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2015 CANADIAN VS. USA MARKET OVERVIEW

THE VISION COUNCIL VISIONWATCH

Survey data herein is provided by VisionWatch Canada and is distributed with consent of The Vision Council.

Vision Correction and Exams

		
Uses any form of Vision Correction	76.3%	75.7%
Prescription Eyeglasses	67.1%	64.2%
Contact Lenses	9.0%	16.0%
Reading Glasses (OTC)	9.9%	12.4%
Prescription Sunglasses	8.9%	11.7%
(Wears At All)		
Need Vision Correction but Don't Use	5.1%	5.3%
Private Vision Insurance Coverage	29.4%	49.9%
Eye Exam within Last 6 Months	25.4%	23.6%
Independent ECP	46.0%	68.9%
Independent Optical Store	20.7%	
Retail Optical Chain	20.6%	14.2%
(Of Exam Patients)		

Source: VisionWatch and VisionWatch Canada, June 2015. Sample size: 110,000 and 12,000 Adults respectively.

Corrective Eyewear Frames

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	Canada	USA
Prescription Eyeglass Usage	67.1%	64.2%
Purchased in Last 6 months (Of Respondents Using)	17.0%	22.3%
Purchased Complete Eyeglass (Frame and Lens)	87.1%	90.0%
Repurchase Cycle (years)	2.5	2.2
Frames Market (Approximate twelve month sales)		
Units Sold (Millions of pairs)	7.7	73.3
Total Value (Millions of CAD)	1,296	11,555
Average Price Paid (CAD)	169	158
Channel Sales (by units)		
Independent ECP (including independent Optical	44.0%	45.5%
Retail Optical Chain	42.6%	26.8%
Other (Dept Store, Mass Merchants)	13.4%	27.7%

Source: VisionWatch and VisionWatch Canada, June 2015. Sample size: 110,000 and 12,000 Adults respectively.

Corrective Lenses

	Canada	USA
Lens Market (Approximate twelve month sales)		
Units Sold (Millions of pairs)	9.0	82.1
Total Value (Millions of CAD)	1,865	15,023
Average Price Paid (CAD)	207	183
Single Vision	176	124
Multifocal	187	126
Progressive	283	319
Lens Styles (by units)		
Single Vision	55.0%	52.0%
Multifocal	18.4%	17.9%
Progressive	26.6%	30.1%
Lens Coatings (by units)		
Photochromic	12.1%	15.8%
Anti-Reflective	53.9%	30.0%
Sun Tinted / Polarized	11.2%	7.4%

Source: VisionWatch and VisionWatch Canada, June 2015. Sample size: 110,000 and 12,000 Adults respectively. © The Vision Council 2015

Plano Sunwear

	Canada	USA
Plano Sunglass Usage	82.4%	86.1%
Wears Premium Sunglasses (Costing over $50 CAD or USD)	24.7%	25.3%
Plano Sunglass Market (Approximate twelve month sales)		
Units Sold (Millions)	10.1	102.4
Total Value (Millions of CAD)	477	4,893
Average Price Paid (CAD)	47	48
Channel Sales (by units)		
Independent ECP	3.8%	1.2%
Retail Optical Chain	5.5%	1.3%
Department Store	16.0%	4.5%
Sunglass Specialty Store	4.1%	12.2%
Pharmacy / Drugstore	11.0%	9.2%
Mass Merchandiser	7.3%	24.4%
Sporting Goods Store	2.7%	2.7%

Source: VisionWatch and VisionWatch Canada, June 2015. Sample size: 110,000 and 12,000 Adults respectively.

Readers and Contact Lenses

	Canada	USA
Reading Glasses (OTC) Usage	9.9%	12.4%
Approximate Units Purchased (Twelve month sales, millions)	3.4	50.8
Purchased in Last 6 months (Of Respondents Using)	42.9%	57.4%
Repurchase Cycle (years)	1.0	0.9
Contact Lenses Usage	9.0%	16.0%
Approximate Purchasers (Six month sales, millions of people)	4.1	39.4
Purchased in Last 6 months (Of Respondents Using)	49.0%	52.6%
Repurchase Cycle (years)	1.0	1.0
Contact Channel Sales (by people)		
Physical Retail Location	73.3%	70.5%
Internet	20.6%	18.5%
Telephone	3.5%	2.7%

Source: VisionWatch and VisionWatch Canada, June 2015. Sample size: 110,000 and 12,000 Adults respectively.

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

VisionWatch Canada started in November 2014 to collect and report information on the vision care industry for all provinces and regions in Canada.

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 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 Canadian with the assistance of industry and in-country experts

After initial data review and implementation of translation revisions, VisionWatch Canada fully launched in February 2015

Channel nomenclature has been modified by VuePoint to be consistent with terminology commonly used in the Canadian market

Responses are reviewed for accuracy, 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

Quarterly updates are freely available to members of The Vision Council and partnering industry associations

For more information, please contact Brin Miller, bmiller@thevisioncouncil.org or +001.703.740.2251.

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