

COR Advisory Panel Meeting 10.6.10

The Wait Is Over on Soft Multifocal Lens Success

Old days of the three Rs—refit, refit, refund—are gone

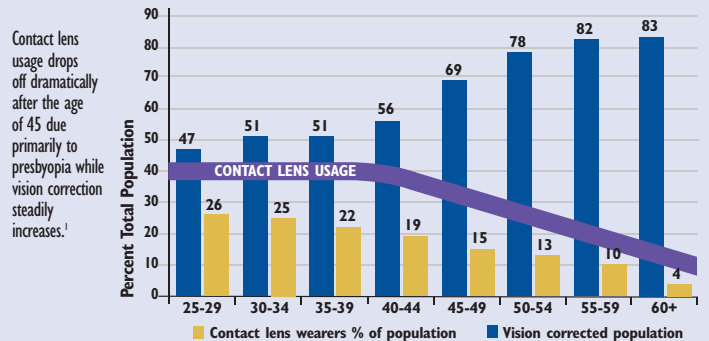
The combination of new and improved soft multifocal contact lenses, along with the historical dropoff in contact lens wear as patients reach their 40s, means that there is tremendous potential for invigorating a contact lens practice through promoting this option, said **Dwight H. Akerman, OD, FFAO, (Dipl)**, director of professional affairs and programs, CIBA VISION®. In fact, the expansion of the market is beginning to appear already. Soft multifocal lens sales grew 21.9 percent in June-July 2010, compared to the same period the year before. That growth is second only to the jump in daily disposable lenses, which grew 41.2 percent



Dr. Akerman

Continued on page 2

Historic Presbyopic Contact Lens Usage



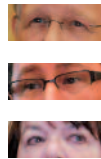
COR Advisory Panel Meeting 10.6.10

COR Meeting Looks at the Big Picture



The COR Professional Advisory Panel Meeting, held twice each year to bring together leaders in corporate optometry and manufacturers, drew nearly 70 attendees to its Las Vegas meeting on Oct. 6, 2010. The overflowing crowd represented various aspects of the ophthalmic field and optometric profession. The COR Professional Advisory Panel Meetings are held in conjunction with Vision Expo. ■

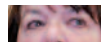
inside COR



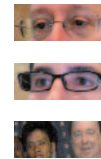
Health Care Reform Impact . 2



Multicultural Awareness . . . 3



Eye Exam Numbers Rising . . 4



Smart Marketing 9



Calculate the Value 11



Charitable Efforts 12

Expanded Parameters for Toric Lens

AIR OPTIX® for ASTIGMATISM contact lenses are now available in expanded parameters

AIR OPTIX® for ASTIGMATISM contact lenses are now available in one of the widest in-stock parameter ranges of any silicone hydrogel toric lens, resulting in increased patient coverage from 88 percent to 99 percent.[†]

These lenses combine the breakthrough Precision Balance 8|4™ design with a highly breathable silicone hydrogel material, resulting in a healthy, comfortable contact lens option that provides consistent performance and crisp, clear vision. They are approved for daily wear and up to six nights of extended wear and are recommended for monthly replacement.

AIR OPTIX® for ASTIGMATISM lenses are

made of lotrafilcon B and have a Dk/t of 108 @ -3.00D, -1.25D x 180. They are available from +6.00D to -6.00D in 0.25D steps, with cylinder powers of -0.75D, -1.25D, -1.75D and -2.25D, and from -6.50D to -10.00D in 0.50D steps in -0.75D, -1.25D, -1.75D and -2.25D cylinder powers. They are available in axes around the clock in 10° steps, have a diameter of 14.5 mm and a base curve of 8.7 mm, and feature a blue visibility handling tint. ■

[†] Among astigmatic patients with 0.75D to 2.75D cylinder. 1. Based on the prevalence of refractive errors presenting to U.S. ODs surveyed in 1999 and calculation of residual astigmatism (of ≤ 0.62D); CIBA VISION data on file, 2009

Health Care Reform Presents Opportunity and Challenge

The implementation of health care reform is both optometry's greatest opportunity as well as its greatest challenge, said **Ronald L. Hopping, OD, MPH, FAAO**, American Optometric Association (AOA) vice president. His presentation, *Health Care Reform: The Game-Changer for Optometry*, opened with an accounting of the AOA's impressive gains of the past few years.

Key among them is the passage of the Harkin Amendment, which establishes the first federal standard of provider nondiscrimination that would apply to all health benefit plans, including self-insured ERISA plans. The battle isn't over yet, though, warned Dr. Hopping, as the American Medical Association seems determined to lobby for the amendment's repeal.

Other legislative victories include the designation of children's vision care as an essential health benefit for plans operating within new

state-based health insurance exchanges. Although the health care reform legislation will undergo changes, it currently requires no disruption of existing coverage, including stand-alone vision plans, and places a new emphasis on the preferred "health care home" model of patient-centered care. Semantics are important here, as the exclusionary term "medical home" did not survive the legislative process, he said.

The legislation includes an exemption for eyeglasses and contact lenses from a new 2.3 percent medical device excise tax, as well as an exemption of the cost of vision

benefits from the calculation of a new excise tax on high-cost, so called "Cadillac" health plans.

Now that many of optometry's interests have been addressed in the health reform package, the challenge remains to maintain these successes in the development of 50 state-based health insurance exchanges. "State insurance commissioners will be key figures in developing exchanges and active in the implementation process," he said. "Optometry must be as engaged in every aspect of the health care reform implementation process as we were in the legislative process." ■



Dr. Hopping



Corporate Optometry Reports is a quarterly publication produced and owned by CIBA VISION® Corporation.

