

HIGHLIGHTS

2003 AOA Optical Dispensing Survey¹

Patients Receiving Prescriptions. During 2002, slightly more than six 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 four patients did not receive a new or changed Rx (e.g., the previous Rx was adequate), while about 11.0 percent of patients did not require any prescription. Optometrists estimated that, on average, 13.6 percent of the examined patients for whom Rx's were written took the prescriptions elsewhere to have them filled.

1. Patients Receiving Prescriptions/Rx Filled Elsewhere, Mean Percent, 1992-2002

Category	1992	1994	1998	2000	2002
Received new Rx	69.1	69.3	69.5	69.9	64.9
Did not receive new Rx	20.0	20.3	20.3	20.3	24.2
Did not require an Rx	10.9	10.4	10.2	9.8	10.9
All patients examined	100	100	100	100	100
Rx's filled elsewhere	11.9	11.5	12.7	14.3	13.6

Display Frames Returned. Optometrists reported that 14.5 percent of their display frames in 2002 were returned to suppliers. This compares with similar percentages in previous years. ODs returned most frames for style-related reasons.

2. Reasons for Return of Display Frames, Mean Percent, 1994-2002

Reason for Return	1994	1998	2000	2002
Style	35.7	39.0	37.2	35.1
Discontinued	23.1	23.4	25.0	26.4
Obsolescence	20.2	19.9	16.6	21.2
Quality	15.9	10.2	13.8	10.6
Other	5.1	7.5	7.4	6.7
All reasons	100	100	100	100

Cost of Display Frames. Most of the frames that comprised the frame display in 2002 fell within a cost range to the optometrist of \$45 to \$80. Moreover, some 14.7 percent of frames displayed included clip-on sunglasses.

¹ Responses are for calendar year 2002. A stratified random sample (4,000 AOA members) was sent a copy of this survey in 2003. The survey response rate was 25.8 percent (n = 1031). The last version of this survey was completed in 2001 and was entitled the "2001 AOA Optical Dispensing Survey."

3. Cost of Frames in Frame Display, Mean Percent, 1998-2002

Cost Intervals	1998	2000	2002
\$15 or less	8.6	8.0	7.0
\$15.01 - \$45.00	31.4	29.4	28.5
\$45.01 - \$80.00	40.3	41.7	41.2
\$80.01 or more	19.7	20.9	23.3
All cost intervals	100	100	100

Mix of Display Frames. Optometrists reported that, on average, more than one in five displayed women's frames were plastic. Plastic frames comprised smaller shares of the displayed frames for men and for children. More than three-fourths of frames for children were metal.

4. Mix of Displayed Frames, by Type and Patient Category, Mean Percent, 2002

Patient Category	Plastic	Metal	Rimless	Total
Men	16.7	65.8	17.5	100.0
Women	22.1	59.1	18.8	100.0
Children	19.4	77.3	3.3	100.0

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 most important factors in selecting a frame vendor.

5. Factors Important in the Selection of Frame Vendors

Factor (1=least/10=most important)	Median Rating
Price/cost	7
Quality	9
Styling	9
Product range/frame lines	7
Vendor relationship	8

Who Recommends Lens Options? The AOA Optical Dispensing Survey confirms that optometrists and their staffs are instrumental in helping patients to decide which lens options best meet their individual needs.

6. Who Recommends Lens Options, 2002

Option	OD	Staff	Patient
Progressive lenses	85.8%	11.0%	3.2%
Polycarbonate lenses	53.2%	45.7%	1.1%
High index lenses	42.8%	56.4%	0.8%
Photochromic lenses	34.9%	46.9%	18.2%
Tinted lenses	23.6%	54.8%	21.6%
Polarized lenses	40.3%	47.0%	12.7%
Anti-reflective coating	47.5%	48.1%	4.4%
Ultra-violet coating	52.2%	43.5%	4.3%
Scratch-resist. coating	26.7%	69.6%	3.7%

Return Time for Eye Examinations. Respondents reported an average of 17.9 months between complete (comprehensive) eye examinations (including refractions) for their established patients. The median number for this interval was 18 months. Almost two of five optometrists (37.8 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. Nearly three in ten of responding ODs (28.0 percent) believe that such advertising has actually reduced the exam return interval, while a similar percentage (28.8 percent) said that advertising lengthened the return time interval. Only 5.4 percent were unable to estimate what impact advertising of eyewear by all segments of the industry has had on the return time for eye examinations in their practice.

Income From Contact Lenses. On average, the share of gross practice income from contact lenses (including professional services and materials) remained largely unchanged during much of the previous decade when, according to AOA Economic Surveys, contact lens income showed measurable growth. However, in 2002, the mean and median percentage of gross practice income from contact lenses declined sharply for the first time in more than a decade.

