on the old criteria used in Italian sight tests for driving, 18.6 percent of the applicable sample showed sub-standard characteristics, rising to 32.2 percent with the addition of night vision and 55.77 percent with the inclusion of visual acuity and recognition of variable contrasts.

At the conference in Rome, it came out that many people use the same type of correction – glasses or contact lenses – for driving as they do on a daily basis, but that the glasses or lenses perform very differently depending on whether the wearer needs them to read the name of the caller on a mobile phone, or to enjoy full overall vision when driving at 130 km per hour.

The study found that 71 percent of subjects who had had more than one accident relatively recently had some form of defective vision. The link between accidents and eyesight also stands out from data on the frequency of accidents during the day. The peaks in the morning, between 8 and 9 a.m., and around 5 p.m., obviously correspond to the intensity of traffic on the way to and from work. But accident peaks between 6 and 7 p.m. seem to coincide with the failing light at the end of the day and the sun on the horizon that hits the driver right in the eyes when driving westward. And defective vision is certainly one of the factors in accident rates at night, often resulting in death, peaking at 4 in the morning.

The authors of the study propose to impose a minimum standard of 0.7 visual acuity, or at least 0.2 for weaker eye. They and the members of the Italian Commissione Difesa Vista also suggest some other solutions. One could be the release of specific driver's licenses that would allow certain people to drive only in daylight, for example. Another proposal is to force at least the drivers of public transport and heavy transport vehicles to keep a second pair of glasses specifically designed for driving in their glove compartment, and use it.

This particular requirement is advocated by **Vittorio Tabacchi**, the former president of **Safilo** who chairs the Commissione Difesa Vista and who is set to succeed **Antoni Olivella** as president of **Eurom 1** next week. At the Vision Business Forum, Tabacchi noted that insurance companies are very supportive of his lobbying efforts in favor of more stringent requirements for safe driving.

PRICE IS BECOMING MORE IMPORTANT THAN THE BRAND IN SUNGLASS PURCHASES

The fashion logo has become less important than before in the European sunglass market, according to an ongoing research project whose latest results were released by the **European Sunglass Association** (ESA) at its annual convention in Barcelona a few days ago. The latest data also indicate that average selling prices have been going down and that the mass market, which already represents more than 75 percent of the volume in the major European countries, has been gaining in importance, due in part to the recent economic crisis.

This periodically updated research project is being conducted on behalf of ESA by **Strategy With Vision**, the international consultancy led by **Mark McKenzie**, using existing statistical data and interviews with suppliers and retailers in five major European countries. The presentation made in Barcelona showed a comparison between the data collected in 2006, 2007 and 2009 in individual markets, with additional checks made in May-June 2010, allowing the researchers to extrapolate some trends, triggering some interesting comments and providing input for future research.

SWV's study divides the sunglass market into three different price segments, based on net manufacturers' selling prices: the mass market, at €20 a pair or less, mostly comprising unbranded and private-label products; the mid-priced market, at €20 to €50 a pair, generally covering the more affordable licensed brands; and the premium market, at €50 a pair and up.

The French sunglass market has been less affected by the economic recession than those of Germany, Italy, Spain and the U.K., the study showed, but there has been an increase in the number of first-price offerings at opticians, leading to a decline in average selling prices from €68 to €59 per pair. The total volume of sunglasses sold showed in fact a slight increase in volume between 2008 and 2009, but a slight decrease in value, although what McKenzie calls the "Ray-Ban-isation" of the market has led to relatively stable overall volumes for branded sunglasses.

All in all, the French plano sunglass market was estimated by SWV at about 14.6 million pairs and €157 million in wholesale value in 2009. The total value showed a 9 percent decrease from the 2007 level. The mid-priced segment dominates in France with 8.2 million pairs, compared with 2.5 million pairs in the premium segment. SWV estimates that 57 percent of all the sales go through opticians, while supermarkets and fashion retailers take up 27 and 18 percent of the market, respectively.

Discounters' sales and internet sales have increased in Germany, where the mass market has the highest volume at 13.1 million pairs out of a total of 22.6 million pairs sold in the country. On the other hand, at €78 million, the value of the premium market is just a little higher than that of the mass market, estimated at €76.9 million. The German market has been rather stable over the years in terms of volume and retail price points, in spite of the higher VAT, showing a total value assessed at €226.3 million for 2009.

In Germany, 46 percent of sales go through the supermarkets and fashion retailers. Independent opticians have only 22 percent of the market. Department store sales are declining. Chains and sporting goods stores are selling more sports and sports-inspired eyewear, a segment that is growing and is estimated to represent one-fourth of the market.

In Italy, the recession has led to a reduction in the number of fashion brands preferred by consumers, leaving **Ray-Ban** as the strongest brand, with a firm position at the €120 price point, while **Carrera** has been growing sharply. Fashion is still more important than function in Italy, however, according to SWV.

The total value of the Italian plano sunglass market went down to €180.0 million in 2009 compared with €288.3 million in 2007. Big losses in the premium segment could not offset gains in volume and value in the low and mid-priced segments. The latest surveys indicate a marginal recovery so far in 2010, without attaining the levels of 2007.

