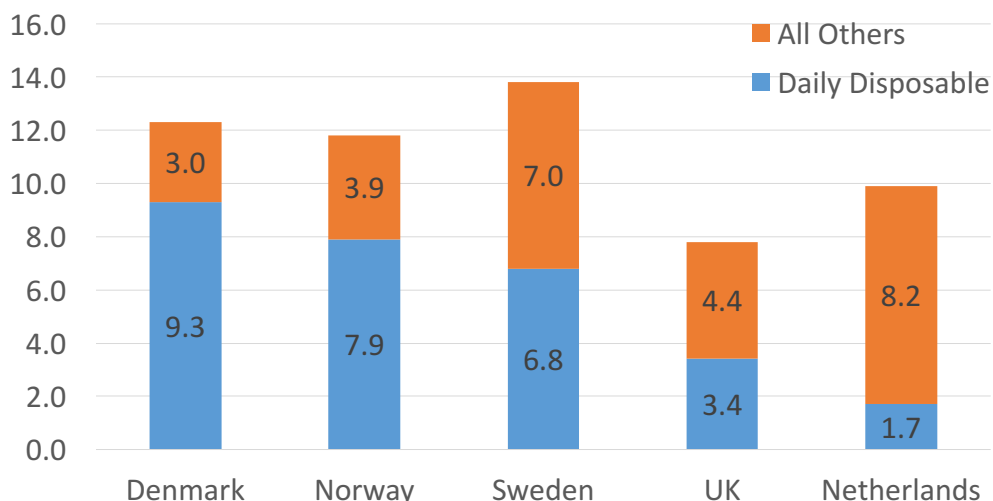


Daily Disposables; The last days of the contact lens fitter?

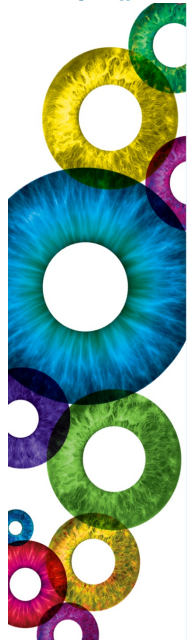
Philip Morgan
Ross Grant



Percent of population wearing...



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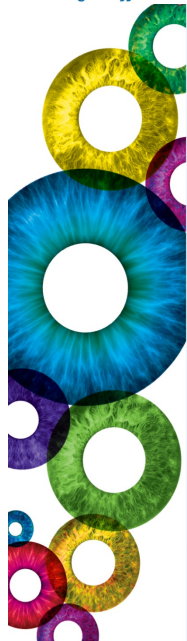


Poll Question 1

- Are DD contact lenses a threat to the skill and profession of contact lens fitting?

1. Yes
2. No

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Poll Question 2

- Should we be fitting more DD in the Netherlands?

1. Yes
2. No

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Poll Question 3

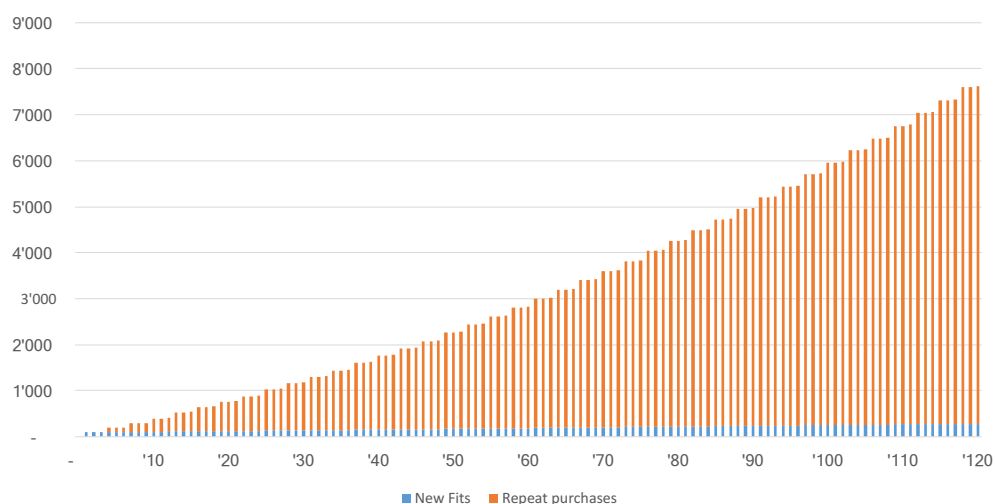
- What is your main reason for fitting other lenses than DD?

