

# Dry Eye Mask Real-World Data Study

*Consumer Claims Substantiation*



**IQVIA Claims Center of Excellence – Consumer Health**



# Agenda

- + Study objectives and Overview of Methodology
- + Key findings:
  - › Respondent Profile and Experience with Dry Eye
  - › Understanding the Consumer Journey & Usage Experience
  - › Perceived benefits & Dry Eye Mask Satisfaction
- + Summary and Way Forward
- + Appendix



# Research Objectives & Methodology Overview

# Wizard Research is looking to generate new claims to support Dry Eye Mask in communicating its effectiveness and expanding the client pool

## Study Objectives



## Outcome

- Strong claims which can be used for HCP and direct-to-consumer activation
- Insights into consumer journey to understand the product choice, touchpoint importance, and compliance
- Potentially bigger client pool via activation of claims in new channels of trade

# Real world insights were obtained from Dry Eye Mask users via completion of survey by telephone interview or via self-completion online

## Sample profile and Methodology overview



### Sample Profile

- **Sample:** N= 273
- **Gender:** Males and Females
- **Age:** 18 years old and above
- **Geography:** USA
- **Data collection period:** 18 May – 01 July 2022
- **User criteria:**
  - Users who have bought and used Dry Eye Mask for **at least 1 month** prior to the start of the study
  - Users who use Dry Eye Mask **more than once a week**
- **LOI:** 15 minutes
- Data was collected from a quantitative survey completed via **telephone interview and self-completion of the online survey by respondents\*\***



### Survey Modules

#### Consumer journey


#### Usage experience and perceived benefits

- Perceived symptom improvement
- QoL improvement assessment (based on consumer recall of daily limitations caused by dry eye **before and after** product use, with measurement tool adapted from OSDI)

#### Satisfaction with Dry Eye Mask

\*\* Mixed methodology of data collection was used due to challenges in achieving target recruitment via telephone interview alone





**Respondent  
Demographics  
Profile &  
Experience with  
Dry Eye Symptoms**

Females make up the majority of the users of Dry Eye Mask, with age typically ranging from 45 to 80 years. On average, respondents have been suffering from dry eye symptoms for as long as 7 years, with dry and itchy eyes being the most common symptom

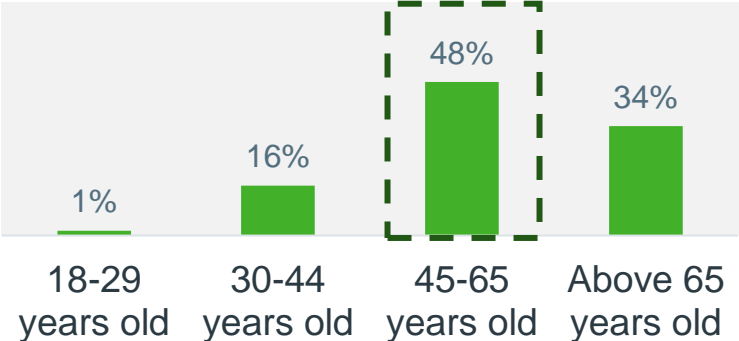
*Respondent demographics and their experience with dry eye*

