



Sunglasses and Fashion Spectacles

Consumer Purchasing Decisions

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Sweeney Research is accredited under the International Standard, ISO 20252.
All aspects of this study have been completed in accordance with the requirements of that scheme.



Introduction

Introduction

- The Australian Competition and Consumer Commission (ACCC) administer national product safety regulations and monitors the safety of general consumer products.
- Fashion spectacles are glasses worn primarily for fashion and feature untinted or lightly tinted lenses which do not substantially reduce sun glare or UV radiation. They offer little or no protection to the eyes.
- Short-term exposure of the eyes to solar UV radiation can cause temporary eye complaints, ranging from mild irritations such as discomfort, excessive blinking and swelling, to the painful but reversible condition known as 'snow blindness'
- Long-term exposure of the eyes to UV radiation may be a factor in causing serious permanent damage to the eyes, including cataracts, retina degeneration and cancer.
- Sunglasses and fashion spectacles are regulated in Australia by a mandatory safety standard
- A key requirement of the safety standard is that products are clearly labelled with a lens category (0-4) and correct description of the level of UV and sun glare protection they provide.
- Prior to commencing a consumer education and information campaign, the ACCC has identified the need to conduct a benchmark research study to investigate current awareness of safety considerations regarding eye protection from sun exposure and how this impacts purchase decision making for sunglasses and fashion spectacles.
- The following report contains the results of the quantitative online survey conducted in September 2013.

Lens Category Classification

Lens category 0 (Fashion spectacles)... Very low ability to reduce sun glare. Provide limited UV protection.

Lens category 1 (Fashion spectacles)... Provide limited sun glare reduction and UV protection. Not suitable for driving at night.

Lens category 2 (Sunglasses)... Provide a medium level of sun glare reduction and good UV protection.

Lens category 3 (Sunglasses)... Provide a good level of UV protection. High levels of sun glare reduction.

Lens category 4 (Sunglasses)... Special purpose sunglasses that provide a very high level of sun glare reduction and good UV protection. Lens category 4 sunglasses must not be used when driving at any time.



Research Objectives

- To provide a benchmark measure of consumer awareness of **safety considerations** regarding eye protection from sun exposure and how this impacts **purchase decision making** for **sunglasses** and **fashion spectacles**

Usage

- Frequency of wearing sunglasses
- Conditions and circumstances in which sunglasses are worn
- Number of sunglasses owned
- Factors which influence the choice of which pair to wear (i.e. fashion/appearance, level of eye protection, activity being undertaken etc.)
- Frequency of replacing/updating sunglasses
- Does eye protection from sun damage influence the decision to wear sunglasses?
- Do consumers check/consider category of protection before using sunglasses?

Purchase Decisions

- Factors that inform a decision to purchase sunglasses (i.e. fashion/appearance, eye protection – UV, glare, budget, brand, price etc.)
- Level of importance of such factors in purchase decision
- Number of sunglasses purchased in last 5 years
- Purchase history – up to the last 3 pairs (retailer, location – online or in-store)

Information Sources

- Do consumers seek safety advice on sunglasses? If so, from where?
- Social media channels used by consumers
- Online forums or websites of interest when searching for product or safety information

Awareness of Lens Categories

- Awareness of the existence of lens categories
- Understanding of lens categories (if aware)
- Do consumers review the lens categories before or after purchase?
- Perceived usefulness of lens category information
- Do consumers keep this information after purchase? Is it referred to after purchase?

Awareness of Eye Damage from Sun Exposure

- Level of awareness of the dangers of sun exposure to the eyes
- Experience of eye damage or eye problems from sun damage

Response to Campaign Taglines

- Interest in campaign about selecting appropriate sunglasses
- Preferred campaign tagline(s) from list of options



Research Methodology

Research Methodology

The study involved the conduct of **500 online surveys** with people aged 18+ years.

To qualify for the survey, participants had to meet the following criteria:

- Own at least one pair of sunglasses
- Have purchased at least one pair for personal use in the last two years

Surveys were conducted between 20th and 27th September 2013 and the average survey duration was 12 minutes.

Quotas were applied to the sample to ensure adequate coverage across age, gender and location. The final achieved sample structure is shown in the table on the right.

Sample for the survey was provided by an online panel provider – Lightspeed Research.

This report features several tables and charts which provide results by sub-group. A green arrow ▲ denotes a result which is significantly higher than other subgroups, while a red arrow ▼ denotes a result which is significantly lower than other sub-groups.

	#	%
GENDER		
Male	250	50%
Female	250	50%
AGE		
18-29 years	170	34%
30-44 years	165	33%
45+ years	165	33%
LOCATION		
VIC/TAS	145	29%
NSW/ACT	145	29%
QLD	80	16%
SA/NT	65	13%
WA	65	13%



Summary of Key Findings

Summary of Key Findings

Usage

- **Sunglasses are a common accessory...** with around seven in ten (71%) Australians owning at least one pair of non-prescription sunglasses. Of those who own sunglasses, the majority (79%) wear them all or most of the time when outside on a sunny day. The majority (76%) also wear sunglasses all or most of the time when driving or travelling in a vehicle.
- **Function is more important than fashion...** The most common reasons for wearing sunglasses are to prevent glare, protect eyes from UV/sunlight and to protect eyes from sun damage. Compared to other age groups, 18-29 year olds are significantly more likely to be wearing sunglasses to look good or to be fashionable, however glare and UV protection are still the main reasons for wearing sunglasses in this age group.
- **Updates or replacements are frequent...** More than three quarters (77%) of survey respondents replace or update their sunglasses at least once every two years.

Purchase Decision Making

- **Purchase location varies...** While specialist sunglass stores and fashion stores are the most common purchase locations, department stores, optometrists, chemists and discount stores are also widely used. Retail store purchases are more common than online purchases (89% purchase last pair of sunglasses from a retail store compared to 11% online).
- **Protection is highly important when choosing sunglasses...** The level of UV protection is amongst the most important purchase decision factors – 82% consider this to be extremely or very important when deciding which sunglasses to purchase. Glare reduction is also a critical factor for most.

Awareness of Lens Classification

- **Opportunity to raise awareness of lens classification...** Around four in ten respondents are unsure how to evaluate the level of protection from UV and glare provided by sunglasses. When prompted with information about the lens classification, 41% were unaware of the system – only 24% had definitely heard about the classification.
- **Lens classification considered useful and important...** Of those aware of the classification, the majority (79%) consider it to be extremely or very useful in helping to decide which sunglasses to purchase. Close to one third (30%) believe it is the most important factor when deciding which sunglasses to purchase – a further 63% believe it is equally as important as other factors.

ACCC Product Safety Information Campaign

- **Information seeking is currently limited...** Only one in four have sought information on product safety and sunglasses, with store sales people the most common sources of information. There is also low awareness of where to go for product safety information about sunglasses.
- **High interest in ACCC campaign...** More than three in four at least moderately interested in receiving information from the ACCC. Of the taglines evaluated for the campaign, the following was the most preferred...

'Give your eyes a bright future – keep them protected'

More than four in ten rated this tagline as either their first, second or third preference.

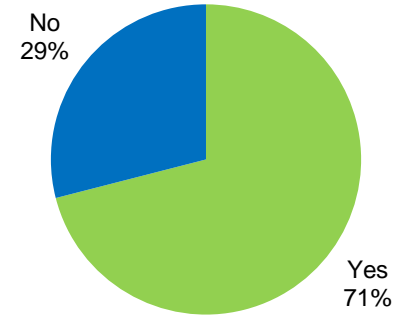


Usage

Sunglasses Ownership

- The majority of Australians (71%) own a pair of non-prescription sunglasses for personal use.
- Of those who currently own non-prescription sunglasses, 38% own just one pair of sunglasses and 38% own two pairs. The remaining 24% own three or more pairs.

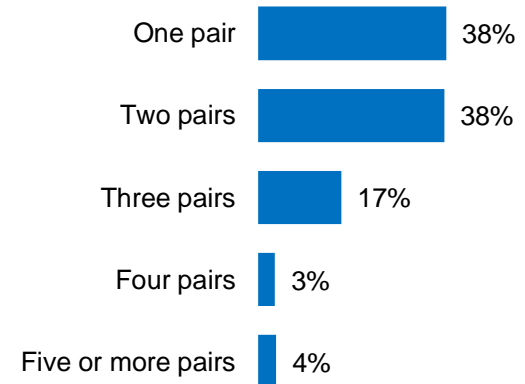
OWNERSHIP OF NON-PRESCRIPTION SUNGLASSES



Base: All contacts (1,058)

S4. Do you own a pair of non-prescription sunglasses for your own personal use?

NUMBER OF SUNGLASSES CURRENTLY OWNED



Base: All Respondents (500)

Q1.1 How many pairs of sunglasses do you currently own?

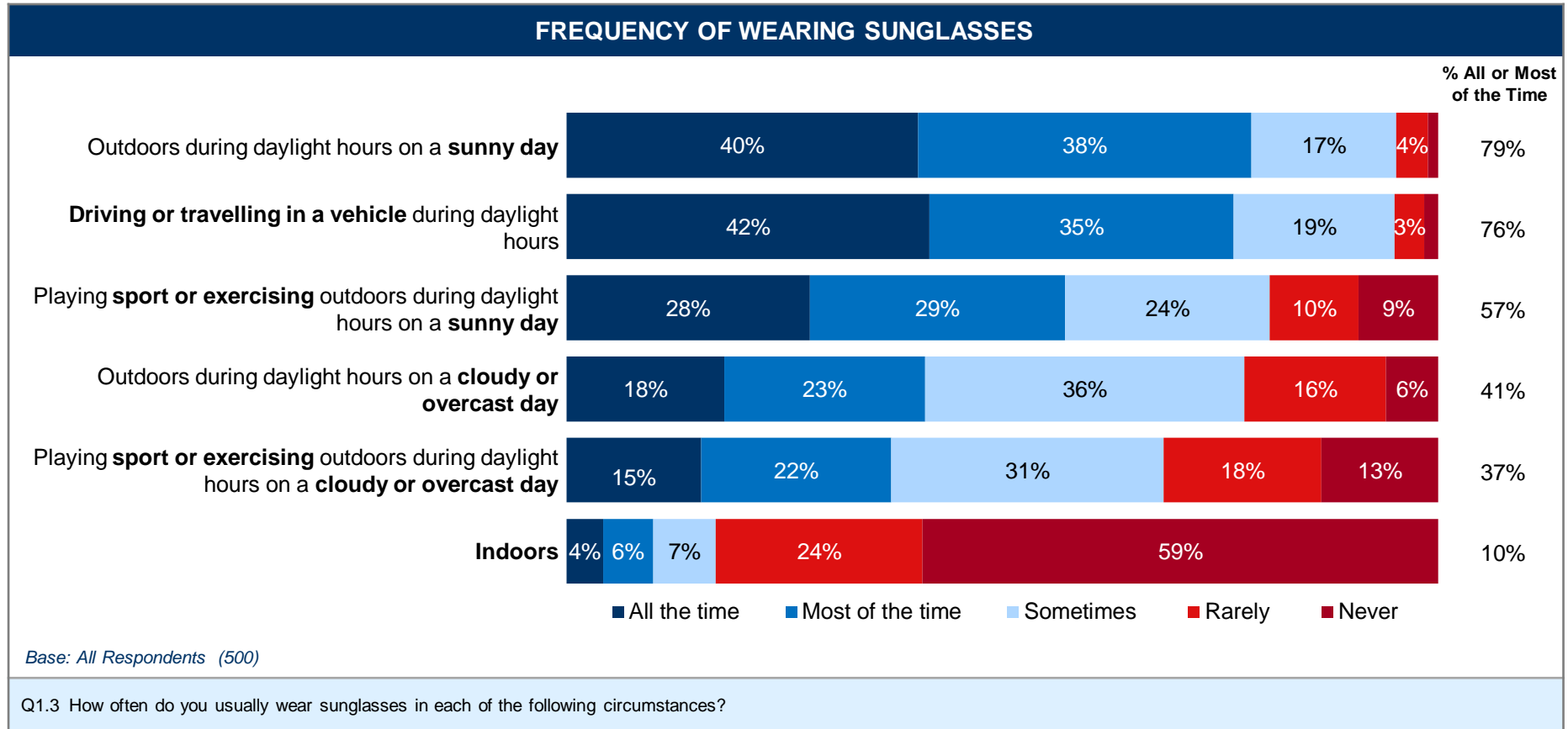
Sunglasses Ownership

- Ownership of non-prescription sunglasses is largely consistent across all segments.
- Those aged 45+ years and residents in SA/NT show a marginally lower incidence of owning non-prescription sunglasses.

