



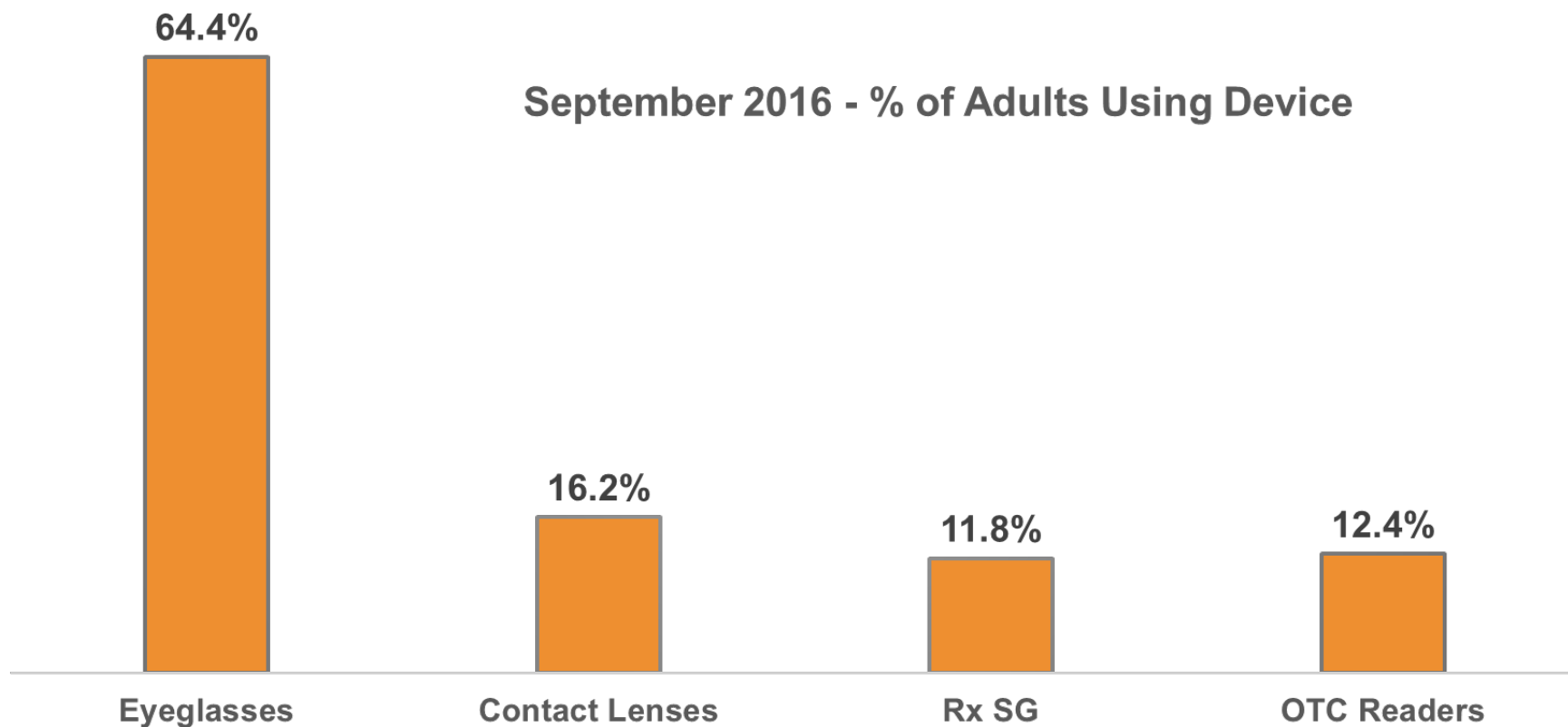
2016 RESEARCH UPDATE



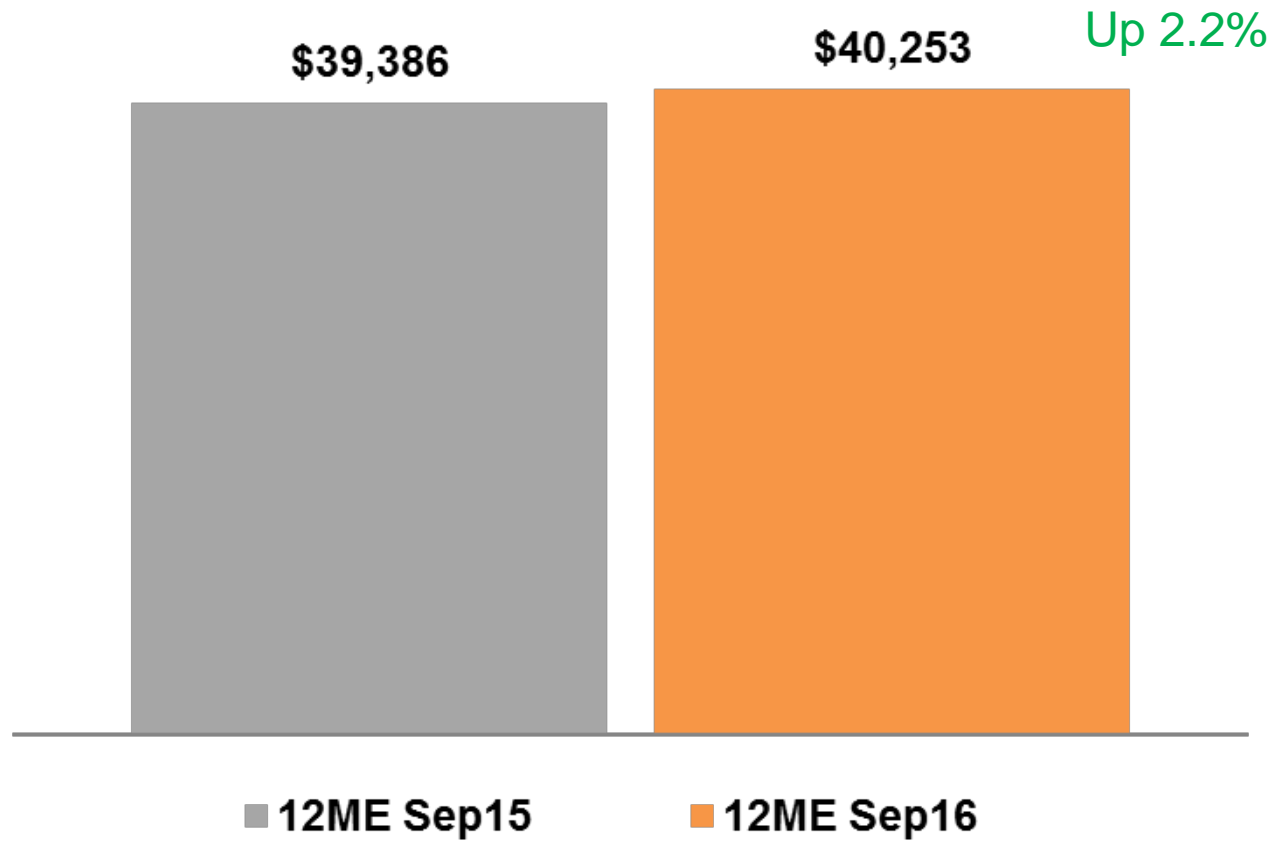
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Vision Correction

