



KEY RESEARCH FINDINGS

Survey conducted on behalf of PPG Industries from March 1-5, 2007 by Synovate.

Key Findings

REFERENCE SURVEY AS:

Online survey conducted on behalf of PPG Industries from March 1-5, 2007 by Synovate among a nationally representative sample of 1,000 adults, ages 18+.

Data representative of the total U.S. adult population on the basis of region, age, gender and household income.

LENS MATERIAL AWARENESS:

The survey found that the vast majority of adult eyeglass wearers (78%) **think more about their frames than their lenses** when picking out eyewear.

Eighty-four percent of women were more focused on frames than lenses.

The percentage of respondents that were focused more on lenses was the lowest among those 25 to 34, but then increased with age.

Almost 70 percent of respondents **did not know what material their own lenses** are made from.

When asked to **name as many lens materials as possible**, plastic was listed most frequently (by 38% of respondents), followed by glass (34%), followed by polycarbonate (6%).

There were also many non-lens materials that were named, such as metal, titanium, aluminum, sand and various lens options (like Transitions, scratch coating and AR).

Over half (54%) of respondents were unaware that their choice in **spectacle lens material can impact optics**.

Eighty-nine percent of spectacle-lens-wearing participants **assumed that good quality optics were a given** in prescription lenses.

Ninety-four percent of survey participants reported that **if they knew that optics were better in some materials than others**, it would influence their lens choice.

LENS MATERIAL PREFERENCE:

When listing the **most important attributes of an eyeglass lens**, respondents most often mentioned scratch resistance (24%), followed closely by optical clarity (22%), then durability/impact resistance (16%) and light weight (15%).

Thinness ranked seventh on the list (7%).

When asked to pick the response that most closely described their **thoughts on choosing a lens material**, the majority (63%) of respondents agreed that a combination of lens attributes (optics, thinness, light weight, impact resistance, etc.) are important.

Sixteen percent said that they would always choose the lens that offers the best vision, while 15 percent said that the price of the lens was their primary concern.

Seniors (65+) were much more likely than any other age group to choose the lens that offers the best vision.

Concern over price peaked in the 25 to 34 age group, and then decreased with age.

When selecting a lens material, 37 percent of survey participants reported that they were very likely to **defer to the recommendation of an eyecare professional**.

On a scale of one to five (five being very likely), 74 percent of respondents ranked eyecare professional recommendation a three or above.

Those in the 65+ age group were nearly twice as likely to defer to their eyecare professionals' recommendation as those in the 18 to 24 and 35 to 44 age groups.

LENS MATERIAL PREFERENCE FOR CHILDREN:

Forty-five percent of parents ranked durability/impact resistance as one of the **most important attributes of an eyeglass lens for their child**.

This was followed by scratch resistance (24%), optical clarity (17%) and light weight (13%).

When parents were asked to pick the response that most closely described their **thoughts on choosing a lens material for their child**, they selected similar responses as the individuals who were choosing for themselves.

The majority (64%) of respondents felt that a combination of lens attributes (optics, thinness, light weight, impact resistance, etc.) are important.

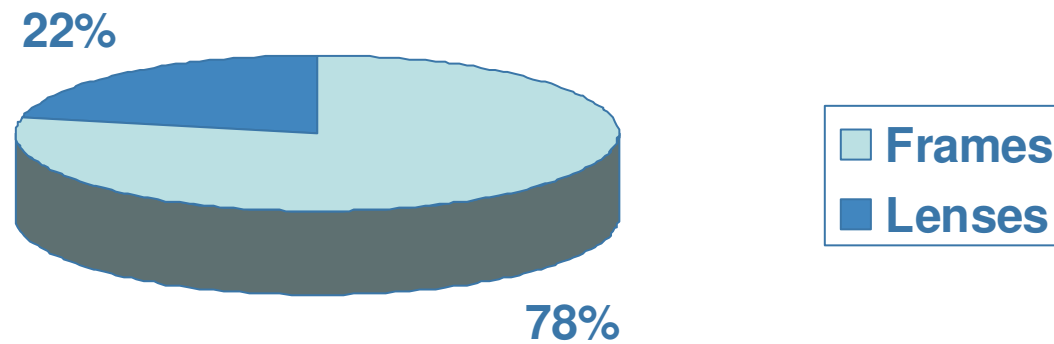
A slightly higher number (19%) said that they would always choose the lens that offers the best vision, while a slightly lower number (11%) said price was their primary concern.