SUNGLASS OWNERSHIP – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	1,058	546	512	343	336	379	312	303	169	128	146
Own non-prescription sunglasses	71	72	71	72	74	69	70	70	76	77	65
Sample Size	500	250	250	170	165	165	145	145	80	65	65
One pair	38	39	38	37	41	38	41	39	38	35	34
Two pairs	38	40	35	36	41	36	40	37	34	37	42
Three pairs	17	14	19	19	15	17	12	14	23	23	18
Four pairs	3	2	5	3	2	5	4	3	1	3	5
Five or more pairs	4	4	3	5	1	5	2	6	5	2	2
S4. Do you own a pair of non-prescription sunglasses for your own personal use? Q1.1 How many pairs of sunglasses do you currently own?											

Frequency of Wearing Sunglasses

- Wearing of sunglasses is most common when outdoors on a sunny day and when driving or travelling in a vehicle.
- One in five are unlikely to wear sunglasses when outdoors on a cloudy or overcast day.



Frequency of Wearing Sunglasses

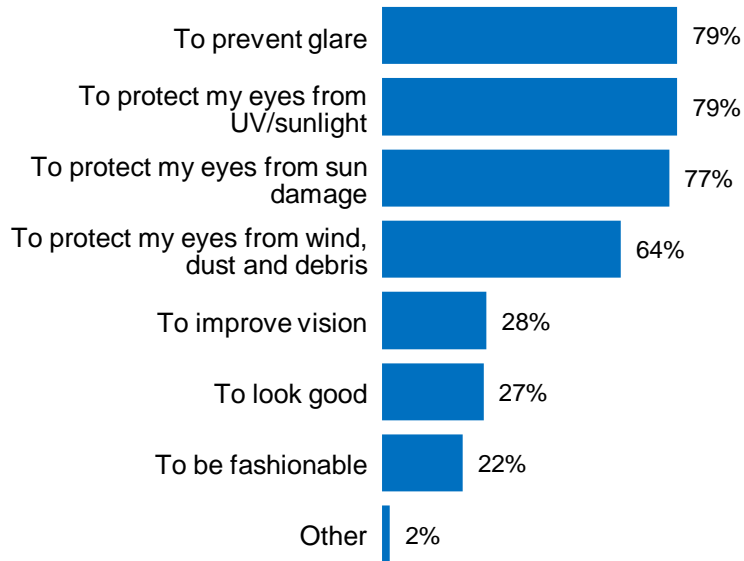
- Females are significantly more likely than males to wear sunglasses when driving or travelling in a vehicle.
- The younger age segment (18-29 years) show lower frequency of wearing sunglasses when playing sport or exercising. They are also less likely to wear sunglasses when driving or travelling in a vehicle.

FREQUENCY OF WEARING SUNGLASSES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
<i>Sample Size</i>	500	250	250	170	165	165	145	145	80	65	65
Outdoors during daylight hours on a sunny day	79	74	83	75	80	81	77	77	80	82	83
Driving or travelling in a vehicle during daylight hours	76	71 ▼	82 ▲	68 ▼	83	78	74	69	86	86	77
Playing sport or exercising outdoors during daylight hours on a sunny day	57	56	58	46 ▼	66 ▲	60	56	56	64	55	57
Outdoors during daylight hours on a cloudy or overcast day	41	36	47	39	47	39	37	39	48	45	46
Playing sport or exercising outdoors during daylight hours on a cloudy or overcast day	37	36	39	27 ▼	47 ▲	38	34	36	45	37	38
Indoors	10	10	9	14	13	2 ▼	9	10	10	8	14
Q1.3 How often do you usually wear sunglasses in each of the following circumstances?											

Reasons for Wearing Sunglasses

- The most common reasons for wearing sunglasses are to prevent glare, protect eyes from UV/sunlight and to protect eyes from sun damage.
- Protection from wind, dust or debris is also a common reason for wearing sunglasses.

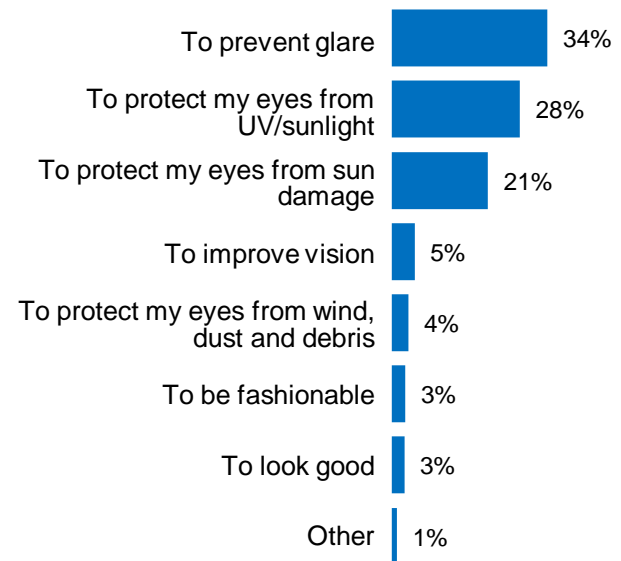
REASONS FOR WEARING SUNGLASSES



Base: All respondents (500)

Q1.4. For which of the following reasons do you choose to wear sunglasses?

MAIN REASON FOR WEARING SUNGLASSES



Base: All respondents (500)

Q1.5. And which of the following would you say is the **main reason** why you choose to wear sunglasses ?

Reasons for Wearing Sunglasses

- The younger age group (18-29 years) is significantly more likely to be wearing sunglasses to look good or to be fashionable. Residents in SA/NT are also significantly more likely to wear sunglasses for these reasons.
- Compared to other age groups, preventing glare is a greater motivator for wearing sunglasses in the 45+ year age segment.

REASONS FOR WEARING SUNGLASSES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
To prevent glare	79	77	82	75	75	87▲	79	76	81	82	82
To protect my eyes from UV/sunlight	79	76	83	74	85	78	80	74	78	83	86
To protect my eyes from sun damage	77	76	78	74	80	77	72	79	76	77	83
To protect my eyes from wind, dust and debris	64	61	67	65	63	64	61	62	66	71	66
To improve vision	28	31	25	34	27	23	30	31	24	23	26
To look good	27	29	26	44▲	28	9▼	24	31	14▼	29	40
To be fashionable	22	24	19	38▲	22	5▼	21	21	11	20	38▲
Other	2	2	2	2	1	3	3	2	0	3	2
Q1.4. For which of the following reasons do you choose to wear sunglasses?											

Main Reason for Wearing Sunglasses

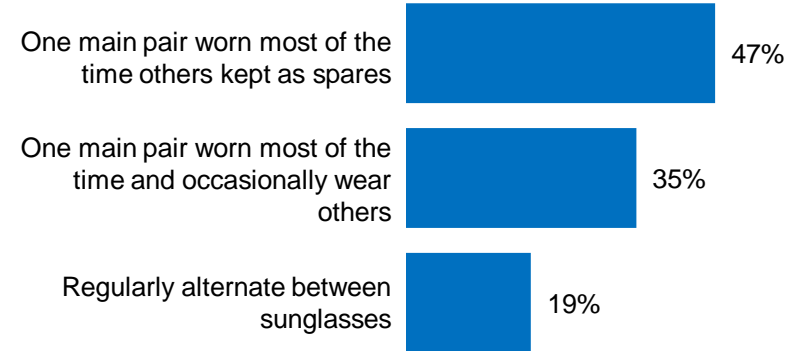
- The main reason for wearing sunglasses is largely consistent across all segments with no significant differences noted.

MAIN REASON FOR WEARING SUNGLASSES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
To prevent glare	34	30	38	28	33	42	32	37	35	37	29
To protect my eyes from UV/sunlight	28	28	28	30	32	22	31	26	29	23	29
To protect my eyes from sun damage	21	22	21	18	19	28	21	19	24	25	22
To improve vision	5	6	4	5	5	5	6	6	5	3	5
To protect my eyes from wind, dust and debris	4	6	3	8	4	1	4	5	3	5	5
To be fashionable	3	4	2	5	4	0	3	2	1	3	6
To look good	3	4	2	6	2	0	1	4	4	3	3
Other	1	2	1	1	1	2	2	1	0	2	2
Q1.5. And which of the following would you say is the main reason why you choose to wear sunglasses ?											

Usage of Multiple Pairs of Sunglasses

- Of those who own multiple pairs of sunglasses, the majority have one main pair and keep the others as spares or for occasional use.
- A notable proportion (19%) regularly alternate between multiple pairs of sunglasses.
- When selecting which pair of sunglasses to wear on any particular occasion, a number of factors will influence the decision.
- The most common influences are the activity being undertaken, outfit or clothing and location.

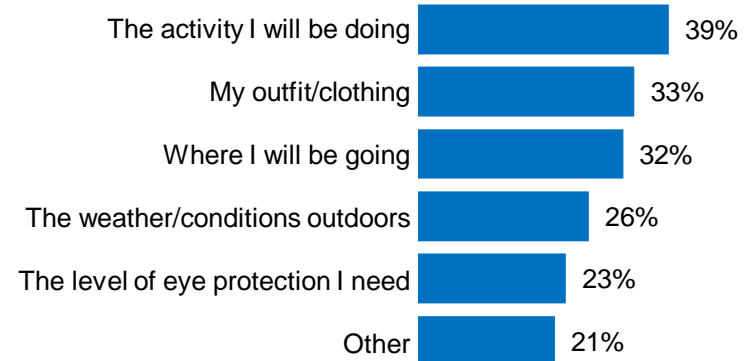
USAGE OF MULTIPLE PAIRS OF SUNGLASSES



Base: Own more than one pair of sunglasses (308)

Q1.6 You mentioned earlier that you own more than one pair of sunglasses. Which of the following best describes how you use these sunglasses?

SELECTING WHICH PAIR OF SUNGLASSES TO WEAR



Base: Regularly alternate between sunglasses (57)

Q1.7 Which of the following influence your decision on which pair of sunglasses to wear?

Usage of Multiple Pairs of Sunglasses

- Victorians are significantly more likely to alternative between multiple pairs of sunglasses compared to the other states and territories.

USAGE OF MULTIPLE PAIRS OF SUNGLASSES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	308	152	156	107	98	103	85	88	50	42	43
One main pair worn most of the time others kept as spares	47	48	46	47	52	42	52	41	50	40	51
One main pair worn most of the time and occasionally wear others	35	31	38	37	29	38	38	30	42	31	35
Regularly alternate between sunglasses	19	21	16	16	19	20	11	30▲	8	29	14
Q1.6 You mentioned earlier that you own more than one pair of sunglasses. Which of the following best describes how you use these sunglasses?											



Purchase Decisions

Frequency of Purchase

- The majority (62%) of survey respondents had purchased a pair of non-prescription sunglasses in the last 12 months.
- More than three in four respondents (77%) replace or update their sunglasses at least once every two years.

LAST PURCHASE OF SUNGLASSES

In the last 6 months 34%

6-12 months ago 39%

18 months ago 15%

2 years ago 12%

Base: All Respondents (500)

S5 When did you last purchase a pair of non-prescription sunglasses for your own personal use?

FREQUENCY OF REPLACING/UPDATING SUNGLASSES

Every 6 months or more 11%

Every 6-12 months 27%

Every 1-2 years 39%

Every 3-4 years 15%

Every 5-6 years 3%

Less often 5%

Base: All respondents (500)

Q1.2. Approximately how often do you replace or update your sunglasses?