COR Advisory Panel



Mike Akahoshi
Target Optical
makahosh@luxotticaretail.com



Mark E. Lynn, OD
Dr. Mark Lynn & Associates PLLC
DrMarkLynn@DrMarkLynn.com



Bob Stein
National Vision Inc.
bob.stein@nationalvision.com



Dwight H. Akerman, OD, FAAO
CIBA VISION®
dwight.akerman@cibavision.com



Denise Mogil
Costco
dmogil@costco.com



Rodney L. Tahrán, OD, FAAO
Essilor U.S.A. Inc.
rtahrán@essilorusa.com



Thomas E. Bobka, OD
Shopko Stores, Inc.
tbobka@shopko.com



Priti Patel, OD
FirstSight Vision Services
priti.patel@firstsightvision.net



Russ Tolar
eyecarecenter
rtolar@eyecarecenter.com



Eliot Grossman, OD
EYEXAM of CA
egrossma@luxotticaretail.com



Sybil Richard, RPH, JD
Walmart
sybil.richard@wal-mart.com



Lyn Vaclavik
US Vision
lvaclavik@usvision.com



Mark Jacquot, OD
Pearle
mjacquot@luxotticaretail.com



Florian Safner, OD
LensCrafters
fsafner@luxotticaretail.com



Joseph Wende, OD
Davis Vision
jwende@davisvision.com



Glenn Kawaguchi, O.D.
Sears
gkawaguc@luxotticaretail.com



Nicholas Shashati, OD
Sterling VisionCare
nick.shashati@sterlingoptical.com



Ed Zajac
Alcon Laboratories
ed.zajac@alconlabs.com



Alex Louw
Transitions Optical
alouw@transitions.com



Jeff Smith, OD, MBA
Highmark
jsmith@ecca.com

Marjolijn Bijlefeld, Managing Editor
mbijlefeld@jobson.com

Maggie Biunno, Assistant Editor
mbiunno@jobson.com

Supporting Sponsors



© 2010 Novartis AG

CIBA VISION® • 11460 Johns Creek Parkway, Duluth, GA 30097
corporateod.com

Wait Is Over...

Continued from page 1

over the same time period.

The opportunity for multifocal silicone hydrogel lenses is immense. There are about 23 million Americans in the 45-49-year-old age group and another 22 million in the 50-54-year-old range. Dr. Akerman reviewed the results of several recent subjective and objective studies that showed that more patients prefer the bifocal vision of multifocal soft contact lenses to monovision.

Dr. Akerman encouraged practitioners and corporations to embrace the new lenses. "New silicone hydrogel multifocal lenses are greatly improved over previous designs," he said. "Patient loyalty and practice profitability await those who proactively adopt these new silicone hydrogel multifocal contact lenses." ■

Corporate Pulse

Be a part of the COR polls.
Visit CorporateOD.com
regularly to participate in
new polling questions.

Transitions Optical Helps Practitioners Build Multicultural Practices

About three years ago, Transitions Optical began its multicultural initiative with a focus on the Hispanic population. The need seemed apparent, as U.S. Census data showed that Hispanics made up the largest and fastest-growing minority group, said **Manuel Solis**, multicultural marketing manager at Transitions.

Through research and focus groups, a Transitions team confirmed this group was at higher risk for several health issues (see story at right), but language barriers and other obstacles to care existed. As the Hispanic population increases, so does its purchasing power, which is projected to be about \$1 trillion by 2013.

To help eye care professionals build relationships with culturally diverse groups, Transitions has developed several materials. These include a consensus paper on the topic and bilingual educational materials for use by opticians. Called *Dispensing to Your Hispanic Patients*, the bilingual course addresses cultural sensitivity issues and provides ideas on



Manuel Solis

how to communicate with patients, particularly in identifying the benefits of products such as Transitions® lenses. For example, “hearing how to explain how photochromics work in Spanish makes it easier to repeat the concepts in Spanish to patients,” he said.

Transitions has developed bilingual pocket cards that translate common optical terms and a bilingual eye care guide series that helps explain key exam tests. The



Transitions Optical provides bilingual educational material.

Eye Care Communication Guide, intended for the entire staff, includes explanations of every step in the eye care appointment process. The largest partnership that Transitions has entered into has been with the American Optometric Association to form the Hispanic Vision Initiative.

Now Transitions is taking the multicultural approach even further. In March, the company launched a Diversity Advisory Board, and materials are being developed as well for African American and Asian American demographic groups. ■

Health Factors in the Hispanic Population

Hispanics are at higher risk for certain overall health issues, which could have implications for vision.

- ◆ Diabetes affects 10 percent of Hispanics in the U.S., three times higher than the rate in the general population. The vast majority, 95 percent, have type 2 diabetes.

- ◆ Hypertension affects 29 percent of Hispanics and can lead to complications such as hypertensive retinopathy over time.

- ◆ Cataract is the leading cause of visual impairment among Hispanics—affecting one in five Hispanic adults. While the risk of developing cataract increases with age, one major risk factor is cumulative exposure to UV rays.

- ◆ About 10 percent of the Hispanic population is considered at risk for developing advanced forms of age-related macular degeneration.



Implications for Care

Because people with diabetes are more susceptible to heightened damage from UV radiation and can experience reduced contrast sensitivity and increased susceptibility to glare, the proper eyewear should be recommended.

Medications used to treat hypertension can lead to an increased susceptibility to UV and glare.

“UV radiation is a common risk factor in developing—or exacerbating—almost all of these conditions,” **Manuel Solis** said. “This reinforces the importance of recommending UV-blocking eyewear to all patients. If a patient is experiencing sensitivity to light or glare, you may want to recommend a photochromic lens with an antireflective coating.

These lenses adjust to changing lighting conditions outdoors for added visual comfort, while reducing glare and blocking harmful UV rays.” ■



Economy Hits Eyewear Sales but Eye Exams on the Rise

Consumers are still feeling the slam of a down economy after nearly 24 months of impact, said **Marge Axelrad**, SVP, editorial director, *Vision Monday*. In her presentation, *A Snapshot of U.S. Optical Market 2010*, she explained that consumers are reassessing where their money is spent, as well as the value of products and services that they choose.

