

TOPLINE REPORT

VSP National Consumer Vision Care Study
Report Date: April 2007
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Objectives:

Obtain national prevalence data related to vision insurance and consumer eye care patterns for children and adults. With children, specifically focus on the age groups Under 6, 6 to 11 and 12 to 17.

Specific areas of focus:

- Prevalence of OD/MD exams ever and within the last 12 months -- per age group
- Frequency an Rx was needed at the first eye exam for children (asked for under age 6)
- Where parents would feel most comfortable taking their children for an eye exam
- Compare bullet above to where adults expect to find the best care to ensure receiving a thorough eye exam.
- Compare where adults expect to find the best care, with location of most recent exam and with quality ratings of exam locations by delivery channel.
- How incidence of kids having eye exams varies with insurance status
- How incidence of having eye exams compares with incidence of having dental check-ups
- Time with video games, TV and Computers among school age children
- Most important sense as rated by adults
- Indicators of Computer Vision Syndrome among adults
- Percentage adults who say they could probably use Rx glasses but don't use them now or get by using readers.
- Usage of vision correcting when driving compared with those requiring vision correction

Note: Reporting follows the above sequence

Screening Criteria:

- A representative independent sample of consumers by age, income and gender within the four major U.S. census regions.

Key Findings:

Question:	Percent
Eye exams (OD or MD) ever?	
n= 180 Under age 6	17%
n= 138 Age 6 - 11	56%
n= 152 Age 12 - 17	77%
n= 470 Sub-17	48%
n= 1,285 Adults	98%

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Question:		
Eye exams (OD or MD) Last Twelve months?		Percent
n= 180	Under age 6	10%
n= 138	Age 6 - 11	43%
n= 152	Age 12 - 17	57%
n= 470	Sub-17	35%
n= 1,285	Adults	54%

Question:		
Frequency an Rx was needed at first eye exam (of those who had an exam)?		n = 30
	Under age 6	20%

* The small size of this sub-sample requires this data to be treated as qualitative. For instance, while there were 180 children in this age group, only 30 of those (17%) had an eye exam ever by an OD or MD, and of those, 2 in 10 needed a prescription (20%) at their first eye exam.

Question:		
Where parents would feel most comfortable taking their children for an eye exam?		n= 242 19% parents
	Corp. eye care chain	14%
	Within a dept. store	2%
	Mass Merchandiser	7%
	Kaiser or similar	2%
	*Private OD or MD	76%

Question:		
Where adults would expect to find the best care to ensure receiving a thorough eye exam?		n= 1,285 Full Sample
	Corp. eye care chain	10%
	Within a dept. store	2%
	Mass Merchandiser	3%
	Kaiser or similar	2%
	*Private OD or MD	83%

*Compare the above findings to the previous table to note that while more adults expect to find the best care at a private OD or MD, fewer parents take comfort in taking children to that type of location.

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Question:	
Where did you have your most recent eye exam (among adults who have ever had an exam)?	n= 1,260 98% adults
Corp. eye care chain	15%
Within a dept. store	2%
Mass Merchandiser	7%
Kaiser or similar	3%
*Private OD or MD	73%

*Compare the above findings to the previous table to note that while more adults expect to find the best care at a private OD or MD, where adults actually seek care does not correspond to where they believe they will receive the best care. This, in turn, could be evaluated against eye sight being reported as the most important sense to demonstrate inconsistent decision making on the part of adults (e.g, If eye sight is the most important sense and you expect to find the best care at an independent, then why not consistently seek independents for that care?)

Question:	
How incidence of kids having eye exams by a qualified OD or MD within the last 12 months (LTM) varies by insurance status?	Kids n=470 Insured n=276 Uninsured n=194
Children (under age 18)	36% vs. 32%

Question:	
How incidence of kids ever having eye exams (OD or MD) compares with kids ever having a dental check-up?	Kids n=470
Kids (under 18) eye exams	48%
Kids (under 18) dental exams	70%

Question:	
Plays video games, watches TV, or uses a computer for a combined average (home and school) of 4 hours or more per day?	Kids Age 6-11 n=138 Age 12-17 n=152
Kids (age 6 to 11)	23%
Kids (age 12-17)	44%
All School Age Children	34%

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Question:	
Adults rating eye sight as their most important sense?	n=1,285
Eye sight	90%
Hearing (2nd across the board)	5%

Question:	
Adults indicating symptoms of computer vision syndrome (CVS) -- At anytime throughout your working day do you experience eyestrain, dry eyes, headaches or something similar that you think could be related to your vision?	n=1,285
Yes	35%

Question:	
Percentage of adults reporting they could probably use prescription glasses or contacts but don't use them now or get by using over-the-counter readers?	n=1,285
Could probably use Rx eyewear but don't	4%
Get by using over-the-counter	7%
Combined	11%
I have good vision / don't need	13%
I had laser and no longer need	3%
Total not in Rx Eyewear	27%
I wear Rx glasses at least occasionally	58%
I wear Rx contact lenses at least occasionally	13%
Have had laser vision correction but still need Rx glasses	2%
Have had laser vision correction but still need Rx contact lenses	1%
Total wear Rx eyewear?	74%

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Question:	
Do you routinely wear Rx glasses or contacts when you drive (Base: Need Rx eyewear)?	n=944
Yes	84%