September 2016 - % of Adults Using Device

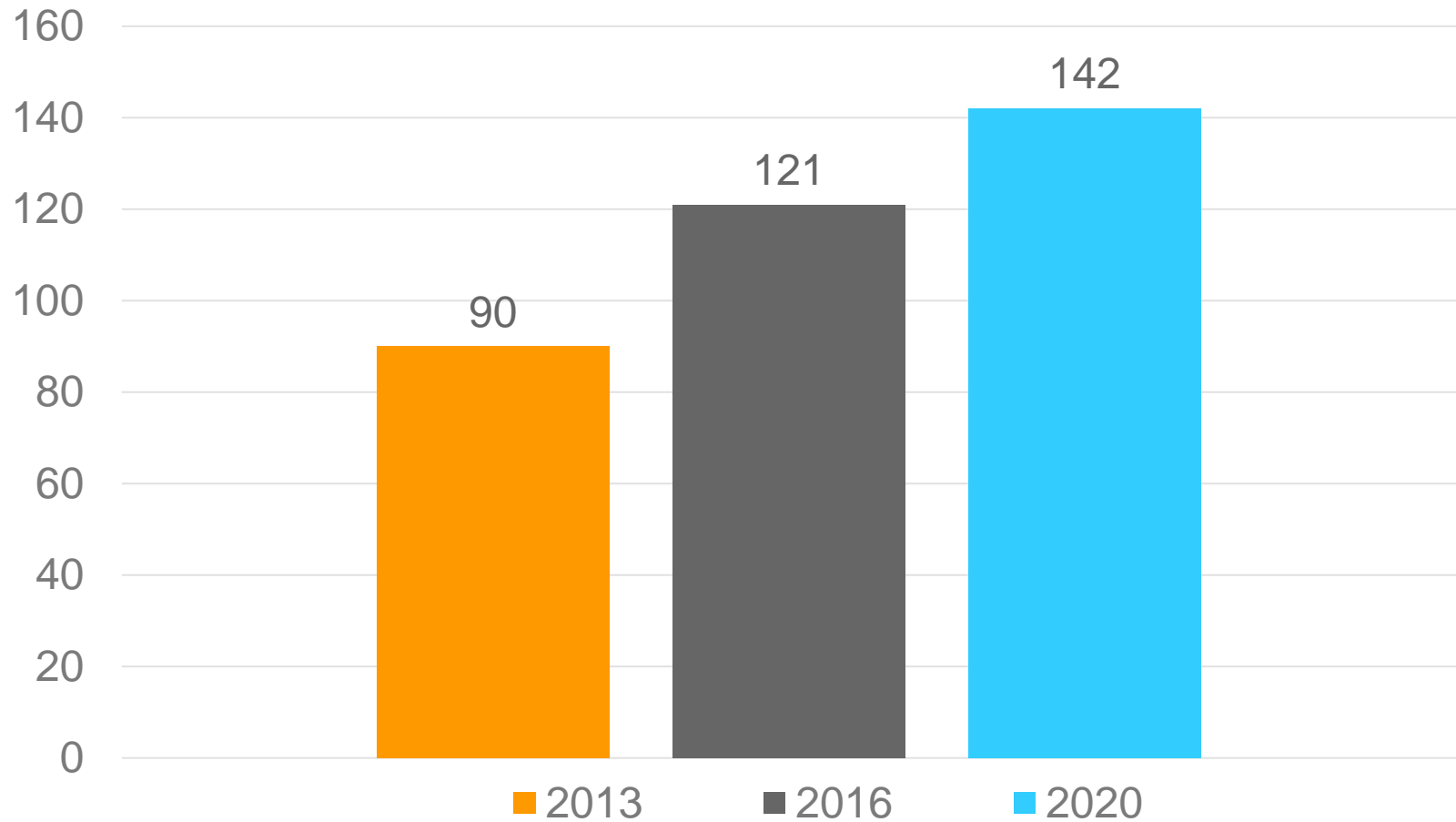


All Retail Vision Care Products & Services Trend



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Global Eyewear Trend

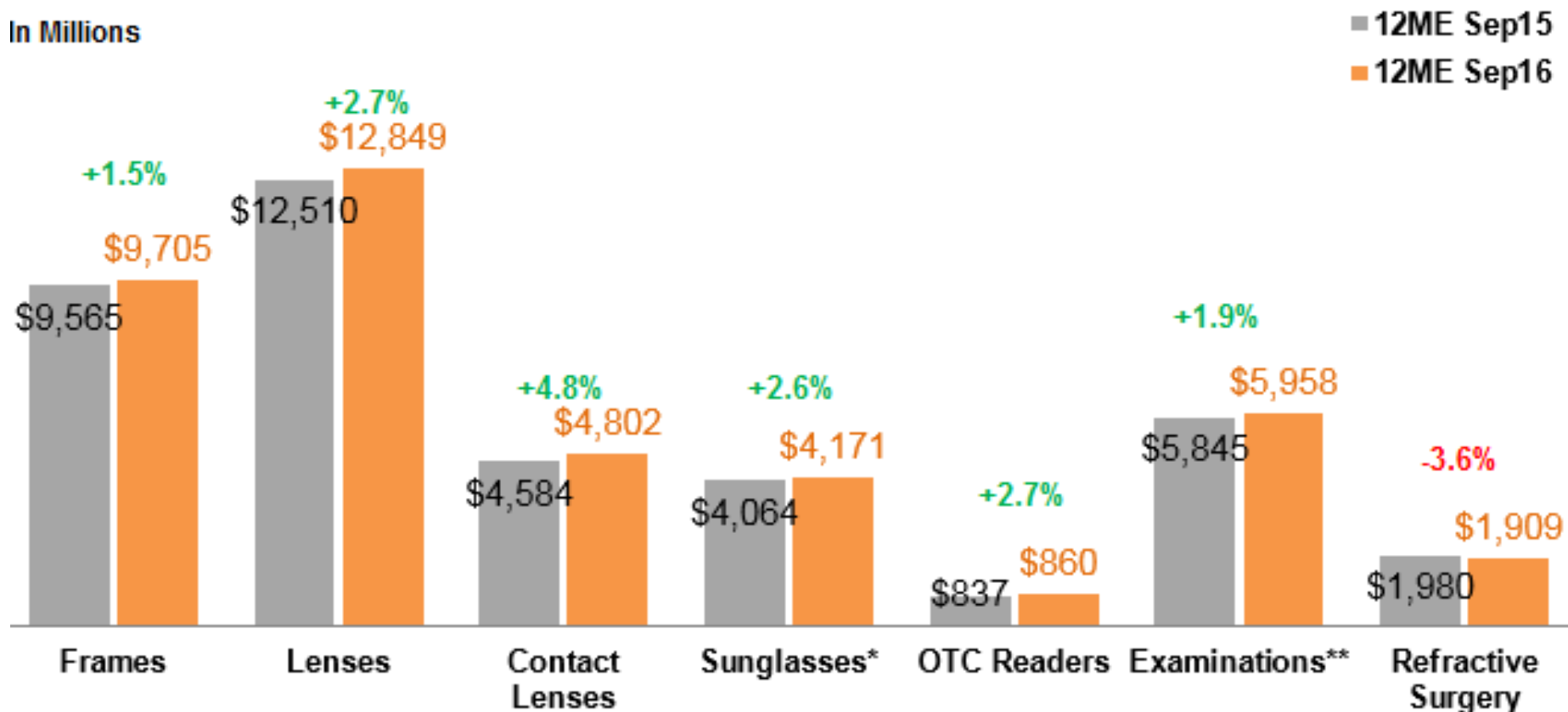


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Billions US \$
Euromonitor, Statista

