

JANUARY 2019

2018 American Eye-Q Results





BACKGROUND

For the past several years, the American Optometric Association (AOA) has conducted an annual survey of the general population known as the American Eye-Q® Survey. Through this survey, the AOA has sought to understand people's awareness and knowledge of eye health with the goal of generating compelling data that can be shared with media to continue to:

- Educate the general population on optometry and related eye health topics.
- Raise awareness of potential risks to eye health and how doctors of optometry can help.
- Position the AOA as the experts on eye health.



OBJECTIVES

BUSINESS OBJECTIVE

Establish the AOA as the leader within the eye health conversation and as the primary care provider for eye and vision health.

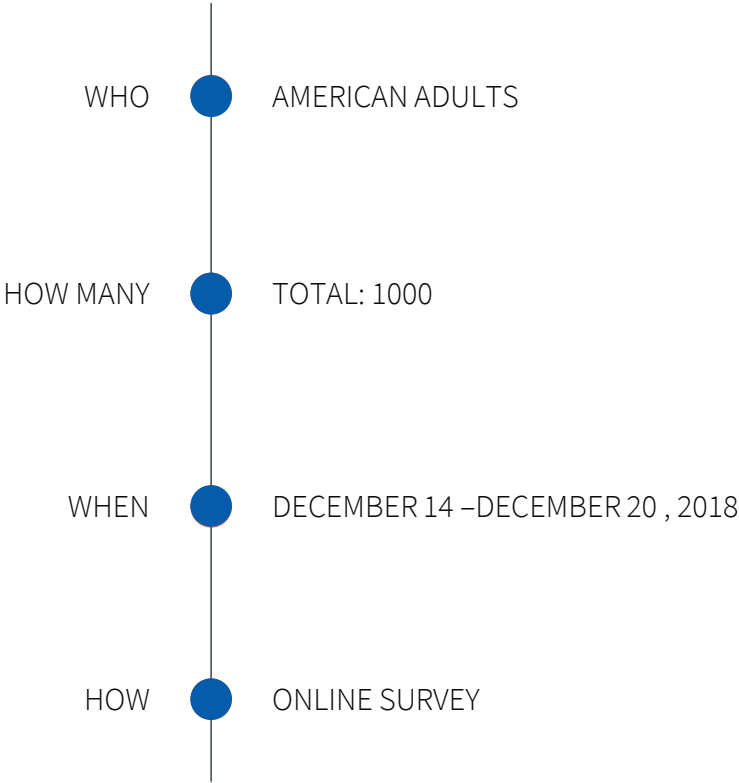
PROGRAM OBJECTIVE

Drive media coverage around eye health topics that are most relevant to emerging trends within the industry and interesting to the general population.

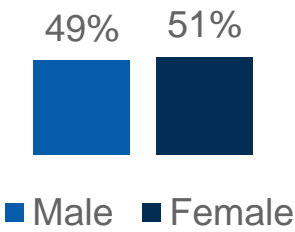
RESEARCH OBJECTIVES

Support communication outreach efforts by providing mediable statistics within relevant topics of conversation and shareable insights into changes in public opinion/awareness over time.

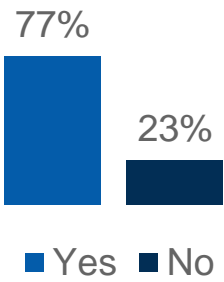
KEY DEMOGRAPHICS AND METHODOLOGY



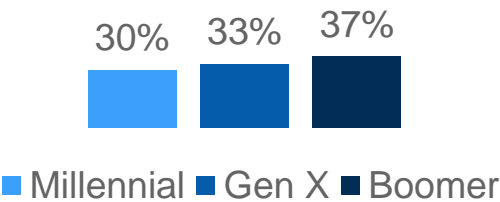
Gender
Base: (M=491) (F=509)



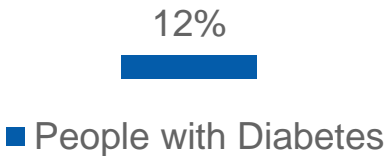
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



People with Diabetes
Base: (D=129)





METHODOLOGY FOR PITCHING

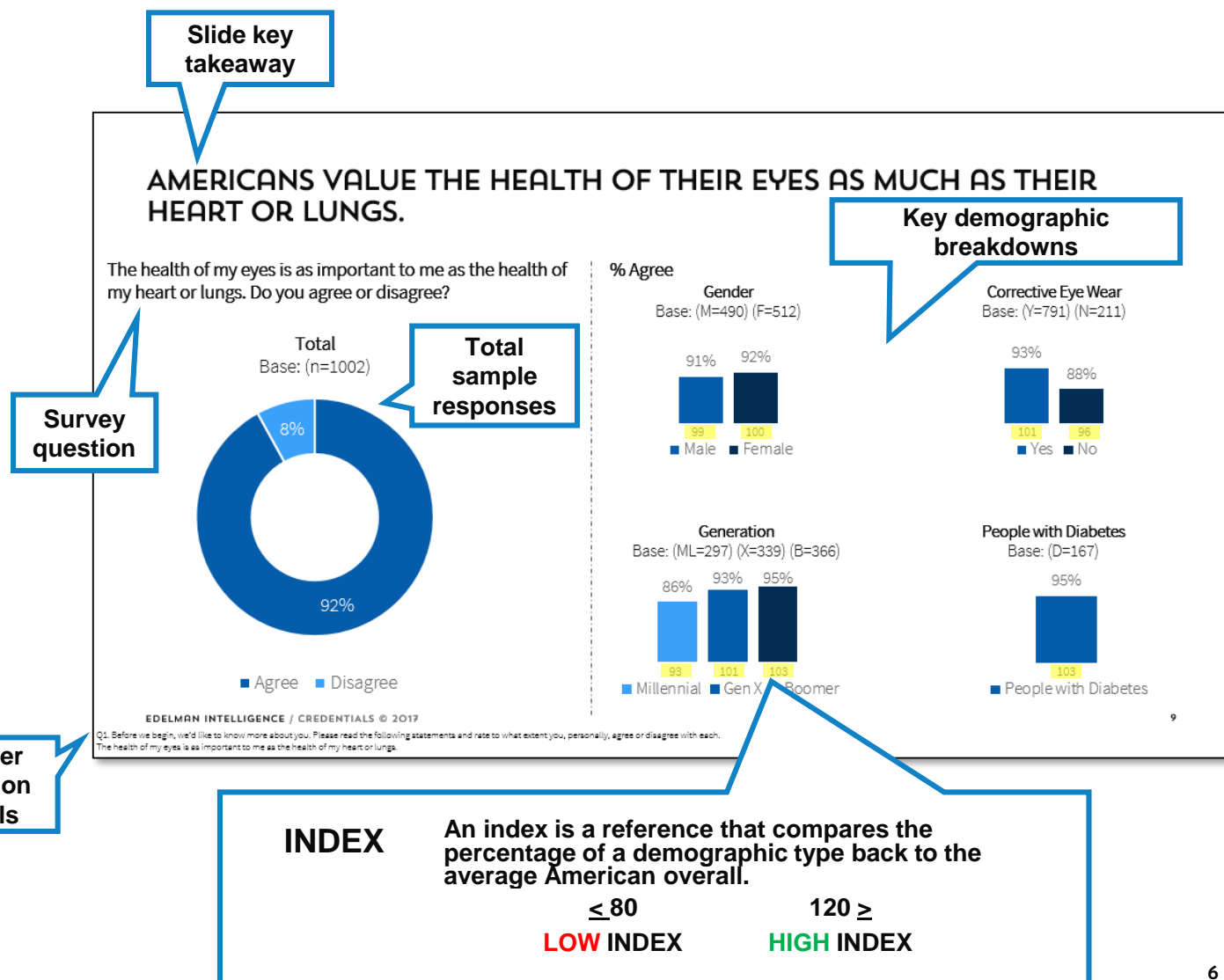
The American Optometric Association commissioned a 20-minute, online survey among a nationally-representative sample of $n=1000$ U.S. adults ages 18+. The margin of error for this sample is ± 3.1 at the 95% confidence level. The survey fielded between December 14 and December 20, 2018.

REPORT STRUCTURE

This report consists of six sections addressing the focus areas chosen for this year's Eye-Q survey.

- Each is prefaced by a slide outlining the key narrative for each section.
- The subsequent slides include detailed findings broken down by key demographics.
- Each section also features an appendix of additional data that is not relevant to the overall narrative.

The image to the right explains the contents of each slide.





TRACKING QUESTIONS (SLIDES 7-42)



COMPREHENSIVE EYE EXAM (SLIDES 43-56)



PEDIATRICS (SLIDES 57-80)



DIABETES (SLIDES 81-100)



CONTACT LENSES AND GLASSES (SLIDES 101-135)



ONLINE VISION SCREENING APPS (SLIDES 136-143)



GAMING/SPORTS (SLIDES 144-149)





TRACKING DATA REMAINS CONSISTENT YEAR-OVER- YEAR

Americans overwhelmingly continue to value their eye health and vision as much as or more than other organs and senses or abilities.

- 93% value the health of their eyes as much as the health of their heart or lungs.
- Half of Americans (49%) worry most about losing their vision – more than their memory and ability to walk.

However, a third don't know how to take care of their eyes.

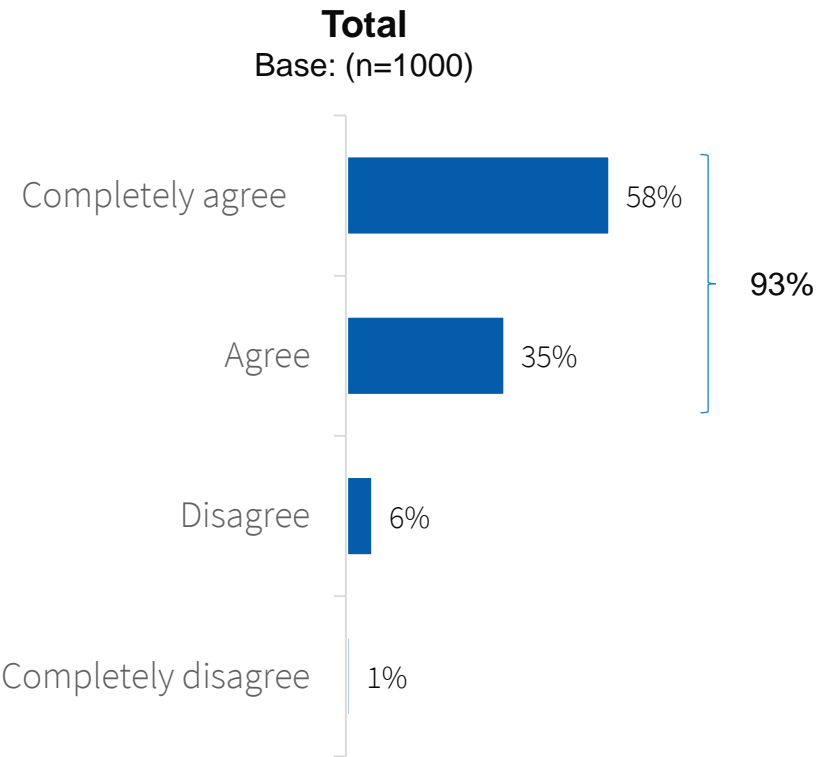
- The majority (84%) would like to learn more about how to take better care of their eyes.
- Seven in ten (71%) say they would take better care of their eyes if it was easier to do.

Americans place their trust in doctors of optometry to monitor the health of their eyes and provide accurate information.

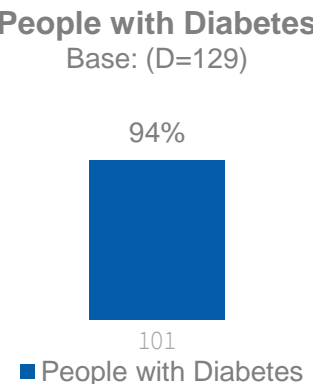
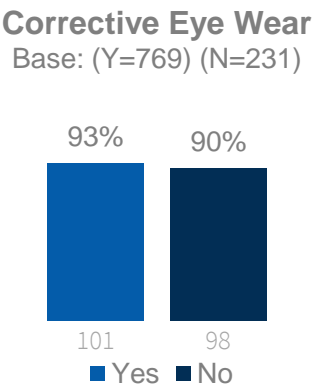
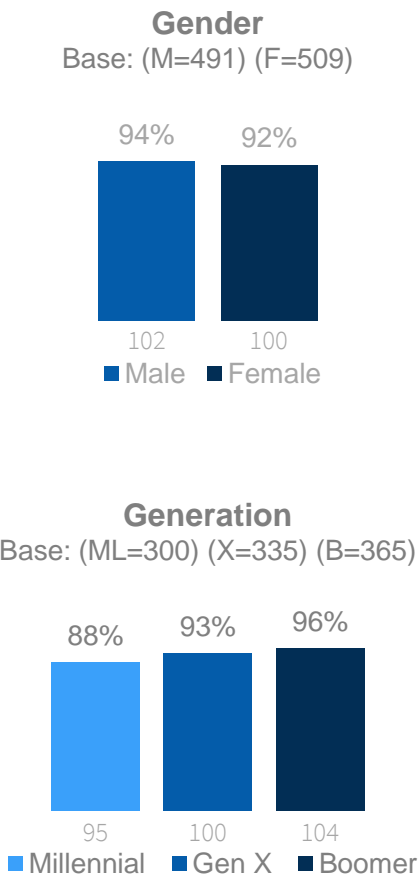
- Nearly half (48%) rely on doctors of optometry/optometrists to monitor the health of their eyes and 53% visit an eye health professional at least once a year.
- **Almost all (94%) trust doctors of optometry/optometrists for accurate and reliable information about eye health, which has stayed the same year-over-year.**
- When asked which information source they trust the most, over half (52%) select doctors of optometry/optometrists – significantly more than primary care physicians, internet websites, and mobile apps.
- Nearly half (46%) of people also would turn to a doctor of optometry/optometrist first if they were to experience an issue with their eye.

AMERICANS OVERWHELMINGLY VALUE THE HEALTH OF THEIR EYES AS MUCH AS THE HEALTH OF THEIR HEART OR LUNGS.

“The health of my eyes is as important to me as the health of my heart or lungs.” Please rate to what extent you, personally, agree or disagree with this statement.

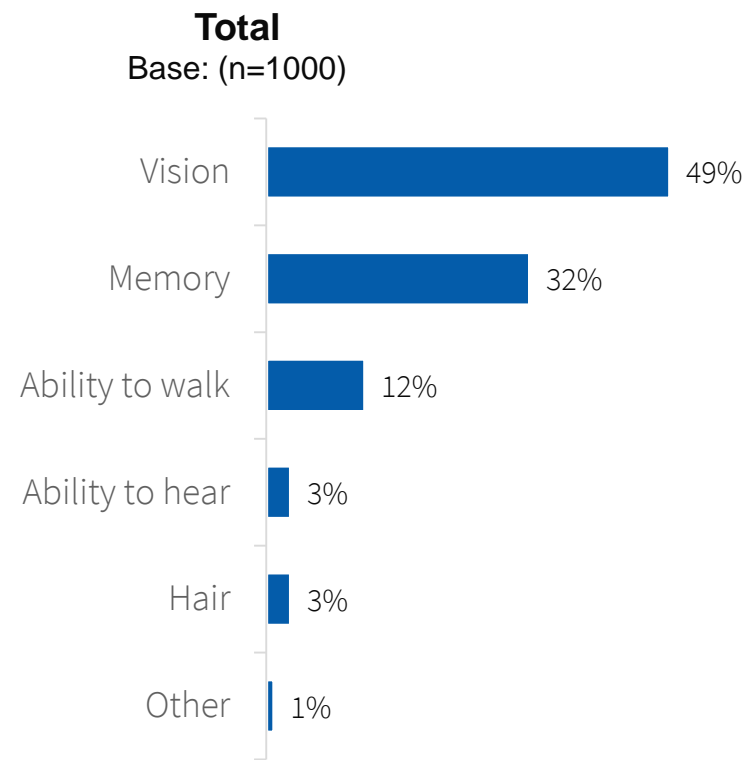


% Completely agree or agree

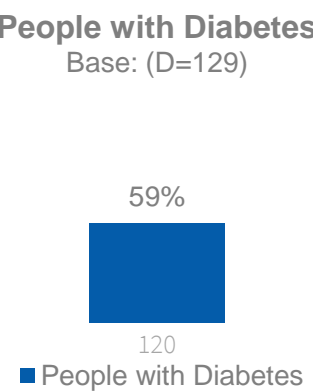
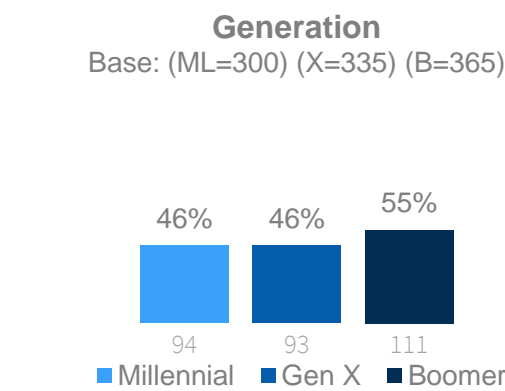
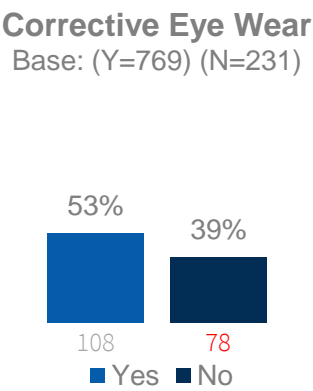
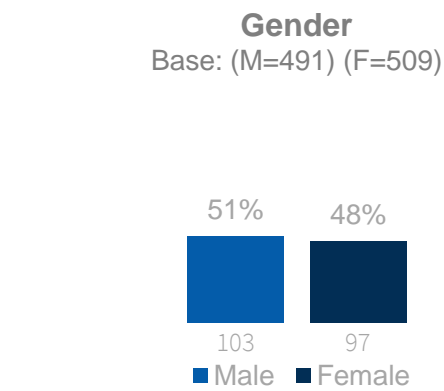


AMERICANS ARE MORE WORRIED ABOUT LOSING THEIR VISION THAN THEIR MEMORY.

