



# SUNWEAR OUTLOOK

*Here Comes the Sun:  
Embracing Cautious Optimism*

Photographed by: ANNIE GALLAGHER BLACK BOX STUDIO

**By Deirdre Carroll**  
*Senior Editor*

NEW YORK—It is nearly impossible to go a day without hearing about some staggering effect caused by the recession we currently find ourselves mired in. Unemployment rates are up, businesses are closing their doors and consumer spending is at an all-time low.

VM's own How's Business survey (see VisionMonday.com) reflected the experiences of some of its readers: 33 percent of survey respondents indicated their plano sun sales were down 5 percent or more over last year's numbers. In addition, 27 percent said their Rx sun sales were down 5 percent or more over last year.

Though it is easy to get wrapped up in the alarming figures and dire predictions, focusing on the positive and taking steps to make it through these tough times is clearly more productive.

And that is exactly the philosophy

adopted by the suppliers and retailers VM spoke to for our 2009 Sunwear Outlook story. As we rang in the New Year, we learned that many suppliers are embracing efficiency at the start of 2009 by streamlining their assortments to take best advantage of tighter open to buy dollars. Retailers are re-emphasizing their core messages, be it stressing their value positioning, offering house brands as a means of increasing their dollar margin, or focusing on their Rx sun lens options. (More Sun Rx options are available

**“Retail is detail and our business is blocking and tackling and constantly watching all the details of the business.” — George Gebhardt, Eye Care Centers of America**

than ever, with an increased emphasis on ease of ordering for these new technologies. See Sidebar, page 26.)

Whatever approach they are taking, one message resonated repeatedly among those we talked to: like many in the country, the optical industry is approaching 2009 with cautious optimism.

#### For Auld Lang Syne

There is no denying the close of 2008 brought some challenges to the sunwear business on both the vendor and retailer sides, and in both the optical and non-optical retail channels.

“The last half of 2008 was difficult and sales were slow,” said Robert Henshillwood, Cachet sales director, L’Amy America. “Accounts were delaying their purchases, buying more selectively and gravitating toward more tried and true brands.”

“The second half of 2008 was a challenge,” agreed Lloyd Gitler, vice president of retail for Marchon. “The consumer tightened their wallets and ‘open to buys’ were reduced to keep in line with reduced sales budgets and shrinking market share.”

“Our business has been strong due to our value position in the marketplace and I am cautiously optimistic that will continue. We do a very good job of selling prescription sunwear and are seeing Rx sun gaining in importance,” said George Gebhardt, chief merchandising officer for Eye Care Centers of America (ECCA), with 424 locations throughout

the country. “Retail is detail and our business is blocking and tackling and constantly watching all the details of the business.”

On the retail side, Aaron Schubach, vice president of 15 Salt Lake City-based Standard Optical locations stated, “Our overall sun/plano business has been negatively hit by the economic conditions of 2008. Sales were flat through November and look to be flat for Q4 though weather conditions led to a significant increase in our plano sun and ski/snowboard goggle business in early December due to Utah being a ski destination.”

“We have felt a minor impact in our retailers’ inventory and open to buy dollars are being more scrutinized than ever,” added Bill Munch, national sales manager, retail sun, for Viva International Group. “We had to manage our retailers’ stock levels closely to maximize efficient inventories and optimal turn. Luckily, the economic downturn of 2008 is not affecting our core customer at the same level as the total market and sales for Viva’s retail division are trending up double digits over last year.”

“I did see customers making some changes in how and what they buy,”

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acknowledged Lee Birnbaum, southeast regional sales manager for ClearVision Optical. "Specifically, there was a deterioration of non-essential brands of sunwear without an inherent value proposition and we have noticed during tougher times more support for value which should prove to be very good for the ClearVision stable of products."