Frequency of Purchase

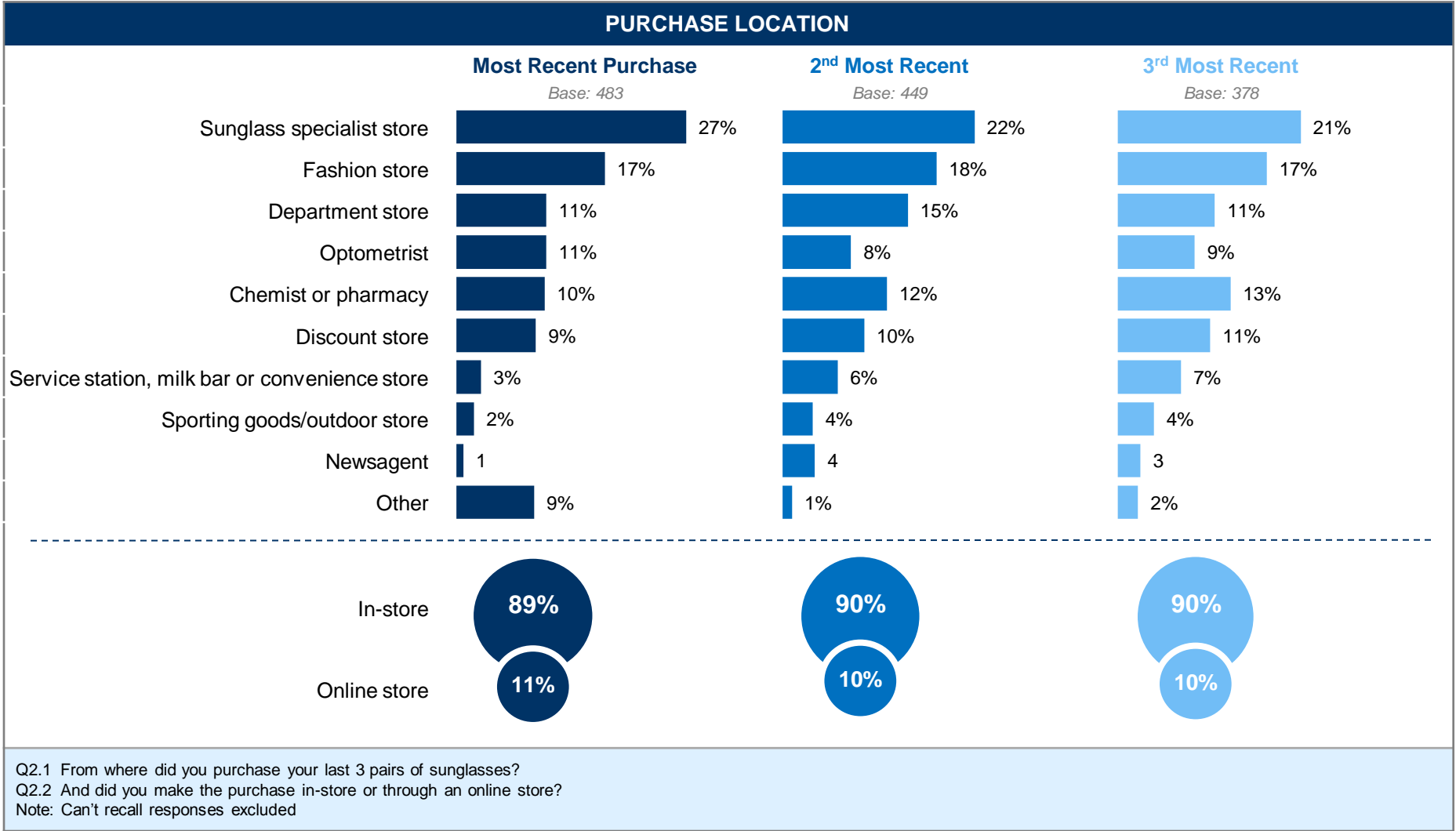
- Those aged 45+ years are purchasing sunglasses less frequently than the younger age groups.

LAST PURCHASE OF SUNGLASSES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
In the last 6 months	34	32	36	40	38	23 ▼	30	37	34	35	31
6-12 months ago	39	41	38	41	40	37	45	35	38	35	42
18 months ago	15	16	15	12	14	21	14	15	18	20	12
2 years ago	12	12	12	8	8	19 ▲	11	12	11	9	15
S5 When did you last purchase a pair of non-prescription sunglasses for your own personal use?											

FREQUENCY OF REPLACING/UPDATING SUNGLASSES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Every 6 months or more often	11	12	10	16	12	4 ▼	10	11	9	12	12
Every 6-12 months	27	24	31	34	34	14 ▼	22	29	34	26	29
Every 1-2 years	39	42	36	34	37	47	42	39	34	43	37
Every 3-4 years	15	14	15	9	11	25 ▲	16	16	14	15	11
Every 5-6 years	3	2	4	1	3	5	3	2	6	2	3
Less often	5	6	4	5	4	5	7	3	4	2	8
Q1.2. Approximately how often do you replace or update your sunglasses?											

Purchase Location

- On the most recent purchase occasion, the most common purchase locations were specialist sunglass stores and fashion stores.
- The vast majority of purchases were made in-store – around one in ten purchased from an online store.



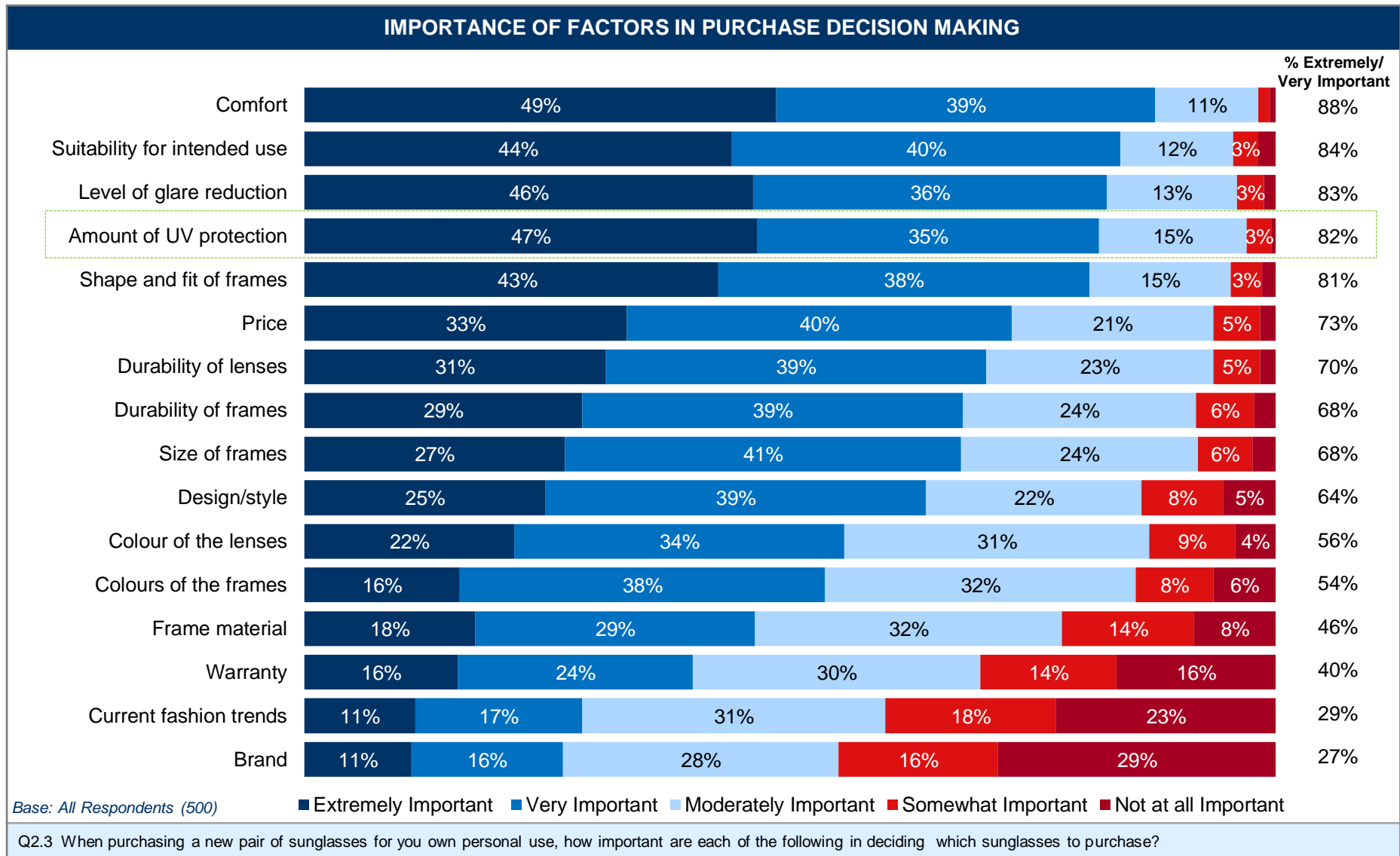
Purchase Location – Most Recent Purchase

- The younger age segment is more likely to be purchasing sunglasses from fashion stores whilst those aged 30-44 years are more likely to be purchasing from sunglass specialist stores.
- There is a higher incidence of purchasing sunglasses from optometrists and chemist within the 45+ year age segment.
- Males and those living in SA/NT are significantly more likely to have purchased sunglasses online.

LAST PURCHASE OF SUNGLASSES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	483	238	245	162	159	162	143	138	75	65	62
Sunglass specialist store	27	29	25	23	37▲	21	27	24	39	20	27
Fashion store	17	15	20	31▲	16	5▼	21	14	13	20	19
Department store	11	10	11	10	11	10	10	9	13	8	13
Optometrist	11	11	10	9	6	17▲	13	11	7	11	8
Chemist or pharmacy	10	10	11	4▼	9	18▲	4	14	15	14	6
Discount store	9	8	11	6	8	14	14	9	7	5	8
Service station, milk bar or convenience store	3	4	2	4	4	0	1	5	1	5	2
Sporting goods/outdoor store	2	3	1	1	2	3	2	1	1	5	2
Newsagent	1	1	0	1	1	0	1	1	0	2	2
Other	9	8	10	10	5	12	6	12	4	12	13
In-store	89	86▼	93▲	86	91	91	92	88	95	89	78▼
Online store	11	14▲	7▼	14	9	9	8	12	5	11	22▲
Q2.1 From where did you purchase your last pair of sunglasses?											
Q2.2 And did you make the purchase in-store or through an online store?											

Purchase Decisions – Importance

- The level of UV protection is amongst the most important purchase decision factors – 82% consider this to be extremely or very important when deciding which sunglasses to purchase. Glare reduction is also a critical factor for most.



