

Capturing THE PRESBYOPIC Opportunity

Leveraging
Contact Lens Innovation
for Practice Success

smartphone

laptop

driving

FEATURING

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Create a Culture of Innovation

By Mark Wright, OD, FCOVD

Professional Editor, Review of Optometric Business



Innovation is vital to the long-term success of any business, and surely an eyecare practice is a business that must be managed well for it to succeed.

As eyecare practitioners (ECPs) are well aware, the world keeps changing. Technology leaps forward. Patient habits and preferences change. Health care reform and managed care protocols require us to upgrade

our processes to provide outstanding care efficiently and affordably. For an eyecare practice to thrive, it must adapt to the challenges of our times.

Fortunately, there are innovative products and services that can help us to meet these challenges—and provide vital growth opportunities within the eyecare practice.

We have before us a growth area that is largely underserved: the swelling number of presbyopic patients, whose vision needs are changing.

Innovation plays a role in how we capture this opportunity. Studies show that companies that embrace innovation and are early adopters of innovative products and services tend to have better business outcomes. Further, it is key that innovative behavior be a team effort, not a top-down directive from manager to employees. Companies that fully incorporate innovation do so by creating “cultures of innovation,” organizations where change is embraced, not avoided.

As I see in the many practices I visit, the biggest hurdle we face in embracing innovative solutions often is in our own minds—in our habits. The powerful habits that help us through each work day also can limit how readily we embrace new or better ways of working. In an eyecare practice, our personal and staff habits can stand in the way of incorporating and prescribing innovative optical products that can improve the lives of our patients.

To succeed with innovative products, we need to exercise innovative thinking in our practices. The process of creating a culture of innovation begins with examining our habits and how they affect our choices and our communications with

patients. We must continually ask ourselves: Are we serving our patients with the best technology available? Once we understand the role of habit, we can begin a process of positive habit change that positions us to fully capture the opportunities that innovative products present.

This special report, created by Review of Optometric Business and sponsored by

Bausch + Lomb, examines a wealth of consumer data that reveals great interest in innovative eyecare products. We also look at ECP studies that provide insights into our habits and suggest ways to capture untapped potential for growth. Further, we look at four eyecare practices that are going through the transformative process described herein—and incorporating new thinking and innovative strategies.

In the end, it is innovative thinking that will help us to best serve our patients, and this includes the growing number of presbyopic patients for whom we can offer new and exciting vision correction options. In that pursuit, our ability to transform our practices into cultures of innovation may be the most critical determinant in our success.

“To succeed with innovative products, we need to exercise innovative thinking in our practices.”

A Culture of Innovation

Serving patient needs in...

PRODUCTS	PROCESSES	CULTURE
Embracing innovative services and products and proactively prescribing them to patients	Incorporating efficient and customer-driven office processes and management techniques	Building and maintaining a practice culture that welcomes change

The Challenge to Innovate

How Habits Can Hold Us Back

Every practice develops a patient service routine over time, a complex set of repeated behaviors, or habits, that control most of the daily work of the eyecare practitioner (ECP) and staff. Habits are largely invisible to the actors involved because habits operate subconsciously. They make work easier and more satisfying, and they reliably produce acceptable results. Habits are essential in every aspect of daily life because they enable tasks to be completed without conscious thought. Habits are truly indispensable.

While habits are necessary and make work easier, they have downsides. Habits become entrenched and resist change. Habits can cause a business to become stuck in the status quo, because when the conditions of daily life change, habits do not automatically evolve to adapt. Some habits do not optimize results because they are not modeled after the “best practices” that other businesses have learned through trial and error. Even worse, some habits are dysfunctional and inhibit growth, even as they provide some psychic reward.

If the culture of a practice is allowed to fall into “complacency,” there is little sense of urgency to fix anything. In that situation, the ECP becomes satisfied with the way things work as long as adequate revenue comes in the door, and the staff is satisfied so long as they are compensated.

Changing a habit requires mental effort, and results are uncertain. As habit change is considered, the perceived discomfort and anxiety that habit change might create can easily outweigh any hoped-for, but uncertain financial gains from instituting a new routine.

ECPs know well that they face challenges from the business environment and may surmise that their office process is sub-optimal. But if a threat or deficiency is not immediately causing a performance shortfall, it’s easy to postpone action to deal with it. So old routines persist.

Successful innovation requires a change in mindset—both by the ECP and the entire staff. Current habits must be consciously examined and evaluated and new routines created to replace sub-optimal or dysfunctional habits.

The good news: Habits can be altered to be positive forces in delivering value to patients. Practices that are true cultures of innovation—when embracing innovative products is a matter of habit—are well positioned to capture growth and flourish.

Begin with Measuring

How Innovative Are We?



The following are topline findings from the Bausch + Lomb Innovation Index, 2015, a specially designed survey tool to measure the level of innovative thinking and behavior in an eyecare practice.

While ECPs generally view innovation as a vital component in the successful management of their practices, findings underscore opportunities where positive habit change can lead to measurable practice growth. The following are four key findings—and the growth opportunities that accompany them.

OPTICAL PRODUCT UPGRADES. About one in four practices refits existing contact lens patients to a new type or brand of contact lens.
OPPORTUNITY: Patients continually hear of technology advances in medicine, information technology and leisure products and services. Patients expect the same level of innovative new products from their eyecare provider—and growth-conscious practices provide it.

MEASURING PATIENT SATISFACTION. Four in ten eyecare practices continuously monitor patient satisfaction.
OPPORTUNITY: Innovative tools allow even small businesses like eyecare practices to measure levels of customer satisfaction and identify areas for improvement—then develop strategies to “Wow!” the patient. Providing innovative optical solutions that improve lives is a powerful means toward that end.