**Gender**



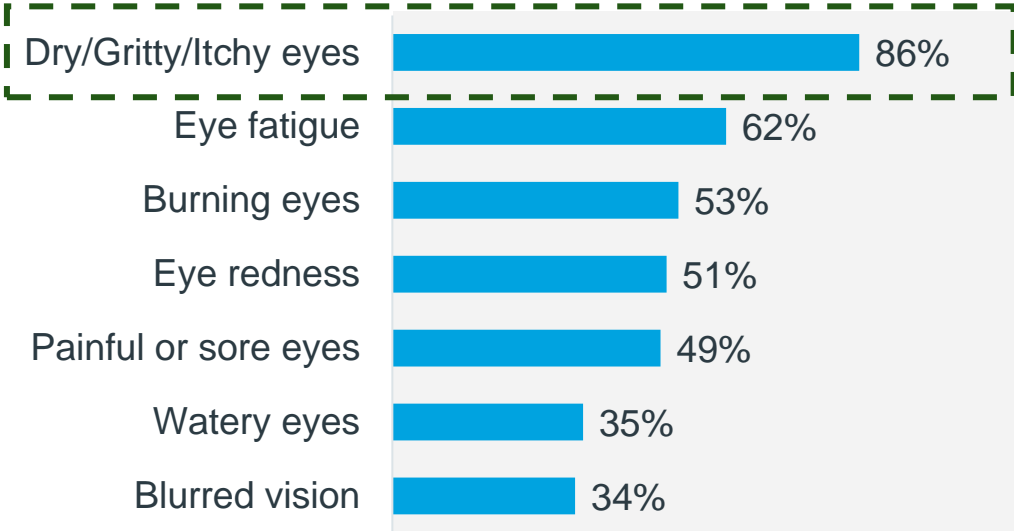
**Age**

- Average age: 58 years old



First experienced dry eye symptoms  
Average: **7 years ago**

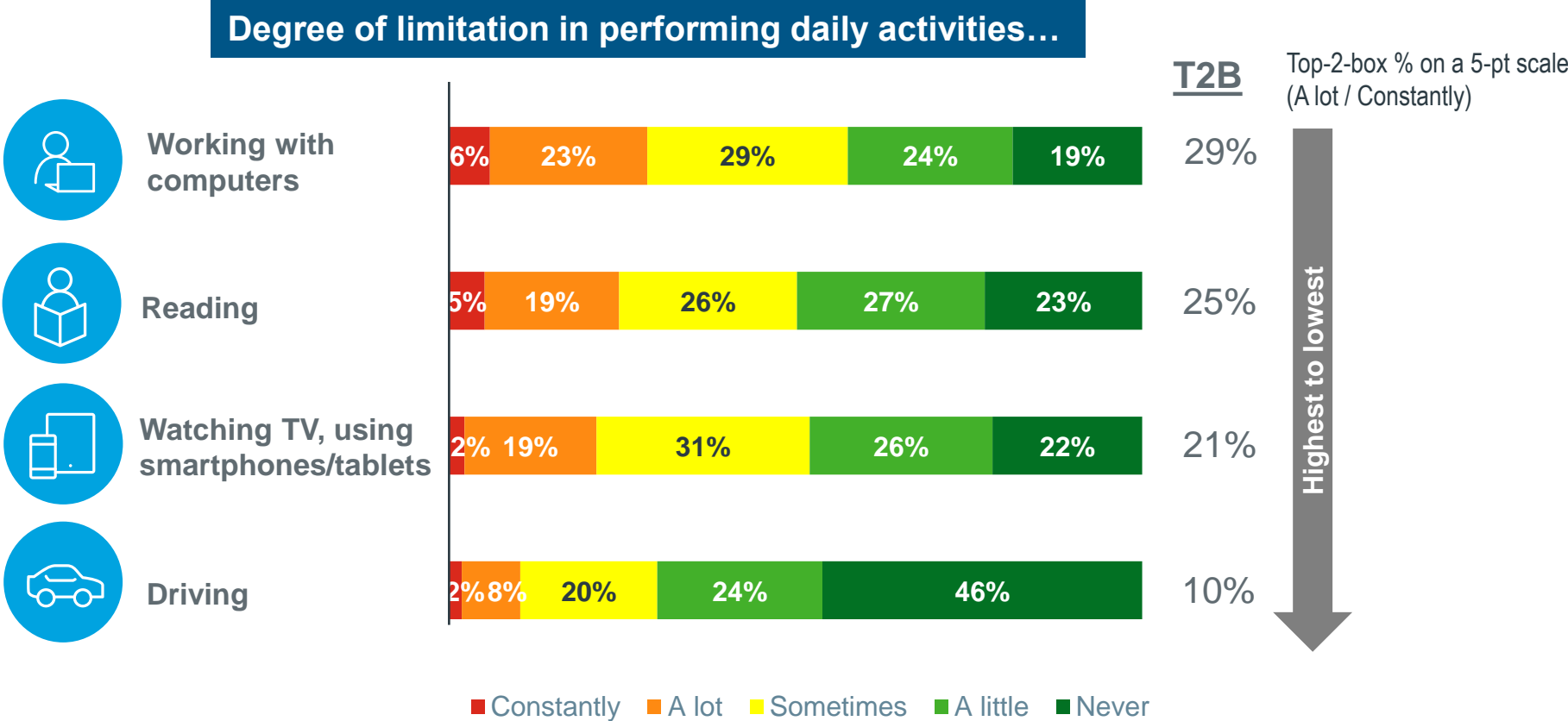
**Common experienced eye symptoms**



Base: All respondents (N=273)  
 S1. Please choose your gender below. S2. May we know your full age in years? \_\_\_\_  
 S6. Have you experienced any of the following eye symptoms before using Dry Eye Mask?  
 Q1. How long ago did you first experience dry eye symptoms mentioned previously?

# Dry eye symptoms typically impact the respondent's ability to work on a computer, read, watch TV or use gadgets prior to the use of Dry Eye Mask


*Impact of dry eye on QoL before using Dry Eye Mask*



Base: All respondents (N=273)

Q2. **Before** using Dry Eye Mask, how much have your eye symptoms limited you in performing the following activities?



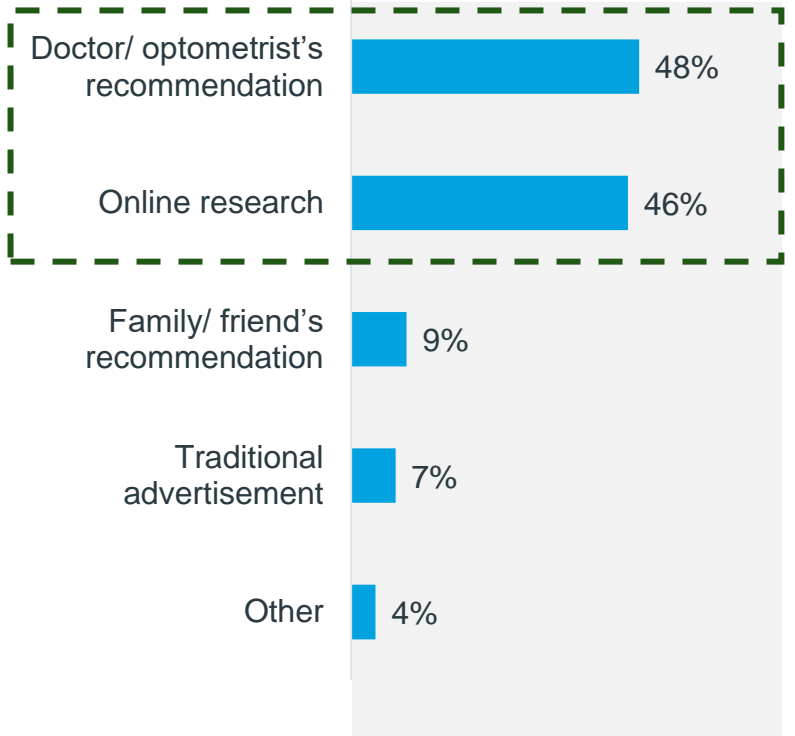


**Consumer  
Journey & Usage  
behavior**

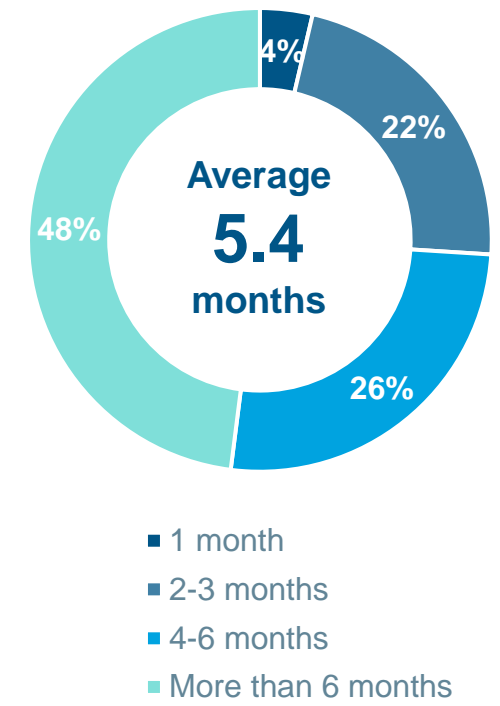
**Almost half of the respondents claimed that ‘doctor / optometrist’s recommendation’ and ‘online research’ are their main reasons of purchasing Dry Eye Mask. Most respondents have been using Dry Eye Mask daily, for an average of 5 months**