Rachel Sivi, co-owner of Real Optics with 21 locations throughout the Des Moines, Iowa area observed, "We have not seen a significant change to purchasing decisions. Our stores have never had a strong showing in the plano sunwear market and that didn't change in 2008, but we continue to see slight increases in the Rx sunwear side of the equation. In the past year, we decided to go with MSRP pricing to compete with the sun specialty and department stores because the average consumer wanted to spend very little on their sunglasses and we wanted to make the price as appealing as we could."

Kenmark's vice president of creative development, David Duralde, summed up the close of 2008 this way, "The economic conditions provided more of a challenge to us to offer product more aligned with the needs and wants of the consumer who has changed their purchasing dynamic. It has become imperative to anticipate what will drive them to buy sunwear in 2009."

#### After the Ball Drops

Many companies have taken the lessons they learned during the turbulent end of 2008 as incentive to re-think their opportunities heading into '09 and focus on those brands, messages and practices they believe will prove successful for them in the

New Year.

"People like to wear sunglasses, they make them feel good and look stylish. Even in the current economic climate that is our opportunity to take advantage of in the optical business," stated ClearVision's Birnbaum. "Our strategy is to offer a broad range of products at different price points in order to supply our customers with what they need. We are releasing over 35 new sun styles and

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our pricing will take into consideration the marketplace generally."

Cachet's Henshillwood agreed. "Customers still need sunglasses and fashion brands drive that business. As a company, going forward we are optimistic and planning for an increase by broadening our distribution mostly on the West and East Coasts. To do this we'll focus on promotion, working with our customers to explore what products might fit their needs and help them with special programs. And though we will hold our prices in 2009 we will focus on the products within each line that carry a lower retail price."

"There is always an opportunity for both newness and value and our portfolio is strong and offers both," explained Marchon's Gitler. "All of our brands offer features and benefits and design—value and brand always resonates. We have simply ensured that we have all the right price bands covered in order to meet the needs of the customer while maintaining the integrity of the brands. By offering spectacular product, thoughtful deliveries, flow of newness and value for dollar we believe we will be successful."

Noted ECCA's Gebhardt, "We look at individual sales for every single store and make merchandising assortment decisions accordingly. We just keep pounding away at our value message offering a large assortment of fashionable, high-quality, value product and recommending

the best lenses for our sunwear buyers."

A spokesperson for Luxottica Retail said that, for their stores, Rx is gaining particular importance in the 30 environment. "Most vision correction patients need Rx sunwear and eyecare

professionals are making recommendations for prescription sunwear. At Luxottica, we are focusing on these needs to ensure that we address them properly. Many of Luxottica's sunglass styles are Rx-able and with the advent of new lens technologies Rx-ability is now a possibility beyond the average base curvature."

"Rx Sun has always had importance and wrap technology lenses have opened [up] some new opportunities for us as well," added Real Optics' Sivi. "If the economy continues to slow down we will have to address our buying habits so we can still offer higher fashions but perhaps without the designer's names to keep cost down."

Other retailers have also explored house brands as a way of building a

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**—Aaron Schubach, Standard Optical**

better dollar margin.

"The only sunwear we sell in our store are Viva brands and frames we source directly from factories in China," explained Gebhardt. (ECCA and Viva are subsidiaries of the Highmark Vision Group.) "We call them exclusive brands and market them as house collections. It allows us to constantly re-shuffle the styles, update the assortments and sell through and close out the product that is slowing down while introducing product that is more trend oriented. It keeps us new and fresh. We know that in retail if you don't differentiate you die."

Standard Optical's house brands include Schubach Originals and Schubach Classic Collection which will make up 25 percent of their product mix in 2009. "Our ventures in China have helped us manage our cost of goods sold by bringing in quality product, without a consumer brand name, but with the same quality at a fraction of the price. It not only allows for a lower retail [price] but has a better dollar margin," said Schubach.

