Luxottica Group S.p.A, the world’s largest eyewear company which controls over 80% of the world’s major eyewear brands, has acquired glasses.com.

Luxottica has agreed to invest in innovations to create an enhanced online experience that will be accessible to the independent practitioners in North America.

To better understand the Consumer Decision Journey customers have as they move through the buying process for various types of eyewear (sunglasses, non-prescription or Rx glasses) given the convergence of purchasing channels now available in the marketplace, Luxottica has issued a Request For Proposal which Team SeeResults has composed. The following report will outline both quantitative and qualitative findings, informing and suggesting how Luxottica group can create an enhanced online experience through glasses.com.
Research Objectives

1. Determine the **key purchase/decision drivers** across channels for upscale sunglasses and Rx/prescription glasses.

2. Construct a **representative buying process** with various decision points for each type of eyewear purchase that is an **omnichannel representation** of the market.

3. Determine how a digital platform, glasses.com, can increase **overall market penetration** for all types of eyewear purchases while at the same time making glasses **more accessible** and **potentially affordable** for consumers.

4. Determine the role that **social media** can have in learning more about the omnichannel purchase-decision-making interactions between online and brick-and-mortar channels, or as a tool to create a buzz about a new way to purchase eyewear.
Methodology

- **Secondary Research**
- **6 Shop-Along/In-Store Observations**
  - Primarily at Sunglass Hut
- **7 One-on-One Interviews**
  - Discussed past eyeglass purchases.
  - Also asked participants to use and give us their opinions on several eyeglass websites: Glasses.com, Lookmatic.com, ZenniOptical.com, and CheapGlasses123.com.
- **Qualitative Survey distributed on Facebook**
  - 55 respondents.
  - Survey was tailored to whether respondents wore just sunglasses, just prescription glasses, or both.
Secondary Research

Prescription Glasses

Industry Overview

- Sales of eyewear have increased over the past few years, driven by an aging population and increased instances of poor vision.

Consumer Overview

- Top 5 influencers in purchasing new eyeglasses: Change in needs, Recommendation from doctor, Insurance coverage, Discounts: price promotions and coupons, specific brand name/designer.
- Thirty six percent of consumers are influenced by doctor recommendations.
- Endorsements of certain items by eye doctors often are trusted by consumers.
- Consumers still prefer to purchase eyewear from an optician, as they feel they are more knowledgeable in terms of eye care.
- On average, prescription glasses wearers replace glasses every two years or less frequently.
- High costs and lack of insurance cause consumers to seek affordable eye care options.
- About 60% of glasses wearers have vision insurance, and another 40% do not know if they have it, which may impact where they shop for glasses.
- Younger prescription glasses wearers ages 18-34 are most influenced by styles and trends, and often view glasses as trendy items and accessories.
- Female glasses wearers, especially younger ones, are more likely than men to be interested in the appearance of glasses, and they seek out brand names and designer frames.
Secondary Research

Sunglasses

Industry Overview

- **Department stores**, in particular, remain one of the **primary points of reference** for premium sunglass consumers and offer significant growth potential. Today, owing to the increasing awareness about the benefits and trendy appeal of these accessories, sunglasses have the highest growth rate of all accessories despite the limited space department stores allocate to the category.

Consumer Overview

- Nearly half of respondents said they don’t use sunglasses **because they forget**.
- Barely one in six respondents cited **health dangers** as a reason for wearing sunglasses.
- 20% reported that they believe they are not at risk from sun exposure.
- More than 10% said they **don’t use any protection** on eyes or skin from the sun.
- Although 73% of respondents use sunglasses, **only 58% have their children wear sunglasses**.
- For functionality, people buy sunglasses for **winter sports, driving, or for tropical vacations**.
- **More than 55% of adults** in the United States **lose or break sunglasses every year**. The car ranks as the top place where respondents lose their sunglasses.