*Dry eye mask purchase driver and usage behavior*

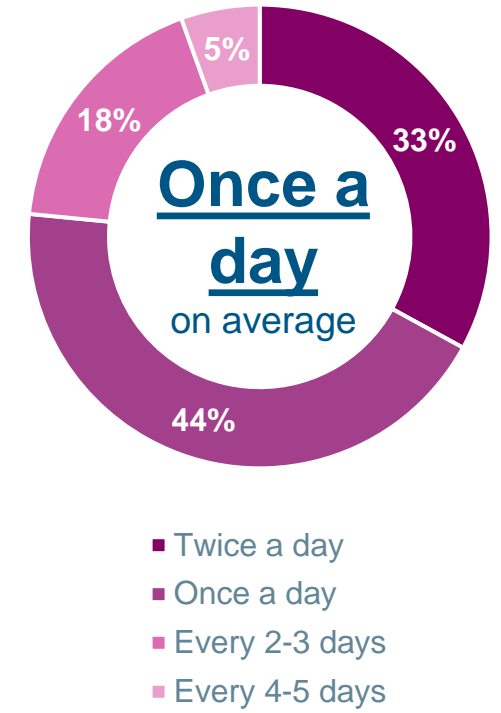
**Purchase driver**



**Duration of use**



**Frequency of use**

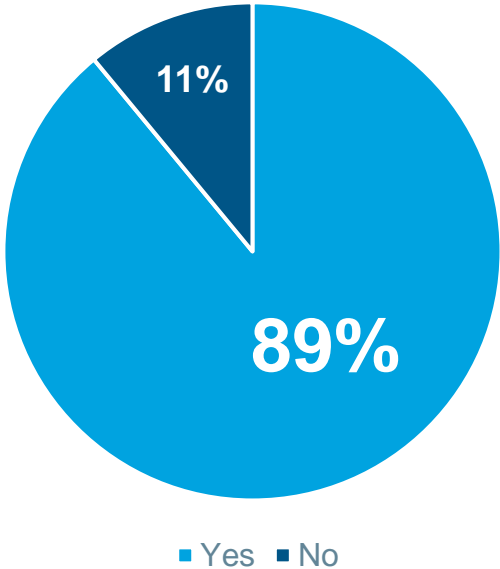


Base: All respondents (N=273)  
 S3: What made you choose to buy Dry Eye Mask?  
 S4: How long have you been using Dry Eye Mask?  
 S5: And how often do you use Dry Eye Mask in a week?

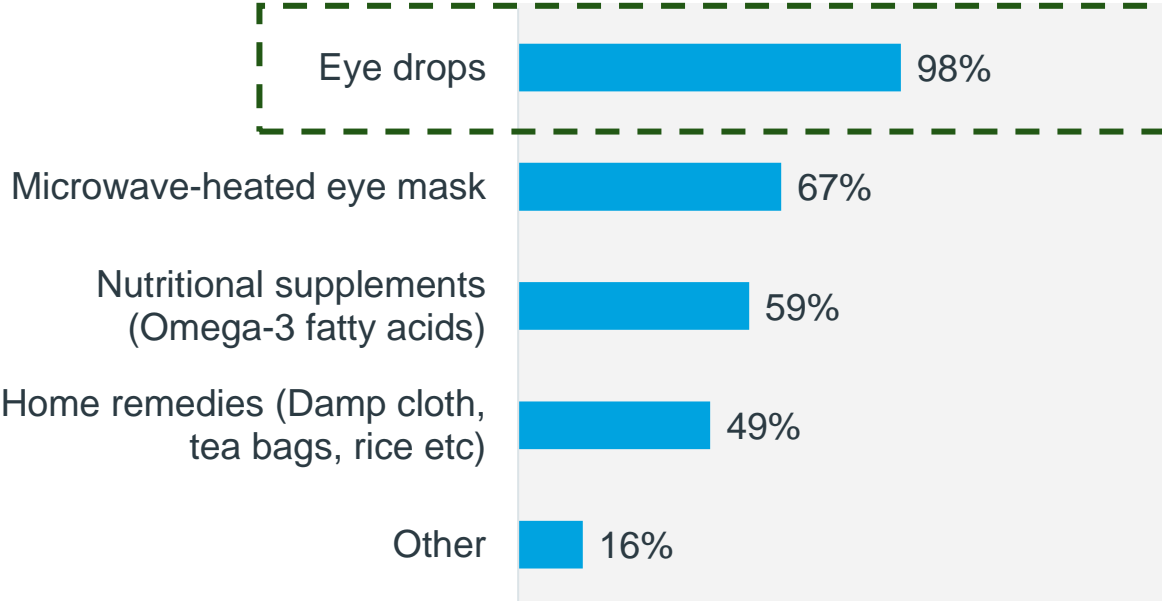
9 in 10 users of Dry Eye Mask have tried other treatment options before using it, with eye drops being the most common option. 2 in 3 users have also tried a microwave-heated eye mask prior to switching to Dry Eye Mask

*Treatment options used before Dry Eye Mask*

**Have you tried any other treatments before Dry Eye Mask?**



**Alternative treatments used for dry eye symptom relief**



Base: All respondents (N=273)  
Q3. Have you tried using any other treatments before Dry Eye Mask?  
Q4. And before using Dry Eye Mask to relieve your dry eye symptoms, which of the below treatments were you using?

A man with grey hair, wearing a blue button-down shirt, is sitting at a desk in a modern office. He is looking at a laptop screen and has his hand on the keyboard. The office has large windows and a glass partition in the background. The lighting is warm and focused on the man.

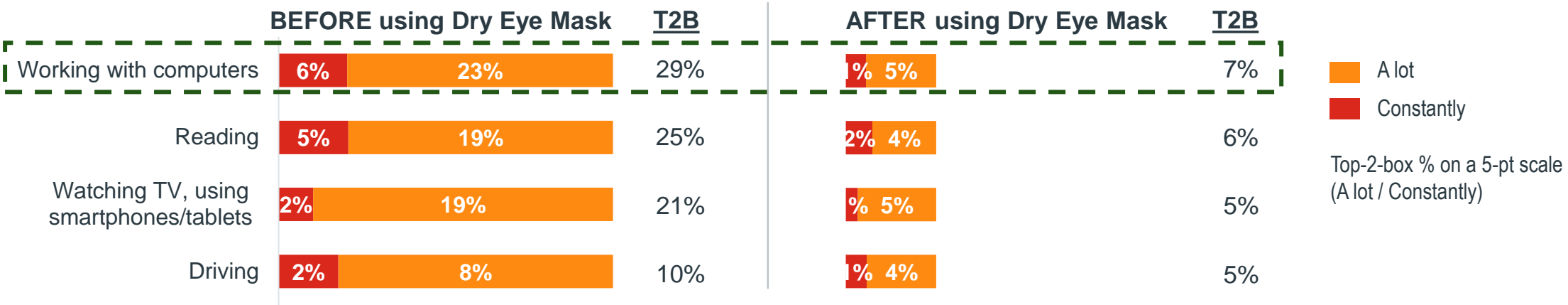
**Perceived  
Benefits & Dry  
Eye Mask  
Satisfaction**