SERVICE IMPROVEMENTS. Twenty four percent of ECPs say they made four or more service improvements during the past 12 months.
OPPORTUNITY: Innovative companies continually improve the “customer experience,” and eyecare practices must constantly upgrade the “patient experience.” Practices that are “patient focused” in processes and office culture build value that helps to keep patients in the practice.

SOCIAL MEDIA. Twenty nine percent of eye care practices are active users of social media.
OPPORTUNITY: All ages engage in social media, and buying decisions are increasingly influenced by online research and user reviews. Eyecare practices that utilize social media as a marketing tool and patient-education device create value-based bonds with their long-term patients.

Changing Habits to Increase Adoption of Soft Multifocal Contact Lenses

In consulting with practices and in working with ECP peer groups, I have observed how habit plays a role in limiting—or in maximizing—the adoption of innovative products and services. This is especially true with multifocal contact lenses. I have visited practices where residual uncertainty about the past performance of multifocal contact lenses is reflected in the communications of ECPs and staff alike, however subtly or subconsciously. In contrast, I see practices where the enthusiasm and confidence in the potentially life-changing

technology of present multifocal contact lens designs is a positive habit with corresponding practice success.

The following are common practice habits, both positive and negative, that affect the adoption of the innovative technology in multifocal contact lenses. Analyze which habits fit your own practice, and where your work lies in creating a culture of innovation.

– Mark Wright, OD, FCOVD

	POSITIVE HABITS	LIMITING HABITS
PRODUCTS	<p>Feature innovation. Patients constantly look to upgrade technology to improve their lives, from their phones to their healthcare, and the same is true in eyecare. In all of your communications, let patients know you are the source of cutting-edge technology that can provide improved visual performance and enhanced comfort.</p> <p>Utilize trial lenses. Demonstrate the benefits of multifocal contact lenses by putting trial lenses on eyes. Convey your confidence in the product. Maintain inventory to fully utilize this tool.</p> <p>Make innovation special. Feature innovative products through special fitting events that create a buzz and word-of-mouth marketing.</p> <p>Make it simple. Formulate a simple, consistent message focused on innovation and benefits, and do role plays with staff to practice it. Highlight comprehensive support associated with fees, and simplify fee presentation for the patient.</p>	<p>Favor monovision. Tendency to recommend monovision as the first option to early presbyopes interested in contact lenses.</p> <p>Suggest only if asked. Offer soft multifocal trial only to patients who request it.</p> <p>Negative presentation. Begin presentations of soft multifocals with a long list of negative warnings about vision compromises, health risks, costs, etc.</p>
PROCESS	<p>Probe and suggest. Ask about daily use of computers and digital devices at intake. Probe for visual challenges and note them—then suggest that innovative multifocal contact lenses can provide an excellent solution. Let the ECP explain the technology and full benefits of the modality.</p> <p>Present options early. Discuss anticipated vision changes with early presbyopic contact lens wearers and non-wearers. Assure them that innovative products are available—when needed—to serve their changing visual needs.</p> <p>Be age-neutral. All ages of presbyopes express interest in multifocal contact lenses. Examine (and alter, if necessary) ECP and staff habits and assumptions about age and interest in this modality.</p> <p>Target prospects. Maintain a list of patients who exhibit visual needs for multifocal contact lenses or who express interest in their benefits. Then target-market with those prospects through social media, personal texts or phone calls, in language they connect with.</p>	<p>Limit communication. Display only spectacle lens point-of-sale materials targeting presbyopes.</p> <p>Over-selectivity. Avoid or discourage discussion of contact lens wear by presbyopes who have no prior contact lens wearing experience.</p> <p>Fee structure barriers. Require full payment of multifocal fitting fees before product trial.</p> <p>Fitting habits. Use same fitting process for multifocal contact lenses that have different optical designs.</p> <p>Single communicator. Only ECP communicates multifocal contact lens information as part of examination.</p>
CULTURE	<p>Connect emotionally. The onset of presbyopia often affects a patient deeply. Make an empathetic connection to the emotional and psychological changes they are going through.</p> <p>Project positivity. The options have never been better for achieving outstanding visual performance in comfort-enhanced contact lens materials. The entire office should convey excitement.</p> <p>Look to the future. Set office team goals to review and advance innovative product and service offerings.</p>	<p>Slow to adopt. Adopt innovative multifocal contact lens designs only after they have captured substantial market share.</p> <p>Inhibiting perspectives. Allow “been there done that,” “no complaint, no change,” and “not enough time” habits to inhibit advancing innovative products and services.</p> <p>Inconsistent staff messages. Allow staff to explain multifocal benefits and limitations to patients based on personal biases or incomplete knowledge.</p>

Applying Data for Practice Growth

Two generations, both large in number, are prime candidates.

Soft Multifocal Contact Lens Candidate Population

BABY BOOM	GENERATION X
▶ Born 1946-1964	▶ Born 1965-1984
▶ Age in 2015 51-69	▶ Age in 2015 31-50
▶ 76 Million	▶ 82 Million

SOURCE: U.S. Census Bureau

Soft multifocal contact lenses are in prime position to provide growth for the eyecare practice. Several key factors—advances in design and materials, the maturation of the population, and changing visual needs—contribute to a vast potential for the innovative technology of this modality to improve the lives of presbyopic patients and provide opportunities for practice growth.

