



Q2 2016 CANADIAN VS. USA MARKET OVERVIEW

**NEW
DATA!**



Canada Market Overview
June 2016

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Report
Q4 2015](#)

Survey data herein is provided by VisionWatch Canada
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Vision Correction and Exams



CA



US

	CA	US
Uses any form of Vision Correction	73.6%	76.0%
Prescription Eyeglasses ⁺	65.1%	64.3%
Contact Lenses ⁺	13.3%	16.2%
Reading Glasses (OTC) ⁺	12.0%	12.4%
Prescription Sunglasses ⁺	9.6%	11.9%
<small>(Wears At All)</small>		
Need Vision Correction but Don't Use	6.4%	5.3%
Private Vision Insurance Coverage [*]	19.3%	50.5%
Eye Exam within Last 6 Months	25.9%	23.4%
Independent ECP	16.1%	69.4%
Independent Optical Store	48.7%	
Retail Optical Chain	22.8%	14.0%
<small>(Of Exam Patients)</small>		

⁺Based upon information and guidance from vision industry stakeholders these values were edited *upward* from consumer reported data

^{*}Based upon information and guidance from vision industry stakeholders these values were edited *downward* from raw consumer data

* Question phrasing may have contributed to a misleading result. Under review.

Corrective Eyewear Frames



CA



US

	CA	US
Prescription Eyeglass Usage	65.1%	64.3%
Purchased in Last 6 months <small>(Of Respondents Using)</small>	16.9%	14.0%
Purchased Complete Eyeglass <small>(Frame and Lens)</small>	86.6%	90.0%
Repurchase Cycle <small>(years)</small>	2.6	2.1

Frames Market (Approximate twelve month sales)

Units Sold <small>(Millions of pairs)</small>	7.2	74.4
Total Value <small>(Millions of CAD)*</small>	\$ 1,381	\$ 12,391
Average Price Paid <small>(CAD)*</small>	\$ 191	\$ 167

Channel Sales (by units)

Independent Optical Store	43.2%	45.7%
Retail Optical Chain	41.4%	26.8%
Other (Dept Store, Mass Merchants)	15.4%	27.5%

← Includes opticals and ODS

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Corrective Lenses



CA



US

Lens Market (Approximate twelve month sales)

Units Sold <small>(Millions of pairs)⁺</small>	6.2	83.4
Total Value <small>(Millions of CAD)⁺</small>	\$ 1,383	\$ 16,369
Average Price Paid <small>(CAD)</small>	\$ 225	\$ 196
Single Vision	\$ 153	\$ 133
Multifocal	\$ 222	\$ 135
Progressive	\$ 329	\$ 340

Lens Styles (by units)

Single Vision ⁻	53.0%	52.8%
Multifocal ⁺	15.2%	16.9%
Progressive	31.8%	30.4%

Lens Coatings (by units)

Photochromic	11.2%	15.8%
Anti-Reflective ⁺	65.7%	30.1%
Tinted	8.1%	7.3%

Plano Sunwear



Plano Sunglass Usage

	CA	US
Wears Plano Sunglasses (Costing UNDER \$50 CAD or USD)	37.9%	64.5%
Wears Plano Sunglasses (Costing OVER \$50 CAD or USD)	24.3%	23.1%

Plano Sunglass Market (Approximate twelve month sales)

	CA	US
Units Sold (Millions)	10.3	103.8
Total Value (Millions of CAD) [†]	\$ 621	\$ 5,284
Average Price Paid (CAD) [†]	\$ 60	\$ 51

*

Channel Sales (by units)

	CA	US
Independent Optical Store [†]	6.2%	1.2%
Retail Optical Chain	5.2%	1.3%
Department Store [†]	6.9%	4.5%
Sunglass Specialty Store	4.2%	12.5%
Pharmacy / Drugstore	12.8%	9.1%
Mass Merchandiser	10.8%	24.4%
Sporting Goods Store	3.7%	2.7%
Other	50.3%	44.3%

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Readers and Contact Lenses



CA



US

	CA	US
Reading Glasses (OTC) Usage	12.0%	12.4%
Approximate Units Purchased <small>(Twelve month sales, millions)</small>	2.9	51.7
Purchased in Last 6 months <small>(Of Respondents Using)</small>	41.7%	56.0%
Repurchase Cycle <small>(years)</small>	1.2	0.6
Contact Lenses Usage	13.3%	16.2%
Approximate Users <small>(Millions of people)</small>	3.7	40.3
Purchased in Last 6 months <small>(Of Respondents Using)</small>	47.4%	51.9%
Repurchase Cycle <small>(years)</small>	1.0	1.0
Contact Channel Sales <small>(by people)</small>		
Physical Retail Location	81.1%	70.5%
Internet	17.5%	18.6%
Telephone	1.9%	2.9%
Other/Unsure	1.1%	8.0%