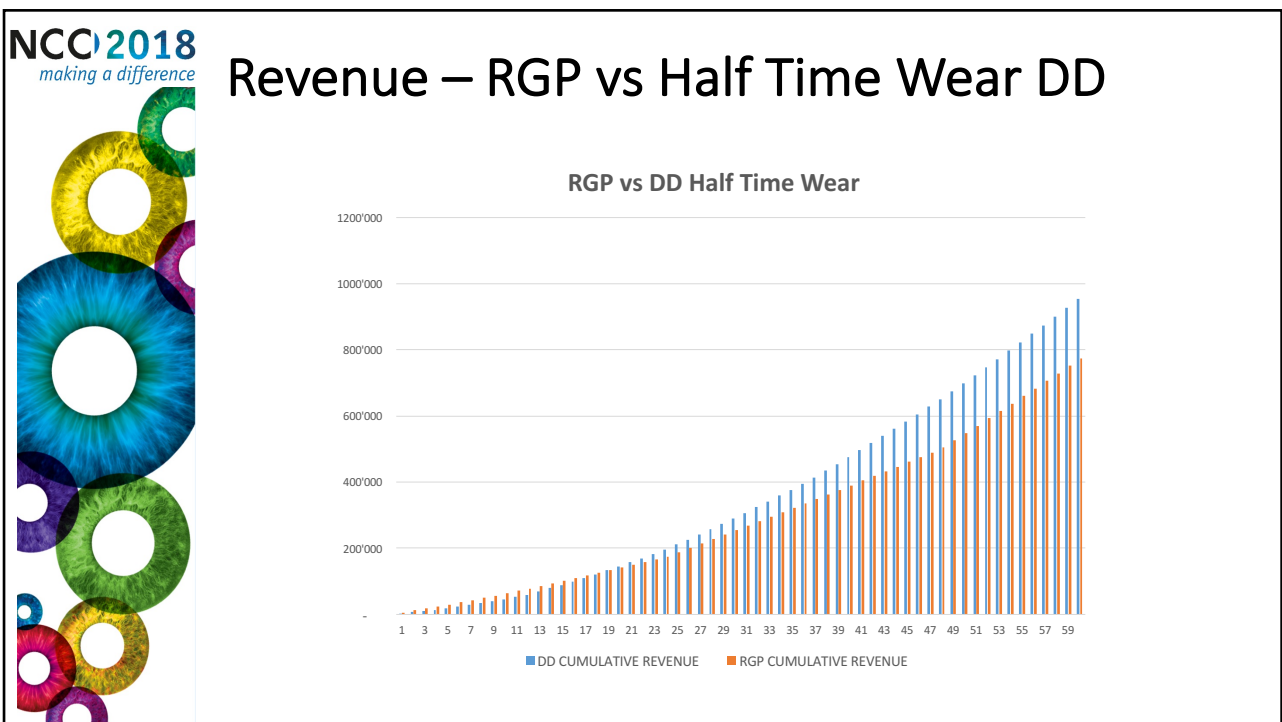
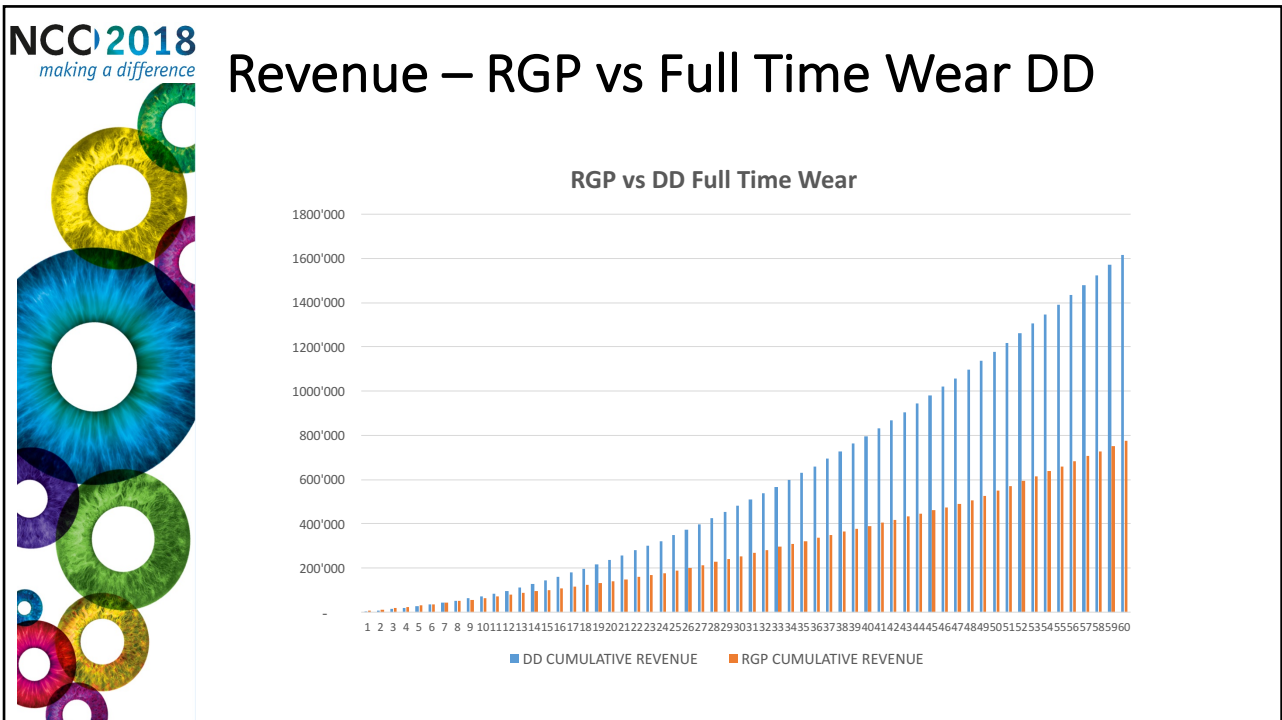
1. There is no skill in DD fitting
2. It is less expensive for my patients
3. DD lenses are too freely available on the internet and now in retail

