

EVOLUTION OF VISION CARE

Empowering Patients
to be Consumers

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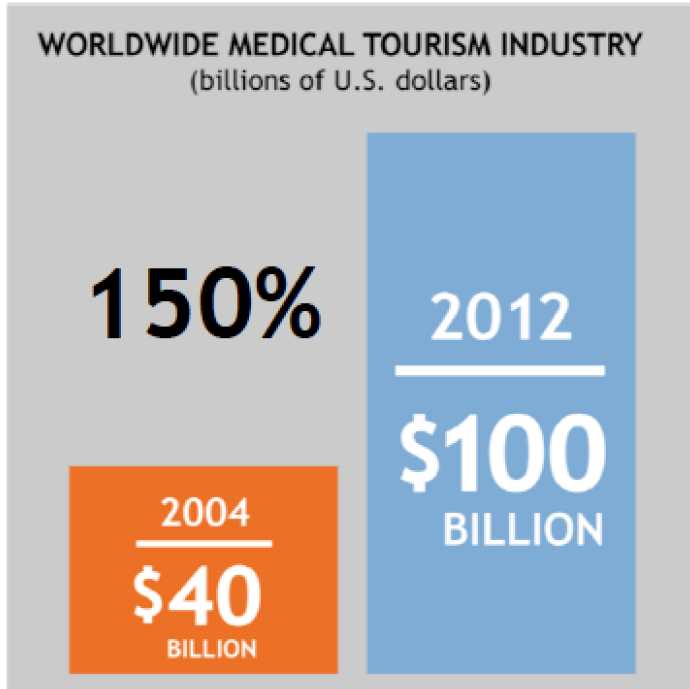


CHANGING FACE OF HEALTHCARE



'PRODUCT-IZATION' OF HEALTHCARE

Exponential Growth in Global Medical Tourism



- Increase in consumer spending over eight years ('04-'12)
- Driven by affordability & availability; quality of care for specialized services

CARE CONSOLIDATION

Dental

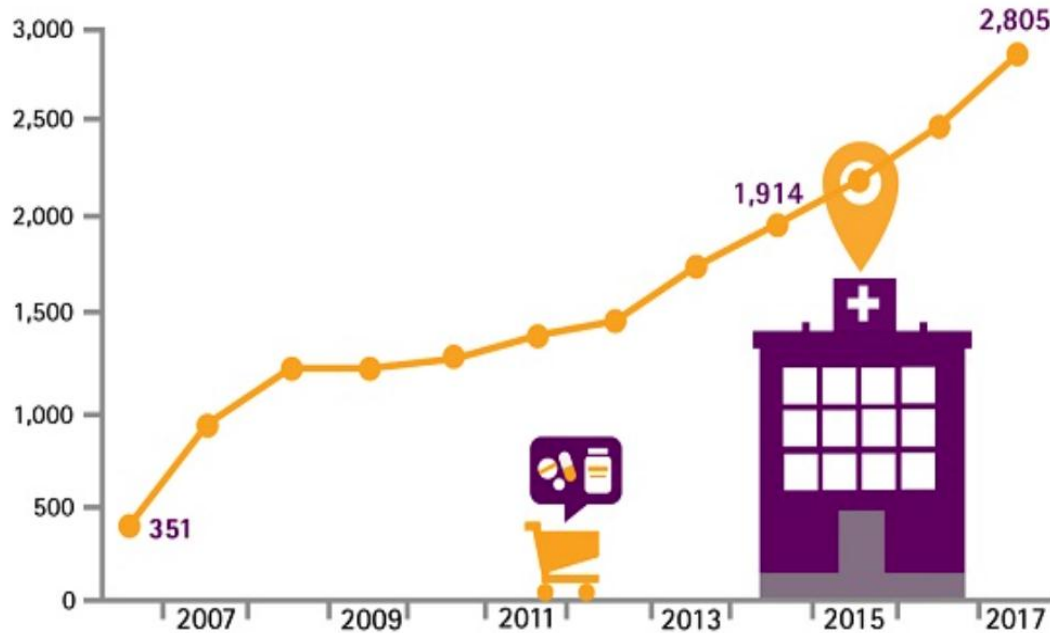
- Management groups consolidating, more effectively managing & growing practices
- Drive cost savings; doctors focus on patient care

Retail pharmacy

- Vertical integration with medical clinics & pharmacy management companies
- Provider agreements realize cost efficiency



RISE IN RETAIL HEALTH & CLINICS



2014

- 1,914 retail clinics
- 16MM patients

2017

- 2,800 clinics
- 25 MM patients

Source: Accenture 2015

PREFERRED CONSUMER ATTRIBUTES IN VISION

HIGH

Convenient location

Past experience

Price

Accepts my insurance

OD quality

Trustworthy

Frame selection

Fast turnaround

LOW



CONSUMERS VALUE:

- Quality
- Service
- Convenience
- Cost



EVOLVING OUR VALUE PROPOSITION



1HR



Address consumer need for quality, service, cost & convenience
in the vision care & product experience

WINNING VISION CARE

- Best doctors
- Best technology



DOCTOR CARE

- Over 70% operate own practice; greater coverage/hours
- Practice full scale optometry
- Competitive exam pricing
- OD NPS rating



BEST TECHNOLOGY

- Clarifye
- Digital refraction
- Retail/lab technology improve Rx accuracy
- On-line relationship management
- Marketing & CRM



PRODUCT

- Contact lenses
- Frames
- Lenses



CONTACT LENSES

- Selection
- Competitive pricing
- Brand equity



FRAMES

- Priced competitively
- In-store try on with MyLook
- Precise fit with Accufit



LENSES

- Latest technology, coatings & design
- Transparent selling experience
- LensSimulator
- Focus on 'Right the First Time'



GLOBAL STORE DESIGN

- Improved OD/retail transition
- Improved shopper experience



PIONEERING CONSUMER HEALTHCARE