THE POPULATION MATURES. Opportunities to serve patient needs with multifocal contact lenses are growing, as the great numbers of Baby Boomers are fully in their presbyopic years and Gen Xers follow right behind them. Both generations maintain active lifestyles, and the convenience, comfort and performance of multifocal contact lenses accommodate everyday activities by providing clear vision at all distances simultaneously. Given the value of these attributes, multifocal contact lenses hold the potential to claim a far greater share of the vision correction population.

VISION NEEDS ARE CHANGING. The growing use of digital devices among all presbyopic age groups increases demands on our eyes. Digital device use, along with dry working and living conditions, can contribute to digital eye strain and discomfort, especially among presbyopic contact lens wearers. Innovative multifocal contact lenses with moisture-retention technology can address these conditions.

TECHNOLOGY ADVANCES. Today's soft multifocal contact lenses provide outstanding visual performance and enhanced wearing comfort. There are notable improvements over early bifocal and multifocal contact lens designs that often performed inconsistently and frustrated ECPs and disappointed patients.

GREAT POTENTIAL FOR GROWTH. Surveys suggest that many ECPs are not taking advantage of the vast opportunity presented by soft multifocal contact lenses. Based on the patient demographic mix in most practices, the potential is for 20 percent or more of presbyopic contact lens patients to wear multifocal contact lenses. But just 9 percent of OD practices achieve this level of penetration today.

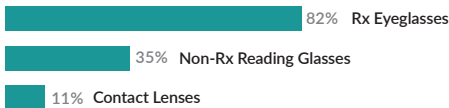
THE STAGE IS SET. These factors, combined with preferences for convenience and freedom among maturing consumers with discretionary income, set the stage for practices to present the varied and innovative benefits of soft multifocal contact lenses.

—Mark Wright, OD, FCOVD

There is great potential to increase the percentage of contact lens wearers.

Use of Eyeglasses vs. Contact Lenses to Correct Vision

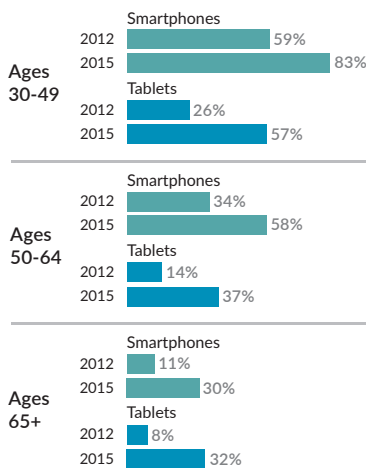
(among vision-corrected adults aged 40+)



SOURCE: The MSI's 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market.

Adult consumers of all age groups are increasing their use of digital devices.

Digital Device Ownership by Age



SOURCE: Pew Technology Device Ownership Research 2012, 2013, 2015

Multifocal contact lenses are seldom recommended, but satisfaction with them is high.

Soft Multifocal Contact Lens Wearers

9% Adults aged 40+ requiring multifocal vision correction who received a multifocal, bifocal or monovision contact lens recommendation—versus 91 percent who were recommended eyeglasses

67% "Very Satisfied" with soft multifocal contact lenses

SOURCE: The MSI's 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market.

Only about one practice in ten achieves a high penetration.

Untapped Potential for Soft Multifocal Contact Lenses

9% Fitting 20% or more

91% Fitting less than 20%

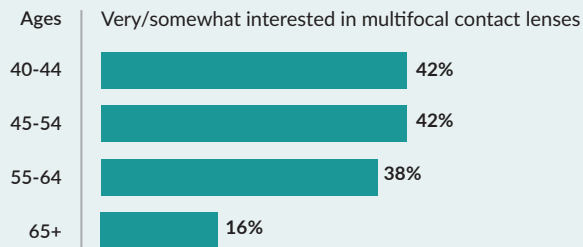
SOURCE: Bausch + Lomb Innovation Index, 2015

Consumer Interests vs. Eyecare Practitioner Habits

CONSUMERS EXPRESS HIGH INTEREST

Interest is High Across Age Groups

(among adults 40+ requiring multifocal vision correction)

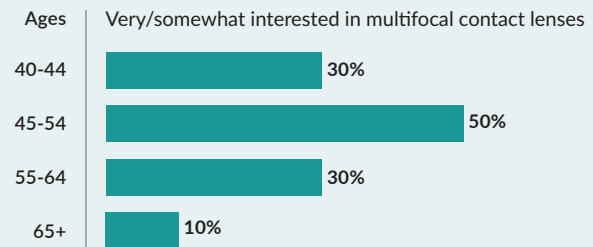


Consumers say: When asked how “interested/very interested” they are in trying multifocal contact lenses, consumers show a fairly consistent interest from ages 40-64. Even among ages 65+ interest remains.

SOURCE: The MSI’s 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

EYECARE PRACTITIONERS UNDERESTIMATE PATIENT INTEREST

ECPs Believe Presbyopes Aged 45-54 are Most Interested



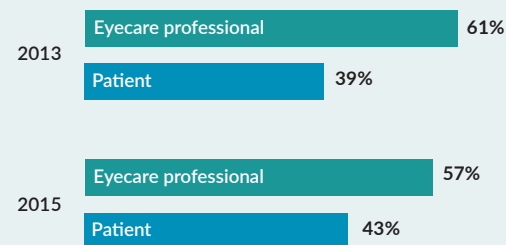
ECPs say: When asked to identify by age group how “interested/very interested” their patients are in trying multifocal contact lenses, ECPs cite the 45-54 age group far above others—and may overlook opportunities in other age groups.