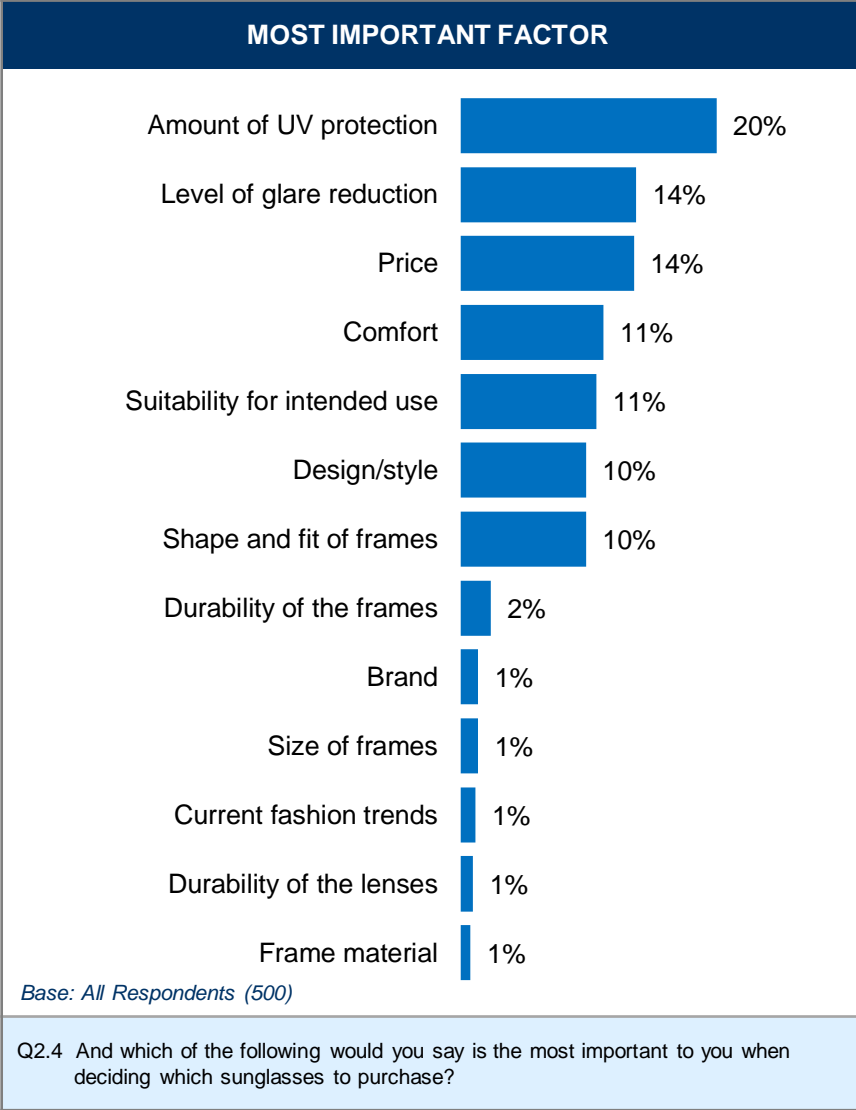
Purchase Decisions – Importance

- Those aged 18-29 years are significantly less likely to rate glare reduction and UV protection as important.
- Females are more likely than males to rate shape/fit, size and style of frames as important.
- Those aged 45+ years view glare reduction as highly important and are less focussed on fashion trends and brands.

FACTORS IMPORTANT IN PURCHASE DECISION – IN DETAIL											
% Rate as extremely or very important	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Comfort	88	84	92	84	91	88	83	88	93	95	83
Suitability for intended use	84	81	87	77 ▼	88	87	77	88	89	88	82
Level of glare reduction	83	83	82	69 ▼	86	93 ▲	79	86	84	83	83
Amount of UV protection	82	83	81	74 ▼	84	88	82	80	81	82	86
Shape and fit of frames	81	73 ▼	88 ▲	79	86	78	76	81	86	85	80
Price	73	71	75	76	76	66	70	70	78	77	74
Durability of lenses	70	73	68	64	72	75	70	70	73	75	63
Durability of frames	68	69	66	68	68	67	67	68	66	72	66
Size of frames	68	62 ▼	74 ▲	69	74	60	61	68	74	71	69
Design/style	64	56 ▼	72 ▲	71	72	50 ▼	59	62	66	68	72
Colour of the lenses	56	52	59	56	58	53	57	55	60	48	57
Colours of the frames	54	48	59	59	61	41 ▼	50	55	51	54	62
Frame material	46	51	42	45	52	42	39	52	43	49	51
Warranty	40	44	36	40	42	38	36	41	43	40	43
Current fashion trends	29	28	29	35	37 ▲	14 ▼	27	30	28	18	42
Brand	27	30	23	31	35 ▲	15 ▼	25	24	28	22	40
Q2.3 When purchasing a new pair of sunglasses for you own personal use, how important are each of the following in deciding which sunglasses to purchase?											

Most Important Purchase Factor

- When asked to nominate the most important factor when deciding which sunglasses to purchase, one in five indicate that UV protection is the most important factor.



Most Important Purchase Factor

- When focussing on the younger age group (18-29 years), more people nominate design and style as the most important factor (20%) than UV protection (15%).

MOST IMPORTANT FACTOR – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Amount of UV protection	20	18	23	15	18	28	23	20	26	11	17
Level of glare reduction	14	16	12	8	14	21	11	19	11	11	17
Price	14	18	10	16	16	9	14	14	11	20	9
Comfort	11	11	12	11	16	7	9	9	13	22	11
Suitability for intended use	11	12	9	7	7	19▲	11	10	11	12	11
Design/style	10	9	11	20▲	5	5	13	8	6	11	12
Shape and fit of frames	10	7	13	10	13	7	8	10	18	5	11
Durability of the frames	2	1	4	3	2	2	1	5	1	3	0
Brand	1	2	1	2	1	1	1	1	0	3	3
Size of frames	1	1	2	2	1	1	1	1	1	2	2
Current fashion trends	1	0	2	2	1	0	3	1	0	0	2
Durability of the lenses	1	2	0	1	2	0	1	1	1	2	0
Frame material	1	1	0	2	1	0	1	1	0	0	2
Q2.4 And which of the following would you say is the most important to you when deciding which sunglasses to purchase?											

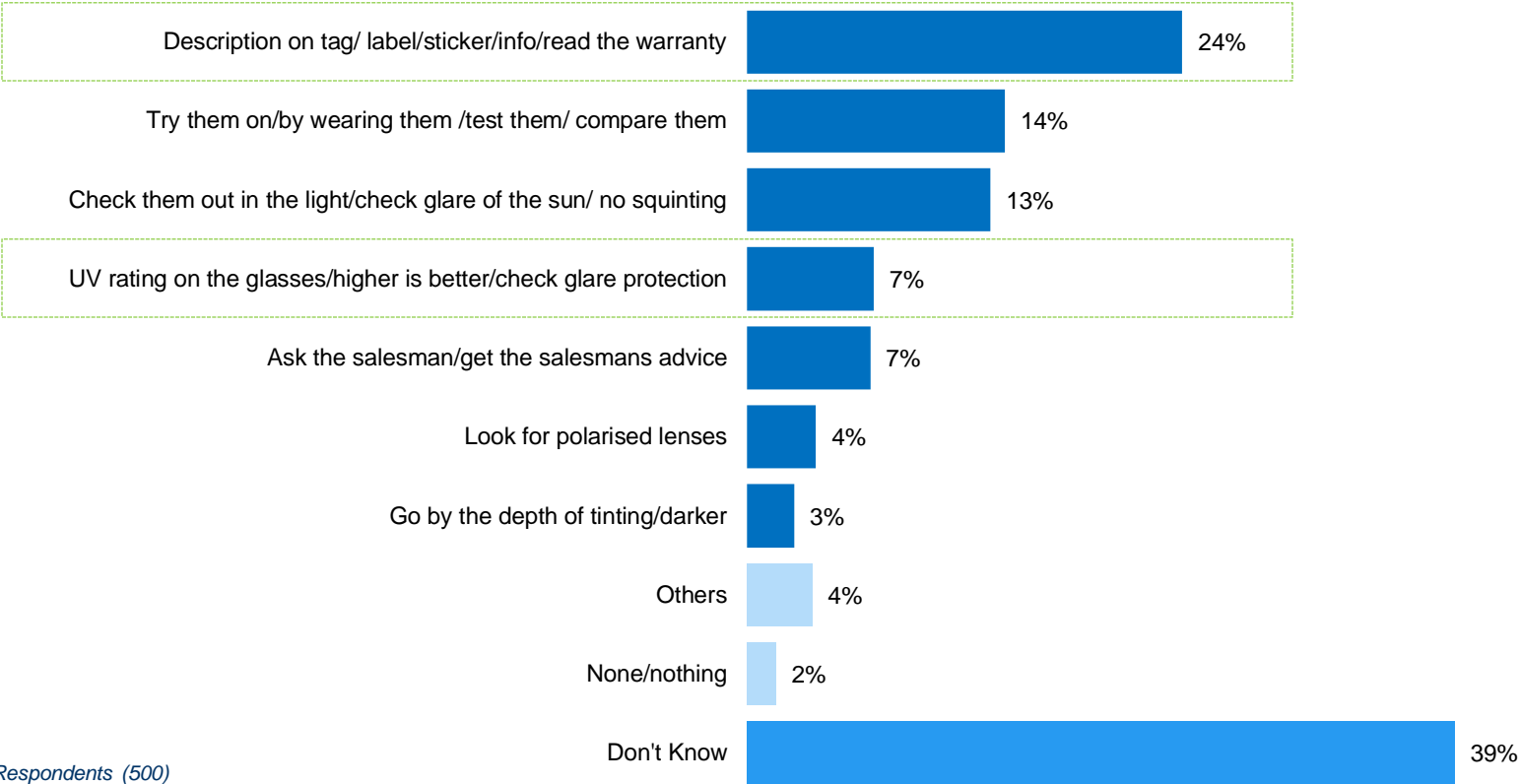


Awareness of Lens Categories

Lens Classification Awareness – Unprompted

- Respondents were asked to describe how they would evaluate the level of glare reduction and amount of UV protection.
- Around 3 in 10 (29%) make reference to the UV rating or sticker/label.
- Almost 4 in 10 are unsure how they would evaluate glare reduction and UV protection.

EVALUATING LEVEL OF GLARE REDUCTION AND UV PROTECTION

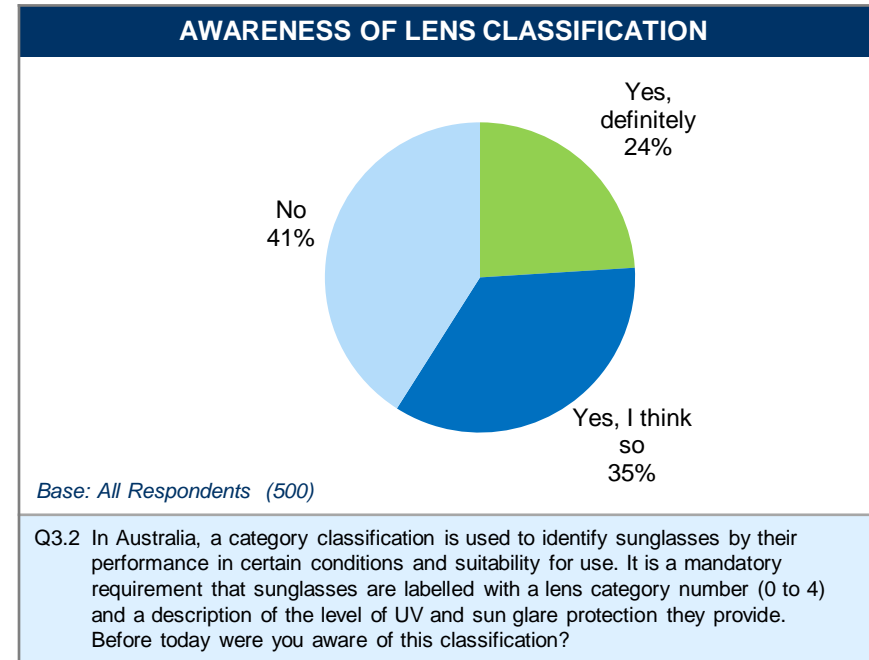


Base: All Respondents (500)

Q3.1 When purchasing sunglasses, how would you evaluate the level of glare reduction and amount of UV protection?
Note: Responses 1% or less are not displayed

Lens Classification Awareness – Prompted

- Around one in four survey respondents are definitely aware, and a further one third think they are aware of the lens classification.



