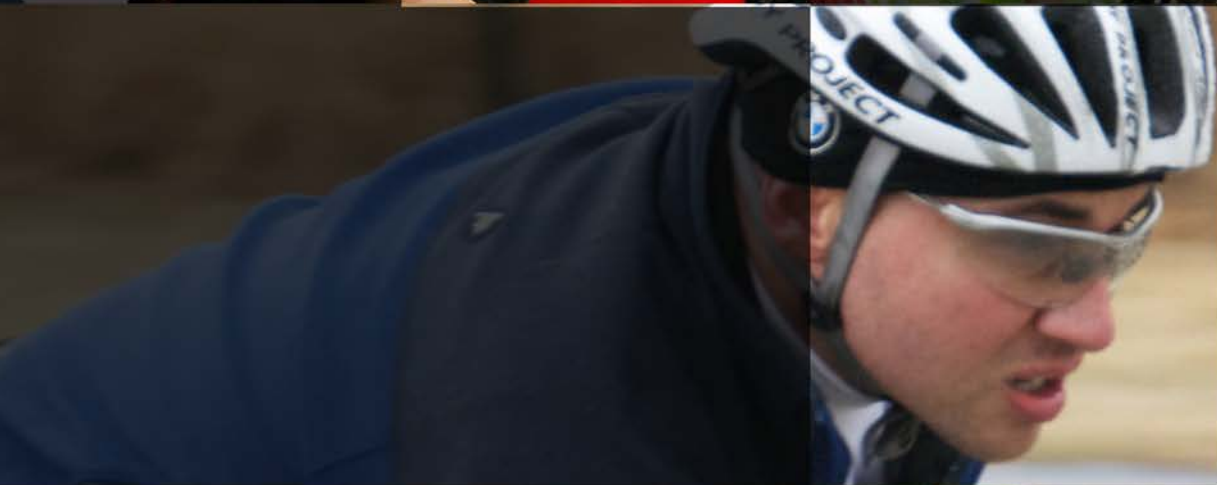




**ONE
MAN**



**DIVERSE
NEEDS**



WHY WE'RE HERE

Lifestyle-Metal

Recreational Sport

Inside Oakley, we've had our methods for categorizing men's eyewear. By materials. By features. By competitive set.

Xtro

Competitive Sport

Active Lifestyle

But how do our internal categories match up to how men think of sunglasses in the real world? How does the average guy classify and group sunglasses? What are the different types of sunglass buyers, and how are their needs and attitudes different? The way we characterize consumer types to match our internal product segments—how authentic are they? Are there more valid ways to segment the world of sunglasses that will resonate more powerfully with consumers?



These are the questions we set out to answer when we spearheaded this research study.



We want to map out the needs and attitudes that drive men to buy sunglasses.

We want to define product segments that are meaningful and relevant to customers and prospects.

We want to be ahead of the competition when it comes to getting what men want in sunglasses.



ROAD MAP

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HERE'S WHAT WE DID

In February 2011, we met 36 men from San Diego, Chicago and Miami for face-to-face discussions in a focus group facility in their city. To qualify, these men must have bought sunglasses in the last twelve months, either a pair of Oakleys or a competitive brand.

These conversations helped us identify common themes and patterns that inform the bulk of the learnings we share in this book.



★ San Diego



Chicago ★



Miami ★

In March 2011, we went back to 4 of the men we talked to, going to their neighborhoods and homes to witness their everyday lives. We chose these men because their passions and attitudes were particularly representative of our key learnings. Documenting their lives and their neighborhoods allowed us to bring the research to life in powerful photographic and video detail.

Some stats about the men we talked to:

Average Age

30.5

Teenagers

2

Twentysomethings

16

Thirtysomethings

11

Fortysomethings

7

Range of sunglass brands they own:

Oakley, Armani, Bolle, Calvin Klein, Carrera, Chocolate, Costa del Mar, Dolce & Gabbana, Fossil, Gucci, Maui Jim, Nike, Ray-Bans, Revo, Rudy Project, Serengeti, Smiths, Spy, Vuarnet

HERE'S WHAT WE LEARNED IN A NUTSHELL

Here's an executive summary of the top three things you should take away from this research.

I.

Don't segment sunglasses by who the buyer is but by his needs and mindset.

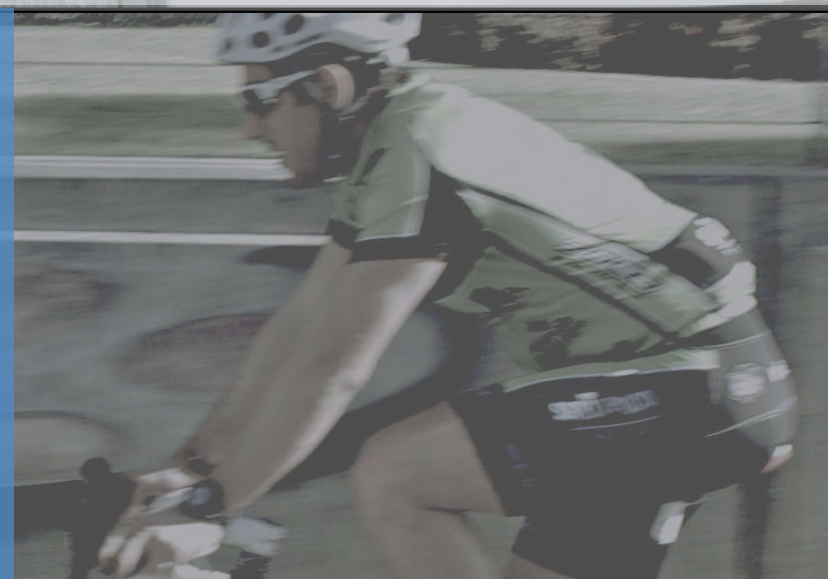
If you want to understand what drives men to buy different types of sunglasses, don't get trapped trying to figure out what type of person he is. There's no such thing as a singular sunglass profile that a man will neatly fall into. Instead, try to understand what he's buying sunglasses for. Any one guy can have several very different types of sunglasses, from Pradas to Oakleys, to meet his diverse needs and mindsets.