SOURCE: The Soft Multifocal Contact Lens Eyecare Practitioner Usage and Attitude Study, 2015

CONSUMERS OFTEN HAVE TO ASK

Initiated Conversation Regarding Multifocal Contact Lenses

(among current wearers of multifocal contact lenses)



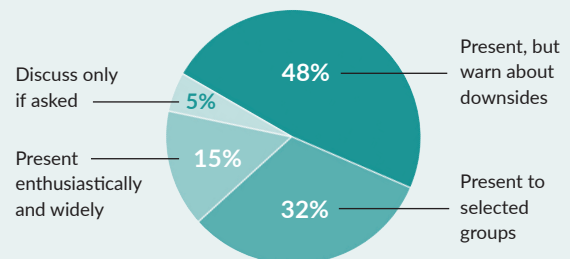
Consumers say: They initiate the conversation about multifocal contact lenses nearly half the time.

SOURCE: The MSI’s 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

EYECARE PRACTITIONERS ARE SELECTIVE IN RECOMMENDING

ECPs Are Selective in Recommending Soft Multifocals to Patients

Approach to Soft Multifocal Candidate Selection (% of ODs)



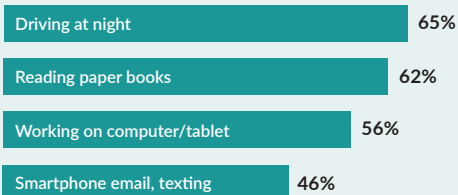
ECPs say: They present the option of multifocal contact lenses to patients, but often they do so to select groups only or warn patients about downsides. Only one in seven ECPs presents multifocal contact lenses enthusiastically.

SOURCE: The Soft Multifocal Contact Lens Eyecare Practitioner Usage and Attitude Study, 2015

CONSUMER NEEDS

Top Visual Challenges

(among prospective wearers)

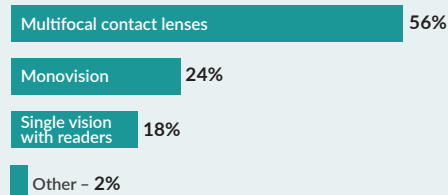


Consumers say: They want successful vision correction at all distances simultaneously to participate in a wide variety of everyday activities.

SOURCE: The MSI’s 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

EYECARE PRACTITIONER RECOMMENDATIONS

Contact Lens Treatment Prescribed for Presbyopia



ECPs say: They recommend multifocal contact lenses over half the time when recommending a contact lens solution for presbyopia—but nearly another half are recommended options that do not provide the near, intermediate and distance vision simultaneously that consumer say they want.

SOURCE: The Soft Multifocal Contact Lens Eyecare Practitioner Usage and Attitude Study, 2015

Present Multifocals to All Presbyopic Age Groups



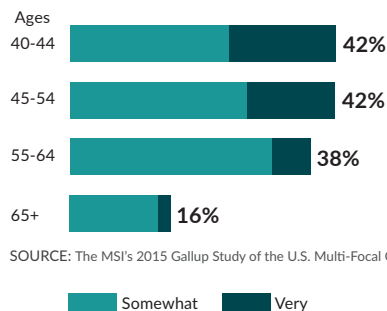
Kimberly Z. Hoyle, OD
Advanced Family Eye Care
Denver, NC

Assumptions, which can develop into habits, often rule behavior, and they die hard. But Kimberly Hoyle, OD, abruptly dismissed one assumption—that interest in contact lens wear falls off dramatically with age—when she learned results from MSI’s 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market. And she is initiating a culture change within her practice as a result.

Specifically, results from adults ages 40+ requiring multifocal vision correction showed that, in terms of interest in trying multifocal contact lenses, there is high interest from adults aged 40-64. Even for those adults aged 65+, there is interest in trying multifocal contact lenses.

Interest in Trying Contact Lenses for Multifocal Correction

(among adults ages 40+ requiring multifocal vision correction)



“The interest level in trying multifocal contact lenses is awesome,” says Dr. Hoyle. “It changed my thinking, and it’s changing our communication strategy. We now present multifocal contact lenses to all presbyopic age groups because all groups are interested.”

In changing the practice mindset, a first order of business was to spread the word throughout the office that common assumptions about age and interest in the benefits of contact lenses are out—and patients are not to be judged by how “young” they look. The interest level spans both Generation-Xers and Baby Boomers.

“I shared the contact lens interest data with staff to overcome assumptions that as we get older we are less interested in the benefits that contact lenses offer,” she explains. “When I saw the data, I was really surprised at how consistent interest was for ages 40 to 64. We’re always looking for new ways to enhance our patients’ lives with good

vision, and we now see that multifocal contact lenses are an important option that can provide that.”

Dr. Hoyle recognizes that Gen Xers and Boomers extensively use digital devices that require constantly shifting gaze between different distances. In fact, 32 percent of Gen Xers and 26 percent of Boomers report spending at least nine hours on digital devices each day. With greater digital device use, recommendations need to include innovative multifocal

lens designs that provide easy transitions between distances in materials that retain moisture. By understanding individual needs, ECPs can tailor messages and recommendations to enhance their lives.

Dr. Hoyle’s office conducts special multifocal contact lens fitting events, devoting an afternoon to featuring innovation in

multifocal lenses. Typically, they are attended by 15-20 patients who responded to an email or mailer invitation. To be patient-friendly, the practice sets a nominal fee for being trial fitted. The special event allows the office team to obtain information about the patients’ real-world vision demands. For a multifocal contact lens fitting, participants with a current valid prescription are provided with a trial lens with the closest match to their current powers. Patients are encouraged to evaluate the lenses in their living and working environments for a week before their prescription is finalized.

“Patients expect innovative technology from our practice,” says Dr. Hoyle, “and this shows that we strive to understand their individual needs and make the effort to provide solutions for them.”

