



Supporting & Growing the
Optical Industry and the
Eye Care Community

24/03/2010 March 17,
2010

Overview of Luxottica Group



Luxottica Group

- Invests in growing overall quality eye care and the eyewear industry
- Supports and is fully committed to the success of independent eye care professionals



LUXOTTICA

Retail

LUXOTTICA

Manufacturing
&
Wholesale

EyeMed
VISION CARE.

LUXOTTICA

US Optical Industry



Industry Opportunities

Flat Consumption of Frames and Lenses

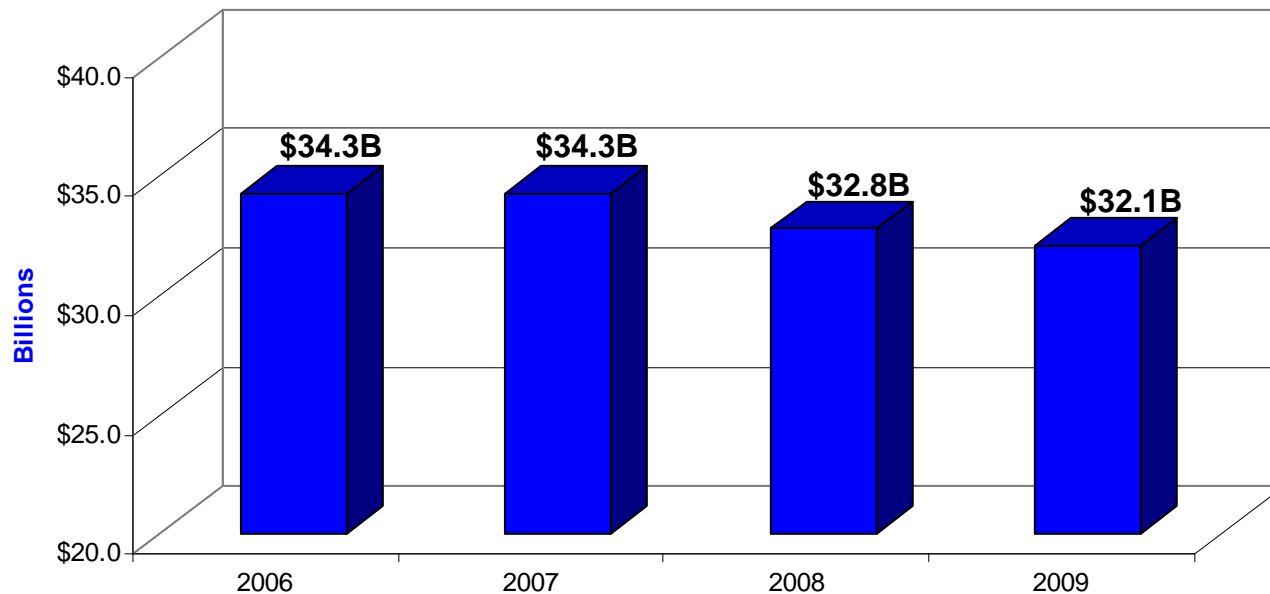
For the past 20 years we
have sold around 70
Million pairs a year

Sunglasses are still under penetrated in North America compared to the rest of the world.

Less than 10% of Americans
are spending \$30 or more a
year on sunglasses

Industry Opportunities

- The overall Eye/Optical category is not growing



How do we work together to support the growth of the industry?

Industry Opportunities

61 Million at High Risk for Serious Vision Loss

An estimated 61 million adults in the United States are at high risk for serious vision loss, but only half visited an eye doctor in the past 12 months.

14 Million with Vision Impairment

Approximately 14 million individuals aged 12 years and older have visual impairment, among which more than 80% could be corrected to good vision with refractive correction.

Growth Drivers

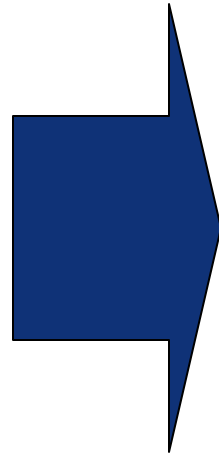
Grow Eye Exams

Promote Quality Eye Care and Eyewear

Educate Consumers About Sun Protection/Outdoor Vision

Grow Eye Exams

Unite and invest in promoting the need for more frequent eye exams.

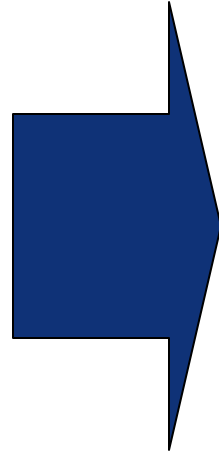


- We are thinking **BIG**
- We and others are investing
- We are working together

Educate Consumers on Quality Eyewear and Eye Care

Consumer advertising and marketing efforts

- **Build consumer awareness**
- **Generate demand for quality eyewear products**
- **Support quality eye care.**



We are investing over \$100 million in advertising frame brands and the importance of regular eye exams

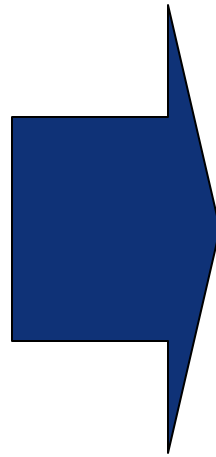
A Different Approach to Vision

- EyeMed Vision Care is aligned with professional providers and organizations
 - We are in favor of utilization of the eye examination
 - Early detection leads to early treatment and overall health care cost avoidance
 - Consistent with category growth
- EyeMed markets awareness to drive enrollment in voluntary plans and use of the eye examination
 - EyeMed distributes more than 10 million direct to member communications annually
 - From 2005 - 2009, total reported eye exam claims grew 113%

Educate Consumers about Sun Protection/Outdoor Vision

Eye health is important to all of us and we all support 100% UV protection.

Sunglasses are a clear opportunity category.



We are investing in educating consumers about sun protection

Only 8.5% of ECP revenues are from sunglasses

We see an opportunity to grow to more than 15 to 20%, while growing other revenues

Promoting Quality Eye Care and Eyewear

The Working Together Series

- We met with hundreds of customers and providers nationwide.
- We have listened, learned and shared knowledge.

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- Expand and increase provider development and CE
 - Strengthen ties with schools and professional associations
 - Continue to explore ways to improve profitability of managed vision care plans

Remember The Problem



The Solution



Thank you!!