II.

Men categorize sunglasses by three basic needs:

- **Sports**
- **Casual Everyday**
- **Dressy Occasions**



Men are simple! While there are nuances and differences within each category, from the consumer's point of view, these are the three broad sunglass categories that consistently emerge and rise to the top.

III.

For the two needs that are most relevant to Oakley, we identified four distinct mindsets that a man could assume when deciding what kind of sunglasses he wants.



Sports

The Precision Athlete mindset needs to see far and act fast for a precision-driven sport

The Raging Bull mindset demands something sturdy for a high-energy workout

Casual Everyday

The Mobile Man mindset wants something flexible for life on the go

The Dude mindset seeks a casually stylish look

ONE MAN, DIVERSE NEEDS

We waste time when we second-guess who our buyer is as the clue to what kind of sunglasses he will like. Whether he is fat or buff, young or old, dressed-up or in flip-flops, the clue to what sunglasses he wants to buy on any day is in understanding what he needs it for, and what mindset he's in.

As a couple of gentlemen we met pointed out, sunglasses (and sometimes watches!) to many men are much like shoes to many women. Over time, a man may accumulate a diverse collection of sunglasses to match the many sides of his life and personality.

In the real world

Respondant: Michael
Location: San Diego
Shades: Carrera; Oakley

Michael wears his “Real Deal” Carreras when he wants to “make a good first impression” and feel like “an Italian big shot.” He relies on his “Sportscenter” Oakleys when playing tennis or beach volleyball because they make him feel like a “pro” who “means business.” He also has a pair of no-brand “stunner shades,” a pair of Fossils, and a pair of three-Euro, knock-off Carreras.

In the real world

Respondant: Angel
Location: Miami
Shades: Costa del Mar; Maui Jim; Oakley; Prada; Ray-Bans; Generics

Then there is avid sunglass collector Angel. He has two pairs of Oakleys for active days. For “dressy/business” situations, he likes his metal Oakleys or his Pradas. The two pairs of Costa del Mars are for fishing, the Maui Jims are good for “casual elegance,” while his three pairs of Ray-Bans are for days when he wants that “old-school, mature” look. Angel has another ten or more no-name brands of sunglasses for a variety of other specific situations and mindsets.



IT BOILS DOWN TO THREE BASIC NEEDS

Men will tell you that the main reason they wear sunglasses is for protection from the sun.

But why more than one pair?

The specific reasons are many and varied, but they tend to fall into one of three broad categories.

While there are definitely nuanced differences in each category, when we asked men how they would naturally sort things, it always boils down to these three simple groups.

SPORTS



“SEE WELL IN DIFFERENT CONDITIONS”
 “BETTER PROTECTION”
 “SPORT UTILITY”
 “ACTIVE”
 “FUNCTIONAL”
 “ATHLETIC”
 “WORKING OUT”
 “SPORTY”
 “WORK UP A SWEAT”
 “ACTIVITY SPECIFIC”
 “SPORTING PURPOSE”

CASUAL EVERYDAY



“OUT IN THE SUN”
 “VERSATILE”
 “MULTI PURPOSE”
 “GOING OUT WITH FRIENDS”
 “HANG OUT”
 “GO-TO PAIR”
 “ALL PURPOSE”
 “DRIVING”
 “SOCIALIZE”
 “CLASSIC”
 “GO TO THE BEACH”

DRESSY



“MAKE A STATEMENT”
 “CLASSY”
 “TRENDY”
 “WITH CLIENTS OR COLLEAGUES”
 “FASHIONABLE”
 “WEAR WITH A SUIT”
 “WITH MY WIFE”
 “SOPHISTICATED”
 “PROFESSIONAL LOOK”
 “LOOK GOOD WITH MY GIRLFRIEND”
 “IMPRESS CHICKS”

DISCERNING A MAN'S MINDSET

However, when we listened carefully to how men talked about their attitudes and preferences within each category, we noticed subtle but unmistakable differences in mindsets.

Of course, the lines between these mindsets are not hard and fast. But they help us understand the spectrum of mindsets a man may adopt when thinking of and buying sunglasses.