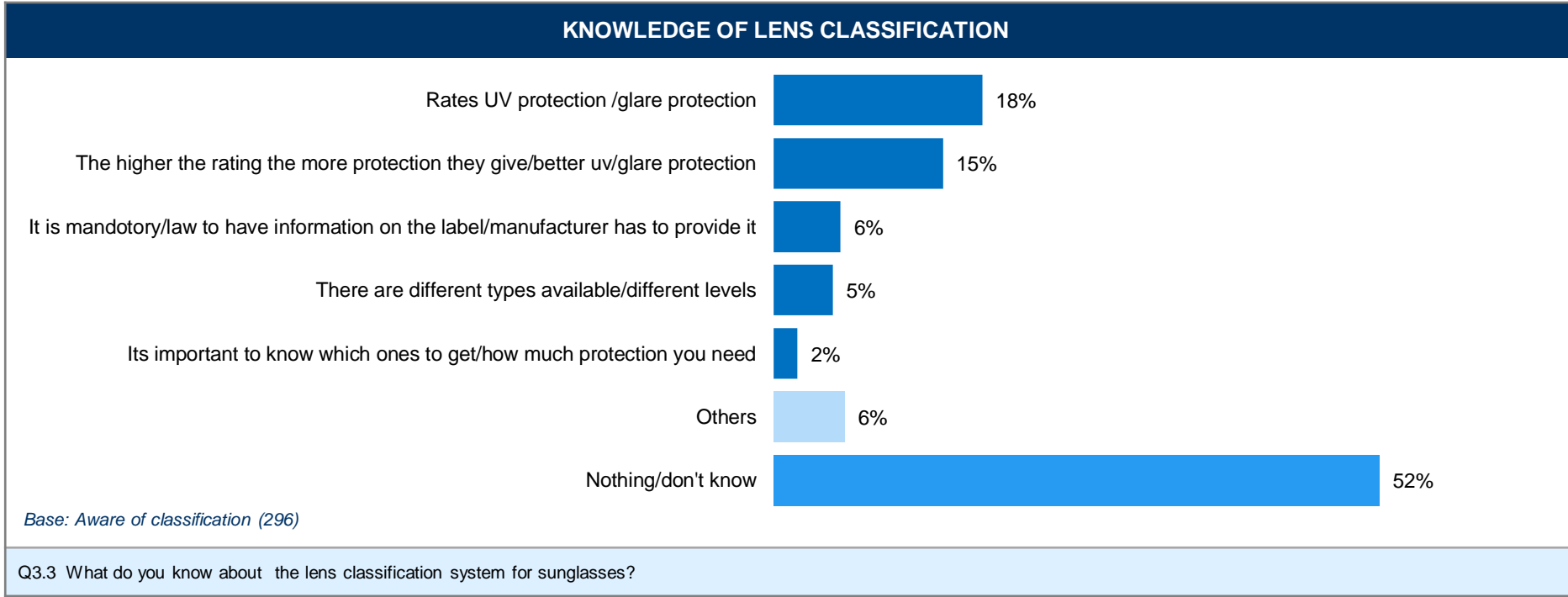
Lens Classification Awareness

- The level of awareness of the lens classification system is largely consistent across all segments with no significant differences noted.

AWARENESS OF LENS CLASSIFICATION – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Yes, definitely	24	26	22	25	27	21	17	23	31	23	35
Yes, I think so	35	32	38	33	36	36	39	39	34	28	25
No	41	42	40	42	38	43	43	38	35	49	40
Q3.2 In Australia, a category classification is used to identify sunglasses by their performance in certain conditions and suitability for use. It is a mandatory requirement that sunglasses are labelled with a lens category number (0 to 4) and a description of the level of UV and sun glare protection they provide. Before today were you aware of this classification?											

Lens Classification Knowledge

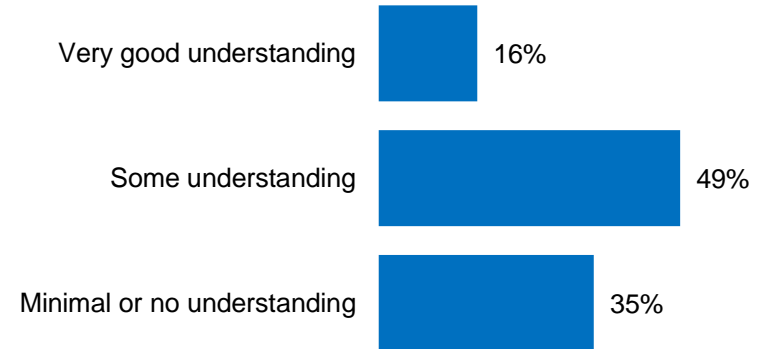
- Those aware of the lens classification system were asked to describe what they know about it.
- Close to one in five were aware that it provides a rating of UV and glare protection – 15% could specify that the higher the rating the more protection provided. A small proportion (6%) were aware that it is a mandatory requirement.
- Around half were unable to provide any further detail about the classification.



Lens Classification – Knowledge and Perceived Usefulness

- Of those aware of the lens classification, the majority do not have extensive knowledge about the classification.
- Despite low levels of knowledge, the majority of those aware believe the lens classification is an extremely or very useful tool.

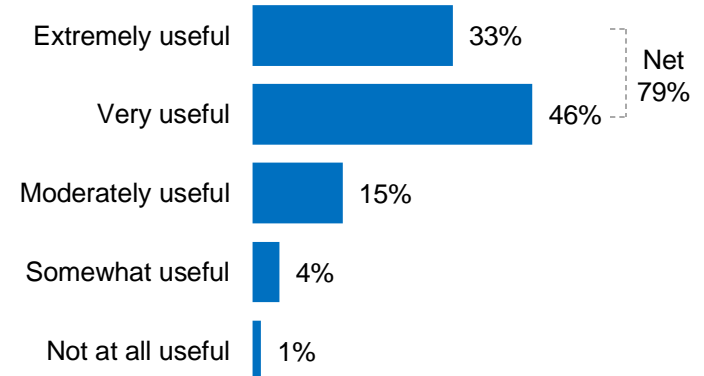
KNOWLEDGE ABOUT LENS CLASSIFICATION



Base: Aware of classification (296)

Q3.4 Which of the following best describes your knowledge of the classification for sunglasses?

PERCEIVED USEFULNESS OF LENS CLASSIFICATION



Base: Aware of classification (296)

Q3.5 How useful do you think it is to have this type of lens category classification for sunglasses?

Lens Classification – Knowledge and Perceived Usefulness

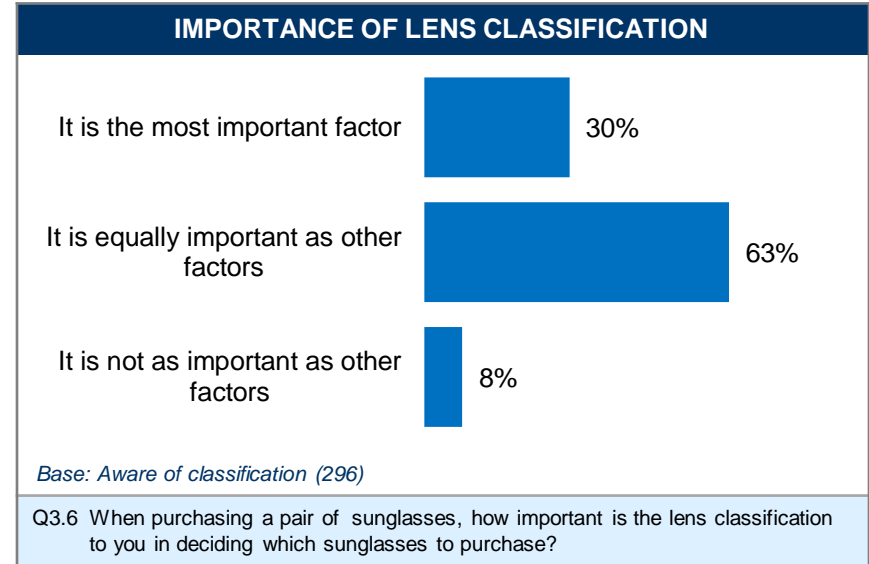
- Level of knowledge and perceptions around the usefulness of the classification system were consistent across all segments with no significant differences noted.

KNOWLEDGE ABOUT LENS CLASSIFICATION – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	296	146	150	99	103	94	82	90	52	33	39
Very good understanding	16	17	14	15	22	9	16	16	12	12	23
Some understanding	49	50	48	45	50	52	48	48	62	55	33
Minimal or no understanding	35	33	38	39	28	39	37	37	27	33	44
Q3.4 Which of the following best describes your knowledge of the classification for sunglasses?											

PERCEIVED USEFULNESS OF LENS CLASSIFICATION – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	296	146	150	99	103	94	82	90	52	33	39
Extremely useful	33	31	35	30	34	35	33	34	35	27	33
Very useful	46	48	45	44	46	49	49	41	46	58	44
Moderately useful	15	14	15	17	18	9	7	21	17	15	13
Somewhat useful	4	5	4	5	1	7	7	3	2	0	8
Not at all useful	1	2	1	3	1	0	4	0	0	0	3
Q3.5 How useful do you think it is to have this type of lens category classification for sunglasses?											

Importance of Lens Classification

- Approximately one third of those aware of the lens classification believe it is the most important factor when deciding which sunglasses to purchase.
- The majority (63%) believe the classification is equally important as other factors.
- Around one in ten believe that other factors are more important in their purchase decision than the lens classification.
- 18-29 year olds were the least likely to consider the lens classification to be the most important factor



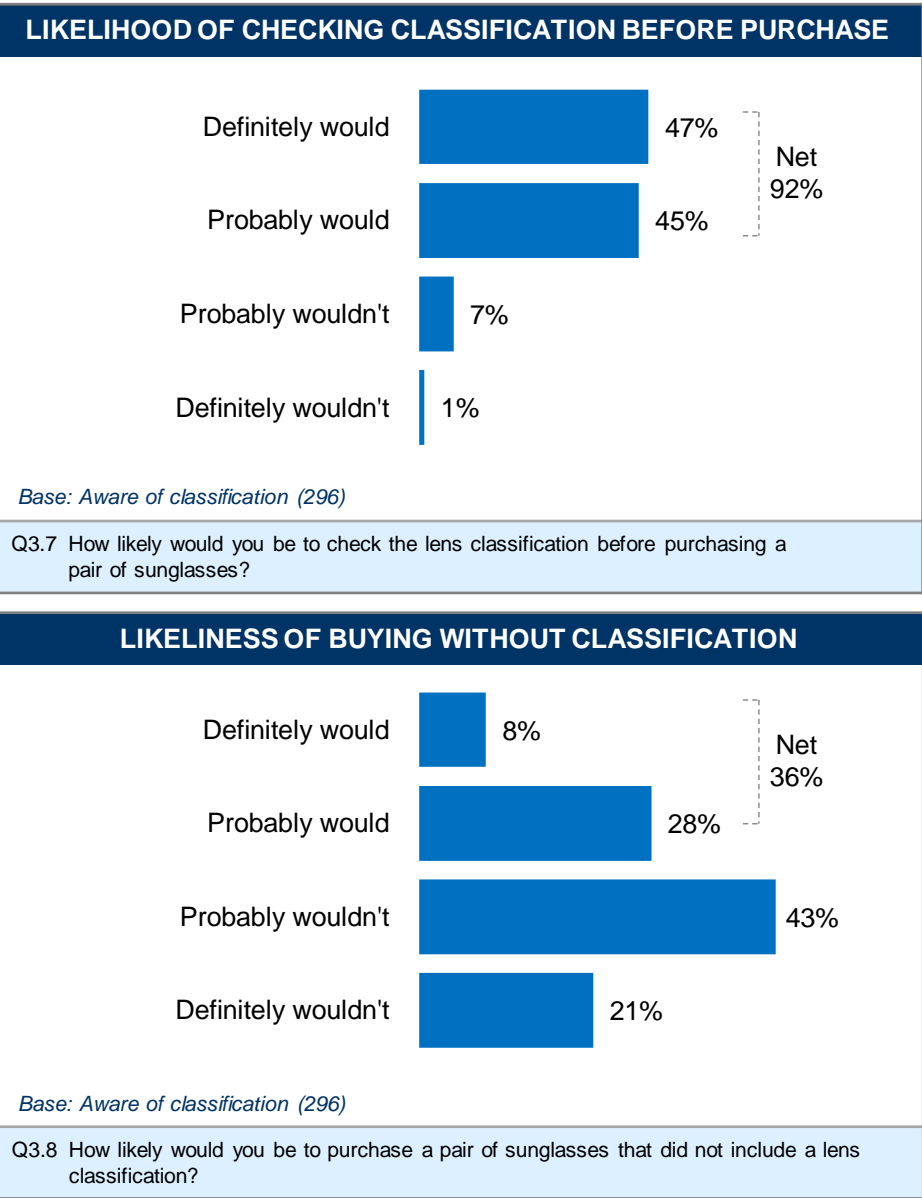
Importance of Lens Classification

- Results for the level of importance of the lens classification are consistent across all segments – no significant differences are evident.