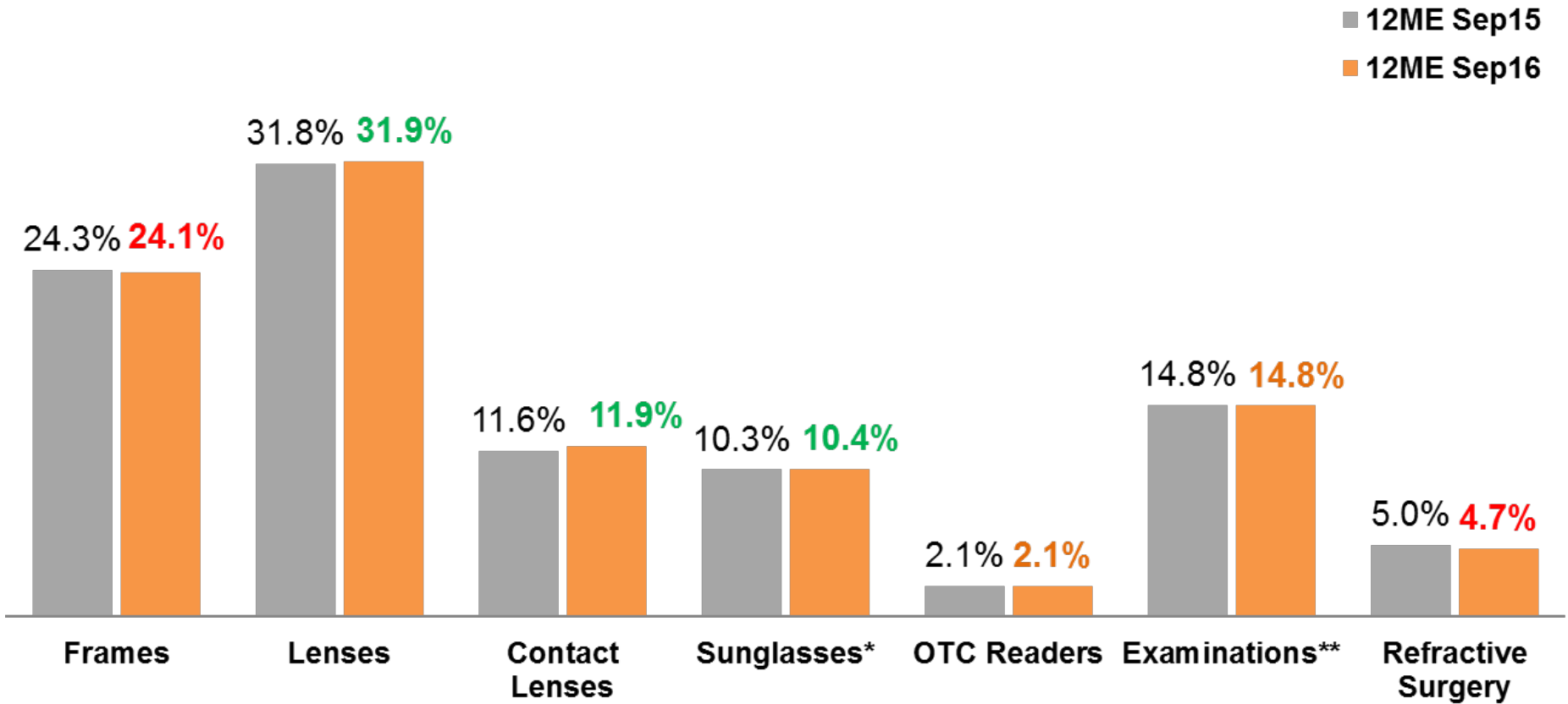
Dollars

In Millions



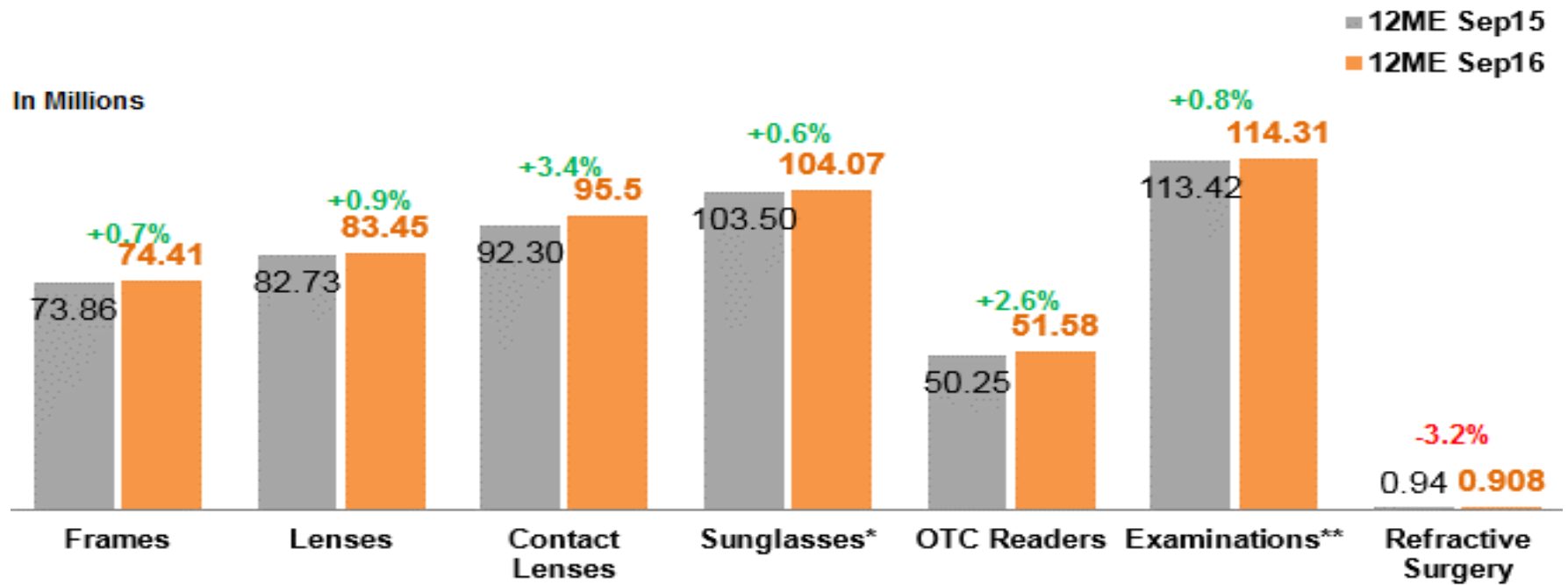
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Dollar Shares



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Units



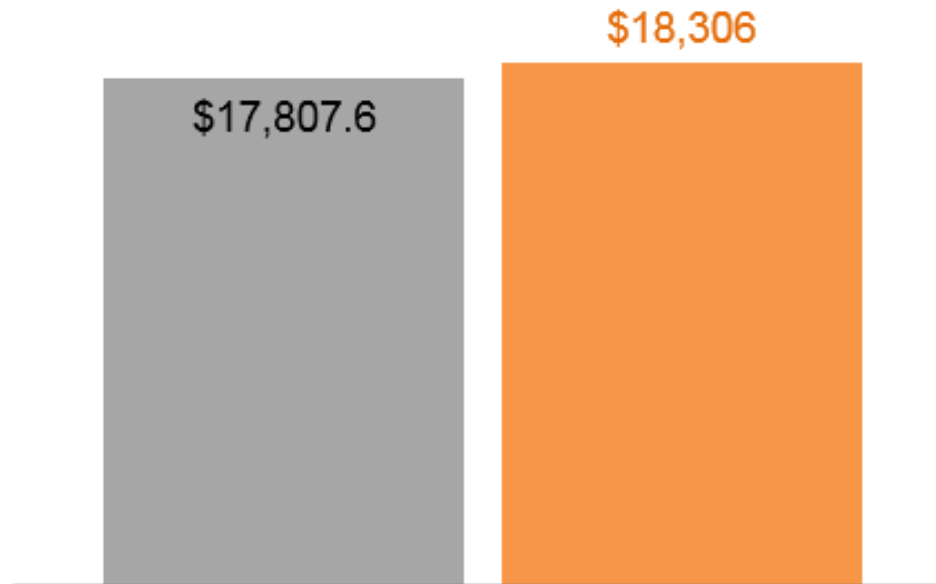
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Independents: \$