When selecting a lens material, survey participants were as likely to **defer to the recommendation of an eyecare professional** for their children as they were for themselves.

When asked to **name as many lens materials as possible**, 19.5% of parents listed glass, followed by plastic (16%), followed by polycarbonate (6%).

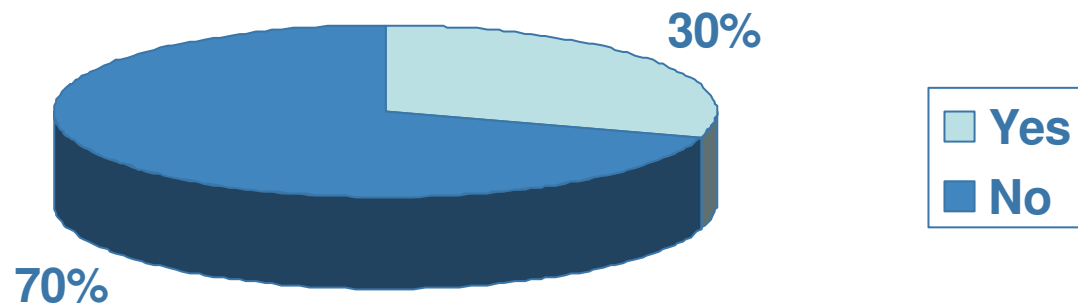
LENS MATERIAL AWARENESS

What do you think about more when picking out eyewear?