	SPORTY			CASUAL EVERYDAY		DRESSY	
Category	<i>The Precision Athlete</i>	<i>The Raging Bull</i>	<i>The Mobile Man</i>	<i>Mr Carefree</i>	<i>The Dude</i>	<i>The Professional</i>	<i>The Show Off</i>
Mindset	I gotta see clearly, act fast, be precise	I'm going to overcome all hurdles	I want to get around without hassle	I don't want to worry about breaking or losing it	I want to look cool but relaxed	I want to feel confident and sharp	I want to make a statement
Sunglass role	Vision enhancer and shield	Armor and weapon	Handy protection	Disposable protection	Smart-looking protection	Sensible protection	Fashion accessory
Desired features	Optical clarity, interchangeable lenses, custom-designed for sport, advanced technology	Indestructible, never fall off, not fog up, light & comfortable	Multi-function, comfort, somewhat cool	Cheap, cheap, cheap!	Unique/personal look, flexible style	Quality brand, sleek design, sophisticated look	Luxury brand, trendy, stand-out look
Social circle	Doesn't matter—it's about the sport	Doesn't matter—it's about the sport	The guys, anyone really	With the guys, the kids	Friends & family	Colleagues & clients	The chicks!
Activities	Road-cycling, fishing, shooting, flying, golfing, motor sports, speedskating, hunting	Trail running, mountain biking, whatever results in serious sweating	Out in the sun, on-the-go, driving, casual/social sports	Doing something rough & tumble	Hanging with friends, going out, cruising	Going to meetings, business lunch, country club	Parties, weddings, the Oscars!

Given that four of these mindsets (The Precision Athlete, the Raging Bull, the Mobile Man, the Dude) are particularly relevant to Oakley, we dove into the lives of four men to illustrate how these mindsets manifest in the real world.

A note about polarized lenses:

While it's a must-have feature to The Precision Athlete, many men also care about it even when not in a Precision Athlete activity or mindset. Like UV protection, men who seriously worry about eye protection will seek out polarized lenses.

PRECISION ATHLETE



MY SUNGLASSES ARE MY
VISION
ENHANCER, MY SHIELD.



WHAT OTHERS THINK
When people see you in these sunglasses, what do you imagine them saying about you?

He owns a great pair of glasses =

I GOTTA
SEE CLEARLY,
ACT FAST AND BE RAZOR-SHARP IN
PRECISION.



Features I want?

I need **optical clarity**, interchangeable lenses to **match weather and light** conditions, advanced technology, and a design that is perfectly tailored for my activity. Looks don't matter—it's all about function and performance.

This is my mindset when I'm **fishing, road-cycling** (for speed), **speed-skating, racing cars, golfing, flying planes, hunting, target-shooting**—any kind of precision sport where I need to see far, think sharp, and act with skill and accuracy.

The Red Baron!

HOW YOU FEEL WHEN YOU WEAR IT
Name a celebrity or draw a fictional character that exaggerates how you feel when you wear these sunglasses!

Concise, Dark, Fast

HOW YOU FEEL WHEN YOU WEAR IT
Name a celebrity or draw a fictional character that exaggerates how you feel when you wear these sunglasses!

CLASSIC MOMENT
In your mind's eye, what is the perfect occasion for wearing these sunglasses? Write a caption to describe it.

Getting into a
fast car and
doing some
driving or racing

BULLET TRAIN SPEEDY

Nicknames: “Bullet Train” & “Speedy”

Stefan is a Precision Athlete when he speedskates, and when he cross-trains in his inline skates and on his bike.

Location

Stefan lives in Bridgeview, Illinois, about 13 miles from downtown Chicago.

Occupation

He works for American Express, selling financial services.

“I sell an experience. 99% of the time you don’t need that experience, but then again life is all about being in the moment. Because once that moment is gone, you can never get it back.”

Inspiration

“Lance Armstrong because of how he got knocked down and ALWAYS gets back up.”

