of plastic photochromic (adaptive) lenses to optical manufacturers worldwide. Having been the first to successfully manufacture and commercialize plastic adaptive lenses in 1990, and as a result of its relentless investment in research and development and technology, Transitions Optical offers a wide variety of products, setting new standards of advanced performance to provide ever increasing visual comfort and UV protection.

Product leadership, consumer focus, and operational excellence have made the *Transitions* brand one of the most recognized consumer brands in optics.

For more information about the company and *Transitions* lenses, visit [Transitions.com](https://www.transitions.com)  [TransitionsPRO.com](https://www.transitionspro.com).

THE CENTER FOR GENERATIONAL KINETICS

The **center** for Generational Kinetics is the leading research, speaking and solutions firm focused on Millennials, Generation Z, and solving cross-generation challenges. The Center's team of PhD researchers, strategists, and speakers help leaders around the world solve tough generational challenges in areas ranging from leading across multiple generations in a global company to selling and marketing to Millennials and **Gen Z**.

Each year, The Center works with over 180 clients around the world, from care manufacturers and global hoteliers to insurance companies, hospital groups, and international software firms. The Center's team is frequently quoted in the media about the effect of generational differences on everything from shopping and parenting to works style and social media.

METHODOLOGY

The Center for Generational Kinetics conducted this research for Transitions Optical. The study was administered to 1,271 Canadian respondents, ages 22-65, and weighted to current Canadian Census data for age, gender and region.

The sample was divided between eyeglass wearers and non-wearers. Eyeglass wearers included 661 heavy wearers (6-12+ hours a day and 5+ days a week) and 354 light wearers (<6 hours a day or <5 days a week). The sample included a 256-person oversample of non-wearers which has compromised of individuals who wear contacts but not prescription eyeglasses, or who do not wear either.

The survey was conducted online from January 12, 2018 to January 19, 2018. It has a margin of error of +/-3.1 percentage points.

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