In Millions

2015/2016 +2.8%

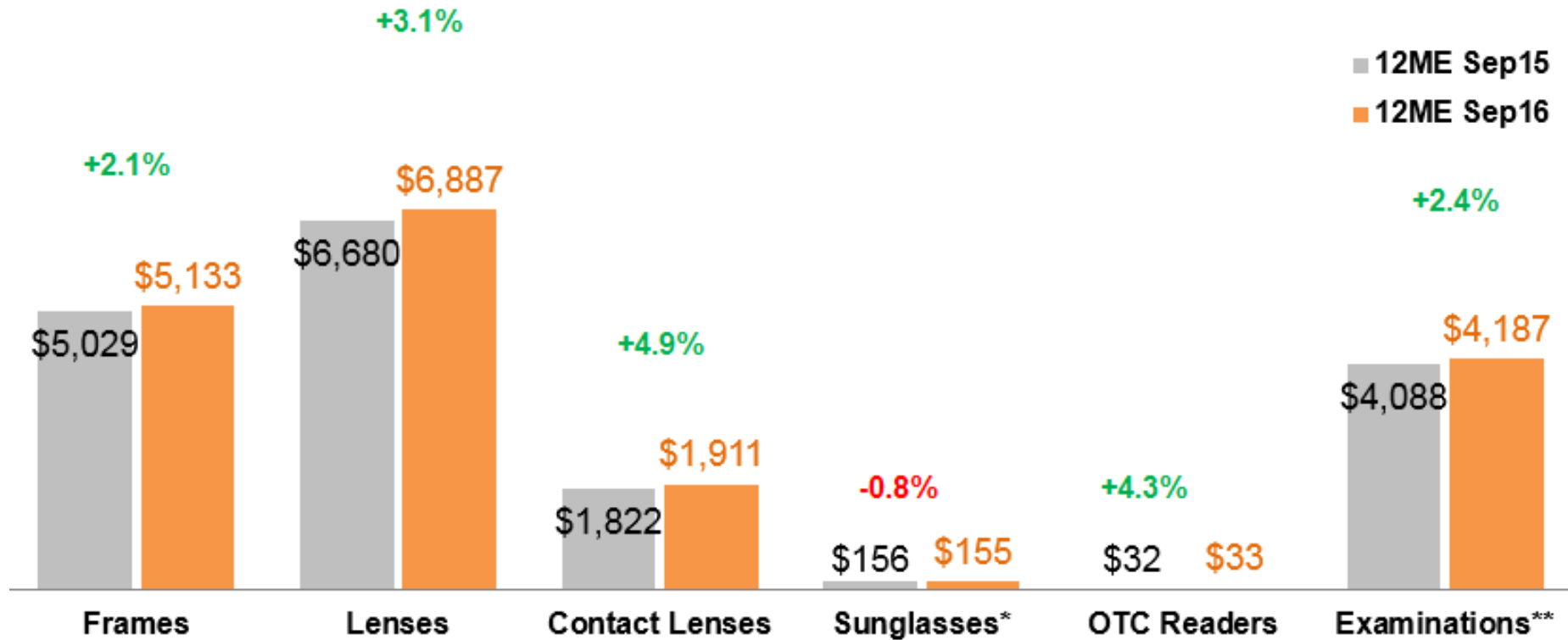
■ 12ME Sep15
■ 12ME Sep16



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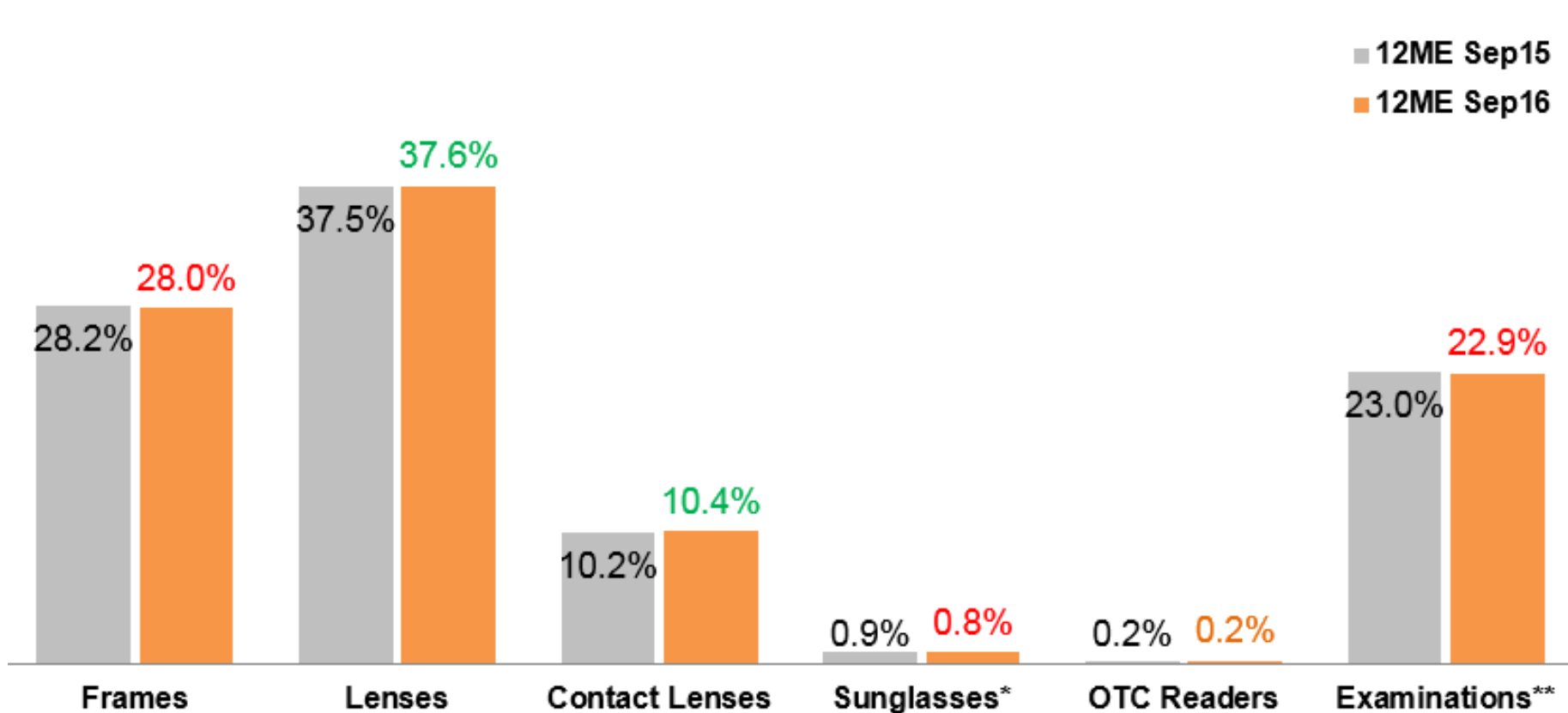
Independents: \$

In Millions



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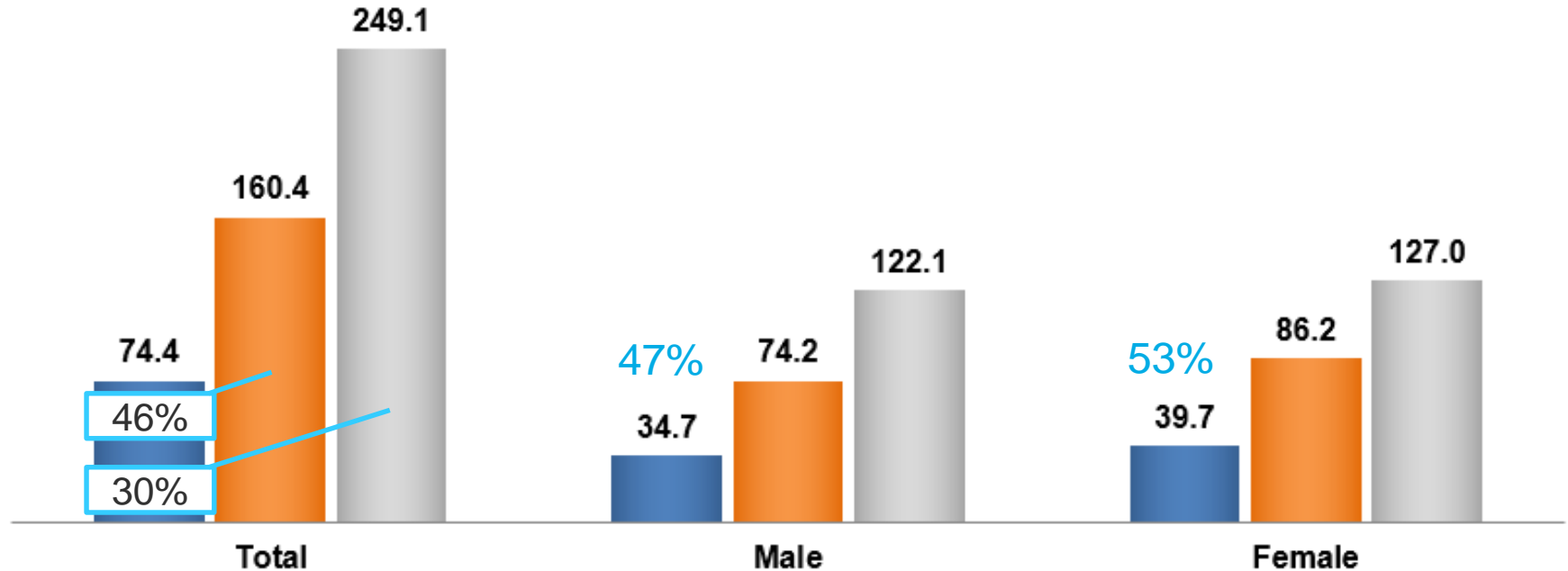
Independents: \$ Share by Category



Units and Gender

In Millions

- Units Sold 12ME Sep16
- Number of People Wearing 12ME Sep16
- Population 12ME Sep16 as Benchmark

