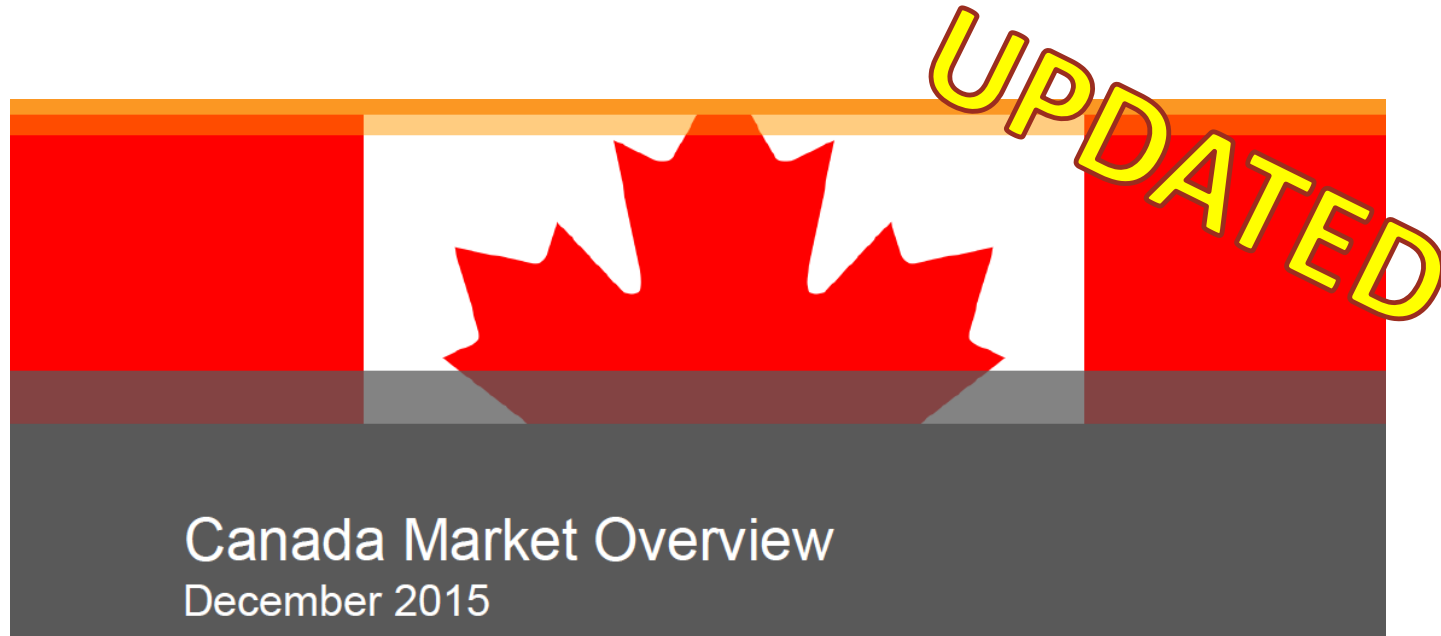






## Q4 2015 CANADIAN VS. USA MARKET OVERVIEW



Survey data herein is provided by VisionWatch Canada  
and is distributed by VuePoint IDS with consent of The Vision Council.

# Vision Correction and Exams

|  | <br>CA | <br>US |
|--|---|---|
| Uses any form of Vision Correction             | 74.1%   | 76.2%   |
| Prescription Eyeglasses                        | 65.3%   | 64.3%   |
| Contact Lenses <sup>†</sup>                    | 14.2%   | 16.4%   |
| Reading Glasses (OTC) <sup>†</sup>             | 12.3%   | 12.5%   |
| Prescription Sunglasses <sup>†</sup>           | 10.1%   | 11.7%   |
| <small>(Wears At All)</small>                  |   |   |
| Need Vision Correction but Don't Use           | 5.8%  | 5.3%  |
| Private Vision Insurance Coverage <sup>‡</sup> | 20.1%   | 50.2%   |
| Eye Exam within Last 6 Months                  | 25.9%   | 22.6%   |
| Ophthalmologist <sup>‡</sup>                   | 16.8%   | 69.3%   |
| Independent Optical Store                      | 49.6%   |   |
| Retail Optical Chain                           | 19.9%   | 14.3%   |
| <small>(Of Exam Patients)</small>              |   |   |

<sup>†</sup>Based upon information and guidance from vision industry stakeholders these values were edited *upward* from consumer reported data

<sup>‡</sup>Based upon information and guidance from vision industry stakeholders these values were edited *downward* from raw consumer data