Which of the following would you most worry about losing?

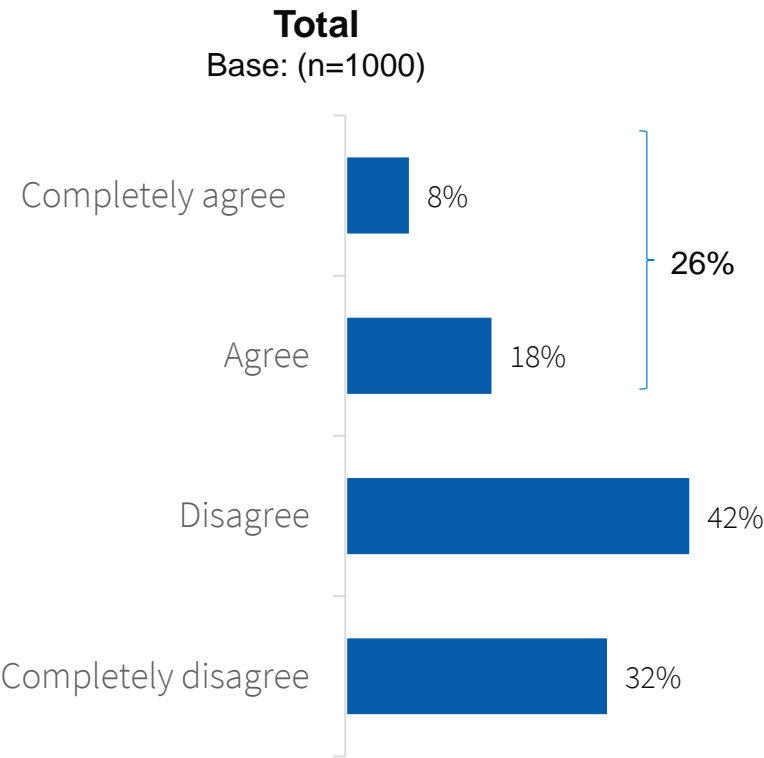


% Vision



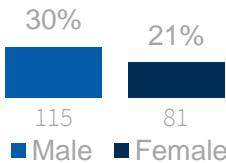
ONE IN FOUR AMERICANS DON'T THINK THEY NEED AN EYE EXAM IF THEIR VISION IS CLEAR.

“If I can see clearly, I don’t need to have an eye exam.”
Please rate to what extent you, personally, agree or disagree with this statement.

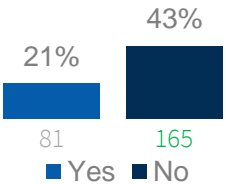


% Completely agree or agree

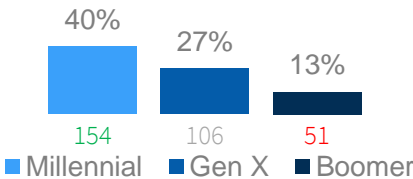
Gender
Base: (M=491) (F=509)



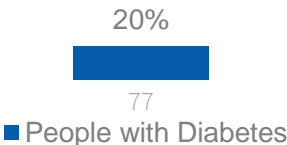
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

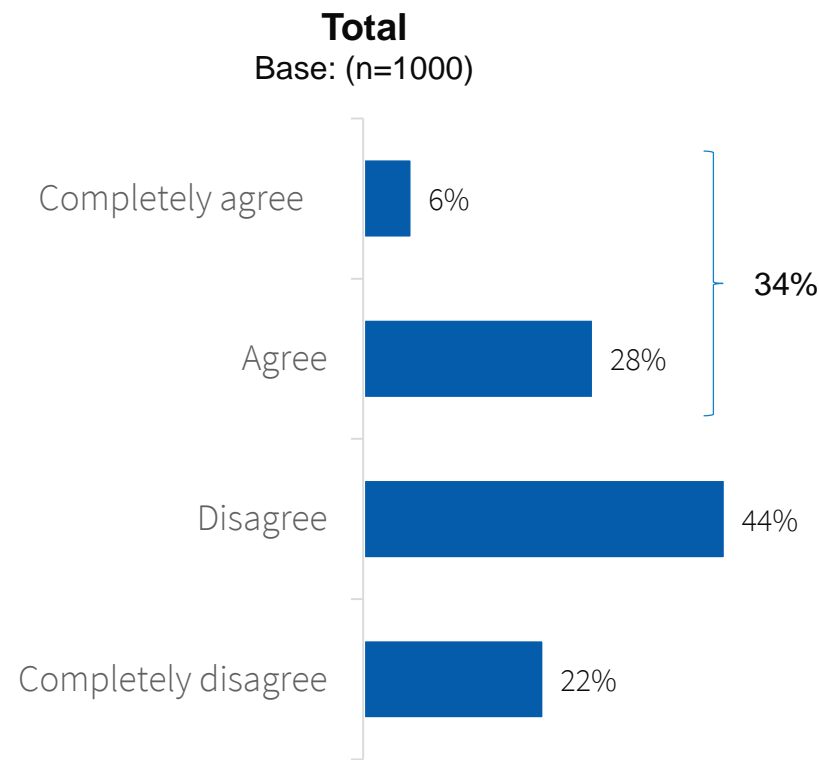


People with Diabetes
Base: (D=129)

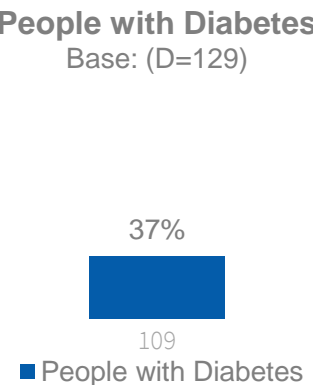
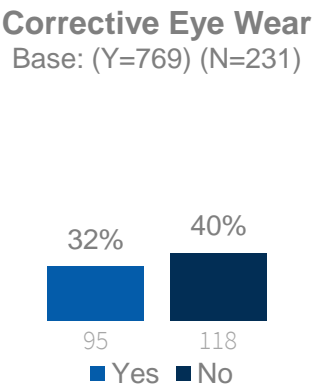
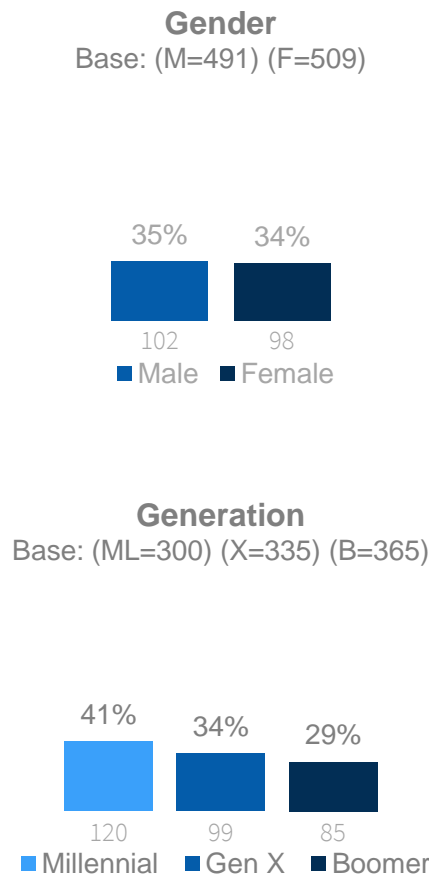


A THIRD OF AMERICANS DON'T KNOW HOW TO TAKE GOOD CARE OF THEIR EYES.

"I don't know how to take good care of my eyes." Please rate to what extent you, personally, agree or disagree with this statement.

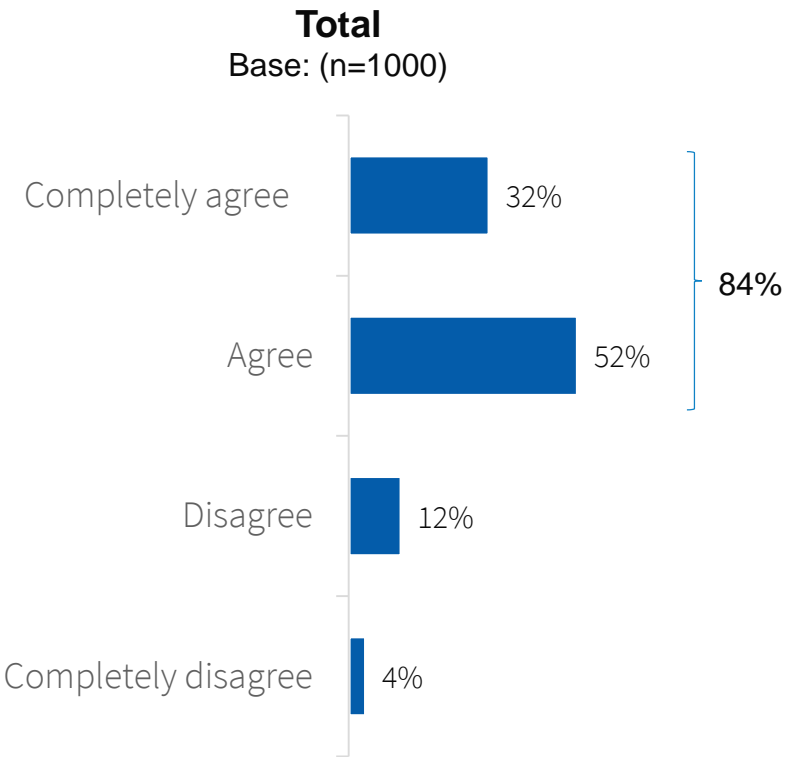


% Completely agree or agree

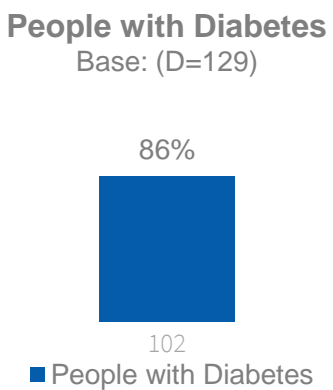
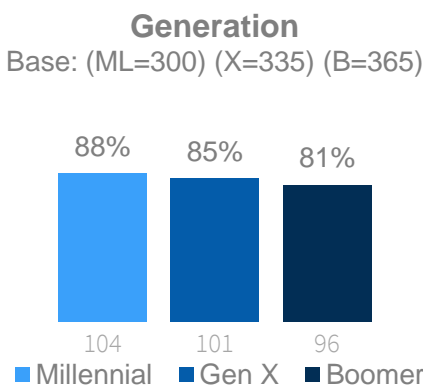
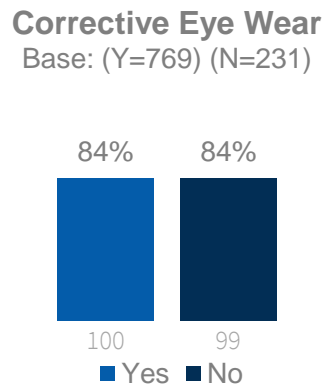
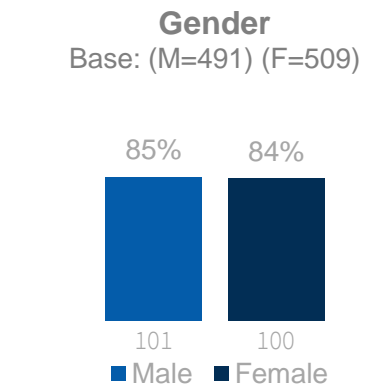


MOST AMERICANS WOULD LIKE TO LEARN MORE ABOUT HOW TO TAKE BETTER CARE OF THEIR EYES.

“I should learn more about how to take better care of my eyes.”
Please rate to what extent you, personally, agree or disagree with this statement.



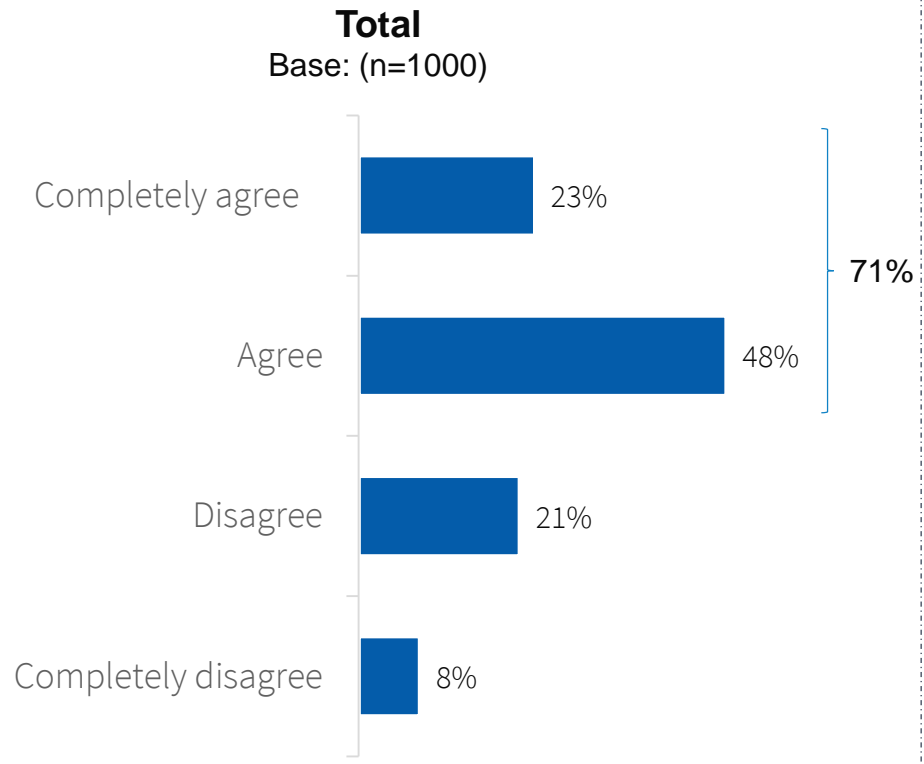
% Completely agree or agree



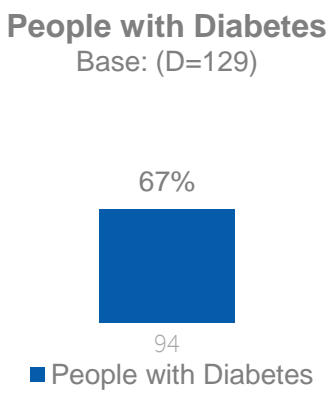
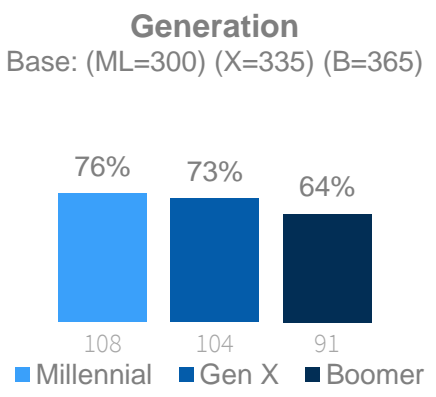
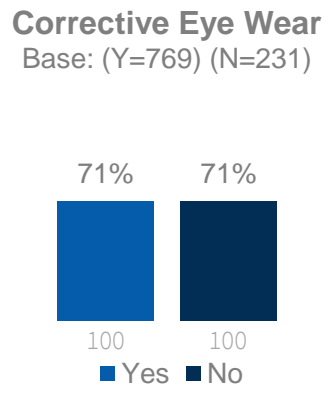
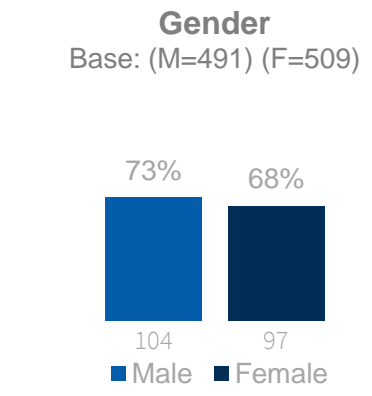
Q1. Before we begin, we'd like to know more about you. Please read the following statements and rate to what extent you, personally, agree or disagree with each. *I should learn more about how to take better care of my eyes.*

SEVEN IN TEN AMERICANS WOULD TAKE BETTER CARE OF THEIR EYES IF IT WERE EASIER TO DO.

“I would take better care of my eyes if it were easier to do.” Please rate to what extent you, personally, agree or disagree with this statement.



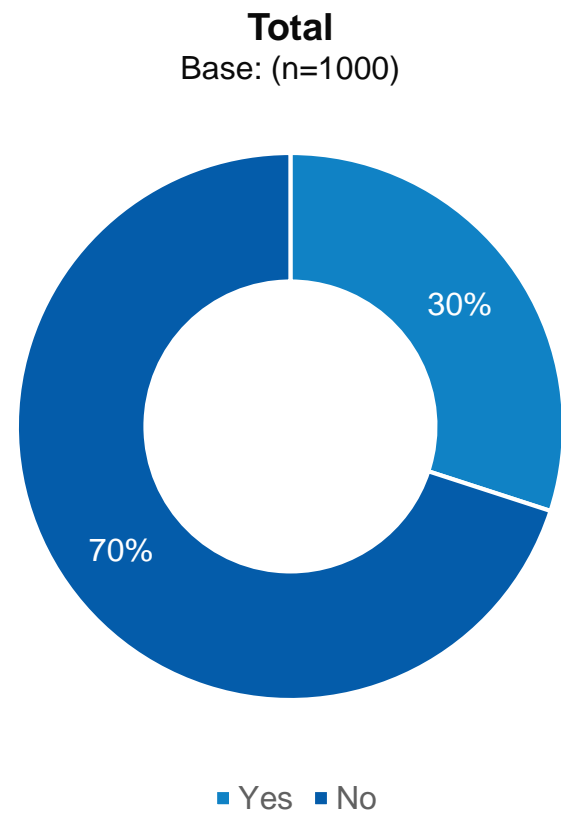
% Completely agree or agree



Q1. Before we begin, we'd like to know more about you. Please read the following statements and rate to what extent you, personally, agree or disagree with each. *I would take better care of my eyes if it were easier to do.*

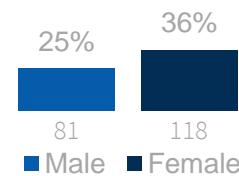
THREE IN TEN AMERICANS HAVE SKIPPED A DOCTOR VISIT OF ANY KIND IN THE PAST YEAR DUE TO MONEY CONCERNS.