IMPORTANCE OF LENS CLASSIFICATION – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	296	146	150	99	103	94	82	90	52	33	39
It is the most important factor	30	29	30	22	36	31	28	30	27	39	28
It is equally important as other factors	63	63	62	68	57	63	62	63	67	55	62
It is not as important as other factors	8	8	8	10	7	6	10	7	6	6	10
Q3.6 When purchasing a pair of sunglasses, how important is the lens classification to you in deciding which sunglasses to purchase?											

Intention to Check Classification

- Of those aware of the lens classification, the vast majority (92%) would definitely or probably check the lens classification before purchasing a pair of sunglasses.
- Around one third would purchase a pair of sunglasses regardless of whether the product includes a lens classification.



Intention to Check Classification

- Those aged 45+ years are more inclined to check the lens classification before purchasing – they are also less likely to purchase sunglasses that do not have a lens classification.

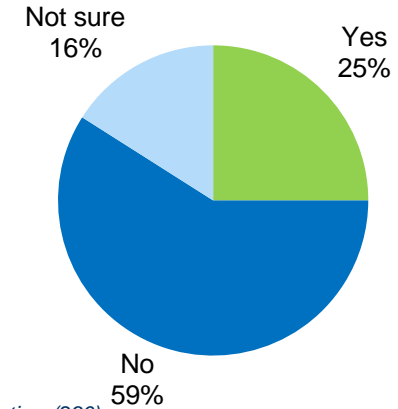
LIKELIHOOD OF CHECKING CLASSIFICATION BEFORE PURCHASE – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	296	146	150	99	103	94	82	90	52	33	39
Definitely would	47	42	51	37	43	62 ▲	43	48	54	45	46
Probably would	45	49	41	48	53	32 ▼	49	46	40	45	41
Probably wouldn't	7	8	7	12	4	6	6	7	6	9	13
Definitely wouldn't	1	1	0	2	0	0	2	0	0	0	0
Q3.7 How likely would you be to check the lens classification before purchasing a pair of sunglasses?											

LIKELINESS OF BUYING WITHOUT CLASSIFICATION – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	296	146	150	99	103	94	82	90	52	33	39
Definitely would	8	10	7	14	11	0 ▼	6	10	10	3	13
Probably would	28	30	26	34	33	16 ▼	30	32	15	27	31
Probably wouldn't	43	42	43	42	40	46	39	36	52	52	46
Definitely wouldn't	21	18	23	9 ▼	17	38 ▲	24	22	23	18	10
Q3.8 How likely would you be to purchase a pair of sunglasses that did not include a lens classification?											

Lens Classification Information

- The proportion of consumers who have retained information about the lens classification from their last sunglass purchase is 25%.
- Of these, a notable proportion (65%) have subsequently referred to the information.

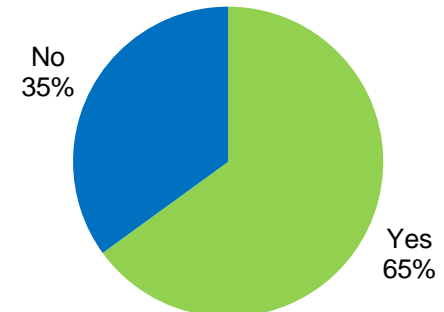
RETAINED INFORMATION ABOUT LENS CLASSIFICATION



Base: Aware of classification (296)

Q3.9 Thinking about the last time you purchased a pair of sunglasses, did you keep any information about the lens category or the description of the level of UV and sun glare protection?

REFERRED TO LENS CLASSIFICATION INFORMATION



Base: Kept information from last purchase (74)

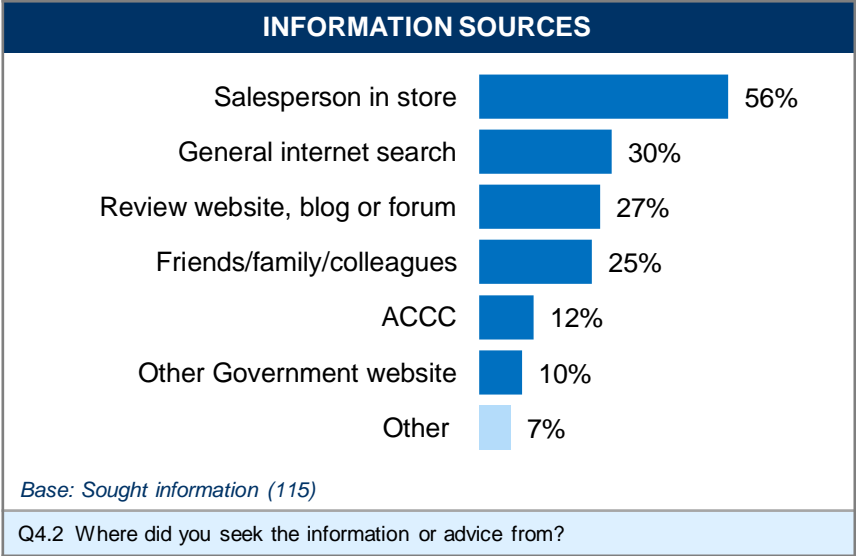
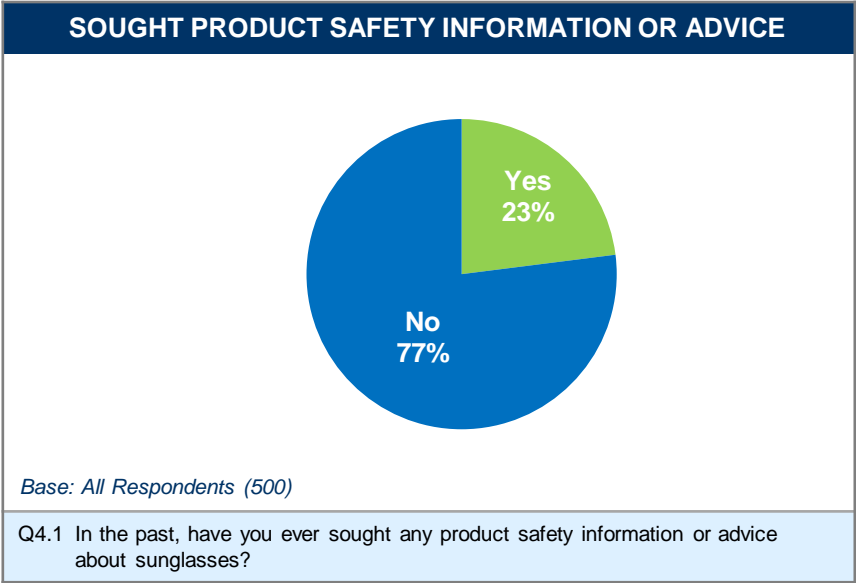
Q3.10 Since the purchase, have you ever referred to the information about the lens category or the description of the level of UV and sun glare protection?



Information Sources

Product Safety Information

- Approximately one in four consumers have sought product safety information or advice about sunglasses.
- The most common sources of information and advice were salespeople, internet searching product review websites or forums and friends or family.
- Of those who have sought information or advice, around one in ten contacted the ACCC.



Product Safety Information

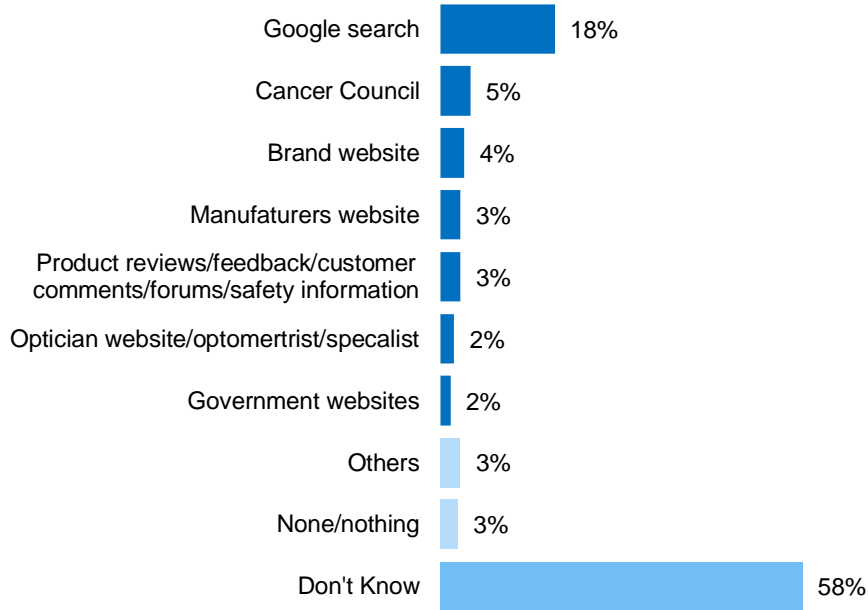
- The incidence of seeking product safety information or advice about sunglasses is relatively consistent across all segments.

SOUGHT PRODUCT SAFETY INFORMATION OR ADVICE – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Yes, have sought information or advice	23	25	21	24	24	21	22	24	25	23	20
No, have not sought information or advice	77	75	79	76	76	79	78	76	75	77	80
Q4.1 In the past, have you ever sought any product safety information or advice about sunglasses?											

Social Media Usage

- When looking for information about product safety online, a Google search is the most common way to find information. There is no particular website, blog or forum that is commonly used. More than half are not sure how they would source information online about sunglasses product safety.
- Facebook is the most popular social media channel with two thirds regularly using this media. YouTube and Google+ are also popular social media channels.
- One in six do not use any social media.

ONLINE INFORMATION SOURCES

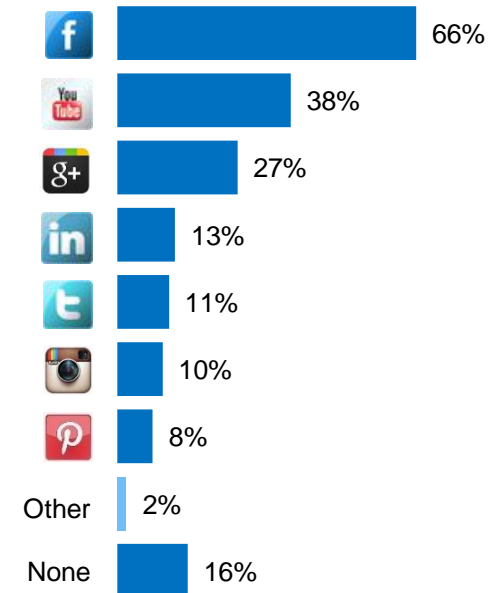


Base: All Respondents (500)

Q4.3 If you were looking for information about product safety, what websites, blogs or online forums would you visit?

Note: Responses 1% or less not displayed

SOCIAL MEDIA USAGE










Base: All Respondents (500)

Q4.4 Which of the following types of social media do you use regularly?

Social Media Usage

- Females are significantly more likely than males to be using Facebook and Pinterest.
- Those aged 45+ years are significantly less likely to be using social media than younger age groups, however a significant proportion (73%) are using at least one social media channel. Google+ is more common in this age group compared to the younger age segments.
- LinkedIn is most common in NSW/ACT.