CHANGE IN MINDSET. The practice expanded recommendations of multifocal contact lenses to all presbyopic age groups and hosts special fitting events.

- INNOVATIVE ACTIONS.** The practice takes steps to:
- **Target market.** Understand the individualized needs of each presbyopic age group, and present innovative options to meet them.
 - **Be personal.** Key your message to common life situations: “Do your glasses fog up on the treadmill?”
 - **Create specialness.** Feature innovative technology in fitting events that create excitement and meet individualized needs.

MEASURABLE CHANGE. About half of the fitting event patients take advantage of continued multifocal lens wear. Further, they often share their success with friends and family.

Provide Innovative Solutions —Even to Happy Patients



Chris Smiley, OD
Vision Professionals
Columbus, OH

For Chris Smiley, OD, the value of an eye exam lies in the opportunities it provides to improve the visual experience and comfort of his patients—and that includes even “happy patients.” That’s a departure from conventional optometric training. “As clinicians, we’re trained to solve problems,” he says. “But we need to spot opportunities to improve lives and then do so.”

“We’re trained to solve problems. But we need to spot opportunities to improve lives.”

A prime opportunity to fulfill that mission is with multifocal contact lenses, in his view. In his practice, multifocal contact lenses have replaced monovision as a leading choice for presbyopic vision correction. Technology advances and improved clinical success make it a compelling choice. And, for Dr. Smiley, the way to present the option is to communicate benefits and avoid categorizations. “When you talk to 40+ patients, you discuss their various daytime activities and underscore how multifocal contact lenses are an excellent option over eyeglasses for a physically active person,” Dr. Smiley says. “They recognize the value in that.”

Tasks for Which Multifocal Contact Lenses are Perceived as Superior to Eyeglasses

(top five reasons cited among current wearers)

- ▶ Better for a physically active person
- ▶ Makes a person look younger
- ▶ Better for daytime activities
- ▶ More comfortable to wear
- ▶ Allows me to grow older gracefully

SOURCE: The MSI’s 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

Dr. Smiley says that asking patients effective questions about their lives, work, and activities helps to personalize the presentation. He couples that information with the positive perceptions about the attributes of contact lenses that the Multi-sponsor Surveys’ 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market provides (better for physical activities, youthful appearance, comfort), and he tells the technology story that patients greatly value. Together, they provide a positive, fact-based presentation. That message is reinforced by a staff member, who is in the exam room, scribing and assisting in the presentation.

“Once we assess visual needs, we talk about how the lens delivers clear vision at far, near, and intermediary,” Dr. Smiley explains. Visual performance is critically important for patients: In the MSI’s 2015 Gallup study, “provides sharp, clear vision” is cited as a top criteria for distance (72 percent), near (70 percent), and mid-range (65 percent). Further, the MSI’s 2015 Gallup study confirms lens comfort

as a prime driver for patient adoption: Some 76 percent of current multifocal contact lens wearers cite “comfortable throughout the day” as an important factor in their type/brand of contact lens. “We do not wait for lens comfort and dryness issues to become problems,” says Dr. Smiley. “We proactively talk about how new technology retains moisture and sustains lens comfort even late in the day. Then we make recommendations to help to achieve their goals with successful lens wear.”

Dr. Smiley believes that ECPs who harbor an “If it ain’t broke” mentality often miss opportunities to upgrade a contact lens wearer to multifocal contact lenses—and improve their visual experience.

The MSI’s 2015 Gallup data underscores that opportunity: Sixty percent of contact lens wearers aged 40+ wear single-vision contact lenses—though 74 percent of them require correction for reading, and 56 percent need correction for computer-mid-range distance. Further, among prospective wearers of multifocal contact lenses, 81 percent require correction for reading, and 55 percent need correction for computer-mid-range distance.

Dr. Smiley’s tech-forward approach has paid off. His practice is perceived as the go-to place for innovative products, and that’s a vital differentiator in a competitive business environment. “We understand the value that patients recognize with contact lenses,” he says. “And being early to adopt innovative technology makes the difference between a high-performing contact lens practice and a low-performing one,” he says.

CHANGE IN MINDSET. The practice delivers value in the exam with positive staff and practitioner messaging about the life-changing benefits of innovative technology like multifocal contact lenses.

INNOVATIVE ACTIONS. The practice takes steps to:

- **Recognize the value.** Make sure the entire staff understands the value that patients see with contact lenses.
- **Push to improve.** Look to improve even “happy” patients. There are opportunities with presbyopes in single vision and monovision and former wearers.
- **Reinforce the message.** Utilize office staff to reinforce the benefits of multifocal contact lenses with corroborating voices throughout the office.
- **Create patient advocates.** Patients who receive innovative solutions share their positive experiences online and by word-of-mouth.

MEASURABLE CHANGE. The practice increased new fits of multifocal contact lenses—and fields more patient inquiries about innovative technology that patients heard about through the practice.

The 3-Zone Progressive™ Design: Meeting the Dynamic Needs of Today's Presbyopic Patient

While each generation may use digital technology differently, Boomers and Gen Xers rely heavily on computers and smart phones on a daily basis.

A recent survey¹ finds that, among a presbyopic population 61 percent look at multiple screens/use multiple digital devices at the same time, and 58 percent experienced eye strain or vision problems as a direct result of using technology.

For presbyopic contact lens patients, sustained tasks on digital devices and switching between digital devices can impact the contact lens wearer experience.