# Corrective Eyewear Frames



CA



US

|  | CA       | US       |
|--|----------|----------|
| <b>Prescription Eyeglass Usage</b>                                   | 65.3%    | 64.3%    |
| Purchased in Last 6 months <small>(Of Respondents Using)</small>     | 17.0%    | 14.1%    |
| Purchased Complete Eyeglass <small>(Frame and Lens)</small>          | 86.9%    | 90.4%    |
| Repurchase Cycle <small>(years)</small>                              | 2.5      | 3.6      |
| <b>Frames Market</b> <small>(Approximate twelve month sales)</small> |          |          |
| Units Sold <small>(Millions of pairs)</small>                        | 7.3      | 74.0     |
| Total Value <small>(Millions of CAD)*</small>                        | \$ 1,407 | \$12,302 |
| Average Price Paid <small>(CAD)</small>                              | \$ 192   | \$ 166   |
| <b>Channel Sales</b> <small>(by units)</small>                       |          |          |
| Independent Optical Store  | 42.5%    | 45.6%    |
| Retail Optical Chain   | 42.6%    | 26.8%    |
| Other (Dept Store, Mass Merchants)                                   | 14.9%    | 27.5%    |

\*Based upon information and guidance from vision industry stakeholders these values were edited *upward* from consumer reported data

# Corrective Lenses



CA



US

## Lens Market (Approximate twelve month sales)

|   |          |          |
|---|----------|----------|
| Units Sold <small>(Millions of pairs)</small> | 8.5      | 82.9     |
| Total Value <small>(Millions of CAD)</small>  | \$ 1,829 | \$16,130 |
| Average Price Paid <small>(CAD)</small>       | \$ 216   | \$ 195   |
| Single Vision                                 | \$ 144   | \$ 132   |
| Multifocal                                    | \$ 347   | \$ 134   |
| Progressive                                   | \$ 303   | \$ 337   |

## Lens Styles (by units)

|               |       |       |
|---------------|-------|-------|
| Single Vision | 58.1% | 52.4% |
| Multifocal    | 12.6% | 17.3% |
| Progressive   | 29.4% | 30.3% |

## Lens Coatings (by units)

|                        |       |       |
|------------------------|-------|-------|
| Photochromic           | 12.2% | 15.7% |
| Anti-Reflective        | 62.1% | 30.1% |
| Sun Tinted / Polarized | 8.8%  | 7.3%  |

# Plano Sunwear



CA



US

## Plano Sunglass Usage

|   | CA    | US    |
|---|-------|-------|
| <b>Wears Plano Sunglasses</b> (Costing UNDER \$50 CAD or USD) | 39.5% | 64.5% |
| <b>Wears Plano Sunglasses</b> (Costing OVER \$50 CAD or USD)  | 24.4% | 22.7% |

## Plano Sunglass Market (Approximate twelve month sales)

|                                       | CA     | US       |
|---------------------------------------|--------|----------|
| <b>Units Sold</b> (Millions)          | 10.7   | 103.7    |
| <b>Total Value</b> (Millions of CAD)* | \$ 655 | \$ 5,202 |
| <b>Average Price Paid</b> (CAD)*      | \$ 61  | \$ 50    |



## Channel Sales (by units)

|   | CA    | US    |
|---|-------|-------|
| <b>Independent Optical Store</b> <sup>+</sup> | 6.5%  | 1.2%  |
| <b>Retail Optical Chain</b>                   | 4.9%  | 1.3%  |
| <b>Department Store</b> <sup>-</sup>          | 7.1%  | 4.5%  |
| <b>Sunglass Specialty Store</b>               | 3.8%  | 12.3% |
| <b>Pharmacy / Drugstore</b>                   | 12.4% | 9.2%  |
| <b>Mass Merchandiser</b>                      | 8.7%  | 24.5% |
| <b>Sporting Goods Store</b>                   | 3.2%  | 2.7%  |
| <b>Other</b>                                  | 53.5% | 44.3% |

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\*Based upon information and guidance from vision industry stakeholders these values were edited *downward* from raw consumer data

# Readers and Contact Lenses

|   | <br>CA | <br>US |
|---|---|---|
| <b>Reading Glasses (OTC) Usage</b>  | 12.3%   | 12.5%   |
| Approximate Units Purchased <small>(Twelve month sales, millions)</small> | 3.1   | 51.2  |
| Purchased in Last 6 months <small>(Of Respondents Using)</small>          | 43.1%   | 56.3%   |
| Repurchase Cycle <small>(years)</small>                                   | 1.1   | 0.6   |
| <b>Contact Lenses Usage</b>   | 14.2%   | 16.4%   |
| Approximate Users <small>(Millions of people)</small>                     | 3.8   | 40.5  |
| Purchased in Last 6 months <small>(Of Respondents Using)</small>          | 48.7%   | 51.4%   |
| Repurchase Cycle <small>(years)</small>                                   | 1.0   | 1.0   |
| <b>Contact Channel Sales</b> <small>(by people)</small>                   |   |   |
| Physical Retail Location  | 75.3%   | 71.2%   |
| Internet  | 19.7%   | 18.0%   |
| Telephone   | 2.7%  | 2.6%  |
| Other/Unsure  | 2.3%  | 8.2%  |