SOCIAL MEDIA USAGE – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
	66	59 ▼	73 ▲	81 ▲	67	50 ▼	68	65	70	55	71
	38	43	34	59 ▲	33	22 ▼	46	37	26	35	43
	27	26	27	21	25	35 ▲	21	34	24	22	29
	13	13	12	15	14	9	21 ▲	9	13	5	12
	11	14	9	19 ▲	9	5 ▼	13	15	9	8	6
	10	7	13	19 ▲	10	1 ▼	8	12	14	8	8
	8	2 ▼	14 ▲	7	12	5	4	11	13	6	5
Other	2	1	3	4	1	1	2	1	1	3	3
None	16	18	13	4 ▼	16	27 ▲	19	14	15	22	8

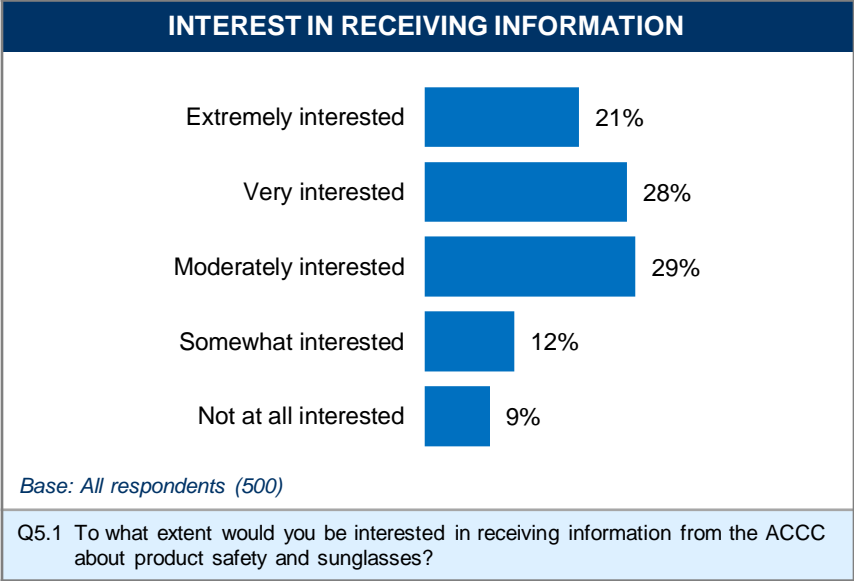
Q4.4 Which of the following types of social media do you use regularly?



Information Campaign

Interest in Receiving Product Safety Information about Sunglasses

- There is high interest in receiving information from the ACCC – more than three in four are at least moderately interested.



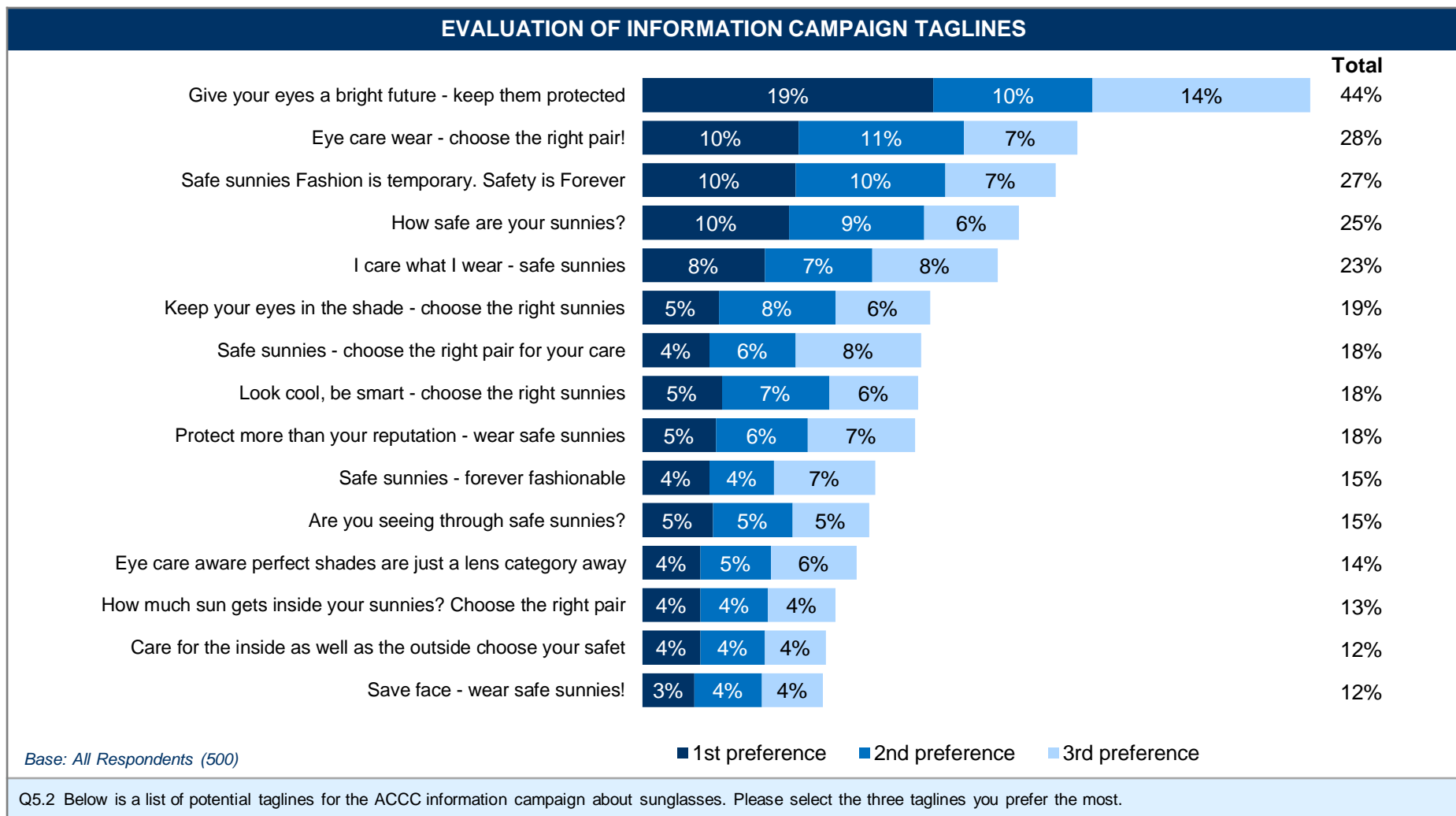
Interest in Receiving Product Safety Information about Sunglasses

- The level of interest in receiving information from the ACCC about product safety and sunglasses is relatively consistent across all segments.

INTEREST IN RECEIVING INFORMATION – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Extremely interested	21	22	21	15	25	24	24	18	26	20	18
Very interested	28	30	26	28	24	33	30	28	24	26	31
Moderately interested	29	30	29	31	31	25	27	30	31	34	25
Somewhat interested	12	10	15	14	12	12	11	14	9	8	22
Not at all interested	9	10	8	12	8	6	8	10	10	12	5
Q5.1 To what extent would you be interested in receiving information from the ACCC about product safety and sunglasses?											

Tagline Evaluation

- Of the campaign taglines evaluated, 'Give your eyes a bright future – keep them protected' was the most preferred. More than four in ten rate this tagline as either their first, second or third preference.



Tagline Evaluation

- 'Give your eyes a bright future – keep them protected' receives the highest preference across most segments.

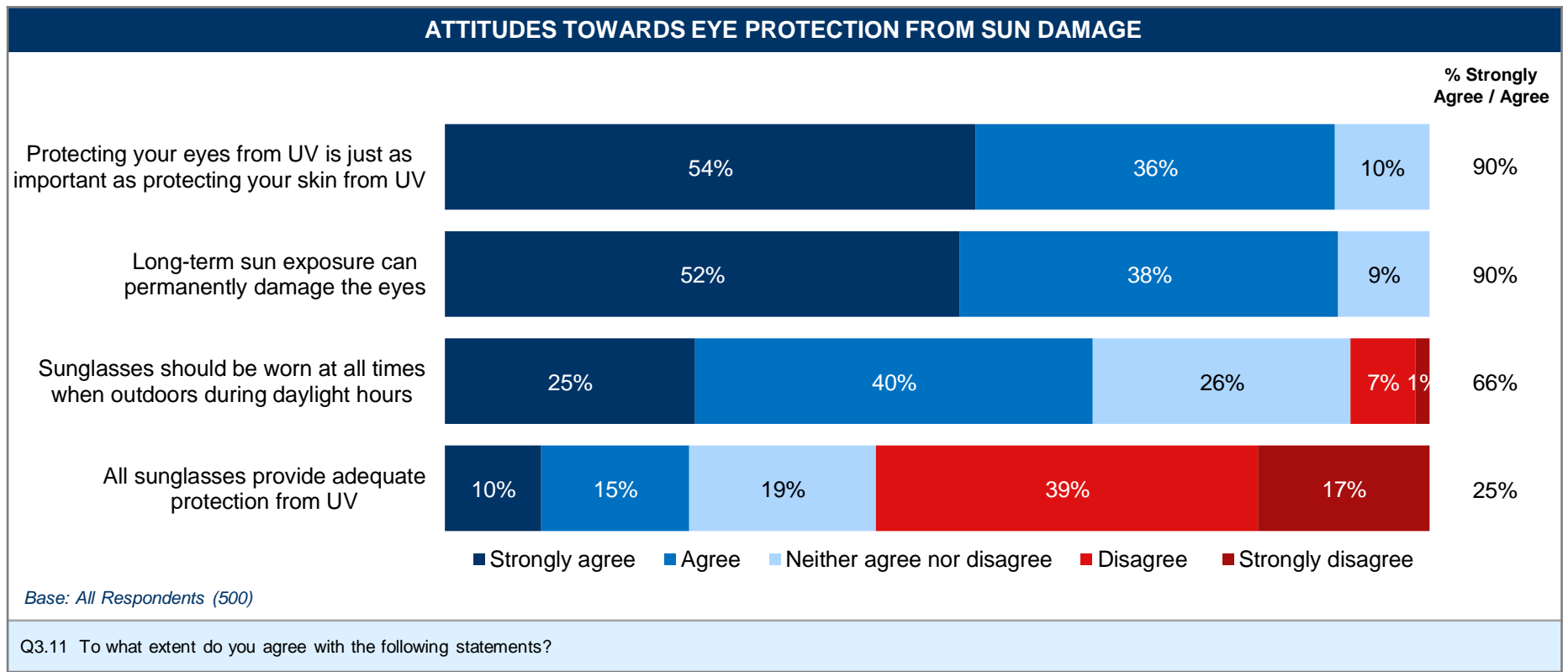
EVALUATION OF INFORMATION CAMPAIGN TAGLINES – IN DETAIL											
%	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Give your eyes a bright future - keep them protected	44	39	48	37	44	50	43	42	50	46	37
Eye care wear - choose the right pair!	28	30	27	25	31	29	27	27	29	25	38
Safe sunnies Fashion is temporary. Safety is Forever	27	24	30	25	28	28	29	24	35	32	14
How safe are your sunnies?	25	22	27	30	24	20	26	23	24	29	22
I care what I wear - safe sunnies	23	22	24	24	22	24	22	27	18	18	29
Keep your eyes in the shade - choose the right sunnies	19	21	16	12	19	26	22	23	15	11	15
Safe sunnies - choose the right pair for your care	18	19	17	17	18	20	21	21	14	15	14
Look cool, be smart - choose the right sunnies	18	19	17	18	19	17	17	18	18	17	22
Protect more than your reputation - wear safe sunnies	18	18	17	22	14	18	16	17	15	25	22
Safe sunnies - forever fashionable	15	15	16	16	16	13	16	14	19	14	12
Are you seeing through safe sunnies?	15	16	14	21	15	8	12	14	14	22	15
Eye care aware perfect shades are just a lens category away	14	13	15	14	13	15	15	12	13	12	20
How much sun gets inside your sunnies? Choose the right pair	13	16	9	14	15	9	10	14	8	20	12
Care for the inside as well as the outside choose your safety category sunnies	12	12	12	14	9	13	14	9	16	6	15
Save face - wear safe sunnies!	12	12	11	12	13	10	9	14	15	8	12
Q5.2 Below is a list of potential taglines for the ACCC information campaign about sunglasses. Please select the three taglines you prefer the most.											



Sun Exposure and Eye Damage

Attitudes Towards Eye Protection from Sun Damage

- There is high awareness of the importance of protecting eyes from UV – nine in ten agree that protecting your eyes is just as important as protecting your skin and also agree that long-term sun exposure can cause permanent damage.
- There is some uncertainty around whether sunglasses should be worn at all times when outdoors – two thirds agree whilst one in four are unsure.
- One in four agree that all sunglasses provide adequate protection from UV.