Have you skipped any doctor visits within the past year because of money concerns?

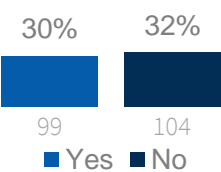


% Yes

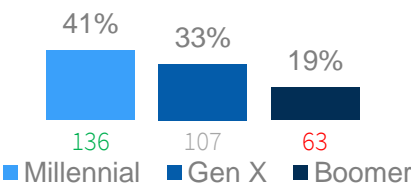
Gender
Base: (M=491) (F=509)



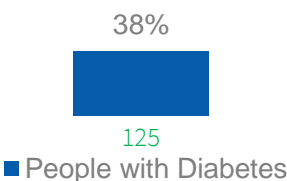
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

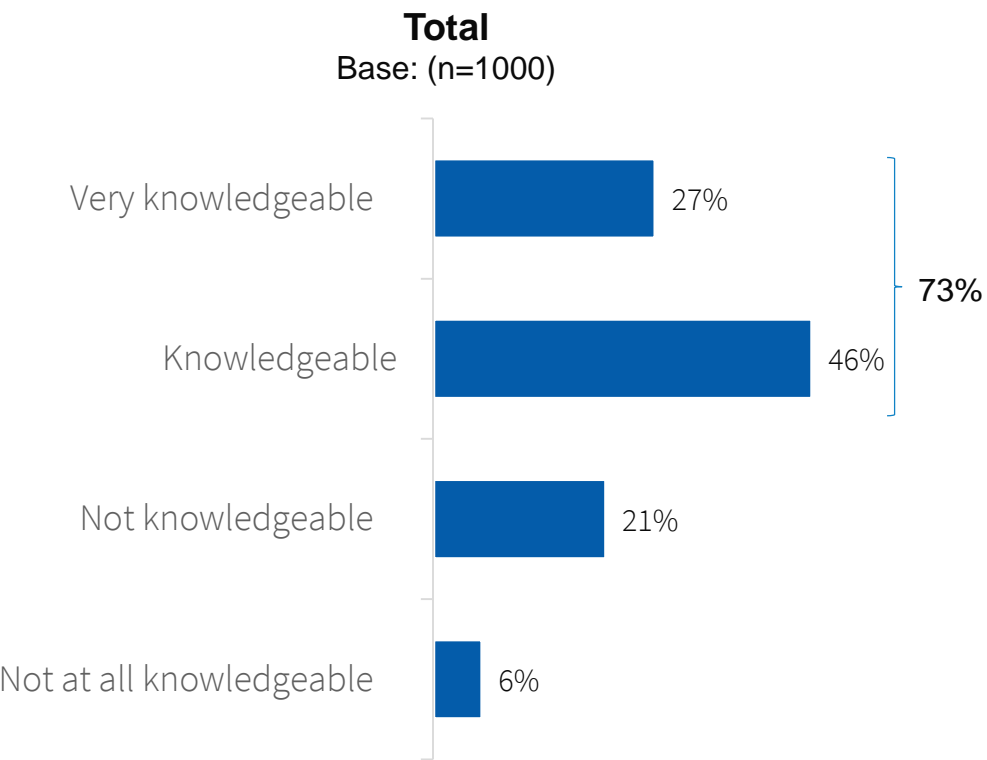


People with Diabetes
Base: (D=129)

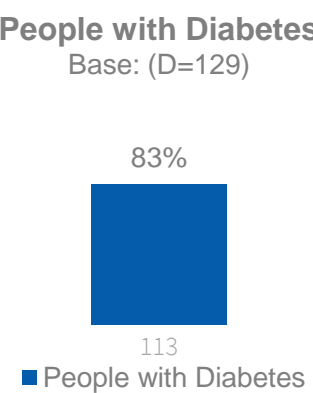
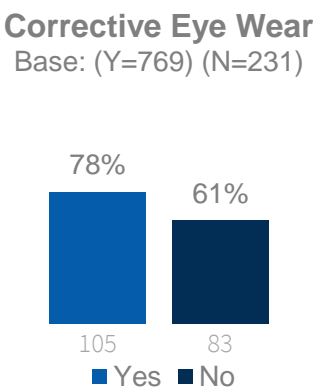
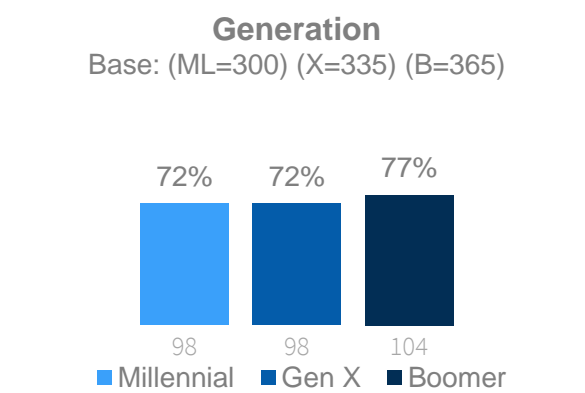
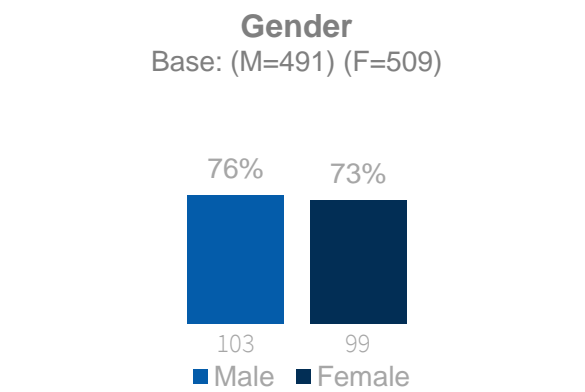


NEARLY THREE-FOURTHS OF AMERICANS FEEL KNOWLEDGEABLE ABOUT WHAT EACH ELEMENT OF THE EYE EXAM IS FOR.

How knowledgeable do you feel about what each element of the eye exam conducted by your [eye health professional] does for your eyes and your eye health?

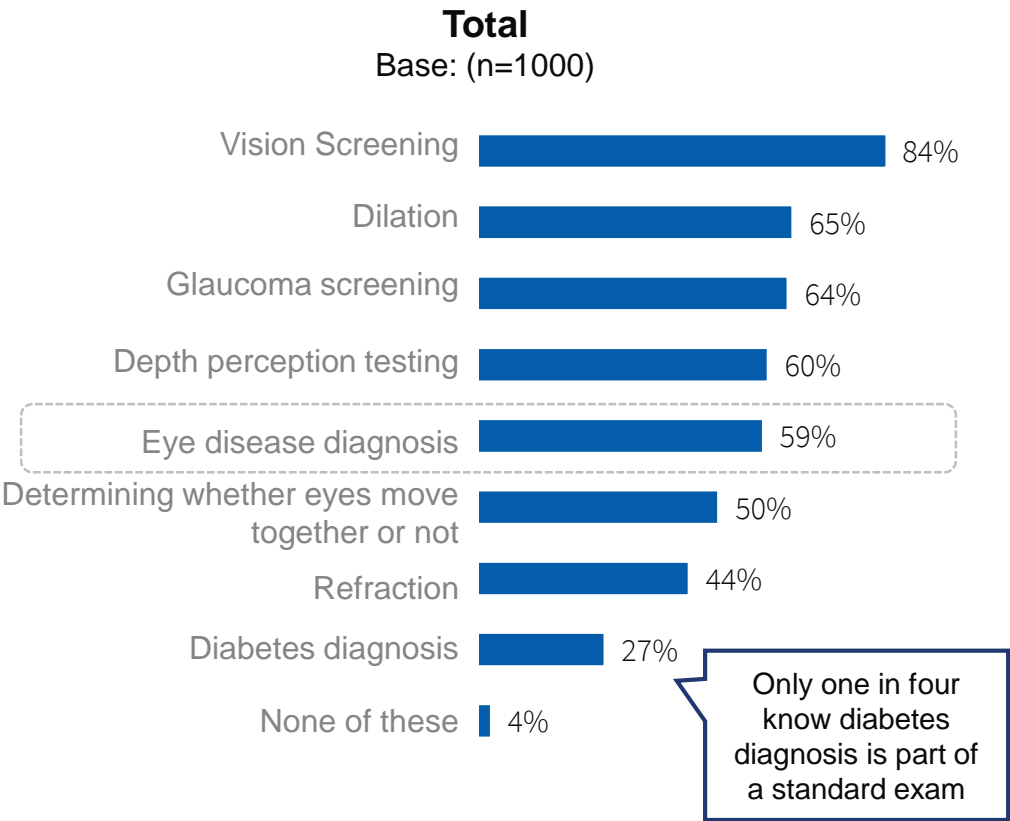


% Very knowledgeable or knowledgeable

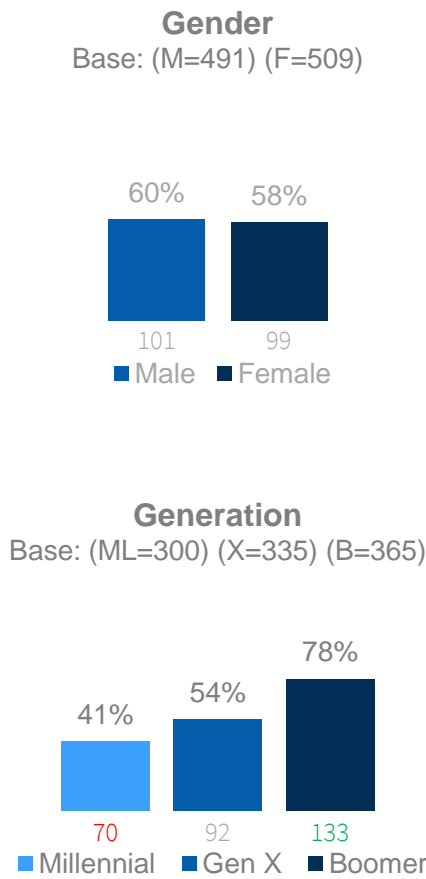


THREE IN FIVE AMERICANS KNOW THAT AN EYE DISEASE DIAGNOSIS IS PART OF A STANDARD EYE EXAM.

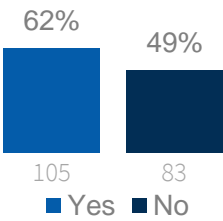
Which of the following do you think is a standard part of the eye exam that is conducted during a check-up visit to your [eye health professional]? *Please select all that apply.*



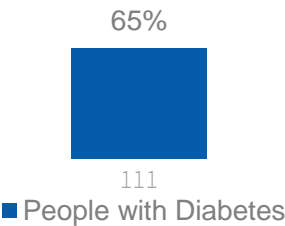
% Eye disease diagnosis



Corrective Eye Wear
Base: (Y=769) (N=231)



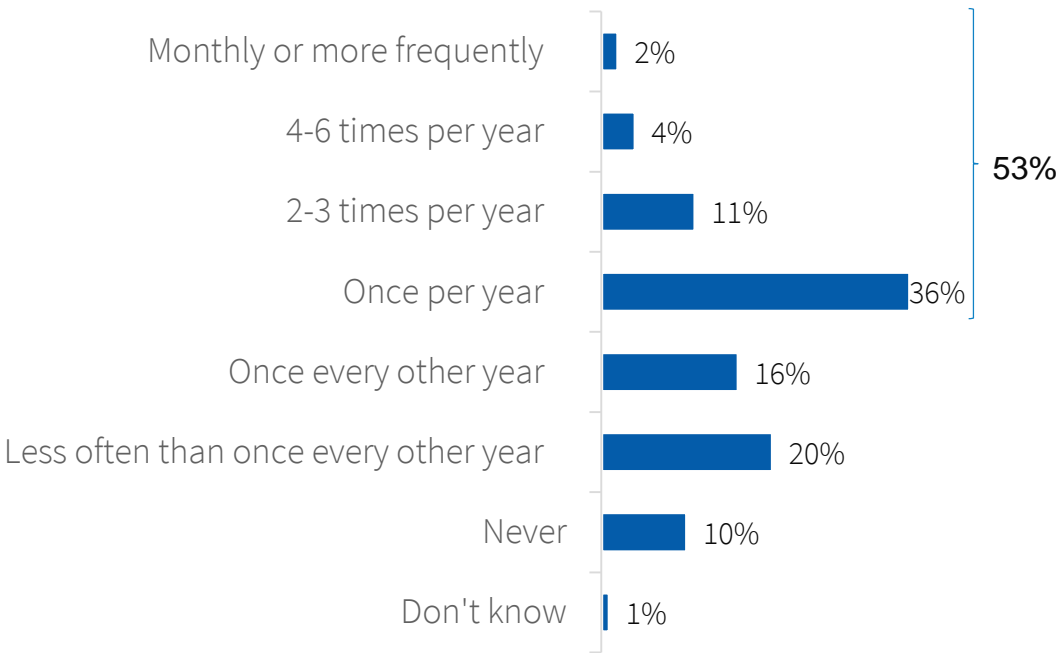
People with Diabetes
Base: (D=129)



HALF OF AMERICANS SAY THEY VISIT AN EYE HEALTH PROFESSIONAL AT LEAST ONCE A YEAR.

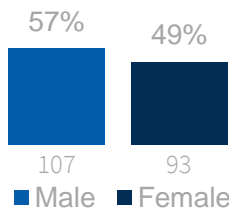
How frequently do you visit an [eye health professional]?

Total
Base: (n=1000)

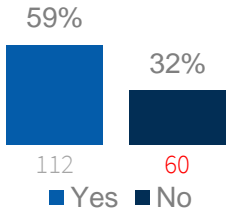


% At least once per year

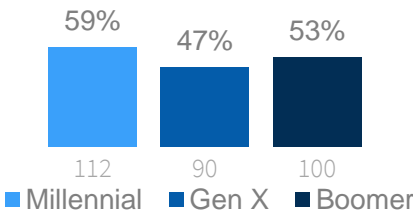
Gender
Base: (M=491) (F=509)



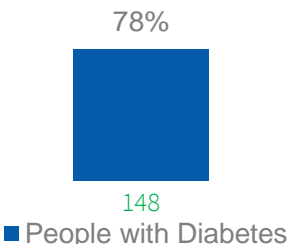
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

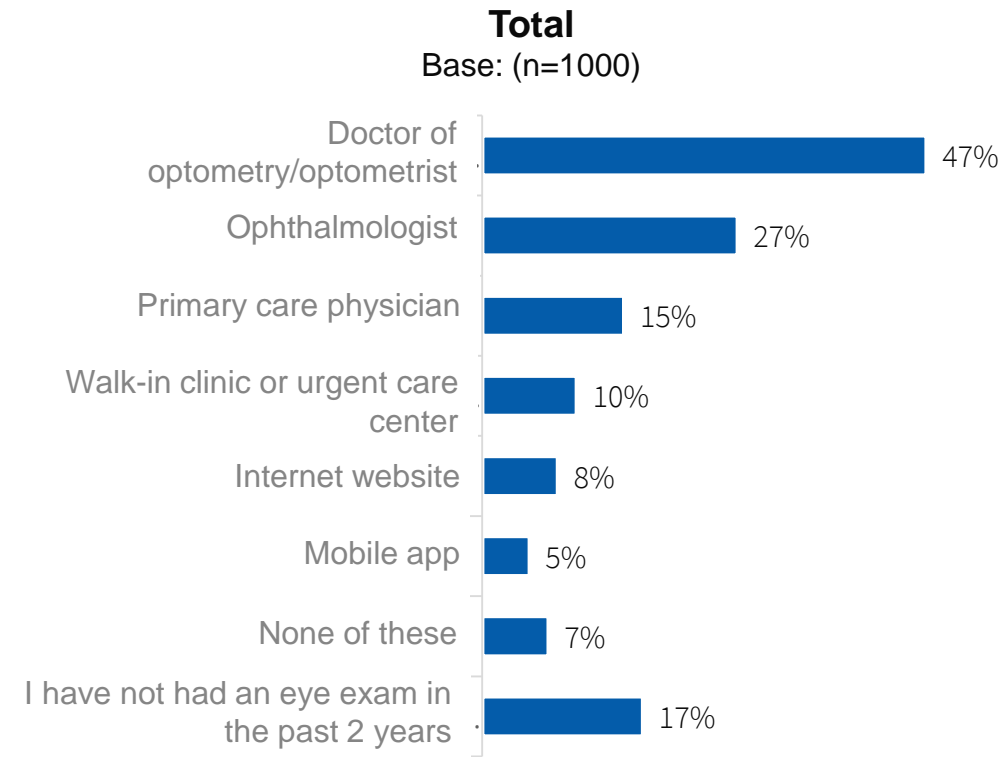


People with Diabetes
Base: (D=129)

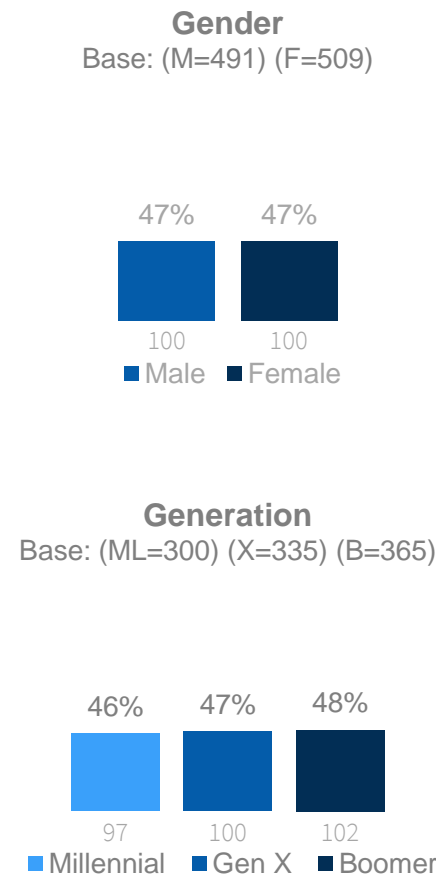


NEARLY HALF OF AMERICANS HAVE VISITED A DOCTOR OF OPTOMETRY FOR A VISION/EYE EXAM IN THE PAST TWO YEARS.