7. Gross Practice Income from Contact Lenses, 1990-2002

Year	Mean Percent Practice Income	Median Percent Practice Income
2002	23.0	20.5
2000	26.9	25.0
1998	29.5	28.0
1996	26.2	25.0
1994	25.8	25.0
1992	25.6	24.0
1990	25.0	23.0

Lens Materials—Dispensing Optometrists. There is not much variance in the mix of materials used in lenses dispensed by optometrists compared with the mix of materials used by optical laboratories. The percentage of glass lenses dispensed continues to decline, while the overall share of plastic lenses has steadied. Polycarbonate lenses, which represented about 12 percent of the lenses dispensed by ODs in 1994, accounted for more than one in four lenses (25.8 percent) dispensed in 2002.

8. OD Lenses Dispensed by Materials, Mean Percent, 1994-2002

Lens Material	1994	1998	2000	2002
Glass	13.5	8.1	5.8	5.7
Plastic	74.7	73.5	67.5	68.5
Plastic (ex. high index)	63.4	58.1	51.0	49.8
High index	11.3	15.4	16.5	18.7
Polycarbonate	11.8	18.4	26.7	25.8
All lenses	100	100	100	100

Lens Type—Dispensing Optometrists. The 2003 Survey indicates that market shares for single vision and trifocal lenses remain largely the same, while progressive lenses continue to gain significant share at the expense of bifocals.

9. OD Lenses Dispensed by Type, Mean Percent, 1994-2002

Lens Type	1994	1998	2000	2002
Single vision	43.7	43.0	44.2	41.6
Bifocal (non-progressive)	30.3	24.3	20.2	20.0
Trifocal (non-progressive)	6.6	6.1	6.1	6.1
Progressive	19.4	26.6	29.5	32.3
All types	100	100	100	100

Lens Treatments—Dispensing Optometrists. The percentage of lenses dispensed by type of lens treatment in 2002 increased for most categories, except for tinted (excluding photochromic) lenses, which continue to decline. The percentage for photochromic lenses was essentially unchanged.

10. OD Dispensed Lenses with One or More Treatments, Mean Percent, 1994-2002

Type of Lens Treatment*	1994	1998	2000	2002
Scratch resistance coating	60.4	63.1	69.1	67.2
Ultra-violet coating	32.6	34.2	38.1	36.1
Tinting (ex. photochromic)	34.9	24.0	18.0	16.3
Photochromic lenses**	14.2	22.7	22.4	23.1
Anti-reflective	11.0	16.0	24.9	25.8
Polarized	2.9	4.3	7.1	8.1

* totals may exceed 100 percent

** includes Transitions, glass photochromic, etc.

In-Office Lens Finishing. Optometrists were asked to identify the types of in-office finishing, if any, they performed in the year 2002. Half of all ODs reported that they did some eyeglass finishing in that year compared to 58 percent in 2000 and 60 percent in 1998. Lens tinting was the most commonly performed activity, while lens casting was least performed by optometrists in 2002.

11. ODs Who Perform In-Office Finishing, by Procedure,
Mean Percent, 2002

Procedure	Yes
Lens tinting	52.8
Lens edging	45.0
Coating for ultra-violet	38.2
Coating for scratch-resistance	16.2
Lens surfacing	5.3
Lens casting	2.5

12. Lenses Dispensed by ODs, by Procedure,
Mean Percent, 2002

Procedure	Lenses Dispensed
Lens tinting	28.0
Lens edging	26.1
Coating for ultra-violet	20.1
Coating for scratch-resistance	8.0
Lens surfacing	2.7
Lens casting	2.7

Special Eyewear Services. In the 2003 Survey, optometrists were asked to estimate how many times, on average, they prescribed industrial safety eyeglasses, personal safety eyewear for use in and around the home, specialty eyewear for computer users, and sports safety eyewear.

13. OD Prescribed Special Eyewear Services,
Mean Frequency per Month, 2002

Eyewear Service	Mean frequency per month
Industrial safety glasses	9.8
Personal safety eyewear	4.9
Computer eyewear	14.2
Sports safety eyewear	6.2

Sales by Laboratories. The vast majority of frames sold to practitioners come from direct-sales firms, most of which get all of the products from abroad. In 2003, 23.5 percent of the orders sent to labs for lens prescriptions ordered a frame at the same time. Uncut lenses to be edged in-office comprised 18.3 percent of the orders processed by the labs—confirming again a substantial amount of on-site lens fabrication by eye doctors.

Respondent Years in Practice. The mean number of years in practice of those responding to the 2003 survey was 23.1 years. Half (the median) number of respondents had been in practice 22.0 years or more.

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