However, despite the economic uncertainty, the number of adults receiving eye exams is on the rise. For the 12-month period ending June 2010, 43.6 percent of adults received an eye exam, in comparison to 43.5 percent for the

same period one year earlier, and 42.8 percent for the same period two years earlier, according to VisionWatch, an ongoing, consumer study conducted by Jobson/Vision Council. When asked where consumers had their latest eye exam, the number of responders who said they chose an independent practitioner is also increasing. Only 33 percent said they had an eye exam for vision correction in the last six months at a corporate location, while 67 percent said they went to an independent doctor, for the 12-month period ending June 2010.



Marge Axelrad

The number of frame market dollars and contact lens market dollars decreased slightly, by 3.1 percent and 1 percent respectively, for the 12-month period ending June 2010.

How can eye care practitioners and optical corporations react? Axelrad suggested that patient education is key. "Reinforce the importance of eye health care exams and

Tracking the Economy

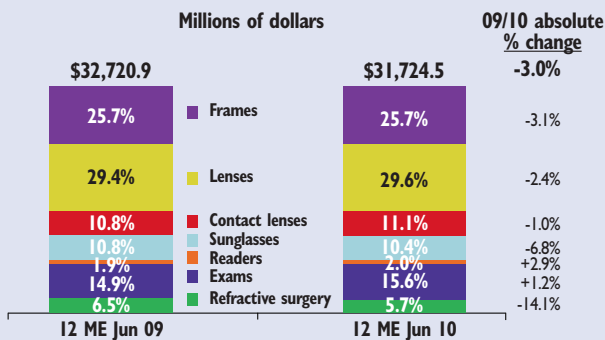
There are several barometers to gauge consumer and business views of the economy.

◆ **General Consumer Sentiments**—The Consumer Confidence Index from the Conference Board updates its numbers monthly, based on a 5,000-household sample. See the monthly press releases, issued on the last Tuesday of each month, at conference-board.org.

◆ **Optical Business Barometer (OBB)**—The Jobson Optical Research OBB is a monthly survey of a representative sample of independent optical retailers (single locations and groups of no more than three locations). The OBB is based on a scale of 1 to 5, where 5 is most positive. The OBB, which had crept up an index of 3.7 in August 2010, matching highs from earlier in the year, dropped to 3.3 in September and 3.2 in October. The OBB, which started reporting monthly index scores this year, posts its new findings on visionmonday.com. ■

eyewear that meets the needs of consumers' lifestyles. Consider adjusting your mix of products, creating value-driven sales and using new marketing techniques, such as social media. With a new focus, ODs are more likely to drive consumers' decisions about eye care and eyewear," she said. ■

Total Vision Care Market in the U.S.

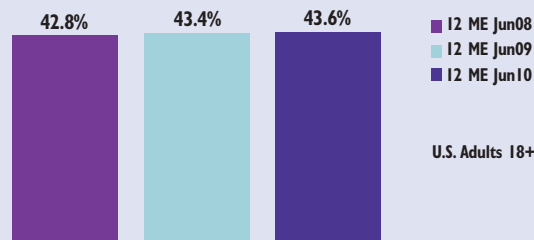


*Total Vision Care Market includes dollars spent at all retail types at any retail location on the sale of either spectacle lenses, frames, contact lenses, sunglasses (plano and Rx) or OTC readers, or revenue earned from refractive surgery or eye examinations. This number does not include sunglasses clips and reflects the dollars spent only by those U.S. residents 18 and older. Does not include retail dollars spent by/for contact lenses and exams for those 17 years of age and younger.

Source: VisionWatch

Eye Exams

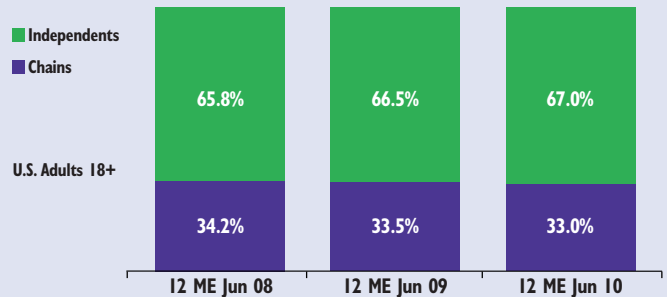
Percentage of adults actually having an eye exam



Source: VisionWatch

Eye Exam Location

Based on all who had an exam within the last six months for vision correction



Source: VisionWatch

Public Health Campaign on Eye Health Makes an Imprint

Stephanie Campbell, MPH, managing director for the Foundation for Eye Health Awareness, wants people across the country thinking about their eyes. And for the past few months, her foundation has been acting as the messenger for the Think About Your Eyes (TAYE) campaign. Campbell explained the success of TAYE and the importance of this message in her presentation, *Advancing Vision in Health*.

About 61 million Americans are at risk for serious vision loss, but only half of these individuals had an eye exam in the past year, Campbell said. The numbers demonstrate the need for this education. Twenty-three million



The nonprofit, educational foundation's mission is to increase public awareness about the importance of eye care through a nationwide messaging campaign that directs people to take better care of their eyes.

Through TAYE, the foundation builds consumer awareness, which increases interest in exams and engages ECPs by stressing the importance of yearly complete eye exams, Campbell says.

As a result of TAYE's regional advertising in nine markets across the U.S. focused on eye disease, kids' vision and visual fatigue, its internal survey results show that the education is having a positive effect. The TAYE team has been busy making 213 million total impressions through TV, radio, social media, industry events, professional outreach and public relations such as the flash mob of dancing eyeballs in Times Square.