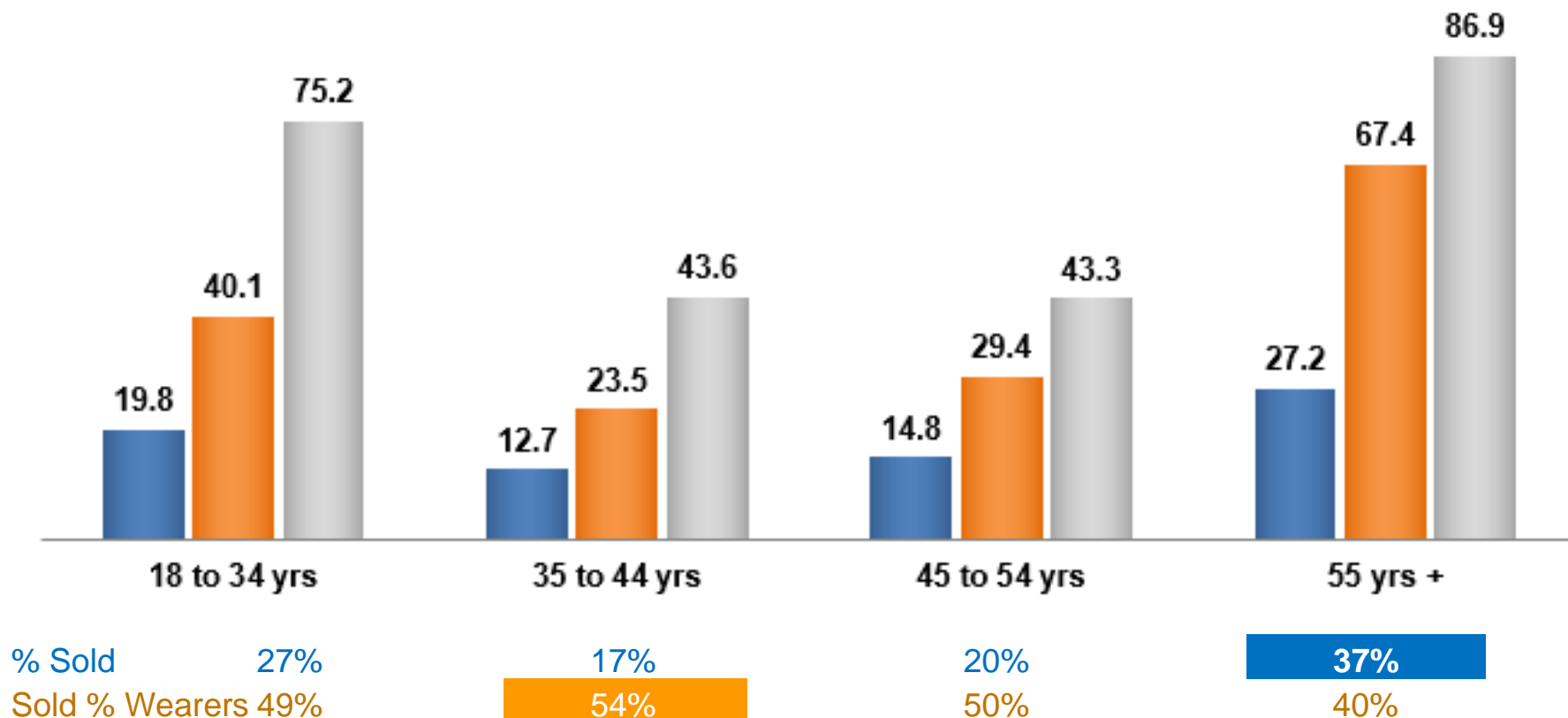


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Units and Age

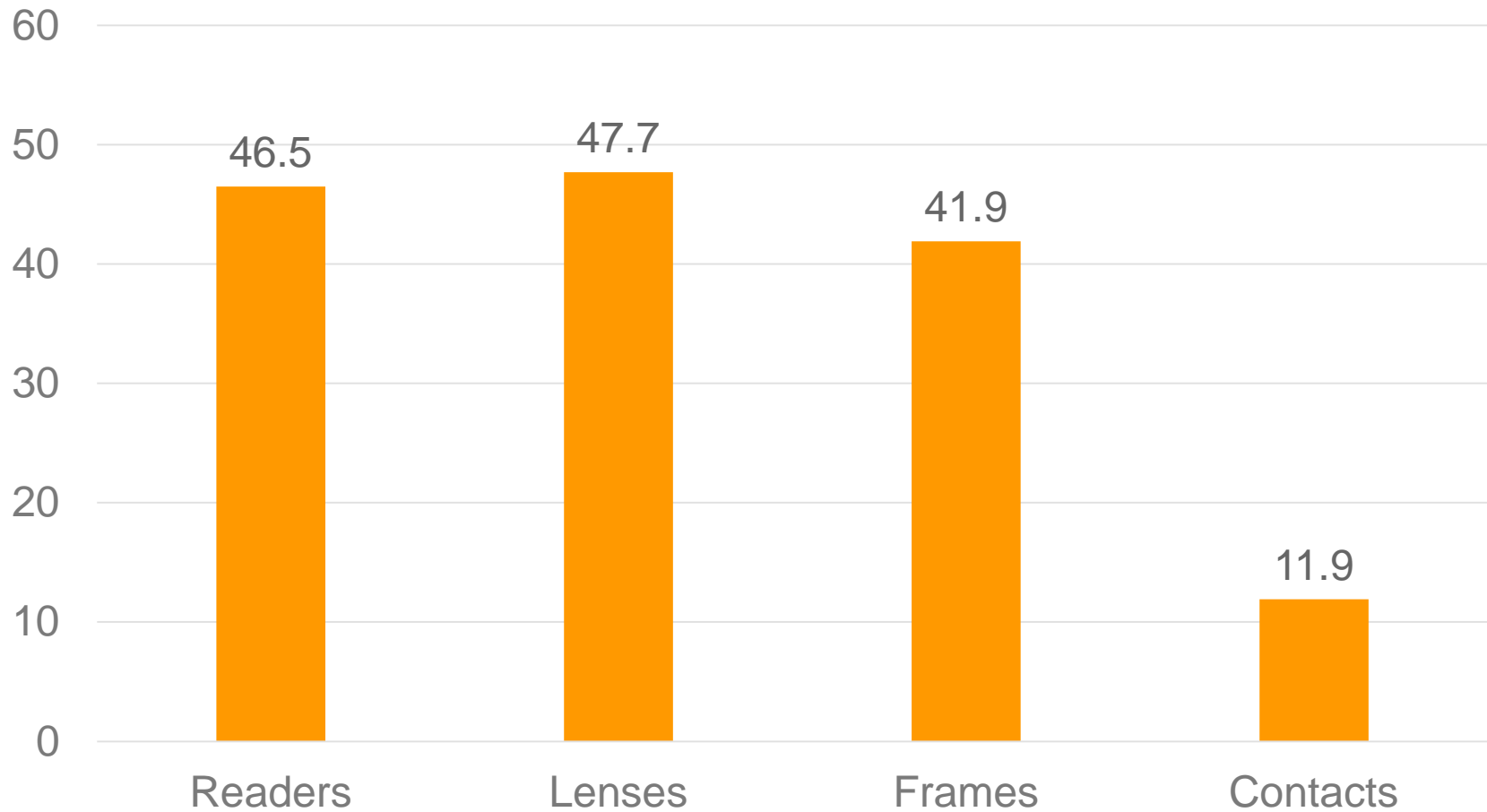
In Millions

- Units Sold 12ME Sep16
- Number of People Wearing 12ME Sep16
- Population 12ME Sep16 as Benchmark



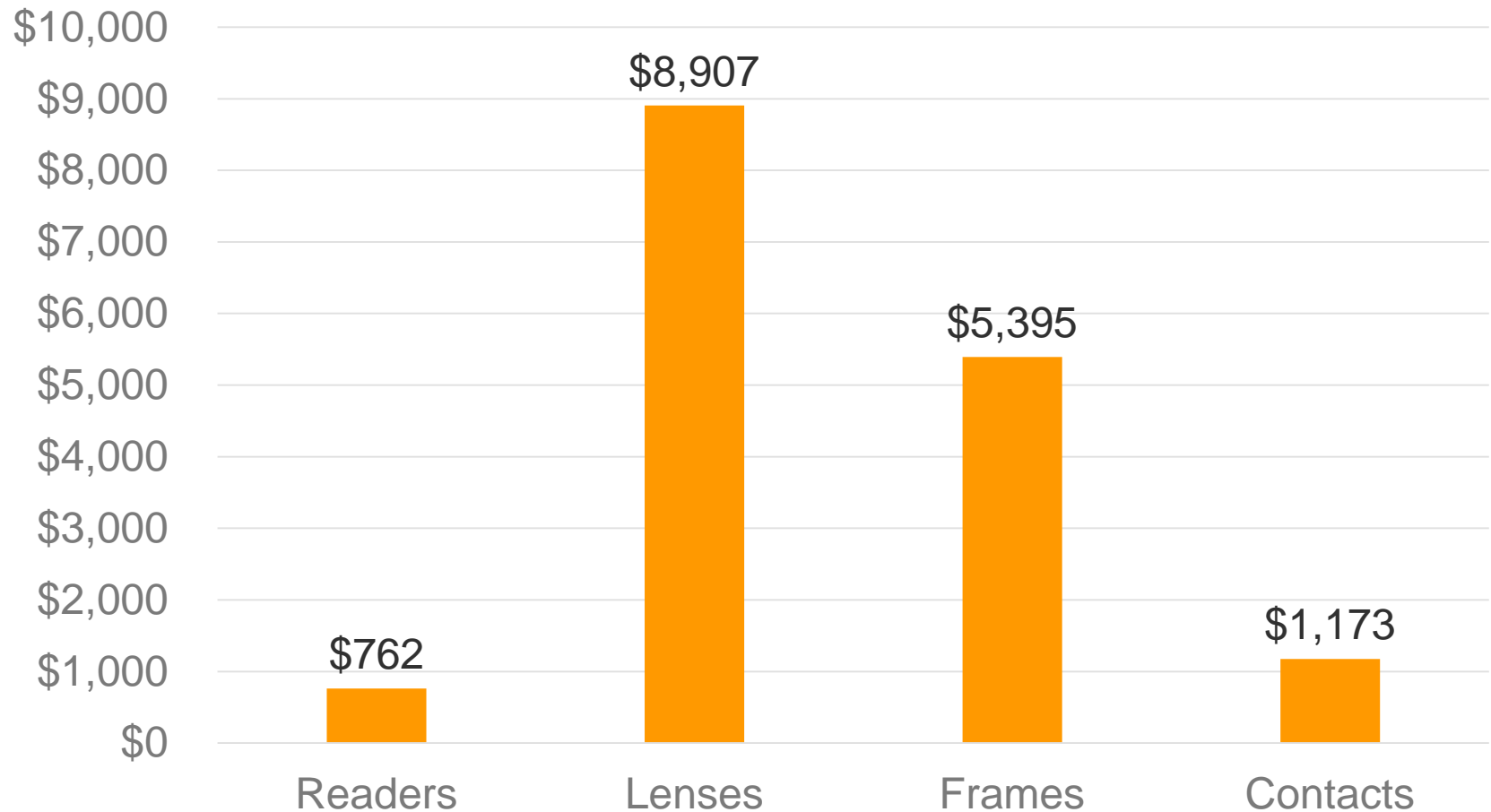
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Units: Age 45+ - 12ME Sep 16 - by Device Type



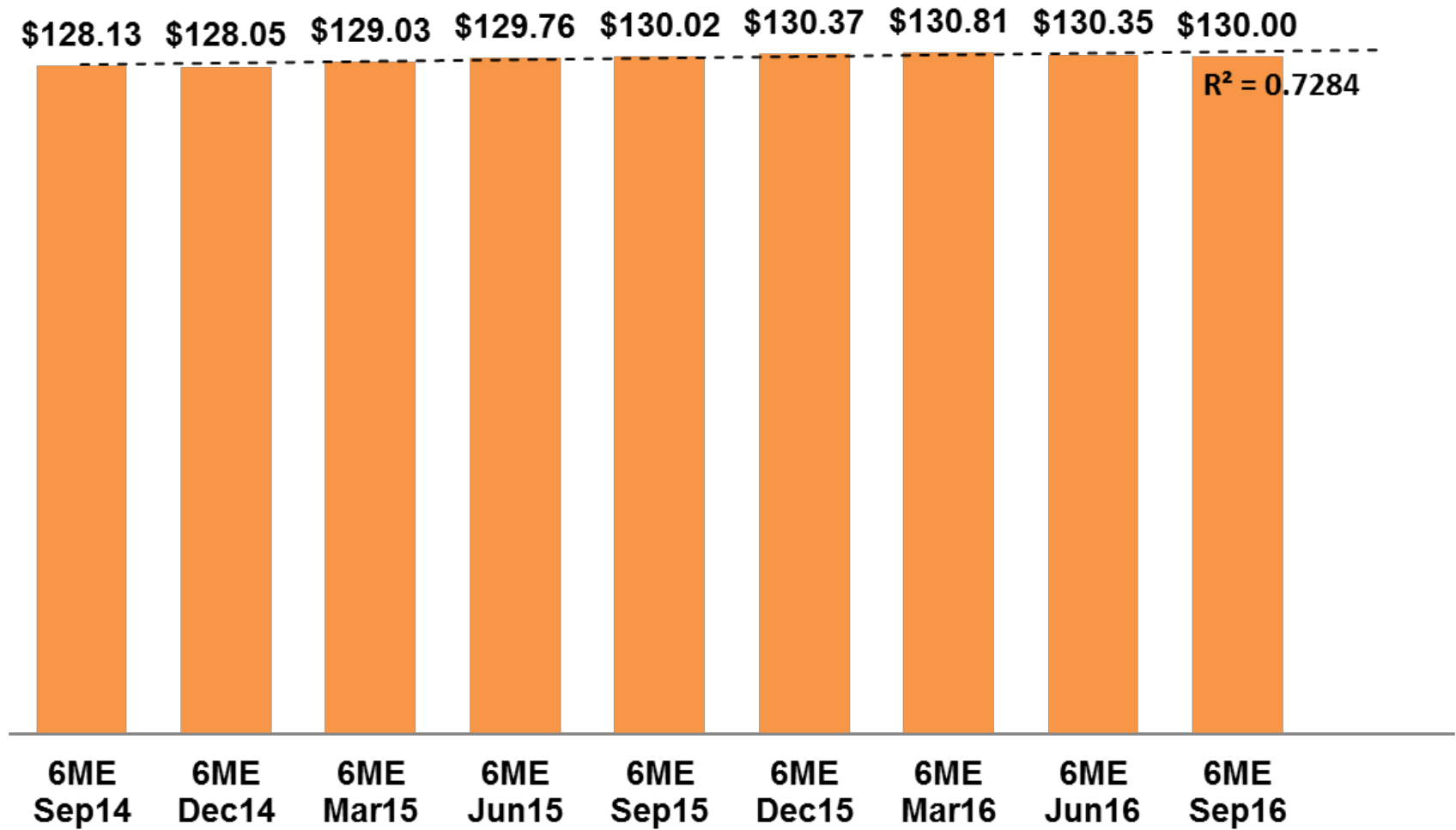
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Dollars: Age 45+