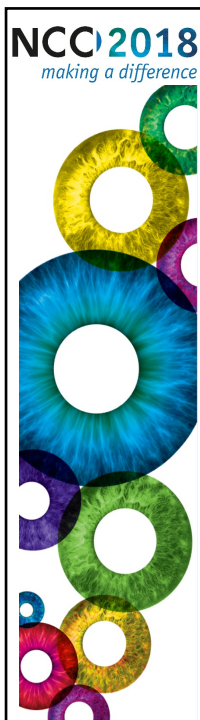
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Revenue from new fits and repeat purchases

€100 new fit product sold per month, +20% per annum new fits, repurchase every 3 months

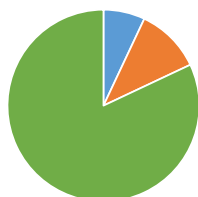






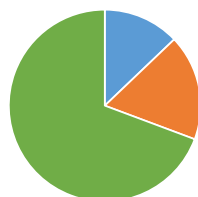
Relative sources of revenue

Full Time Wear DD Revenue



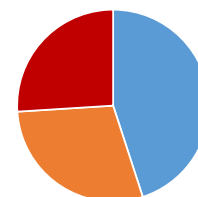
■ Fitting fees ■ Annual checks ■ Lenses

Half Time Wear DD Revenue

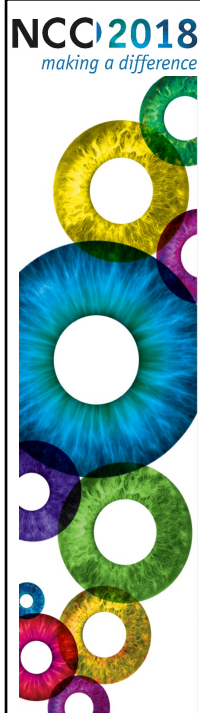


■ Fitting fees ■ Annual checks ■ Lenses

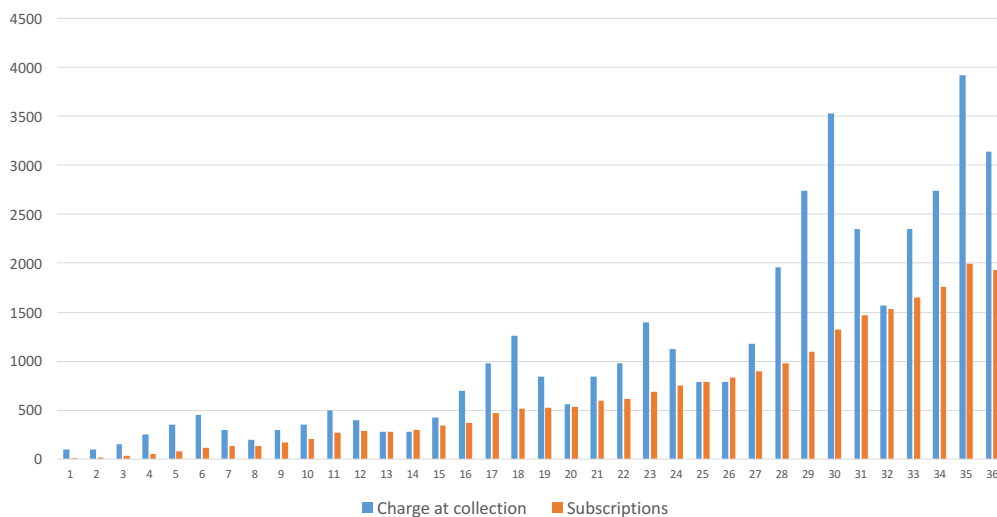
Full Time Wear RGP Revenue



■ Fitting ■ 2-Year Replacement ■ Solutions

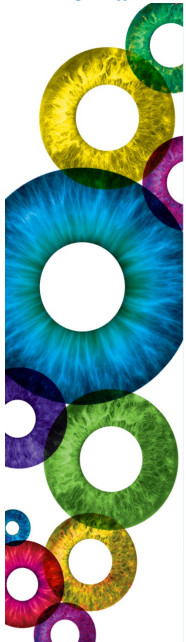


Charge at collection vs subscriptions



■ Charge at collection ■ Subscriptions

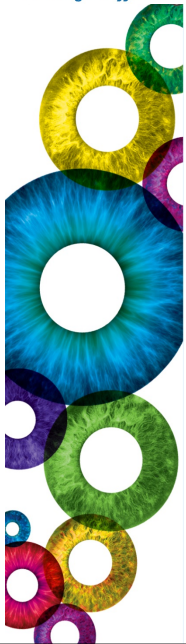
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Subscription Payments

- Initial drop in cash flow
- Much smoother cash flow
- Happens whether you are there or not