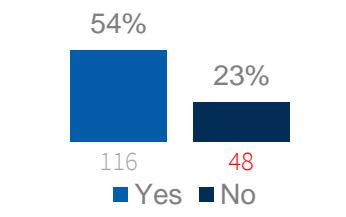
Which of the following have you visited/used within the past two years for a vision/eye exam? Please select all that apply.



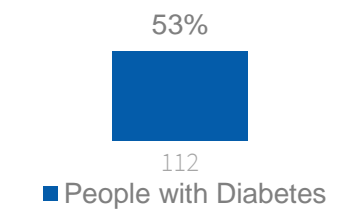
% Doctor of optometry/optometrist



Corrective Eye Wear
Base: (Y=769) (N=231)



People with Diabetes
Base: (D=129)



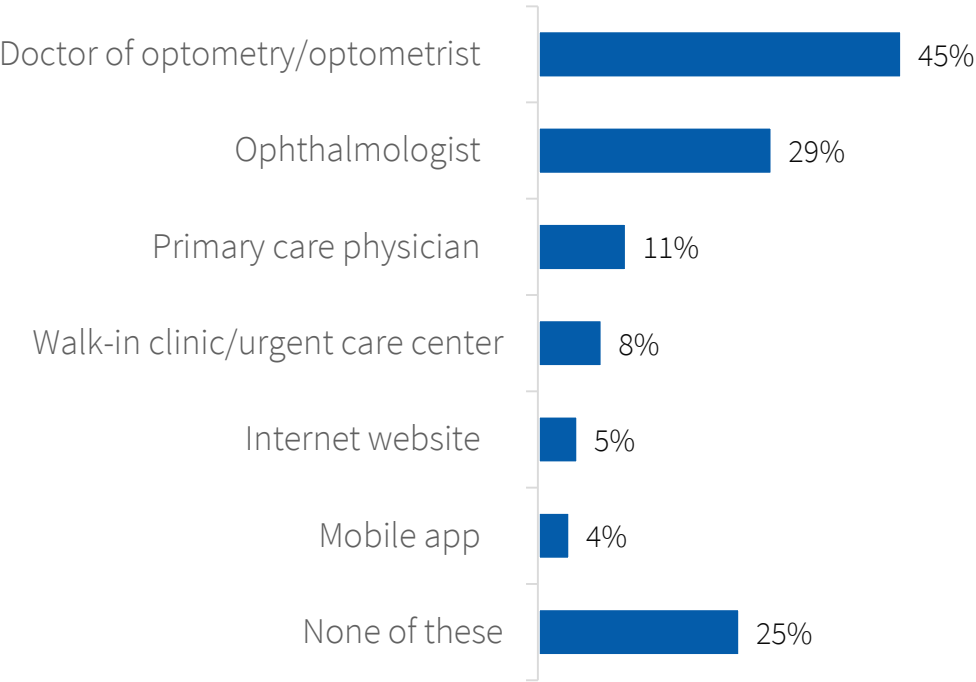
Q7. Which of the following have you visited/used within the past two years for a vision/eye exam? Please select all that apply.

A SIMILAR NUMBER (45%) HAVE VISITED A DOCTOR OF OPTOMETRY FOR A COMPREHENSIVE EYE EXAM IN THE PAST TWO YEARS.

A comprehensive eye exam includes tests that go beyond just vision screening. Which of the following have you visited/used within the past two years for a comprehensive eye exam? *Please select all that apply.*

Total

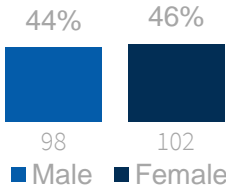
Base: (n=1000)



% Doctor of optometry/optometrist

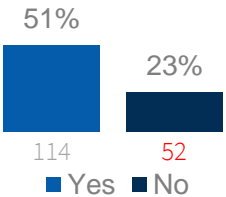
Gender

Base: (M=491) (F=509)



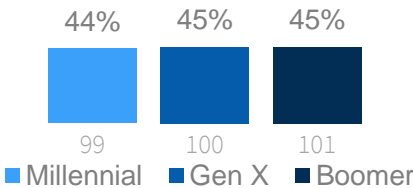
Corrective Eye Wear

Base: (Y=769) (N=231)



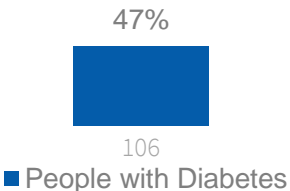
Generation

Base: (ML=300) (X=335) (B=365)



People with Diabetes

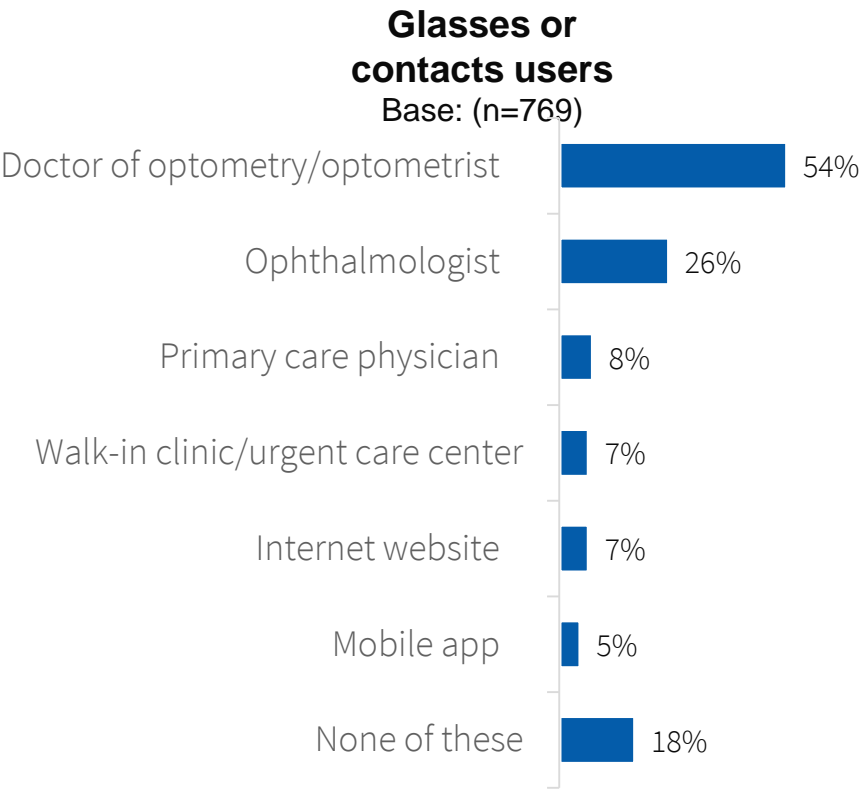
Base: (D=129)



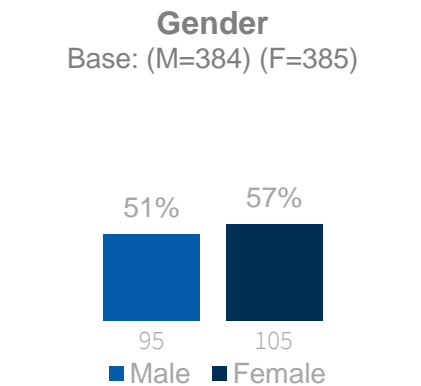
Q8. A comprehensive eye exam includes tests that go beyond just vision screening. This can include an assessment of how well eyes work together and eye disease diagnosis, among other things. Which of the following have you visited/used within the past two years for a comprehensive eye exam? Please select all that apply.

HALF OF PRESCRIPTION EYEWEAR USERS HAVE VISITED AN OPTOMETRIST FOR UPDATED PRESCRIPTIONS IN THE PAST TWO YEARS.

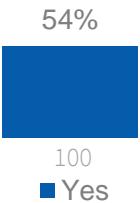
Which of the following have you visited/used within the past two years to update your prescription for corrective lenses? *Please select all that apply.*



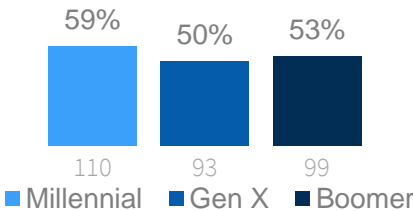
% Doctor of optometry/optometrist



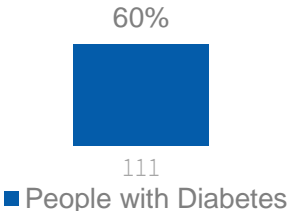
Corrective Eye Wear
Base: (Y=769)



Generation
Base: (ML=211) (X=243) (B=315)

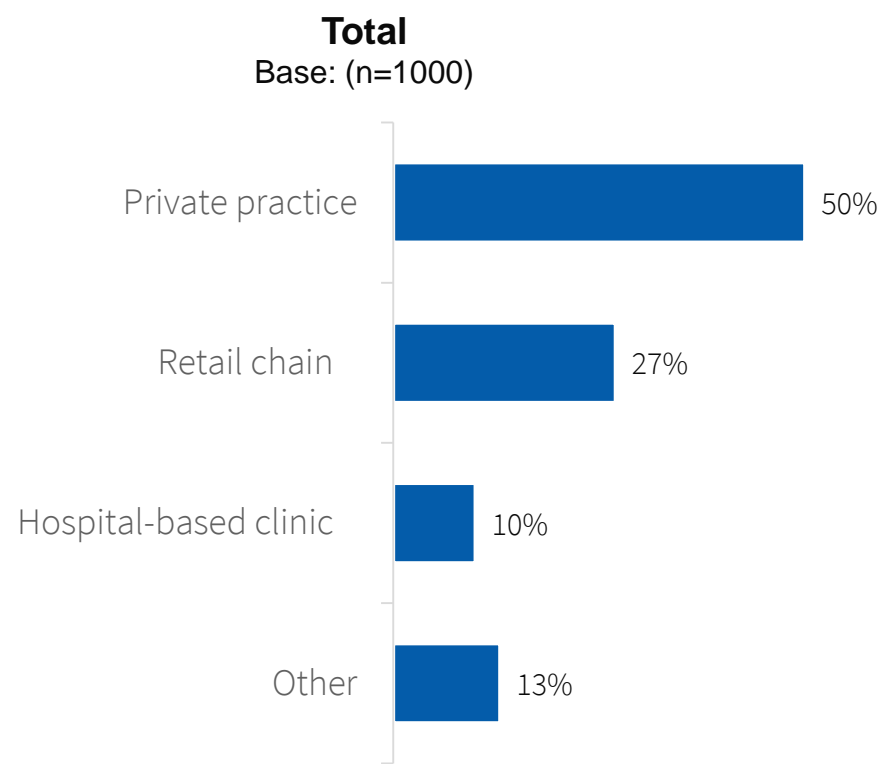


People with Diabetes
Base: (D=110)

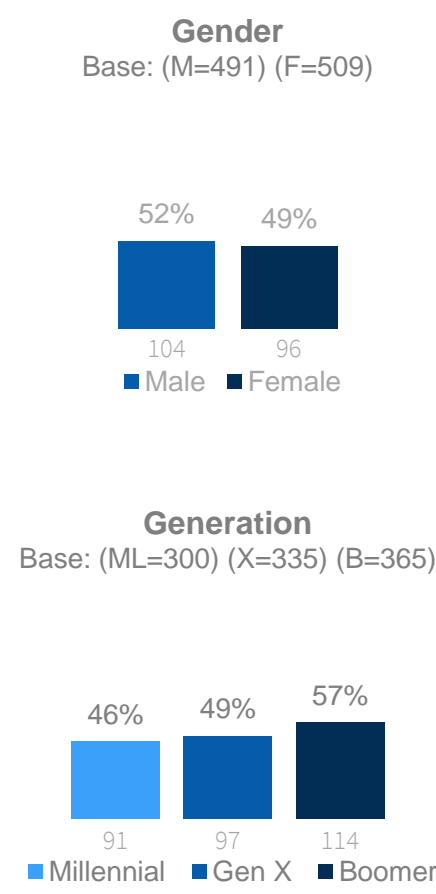


HALF OF AMERICANS HAVE VISITED A PRIVATE PRACTICE FOR A COMPREHENSIVE EYE EXAM OR FOR AN UPDATED PRESCRIPTION IN THE PAST TWO YEARS.

Which of the following best describes the type of practice you've visited in the past two years for a comprehensive eye exam or to update your prescription for corrective lenses?

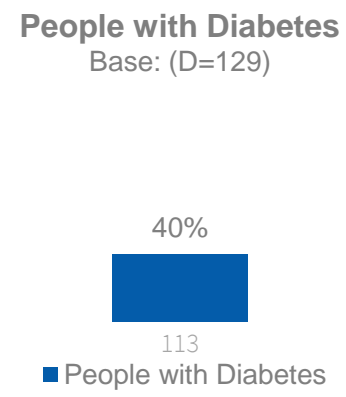
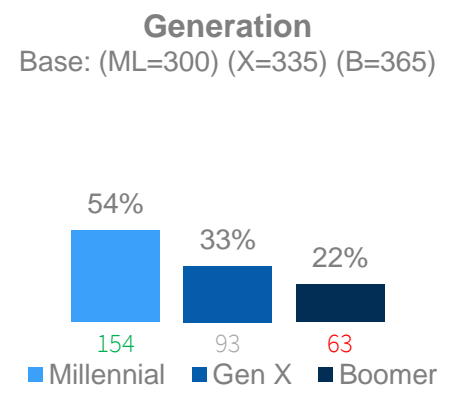
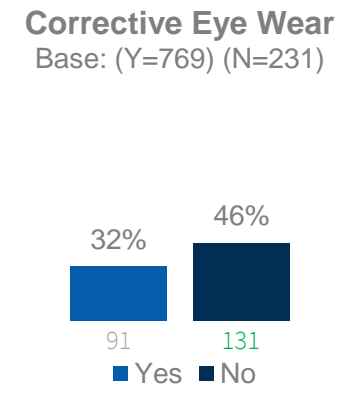
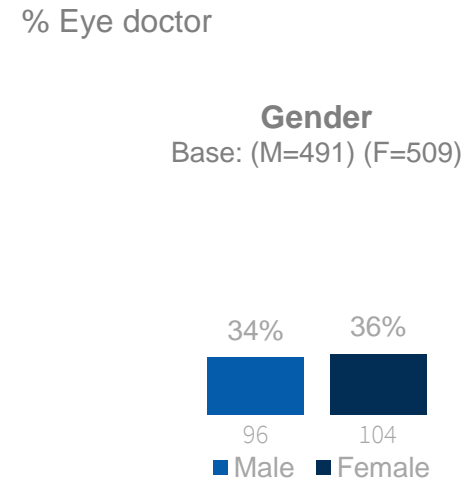
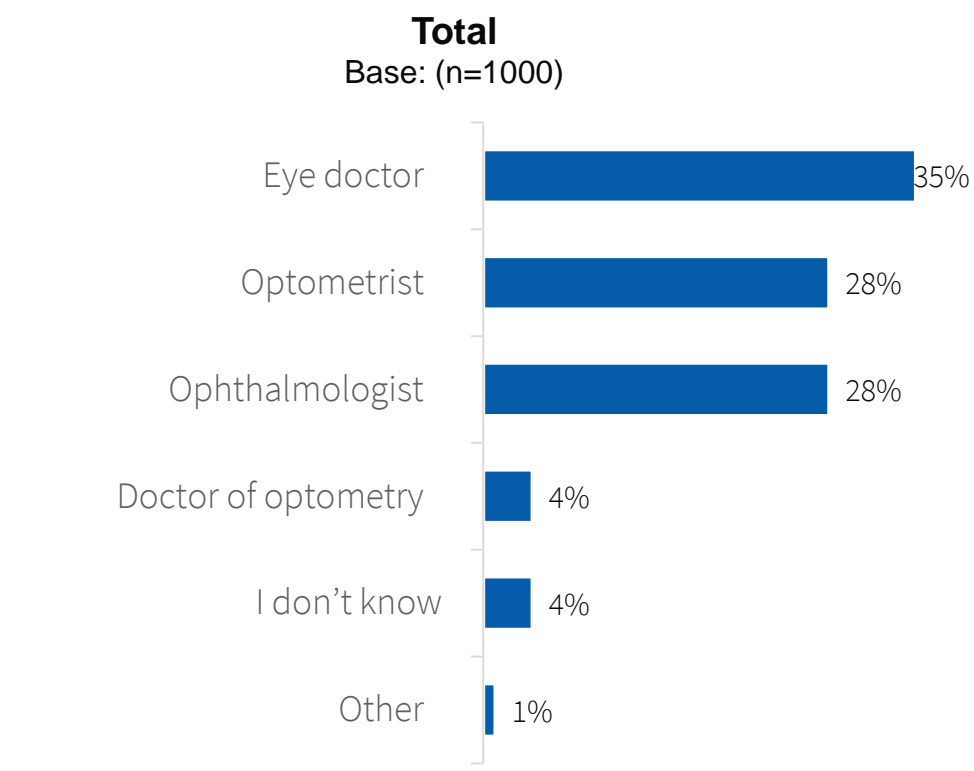


% Private practice



“EYE DOCTOR” IS THE MOST COMMONLY USED TERM TO DESCRIBE AN EYE HEALTH CARE PROVIDER.