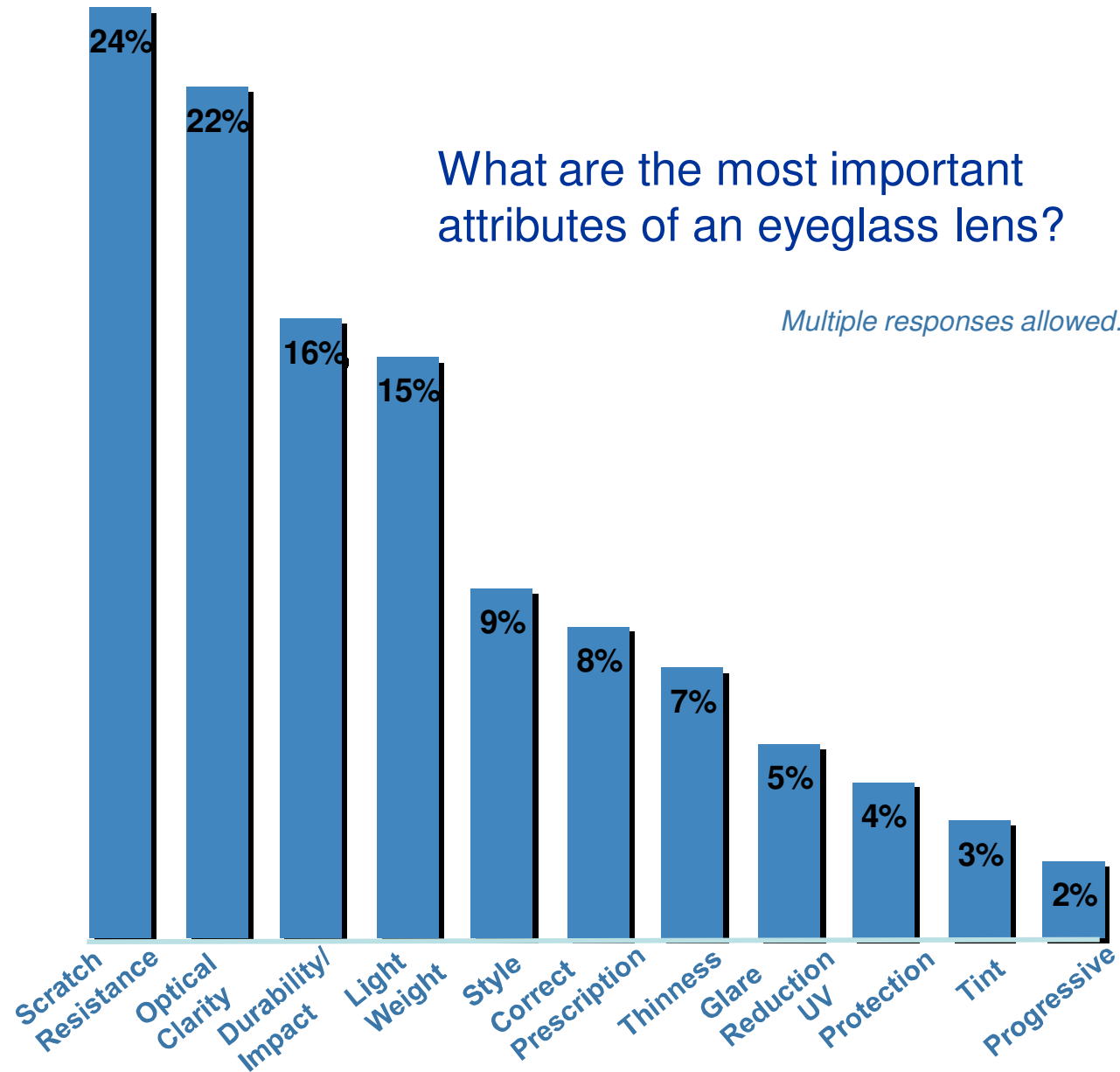


LENS MATERIAL AWARENESS