Goal in life

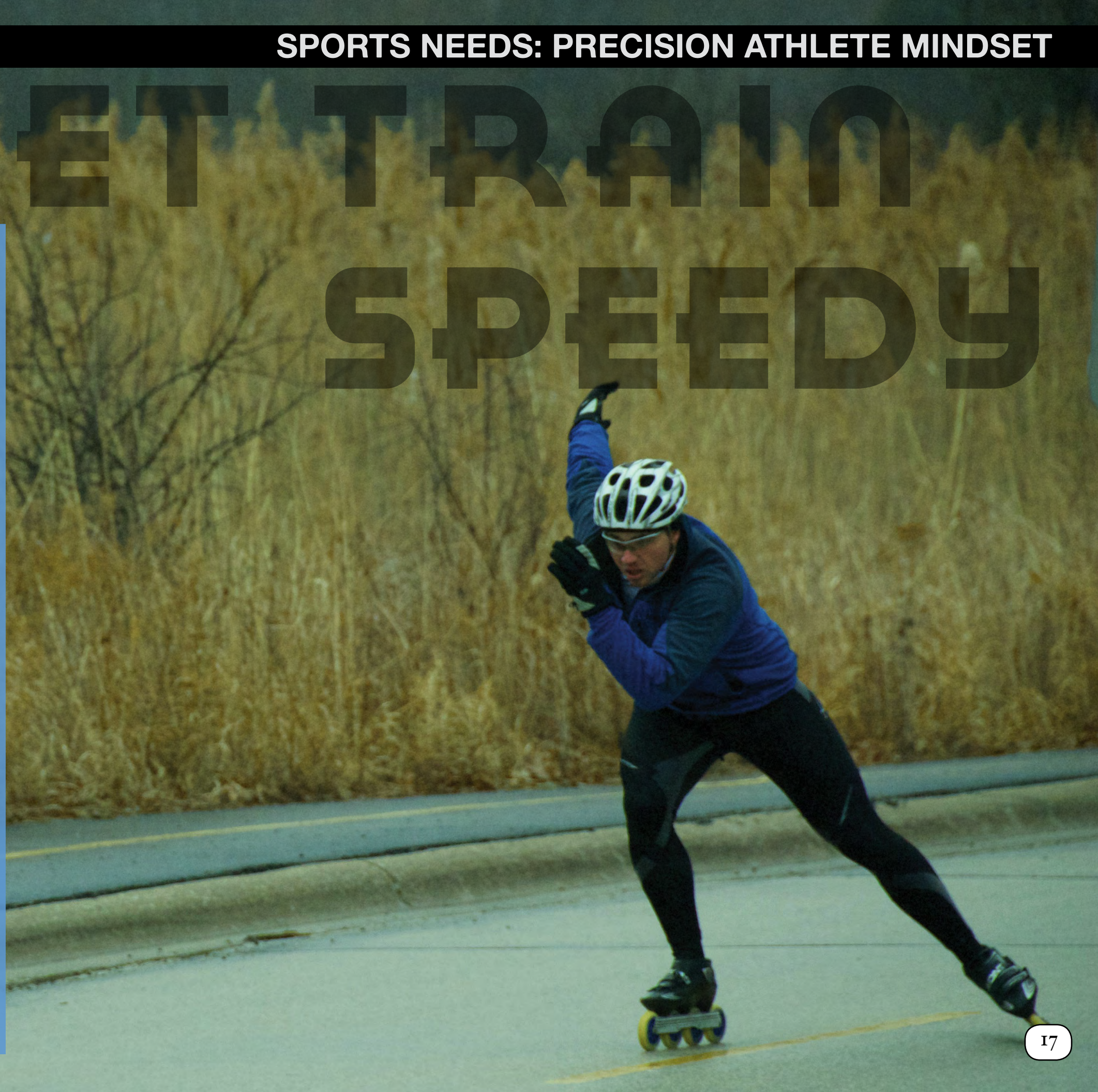
“Qualify for the Olympics time trials in speedskating.”

Songs on his playlist:

“All These Things That I’ve Done”—The Killers

“Keep Hope Alive”—The Crystal Method

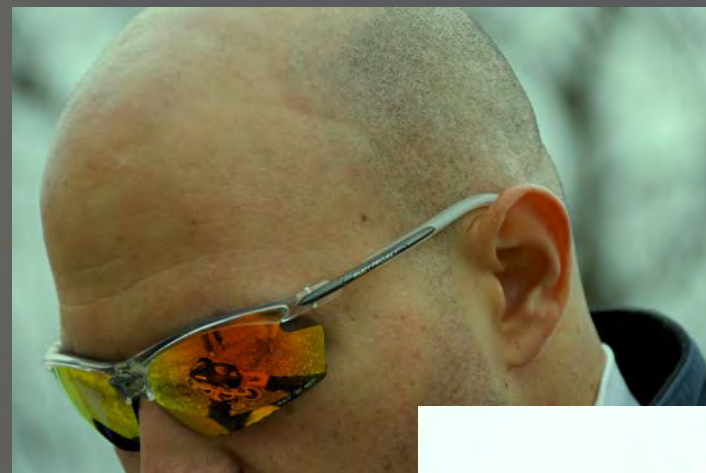
Prominent brands in his life





His sporty shades

In his *Precision Athlete mindset*, he loves his Rudy Projects. He loves the interchangeable lenses, and that the company is really focused on cyclists—he cannot stop mentioning that he met Rudy himself at a cycling convention. He also likes the way the sunglasses fit around his head, and how he can adjust the wrap around his ears.



Stefan's casual everyday side

When he goes downtown to hang out with friends or go on a date, he switches to a *Dude mindset*. For this outing, he has a Guess leather jacket over an embroidered shirt, is wearing his signature Chrome by Azzaro cologne, and is considering whether to wear his brand new Spy sunglasses.



JAWBONE



FLAK JACKET



FAST JACKET



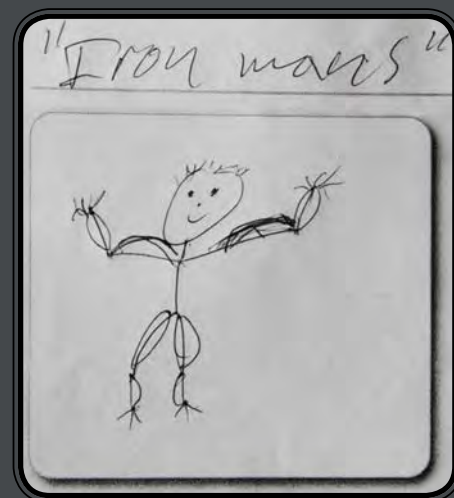
RADAR



Raging Bull



My sunglasses are my **armor** my weapon against the elements.



I'm going to **jump** over all hurdles and **blaze through** any obstacles. Nothing can stop my advance.



Features I want?

I need something sturdy and **indestructible** that won't break on me in the **battlefield** of my sport. It's gotta fit snugly and comfortably, and never fall off or steam up no matter how much I sweat or how **fiercely** I move. Looks? Who cares—I just need it to perform and stand up to the challenge.