Secondary Research

Eyewear Purchasing Behaviors

- The majority (72%) selected eyeglasses in less than one hour.
- About eight out of ten (83%) bought only one pair of eyeglasses the last time they made an eyeglass purchase; only 17% bought two or more pairs during their last purchase.
- Over one quarter (27%) said they took advantage of promotions in making their eyeglass purchase.
- Just over half (52%) selected eyeglass frames before choosing lenses.

“Which (if any) of the following statements about eyeglasses do you agree with?”

Eyeglasses and Contact Lenses, September 2013, Mintel Oxygen; Jobson Optical Research 2010 Consumer Patterns Insight Survey.
In-Store Observations

Sunglass Hut: Prudential Center & Newbury Street locations

• Some consumers came to the store with the intention to purchase, while others stopped by just to browse.

• The first thing they did was pick up and try on sunglasses.

• After trying them on, some sought help from the salesperson. (They might like a pair of sunglasses but were dissatisfied with the detail. Then they asked for a recommendation from the salesperson.)

• Most people came with friends or family, and their companions’ suggestions were extremely important.

• People continued to try on sunglasses, even after making their decision and waiting to pay.

• Of the customers we spoke with, many preferred not to purchase glasses online because they needed to try them on.
Interviews Summary

Prescription Glasses

How often do you buy a new pair of prescription glasses?
- Not that frequently, it ranges from 1 to 3 years.
- I never throw away the old one after buying a new one, because I can wear it at home.

Where do you buy prescription glasses?
- In glasses outlets because the glasses are inexpensive.
- In specialty stores because I can have eye examinations on-site, and recommendations from the optician are important.

Do you purchase prescription glasses online?
- Most of the subjects never considered that, with the exception of buying contact lenses.
- Want to try them on in a brick-and-mortar store.
- I don’t trust the retailer online, and don’t trust the skill/work/carefulness of those who make the lenses.
- It’s inconvenient and troublesome to return the glasses if I am dissatisfied with the product.
- I don’t want to wait after ordering it.
- The quality is not guaranteed.
- The low price or discount might drive me to buy online.


Interviews Summary

Prescription Glasses

Which factor is the most important one when buying prescription glasses?

- **Fit** ranks number one.
- **Price** ranks number two, because sometimes they can feel the difference between wearing expensive eyeglasses and comparatively inexpensive ones.
- A variety of selections, styles, and customer service are also important.
- It would be better if the store is spacious enough.

Are you loyal to any retailer or glasses brand?

- Might be **loyal to a retailer** (store) because they have a professional optician that they are familiar with.
- Never be loyal to a particular brand, because fit is the most crucial factor.
Interviews Summary

Sunglasses

What drove you to buy a new pair of sunglasses?

- When I need a pair to protect my eyes, such as during skiing.
- When I saw other people online (especially celebrities/friends) wearing a good-looking and trendy sunglasses, I will search for a similar one.
- I wear sunglasses to look good, because it can make my face look smaller.
- When I feel bored or tired with my old pair.

Where do you buy sunglasses?

- In glasses specialty store.
- Online.

Do you purchase sunglasses online?

- Most said they never buy sunglasses online.
- One respondent: I bought a Ray-Ban sunglasses on Amazon.com, and I am planning to buy one on coachfactory.com.
Interviews Summary

Sunglasses

Which factor is the most important one when buying sunglasses?

- **Fit and a good-looking style** rank number one.
- **Low price or discount**, because I know the cost of producing sunglasses is very low, and it is expensive just because of the brand. I don’t want to spend much money only on the brand. (“I only buy sunglasses on sale when shopping online.”)

Are you loyal to any retailer or sunglasses brand?

- Seldom loyal to retailers, because I usually happen to go into or pass by a store and buy sunglasses.
- I am not loyal to any sunglass brand because **it’s not important**.
Interviews Summary

About Social Media & Websites

Do you follow any brands on social media?

- No, because it makes me feel I am passively receiving information, and the information sent from the brand are just ads, which I hate the most.
- I only search for a brand on social media when the brand sends me discounts/promotions.

Among glasses.com, zennioptical.com, lookmatic.com, and cheapglasses123, which site is your favorite or least favorite?