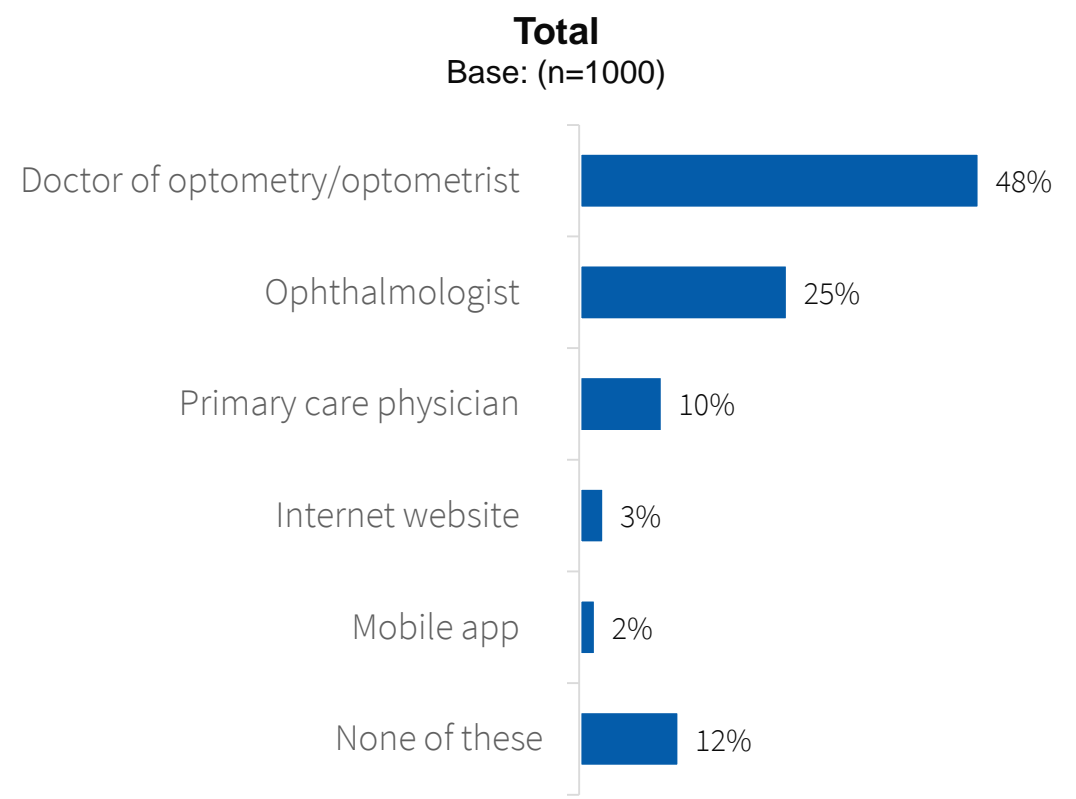
Which of the following terms do you most commonly use to describe the type of health care provider who provides diagnosis/treatment of eye diseases?



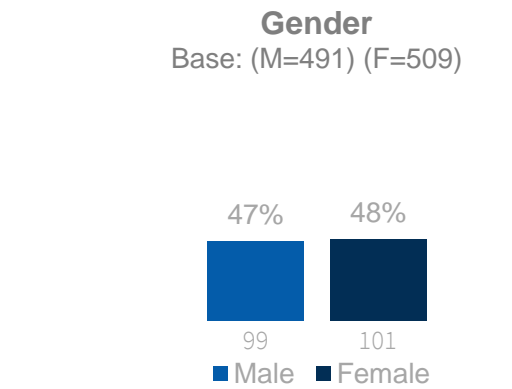
Q4. Now we'd like you to think about where you go for diagnosis and treatment for your eyes. Which of the following terms do you most commonly use to describe the type of health care provider who provides diagnosis/treatment of eye diseases?

NEARLY HALF OF AMERICANS RELY ON DOCTORS OF OPTOMETRY TO MONITOR THE HEALTH OF THEIR EYES.

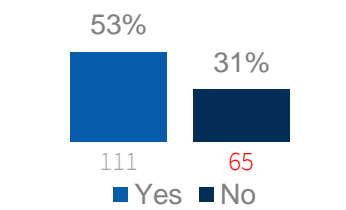
Which of the following do you primarily rely on to monitor the health of your eyes specifically?



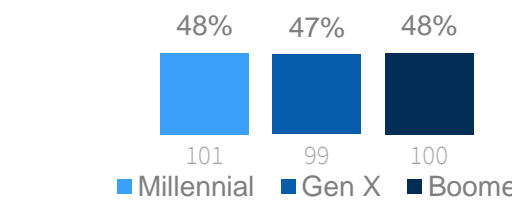
% Doctor of optometry/optometrist



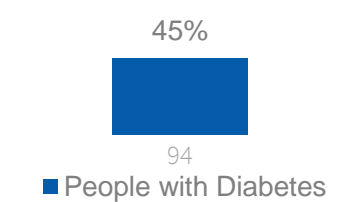
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



People with Diabetes
Base: (D=129)

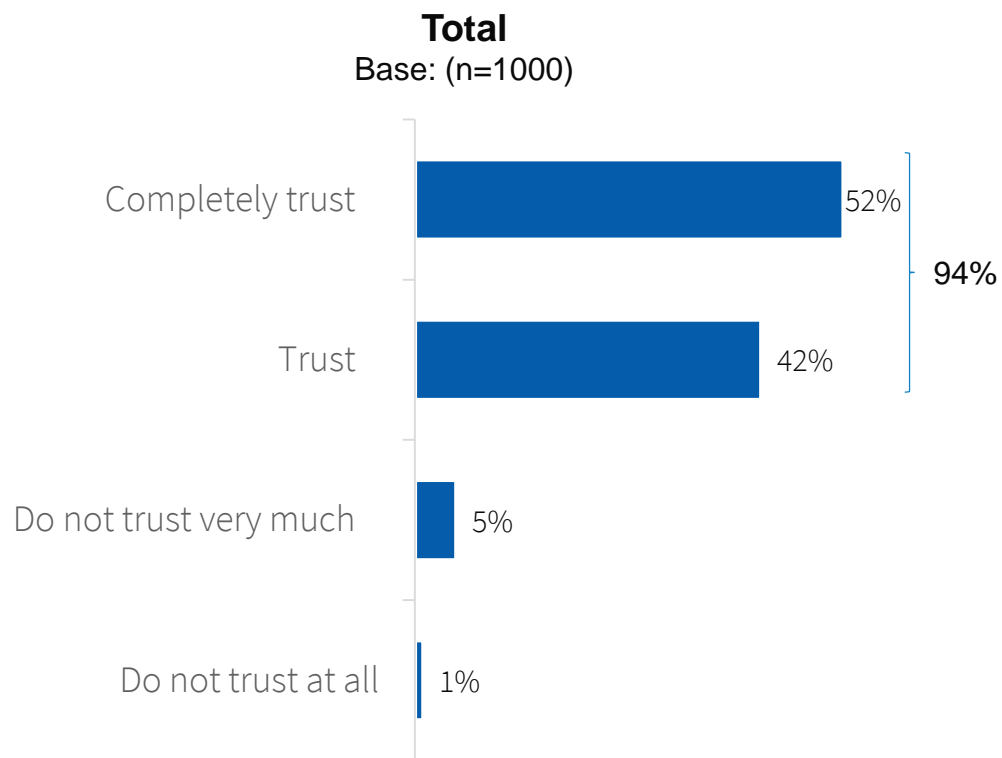


Q11. Which of the following do you primarily rely on to monitor the health of your eyes specifically?

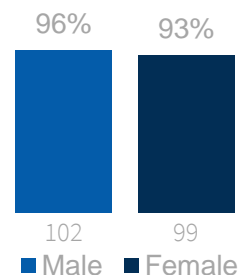
AMERICANS TRUST DOCTORS OF OPTOMETRY FOR ACCURATE AND RELIABLE INFORMATION ABOUT EYE HEALTH.

To what extent do you trust a doctor of optometry/optometrist for accurate and reliable information about eye health?

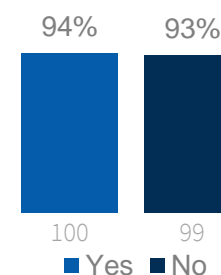
% Completely trust or trust



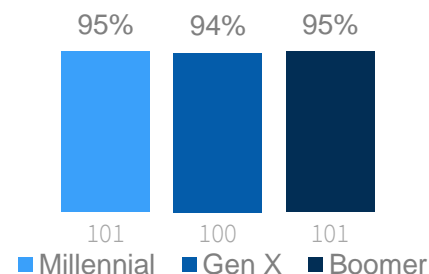
Gender
Base: (M=491) (F=509)



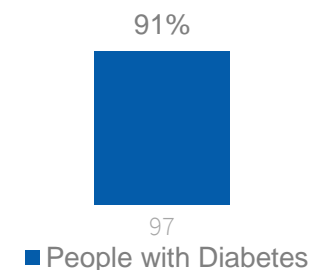
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

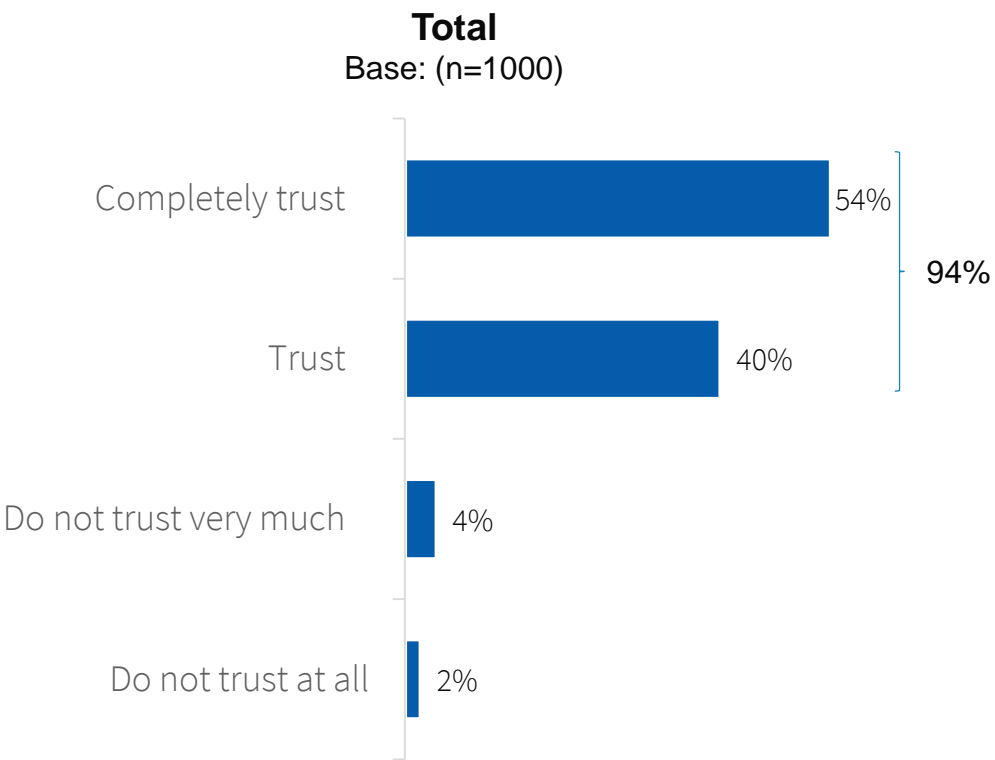


People with Diabetes
Base: (D=129)

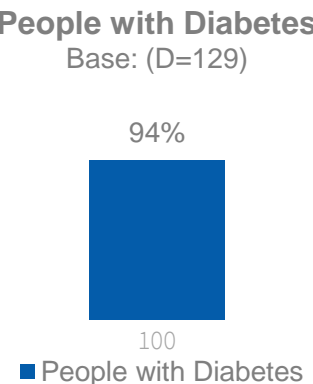
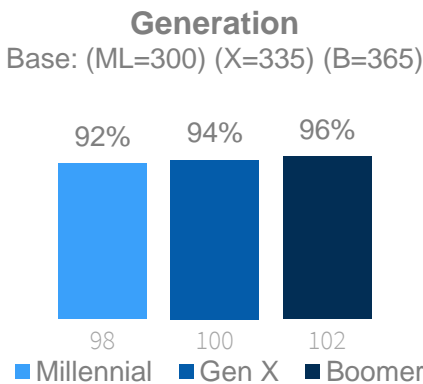
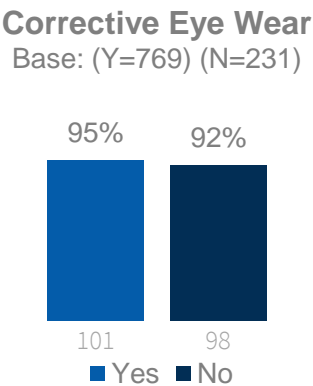
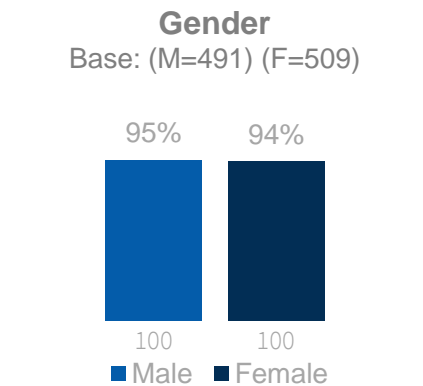


OPHTHALMOLOGISTS ARE ALSO A TRUSTED SOURCE FOR INFORMATION ABOUT EYE HEALTH.

To what extent do you trust an ophthalmologist for accurate and reliable information about eye health?

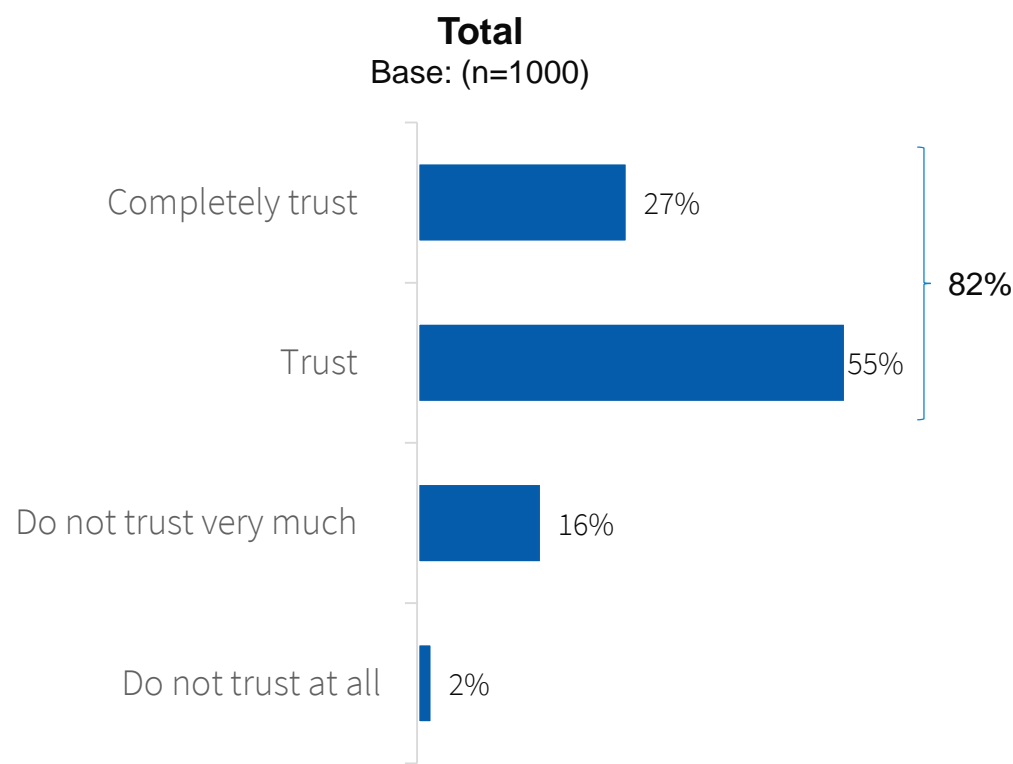


% Completely trust or trust

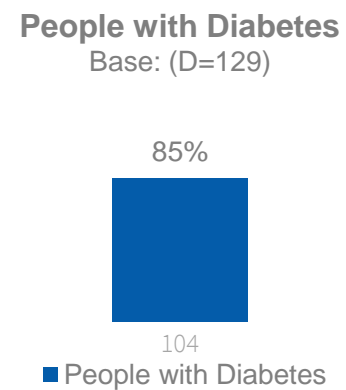
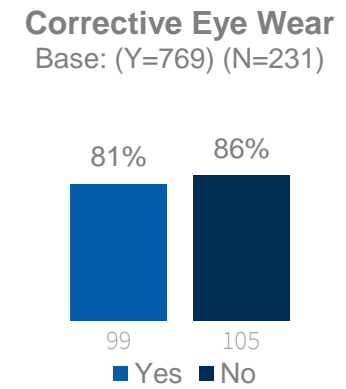
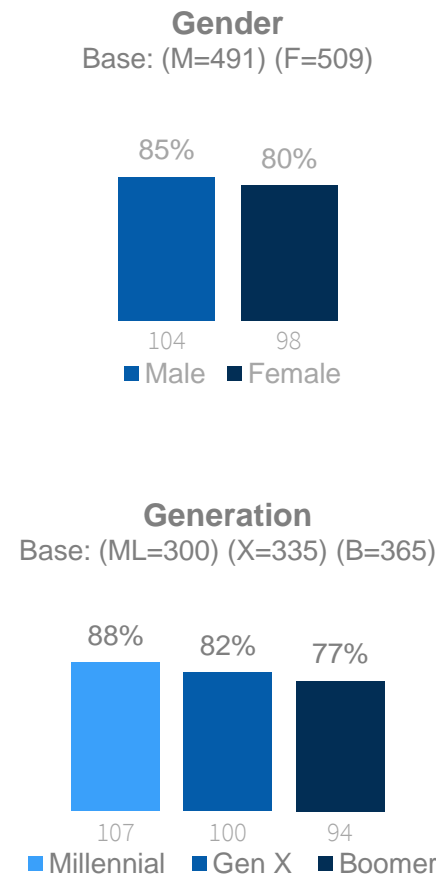


FOUR IN FIVE AMERICANS TRUST THEIR PRIMARY CARE PHYSICIANS TO PROVIDE RELIABLE EYE HEALTH INFORMATION.

To what extent do you trust a primary care physician for accurate and reliable information about eye health?