This is my mindset when I'm trail-running, mountain-climbing, competing in streetball, mountain-biking—any kind of high-energy sport where I'm going to **break a sweat** and **move** around fearlessly.

This guy means business, I'm intimidated.

That guy looks really athletic, I bet he's a soccer superstar.

WHAT OTHERS THINK
When people see you in these sunglasses, what do you imagine them saying about you?

SUGGE SUGGAR

Nicknames: “Sugar” & “Suge”

A former Marine, Robert is a Raging Bull when he runs on, or more accurately, when he runs off the trail.

Location

He lives in Del Mar, just north of San Diego near Torrey Pines State Park.

Occupation

He works long hours building his career in finance as a venture capitalist.
“I provide working capital for business owners.”

Inspiration

“My mother because of her strength, dedication and will power to overcome anything that life throws at her.”
(She was widowed when Robert was still a kid.)

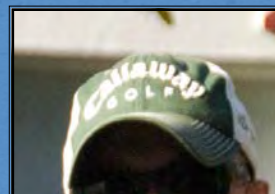
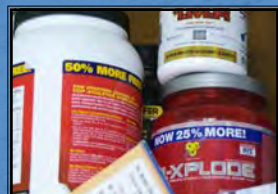
Goal in life

“Working on my master plan to make my millions.”

Songs on his playlist

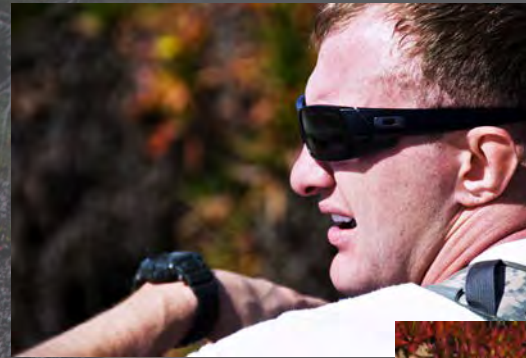
“Bulls on Parade”—Rage Against the Machine
“Drop the World”—Lil Wayne & Eminem
“Satellite”—Dave Matthews Band

Prominent brands in his life



His sporty shades

In his *Raging Bull mindset*, Robert relies on his Oakley GASCANS. He's amazed at how much abuse his Oakleys have lived through, and likes that Oakleys are preferred by service men. His Oakleys have gone with him on runs that even his super-athletic dog won't!



Robert's other mindsets

Robert is also a fishing fanatic. His Oakley GASCANS serve double-duty as his *Precision Athlete* sunglasses of choice—he simply swaps in some Black Iridium Polarized replacement lenses. Robert also has a pair of Pradas for times when he needs to be the *Professional* in a formal suit.



Robert *The Professional* in his Pradas



Robert *The Precision Athlete* goes fishing with his polarized Oakleys

SCALPEL



FLAK JACKET

PIT BULL



RADAR

FUEL CELL



MOBILE MAN



I WANT TO
GET AROUND
AND ABOUT
WITHOUT HASSLE.

I LOVE THESE SUNGLASSES BECAUSE I can use them every day

Ole Reliable

MY SUNGLASSES NEED TO BE
HANDY AND VERSATILE,
SO THEY CAN
GO EVERYWHERE
WITH ME THROUGHOUT MY DAY.



Features I want?


I need something **multi-functional**, good for **driving**, getting to work or school, having a **beer with my buddies** in the backyard, or **running to the store**. And it's gotta be comfortable and look somewhat cool, since I'll be wearing it all the time!

This is my mindset when I'm **on-the-go** and outdoors, going about my day, getting things done, doing stuff with the guys, maybe some **light sports** like shooting hoops or a jog by the beach—basically **anytime I'm out in the sun**.

CLASSIC MOMENT
In your mind's eye, what is the perfect occasion for wearing these sunglasses?
Write a caption to describe it.

GOING TO THE BEACH,
OR AN OUTDOOR BASEBALL
GAME

CLASSIC MOMENT
In your mind's eye, what is the perfect occasion for wearing these sunglasses?
Write a caption to describe it.



driving my boat
on lake Michigan
Warm sunny day
blue sky's

HOW YOU FEEL WHEN YOU WEAR IT
Name a celebrity or draw a fictional character that exaggerates how you feel when you wear these sunglasses!

CLASSIC MOMENT
In your mind's eye, what is the perfect occasion for wearing these sunglasses?
Write a caption to describe it.

driving my boat
on lake Michigan
Warm sunny day
blue sky's

SPENCER SPENMAN

Nicknames: "Spence" & "Spenman"

Spencer is a Mobile Man as a college student going around campus, as a commuter in the metro and on longboard, and as a local park ranger.

Location

Spencer lives in South Miami, Florida.

Occupation

He goes to school at Miami Dade College full-time. He also works part time at a local park service, and "DJs for money on the side."

Inspiration

"Kelly Slater and Bruce Irons, because of their success and innovation at what they do."

Goal in life

"[I'm a] young college student finding his way and living life to its fullest."

Songs on his playlist:

"Innocence"—Nero

"The Plot to Bomb the Panhandle"—A Day to Remember

"Memories"—David Guetta, featuring Kid Cudi

Prominent brands in his life



His everyday shades

In his *Mobile Man mindset*, his Nikes are his go-to pair of sunglasses because they're versatile and comfortable, and great when he's getting around in the sun, whether on campus or at the park. He switches to his cheaper Chocolates when he worries he may take a spill on his longboard, as he doesn't want to damage his treasured Nikes!