Stephanie Campbell

Looking to the future, Campbell explained that upcoming advertisements will focus on the connection between eye health and overall health. "Good visual health is important to avoid other health complications," Campbell said. The foundation will focus on four key health messages including diabetes, heart attack, cardiovascular health and overall health. Visit thinkaboutyoureyes.com for more information. ■



The TAYE web site is attracting public attention.

Americans have suboptimally corrected refractive error; 11 million Americans have an uncorrected refractive error; and more than 100 million Americans suffer from life-threatening conditions that could be detected early from a comprehensive eye exam, she said.

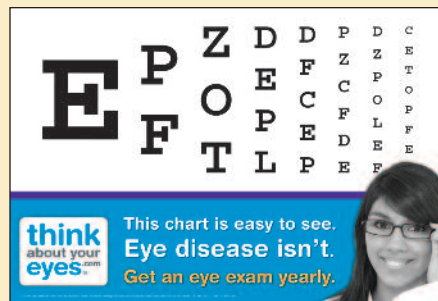
While there have been existing resources for eye health care education, they weren't enough. That's why co-sponsors Essilor, Luxottica and VSP launched TAYE. "Several companies and organizations were promoting the importance of proper vision care and attempting to increase awareness regarding specific vision issues through a variety of means, but all with different messages," Campbell said. Consumers were receiving mixed messages from eye care professionals, retailers, manufacturers, pharmaceutical companies, insurance providers, government and other parties.

The Foundation for Eye Health Awareness, formed as a result of the 2009 Eye Health Summit, aims to clear up this confusion.

Think about Your Eyes' Educational Plan

Through a variety of marketing tools, the Think About Your Eyes educational plan focuses on four aspects to move consumers from knowledge to action.

- ◆ **Relevance:** Develop persuasive, relevant message in an integrated, executable plan.
- ◆ **Awareness:** After repeated exposure, a message is noticed and recalled.
- ◆ **Attitude:** Contemplation leads to internalizing message and intent.
- ◆ **Action:** Target goes online or calls an eye doctor for an appointment. ■



The Think About Your Eyes campaign web site offers a variety of marketing materials for eye care professionals, including post-cards, dispensing mats, advertising materials and an email signature to use in professional communication with patients and colleagues.

OD Talks to Patients about Their Lifetime in Contact Lenses

Daily disposable lenses provide an excellent introduction to contact lens wear

Eric Bailey, OD, affiliated with a Target Optical in Monticello, Minn., believes that there is no wrong age to be introduced to contact lens wear. With the range of contact lens products today, nearly everyone in every stage of life is a candidate. And when he fits one patient in contact lenses, whether that's a preadolescent or a presbyope, he expects he'll gain additional contact lens fits from other members of that family.



Dr. Bailey

A discussion on DAILIES® AquaComfort Plus® lenses from CIBA VISION® has served as a springboard for a much larger discussion on contact lenses. Dr. Bailey described a typical interaction that occurs routinely in his practice.

"A mom comes in with her 11-year-old, and I talk about contact lenses. The mother says, 'I don't know if she can keep them clean, and I don't want the hassle of doing that myself.' That's my opportunity to re-educate the mother," he said. So Dr. Bailey describes the advances in contact lenses, noting that DAILIES® brand lenses are designed to be disposed of every evening and a fresh pair inserted every day that the child wants to wear contact lenses.

Many times, parents of these preadolescents and adolescents are former contact lens wearers. They may have dropped out because of the

inconvenience or discomfort of older contact lenses, and they haven't kept up with what's new.

That's another reason Dr. Bailey focuses his conversation on a lifetime of contact lens wear. Parents who initially see the advantage of contact lenses for their child begin to realize that they can reap the same benefits.

"I'll tell the young patient that this is his or her first adult-type decision," he said. "This is just the beginning of a lifetime of contact lens wear. I am going to fit you with these daily disposable lenses now, and as you get older, you will have more options. When you're in college, you might want to be able to wear lenses longer and even sleep in them. You may still want to keep some of these DAILIES® brand lenses around for when you're doing sports or camping." He explains that he has options for people who have astigmatism and as they get older. He then addresses the parent to talk about multifocal contact lenses. "My parents are in their 70s, and they are both wearing the AIR OPTIX® MULTIFOCAL monthly replacement lenses," he tells them.

"When I fit a child in DAILIES® brand lenses,

about 70 percent of the time, I end up capturing at least one parent, too," Dr. Bailey said. By having mentioned the full range of contact lens options, the parents in the exam room begin to visualize themselves and others in the family who might fit into one of these categories.

Resetting the Parental Clock

"So many of these parents are still stuck in the 80s. They don't realize how far contact lenses have come," Dr. Bailey said. So one way he engages patients or parents is to ask when they wore contact lenses. If the answer is that they were in high school or college, he'll say something like, "Oh, you were listening to REO Speedwagon or Styx, and contact lenses came in a vial." They laugh because they recognize how much everything else has changed since then.

Similarly, he doesn't have to look far to bring cost benefits into the practice. "We have a Starbucks inside our SuperTarget," he said, and it's not unusual that a parent has a Starbucks cup in hand while the child is having the exam. "Some practitioners are uncomfortable talking about the dollars, but I believe that astute practitioners should acknowledge and ed-

ucate parents and patients to the costs. Practitioners have to speak to the cost benefits in the lane. So I might say something like, "For the same price as that \$5 latte, you can get about 10 days' worth of contact lens wear for your child." The effect is immediate, he said, as parents reconsider what they thought was going to be prohibitively expensive.

