

HIGHLIGHTS

2001 AOA Optical Dispensing Survey¹

o Patients receiving Prescriptions. During 2000, seven out of every ten patients who received an eye examination (including refraction) also received a new spectacle or contact lens prescription (either for the first time or a change in a previous Rx). About one in five of the patients did not receive a new or changed Rx (e.g., the previous Rx was adequate), while about 10 percent did not require a prescription. Optometrists estimated that, on average, 14.3 percent of the examined patients for whom an Rx's were written took the prescriptions elsewhere to have them filled. This percentage has remained relatively constant over the years.

1. Patients Receiving Prescriptions/Rx's Filled Elsewhere, Mean Percent, 1992-2000

Category	1992	1994	1998	2000
Received new Rx	69.1%	69.3%	69.5%	69.9%
Did not receive new Rx	20.0%	20.3%	20.3%	20.3%
Did not require Rx	10.9%	10.4%	10.2%	9.8%
All patients examined	100.0%	100.0%	100.0%	100.0%
Rx's filled elsewhere	11.9%	11.5%	12.7%	14.3%

o Display Frames Returned. Survey respondents estimated that 14.8 percent of their display frames during 2000 were returned to suppliers. This compares to 14.5 percent in 1998 and 13.1 percent returned in 1994. ODs return most frames for style-related reasons.

2. Reasons for Return of Display Frames to Suppliers, Mean Percent, 1994-2000

Reason for Return	1994	1998	2000
Style	35.7%	39.0%	37.2%
Discontinued	23.1%	23.4%	25.0%
Obsolescence	20.2%	19.9%	16.6%
Quality	15.9%	10.2%	13.8%
Other	5.1%	7.5%	7.4%
All reasons	100.0%	100.0%	100.0%

¹ Responses are for calendar year 2000. A random sample of 4,000 AOA members were sent a copy of this survey in January 2001. The response rate was 14.1 percent. The last version of this survey was taken in 1999 and was entitled the "1999 AOA Optical Dispensing Survey."

o **Cost of Displayed Frames.** Most of the frames that comprised the frame display in 2000 fell within a cost range to the optometrist of \$45 to \$80 dollars. Moreover, 15.4 percent of frames displayed included clip-on sunglasses.

3. Cost of Frames in Frame Displays, Mean Percent, 1998-2000

Cost Interval of Frames	Percent Each Interval-1998	Percent Each Interval-2000
\$15 or less	8.6%	8.0%
\$15.01 to \$45.00	31.4%	29.4%
\$45.01 to \$80.00	40.3%	41.7%
\$80.01 or more	19.7%	20.9%
All cost intervals	100.0%	100.0%

o **Mix of Displayed Frames.** Optometrists reported that, on average, about one in five displayed women's frames were plastic. Plastic frames comprised a smaller share of the displayed frames for men and for children.

4. Mix of Displayed Frames, by Type and Patient Category, Mean Percentage, 2000

Patient Category	% Plastic	% Metal/Rimless
Men	16.5 %	83.5%
Women	20.8 %	79.2 %
Children	13.9 %	86.1 %

o **Selection of Frame Vendor.** Optometrists were asked to rate the factors most important in the selection of a frame vendor. ODs were asked to consider (on a scale of 1-10, with 10 being the rating of highest importance) such factors as price/cost of frames, quality, styling, range of products and frame lines, and vendor relationships. Survey respondents indicated that quality and styling were the more significant factors, while price/cost and range of products/frame lines were less important in selecting a frame vendor.

5. Factors Important in the OD Selection of Frame Vendors

Factor (1=Least/10=Most Important)	Median Rating
Price/cost	7
Quality	9
Styling	9
Range of Products & Frame Lines	7
Vendor Relationship	8

o **Lens Type/Materials.** The 2001 Optical Dispensing Survey continues to demonstrate change in both the types and materials of the eyeglass lenses dispensed in OD offices. Single vision and trifocal lenses remain virtually unchanged in the market share, while progressive lenses continue to gain share at the expense of bifocals. The importance of polycarbonate and high index plastic lenses continues to grow, particularly polycarbonates.

6. Lenses Dispensed by Type, Mean Percent, 1994-2000

Lens Type	1994	1998	2000
Single vision	43.7%	43.0%	44.2%
Bifocal (non-progressive)	30.3%	24.3%	20.2%
Trifocal (non-progressive)	6.6%	6.1%	6.1%
Progressive	19.4%	26.6%	29.5%
All types	100.0%	100.0%	100.0%

7. Lenses Dispensed by Material, Mean Percent, 1994-2000

Lens Material	1994	1998	2000
Glass	13.5%	8.1%	5.8%
Plastic (excl. High Index)	63.4%	58.1%	51.0%
Plastic (High Index)	11.3%	15.3%	16.5%
Polycarbonate	11.8%	18.4%	26.7%
All materials	100.0%	100.0%	100.0%

o **Lens Treatment.** The percentage of lenses dispensed by type of lens treatment in 2000 increased for most categories except for tinted (ex. photochromic) lenses, which continued to decline. The percentage for photochromic lenses was essentially unchanged.