A carefree side to Spencer

Spencer morphs between his Mobile Man and *Mr Carefree mindset* throughout the day. On days where he's on his longboard a lot, he takes on his Carefree mindset, so he can be free on his board without worries or inhibitions.

Spencer also illustrates the attitude that separates the Casual Everyday from the Sporty mindsets. Even when Spencer gets serious about his longboarding, he sees his sunglasses merely as general sun protection—they are not a critical armor or enhancer for his sport.



FUEL CELL



HOLBROOK

TEN



BATWOLF

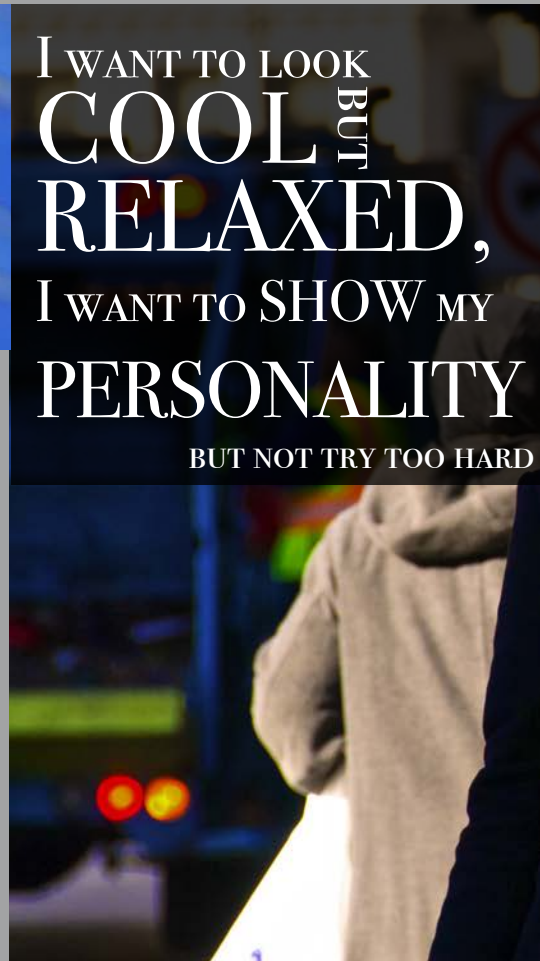
C-WIRE



THE DUDE



I WANT MY SUNGLASSES TO
LOOK SMART
AND MATCH WHO I AM.



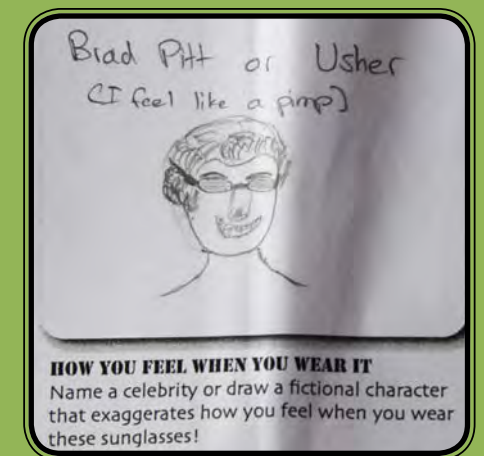
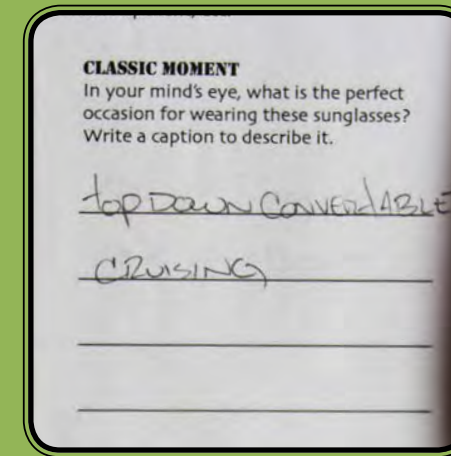
I WANT TO LOOK
COOL BUT
RELAXED,
I WANT TO SHOW MY
PERSONALITY
BUT NOT TRY TOO HARD



Features I want?

I'd like something **unique**, that goes with my **personal look**. But nothing fussy or superficial—the style's got to be **casual, real and flexible**, so it can go with what I wear on a daily basis.

This is my mindset when I'm **hanging** with my friends, **going out**, taking a smoke outside, **cruising** in my car—basically **enjoying life**, doing the things I love, with my circle of friends.



WILL

Will is The Dude whose bachelor pad is home base for his circle of friends. They like to lunch and smoke at the neighborhood Cuban cafe, go to live music shows by local bands, and just hang out.

Location

He lives in West Miami, Florida.

Occupation

Will is a security analyst who “keeps the bad guys out of your computer.” He’s going to school at night to get his degree, plays the guitar, and is a talented illustrator.

Inspiration

“Salvador Dali because he is very good at visually expressing the paradox of modern life.”

Goal in life

“Happily thriving on the fringe.”