Lenses for a Lifetime

CIBA VISION® has a broad range of contact lenses, and by re-educating his adult population, Dr. Bailey

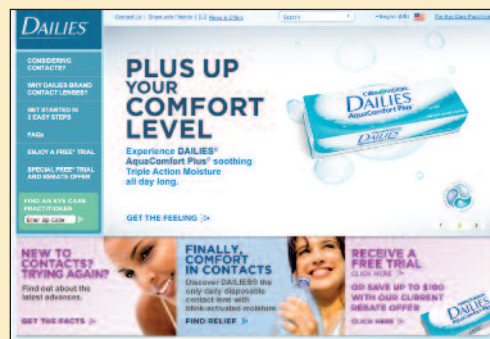


Talking Points: Quench Thirsty Eyes with DAILIES® Brand Lenses

Only DAILIES® brand contact lenses moisturize with every blink.

◆ The advanced comfort technology in a daily disposable contact lens comes from a unique triple-action moisture system that lubricates in the morning and moisturizes and refreshes all day. Exclusive DAILIES® blink-activated moisture is released from inside the lens with every blink—all 14,000 of them per day.

◆ You can put on a fresh, new pair every day—wear them once and toss them at night. There's no cleaning or disinfecting and no worry about deposit buildup over time. ■



Web site encourages consumers to try DAILIES® brand contact lenses.

Talking Points: TriComfort™ Technology Brings Natural Feeling

The TriComfort™ Technology in the AIR OPTIX® family of contact lenses helps lenses stay comfortable in three important ways.

◆ **Breathability**—Rich, nourishing oxygen flows continuously through AIR OPTIX® brand contact lenses, contributing to a healthy, natural feeling.

◆ **Retains Moisture**—The materials of AIR OPTIX® brand contact lenses help retain moisture, which helps prevent the lenses from drying out, so lenses feel comfortable all day long.

◆ **Resists Deposits**—AIR OPTIX® brand contact lenses feature an ultra-smooth surface designed to resist deposits for comfortable wear all day long—every day, even for up to one month. ■



AIR OPTIX® lens web site reinforces benefits of new technology.

finds he is able to introduce contact lens wear to patients at any age.

Preadolescent children through adults: For many first-time contact lens wearers, and especially for children and teens, Dr. Bailey prescribes DAILIES® brand lenses. He is comfortable prescribing this lens to children as young as 10. "It's a healthy option, and parents feel comfortable with it."

Adults with extended wear needs: Dr. Bailey prescribes AIR OPTIX® brand silicone hydrogel lenses for patients who wear

presbyopia with three ADD powers, he said.

Over the years, Dr. Bailey has moved most of his patients away from two-week lenses. "Here in the upper Midwest, people are frugal. Two-week lens wearers tell me they stretch their lens wear, so I say I'm converting them to a one-month lens and will monitor their eyes for adverse signs," he said. He brings up the price, making sure to divide the price, minus any annual supply promotions and rebates, by 365 to break it down to a daily price. "Your vision is worth more than the 50 cents you pay



lenses for long hours or want the extended wear option. "The TriComfort™ Technology provides a combination of the breathable material and moisture retention that has been noticeable to my patients," he said. He asks all his contact lens patients during their annual exam how the contact lenses have performed. He wants to uncover problems, discomforts or inconveniences that might prompt him to change the lenses. "One thing I hear from my AIR OPTIX® brand lens wearers is that these lenses live up to their marketing. These patients tell me they have fewer problems of blurry vision at night," he said.

Presbyopes: AIR OPTIX® MULTIFOCAL lenses carry patients from early through advanced

for the local paper every day," he says. Yet it costs less.

"The CIBA VISION® family of lenses offers me the best combination of handling characteristics for my younger and adult patients. For a successful contact lens practice, it's critical to have a lens that is comfortable to insert and remove," Dr. Bailey said. He wants that initial patient reaction to be a good one.

"The monthly replacement lens is where we see a meeting of common sense, economic pressures and industry shift," he said. Daily disposable lenses have been gaining in his practice lately, too, as he has discovered their effectiveness in bringing more family members into contact lenses. ■

"This is just the beginning of a lifetime of contact lens wear. I am going to fit you with these daily disposable lenses now, and as you get older, you will have more options," Dr. Bailey tells young patients.

Contact Lens Market Recovering with One-Month and One-Day Lenses Leading the Way

The good news is that the recession is officially over, said **Jeffrey D. Johnson, OD, CFA**, director and senior research analyst at the global investment research firm, Robert W. Baird. But even though the recession was declared over in June 2009, there are still economic pressures that will make recovery a slow process. Unemployment remains "stubbornly high," he said, and housing prices, housing starts and household debt levels have not seen great rebounds.

The mixed results are evident in the ophthalmic industry as well. The contact lens market

does seem to be recovering after a 2009 fall-off, he said, especially in terms of daily disposable and specialty contact lenses. Dr. Johnson conjectured on some of the factors that might be driving the contact lens market rebound: shorter obsolescence cycles, relatively well-defined spend, new products and more promotions among them.

Industry surveys show an overall improving trend line, with contact lens sales picking up in 2010, especially over the summer and during the back-to-school season in August. There was also an increase in silicone hydrogel contact



Dr. Johnson

lens sales and daily disposable contact lenses, he said.

Another significant factor is the increase in daily and monthly replacement lenses. More than 40 percent of practitioners noted a preference for fitting monthly replacement spherical lenses, while the percentage preferring a two-week spherical lens dropped below 30 percent. Similarly, practitioner preference for monthly toric lenses crept up past 50 percent, while two-week toric lenses were preferred by only about half as many practitioners surveyed.