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Retail \$ Trend

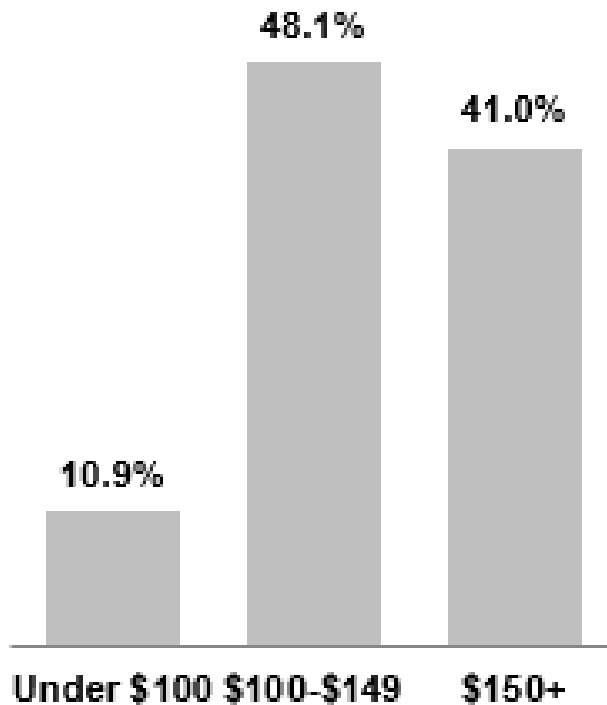


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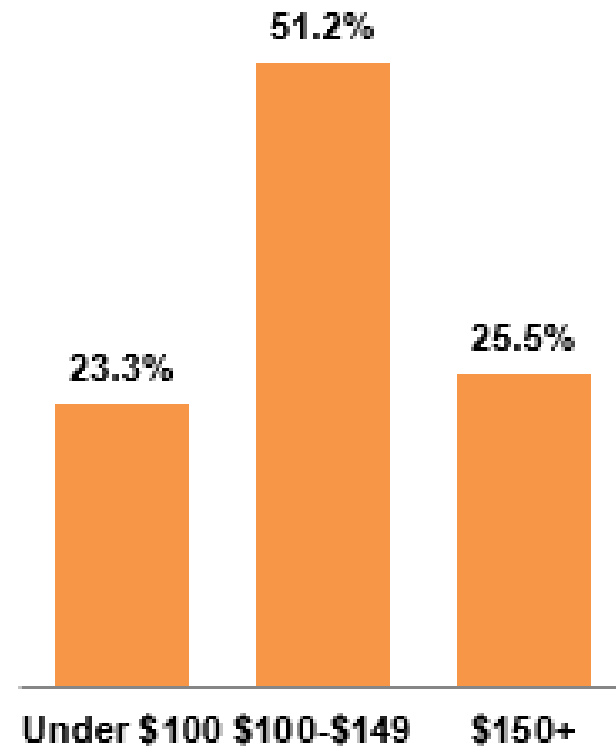
Dollar and Unit Share by Retail Price

