

IS POLARIZED POISED TO TAKE OFF?

BY MARGE AXELRAD AND ANDREW KARP

Polarized lenses have had an image problem. Although prized by athletes, outdoor enthusiasts and others with active lifestyles for their glare-blocking properties, polarized lenses are not regarded as essential by many sunglass wearers, particularly those who favor fashion over performance.

Yet polarized sunwear—both prescription and plano—is increasingly being viewed as an avenue for “upside” growth in the optical industry as a variety of forces converge to push polarized products to the forefront. Major retailers are gearing up to promote polarized. Lens suppliers have introduced new technologies that are expanding the capabilities and range of polarized products. New equipment and processing techniques are enabling prescription laboratories to manufacture prescription lenses for wrapped sunglasses and other fashionable styles.

Despite the uncertain economic outlook, a changing health care reimbursement environment and a competitive landscape changed by digital trends, one thing is sure, to quote one famously optimistic view: the sun will come out tomorrow.

The increasing opportunities for polarized sunwear, and sunwear in general, are riding two major

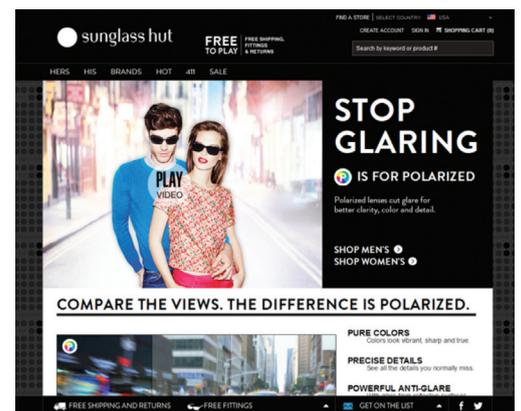
demographic waves. The first, Baby Boomers, the group which has long been a major force for the ophthalmic/optical channel among independent ECPs and optical retailers, is aging and searching for comfortable, technical sun protection options. There is still much work to be done in raising consumer awareness of the dangers of UV, but this huge customer group is poised and ready to embrace Rx sun protection ideas and products.

The second group, Millennials, who are plano customers, but also, importantly, still a healthy proportion of single-vision Rx patients, are bringing their own ideas and receptivity to lifestyle, sport and fashion sunwear concepts to the market.

These bigger trends, and a crescendo of recent developments in the arena of polarized, glare-reduction sunwear lenses, both plano and Rx-friendly (see timeline, Page 46), have got several influential market observers and participants planning around the promise of polarized, particularly in 2014.

Jobson Research, which annually surveys eye-care professionals about various aspects of their business, reported in its 2013 Premium Lenses MarketPulse Survey for *20/20 Magazine* that 66 percent of ECPs surveyed said that they had experienced an increase in polarized lens sales. The MarketPulse 2012 and 2011 surveys on the same topic

reflected more than half of the ECP respondents saying the same thing—that their polarized sun lens sales were on the rise.



Luxottica Retail, through all of its brands, intends to promote new technologies in Rx sun in 2014. Sunglass Hut in particular has been emphasizing the features and benefits of polarized lenses and will continue to do so next year, executives said.

Representing the larger retail platforms of Lens-Crafters and Sunglass Hut, Luxottica Retail executives at the group’s most recent investor day presentation earlier this month pointed to polarized specifically as a category that will be a focused initiative for the next several years. Sun, in general, said

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COVER TOPIC

Polarized Lenses Gather Momentum

A timeline of recent product launches and developments

The polarized lens market, both prescription and plano, has taken on new dimensions in the past few years. This timeline shows some of the most important recent developments in the polarized lens category, including notable acquisitions, key product launches and new technology introductions.

August, 2013

Revo Gets New Owner and Renewed Development



Sequential Brands Group Inc. acquired the Revo brand, including all of the related intellectual property and certain other assets, from Oakley. In connection with the acquisition, Sequential signed a long-term license agreement with eyewear company B. Robinson to manufacture and distribute Revo sunglasses and related products. The company signed a long-term partnership agreement with Sunglass Hut to continue distribution of Revo at Sunglass Hut stores globally and enable Revo-branded eyewear to be sold at other retailers as well.

July, 2013

Essilor Acquires Intercast



Essilor acquired 100 percent of the capital of Intercast, a Parma, Italy-based maker of high-performance sunlenses, including the NXT line. Essilor said the move, which was announced simultaneously with Essilor's acquisition of Transitions Optical, is part of the company's strategy of helping eyeglass wearers with "brightness management."

July, 2013

Transitions Optical Celebrates Production of One Million Transitions Vantage Lenses



The one millionth Transitions Vantage lens came rolling off a production line in Transitions Optical's Pinellas Park, Fla.

plant this summer. Transitions Optical's second shift trans-polarizing production team celebrated the event. Pictured (l to r) are Leslie Wall, Shaun Severin, Amanda Finan, Renee Gouaux, Bill Putnam and Kelly Wilson.