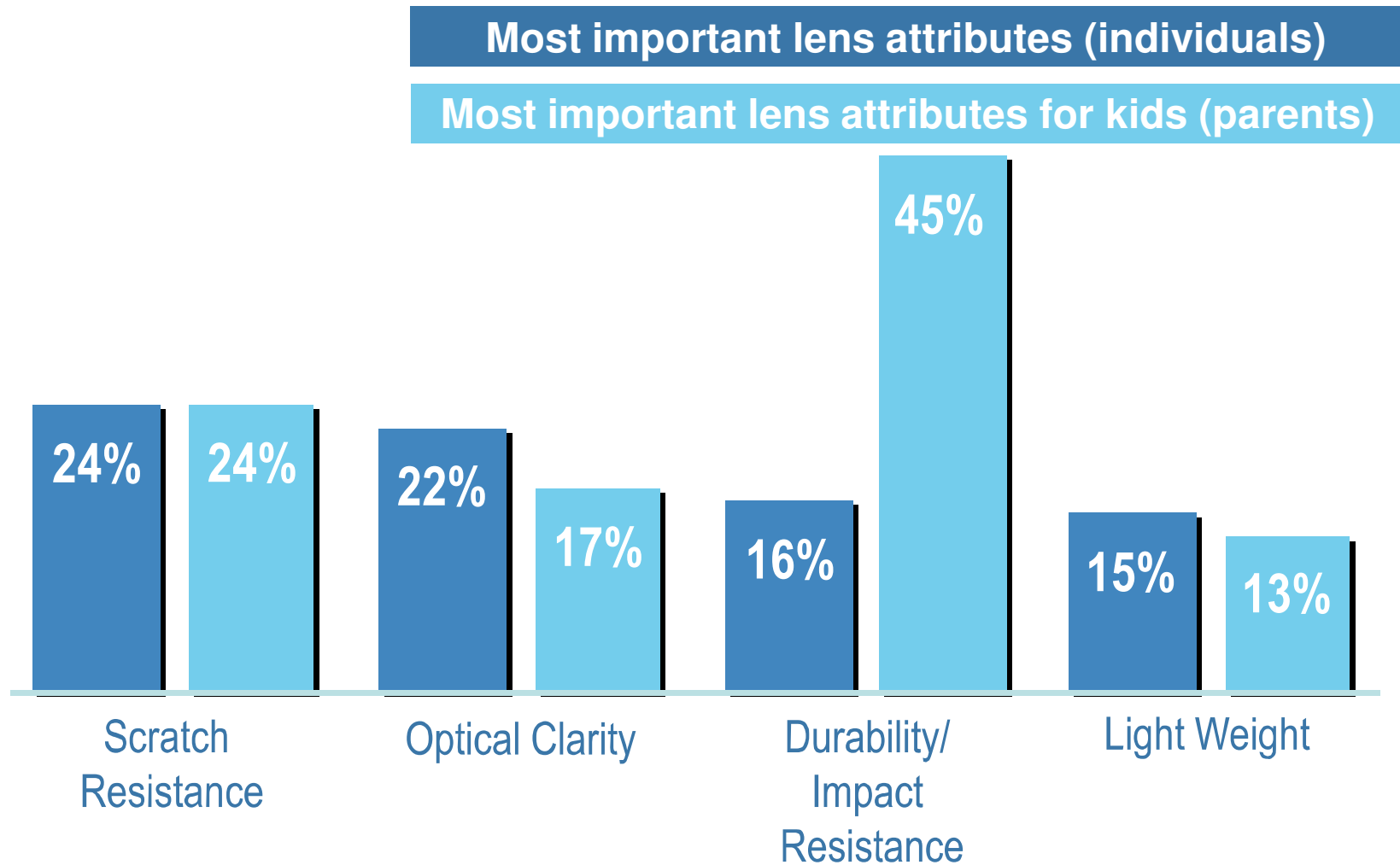
Do you know what material your lenses are made from?