# After using Dry Eye Mask, the negative impact of dry eye symptoms on top 3 affected activities (working on a computer, reading, watching TV/ using gadgets) have been reduced for more than half of users

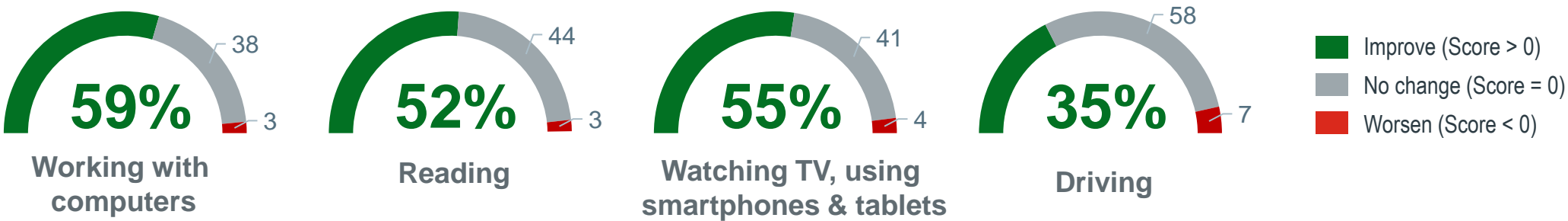
*Impact of dry eye on performing daily activities before and after using Dry Eye Mask*

## Degree of limitation in performing daily activities...



## Change in limitation of performing daily activities

Score = Impact rating before using dry eye mask – Impact rating after using dry eye mask



Base: All respondents (N=273)  
 Q2. **Before** using Dry Eye Mask, how much have your eye symptoms limited you in performing the following activities?  
 Q5. And **after** using Dry Eye Mask, how much have your eye symptoms limited you in performing the following activities?

**Most of the users of Dry Eye Mask report that all of the most common dry eye symptoms (e.g. burning eyes, dry/ gritty/ itchy eyes, painful or sore eyes, eye fatigue etc.) have improved after using it, usually within the span of 8 to 10 days**

*Improvement of dry eye symptoms after using Dry Eye Mask*

Eye Symptoms	Symptom change after using Dry Eye Mask	Average time taken for improvement (days)	Base
Burning eyes	85% Less often, 13% No change, 1% More often	9	N= 144
Dry/Gritty/Itchy eyes	84% Less often, 15% No change, 1% More often	10	N= 235
Painful or sore eyes	83% Less often, 15% No change, 2% More often	8	N= 135
Eye fatigue	82% Less often, 17% No change, 1% More often	9	N= 168
Blurred vision	76% Less often, 24% No change, 0% More often	8	N= 92
Eye redness	72% Less often, 27% No change, 1% More often	8	N= 138
Watery eyes	72% Less often, 24% No change, 4% More often	9	N= 96

■ Less often   ■ No change   ■ More often

Base: Respondents who claimed to have experienced mentioned dry eye symptoms (Respective bases are annotated in table above)

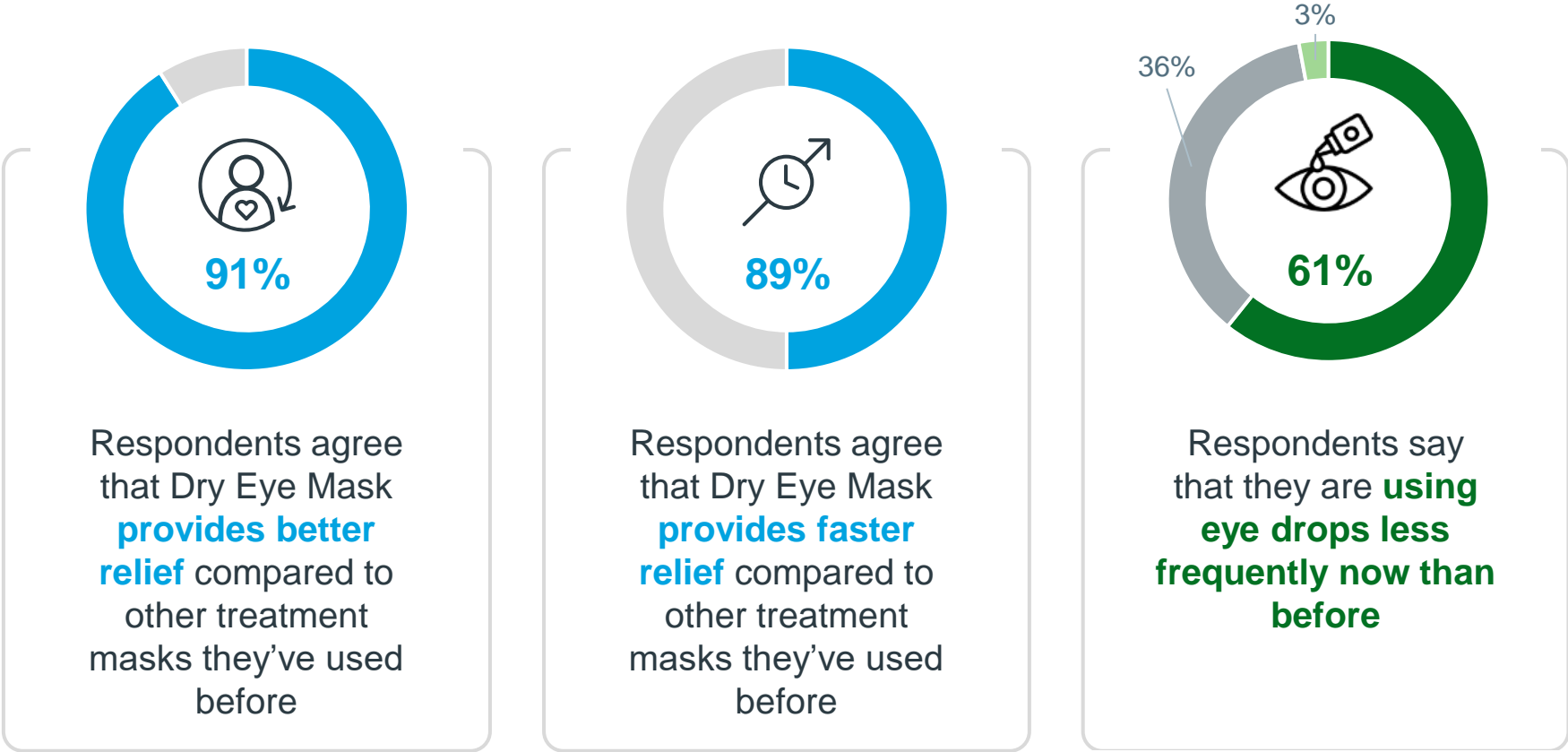
Q6. And after using Dry Eye Mask, how often do you still experience the dry eye symptoms you mentioned earlier?