March, 2013

Transitions Optical and Younger Optics Host Educational Tour



Transitions Optical and Younger Optics hosted the Bright Solutions city tour, which stopped in 15 cities throughout the U.S. The ABO-approved educational events offered insights into the changing expectations of consumers and how eyecare professionals can meet these expectations by personalizing lens recommendations based on each patient's individual lifestyle needs. The seminar also provided sample patient profiles and research based guidelines on the most impactful ways to recommend everyday and sunwear lenses. Shane Scott, Younger Optics (l) and Brian Atkinson, Transitions Optical, are seen presenting at the Bright Solutions City Tour in Fort Worth, Texas.

February, 2013

Costa's New Rx PAL Widens Field of View



Costa Del Mar's Rx division launched C-Scape, an exclusive progressive sun lens design engineered to accommodate the

distance vision needs of water sports and outdoors enthusiasts. The new C-Scape technology widens the field of view from left to right and enhances peripheral vision to create what Costa referred to as, "the clearest Rx sun lens available."

To produce the lens, Costa utilizes its proprietary Waypoint digital processing technology which eliminates the blurry edges that can bother active wearers of wrap sunglasses. The process is computer guided for accuracy, and also incorporates the behavior patterns of the active wearer, the high base curve effect of the wrap lenses and specific frame data. This leads to a wider field of vision and improved clarity and comfort, allowing the lenses to be worn all day without eyestrain and headaches, Costa said.

Costa fills all Rx sunglass orders at its state-of-the-art prescription lab in Daytona Beach, Fla.

January, 2013

Essilor Launches Xperio UV Lenses



Essilor of America launched Xperio UV lenses, the first and only outdoor lens solution to offer all of the benefits of a polarized lens, plus complete protection against damaging UV light for long-term visual health. Xperio UV is the first, complete outdoor sunlens solution that eliminates blinding

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A Timeline of the Polarized Lens Market

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reflective glare while providing the maximum UV protection on both the front and backside of the lens. During the consumer advertising campaign, which ran this year from February to July 2013, there were approximately 1,500 daily unique visits to the ECP locator on XperioUV.com to find an ECP near them, the company reports. Additionally, the lenses are the only option on the market to offer an Eye-Sun Protection Factor (E-SPF) of 50+, which provides at least 50 times more protection from dangerous UV radiation compared to wearing no lenses at all.

November, 2012

Maui Jim Celebrates Creation of One Millionth Pair of Rx Sunglasses



Maui Jim made its one-millionth pair of polarized prescription sunglasses at its 25,000 square foot digital lens lab in Illinois, a major milestone in the company's 16-year history. The Hawaii-based company claims to be the fastest growing manufacturer of premium polarized sunglasses in the world. Most of the company's sunglasses are available with prescription lenses. Maui Jim is the world's only company that is able to produce polarized prescription single gradient lenses.

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October 2012

Younger Optics Releases First Polarized Lens iPad App in Optical Industry



Younger Optics released NuPolar, an educational iPad app that eyecare professionals can use to demonstrate polarized lenses to their patients. The free, high-tech tool engages patients in a discussion about the unique benefits of polarized Rx sunwear. The app includes images, computer graphics and narrated video to help the patient understand both polarized sunlight and polarized lenses.

The NuPolar iPad app is distributed exclusively through Apple's online iTunes Store.

May, 2012

Transitions Optical Launches Vantage, the First Variable Polarized Lens



Transitions Optical launched Vantage, featuring the latest breakthrough in adaptive lens technology—variable polarization. Transitions Vantage lenses are the first lenses designed to both darken and polarize upon UV exposure.

Until now, polarization existed primarily as a

fixed film in sun lenses. Transitions Vantage lenses employ a new technology different than current photochromics and polarization. While current photochromic molecules darken in random patterns creating an even tint, the photochromic dyes in Transitions Vantage lenses not only darken, but also align to create polarization. This means that Transitions Vantage lenses will have a variable level of polarization efficiency depending on the amount of UV exposure—the darker the lens, the more polarization efficiency there is. The lighter the lens, the less polarization there will be.

April, 2012

Safilo Completes Acquisition of the Polaroid Eyewear Business



PERFECT VISION. Polaroid Polaroid Sunglasses

Safilo Group S.p.A. announced they completed the acquisition of the Polaroid Eyewear business, a move originally announced in November 2011. 2012 was Polaroid's 75th Anniversary, a pioneer in polarized lens technology and iconic sunglass brand. Safilo Group said Polaroid would occupy an important place alongside the company's other owned brands, including Carrera, Safilo and Smith, the company said. Safilo then develops a new, contemporary marketing campaign for Polaroid.

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March, 2012

KBco and Transitions Release Xperio Transitions in Polycarbonate



KBco and Transitions Optical released Xperio Transitions performance sunlenses in polycarbonate. The polarized sunlenses adapt to changing light conditions, improve contrast and reduce blinding glare from sunlight reflected off the surface of objects, water or snow.