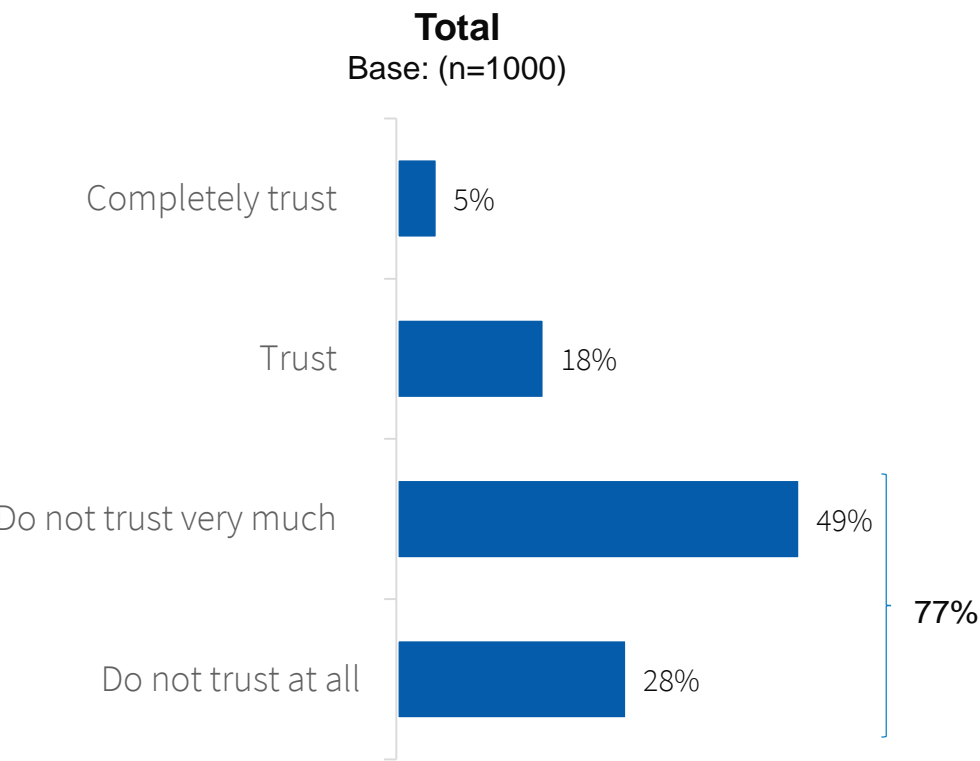
% Completely trust or trust



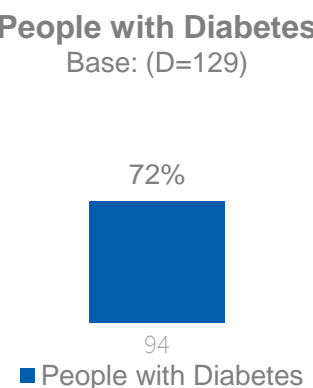
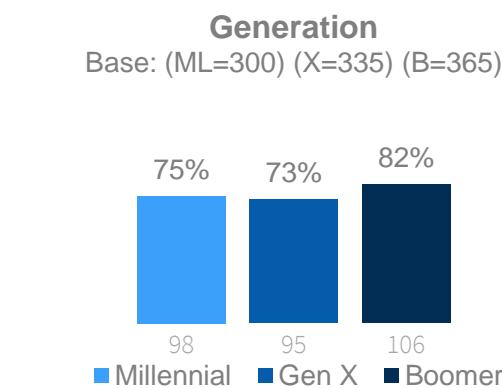
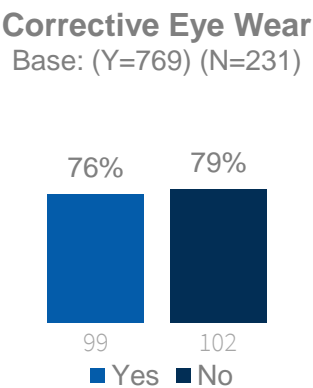
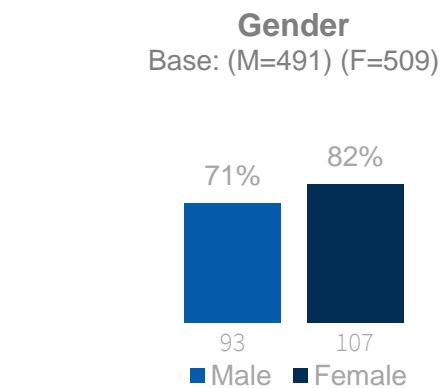
Q12. To what extent do you trust each of the following for accurate and reliable information about eye health? Primary care physician.

THREE-FOURTHS OF AMERICANS DO NOT TRUST THE INTERNET FOR RELIABLE INFORMATION ABOUT EYE HEALTH.

To what extent do you trust an internet website for accurate and reliable information about eye health?

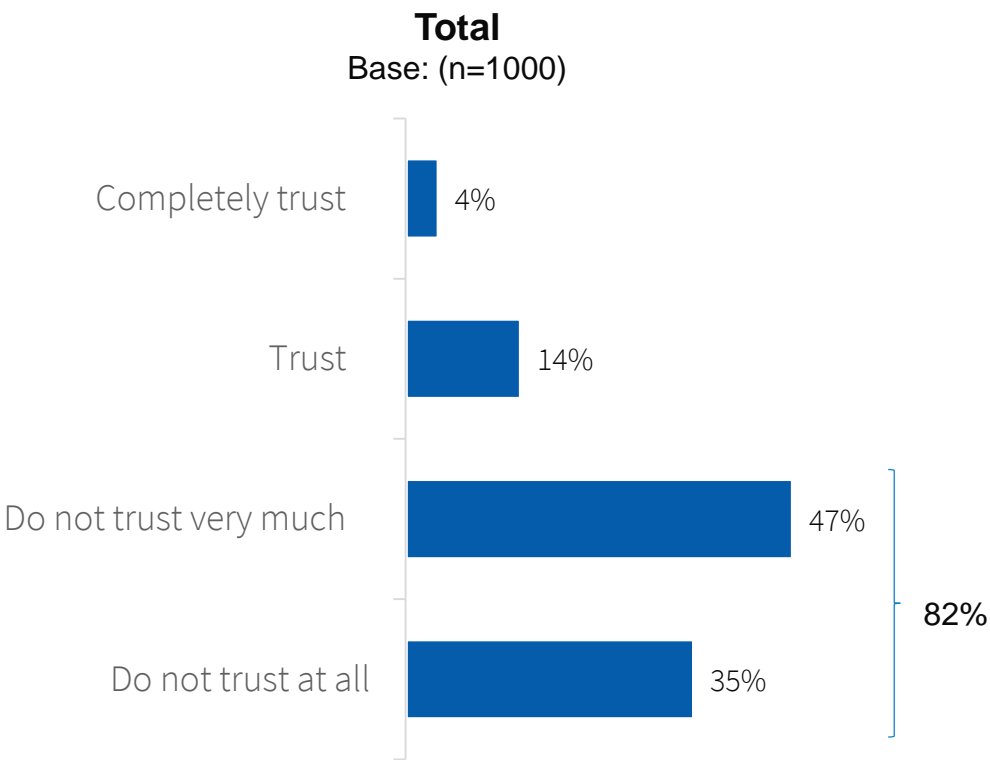


% Do not trust very much or do not trust at all



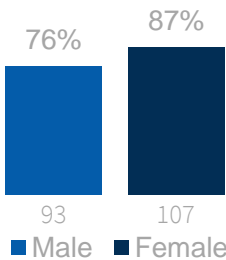
FOUR IN FIVE AMERICANS DO NOT TRUST MOBILE APPS FOR EYE HEALTH INFORMATION.

To what extent do you trust a mobile app for accurate and reliable information about eye health?

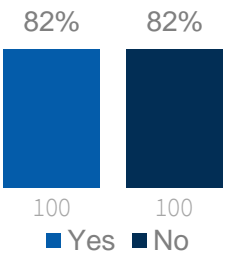


% Do not trust very much or do not trust at all

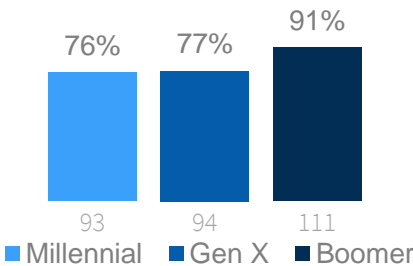
Gender
Base: (M=491) (F=509)



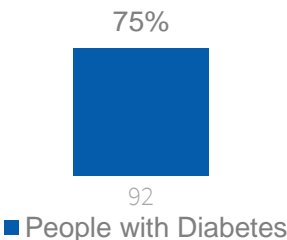
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

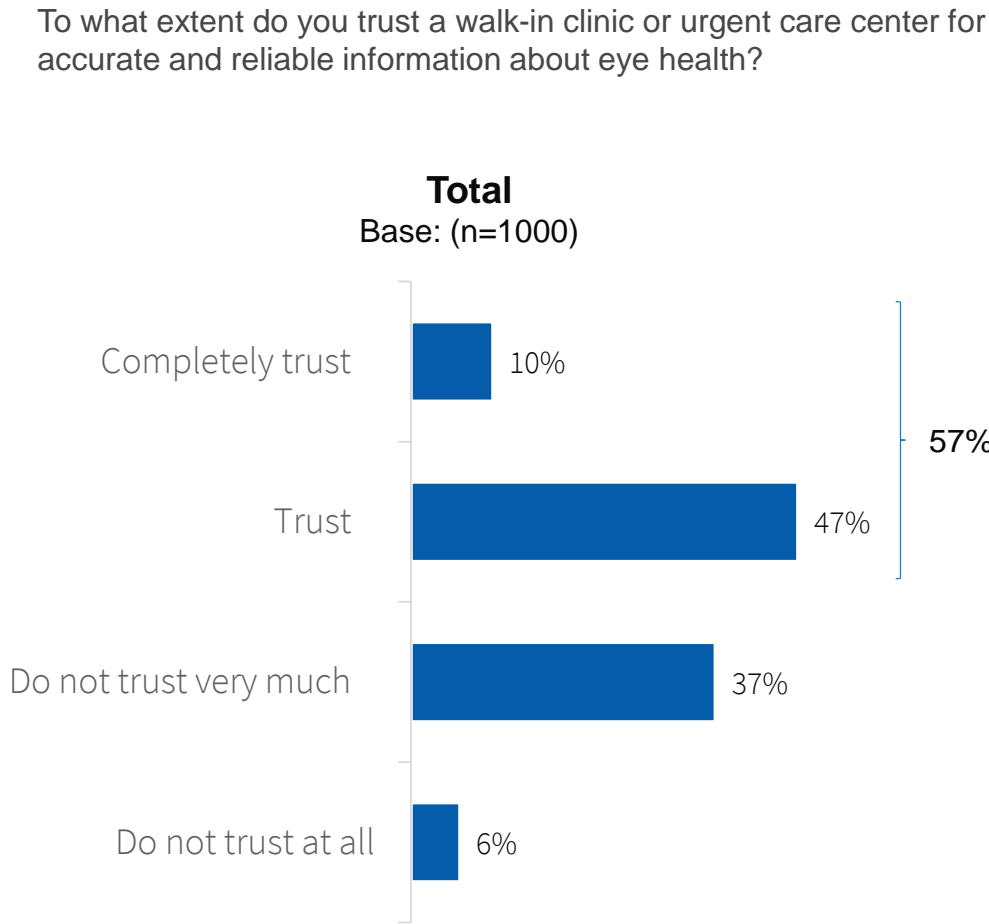


People with Diabetes
Base: (D=129)

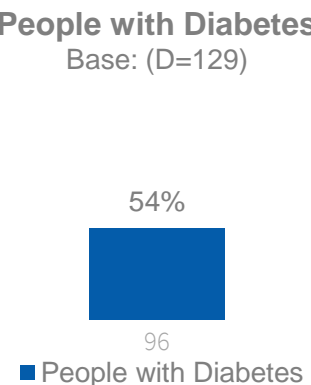
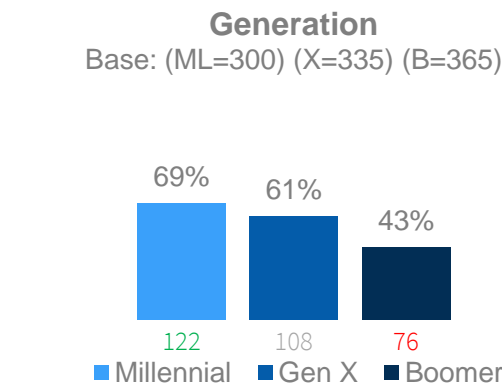
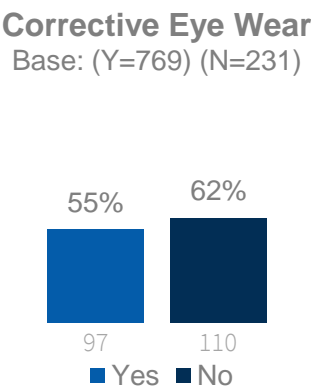
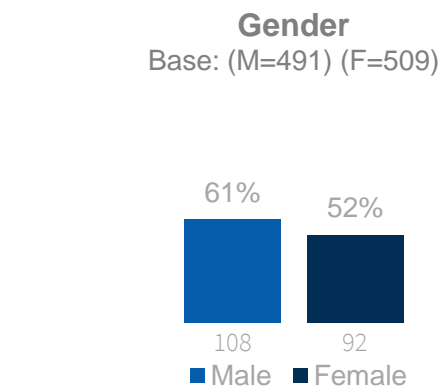


ALMOST THREE IN FIVE AMERICANS TRUST WALK-IN CLINICS OR URGENT CARE CENTERS FOR EYE HEALTH INFORMATION.

To what extent do you trust a walk-in clinic or urgent care center for accurate and reliable information about eye health?

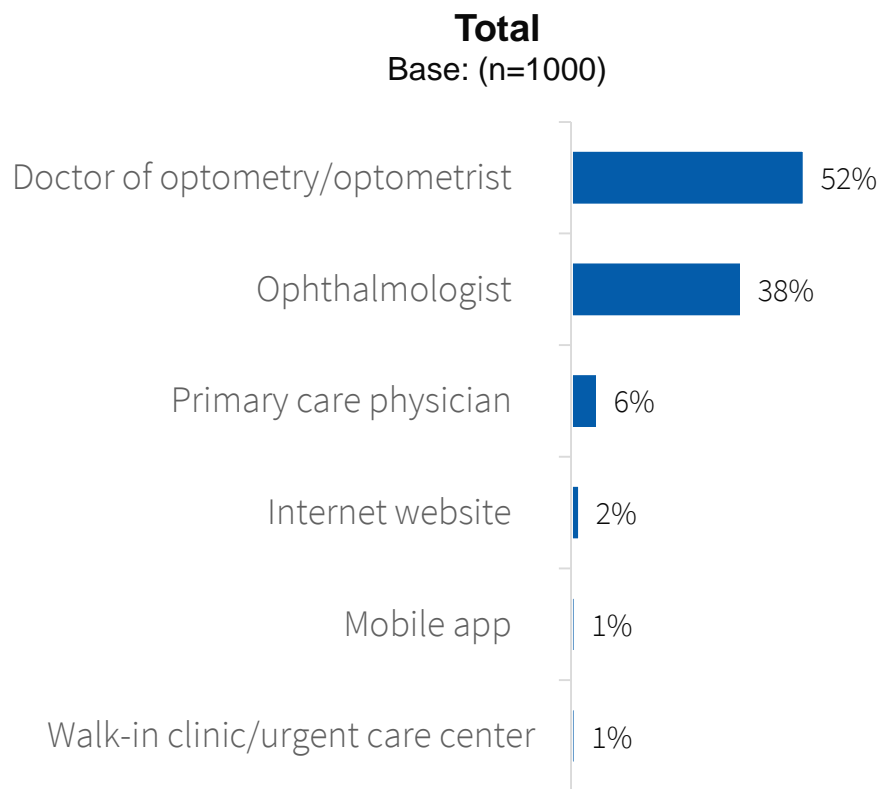


% Completely trust or trust



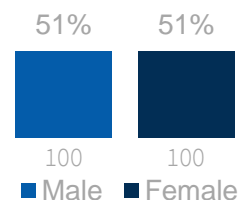
DOCTORS OF OPTOMETRY ARE THE MOST TRUSTED SOURCE FOR ACCURATE AND RELIABLE EYE HEALTH INFORMATION.

Which of the following do you trust most for accurate and reliable information about eye health?