- Inertia keeps patients
- Link promotions to other products/services

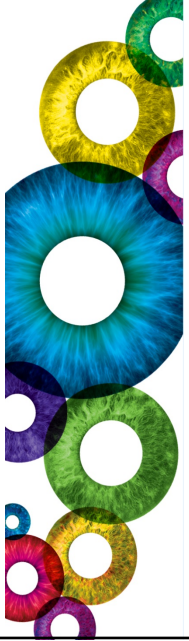
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Differentiating from the internet suppliers?

- Option 1: Do what they do
 - Supply by autoshipment
 - Materials only to be price competitive
- Option 2: AND...provide professional services
 - Fitting services
 - Aftercare service
 - Website support – change orders, appointments, inquiries
 - Subscription service
- Option 3: Just provide the professional services
 - Let them get the DD lenses from elsewhere if they choose to

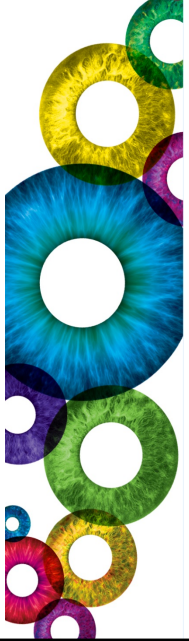
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Poll Question 4

- My preferred approach to differentiate myself from internet suppliers would be...
1. Set up an internet shop
 2. Set up an internet shop AND supply professional services
 3. Supply professional services only

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Thank You