LENS ATTRIBUTES



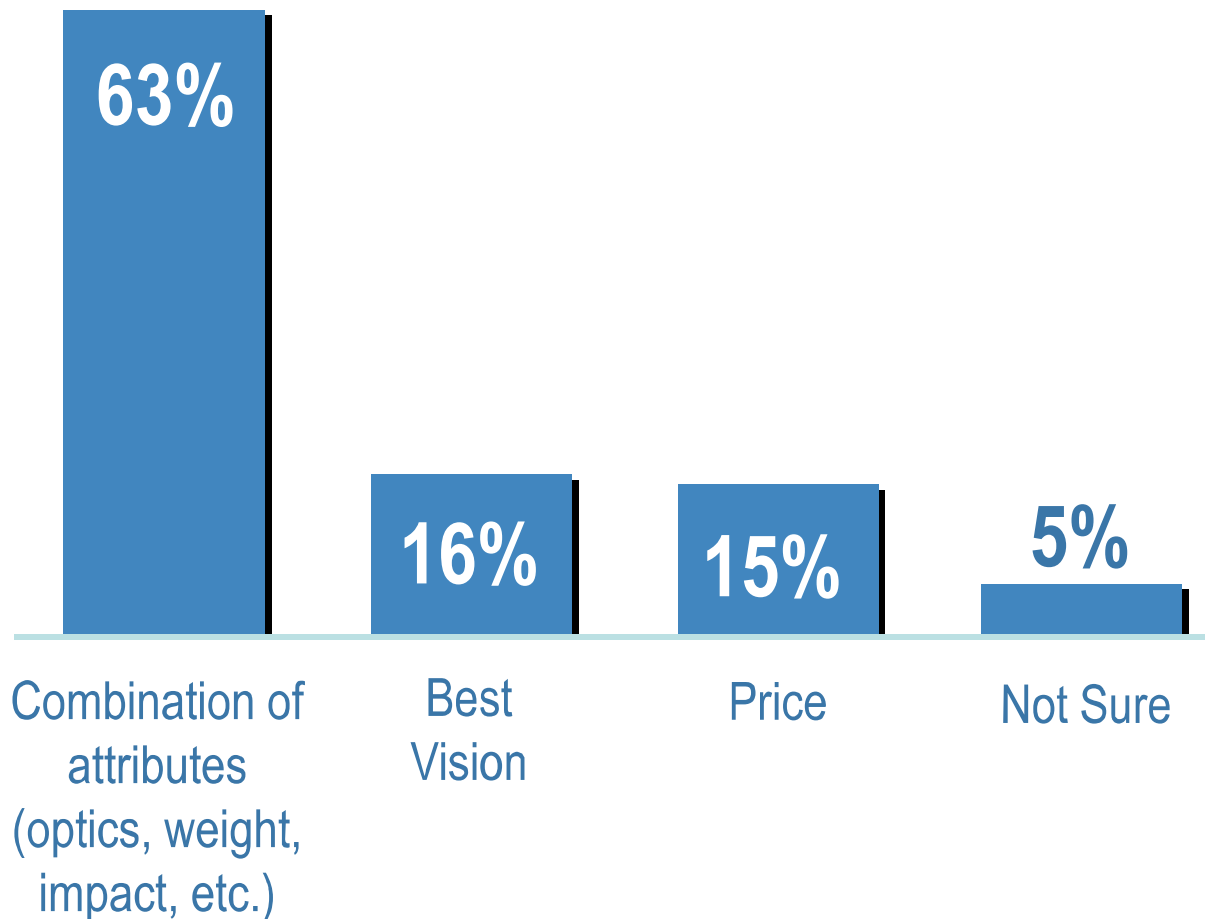
LENS ATTRIBUTES



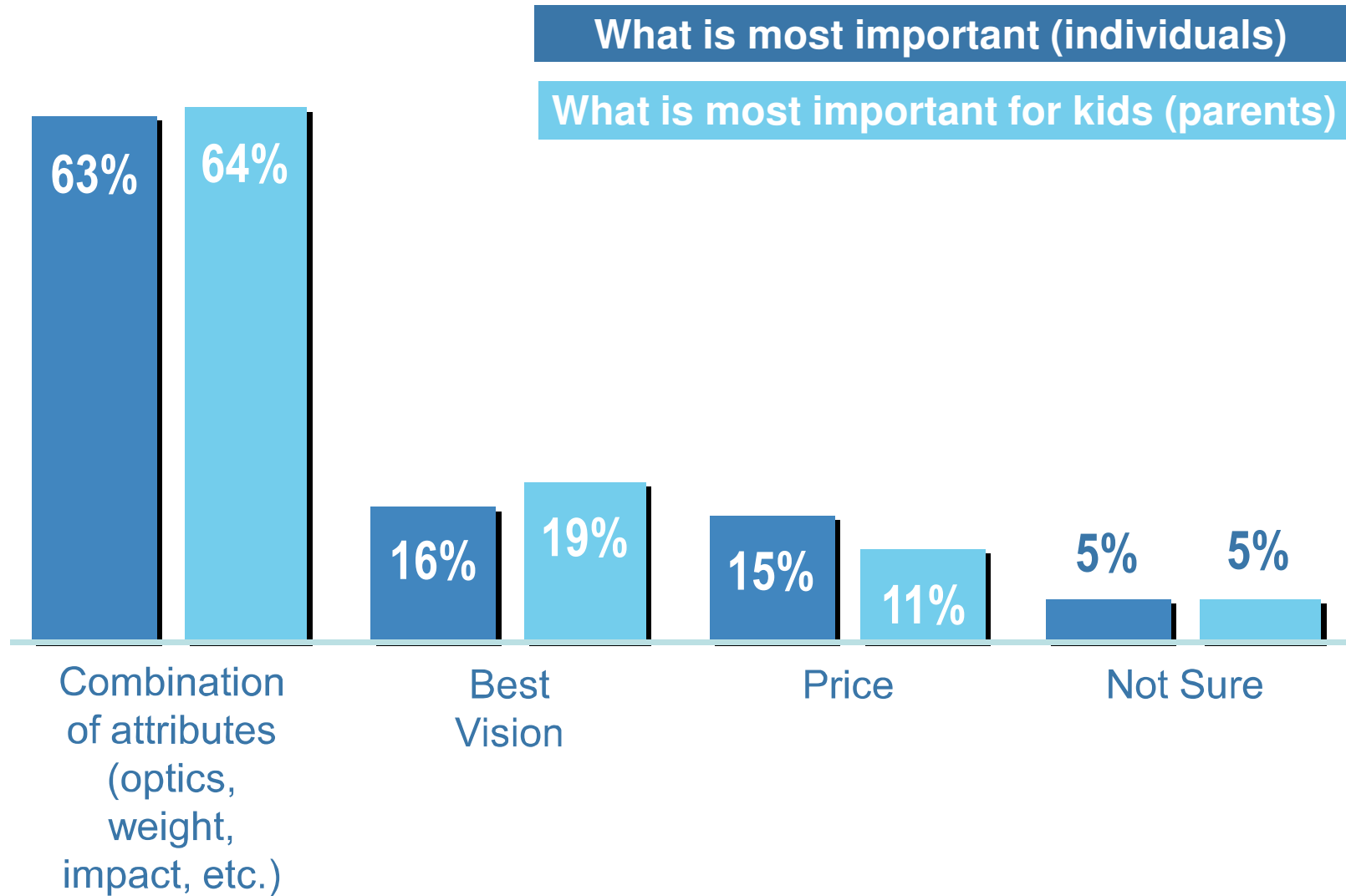
Multiple responses allowed.