- Lookmatic.com is the favorite one because it looks fancy, cool, and fashionable.
- Cheapglasses123.com is the least favorite one because it looks like a website selling fake goods or a website of a medical institution.

Any advice for glasses.com?

- Too many words on the homepage, and it would be better if the homepage provide some information about the new arrivals and best products.
- It could provide the range of price and the discount rank when featuring by price.
- Add specific sizes. (i.e. width: 60 mm)
- When clicking a specific pair of glasses, the website can automatically pop out a model wearing the glasses.
One-on-One Interview

Kathleen, 24

**Prescription Glasses**
- Has worn prescription glasses for 10+ years
- Fit is extremely important
- “I literally tried on the entire store”
- Prefers not to buy online unless she knows exactly how they will fit

**Sunglasses**
- Primarily wears Oakley sunglasses
- Bought them at first for the fit and for eye protection during sailing
- Over the course of several years, has purchased four of the exact same style
- “Why try to change something that’s already pretty awesome?”
Survey Findings: Sunglasses

- 34 respondents
- Purchased sunglasses for style, eye protection
- Brands: Ray-ban, Oakley, Knock Around, Maui Jim
  - 5 had no brand preference
  - Brands selected for style, brand reputation, polarization, fit

Would you ever consider switching to a different brand of sunglasses?

If yes, why?

Based on style, price, and feel
Survey Findings: Sunglasses

Did you shop around to different retailers before making the above mentioned purchase?

- Yes (21.43%)
- No (78.57%)

Have you taken advantage of a promotion, a coupon, a discount, or a special sale when making your sunglasses purchase?

- Yes (39.29%)
- No (60.71%)

50% of purchases were an impulse buy, while 42% of purchases involved research beforehand.
Sunglasses Purchasing Process

1. Want/Need
2. Research
3. Look Online
4. View Selections In-Store
5. Ask Advice/Recommendations
6. Try On Glasses
7. Compare Prices
8. Purchase
Sunglasses Purchasing Process

“I realize I need new sunglasses. I ask my friends if they know any good brands for good quality sunglasses. I go online and research what some good quality brands are for sunglasses (Google). I choose a pair or brand that I like. I go online and look up where their nearest store location is in the area. I drive to the store so I can look around and try on sunglasses. I buy the one that I want. I'm happy.”

“They both depend on style and price, I'll try different ones on to narrow down a selection of the ones I think look the best, then I choose the cheapest ones.”

“Research and try on and [then] buy.”

“Research different styles and colors then purchase online.”
Survey Findings: Eyeglasses

• 30 respondents
• People purchase new frames every 2-3 years
  • 12 respondents said 4+ years or “not often”
• Why do they purchase new frames?
  • 51% said for a “new prescription”
  • 28% said for a “new style”

Do you own more than one pair of prescription glasses?
Survey Findings: Eyeglasses

What our respondents have purchased:

- Brand name (Ray-Ban, Calvin Klein, Armani, Michael Kors, Guess)
- Generic (WalMart)
- Don’t Know/Can’t Remember (25%)
Eyeglasses Purchasing Process

1. **Worsening Vision**
2. **Routine Eye Exam**
3. **Get New Prescription**
4. **Browse Doctor’s Office**
5. **Research**
6. **Browse Retailers**
7. **Browse Online**
8. **Try On Glasses**
9. **Compare Prices**
10. **Purchase**
11. **Doctor’s Recommendation**
Eyeglasses Purchasing Process

“Go to my eye doctor for a new prescription, find out where I can get a good deal on new prescription and frames, pick out frames that I like from the place that I can get a good deal from.”

“1. Eye doctor appointment 2. Look in the store at the doctors 3. Look at all stores I regularly shop at for glasses 4. Specifically go to glasses stores 5. Find [...] best price.”