# Refractive Surgery



CA




US

|  | CA    | US    |
|--|-------|-------|
| <b>Had Refractive Surgery</b> <small>(At any time)</small>             | 3.8%  | 4.0%  |
| LASIK / Laser  | 25.7% | 35.9% |
| Custom Lasik   | 5.6%  | 5.9%  |
| PRK (Photo Keratectomy)  | 4.6%  | 5.3%  |
| INTACTS (Corneal Rings)  | 4.7%  | 4.5%  |
| <small>(Of Surgery Patients, based on their best recollection)</small> |       |       |
| <b>Premium IOL (Intra Ocular)</b>                                      | 9.4%  | 7.9%  |
| <b>Had Surgery within Past Six Months</b>                              | 7.5%  | 4.8%  |
| <b>Very Aware of Surgery Procedures</b>                                | 12.9% | 24.1% |

(Of Non-Surgery Patients)

# Demographic Comparisons

|  Canada (CA) | Total  | Male   | Female | 18-34  | 35-44  | 45-54  | 55+    |
|---|--------|--------|--------|--------|--------|--------|--------|
| <b>Uses any form of Vision Correction</b>   | 74.1%  | 70.4%  | 77.5%  | 58.3%  | 62.5%  | 78.2%  | 88.4%  |
| Prescription Eyeglasses   | 65.3%  | 61.2%  | 69.1%  | 52.6%  | 56.6%  | 66.6%  | 77.6%  |
| Contact Lenses  | 14.2%  | 10.0%  | 18.0%  | 21.1%  | 19.2%  | 12.4%  | 7.8%   |
| Reading Glasses (OTC)   | 12.3%  | 11.8%  | 12.7%  | 2.2%   | 4.6%   | 18.8%  | 19.3%  |
| Prescription Sunglasses<br><small>(Wears At All)</small>                                      | 10.1%  | 8.9%   | 11.1%  | 7.3%   | 9.8%   | 10.3%  | 12.0%  |
| <b>Private Vision Insurance Coverage<sup>+</sup></b>  | 20.1%  | 20.6%  | 19.6%  | 19.1%  | 24.2%  | 21.6%  | 18.1%  |
| <b>Eye Exam within Last 6 Months</b>  | 25.9%  | 26.6%  | 25.2%  | 26.3%  | 23.9%  | 23.5%  | 27.7%  |
| <b>Eyeglass Repurchase Cycle (years)</b>  | 2.5    | 2.5    | 2.6    | 2.0    | 2.0    | 2.3    | 3.5    |
| <b>Frame Average Price Paid (CAD)<sup>+</sup></b>   | \$ 192 | \$ 196 | \$ 189 | \$ 183 | \$ 187 | \$ 184 | \$ 210 |
| <b>Lens Average Price Paid (CAD)</b>  | \$ 216 | \$ 226 | \$ 208 | \$ 178 | \$ 189 | \$ 227 | \$ 262 |
| <b>Progressive Lenses (percent of total units)</b>  | 29.4%  | 30.5%  | 28.5%  | 1.6%   | 9.6%   | 32.9%  | 54.0%  |
| <b>Contacts Repurchase Cycle (years)<sup>-</sup></b>  | 1.0    | 0.8    | 1.3    | 1.0    | 1.0    | 1.0    | 1.5    |
| <b>Readers Repurchase Cycle (years)<sup>-</sup></b>   | 1.1    | 1.1    | 1.1    | 1.4    | 0.8    | 1.0    | 1.2    |
| <b>Sunglass Average Price Paid (CAD)</b>  | \$ 61  | \$ 71  | \$ 52  | \$ 63  | \$ 67  | \$ 64  | \$ 49  |
| <b>Sunglass Repurchase Cycle (years)</b>  | 2.0    | 2.1    | 1.9    | 1.4    | 1.6    | 2.1    | 3.3    |

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## Notes and Methodology

- Data in this presentation is subject to periodic revision as proper baselines for market sizing are established; continued feedback in this area is very helpful
- Responses from 1,000 adults in Canada are collected each month (for a total of 12,000 responses annually)
- The incoming samples is structured to represent the Canadian adult population by gender and age
- Responses have also been found to be representative of the population by country region and urban areas
- The survey instrument was translated from English into French with the assistance of industry and in-country experts for French-speaking survey respondents residing in Quebec
- After initial data review and implementation of translation revisions, VisionWatch Canada fully launched in January 2015
- Responses are reviewed for accuracy, weighted by personal demographics and other characteristics before being aggregated to the totals reported
- Canadian dollar equivalencies are based on the average exchange rates during the reported period
- Quarterly updates are freely available to members of The

Vision Council and partnering industry associations

- Information contained within this may not be republished in any form without written consent from The Vision Council

Channel nomenclature has been modified by VuePoint to be consistent with terminology commonly used in the Canadian market

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