WHEN DECIDING ON A LENS MATERIAL...

What is most important to you?

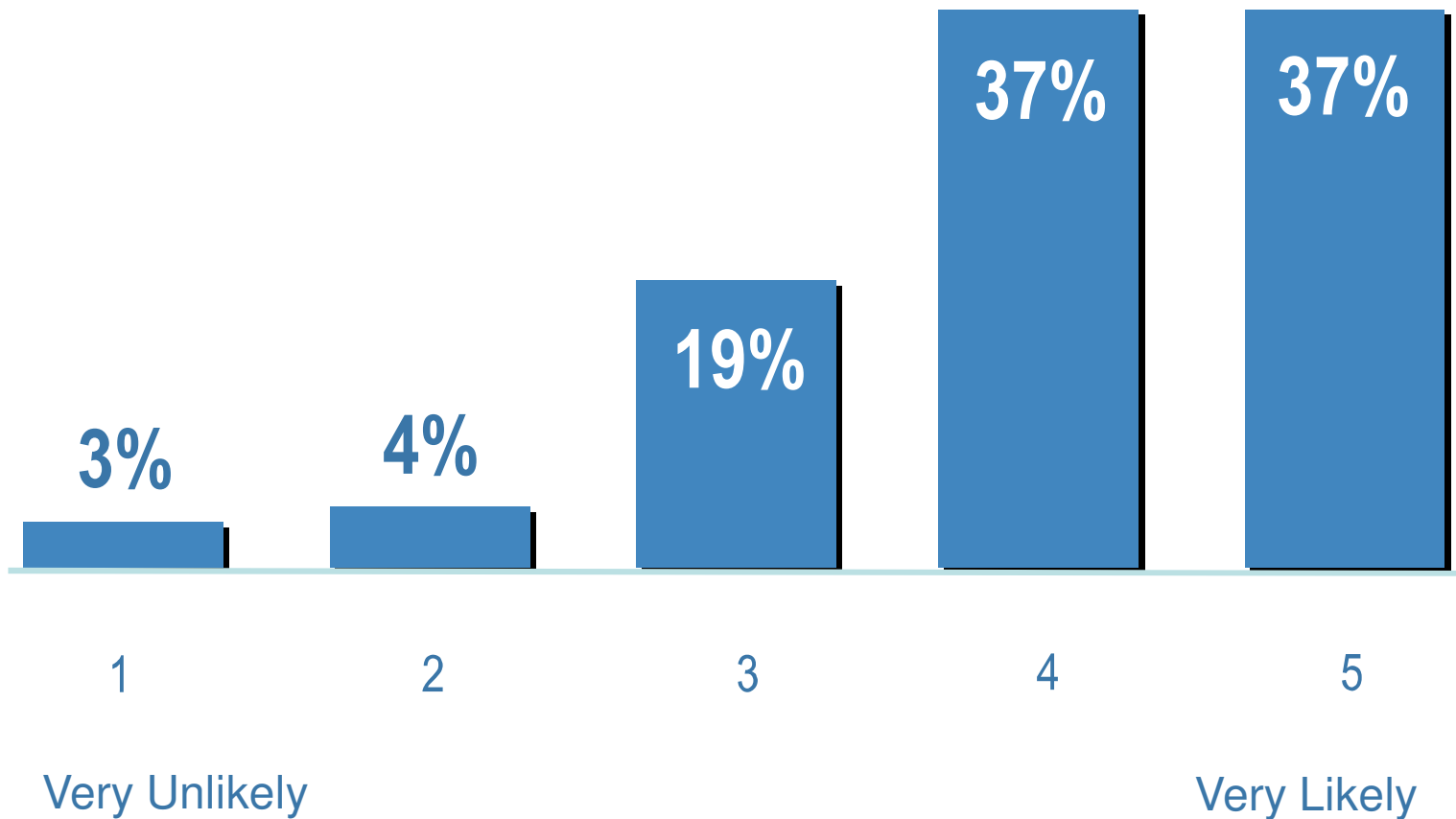


WHEN DECIDING ON A LENS MATERIAL...



WHEN DECIDING ON A LENS MATERIAL...

How likely would you be to defer to the recommendation of your eyecare professional?



IMPORTANCE OF OPTICS

If you knew that optics were better in some materials than others, would that influence your lens decision?