12ME Sep16

Dollars

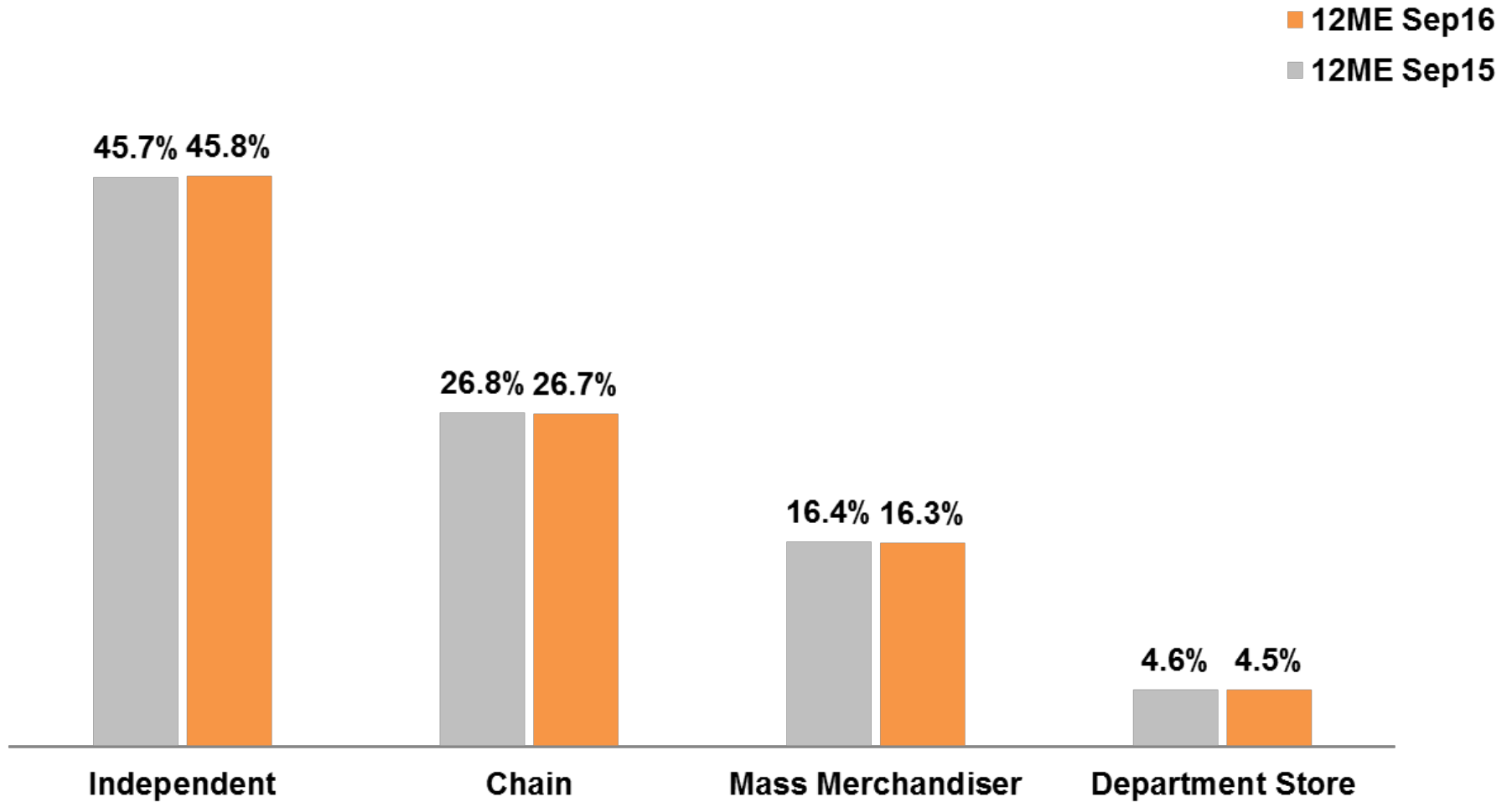


Units



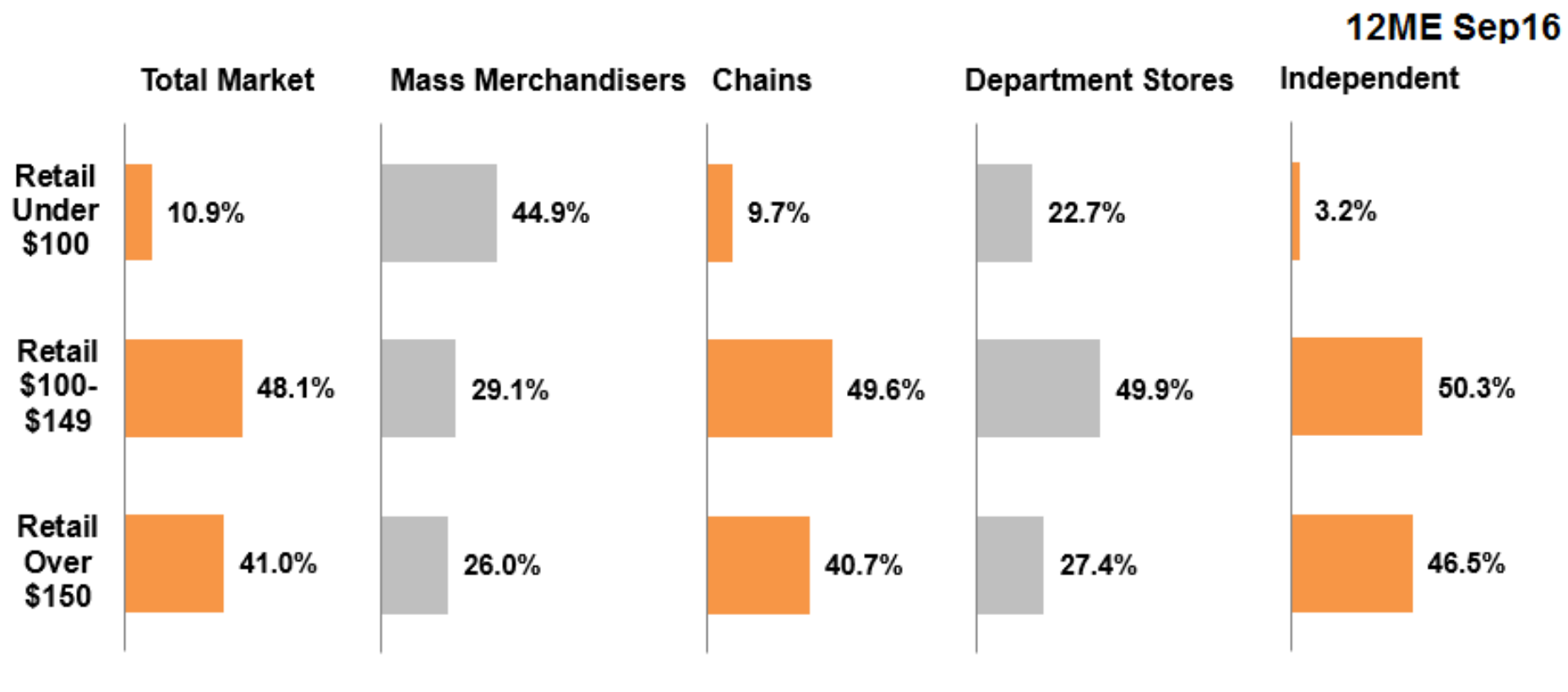
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Unit Share by Channel



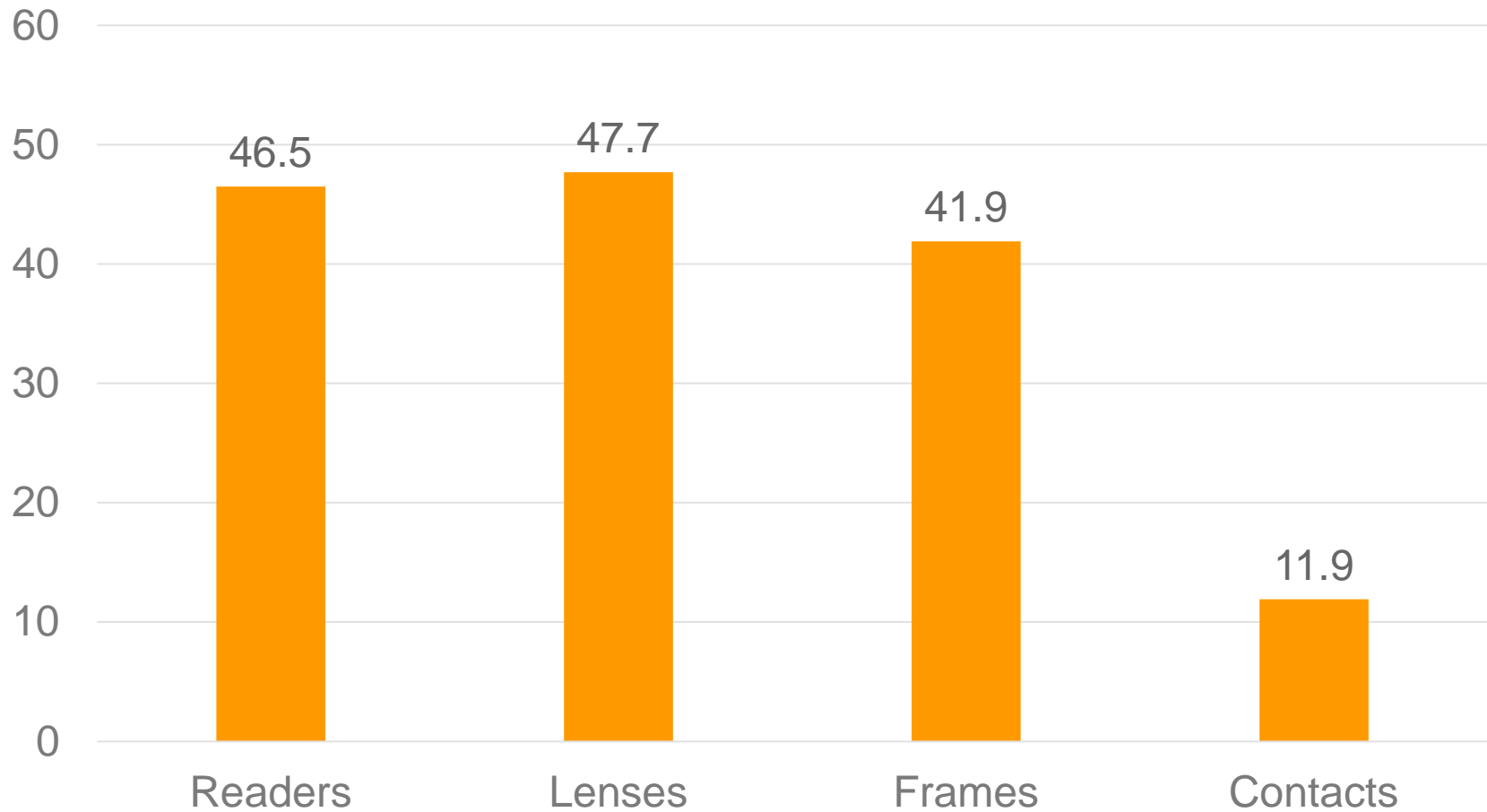
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Dollar Share by Price & Channel