Q7. How quickly after the first use of Dry Eye Mask did you experience an improvement in your dry eye symptoms?



# 9 in 10 respondents agree that Dry Eye Mask provides better and faster relief compared with other treatments. 3 in 5 respondents also claim that they are using eye drops less often than before now that they are using the Dry Eye Mask

Product benefit agreement – Comparison with other treatments



Showing Top 2 % on a 5-pt scale (Somewhat agree/ Strongly agree)

- Less often than before using Dry Eye Mask
- No change to before using Dry Eye Mask
- More often than before using Dry Eye Mask

Base: Respondents who have used microwave-heated masks before Dry Eye Mask (N=163); Respondents who have used eye drops to relieve dry eye symptoms (N=237)  
Q8. And how has your usage of eye drops changed since using Dry Eye Mask?  
Q9. Thinking of your experience using Dry Eye Mask, please rate to what extent do you agree or disagree with the below statements?

# Users of Dry Eye Mask show strongest agreement to convenience-related attributes of the product. At least 73% users agree that the product has improved their daily activity performance, quality of life and main symptom relief after using Dry Eye Mask

## Product benefit agreement

Showing Top 2 % on a 5-pt scale  
(Somewhat agree/ Strongly agree)

### Performance of daily activities

- 80% • With Dry Eye Mask, **I am able to enjoy regular activities** (using a computer or smartphone, reading, driving, watching TV)
- 79% • With Dry Eye Mask, I am able to do regular activities (reading, working, driving etc) **without worrying about dry eye symptoms or discomfort**
- 73% • With Dry Eye Mask, **I am able to work without interruptions**



### Symptom relief attributes

- 89% • Dry Eye Mask helps to relieve main symptoms effectively
- 59% • Since I used Dry Eye Mask, I look more fresh and less fatigued due to less eye redness



### Convenience

- 97% • Dry Eye Mask is **easy** to use
- 96% • Dry Eye Mask is **convenient** to use.

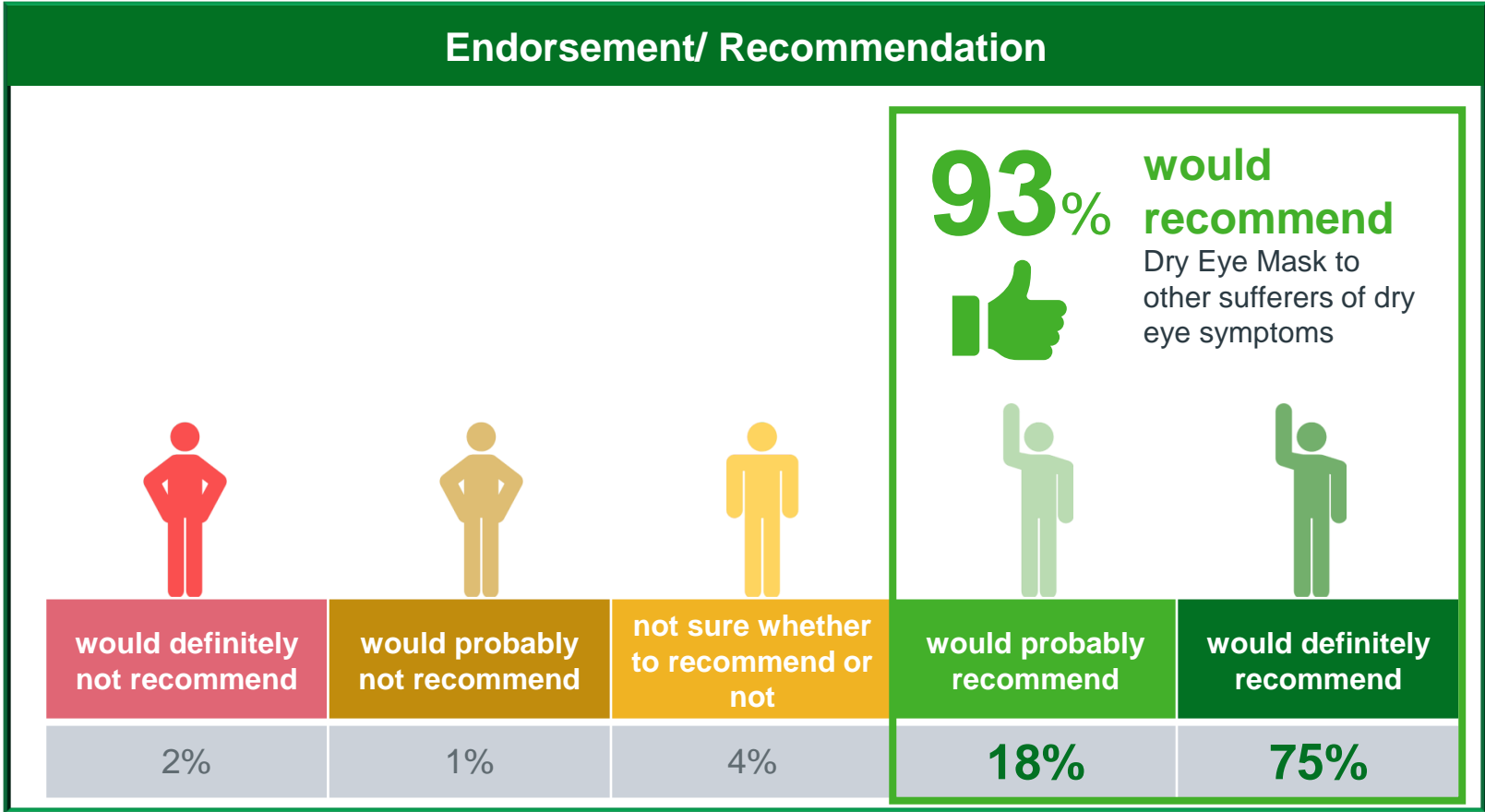
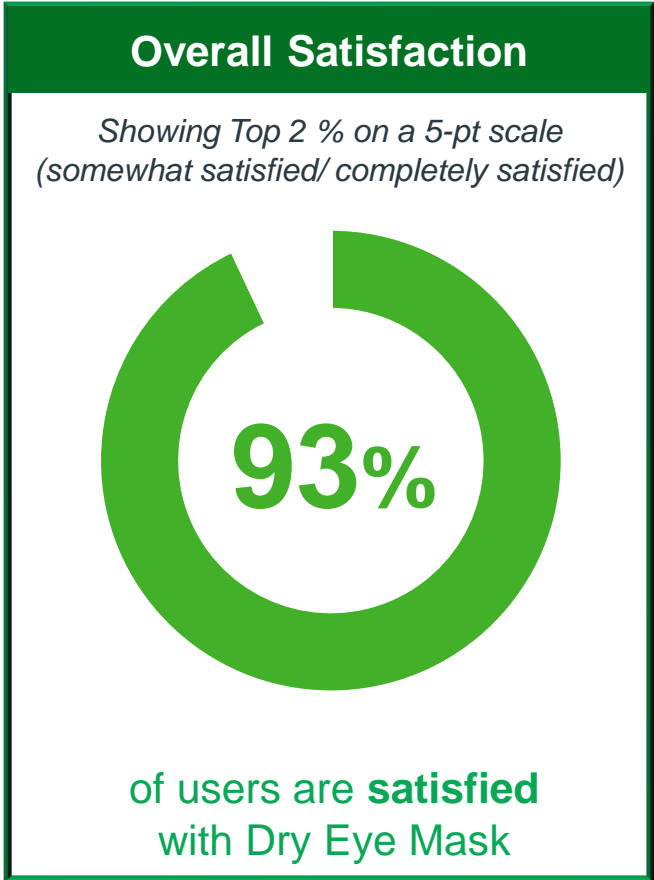


