




TAYE Overview

August 2007 – July 2009



think
about your
eyes.com
SM



July, 2009

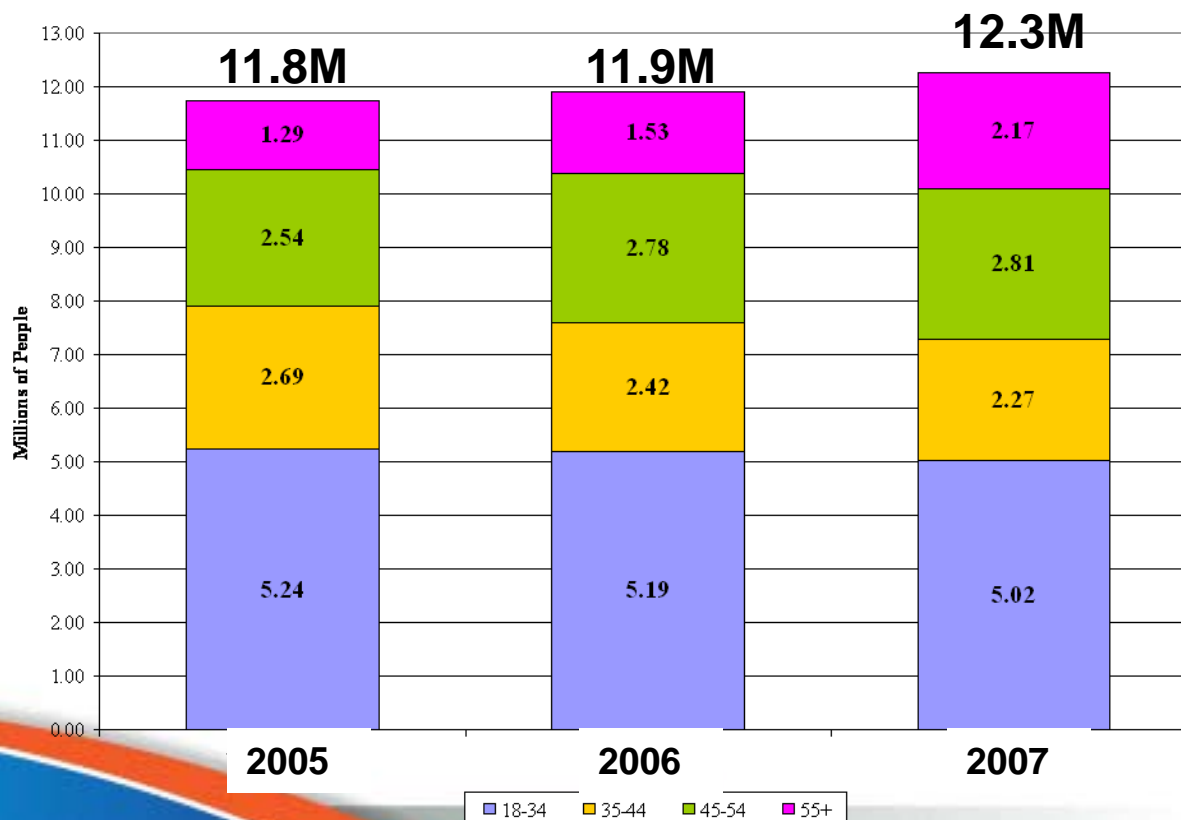
Agenda

- *National problem of lagging eye-care was identified*
- *A public education initiative was devised for testing*
- *Test significantly improved consumer attitudes to eye health and exam attendance*
- *Current industry leaders planning expansion*

The Problem: Lagging Eye Care

12M People need Vision Correction but remain Uncorrected.

- Makes up ~15% of US and growing faster than the population.
- Reasons are addressable by education:
 - +65% due to “Not gotten around to it yet” or “My eyes are not too bad yet”



“Think About Your Eyes” Initiative

Launched Aug ‘07 to Inspire Eye-health Awareness

- **Objective:**

Convince Adults age 18-59, families with kids to get a regular comprehensive eye exam

- **Call to Actions:**

- Call your Eye Doctor to schedule eye exam
- Learn more at ThinkAboutYourEyes.com

- **Location:**

- Test Market: Ft. Worth, Texas
- Control Market: Austin, Texas / Balance U.S.

