

Consumer inSights Canada Q1 & Q2:

Supplemental Report with Select U.S Consumer Comparisons

About This Report

This supplemental report compares some key highlights from the new Consumer inSights Canada report to the existing Consumer inSights report on U.S. consumers. The U.S. Consumer inSights survey was adapted for the Canadian market and gathered information from Canadian consumers regarding their choices in vision care for the first half of 2024. The survey focused on areas such as managed vision care, frequency of eye exams, and purchasing behavior for eyeglasses, lenses, frames, readers, and plano sunglasses. While the full report offers valuable insights into how Canadian consumers navigate vision care within their country, comparisons to the U.S. version of the report are included here, though they are intended primarily to offer context. Given the significant differences between the two markets and their healthcare systems, direct comparisons, especially in areas like managed vision care, should be approached with caution, as they may not yield meaningful conclusions.

Exam Frequency

In the first half of 2024, Canadian consumers reported a longer span of time between eye exams than American consumers. The average eye exam cycle reported by Canadians was 21 months between exams, compared to 16 months for American consumers. The median number of months between exams was 14 months for Canadians, compared to 12 months for American consumers. 49 percent of Canadians reported having their prior exam within 12 months of their previous eye exam, compared to approximately 62 percent of American consumers.

Average eye exam cycle



Managed Vision Care Coverage

Canadian consumers reported lower rates of managed vision care coverage (45 percent) than American consumers (66 percent). While Canada's national or provincial health insurance program may cover eye exams for younger and older populations as well as those with certain medical conditions or income brackets, somewhat similarly to Medicare/Medicaid in the United States, others may have managed vision care coverage through private insurance plans, sometimes offered by employers.

Similarly to the U.S. market, there are differences in coverage across age and household income. 71 percent of Canadian households with incomes of \$80k or more per year reported having managed vision care, compared to 38 percent of households under \$80k. 49 percent of the younger two generations of Canadians, Gen Z and Millennials, have managed vision care, compared to 38 percent of Baby Boomers and The Silent Generation.

Prescription Eyeglasses Purchases

As anticipated with lower managed vision care rates, and less frequent eye exams, Canadian consumers also reported purchasing prescription glasses less frequently than American consumers. 52 percent of Canadians with managed vision care bought new prescription glasses within the past year, compared to 63 percent of Americans. The average number of months between prior and recent glasses purchases for Canadian consumers was 26 months, whereas American consumers reported 20 months. The median number of months between glasses purchases in Canada is 24 months, compared to approximately 12 months for Americans. Medians are often less influenced by extreme outliers, implying that Canadian consumers are likely purchasing new glasses once every two years, compared to American consumers making a new purchase about once a year. Even among those with managed vision care, Canadians are still buying glasses less often.

Average glasses purchase cycle



Conclusion

The first half of 2024 revealed some notable differences in how Canadian consumers engage with vision care, compared to their American counterparts. Canadians reported lower managed vision care coverage, less frequent eye exams, and fewer prescription glasses purchases. These differences reflect unique aspects of Canada's healthcare landscape, where public and private coverage intersect in ways that differ significantly from the U.S. system.

While the full report offers an initial exploration of the Canadian optical market, the comparisons with the U.S. in this supplemental report provide context rather than direct equivalencies. Despite these variations, the data reveals opportunities for further analysis and deeper insights into Canadian consumer behavior. As this is the inaugural iteration of the Canadian Consumer inSights report, future reports will allow for the tracking of trends over time, offering a clearer picture of how the Canadian market evolves.