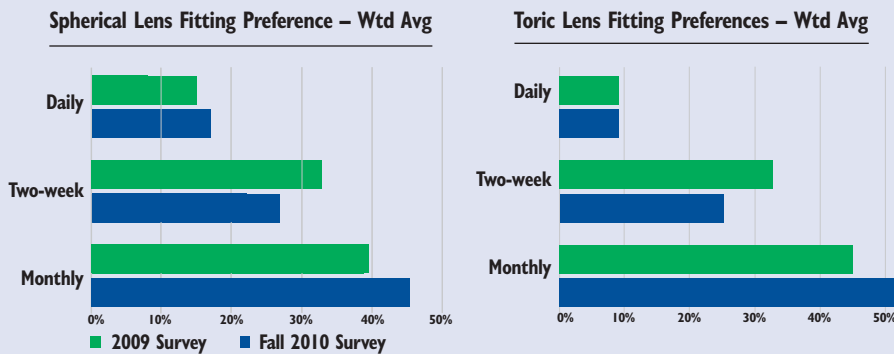
Practitioners surveyed in the fall of 2010 also reported fitting more daily disposable lenses. The primary reason for doing so was better compliance, followed closely by their perception that these wearing schedules represented a healthy option.

Overall, the contact lens market demand is recovering, Dr. Johnson said, worldwide and in the Americas. "Silicone hydrogel conversion continues, especially in the U.S.," he added. "We estimate silicone hydrogel sales to account for about 60 percent of U.S. contact lens revenues in 2010 versus 55 percent in 2009 and 15 percent in 2004." With toric lenses, the silicone hydrogel ramp is even faster, approaching an anticipated 65 percent penetration in 2010.

The industry may be looking at a tipping point for daily disposable lenses, he said. "Currently, we expect daily disposables to continue picking up 1-2 share points each year in the U.S., but new product launches could accelerate this penetration rate," Dr. Johnson said. ■

Monthly and Daily Disposable Lenses Surpassing Two-Week Lenses

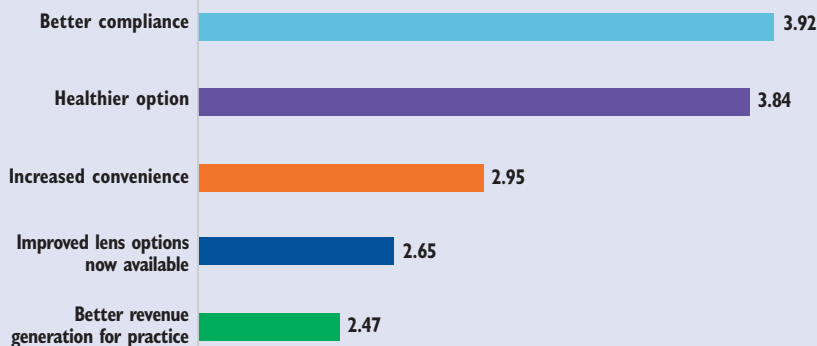
Shift to monthly and daily replacement lenses continues



Source: Robert W. Baird & Co. and allaboutvision.com

Factors in Prescribing Daily and Monthly Soft Contact Lenses

On a scale of 1-5



Source: Robert W. Baird & Co. and allaboutvision.com fall 2010 survey

Develop Marketing Savvy

Shoppers behave in predictable ways, said **Tom Moseman**, senior vice president of EnviroSell, a global research and consulting firm that seeks to understand how people shop. Moseman reviewed some savvy marketing strategies that can help optical locations and ODs better market to their customers in his presentation, *Merchandising Contact Lenses and Eyeglasses to Today's Savvy Shopper*. By integrating operations, space design and merchandising, doctors, corporate location designers and managers can take off their "operational blinders" and redefine their stores so that signage and merchandising leads to desirable shopper behaviors.

For example, Moseman said that there are distinctive differences between a mall or store-within-a-store location, a strip mall location or a freestanding store

location. First, they draw different people. "Malls tend to draw younger people who are more often in groups. The free-standing location shopper trends older and is more often alone," he said. These shoppers have different needs. "Malls have more 'new' people who are not familiar with the store. Strip mall or free-standing stores are destinations. Shoppers are more often mission-centered." Finally, these shoppers display different behaviors. "Customers at malls browse more,



Tom Moseman

ask more questions and interact with staff more, but they often spend less time in the store. In contrast, customers at free-standing stores are there for a reason, spend more time there, but they often interact with staff less."

Moseman said that in order to be effective, optical merchandising should break away from its traditional monotony. "Create ways to

break up the visual monotony. Think about integration, such as displaying contact lenses within frame areas. Employ smart cross-merchandising, which can lead to add-on sales, not cannibalization."

Moseman also details the zones or different areas of the doctor's office and stores and what goes on in each of these areas. How much time does a patient or shopper spend there? What can be done to engage the patient or shopper in every area? "Nearly all shoppers look at signage," said Moseman. "Signage should encourage the shopper to 'kick the tires.'" He also advised looking at the entire space and merchandising all traffic patterns, not just the paths from the front to the back of the store.

Merchandising is not just for shoppers. It can help staff as well, he emphasized. "Effective merchandising is a sales tool to help educate the shopper, and it's a self-help tool that can engage the shopper when the staff isn't available." Even the process of merchandising serves to educate staff members in their downtime, he said.

Make Signage Work for You

Get rid of the clutter. Beyond that inviolable rule, there are other ways to make signage more effective, said **Tom Moseman** of EnviroSell.

- ◆ **Consider location and positioning:** Locate signage near the shopping hot spots. "Remember, one effective location will reach more shoppers than many ill-placed pieces," he said.
- ◆ **Think about content:** Follow these four rules. Keep it simple, keep it direct, keep it obvious and have fun.
- ◆ **Use unique shapes and colors:** Think beyond rectangular designs, he said.
- ◆ **Incorporate lifestyle images and movement:** "Holographic effects and simple movement attract the shopper's eye." ■

CIBA VISION® Relaunches Web Site

Backed by months of research to identify practitioner needs and designed to better serve their interests, mycibavision.com brings all of the CIBA VISION® web-based services and sites together through one portal. Information is organized on a "dashboard" that provides time-saving functionality, robust content and value. This streamlined portal facilitates ease of access to online ordering as well as information about CIBA VISION® products and educational offerings.

