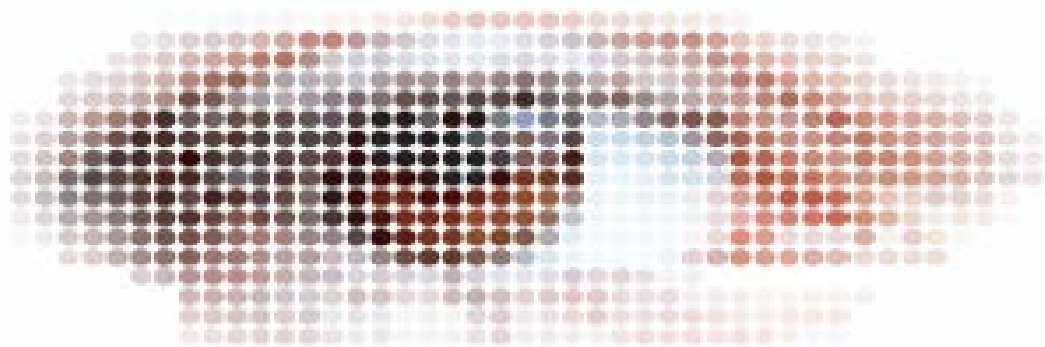


INSIGHT SURVEY SERIES



2014 EYEWEAR AND EYE CARE CONSUMER PATTERNS



Data Usage Policy

- The data contained on this electronic file 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 Zupnick at (212) 274-7164.

Jobson Medical Information LLC

- Research Department

Table of Contents

- Objectives
- Methodology
- Executive Summary
- Detailed Findings
- Did you purchase your eyeglasses at the same location or retailer at which you had your eyes examined?
- Did you know which optical retailer you would purchase the eyeglasses from before starting to shop and look for them?
- Did you purchase your eyeglasses from the retailer you first walked into when looking for eyeglasses that time?
- Approximately how many optical retailers did you walk into before purchasing the eyeglasses?
- Approximately how long in minutes and hours (including multiple trips), did you spend in the optical retail location from which you purchased the eyeglasses before making your selection? (Please include consultation with the dispenser, but do not include time spent for an eye exam.)
- Did you purchase?
- Did you take advantage of a promotion, a coupon, a discount, or a special sale when making your eyeglass purchases?
- If yes, what was the promotion, coupon, or special?
- Which did you select first, the eyeglass frame or the lenses for the eyeglass frame?
- Think about the primary pair of eyeglasses you purchased. Which was the more important decision for you?
- How do you rate the sales assistance the dispenser gave you in picking out your eyeglasses?
- How important was the optical dispenser in making your final decision?
- When making your eyeglass purchase decision, did you have a friend or family member along to assist you in making a purchase decision?
- How important was the opinion of your friend or family member in making your final decision?
- How helpful did you find the posters, pictures, and eyeglass frame displays in assisting you to make a purchase decision about the eyeglass frames?
- How helpful did you find posters, brochures, and demonstrators in assisting you to make a decision about the lenses?
- When making your purchase of the eyeglasses, did you think you had too much information, about the right amount, not enough information, or don't know?
- Did you use that insurance for an exam, eyeglasses/sunglasses, both exam and eyeglasses/sunglasses, did not use or don't know?

Objectives

- The objective of this study is to better understand the factors that affect consumers' eyeglass and lens purchasing decisions
- Specifically, the report:
 - Assesses consumers' buying experience
 - Determines how many optical retailers consumers visit before making purchasing decisions and how long it takes to make a purchase decision
 - Measures the importance of the various factors that contribute to consumers' purchasing decisions, including:
 - The assistance of the optical dispenser
 - Input from friends and family members
 - Point of purchase displays
 - Promotions
 - Analyzes use of vision care insurance
 - Compares six years of data, where available

Methodology

- **This sample was derived from the U.S. population as part of the syndicated VisionWatch study. Only respondents who wear prescription eyeglasses or prescription sunglasses were asked to participate in this custom section, yielding a working sample of 6,245.**
 - **Consumers were recruited by email and the questionnaire was completed via the Internet**
 - **Data collection was conducted in Feb 2014**
- **This survey consisted of approximately 20 questions and was attached to the end the VisionWatch standard questionnaire**
- **Data is compared to the same survey fielded in March 2009, Jan/Mar 2010, January 2011, March 2012, March 2013 and Feb 2014**
 - **Sample sizes are as follows:**
 - March 2009: n= 3,409**
 - Jan/Mar 2010: n= 4,230**
 - January 2011: n=6,041**
 - March 2012: n=5,842**
 - March 2013: n=6,775**
 - Feb 2014: n=6,245**