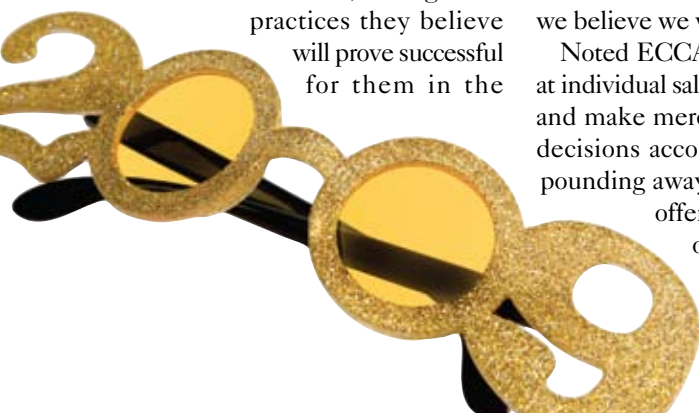
Of course, marketing and merchandising strategies have also gained new importance.

"As a 98-year old business, we have survived two world wars, several recessions and the Great Depression," continued Schubach. "We are prepared for a tough 2009 but our strategy is to increase media spend in all segments, especially 1-to-1 marketing and recall efforts and I believe the economy will see improvement by Q3 2009."

"In addition to keeping the assortment tight, fresh and showing a cohesive story of best sellers, you need to grab the consumer visually by telling a clear, concise and impactful story," added Viva's Munch. "Maximize consumer PR by working closely with the publications consumers read to fit your product into their trend, tech-

nology and other stories. Utilize in store images wherever possible to draw the consumer in."

"With four different store identities, marketing can be tricky," said Sivi, who's Real Optics stores operate under Vogue, Younkers, EyeMart and One Hour Optical names. "Some of the smaller, more rural locations may struggle more with the economy, so we will address direct marketing appropriately for them, but as long as nothing dramatic changes in our sales, I plan to advertise as fun and creatively as I can," she concluded. ■





# STYLE 2009

## VM'S TOP SUN TRENDS

### TWILIGHT



Twilight has an unusual, romantic quality that is often elusive, but in 2009 it can be captured on a wide selection of sunwear. Shades of blues and purples mix and swirl ranging from fresh, pale lilac hues to vivid and moody violets. Dusty or deep, lighthearted or sinister, purple is the color of the season.



- Oakley Will Barras Artist Collaboration Montefrio (top right) (Clockwise from top left)
- Cole Haan CH659 from ClearVision
- Karl Lagerfeld 105S from Marchon
- Chloe CL2170 Maypop from L'Amey America

### FUTURISTIC



Although our world is in constant change, nothing is truly new. The future of sunwear features classic, mod and retro shapes re-interpreted in fantastical new materials, colors and silhouettes. For Spring 2009, Futurism features plays on scale, radical proportions and frosty colors.

- Cazal 9007 from Eastern States (top right)
- FriezeFrames Hera from Fusion Eyewear (top)
- Tom Ford Limited Edition James Bond 007 from Marcolin (middle)
- Carolina Herrera H735 from Base Curve (bottom)



**By Deirdre Carroll**  
*Senior Editor*

Despite economic woes, there will always be consumers who just can't resist a new pair of shades. These intrepid shoppers, these 'Ressionistas' can only be wooed with the freshest designs. Here are **Vision Monday's** top four trend picks for the start of 2009.

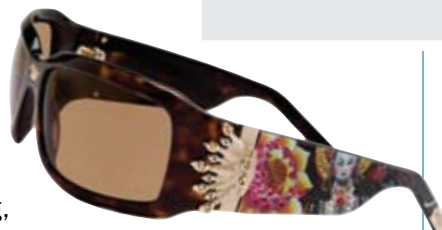
### NATIVE

With a desire to know our place in this ever shrinking world, sunwear design heading into 2009 displays a melting pot of cultural influences. Design elements like basket-

weaving,

Roman

coins, Hindu symbolism and Asian mythology are combined with modern details to merge our disparate cultures into one universal heritage.