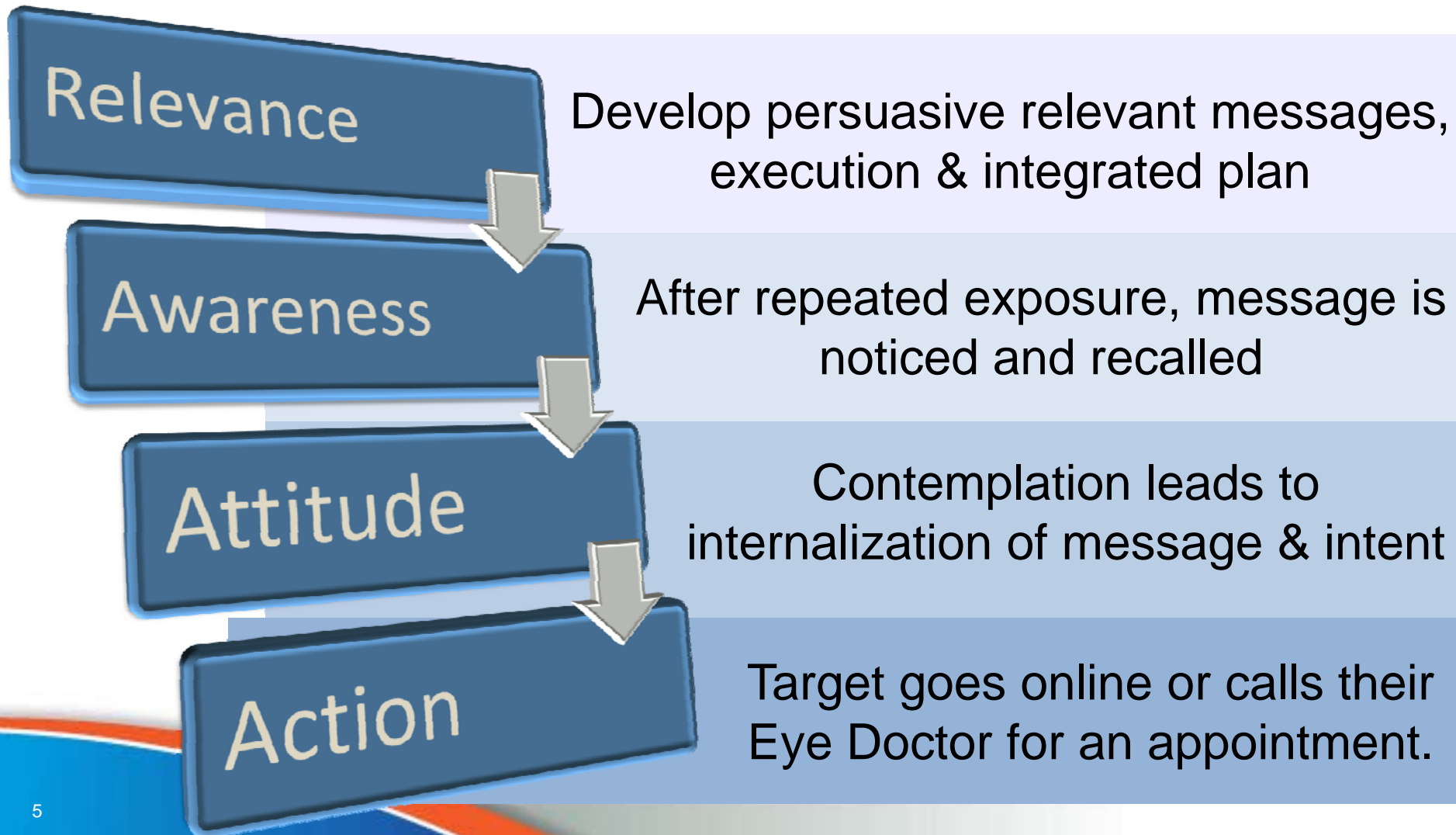
World's
Largest
Eye
Chart



News Coverage

3.4M impressions, + 620K HHs

Consumer Internalization Process



Executed 3 Meaningful Messages to Test in Various Marketing Vehicles

- **Built on an accepted consumer belief:** Most people agree an annual eye exam is important but only half actually do it
- **Benefit-driven messages were crafted** with consumer interviews and testing

75 Concepts



3 Final Messages*

School Performance:

Ensure your child has the best vision for school performance

Eye disease:

Early detection helps prevent major eye disease

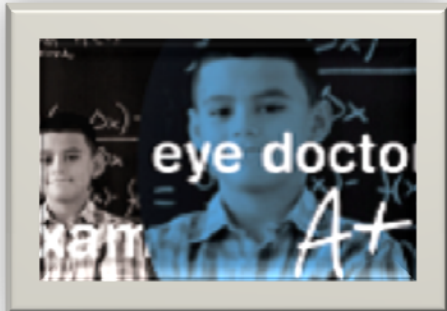
Eye Fatigue:

Eye strain can be minimized with advanced lenses

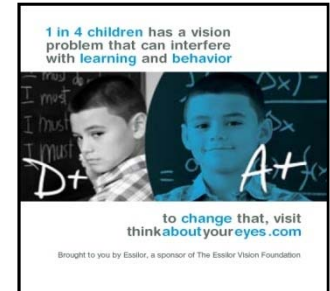
*Meaningful to US consumer at 95% confidence level



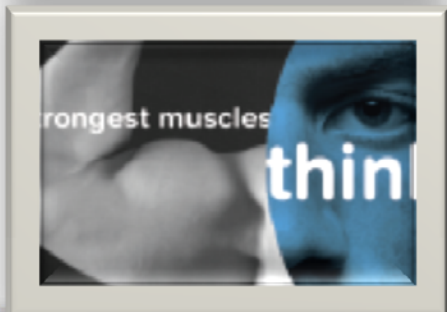
Broadcast TV and Radio Showed Largest Impact out of 10 Vehicles Tested



School Performance.



Eye Disease



Eye Fatigue.



Radio Ad
Eye Fatigue

Radio Traffic
Reads Glaucoma



Newspaper

TV

Consumer Attitudes on Importance of annual exam improved to 95%* vs. Control's 89%

- Health related messages gaining more awareness vs. no increase in control:
 - “Full eye exam is important for early detection of eye health problems”:
+9pts to 55%
 - “Good visual health is important to avoid other health complications”:
+8 pts to 29%

Test Market	
Pre	Post
46%	55%

+ 9 points

21%	29%
-----	-----

+ 8 points

Data Source: Collection 11/29 to 12/20; 200+.

*Q3 “How important do you feel it is for adults to have annual eye examinations?”

Time between Exams Decreased vs. Pre-Test Period

	Pre (July '07) Tarrant County	Post 1 (Dec. '07) Tarrant County	Post 2 (Sep. '08) Tarrant County	Post 3 (Apr. '09) Tarrant County
Base: Total Respondents	-223 A	-240 B	-215 C	-201 D
Full Eye Exam Frequency More often than every two years (Net)	44	46	51	56 ^{ABEFj}
Average # Of Years	2.2 ⁱ	2.1	2	2
Vision Screening Frequency More often than every two years (Net)	55	55	61 ^{EFj}	67 ^{ABEFGHJK}
Average # Of Years	1.9 ^d	1.9 ^d	1.7	1.7

Exams and Industry Sales Grew

August 2007 – May 2009 (Vs. Pre-Test Period, July 2007)	Growth: Eye Exams	Growth: Products* (SV, PAL, B/T, AR)
Tarrant County (TEST)	+12%	+12%
Travis County (CONTROL)	+5%	+3%
Difference	+7%	+9%

- Comprehensive exams driven by <18; simple exams by >18.
- Females 45+ most responsive to messages
- 20% patients were looking for a new eye doctor

92% of Participating Practices found it a valuable Initiative

- 80% - There were benefits to their practice being on the website doctor locator map
- 64% - The initiative could bring long term impact to their practice as well as the eye health industry

• Participating ECP locations June-Aug 2008 survey, 65% response rate

“You covered a great deal of information in your advertising which is great for patient education!”

“I really like what you’re doing. I do think that the consumer is much more aware of today because of the media and internet. Keep up the good work.”

“Overall a great campaign. A definite plus to my practice.”

• Surveys to participating ECPs at final presentation dinner May 2009



Marketing Coalition Developing to Kick-start Roll-out for Industry Growth

– Requires \$30M National Theoretical Plan

Short-term: Luxotica, Essilor and VSP committed to expand TAYE as tested over the next year with improvements from industry learnings.

- To include other companies to complete funding for 2010 launch.
- To dovetail with the outcome of the Eye Health Summit.

Long-term: Growth initiative to continue and be funded by a broader industry coalition of partners and integrate with industry efforts.

Working Coalition Structure for various levels of industry engagement:

- *Core Planners who dedicate significant marketing capability/expertise:*
 - As working board with significant annual funding commitment for 2 years + 1 embedded headcount to manage initiative's projects. Oversees staff directing and executing of plan.
- *Supporting Members who share assets and programs:*
 - Lesser annual funding commitment for 2 years ; existing marketing programs/assets available. No dedicated headcount; but key contact person who provides broad input.
- *Contributing Members that align existing assets/programs:*
 - No annual funding commitment, No dedicated headcount; but key contact person.