The Multi-sponsor Surveys' 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market identifies the key drivers of overall satisfaction with multifocal contact lenses. Sharp, clear vision at near and mid-range distances emerge as the top two characteristics driving satisfaction, followed by ease of transition between near and far and comfort throughout the day.

Key Drivers of Satisfaction with Multifocal Contact Lenses

(among current wearers)

- ▶ Provides sharp, clear vision at near distance
- ▶ Provides sharp, clear vision at mid-range
- ▶ Ease of transition between near and far distance

SOURCE: The MSI's 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

In developing the 3-Zone Progressive™ Design lens, Bausch + Lomb researchers recognized that the unique optical and anatomical characteristics of an individual's presbyopic eye will play a large role in defining that individual's retinal image quality. The researchers were also aware of the changing needs of the presbyopic digital device user and the limitations of optical designs for presbyopic patients. While conventional multifocal contact lens designs used refractive error or refractive error and pupil size in optical design development, the 3-Zone Progressive™ Design used a broader approach and accounted for refractive error, higher order aberrations, pupil diameter, corneal curvature, axial length, and residual accommodation across nine distances in the optical design development.

During development of the 3-Zone Progressive™ Design lens, novel lens optics were evaluated using these unique features of a diverse population of presbyopic eyes. Diameter of a near zone, diameter of an intermediate zone, total add power,

and change in power across distinct zones were assessed to optimize predicted visual outcomes. By adjusting diameters of the near and intermediate zones and the change in power within these zones, light energy can be redistributed to improve near and intermediate visual outcomes. The final 3-Zone Progressive™ Design was selected based on the optimal visual outcomes across the nine distances (6 m, 2 m, 1 m, 67 cm, 50 cm, 40 cm, 33 cm, 28 cm, and 25 cm) and "real world" patient experience wearing the multifocal low- and high-add lenses.

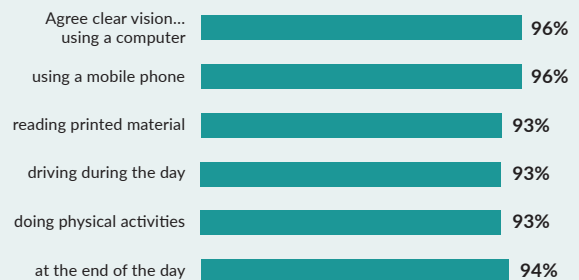
To assess the real-world performance among a diverse population of patients, 39 ECPs (from 10 countries) refitted 422 existing soft contact lens wearing presbyopes into 3-Zone Progressive™ Design lenses using balafilcon A material. Patients returned for follow-up visits after 1-2 weeks. ECP assessment of lens performance including ease of fit, and patient satisfaction with lenses in their real world conditions, were measured using a 6-point agreement survey.

Ratings of vision in real-world situations highlight the performance of the 3-Zone Progressive™ Design. For near tasks such as using a mobile phone or reading printed material, 96 percent and 93 percent of patients, respectively, agreed the multifocal design provided clear vision. While using a computer, 96 percent of the patients agreed the design provided clear vision. And 93 percent of patients agreed that they had clear vision while driving during the day. For patients challenged by changing vision and vision demands, the 3-Zone Progressive™ Design lenses were able to help presbyopic patients see clearly for near, intermediate, and distant vision tasks.

The simplified fitting recommendations were also rated highly. Ninety-two percent of the practitioners agreed that the fitting guide made it easy to fit the 3-Zone Progressive™ Design lens.

Percent of Agreement for Real World Wearing Experiences

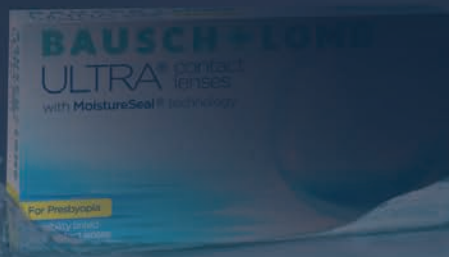
(among presbyopic patients refit with 3-Zone Progressive™ Design*)



* balafilcon A lens material

¹ The 2015 American Eye-Q® Survey from the AOA

What are you looking for in a new multifocal contact lens?



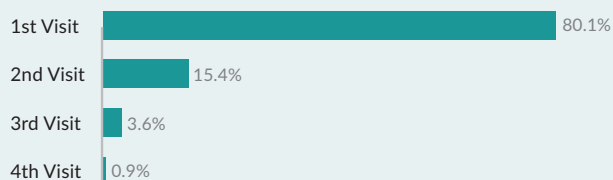
Innovation in comfort and vision arrives Spring 2016

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Number of Visits Required For Successful Fit Following Fit Guide

(among presbyopic patients refit with 3-Zone Progressive™ Design*)



* balafilcon A lens material

Eighty percent of patients were successfully fitted in one visit, and 96 percent of the patients were fitted in two visits. This compared to only 59 percent of patients fitted in one visit for practitioners that reported not following the fitting guide.

As use of digital devices by presbyopic contact lens patients grows, the need for sustained near and intermediate vision increases. Sharp, clear vision at near and mid-range distances emerged as the top two characteristics driving satisfaction. In designing a multifocal lens that accounted for refractive error, higher order aberrations, pupil diameter, corneal curvature, axial length, and residual accommodation across nine distances, the innovative 3-Zone Progressive™ Design can help presbyopic patients enjoy the benefits of wearing lenses.

CHANGE IN MINDSET. Conventional multifocal contact lens designs used refractive error or refractive error and pupil size in optical design development. To meet the needs of today's presbyopic patient, a broader approach accounting for refractive error, higher order aberrations, pupil diameter, corneal curvature, axial length, and residual accommodation across nine distances was used for the 3-Zone Progressive™ Design development.