Songs on his playlist:

“Sprawl II (Mountains Beyond Mountains)”—Arcade Fire

“The Enemy Guns”—Devotchka

“The Last Beat of My Heart”—Siouxsie & The Banshees

Prominent brands in his life





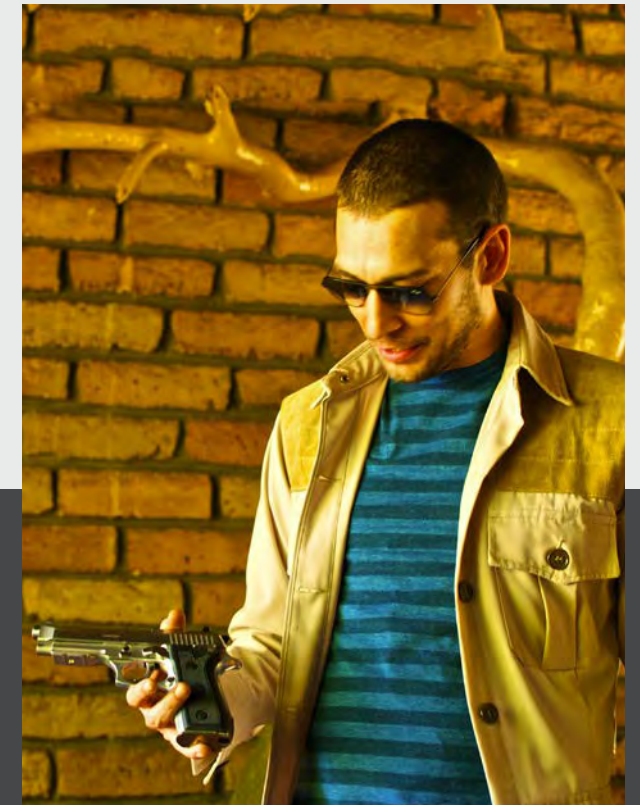
His everyday shades

For his *Dude mindset*, Will loves his two pairs of Ray-Bans. He likes the strong, classic look of Ray-Bans. He likes the Aviator's lighter-colored lens for indoors or at night, while the darker shades are great for going out to cafes and restaurants.



The Precision Athlete in Will

Besides his passion for fringe arts and technology, Will also has a *Precision Athlete mindset*—he is a target shooter who competes in local competitions and collects guns. Even though he likes his Aviators for his indoors Dude lifestyle, another big reason he chose them is that he can see well in them when shooting at the range.



PLAINTIFF



DISPATCH



CROSSHAIR 2.0



FROGSKINS



Men don't go shopping or browsing. Or at least, that's what they'll say! Here's what we learned about the purchase cycle for sunglasses for men.

TRIGGERS TO BUY

I NEED ARISES

Replace broken/damaged sunglasses
Special occasion e.g. vacation to Hawaii,
outdoor wedding, marathon

II DESIRE STOKED

See it on a friend, a celebrity, someone on the street
See it at retail on display
See it when checking out company website
(browsing Oakley, Ray-Ban, etc.)

III Reward

First paycheck, new job

IV OPPORTUNISTIC

Gift card
Coupon, special deal, price promotions

V GIFT

Usually from girlfriend, wife or parent

INFLUENCES ON DECISION

VERY INFLUENTIAL

Trying it on for fit and look
Previous experience with brand
Peers—especially influential for Sports sunglasses
Expert reviews (magazine or online forums)—
important for Sports sunglasses

SOMEWHAT INFLUENTIAL

Online user reviews
Girlfriend/wife—important for Dressy sunglasses
Salesperson—important in specialty retailers
Online price comparisons