“Vision gets fuzzy, go to eye doc to get a prescription, look around at various retailers, look to see what styles they have and compare prices.”
Eyeglasses Purchasing Process

“I decide I want/need new glasses. First, I would speak to my optometrist and get my exact glasses prescription then I might check the optometrists shop to see if any glasses are priced correctly. Next, go online and browse the options. Finally, after selecting an option, enter my information and make the purchase.”

“Glasses break or prescription is outdated, I visit the doctor. Do test, get A+ and win brand new glasses. Doctor tells me I failed my exam and that I need new glasses to win the game. I purchase new Glasses and feel complete.”
Purchase Journey

- Price is by far biggest influence, followed by styles
- Most recent purchase:
  - Mall, Eye Doctor’s Office, Costco, WalMart, Retailers (Sunglass Hut, Lenscrafters, Pearle Vision, For Eyes), Misc. (drugstore, Forever 21, Urban Outfitters)
    - 7% said online (Oakley.com, Coastal.com)
- 78% visited a single retailer
  - No more than 3
- 38% impulse buy
- 40% did research
  - Others recommended/chosen by doctor
- For suggestions…
  - 81% browse in stores
  - 30% ask friends
Online Purchases?

Have you ever shopped for prescription glasses or sunglasses online?

• 65% would not purchase online
  • 100% who do not shop online (n = 35) said they want to see how they look and feel
• 39% browse online before purchasing

Those who do shop online…

• What they do like: convenience, price, and selection
• Where they go: Knockaround.com, Sunglasshut.com, WarbyParker.com, Oakley.com, cheapglasses123.com
Deals & Discounts

• 60% have never taken advantage of deals when purchasing eyeglasses/sunglasses
• 40% that did…
  • BOGO, % off/store sale, AAA/insurance discount
  • 1 said eye doctor deal
Social Media

Do you use social media to get a feel for a brand of prescription glasses or sunglasses before purchase?

Those who said “yes” use Facebook, Twitter, and Instagram to do so.
Implications

People who purchase sunglasses...
- Consider style, fit, and eye protection before brand name.
- Our sample was split making an impulse purchase and a rational purchase.

People who purchase prescription glasses...
- The majority purchase prescription glasses on a “need” basis (not on impulse).
- Brand name was not important, but style/fit and price was.

Overall...
- They enjoy having the opportunity to physically try on a variety of fits and styles to find the perfect pair before making a final purchase.
- Most consumers that shop for glasses online only do so to find styles to try on in-store and not to purchase.
- Consumers who do purchase online value convenience and price as well as a large selection.
- Although some consumers research online before purchasing, Social Media is not a top source for specific brands or style suggestions.
Implications

Website Opinions

• The layout of the website is very important to users.
  • A messy layout suggests a cheap product; Users found those websites “untrustworthy.”
  • They prefer a simple layout with highlighted features (i.e. “New Arrivals,” “Best Sellers”).
• Users want to see models wearing the styles so they can imagine themselves wearing the style.
• Users want highly detailed features of different styles (i.e. bridge sizes) so they know the exact fit.
• Price was very important in convincing users to shop online.
  • Users want to be able to organize styles by price or by amount of discount.
Recommendations

**Directly associate Glasses.com to brick-and-mortar**

- Feature Glasses.com “best-sellers” display and with an in-store kiosk with a version of the Glasses.com app
  - Users can e-mail themselves recommendations and compile a wish list
- Train sales associates to discuss the benefits of Glasses.com with in-store consumers
- This will not only be convenient for consumers who prefer to try on styles in person, but it will also in-store drive shoppers to the website

**Glasses.com kiosks at Dr.’s offices**

**Create highly customizable options**

- Allow users to search by specific frame or lens features

**For returning users, site makes suggestions based on searches or past purchases.**
Recommendations

Allow search for specific price/size range

- Name classifications for different fits/sizes
- Lense height & width, bridge width, temple length, frame tilt

Leverage younger eyeglass/sunglasses wearers who focus on glasses as trendy accessories. Reach out to these influencers and make agreements with them to become Luxottica/Glasses.com ‘brand representatives’ to promote the brand through influencer existing social channels (Facebook, Instagram, Twitter, YouTube).
References