Independent opticians have a 43 percent share of the Italian sunglass market, says SWV, but they are losing market share to non-optical channels.

A drop of 27 percent to €149.0 million was assessed for the Spanish sunglass market by SWV between 2006 and 2009. The mid-priced segment has held up relatively well, compared with the two other segments. Like in Italy, however, there was a major decline in the premium segment over the period – from 4.4 million to 2.9 million pieces in a total market of 20.1 million pairs.

In Spain, independent opticians have an almost equal share of the market in terms of value as the supermarkets and the fashion retailers: 34 and 33 percent, respectively. Opticians have been able to establish themselves in the €70-110 price bracket in terms of retail price points, but with heavy discounting of branded products. Specialized retailers have been gaining market shares.

The U.K. market went down in value to €121.9 million in 2009 from €174.1 million in 2006, although the volume grew slightly to 17.8 million pieces from 17.3 million. The mass market remained stable in volume, but its value decreased to €43.4 million from €50.4 million. The premium market also grew in volume, but its value fell to €58 million from €88 million.

Independent opticians have only 7 percent of the British sunglass market, which is dominated by the supermarkets and fashion retailers with a share of 40 percent. Low-cost fashion chains such as **H&M**, **New Look**, **Matalan** and **Primark** have a strong position. They are being challenged by the internet, which has a larger presence in this market than in other European countries.

Details of the study, which are available to ESA members, also show that functionality is a growth area in the European market and that sports retailers and opticians could be the specialty channel of the future.

WHERE AND WHY DO ITALIANS BUY SUNGLASSES?

The repression of the widespread pattern of counterfeiting still going on in the broad fashion market, sunglasses included, has led Italian authorities to discover a curious abbreviation adopted for products distributed in Italian market stalls. To reassure the consumer, the sunglasses are stamped with the letters «CE,» the same as those used to certify conformity with European Union standards, but possibly with a different typeface. In fact, almost all the sunglasses sold at market stalls or by street peddlers in Italy bear a CE stamp, but investigations have revealed that the initials actually mean "China Export," no doubt to guard against incrimination for fraudulent merchandise.

This information was given by **Gianni Mariutti**, leader of the Istituto Superiore di Sanità, an Italian state institute for health, during the presentation of another statistical study promoted by the Italian **Commissione Difesa Vista** (Vision Defense Committee) to raise awareness about the dangers for the wearer's eyesight from excessive exposure to UV radiation. The survey, carried out in December 2009, showed among other things that Italian consumers have become more concerned about purchasing their sunglasses in the different retail channels as compared to two years before, when a similar study was conducted on the subject.

While purchases made from market stalls remained more or less flat, at around 5 percent of the sample, compared with 4 percent in 2007, 5 percent of consumers who previously purchased sunglasses from an optician now buy them from a sports retailer. Opticians still account for half of purchases, sports stores have gained 5 points, up from 4 to 9 percent, and purchases in supermarkets are up from 3 to 5 percent. Sunglass purchases have grown overall, according to this study, as the percentage of people who have not to have purchased them at all in the past two years has dropped from 33 to 31 percent.

When it comes to buying sunglasses for their children, only 5 percent of the respondents confessed in the latest survey to having bought them from a market stall, or that they would be inclined to doing so. Others said they either didn't have children or are that they were not sure they would make such a purchase, but almost all the remainder of the sample said they wouldn't purchase counterfeit products. The percentage of people who would never buy glasses for their children from a street market went up from 73 to 75 percent. No figures were given for the evolution of the children's sunglass market in Italy, but it's still relatively rare to see children wearing sunglasses on Italian beaches, while in Australia it's the complete opposite – it has become the norm for children to wear them.

Among the criteria followed when purchasing sunglasses, the quality of the lens came out as the clear leader in the latest survey, singled out by 73 percent of the population. Only 11 percent of the sample rated price as being more important. Even fewer people put style as most important factor, and only 2 percent put forward the brand as the most important criterion.

GERMAN LENS GIANTS FINED FOR PRICE-FIXING

At the end of a lengthy investigation, reportedly triggered by an individual's inquiry about different price quotations from different suppliers, five ophthalmic lens makers in Germany have been socked with €115 million in fines for participating in a price-fixing scheme. **Rodenstock**, **Carl Zeiss Vision**, **Essilor**, **Rupp + Hubrach Optik** and **Hoya Lens Deutschland** were named by Germany's federal antitrust agency, the Federal Cartel Office, which also cited seven individual employees and the **Central Opticians' Association** (ZVA).

The Bundeskartellamt said the companies worked together to simultaneously raise the prices charged to opticians, with the increased cost passed along to consumers. It said that the price-fixing scheme "virtually paralyzed competition" in the market. The cooperation started in mid-2000, the agency's investigations found. Among other actions, each company was informing the other members of the group when it was going to raise prices. Bonuses and discounts for opticians were agreed upon among them.

Rodenstock refuted the allegations, arguing that consumers and opticians didn't suffer any losses from the companies' activities, and adding that it was instituting a system to prevent