### QoL enhancement

- 78% • Since I used Dry Eye Mask, **my quality of life has improved**

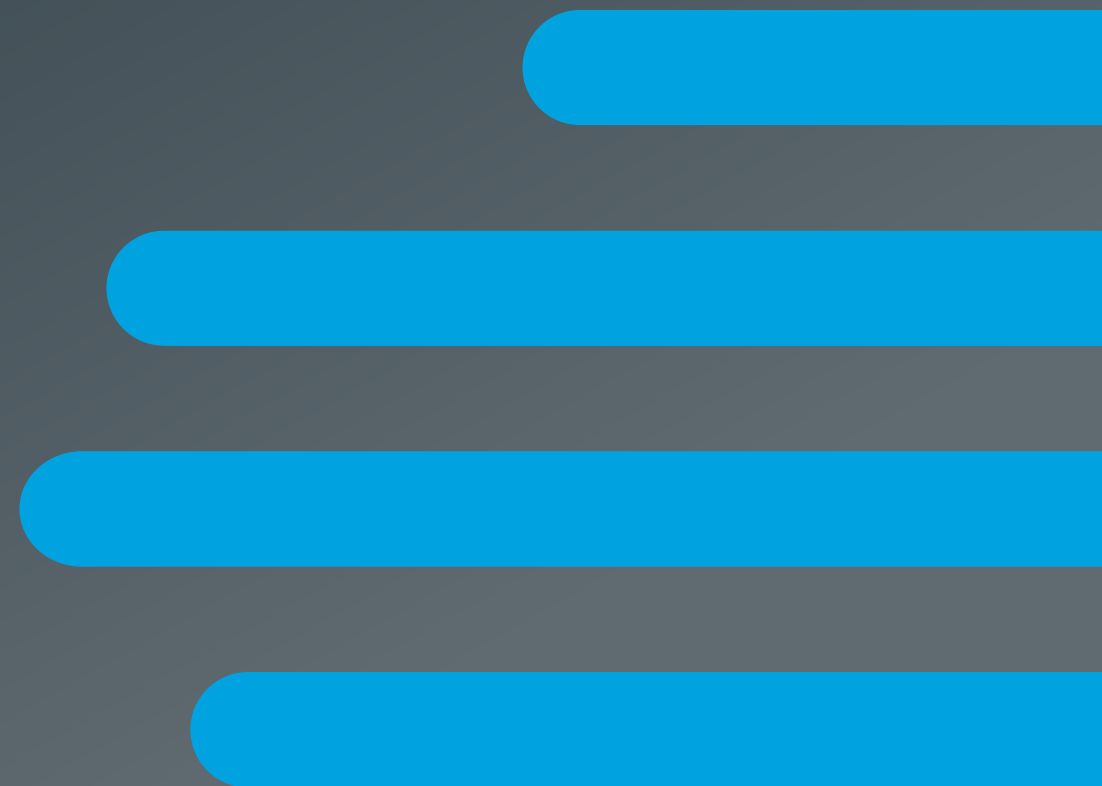
# An impressive 93% of the users are satisfied with Dry Eye Mask and the same proportion would recommend this product to other consumers who suffer from dry eye symptoms

*Overall satisfaction and recommendation intent*



Base: All respondents (N=273)  
 Q10. Thinking of your experience using Dry Eye Mask, how would you rate your overall satisfaction with Dry Eye Mask in treating your dry eye symptoms?  
 Q11. Lastly, based on your experience, how likely would you be to recommend Dry Eye Mask to other sufferers of dry eye symptoms?