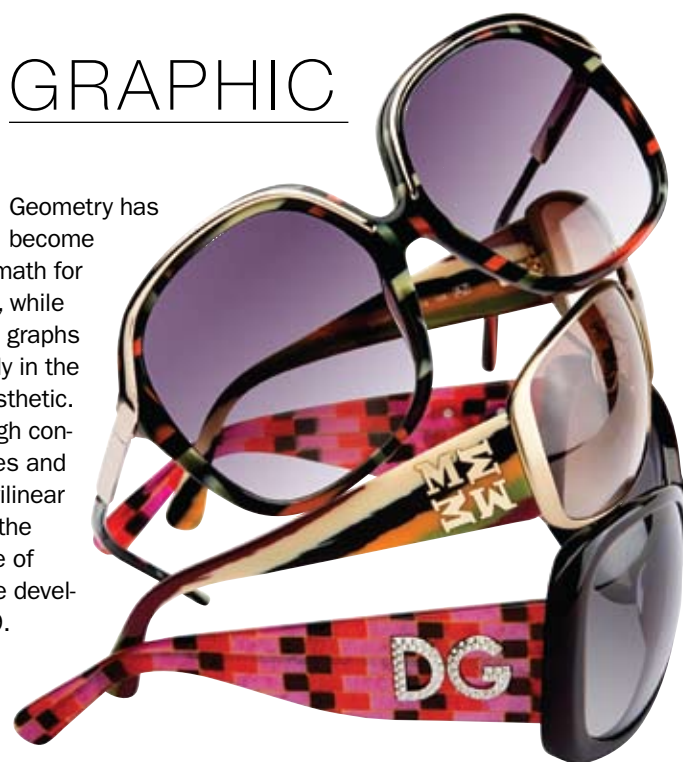


- Christian Audigier CAS412 from Revolution (top right) (Clockwise from top left)
- Shanghai Tang ST8080 from Mondottica
- Sama Sahara Nefer
- Bottega Veneta BV90/S from Safilo

### GRAPHIC

Geometry has become

the new fashion math for sunwear in 2009, while stripes, grids and graphs feature prevalently in the new sun style aesthetic. Color-blocking, high contrasts, dots, circles and rectilinear or curvilinear influences make the Graphic trend one of the most lucrative developments of 2009.



- (From top)
- 3.1 Philip Lim Emm from Modo
  - Missoni MI 59802 from Allison
  - Dolce & Gabbana DG4033B from Luxottica
  - Lilly Pulitzer Bamboozled from Kenmark (bottom left)



## EYEING THE NEW OPTIONS IN RX SUN

**By Marge Axelrad**  
*Editorial Director*

NEW YORK—The news in Rx Sunwear, by all accounts, is straightforward: the category presents an unequivocal upside opportunity for ECPs and optical retailers in 2009.

Best estimates of Rx sun's penetration of optical sales are hovering around the 15 percent mark according to most labs and supplier execs.

"Rx sunwear still provides one of the best opportunities for increased revenue even in this economic slowdown. The challenge is for ECPs to not forget that patients and consumers still want fashionable, trendy and performance Rx sunwear," stated Al Gleek, operations development director for Carl Zeiss Vision Sunlens. "Thinking that patients/

consumers might not wish to have a second pair or update their Rx sunwear by prejudging due to the economy or the total bill is a great risk. Vision plans cover sunwear and overall, it is low cost fashion/sport statement. Going forward, ECPs must gain every dollar from every patient that walks in the door and great Rx sunwear is an excellent opportunity to capture those dollars."

Noted Younger's president and CEO, David Rips, "During these times, fewer patients do walk



**Top: Dangerous glare is much reduced via Younger's Drivewear, which enables polarized photochromic lenses to change behind a car's windshield. Bottom: Maui Jim's new Passport series emphasizes Rx options.**

through the door, so it's important to offer each of these patients as many services as you can, and sunwear becomes vital since they're a value which the patient can use every day. It is also vital for eye health and protection and for driving for protection from the sun."

Added Dani LaGace, global director of eyewear product development for Bushnell, which markets the Serengeti and Bolle brands, "There will, , be opportunities for ECPs who possess the marketing skills to communicate the quality, durability and aesthetic advantages of premium frames, as well as the clear patient benefit to lens coatings and other technologies found in better sun products."