Refractive Surgery




CA



US

Had Refractive Surgery (At any time)	3.5%	4.3%
LASIK / Laser	28.3%	35.9%
Custom Lasik	5.8%	5.9%
PRK (Photo Keratectomy)	3.3%	4.9%
INTACTS (Corneal Rings)	4.9%	4.3%
<small>(Of Surgery Patients, based on their best recollection)</small>		
Premium IOL (Intra Ocular)	8.4%	8.0%
Had Surgery within Past Six Months	5.5%	5.2%
Very Aware of Surgery Procedures	11.4%	24.2%
<small>(Of Non-Surgery Patients)</small>		

Demographic Comparisons

 Canada (CA)	Total	Male	Female	18-34	35-44	45-54	55+
Uses any form of Vision Correction	73.6%	69.6%	77.2%	57.3%	61.3%	79.2%	88.4%
Prescription Eyeglasses	65.1%	60.9%	69.0%	52.7%	55.9%	68.0%	77.2%
Contact Lenses	13.3%	9.2%	17.1%	19.1%	19.4%	10.7%	7.5%
Reading Glasses (OTC)	12.0%	11.7%	12.2%	2.1%	3.9%	18.2%	19.7%
Prescription Sunglasses (Wears At All)	9.6%	8.9%	10.3%	7.0%	9.5%	9.8%	11.6%
Private Vision Insurance Coverage ⁺	19.3%	19.6%	19.0%	19.1%	23.3%	20.8%	16.8%
Eye Exam within Last 6 Months	25.9%	26.8%	25.1%	25.6%	24.3%	22.9%	28.6%
Eyeglass Repurchase Cycle (years)	2.6	2.5	2.7	2.0	2.0	2.4	3.6
Frame Average Price Paid (CAD) ⁺	\$ 191	\$ 194	\$ 189	\$ 176	\$ 170	\$ 191	\$ 220
Lens Average Price Paid (CAD)	\$ 225	\$ 239	\$ 212	\$ 179	\$ 183	\$ 238	\$ 281
Progressive Lenses (percent of total units)	31.8%	32.2%	31.4%	1.4%	11.6%	36.9%	55.7%
Contacts Repurchase Cycle (years) ⁻	1.0	0.7	1.4	0.9	1.1	0.9	1.4
Readers Repurchase Cycle (years) ⁻	1.2	1.1	1.2	1.3	1.2	1.0	1.2
Sunglass Average Price Paid (CAD)	\$ 60	\$ 72	\$ 50	\$ 60	\$ 66	\$ 63	\$ 53
Sunglass Repurchase Cycle (years)	2.1	2.1	2.1	1.5	1.6	2.2	3.6

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Notes and Methodology

- Data in this presentation is subject to periodic revision as proper baselines for market sizing are established; continued feedback in this area is very helpful
- Responses from 1,000 adults in Canada are collected each month (for a total of 12,000 responses annually)
- The incoming samples is structured to represent the Canadian adult population by gender and age
- Responses have also been found to be representative of the population by country region and urban areas
- The survey instrument was translated from English into French with the assistance of industry and in-country experts for French-speaking survey respondents residing in Quebec
- After initial data review and implementation of translation revisions, VisionWatch Canada fully launched in January 2015
- Responses are reviewed and adjusted for accuracy, and weighted by personal demographics and other characteristics before being aggregated to the totals reported
- Canadian dollar equivalencies are based on the average exchange rates during the reported period
- Updates are freely available to members of The Vision Council and partnering industry associations
- Information contained within this may not be republished in any form without written consent from The Vision Council

to be consistent with terminology commonly used in the Canadian market

For more information, please contact Steve Kodey, skodey@thevisioncouncil.org or +001.703.740.1095.



Connecting Your Vision to Canadian Eye Care Professionals

512 Woolwich Street #4
Guelph ON N1H 3X7

10 Churchill Blvd, Suite 202
Greenfield Park QC J4V 2L7

sales@vuepoint.ca

vuepoint.ca

(226) 780 6871 Toronto

(438) 795 7531 Montréal