Content on mycibavision.com now falls under four primary categories.

- ◆ The *Products* section leads to more in-depth information about its product portfolio.
- ◆ The *Ordering* sidebar provides direct access to all of the familiar lens ordering systems.
- ◆ The *Education* section leads to the CIBA VISION ACADEMY FOR EYECARE EXCELLENCE™ (AECE), which continues to serve education needs through all stages of a practice and provides relevant resources for both ODs and staff.
- ◆ The *Business Management* option also connects to the AECE and its proprietary tools that help to increase practice profitability and patient retention. ■



New web site serves as a streamlined portal to CIBA VISION® information.

Where Will the Next ODs Come From?

Each year, about 870 ODs retire. Meanwhile, new job openings are created for another 835 ODs. The problem is that the roughly 1,200 graduates from optometry school aren't enough to fill those 1,705 positions, said **Bill Valdespino**, of Local Eye Site, an online eye care recruitment community. Valdespino called his presentation *The Perfect Storm: Meeting the Staffing Challenge*.

This year, the percentage of Millennials or Gen Y workers is drawing near to the percentage of Baby Boomers. In five years, and even more resoundingly in 10 years, the Gen Y workers will be the dominant demographic in the workplace, topping more than 50 percent. Recruitment efforts need to be directed to the places where Gen Y workers can be found. And that's online, Valdespino said.

In February 2010, for example, 17.8 billion job searches were conducted on the top five search engines. In other words, the old paradigm of advertising through a few channels no longer works.

For example, Local Eye Site conducted a 60-day case study with a large corporate optometric company for about 100 position postings. The Local Eye Site email blast, which delivered emails to more than 8,000 eye care professionals, resulted in 490 candidates. In addition, the multi-channel effort, which included eye care career portals, job aggregators, Twitter postings and a banner ad on the Local Eye Site home page, resulted in more



Local Eye Site founder Brad McCorkle and Bill Valdespino staff the company's booth at Vision Expo West.

than 240 potential candidate views per day of the case study. ■

CORPORATE NEWS UPDATE

Charities and Accolades

National Vision, parent of **America's Best Contacts & Eyeglasses** and other retail brands, is kicking off a new not-for-profit foundation called Frames for the World as a spinoff of the company's previous philanthropic efforts. Reade Fahs, president and chief executive officer of National Vision, said the foundation was established to fill the need for low-cost, good-quality frames in optical clinics and eye hospitals in poor and developing countries.

More than 1,000 Vancouver schoolchildren were helped by OneSight Vision Van volunteers in November, thanks to the support of **LensCrafters**. This marked the first time in five years that a Vision Van has made the trip to Canada. OneSight is a Luxottica Group foundation, a family of charitable vision care programs dedicated to improving vision through outreach, research and education.

Consumer Reports magazine announced that **Costco Optical** topped its list of eyewear retailers in a ranking of optical corporations, independent practitioners and online eyewear sources by the publication's readers, based on their experiences. Costco Optical earned the highest score for overall satisfaction among corporate locations, also beating out most of its competitors for price. ■

Online Education Program Expands with New Offerings

The CIBA VISION® ACADEMY FOR EYECARE EXCELLENCE™ has expanded the reach of its highly-regarded professional education programs with 16 new online learning modules.

The modules cover advanced as well as basic topics ranging from multifocal soft lens fitting to ocular anatomy. Selected modules are designated for the eye care practitioner (ECP), and others are designed for staff members. This innovative education tool is specifically designed to accommodate ECP and staff requests for flexible learning when and where it's



**ACADEMY
FOR EYECARE
EXCELLENCE™**
CIBAVISION

most convenient for them. Each learning module takes approximately 40 minutes to complete, although the user may pause the

program at any time. After an online test score is complete, the user can print out a certificate of completion.

Dwight Akerman, OD, FAAO, (Dipl), director of professional affairs and programs, CIBA VISION® North America, said, "Many ECPs have made these e-learning modules the cornerstone of their non-CE education as well as staff training activities."

Over the next few months, more clinical content will be added to include modules that cover corneal staining, contact lens induced dry eye and lens care. Additional business and management content will also be added and include patient communication strategies, business simulation exercises and guidance on how to maintain patient loyalty.

For more information on the CIBA VISION ACADEMY FOR EYECARE EXCELLENCE e-learning modules, visit cibavisionacademy.com/us. ■

Charity as a Way of Life

For **Michael Siebert, OD**, working on mission trips brings a new dimension to his life and work. He has been on about 20 mission trips, most of them with the Luxottica Group foundation, OneSight. Through the photographs he takes there, he is able to bring some sense of the passion for the work and the people back to his patients and communities.

Earlier this fall, Dr. Siebert went to Burkina Faso in West Africa for a four-day clinic. "We averaged seeing about 1,500 patients a day, with about 1,800 on the busiest. OneSight has a very systematic, impressive program," he said. People who need extra care are diverted to different stations to keep the flow going.

Dr. Siebert works as an associate with



Dr. Siebert was prepared for the OneSight trip to Burkina Faso.

Joseph Hopkins, OD, in a LensCrafters-affiliated office in Anderson, S.C. "I've been here for 18 months," he said, and the schedule has allowed him to pursue the

mission work. He is currently working on obtaining his Australian optometric license so he can help OneSight with its outreach in Australia. He is also planning on working long-term in Ghana at a year-round clinic there. Once he accomplishes that, he'll have lived on

every continent except Antarctica.