# Summary and Way Forward



# Potential Claims for Activation for Dry Eye Mask



## Symptom relief

- **91%** respondents agree that Dry Eye Mask provides **better relief** compared to other treatment masks they have used before.
- **89%** respondents agree Dry Eye Mask provides **faster relief** compared to other treatment masks.
- **89%** respondents agree Dry Eye Mask helps them to relieve main symptoms effectively.
- **3 in 5** respondents agree that with Dry Eye Mask, they **look more fresh and less fatigued** due to less eye redness.
- **90% respondents** agree that Dry Eye Mask provides **better and faster relief than other treatment masks**.
- **4 in 5 respondents** claim they suffer less often from **burning eyes/ dry/ gritty/ itchy eyes/ painful or sore eyes/ eye fatigue**



## Satisfaction

- **93% of users are satisfied** with Dry Eye Mask
- **93% of users** would recommend Dry Eye Mask to other sufferers of dry eye symptoms



## Quality of Life/ Lifestyle

- **78%** respondents agree that their **quality of life has improved** since they started to use Dry Eye Mask
- **4 in 5 respondents** agree With Dry Eye Mask, they can **enjoy regular activities** (using a computer or smartphone, reading, driving, watching TV)
- **79%** claim that with Dry Eye Mask, they can do regular activities (reading, working, driving etc) **without worrying about dry eye symptoms or discomfort**
- **73%** agree that with Dry Eye Mask, they can **work without interruptions**.



## Convenience

- **97%** respondents agree Dry Eye Mask is **easy** to use.
- **96%** respondents agree Dry Eye Mask is **convenient** to use.
- **3 in 5 respondents** also claim they **use eye drops less often** now than before

# Appendix

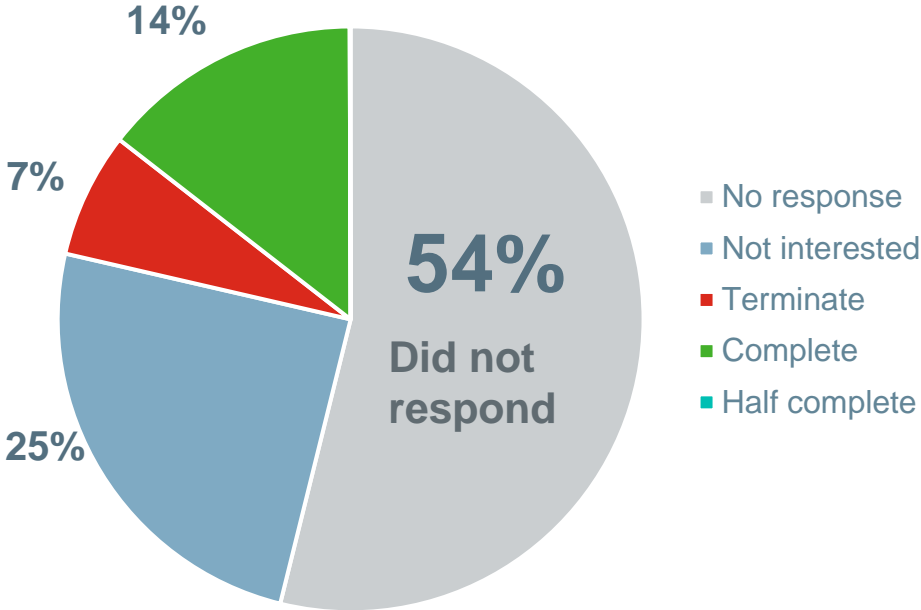
**(i) Rate of response to recruitment contact**

**(ii) Additional data tables**



# Only 46% of Dry Eye Mask clients responded to recruitment contact and only 14% successfully completed the survey

*Fieldwork response breakdown*



Contact outcome	Counts
No response received	1045
Not interested to participate	480
Terminated	134
Completes	280
Half complete	1
TOTAL	1940 respondents

# Significantly more male users purchase Dry Eye Mask upon family/friend's recommendation

## Purchase driver for Dry Eye Mask

	TOTAL	Male	Female	18-29 years old	30-44 years old	45-65 years old	Above 65 years old	Recent user	Long term user	Daily user	Occasional user
		A	B	C	D	E	F	G	H	I	J
Base	273	61	212	4	43	132	94	10	263	209	64
Doctor/ optometrist's recommendation	48%	52%	46%	100%	58%	42%	48%	40%	48%	49%	42%
Online research	46%	38%	48%	0%	42%	50%	44%	60%	45%	44%	50%
Family/ friend's recommendation	9%	16% <b>B</b>	7%	0%	14%	8%	9%	10%	9%	8%	13%
Traditional advertisement	7%	5%	8%	0%	2%	5%	13%	0%	8%	9%	3%
Other	4%	3%	4%	0%	0%	3%	7%	10%	4%	4%	3%

**\*\*Small sample size.**  
 N=4 (18-29 YO)  
 N=10 (Recent user)  
 Interpret with caution

# Female users reportedly first experienced dry eye symptoms significantly earlier compared to male respondents

## First experienced symptoms – Time

	TOTAL	Male	Female	18-29 years old	30-44 years old	45-65 years old	Above 65 years old	Recent user	Long term user	Daily user	Occasional user
		A	B	C	D	E	F	G	H	I	J
Base	273	61	212	4	43	132	94	10	263	209	64
Mean (In years)	7.1	4.7	7.7 <b>A</b>	2.2	4.9	7.4	7.8	5.5	7.1	7.4	5.9
Standard Deviation	8.4	5.6	8.9	1.0	5.4	8.0	9.9	6.2	8.4	8.8	6.5

**\*\*Small sample size.**  
 N=4 (18-29 YO)  
 N=10 (Recent user)  
 Interpret with caution

Base: All respondents (N=273)  
 S4. How long have you been using Dry Eye Mask?

Capital letter indicates significantly higher than other group on 95% confidence level

# Significantly more male users suffer from watery eyes whereas more females suffer from blurred vision compared to their subgroups

*Dry eye symptoms experienced before use of mask*

	TOTAL	Male	Female	18-29 years old	30-44 years old	45-65 years old	Above 65 years old	Recent user	Long term user	Daily user	Occasional user
		A	B	C	D	E	F	G	H	I	J
Base	273	61	212	4	43	132	94	10	263	209	64
Dry/Gritty/Itchy eyes	86%	84%	87%	100%	91%	89%	80%	90%	86%	87%	84%
Eye fatigue	62%	52%	64%	75%	63%	64%	56%	60%	62%	59%	70%
Burning eyes	53%	46%	55%	50%	51%	61% <b>F</b>	43%	50%	53%	54%	50%
Eye redness	51%	44%	52%	25%	49%	57%	44%	40%	51%	53%	44%
Painful or sore eyes	49%	48%	50%	0%	53%	52%	47%	60%	49%	50%	47%
Watery eyes	35%	48% <b>B</b>	32%	0%	23%	40%	35%	50%	35%	35%	34%
Blurred vision	34%	23%	37% <b>A</b>	0%	35%	35%	33%	40%	33%	32%	39%

**\*\*Small sample size.**  
 N=4 (18-29 YO)  
 N=10 (Recent user)  
 Interpret with caution

Base: All respondents (N=273)  
 S6. Have you experienced any of the following eye symptoms before using Dry Eye Mask?