INNOVATIVE ACTIONS. Innovative practices take steps to:

- **Present real world benefits.** Focus on satisfaction drivers that patients identify. Communicate the everyday benefits derived from an innovative design.
- **Improve fitting success.** Establish a habit of following the 3-Zone Progressive™ Design fitting guide and maximizing clinical success.
- **Highlight innovation, connect to emotions.** Be positive in letting patients know they are receiving a high-tech, innovative product that provides outstanding performance, and be empathetic to the emotional changes at the development of presbyopia.
- **Be bold, expand offerings.** Examine old assumptions, engage office team, then expand product presentations to more presbyopic patients.

MEASURABLE CHANGE. Collect real world examples of patient success. Share successes with office team and presbyopic patients to highlight innovation in practice.

Open the Door to Success for Former Wearers



Brittany M. Mitchell, OD
Alabama Vision & Hearing Center
Birmingham, AL

“To be successful with multifocal contact lenses, you have to believe in them and recommend them,” says Brittany M. Mitchell, OD. “And your positivity comes across to the patient.”

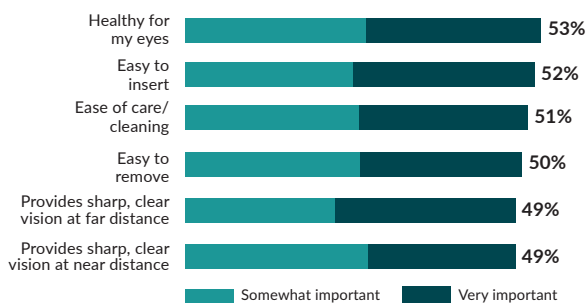
At her practice, that process of recommending multifocals is built into the system. In the intake, staff asks questions about vision. (e.g., “Are you having any trouble seeing the computer?”) and

notes the answer in the record. They present a near-reading card, which often highlights a patient’s struggle to see up close. The staff is trained to then suggest, “There is new technology in multifocal contact lenses that can help.”

A prime opportunity is with former contact lens wearers. The Multi-sponsor Surveys’ 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market shows that 80 percent of former wearers are interested in trying new multifocal contact lens technology designed to improve near vision and intermediate vision.

Attributes Rated Very Important in Choice of Type/Brand of Contacts

(top reasons cited among former wearers)



SOURCE: The MSI’s 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

Dr. Mitchell has turned that renewed interest into an action plan. “We maintain a list of patients who were not fully successful with contact lens options for presbyopia,” she explains. “Then we let these dropouts know about innovative new options because we know they’re interested in trying multifocal contacts again.”

The MSI’s 2015 Gallup study highlights a wide variety of attributes that former wearers say are important in choosing a multifocal contact lens. Topping the list: health, care and handling, and vision at various distances. Dr. Mitchell communicates advances in multifocal lens technology since the perspectives of former wearers may be driven by their past experiences.

Dr. Mitchell and the office team present the benefits of multifocal contact lenses in providing clear vision, expanding

their range of vision, and freeing them from eyeglasses, all attributes that patients say they value. “We explain how advances in the technology make this possible,” she adds.

Dr. Mitchell is convinced that a broad spectrum of presbyopic patients will benefit from multifocal contact lenses, if only ECPs will take the time to understand the technology advances, explain the benefits—and, in some cases, shed residual notions of past technology that fell short of expectations.

“We let dropouts know about innovative new options because we know they’re interested in trying multifocal contacts again.”

“Doctors need to talk more about technology advances because our patients—including Gen-Xers and Boomers—hear about innovative technology in the latest sleep monitor or mobile phone,” says

Dr. Mitchell. “They want to know they’re getting that same high level of innovation in their eyecare.”

Practitioners also need to initiate discussions about innovative technology, Dr. Mitchell believes. She notes that the MSI’s 2015 Gallup study reveals that the patient (and not the practitioner) initiates the conversation about multifocal contact lenses more than four times in ten. “That’s not the case here,” says Dr. Mitchell. “We see ourselves as the prescribers who should be presenting technology that can change lives—not just fielding inquiries from our patients about what’s new.”

Dr. Mitchell believes that there are multiple benefits to the practice that takes the time to introduce and fully explain innovative technology and its benefits. Success is largely tied to getting the conversation going, says Dr. Mitchell. “Fitting multifocal contact lenses really opens the door to great opportunities to improve our patients’ lives,” she says, “and with innovative products like multifocal contact lenses, we have to be the ones to open that door.”

CHANGE IN MINDSET. Both practitioners and staff look for opportunities to initiate conversations about the benefits of multifocal contact lenses. The practice sees opportunities in all presbyopic groups, including contact lens dropouts who express desire to try contacts again.

INNOVATIVE ACTIONS. The practice takes steps to:

- **Note and recommend.** Probe for visual needs and record them. Then recommend innovative products that meet those needs.
- **Project positivity.** The office team’s excitement about innovative products resonates.
- **Talk benefits, technology.** Patients hear about technology advances in other medical areas, and they expect it here.
- **Seize the opportunities in the database.** Keep track of former wearers and communicate advancements.

MEASURABLE CHANGE. The practice’s team approach to proactively initiate discussions of multifocal contact lenses has increased fits, including among former wearers.