Dr. Siebert, an avid photographer, takes his camera along on all his trips. He shoots photos and creates videos that he posts on his website, drmichaelsiebert.com. When he worked in a Miami practice before joining Dr. Hopkins, he



The team saw about 1,500 people a day in the West African nation.

played the DVDs in the reception area. As a result of seeing these, patients donated their used eyewear and asked how else they could help. Now he and his general manager are selecting some photos from mission trips to put up in the hallways of their freestanding location.

"I've been on trips with a number of other groups, but I haven't seen anyone top the efficiency of OneSight. The organizers are always listening and improving the system. They're constantly striving to make it better quality and more effective clinics," he said. "I enjoy working with them." ■

COR Advisory Panel Meeting 10.6.10

The True Cost of Contact Lens Dropouts

John Rumpakis, OD, MBA, has done some groundbreaking work to pinpoint more accurately the true dropout rate among contact lens wearers. His ongoing research shows that the dropout rate is significantly higher than the 10 percent generally assumed, actually as high as nearly 16 percent. With the reported averages among the U.S. practitioners who supplied data, the mean eye exam fee was \$101, with a total of \$275 per year in revenue for each contact lens patient. The calculated mean lifetime value of a contact lens wearer was \$37,646.

The point Dr. Rumpakis made during his presentation, *The True Cost of Contact Lens Dropouts*, was that practitioners could reverse this trend if they paid greater attention to those patients at risk for dropping out. The top reason patients in the U.S. dropped out of contact lens wear was comfort/fit issues, cited by 50 percent. Only two other factors reached double-digit figures. Nearly 16 percent said they achieved poorer vision than with eyeglasses, and just more than 12 percent said cost was a factor.

With advances in contact lens materials and designs, as well as proper attention and education given to cleaning and the need for compliance, comfort issues often can be resolved before patients arrive at the verge of dropping out. "If practitioners don't pay attention to prescribing contact lenses and contact lens solutions correctly on the initial patient contact encounter, those doctors risk losing the patient," he said.

Dr. Rumpakis's study was published in the January issue of *Review of Optometry*, and an updated study incorporating more data is expected to be published in 2011. He encouraged practitioners and corporate leaders to consider a contact lens patient's entire value to

the practice and the optical division. For example, contact lens patients, according to his data, typically return to the practice every 18 months compared to eyeglasses-only patients, whose return interval stretches to about every 28 months. "Contact lens patients help to support the optical dispensary for both prescription and nonprescription products and the doctor's office for additional medical services," he said.

As such, it's important to pay attention to those contact lens wearers who are at risk of dropping out. Complaints of contact lens-related discomfort should be heeded as a warning sign. "Contact lens dropouts are not obvious in most practices; they just tend to fade away," he said. "Letting them go without trying to reverse the trend exposes the doctor and the corporation to opportunity costs." ■



Dr. Rumpakis

Act Locally, Act Globally

Neighborhood doctor also serves halfway around the world

For 30 years of his optometric career, **James Weyrich, OD**, owned an independent practice and provided free eye care around the world on mission trips. But after a trip to the Philippines in 1999, his outlook changed. "I knew that the Mercy Ships wouldn't go back there for many years, but I wanted to follow up and check in our glaucoma patients every six months," Dr. Weyrich said. He also met his future wife, **Ellen**, while in the Philippines. The two of them decided that instead of going from country to country, they would dedicate their time to the Philippines.

Dr. Weyrich sold his practice around this time to retire to take care of sick father. But when he passed away in 2001, Dr. Weyrich picked up a full-time position in a Walmart store, while simultaneously starting his own organization, known today as the non-profit international public foundation EyeCare WeCare. "I'm thankful I have the flexibility to

do this," Dr. Weyrich said, who works with his wife in his Aberdeen, Wash., practice. "The thing I like about Walmart is that I can focus on what I'm really trained to do, which is provide primary eye health care." He doesn't feel the stress of handling multiple staff members or with the business responsibilities of managing an optical, and he can devote that extra time back to his foundation.



Dr. Weyrich, at center, poses with ferry boat crew and team members.



Volunteers were on their way to Manila.



At the ferry boat dock, volunteers waited to start a 22-hour ride to Macabebe.

And the store and community are supportive of his efforts. Patients donate old eyeglasses, and over the years he's received grants and financial contributions from patients and service organizations. The Walmart Health and Wellness Division has donated used equipment such as a Woodlyn phoropter, Topcon slit lamp and a Marco auto lensmeter—all of which Dr. Weyrich used this year on his trips.

However, from its inception in the early 2000s, Dr. Weyrich funded the program all on his own, filling a container with equipment to ship to the Philippines and completing the paperwork to become a nonprofit organization. He then raised enough money to make their first mission trip in



Dr. Weyrich boards the ferry boat.

2005. Now the visits are more routine: Dr. Weyrich's wife arrives first, arranges for volunteers and sets up venues. When he arrives, he hops into his mobile clinic and is on his way.

The EyeCare WeCare Foundation visits the Philippines two times a year for three-week medical vision missions. The foundation's 40-foot mobile vision clinic reaches the 880 inhabited islands. In January of this year, Dr. Weyrich examined and provided eyeglasses to 1,769 indigent residents in poor, rural areas. In May, they took volunteers and the mobile clinic on a 22-hour ferry ride to Macabebe, the province of Pampanga. In five clinic days, they provided 1,411 graded eyeglasses, performed 49 cataract surgeries and dispensed medication for ocular conditions to more than 150 people. Since 2005, the foundation has



Volunteers relaxed on the ferry's bunk beds during a day of travel.

provided more than 13,900 pairs of eyeglasses to indigent Filipino people.

With regular visits, he can monitor conditions instead of wondering what happened to the patients he helped. "Very few people have refrigerators and that makes dispensing some medication challenging," Dr. Weyrich said. But he's found a system that works, leaving them with a supply and sending additional bottles to cover the time between trips.

For more information on the EyeCare WeCare Foundation, visit eyecarewecare.org.