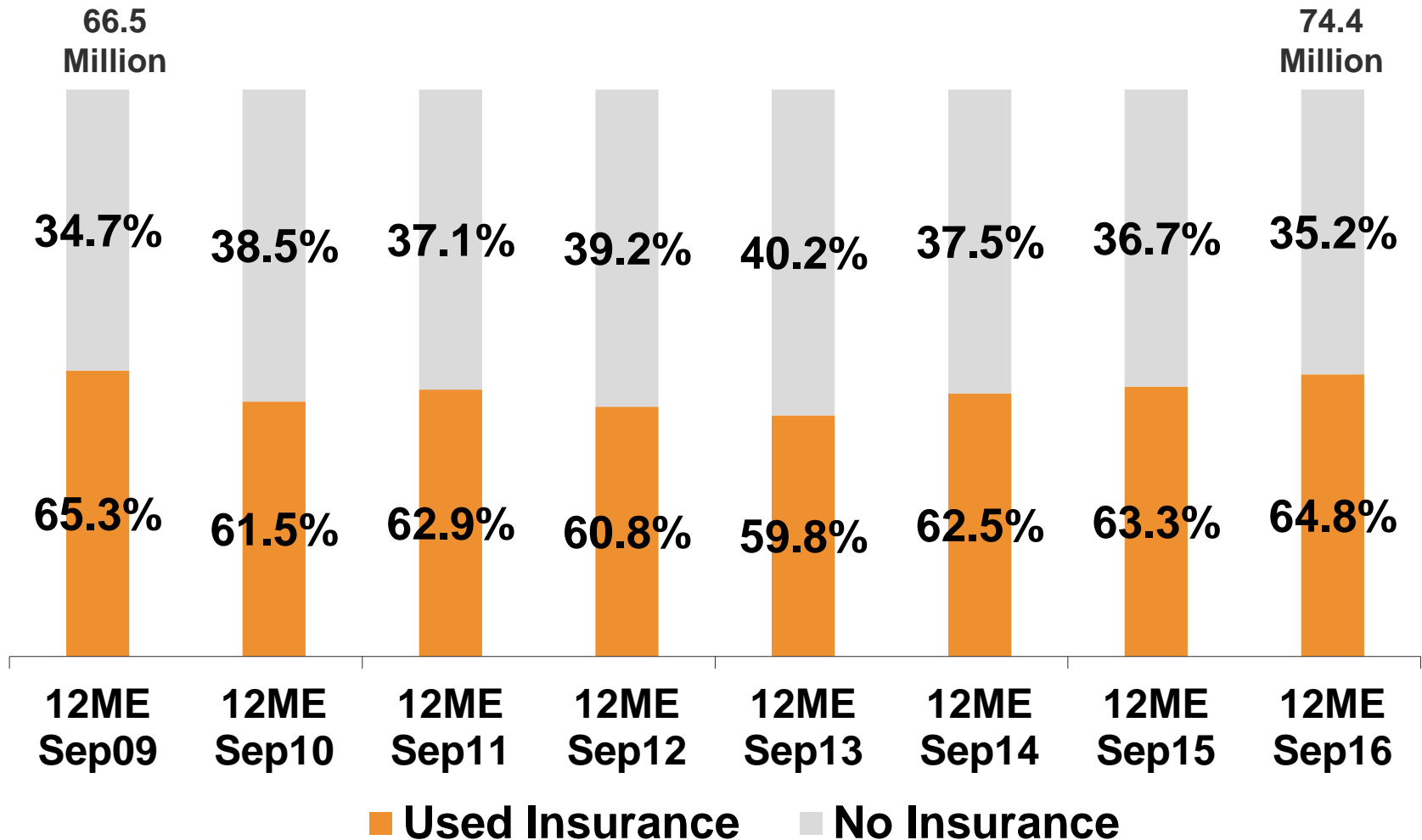
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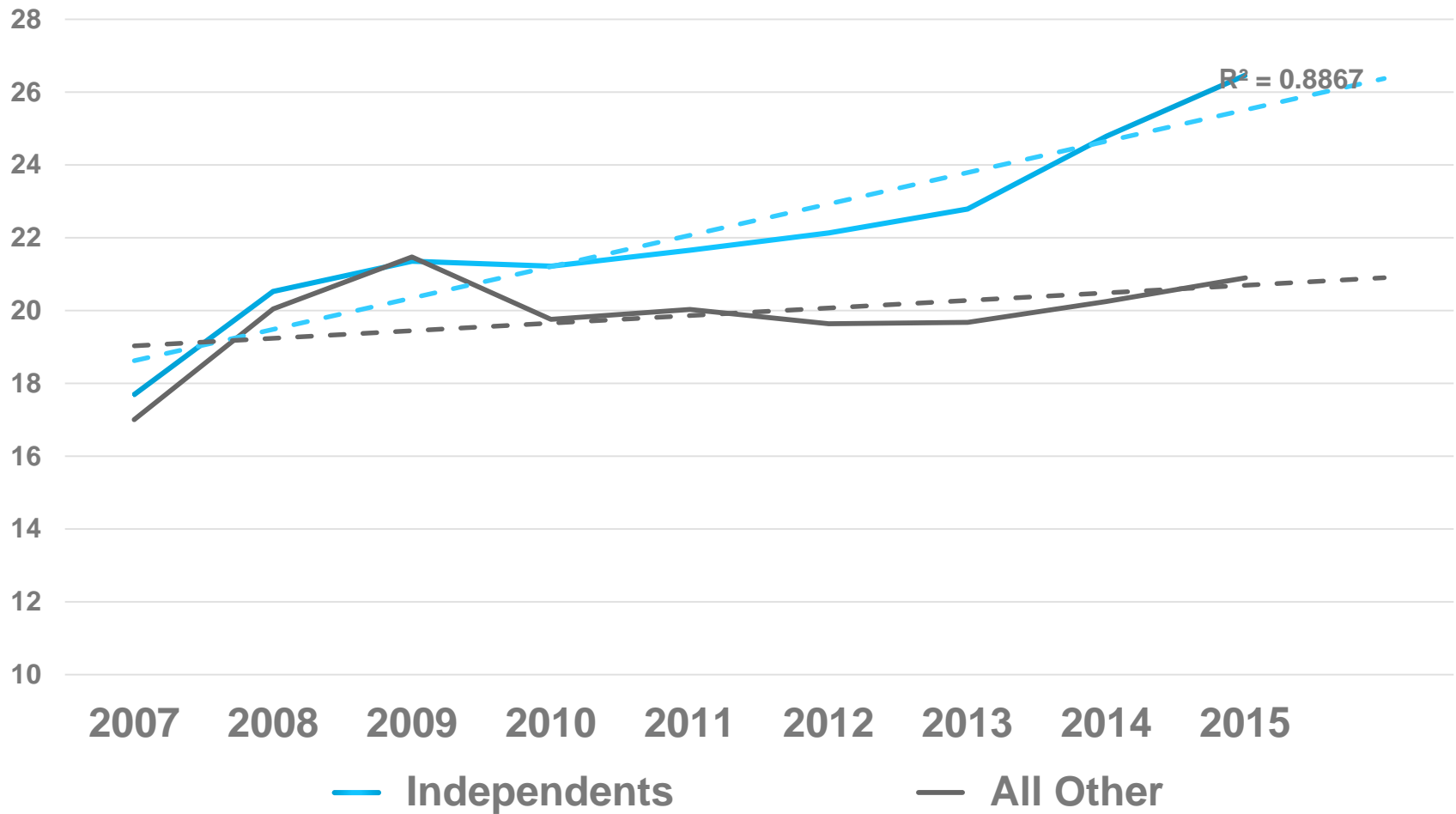
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Frames: MVC Share



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Frames Purchased with MVC Participation



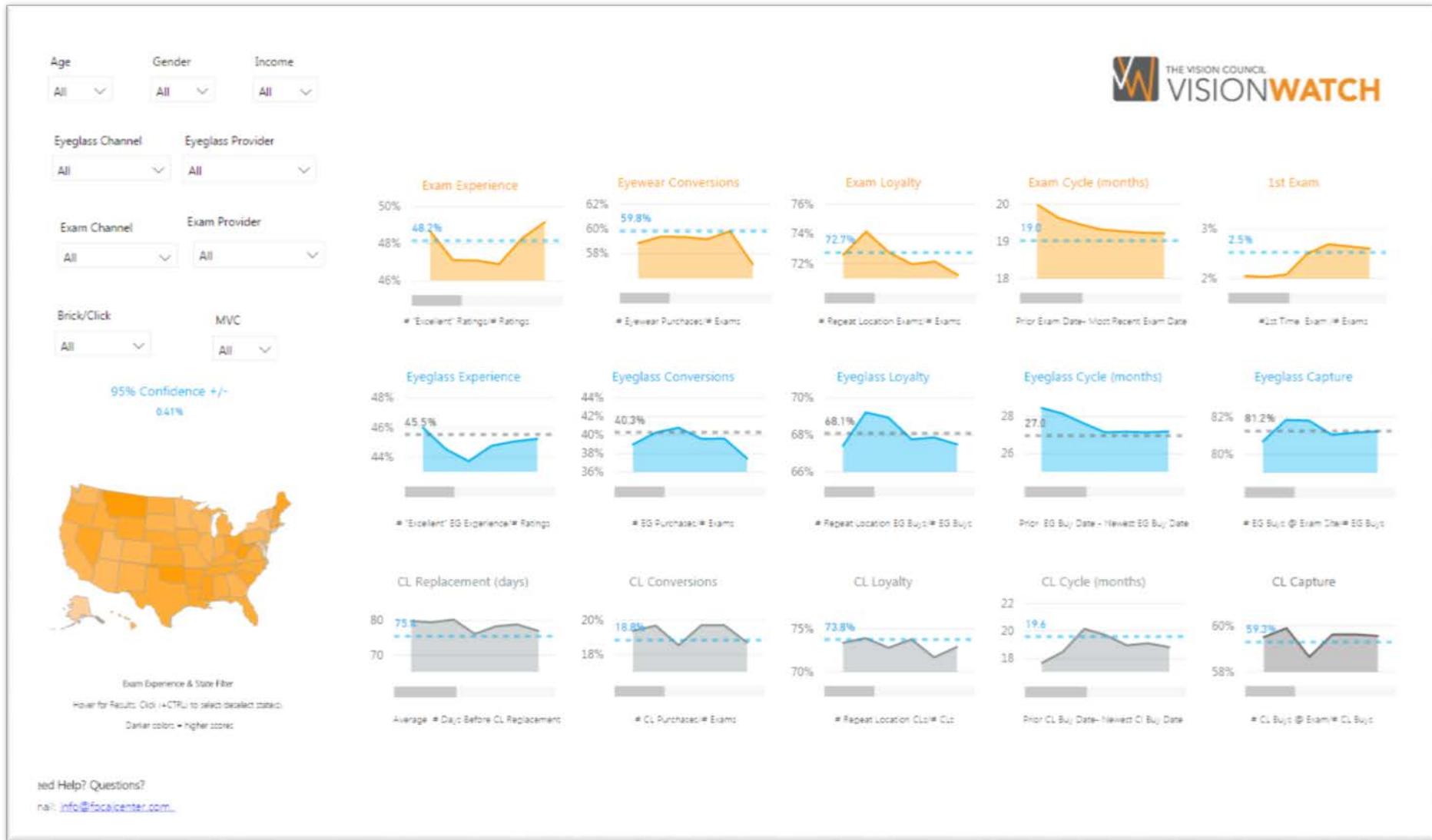
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VisionWatch New Tools

- **Dashboard**
 - Interactive access
 - Timely updates
 - 4 years of trends and benchmarks
 - Exams, glasses and contacts



Dashboard Tools



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Age: All
Gender: All
Income: All

Eyeglass Channel: All
Eyeglass Provider: All

Exam Channel: All
Exam Provider: All

Brick/Click: All
MVC: All

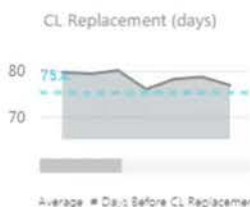
95% Confidence +/-
0.41%



Exam Experience & State Filter

Hover for Results. Click (+CTRL) to select/deselect state(s).

Darkier colors = higher scores



Need Help? Questions?

email: info@visioncouncil.com



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