Successful Patients Become Practice Advocates



Justin Bazan, OD
Park Slope Eye
Brooklyn, NY

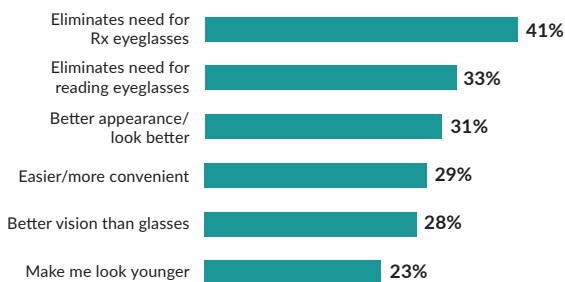
Justin Bazan, OD, has trained his staff at Park Slope Eye to spot signs of presbyopia the moment patients walk through the door. It's as simple as observing a patient's posture with their ubiquitous cell phone.

Staff will observe patients as they read their phone, to see if they extend their arms, adjust head posture, peek beneath their eyeglasses, or have bumped up the text size. These signs prompt the staff to start a conversation that can improve the patients' lives.

"Our staff is trained to recognize the physical signs that a patient may be struggling with presbyopia, and they recognize how the psychological benefits of multifocal contact lenses can help patients recognize their true value," says Dr. Bazan. This proactive approach has moved multifocal lenses from being a niche solution a few years ago to being a leading option that is dispensed everyday.

Reasons for Interest in Trying Multifocal Contact Lenses

(top reasons cited among prospective wearers)



SOURCE: The MSI's 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

Many patients make subconscious adjustments to compensate for their advancing presbyopia. They may fear or not want to admit that their vision is changing—and they may be unaware of innovative vision correction options now available to them. Discussing such changes, and recommending innovative solutions, is part of being their eyecare practitioner, say Dr. Bazan.

The Multi-sponsor Surveys' 2015 Gallup Study of the Multi-Focal Contact Lens Market provides insights into how to address psychological perceptions. A total of 59 percent of those aged 40-59 say they would be interested in trying

multifocal lenses, citing as top reasons: eliminate the need for Rx eyeglasses or readers and better appearance/look better.

The MSI's 2015 Gallup study also shows steps that consumers take to learn more about multifocal contact lenses: speaking to their doctor, speaking to friends or relatives who wear contact lenses, and looking up information online.

"In our social media, we highlight testimonials from successful multifocal contact lens wearers—and other patients see that's what they need."

A lot of online information comes from social media, which all ages engage in today, Dr. Bazan notes. He built his practice's success on social media and patient testimonials on its Facebook and Yelp pages. The practice updates those stories on a daily basis.

"Our successful patients become advocates for our practice," says Dr. Bazan. "In our social media, we highlight testimonials from successful multifocal contact lens wearers—and other patients see that's what they need."

Dr. Bazan plans to intensify the practice's use of social media to promote the launch of the Bausch + Lomb 3-Zone Progressive™ Design Multifocal Contact Lens. In the works are several distinct types of messages, tailored to segments of patients by age, occupation and other factors. Some of the messages are educational, imparting the technology story, while others will let happy patients spread the word. "We'll always use patient testimonials," he says, "because they register as organic and genuine."

CHANGE IN MINDSET. Practitioners and staff proactively scan for opportunities to discuss the benefits of multifocal contact lenses. In its social media, the practice highlights enthusiastic user reviews of presbyopic patients who are successful in multifocal contact lens wear.

INNOVATIVE ACTIONS. The practice took steps to:

- **Observe signs of visual changes.** Educate staff to engage prospective multifocal lens patients.
- **Promote psychological value.** Highlight value that interests prospective multifocal patients.
- **Social media touches everyone.** Frequent updates to the practice's social media builds momentum for multifocal success.

MEASURABLE CHANGE. Fitting multifocal contact lenses is an everyday solution, up from being a once-in-a-while niche product.

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Research and Methodology

Multi-sponsor Surveys' 2015 Gallup Study of the U.S. Multi-Focal Contact Lens Market

A consumer survey was conducted in October 2015 by Multi-sponsor Surveys, Inc. Data is derived from a sample size of 796 adults, aged 40+, who completed the survey, which assesses visual needs, preferences, and interest levels regarding multifocal contact lenses.

The Soft Multifocal Contact Lens Eyecare Practitioner Usage and Attitude Study, 2015

A survey was conducted in December 2015 by Jobson Optical Research, and data is derived from a sample size of 398 ECPs who prescribe multifocal contact lenses. The survey assesses ECP attitudes and ECP-patient communications, as well as dispensing patterns regarding soft multifocal contact lenses and options for presbyopic patients.

The Bausch + Lomb Innovation Index, 2015

A baseline survey was conducted in May 2015 by Jobson Optical Research and sponsored by Bausch + Lomb. Data is derived from 282 ECP-owners of eyecare practices, who completed the survey. The survey assesses levels of innovation in four categories of the eyecare practice: business/financial management, patient management/marketing, staff management, and product management.



She chose contact lenses over eyeglasses once.
Now you can give her that choice again.

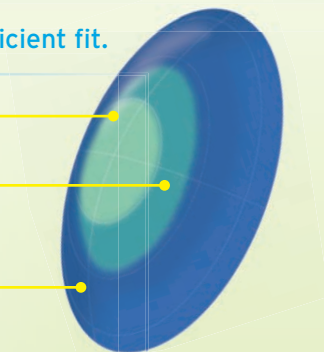
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that gives your patients comfortable
vision across all distances.

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- **INTERMEDIATE VISION** —————
Consistent zone where Add power gradually transitions
to accurate distance power¹
- **DISTANCE VISION** —————
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REFERENCE: 1. Analysis based on use of a Hartmann-Shack wavefront sensing instrument to map lens power across contact lenses. More than 6000 unique measurements over the central 6mm of a contact lens were plotted to determine local power measurement as a function of radial distance from the center of the lens.

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