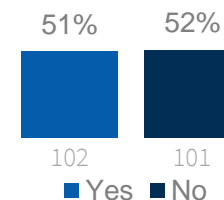


% Doctor of optometry/optometrist

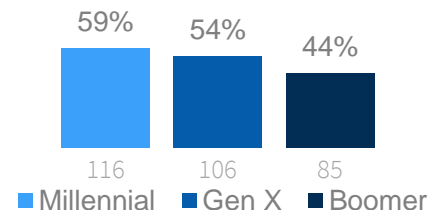
Gender
Base: (M=491) (F=509)



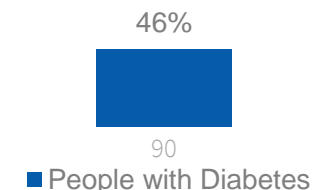
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

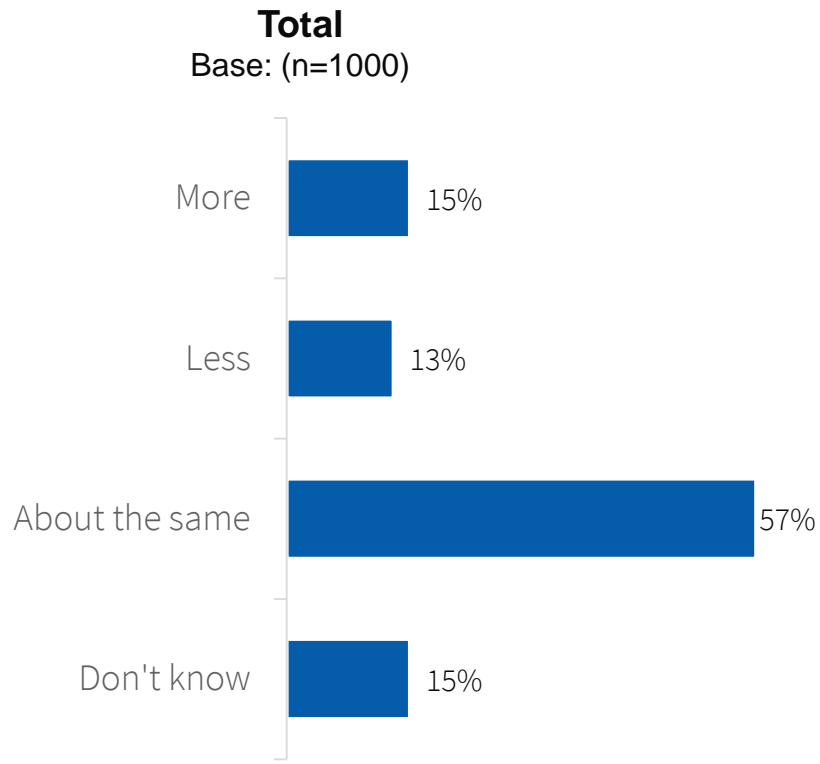


People with Diabetes
Base: (D=129)

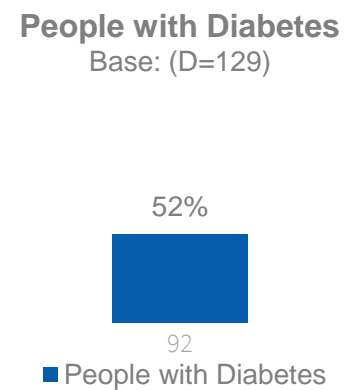
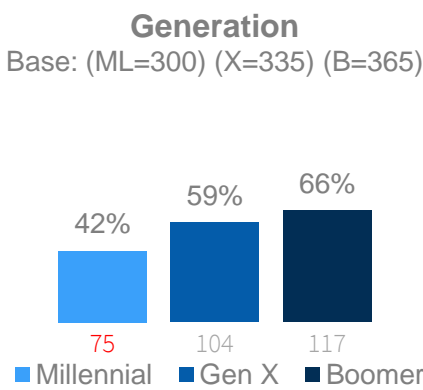
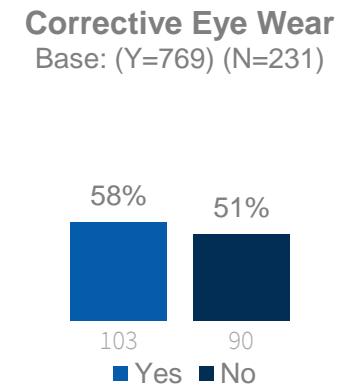
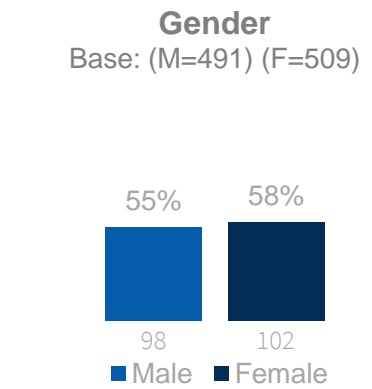


OVER HALF OF AMERICANS HAVE SEEN ABOUT THE SAME AMOUNT OF EYE HEALTH NEWS COVERAGE AS THEY DID LAST YEAR.

Lastly, thinking about this time last year, have you seen more or less information about eye health in the news in the past year?



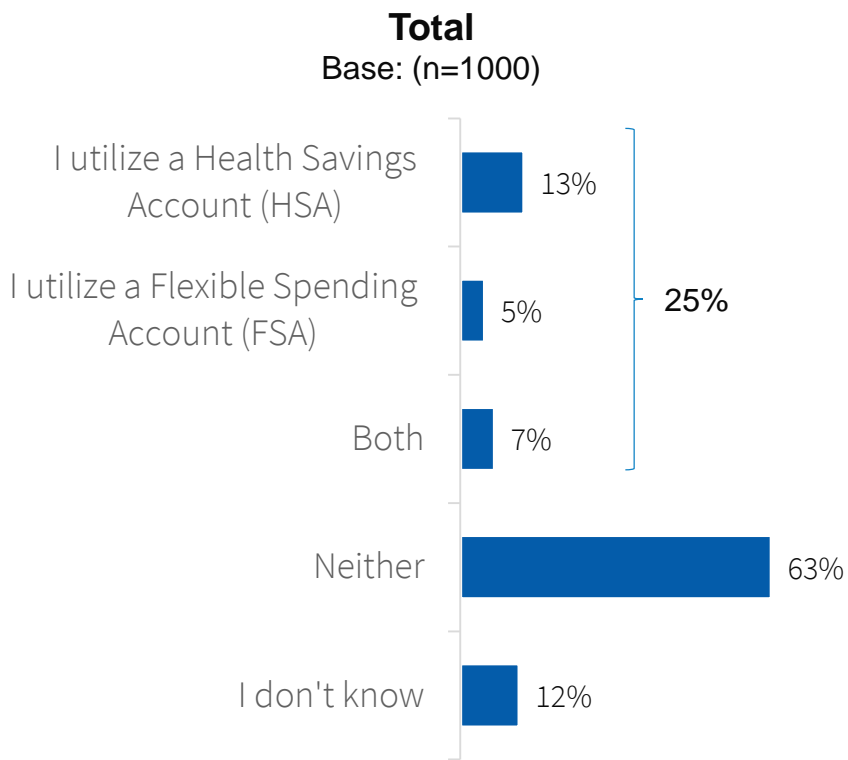
% About the same



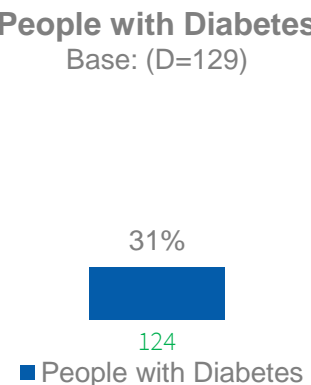
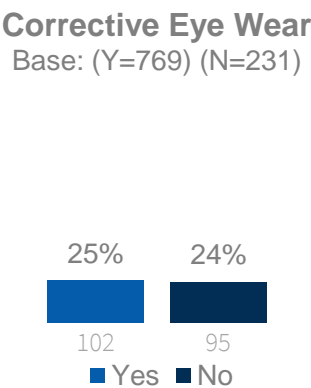
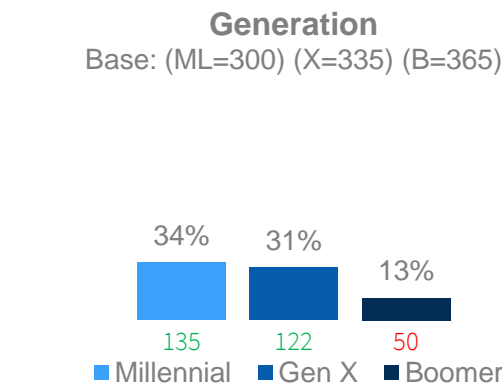
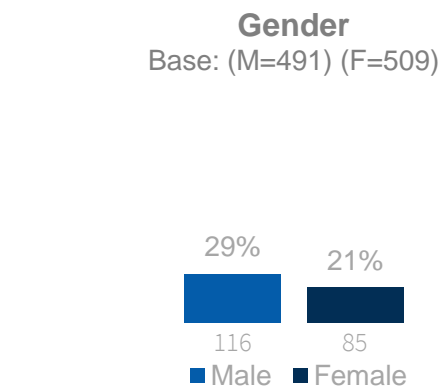
Q15. Lastly, thinking about this time last year, have you seen more or less information about eye health in the news in the past year?

A QUARTER OF AMERICANS REPORT USING EITHER A FLEXIBLE SPENDING ACCOUNT, A HEALTH SAVINGS ACCOUNT, OR BOTH.

With your current health insurance plan, do you utilize the option of a Health Savings Account (HSA) or a Flexible Spending Account (FSA)?

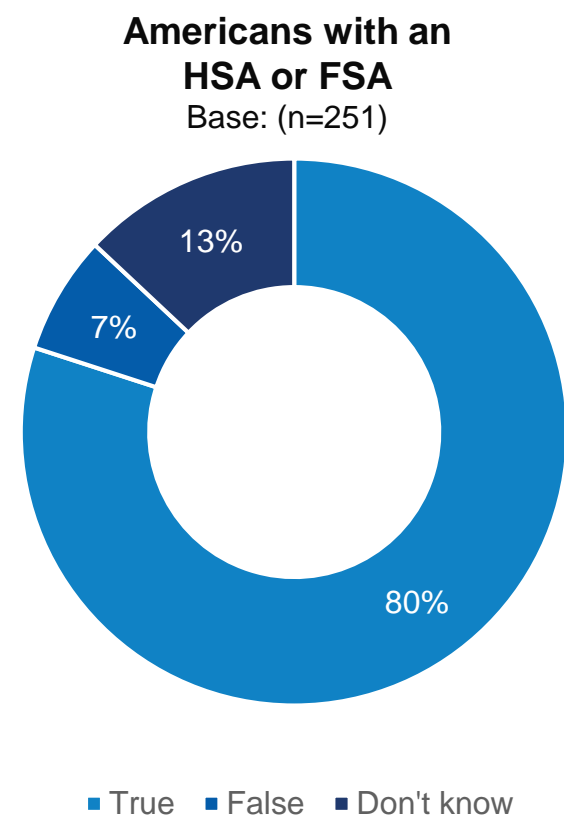


% Utilize FSA, HSA, or both

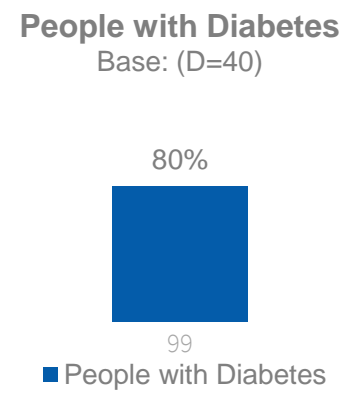
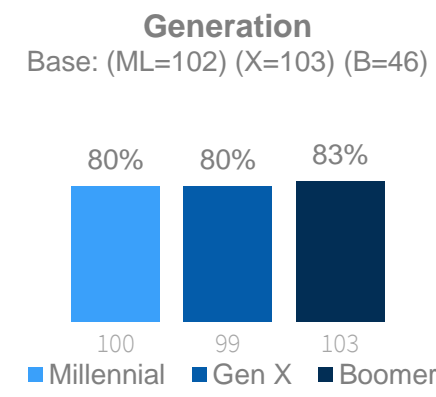
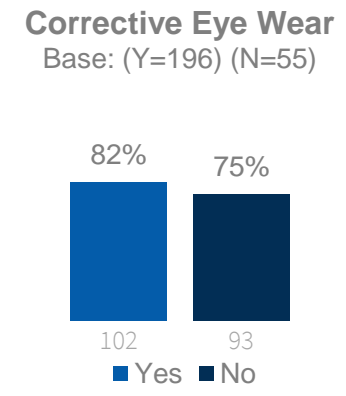
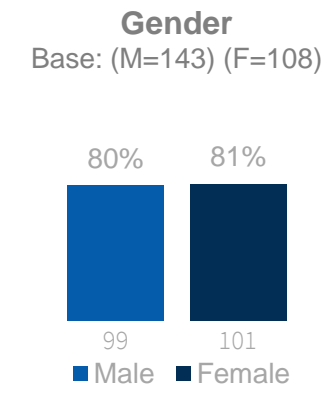


FOUR IN FIVE AMERICANS WITH AN HSA/FSA KNOW THE FUNDS CAN COVER A COMPREHENSIVE EYE EXAM.

“HSA/FSA funds may be used to pay for a comprehensive eye exam.” Please indicate whether this statement is true or false.



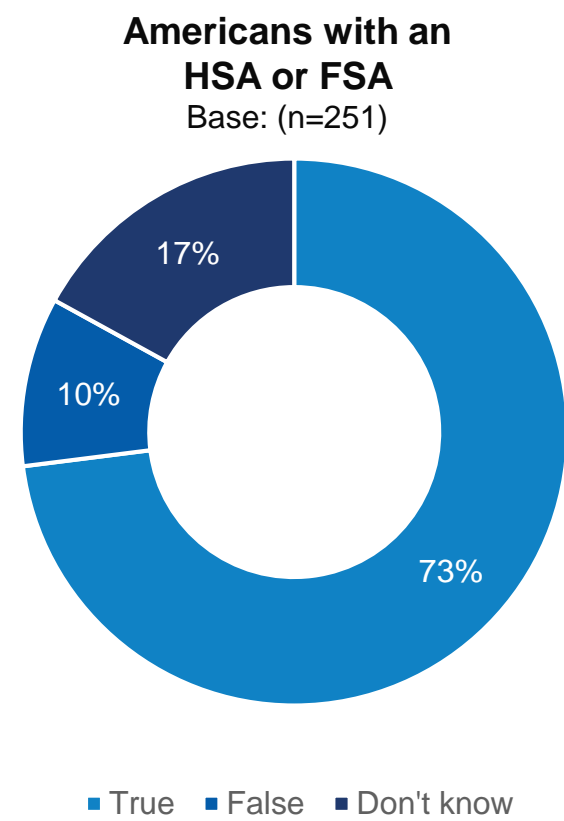
% True



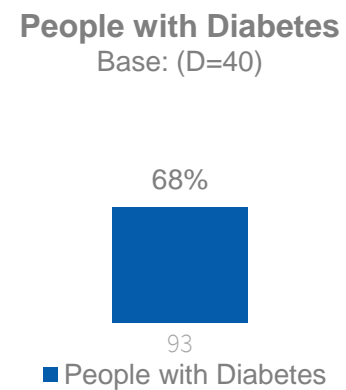
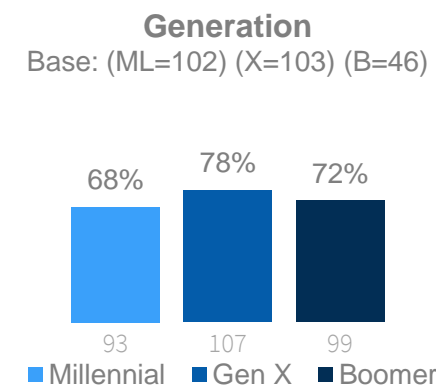
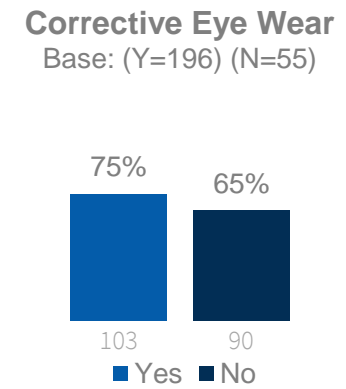
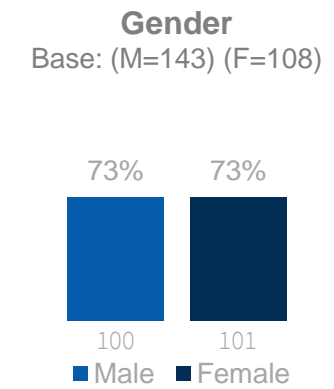
Q17. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." A. HSA/FSA funds may be used to pay for a comprehensive eye exam

NEARLY THREE-FOURTHS OF AMERICANS WITH AN HSA/FSA KNOW THE FUNDS CAN COVER GLASSES LENSES.

“HSA/FSA funds may be used to pay for glasses lenses.” Please indicate whether this statement is true or false.



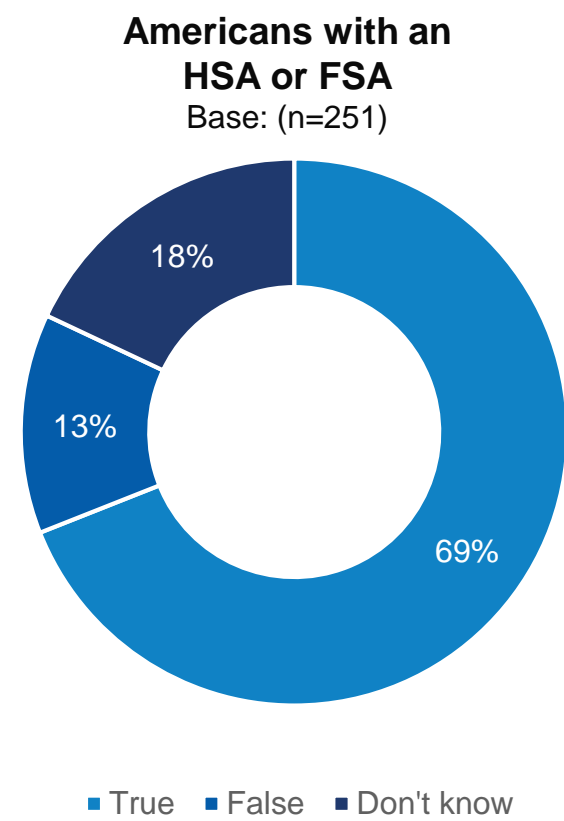
% True



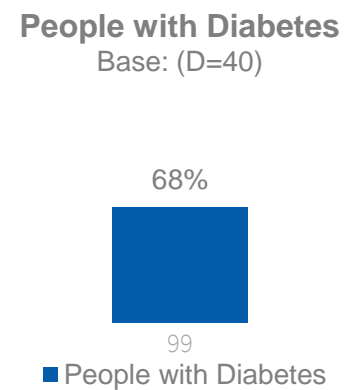
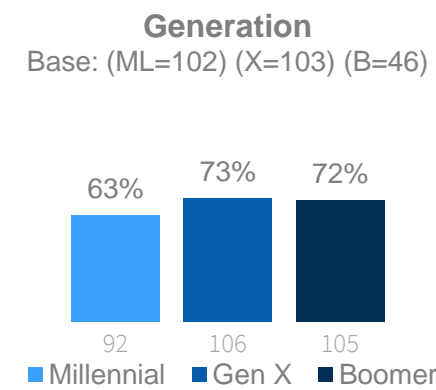
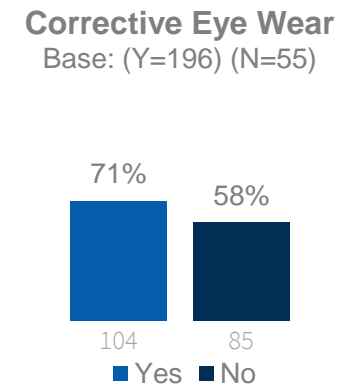
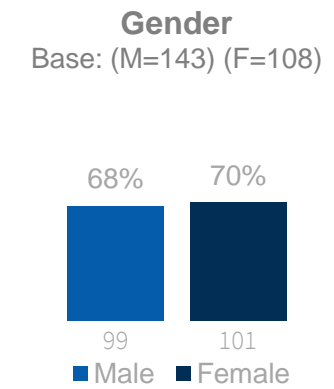
Q17. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." B. HSA/FSA funds may be used to pay for glasses lenses

SEVEN IN TEN AMERICANS WITH AN HSA/FSA KNOW THE FUNDS CAN BE USED TO PAY FOR GLASSES FRAMES.