Capital letter indicates significantly higher than other group on 95% confidence level

# Significantly more female users have tried alternative treatment options prior to Dry Eye Mask use compared to male users whereas significantly more male users have not

## Other treatments used before dry eye mask

	TOTAL	Male	Female	18-29 years old	30-44 years old	45-65 years old	Above 65 years old	Recent user	Long term user	Daily user	Occasional user
		A	B	C	D	E	F	G	H	I	J
Base	273	61	212	4	43	132	94	10	263	209	64
Yes	89%	80%	92% <b>A</b>	50%	84%	92% <b>C</b>	88%	100%	89%	88%	94%
No	11%	20% <b>B</b>	8%	50% <b>E</b>	16%	8%	12%	0%	11%	12%	6%

**\*\*Small sample size.**  
 N=4 (18-29 YO)  
 N=10 (Recent user)  
 Interpret with caution

# Significantly more female users experience strong negative impact of dry eye symptoms when they are reading and working with computers

Impact of dry eye on QOL before using Dry Eye Mask (Top 2 summary)

	TOTAL	Male	Female	18-29 years old	30-44 years old	45-65 years old	Above 65 years old	Recent user	Long term user	Daily user	Occasional user
		A	B	C	D	E	F	G	H	I	J
Base	273	61	212	4	43	132	94	10	263	209	64
Working with computers	29%	16%	32% <b>A</b>	50%	40%	29%	22%	20%	29%	26%	36%
Reading	25%	11%	28% <b>A</b>	25%	28%	24%	23%	40%	24%	26%	20%
Watching TV, using smartphones/tablets	21%	13%	24%	50%	26%	21%	18%	10%	22%	22%	19%
Driving	10%	8%	11%	25%	7%	13%	7%	0%	11%	9%	14%

Top-2-box % on a 5-pt scale (A lot / Constantly)

**\*\*Small sample size.**  
 N=4 (18-29 YO)  
 N=10 (Recent user)  
 Interpret with caution

Base: All respondents (N=273)  
 Q2. **Before** using Dry Eye Mask, how much have your eye symptoms limited you in performing the following activities?

Capital letter indicates significantly higher than other group on 95% confidence level





**Notably, significantly more 30–44-year-old users reported improvement in working with computers following Dry Eye Mask use compared to those above 65 years old (as shown by higher improvement proportion and mean score)**

*Overall impact change after using Dry Eye Mask – Working with computers*

	TOTAL	Male	Female	18-29 years old	30-44 years old	45-65 years old	Above 65 years old	Recent user	Long term user	Daily user	Occasional user
		A	B	C	D	E	F	G	H	I	J
Base	273	61	212	4	43	132	94	10	263	209	64
-3.00	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
-1.00	2%	2%	2%	0%	2%	2%	2%	0%	2%	1%	5%
.00	38%	46%	36%	25%	23%	36%	49% <b>D</b>	40%	38%	40%	34%
1.00	32%	30%	33%	50%	33%	33%	29%	40%	32%	33%	30%
2.00	23%	21%	24%	25%	37%	23%	17%	10%	24%	23%	23%
3.00	3%	2%	4%	0%	5%	5%	1%	10%	3%	2%	6%
4.00	1%	0%	1%	0%	0%	1%	1%	0%	1%	0%	2%
Improve (Score>0)	59%	52%	61%	75%	74% <b>F</b>	61%	48%	60%	59%	58%	61%
No change (Score=0)	38%	46%	36%	25%	23%	36%	49% <b>D</b>	40%	38%	40%	34%
Worsen (Score<0)	3%	2%	3%	0%	2%	2%	3%	0%	3%	2%	5%
Mean	0.9	0.8	0.9	1.0	1.2 <b>F</b>	0.9	0.6	0.9	0.9	0.8	1.0
Standard Deviation	1.0	0.9	1.0	0.8	0.9	1.0	1.0	1.0	1.0	0.9	1.1

Base: All respondents (N=273)

Q2. **Before** using Dry Eye Mask, how much have your eye symptoms limited you in performing the following activities?

Q5. And **after** using Dry Eye Mask, how much have your eye symptoms limited you in performing the following activities?

**\*\*Small sample size.**  
N=4 (18-29 YO)  
N=10 (Recent user)  
Interpret with caution

Capital letter indicates significantly higher than other group on 95% confidence level

# Female users express significantly stronger agreement that Dry Eye Mask provides faster and better relief compared to other treatment masks they've used before

## Product benefit agreement (Top 2 summary & mean summary)

### Top 2 summary

	TOTAL	Male	Female	18-29 years old	30-44 years old	45-65 years old	Above 65 years old	Recent user	Long term user	Daily user	Occasional user
		A	B	C	D	E	F	G	H	I	J
Base	163	34	129	2	26	84	51	5	158	127	36
Dry Eye Mask provides faster relief compared to other treatment masks I've used before.	89%	74%	93% <b>A</b>	100%	77%	90%	92%	100%	89%	90%	86%
With Dry Eye Mask, I am able to enjoy regular activities (using a computer or smartphone, reading, driving, watching TV).	80%	82%	79%	100%	81%	81%	77%	60%	81%	79%	81%

Top-2-box % on a 5-pt scale  
(Somewhat agree / Completely agree)

### Mean summary

Dry Eye Mask provides faster relief compared to other treatment masks I've used before.	4.4	4.1	4.5 <b>A</b>	5.0	4.0	4.5	4.5	4.6	4.4	4.4	4.4
Dry Eye Mask provides better relief compared to other treatment masks I've used before.	4.5	4.2	4.6 <b>A</b>	5.0	4.4	4.5	4.5	4.8	4.5	4.5	4.6

**\*\*Small sample size.**  
N=2 (18-29 YO)  
N=26 (30-44 YO)  
N=10 (Recent user)  
Interpret with caution

Base: Respondents who have used microwave-heated masks before Dry Eye Mask (N=163), scale from negative to positive  
Q9. Thinking of your experience using Dry Eye Mask, please rate to what extent do you agree or disagree with the below statements?

Capital letter indicates significantly higher than other group on 95% confidence level