May, 2011

Safilo Launches Carrera X-Cede



Safilo USA launched Carrera X-cede, powered by NXT lens technology, a technologically advanced, color-enhancing, polarized lens offering, in a prescription-ready Carrera sunglass collection. The patented, proprietary technology uses a breakthrough non-film polarization system that provides a molecular bond to the lens, fusing polarization and color-enhancement. It provides edge-to-edge polarization and optical clarity, which will not delaminate, peel or fade. The lenses are only available through the Carrera X-cede authorized laboratory network and Carrera X-cede authorized optical retailers.

April, 2011

Vision-Ease Kicks Off Coppertone 'Endless Summer' Promotion



Vision-Ease Lens launched its "Endless Summer" sales promotion in support of its Coppertone brand polarized prescription lenses. The company also raised the brand's profile with a new Coppertone website and brochure that emphasized that the lenses also block harmful HEV and blue light. Coppertone lenses also received a nod from the The Skin Cancer Foundation, which recommended them as an effective UV filter for the eyes and surrounding skin. ■

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COVER TOPIC

Opportunity Knocks for Polarized Sunwear

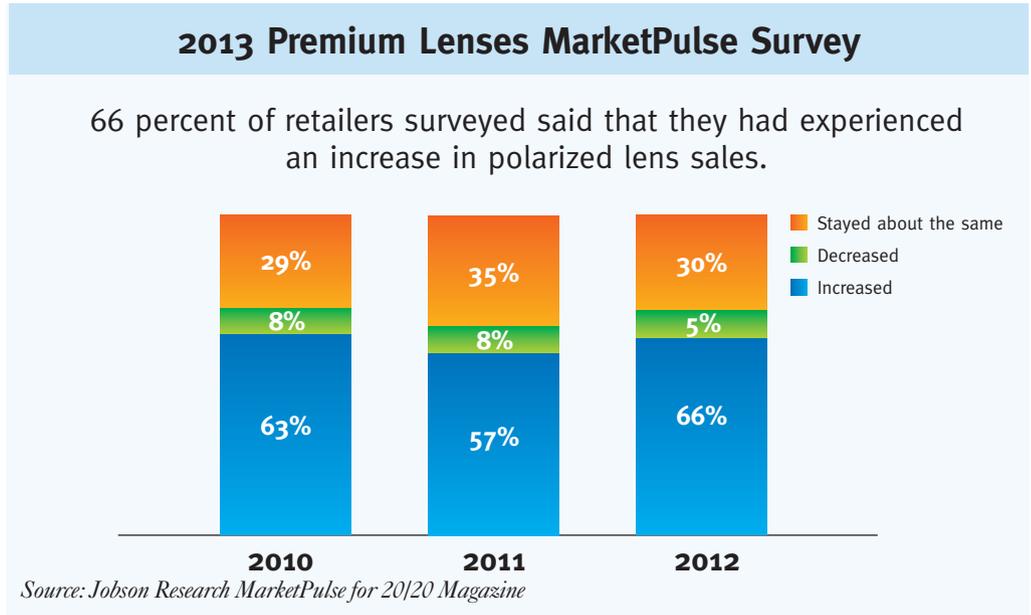
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Andrea Guerra, Luxottica Group's CEO, will be supported by "the further premiumization of the sunwear category and [reflects] an increase in the number of frames purchased per customer, as North American consumers continue to focus on brands, style and design, and opt for polarized lenses as part of their eyewear selection."

In the presentation to analysts about the potential of reaching what he describes as the "untouched" market, Guerra pointed out, "Think about how digital surfacing allowed a completely different way and perception of sun Rx. Ten years ago, if someone was wearing prescription sunwear, you could spot them right away, very rectangular, flat lenses. Today, 80 percent to 85 percent of what you see in Sunglass Hut is Rx-able. This is what's completely new, and we have a new generation coming into this prescription world," he said.

Eric Anderson, president of LensCrafters, added further comments as part of his discussion of the retailer's move to position itself as a global premium vision care leader. He said, "The sun category in North America is truly an emerging market. Too many eyeglass wearers are walking around without proper sun protection or squinting without proper visual acuity in many situations, including driving the kids to soccer practice. We have plans to grow this business dramatically."

And the company reflected that part of its past and future investments in the North American mar-



More than two-thirds of ECPs surveyed by Jobson research say they have seen their polarized lens business increasing.

ket are resulting in digital lens surfacing capabilities for its retail group support and its own brands that will bring sun Rx technology even further to the forefront next year.

Essilor has also been more active in its efforts to promote sunwear, which the company is approaching from a health and wellness perspective. This summer, the company acquired full ownership of Transitions Optical, which has been experiencing success with its new Vantage indoor-outdoor polarized photochromic lenses and Intercast, a sunlens company

whose NXT polarized lenses are used in many premium sunglass brands.

Speaking to financial analysts following Essilor's announcement in July that it is acquiring Transitions Optical and Intercast, company chairman Hubert Sagnieres discussed the importance of "brightness management," which he referred to as "an essential vision need."

These developments bode well for the growth of polarized lenses and sunwear overall. ■



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