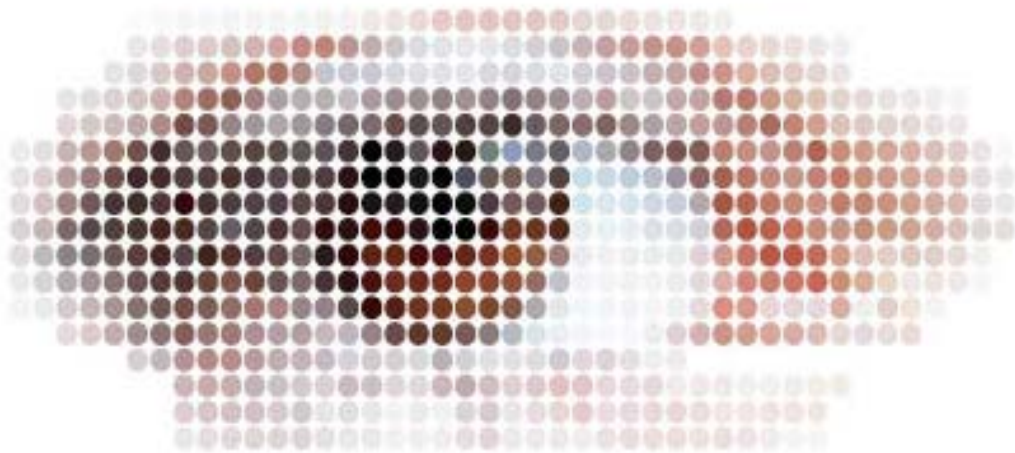


INSIGHT SURVEY SERIES



Johnson OPTICAL
RESEARCH

2014 ADULT CONSUMER EYE EXAM EXPERIENCE



Insight Survey

2014 Adult Consumer Eye Exam Experience

June 2014 Data

Trended with

March 2008, 1Q 2009 March 2010, March 2011, June 2012 & June 2013
data wherever possible

Data Usage Policy

The data contained in this report is for *internal* use only. Any *external* use must be approved in advance by Jobson Medical Information LLC.

If you have any questions please call Jennifer Waller at (212) 274-7164 or email jwaller@jobson.com.

Jobson Medical Information LLC
Research Department

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- Introduction
- Topline Summary
- At your last, most recent eye exam, were you asked:
 - to provide information on your general health?
 - about your eye health?
 - about your current vision problems or status?
 - about medications you may be taking?
 - about allergies you may have?
 - about your family vision history?
 - about your family general health history?
 - about your occupational vision needs?
 - about your avocational vision needs (i.e., sports, reading, computer games)?
- At any time during your most recent exam experience:
 - did the doctor or clinician explain the exam procedures to you?
 - did the doctor or clinician review your eye health and visual status with you?
 - did the doctor or clinician explain available options and treatments for your eye care health and vision needs?
 - did the doctor or clinician recommend a course of eye health treatment or vision correction and reasons for the recommendation?
 - were you referred to another physician or health care provider for further evaluation?
 - were you asked about your managed vision care plan or health care plan?
 - were you told about any applicable discounts to the exam fee due to your health or vision care plan?
- Who performed your eye exam?

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- At your most recent eye exam, did the doctor or clinician:
 - check your *vision distance with* your then current eyeglasses/contacts with the use of charts and medical equipment?
 - check your *vision distance without* your then current eyeglasses/contacts with the use of charts and medical equipment?
 - check your *near vision without* your then current eyeglasses/contacts with the use of charts and medical equipment?
 - check your peripheral (at or near the edge or outside) vision acuity?
 - check your color vision (identifying colors)?
 - perform a glaucoma test?
 - dilate your eyes (pupillary dilation)?
- Following this eye exam, when were you recommended to have your next exam?
- What was the fee for your exam? Exclude all promotional discounts, health care plans, or other price reductions.
- Which of the following statements best describes how your vision insurance, employee discount program, or health plan helped you pay for your most recent eye exam? (cost of the eye exam only)
- Thinking about the different aspects of your last eye exam experience, how would you rate, where 1 means strongly disagree, and 5 means strongly agree:
 - Exam was fast, efficient.
 - Exam was comfortable, not stressful.
 - Exam was thorough.
 - Exam was pleasant, enjoyable.
 - Exam was physically painful.
 - Exam fee was too expensive.
 - Exam was good value compared to fee.
 - Overall, the eye exam contributed to my visual *health* needs.
 - Overall, the eye exam contributed to my visual *correction* needs.
 - Overall, I was satisfied with the eye exam experience.
 - Overall, I believe the eye exam experience provided accurate results.

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- How likely are you to have your next eye exam at the same place as your last?
- Which one item would most prevent you from returning to this same place in the future to have your eyes examined?
- **Tabs for Independent vs. Chain**

Methodology

- The objective of the Adult Consumer Eye Exam Experience Insight Survey was to capture consumer perceptions and attitudes toward the eye exam experience, a key touch-point in the consumer eye care/wear process. In addition, the perceptions of recent exam consumers who reported they participated in a vision care plan were included.
- The Adult Consumer Eye Exam Experience Insight Survey was fielded in June 2014, as part of the Vision Council's VisionWatch consumer study. This custom slot study was completed by a total of 2,961 consumers who had had an eye exam in the last 6 months, and weighted to reflect national demographics of adults (18+) across gender, age, household income and other U.S. Census parameters.
- The data is broken out by those who had an eye exam in the last 6 months at an independent (working sample size 1,279) and those who had an eye exam in the last 6 months at a chain (working sample size 1,682). Also included are year on year comparisons of 2008 to 2014 data. The same survey was fielded in March 2008, 1Q 2009, March 2010, March 2011, June 2012 and June 2013
- The questionnaire, comprising the Adult Consumer Eye Exam Experience Insight Survey, was primarily based on the American Optometric Association (AOA) guide *Optometric Clinical Practice Guideline: Comprehensive Adult Eye and Vision Examination*. This reference guide was approved by the AOA Board of Trustees May 1, 1994, second edition 1997 publication.

Introduction

- As a preface, the AOA guidelines state that “eye care serves as an important point of entry into the health care system because:
 - Virtually all people need eye care at some time in their lives
 - By its very nature, eye care provides for the evaluation, assessment, and coordination of a broad spectrum of health care needs
 - Eye care is a non-threatening form of health care, particular to patients who are reluctant to seek general or preventive medical care.”
- This study measures the consumers’ perceptions and attitudes surrounding the eye exam experience. It provides significant value in assisting professionals, practices, retailers and suppliers in assessing not just their performance, but also their ability to effectively communicate with their patients who are also their customers. The answers consumers provide in this study reflect their perceptions. And to be a successful practitioner or retailer it is important to understand that where the consumer is concerned to a meaningful degree ‘perception is reality.’