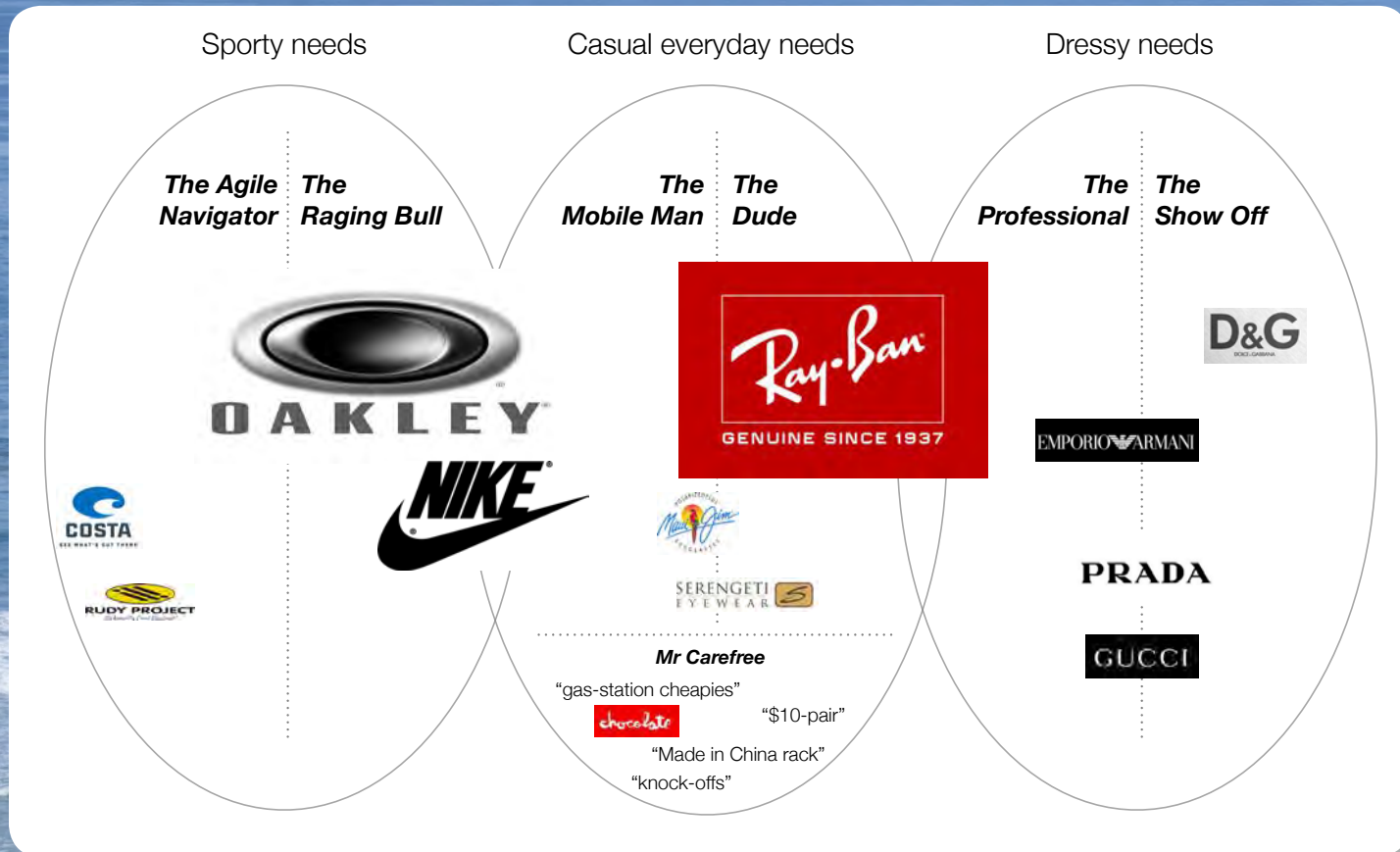


WHERE MEN BUY

The majority go to physical multi-brand stores like Sunglass Hut.
Some go to brand-specific stores like the Oakley Store and Nike Town.
A small handful shop online, usually at discount sites or eBay.



Here's roughly where sunglasses brands fall in the consumer's mind.



The Oakley brand

Men respect Oakley as a famous and well-regarded maker of quality sunglasses for athletes. The brand's image is powerful and consistent—whether you love it or hate it!

Positives

Bold
Intense
Sports core
Edgy

That guy

Out of touch (the 80s)
Tries too hard

Juvenile

Negatives

OAKLEY VS THE WORLD

Oakley versus Ray-Ban

Oakley and Ray-Ban are generally the power brands in the category, competing to be first to mind when men think of sunglasses. Oakley is rooted in the Sports category but stretches its influence into the Casual everyday area. Ray-Ban plays well as the all-purpose, classic brand for Casual everyday needs, but enjoys some credibility extension into the Dressy realm.

Overall, the two brands are pretty-well differentiated.



Sports & athletics
Youthful
Edgy

Ray-Ban

Stylish
Mature
Classic

Oakley versus Nike

Nike, on the other hand, competes head-on with Oakley on its home turf. Men think and talk about Nike and Oakley in very similar terms:



Sporty
Athletic
Pro
Cool

Quality
Durable
Popular
Young

Men recognize that Oakley has a stronger heritage in sunglasses. But the Nike brand's supremacy in "all things sports" gives it a lot of credibility in Sports sunglasses, especially for athletic men with the Raging Bull mindset.

Emotionally and image-wise, men see some subtle differences between the brands.



Radical
Edgy
Loud



Clean-cut
Conservative
Well-spoken

SO WHAT?

All in all, we learned some pretty interesting things. But how does that affect how we think and go about our work?

Here are some thought-starters.



Sales-training

Instead of trying to “size up” our customer when he walks in, and assume the type of sunglasses he’ll want based on appearances—let’s design a set of simple questions and conversation starters to help our sales teams quickly understand a customer’s needs and mindset.

Categories at retail

Keep it simple: Sports, Casual Everyday, Dressy. We can have fun and be creative with what to call them. But don’t complicate things by adding beyond these three straightforward categories.

Beware the Mr Carefree mindset

When men are shopping for sunglasses for Casual everyday use, the biggest marketing and sales challenge is to not let them fall back into the Carefree mindset. Men are often seduced by the affordable style and worry-free maintenance of “gas-station cheapies.” While the rational reasons to spend on a better pair are important (better protection and quality, the warranty), the emotional justifications are just as important (you’re not a kid anymore—time to move up/upgrade to something better, you deserve better).

Untapped opportunity for The Professional mindset

The Oakley brand doesn’t play well in the Dressy category, and we don’t advise diluting the brand to do that. But there’s still an opportunity with current Oakley customers who also need sunglasses for their Professional side. The Professional cares more about having a mature and sophisticated style rather than a luxury, fashion-forward brand—and Oakley offers styles that meet those needs well.

These are just some initial ideas. We hope this project will inspire you to find new opportunities to delight and satisfy our customers, and connect with them more powerfully.



Thank you!

**Yours truly,
The Oakley Men's Eyewear Team**