Suppliers formulating program plans for 2009 indicate that Rx Sun is likely to receive more visibility this year, in terms of advertising and marketing messages plus programs and series that facilitate ordering and processing, even for what were

traditionally tough categories, like high-base wrap lenses and complex performance features and tints

for fashion suns. At Oakley, Rob Iken, global program manager for the company's growing Rx lens business, said that 2009 will see Rx Sun aligned with all of Oakley's plano sun marketing. The push will be reflected in advertising and point-of-sale materials to tell consumers that sunwear is "Available with Oakley Authentic Prescription Lenses."

"Prescription sun is a higher value sale," said Iken, adding, "We want to help accounts by impacting their involvement with multiple pair sales."

Oakley's lens book, showcasing the range of colors/materials of lenses available will be accompanied in early 2009 with a new Rx Sun lens brochure to help ECPs educate patients. Also, Oakley's updated B2B Web site is designed to simplify the way accounts do business with Oakley to improve their efficiency and service. The site allows users to browse an online product catalog, place inventory and stock orders, and place orders for a range of products in addition to RX. Ninety-five percent of Rx orders are fulfilled within five business days, Iken said.

According to David Burch, Rx training manager, Maui Jim, "We're very dedicated to providing patented technology in Rx. We recognized early on that there is a loyal segment of customers that required something other than plano sunwear for active outdoor use. So, we built our full service 25,000-square foot Rx facility to duplicate the cosmetics, performance, and quality of our patented plano product. The new MauiPassport features digital technology to allow more opportunity to fit patients into the larger wrap designs."

At Rudy Project, there will be a range of new Rx options in the sun 2009 line (orders are processed via lab partner through Rudy Project). Brad Shapiro, principal, reported, "Our experience has shown that the biggest challenges are education, both from us to the dispenser and the dispenser to their patients. We have found that knowledge of how to fit and dispense 8-base wrap lenses is not widespread. To that end, last year we partnered with Jobson in sponsoring a CE course titled, 'High Performance Wrap Sunwear Made Easy—Boost Sales of an Untapped Market.'"

Shapiro added, "We now offer weekly webinars on how to fit and dispense our Rx sports products."

Rudy Project is just introducing its FreeForm TEK branded lenses, made from the exclusive ImpactRx material



**Clockwise, from top left: Carl Zeiss Sunlens' Spazio is designed for high-base curve wraps; Essilor's is emphasizing the Rx polarized message; Vision-Ease promotes its Coppertone brand Rx sun lenses – its 'Winter Sun Awareness Campaign' stresses the importance of premium eye protection year-round; and Wiley X's Reign style is part of its fashion forward Street Series.**

and powered by Eye Point technology which simulates the human eye in every angle, prescription and field of vision.

A new program for Vision-Ease Lens in 2009 will be a new partnership, noted Jay Lusignan, marketing communications manager. "We'll be working with the Skin Cancer Foundation where we'll gain additional visibility to the protection benefits offered by our Coppertone Polarized Lenses. The partnership will provide specific healthy eyes education via the Skin Cancer Foundation Web site and consumer brochures that our customers can take advantage of."

Vision Ease has also launched an

*Continued on page 28*



## > VM ON THE WEB

### READ MORE

See what some prominent Rx sun lens specialists are planning for 2009 to help ECPs grow this segment of their business in SUN SPOTS, a special Web-only feature exclusively on [VisionMonday.com](http://VisionMonday.com).

## EYEING THE NEW OPTIONS IN RX SUN

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educational “Winter Sun Awareness Campaign” that stresses the importance of premium eye protection year-



Yes, the sunglasses are prescription also.