8. Eyeglass Lenses Dispensed with One or More Treatments, Mean Percent, 1994-2000

Type of Lens Treatment	1994*	1998*	2000*
Scratch-resisting coating	60.4%	63.1%	69.1%
Ultra-violet coating	32.6%	34.2%	38.1%
Tinted lenses (ex. photochromic)	34.9%	24.0%	18.0%
Photochromic lenses (incl. Transitions, glass photochromics, etc.)	14.4%	22.7%	22.4%
Anti-reflective coating	11.0%	16.0%	24.9%
Polarized lenses	2.9%	4.3%	7.1%

* Totals can exceed 100 percent

o **Who Recommends Lens Options.** The office person or persons who most frequently initially mentioned (suggested, recommended, requested) lens and/or lens treatment options during 2000 varied widely depending on the option.

9. Who Recommends Lens Options to Patients, Mean Percent, 2000

Type & Treatment Options	OD Only	Staff Only	OD & Staff	Patient	OD & Patient	Staff & Patient	OD, Staff & Patient
Progressive lenses	10.0%	0.4%	73.0%	0.7%	8.3%	1.6%	6.0%
Polycarbonate lenses	10.6%	8.0%	76.8%	0.4%	2.2%	0.9%	1.1%
High index lenses	10.6%	6.2%	73.8%	0.6%	2.6%	2.7%	3.5%
Photochromic	4.4%	6.4%	49.6%	9.5%	10.0%	14.3%	5.8%
Tinted lenses	4.4%	12.0%	42.0%	14.8%	7.9%	15.0%	3.9%
Polarized lenses	11.4%	11.1%	53.0%	8.7%	5.3%	7.2%	3.3%
Anti-reflective coating	8.1%	6.2%	72.5%	2.9%	2.9%	3.9%	3.5%
Ultra-violet coating	13.6%	9.4%	61.1%	4.1%	2.0%	2.8%	2.0%
Scratch-resistant coating	4.6%	18.7%	60.0%	1.5%	2.0%	9.4%	3.8%

o **Polycarbonate Lens Recommendations.** Optometrists reported that, on average, they recommended polycarbonate lenses to 87.3 percent of their pediatric patients (ages 0-18 years) who required a spectacle prescription. On average, ODs recommended polycarbonate lenses to 91.7 percent of their monocular and amblyopic patients who required a spectacle Rx. About 34.3 percent of OD Medicaid pediatric patients filled their spectacle prescriptions with polycarbonate lenses, while 73.5 percent of non-Medicaid pediatric patients did so. Four out of five ODs (80.5 percent) noted that non-Medicaid patients are charged an additional amount for single vision polycarbonate lenses compared to hard resin (CR-39) lenses. Two of five optometrists (43.5 percent) surveyed reported that their state's Medicaid program covers polycarbonate lenses, if such lenses are recommended by the doctor.

o **In-Office Lens Finishing.** Optometrists were asked to identify the types of in-office finishing, if any, they performed in their practices. Approximately 58.3 percent reported that they did some eyeglass finishing in 2000, compared to 60.0 percent in 1998. Lens tinting and lens edging remained the most commonly performed activities, while lens surfacing and lens casting were performed by far fewer optometrists.

9. ODs Who Perform In-Office Finishing, Mean Percent, by Procedure, 2000*

Procedure	Yes
Lens tinting	58.3 %
Lens edging	47.2%
Coating for ultra-violet	46.3%
Coating for scratch-resistance	22.2%
Lens surfacing	8.7%
Lens casting	5.0%

10. Mean Percent Lenses Dispensed by Procedures, 2000*

Procedure	Mean % Lenses Dispensed
Lens tinting	61.8%
Lens edging	66.3%
Coating for ultra-violet	58.4%
Coating for scratch-resistance	44.3%
Lens surfacing	24.1%
Lens casting	11.0%

* Totals may exceed 100 percent

o **Return Time for Eye Examinations.** Respondents reported an average of 16.6 months between complete (comprehensive) eye examinations (including refractions) for their established patients. The median number for this interval was 18 months. Most ODs (50.4 percent) reported that the return time interval had decreased when compared with three years ago. One in seven (14.1 percent) said return time had increased, while one in seven (14.9 percent) replied that return time had not changed when compared to three years earlier. Other respondents (20.6 percent) did not know whether the time interval between exams had changed in recent years.

One of five optometrists (20.0 percent) believe that eyewear advertising by all segments of the industry (including optical chains, superstores, etc.) has not affected the length of return time between examinations. However, two of five ODs (43.3 percent) believe that such advertising has actually reduced the exam return interval, while 5.1 percent said that advertising lengthened the return time interval. One in three respondents (31.7 percent) said they did not know what impact advertising of eyewear by all segments of the industry has had on the return time for eye examinations in their practice.

o **Respondent Years in Practice.** The mean number of years in practice of those responding to the 2001 survey was 9.7. Half (the median) number of respondents had been in practice eight years or more.