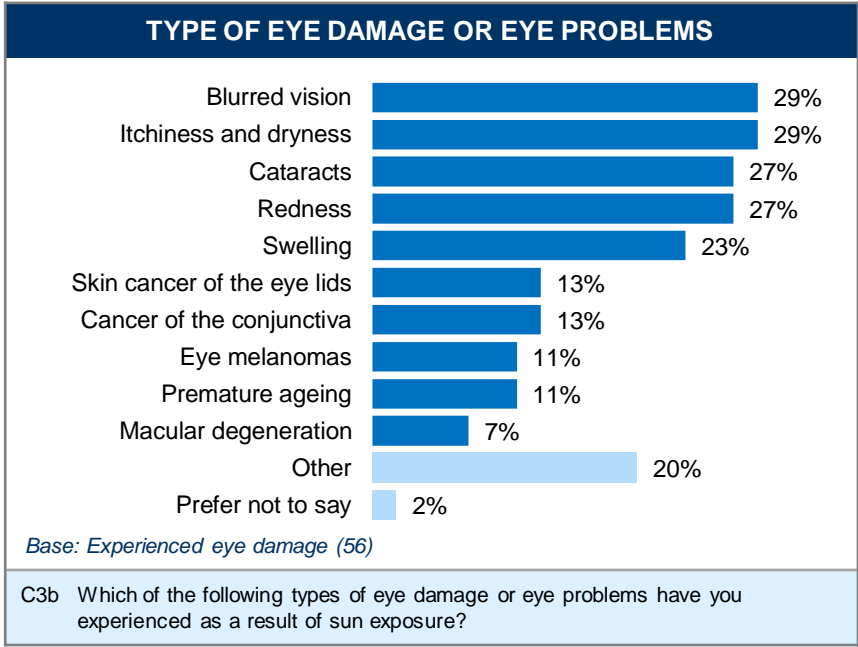
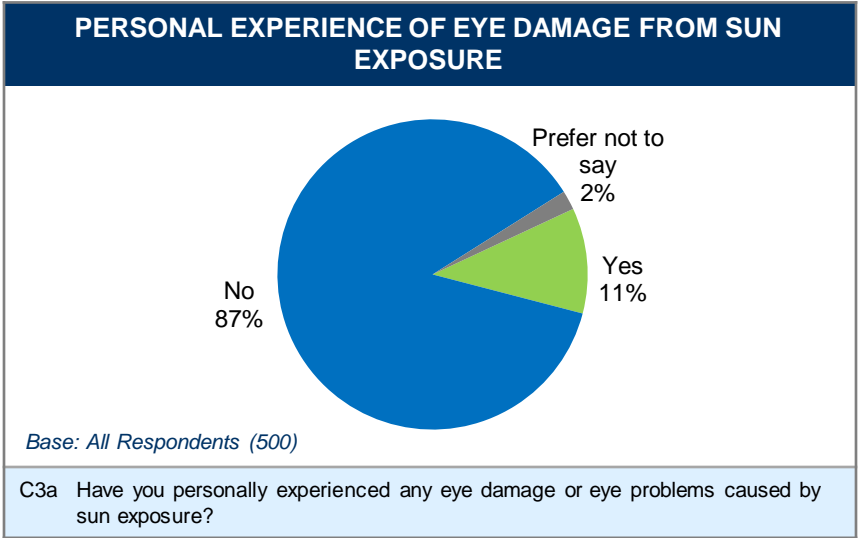
Attitudes Towards Eye Protection from Sun Damage

- Females are more likely than males to agree that protecting your eyes from UV is just as important as protecting your skin. Females are also more likely to agree that sunglasses should be worn at all times when outdoors.
- Those aged 45+ years are less likely to agree that all sunglasses provide adequate protection from UV.

ATTITUDES TOWARDS EYE PROTECTION FROM SUN DAMAGE – IN DETAIL											
% Strongly agree/agree	Total	Male	Female	18-29 years	30-44 years	45+ years	NSW/ACT	VIC/TAS	QLD	WA	SA/NT
Sample Size	500	250	250	170	165	165	145	145	80	65	65
Protecting your eyes from UV is just as important as protecting your skin from UV	90	86 ▼	94 ▲	88	90	93	90	90	89	92	91
Long-term sun exposure can permanently damage the eyes	90	88	92	88	91	92	88	89	86	95	97
Sunglasses should be worn at all times when outdoors during daylight hours	66	60 ▼	72 ▲	61	70	66	63	56 ▼	78	72	72
All sunglasses provide adequate protection from UV	25	31	18	29	29	16 ▼	23	28	18	18	38 ▲
Q3.11 To what extent do you agree with the following statements?											

Personal Experience of Eye Damage from Sun Exposure

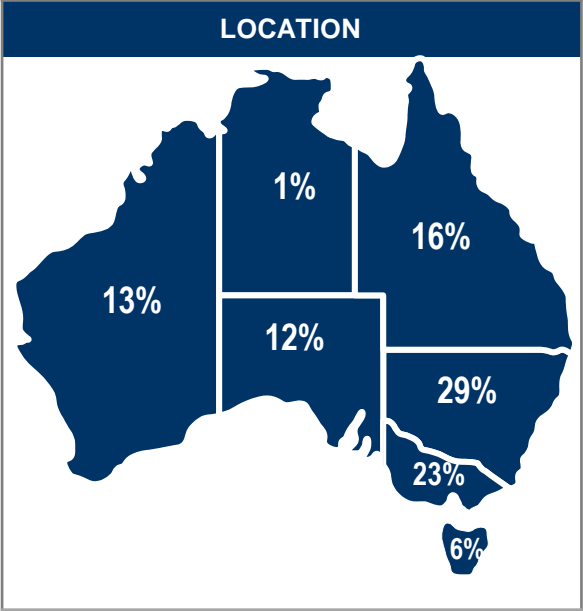
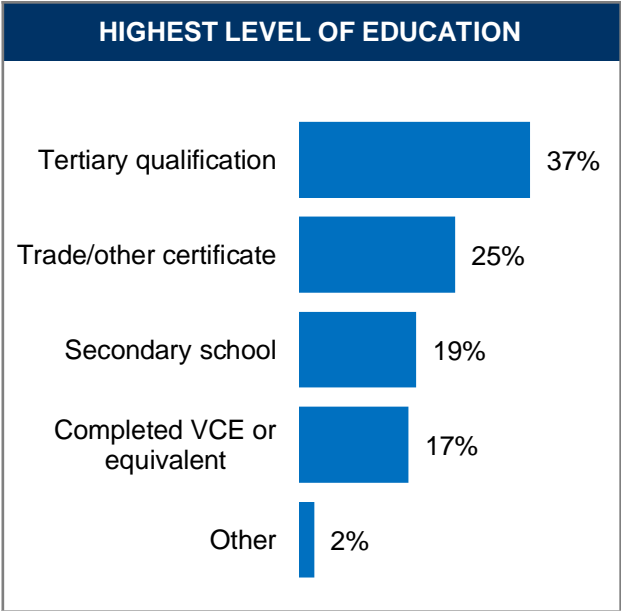
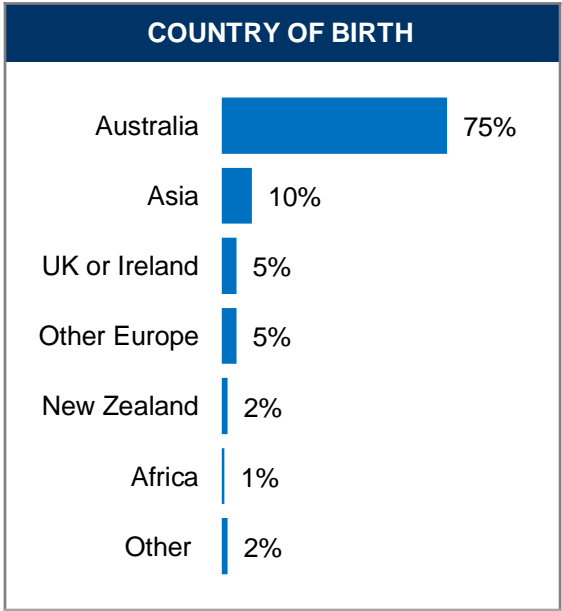
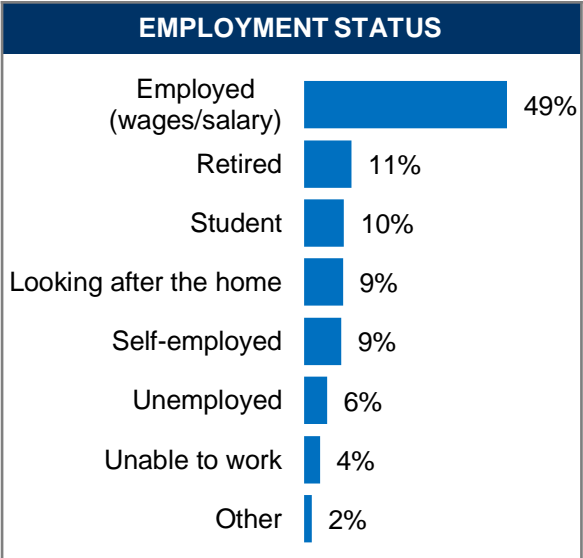
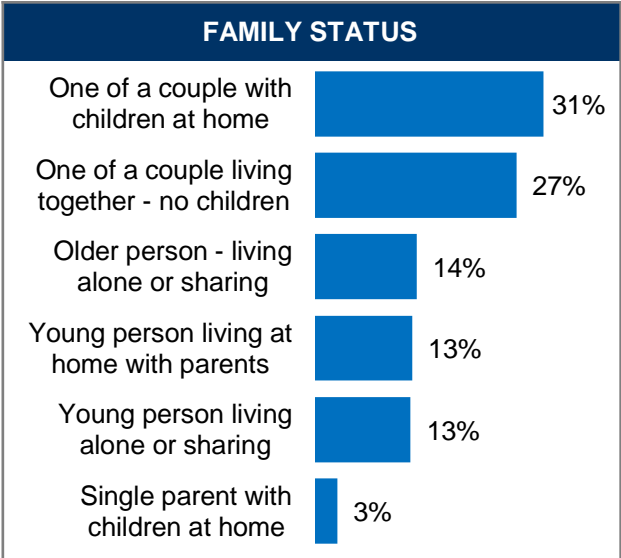
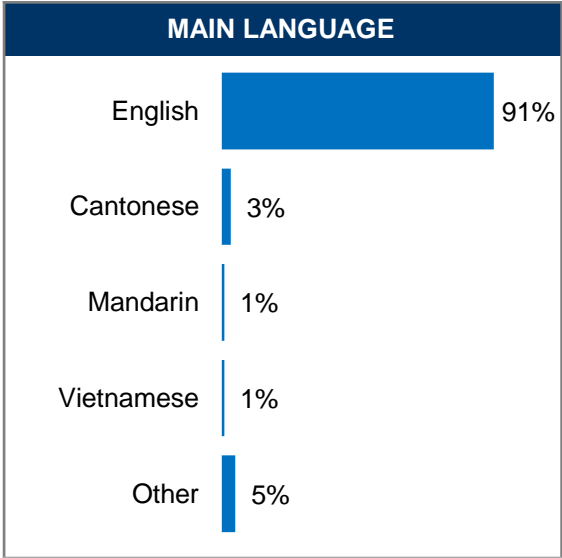
- Around one in ten survey respondents have personally experienced eye damage or eye problems caused by sun exposure.
- The most common problems include blurred vision, itchiness or dryness, cataracts, redness and swelling.





Sample Classification

Residential Sample Profile





MELBOURNE
L1, 90 York Street
South Melbourne VIC 3205
T 61 3 9699 8466
F 61 3 8199 0172

SYDNEY
L1, 30-32 Market Street
Sydney NSW 2000
T 61 2 9262 3266
F 61 2 9262 5774

www.sweeneyresearch.com.au

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