OAKLEY

wear traditionally doesn't seem an essential purchase as the first pair. Drivewear offers an answer to this. Virtually every patient is a driver, and all of

us are spending more and more time behind the windshield of our cars. Drivewear lenses, which combine the best of photochromics and polarization for the driving experience, is an example of

**Left: All of Oakley's new lifestyle images will include messages about Oakley Authentic Rx Lenses. Below: Intercast's NXT brand sun lenses offer an array of Rx options.**



round. The first of its kind, the campaign has both trade and consumer tools available for free via [www.vision-ease.com](http://www.vision-ease.com).

Observed Younger's Rips, “Sun-

a product which creates new markets—the ECP can make an instant connection regarding where sunwear may be vital to their patient.”

Rips reported that a new Drivewear seminar, talking about technology but focusing on the target marketing and how practices can benefit, will debut across the country in 2009. “We will also have many new marketing pieces showing testimonials from wearers, and we will have a new handheld demonstrator to help explain what Drivewear does and how it works.”

Carl Zeiss Sunlens' Gleek said, “Carl Zeiss Vision has been the leader in Rx, sunwear, in particular wrap Rx for the world's leading brands of sunglasses. We were pioneers in developing our patented Spazio lens for Rx wrap frames. Premiering soon will be the most comprehensive Rx sunwear lens collection ever, combin-

ing our wrap and Rx sunwear technology, expanded polarized offerings and new patented mirror coatings and proprietary performance tint technology developed through Carl Zeiss Vision Sunlens.”

With NXT Performance Sunlenses, Intercast S.p.A, a division of PPG, is building a platform for excellence in quality sun lenses, according to Alessandro Borzino, Intercast's Sun Rx business development director. He said, “NXT is used by top sunglass brands and is distributed by a lab network that targets the best optometrists and ECPs. In 2009, NXT will be the subject of a nationwide trade campaign. The material will also be supported by trade and consumer press coverage via partners, retail-

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ers, and labs. By concentrating on growing segments, Intercast plans to hold its position as the leading producer of Rx sunwear. Recently, we have added two new products to the range of NXT Rx sun lenses: NXT SFSV Polar and NXT SFSV Polar Varia semi-processed single vision lenses in the polarizing and photochromic polarizing versions.”

Myles Freeman, president of sales for Wiley X, said, “We believe we’re on the right track since so much of our Rx business relies on supplying ANSI-approved eyewear to the occupational safety market. Our hope is that this category of business will always be there with the thousands of

employers providing safety approved, sport eyewear to their employee membership. We’re dedicated in that all of our frames, [even our Women’s Street Series] are independently certified to exceed high velocity/high mass impact standard ANSI Z87.1-2003. So, now there’s a fashionable, sporty option for customers needing an Rx frame for ‘on the job’ or just because they live an active lifestyle.”

Carl Bracy, vice president, marketing for Essilor, said the company will be launching a “major new Rx sun initiative” in 2009, and added, “Essilor believes there is a perfect opportunity for ECPs to grow their polarized penetration rates by having the Polarized Rx sunwear discussion with every patient. Over the last two years, Essilor has invested millions of dollars into the segment. As such, Essilor’s polarized offering is the broadest in the industry. We have



**Top left: Rudy Project’s Rydon style is one of an extensive collection of Rx-able suns. At right: Kaemon Polarized’s Hard Kore features the company’s SR-91 lens. Left: Bolle’s new B-Tru Rx program includes King.**

SV, PAL, and multi-focal designs in CR, PC, and HI materials. We also offer Wrap Solutions lenses and a variety of colors.”

Linda Pierce, optical manager, Kaemon Polarized, reported, “We see a large opportunity to expand sales of our unique SR-91 Rx sunwear products. In plano or Rx form [SV or Free-style free-form progressive], the consumer will experience the best possible vision in a lightweight and

impact-resistant polarized lens that is guaranteed for life against delamination, cracking or splitting. This unique Rx lens is available in any of our branded Kaemon frames [direct from Kaemon Polarized] or, Kaemon Polarized SR-91 Rx lenses can also be ordered from our select lab network to be edged and mounted into any frame in virtually any base curve.” ■■



## SATISFACTION STARTS WITH THE PERFECT FINISH

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