“HSA/FSA funds may be used to pay for glasses frames.” Please indicate whether this statement is true or false.



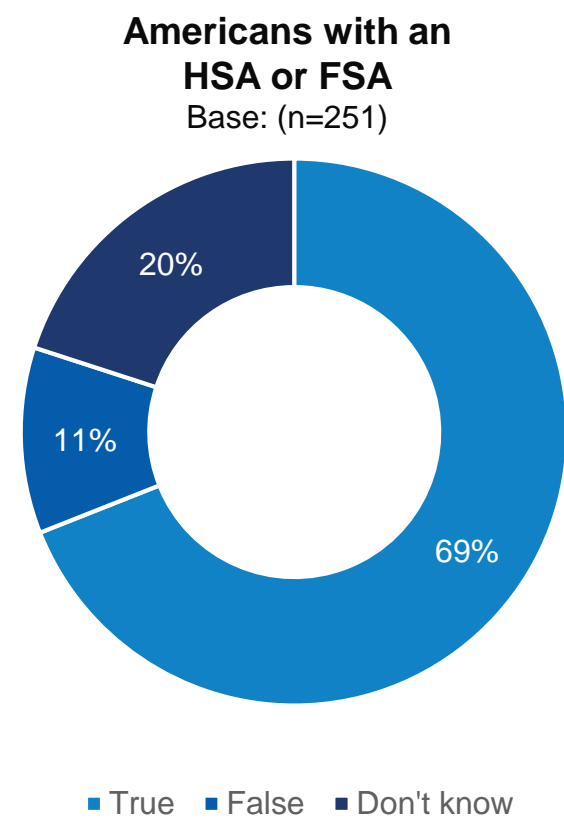
% True



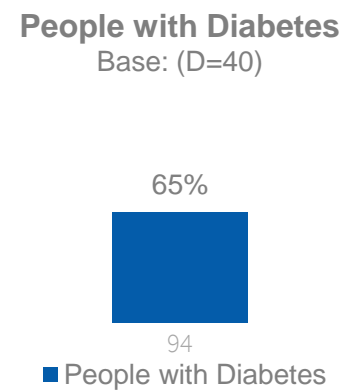
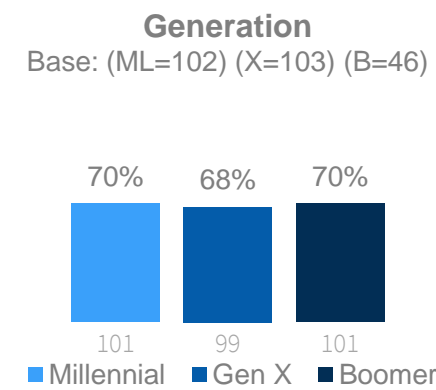
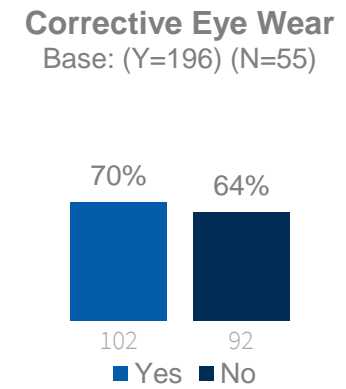
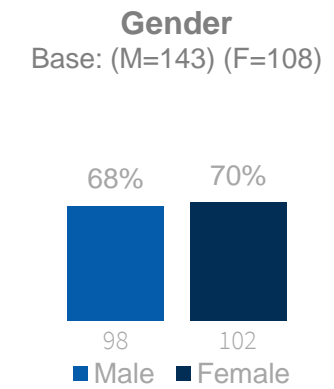
Q17. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." C.HSA/FSA funds may be used to pay for glasses frames

SIMILARILY, SEVEN IN TEN AMERICANS WITH AN HSA/FSA KNOW THE FUNDS CAN BE USED TO PAY FOR CONTACT LENSES.

“HSA/FSA funds may be used to pay for contact lenses.” Please indicate whether this statement is true or false.



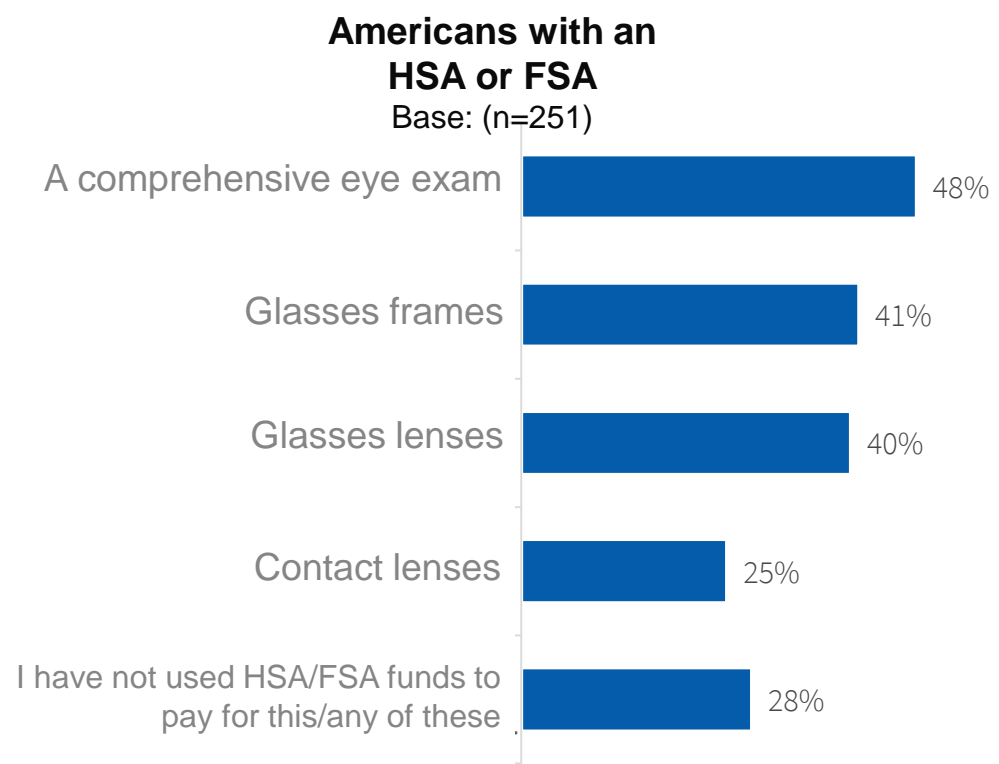
% True



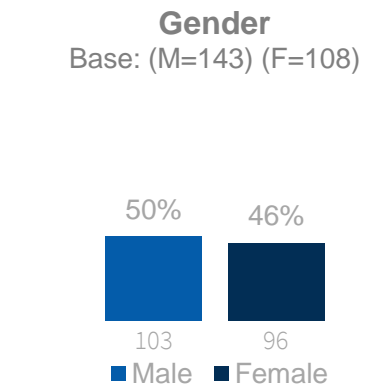
Q17. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." HSA/FSA funds may be used to pay for contact lenses.

NEARLY HALF OF AMERICANS WITH AN HSA/FSA HAVE USED THE FUNDS TO PAY FOR A COMPREHENSIVE EYE EXAM.

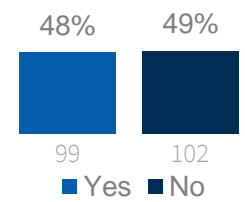
Have you ever used your HSA/FSA funds to pay for the following?
Please select all that apply.



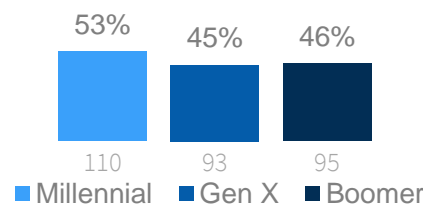
% Comprehensive eye exam



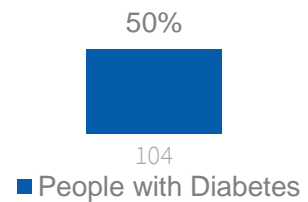
Corrective Eye Wear
Base: (Y=196) (N=55)



Generation
Base: (ML=102) (X=103) (B=46)



People with Diabetes
Base: (D=40)

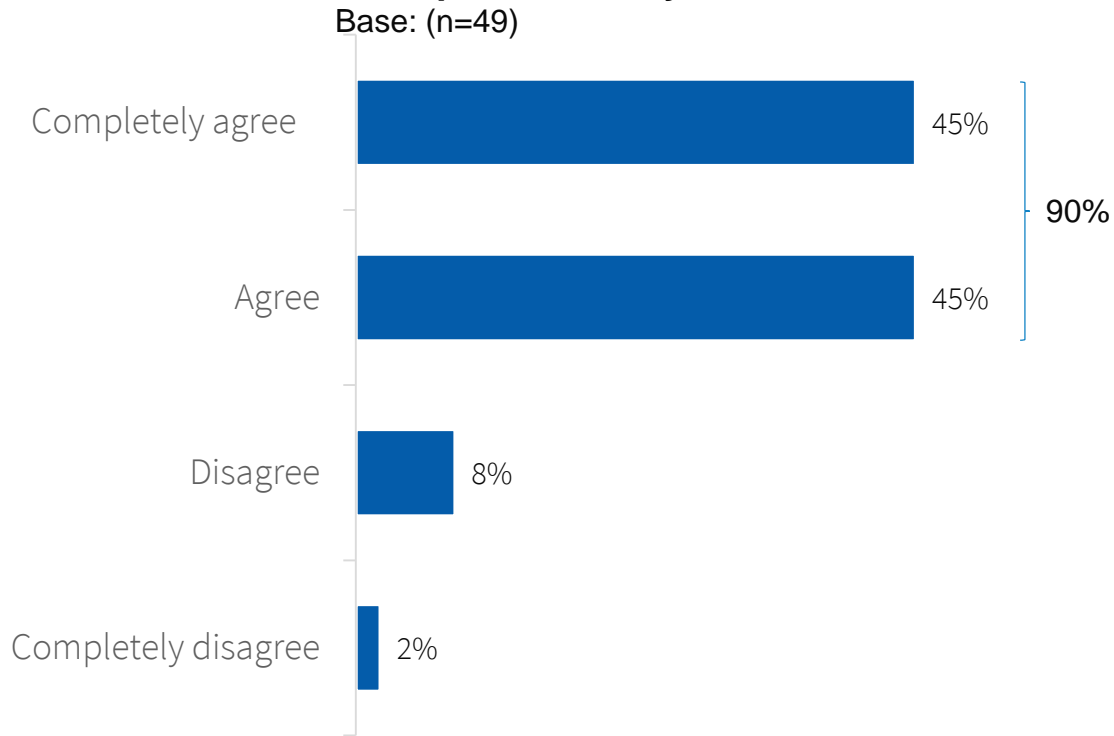


Q18. Have you ever used your HSA/FSA funds to pay for the following? Please select all that apply.

AMERICANS WHO DON'T KNOW THEY CAN USE THEIR HSA/FSA BENEFITS TO COVER A COMPREHENSIVE EYE EXAM AGREE THEY WOULD USE THE FUNDS TO PAY FOR THE EXAM IF IT WERE COVERED.

Have you ever visited an eye doctor “I would use my HSA/FSA funds to pay for a comprehensive eye exam if it were covered.” Please rate the extent to which you, personally, agree or disagree with following statement.

People with HSA/FSA who were unaware they could use their benefits toward a comprehensive eye exam



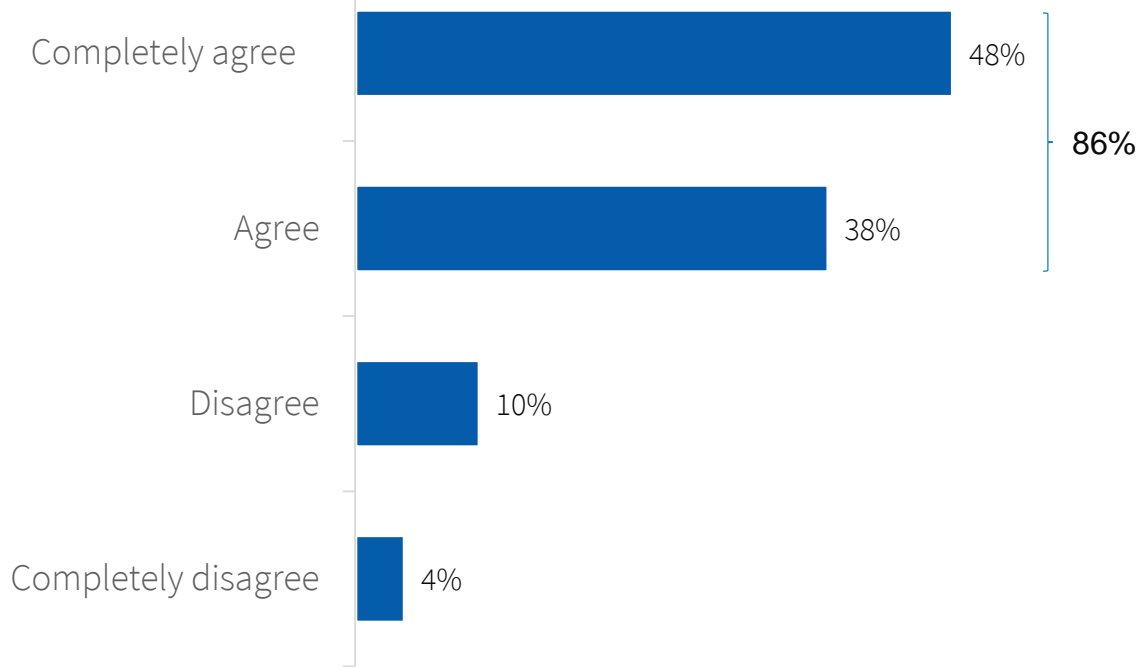
Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

AMERICANS WHO DON'T KNOW THEY CAN USE THEIR HSA/FSA BENEFITS TO PAY FOR GLASSES LENSES ALSO AGREE THEY WOULD USE THEIR FUNDS TO PAY FOR THE LENSES IF THEY WERE COVERED.

“I would use my HSA/FSA funds to pay for glasses lenses if they were covered.” Please rate the extent to which you, personally, agree or disagree with following statement.

People with HSA/FSA who wear corrective eyewear and were unaware they could use their benefits to pay for glasses lenses

Base: (n=50)

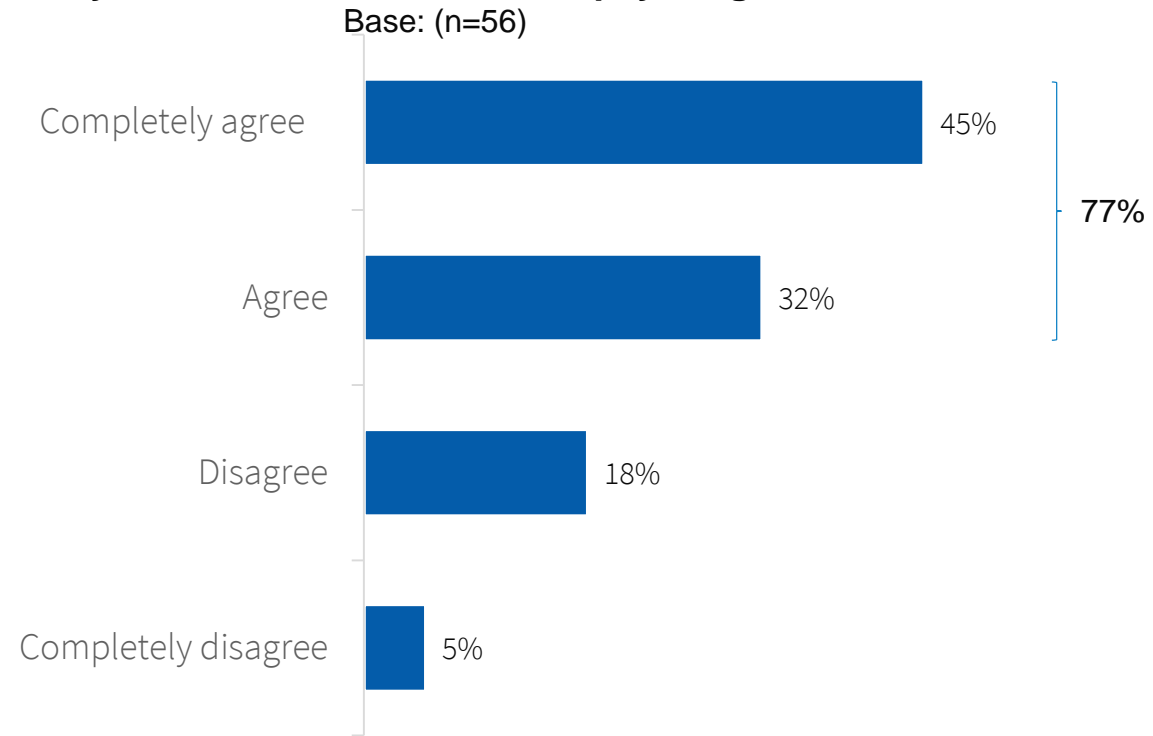


Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

OVER THREE-FOURTHS OF AMERICANS WHO DON'T KNOW THEIR HSA/FSA FUNDS CAN COVER GLASSES FRAMES WOULD USE THEIR FUNDS TO PAY FOR THE FRAMES IF THEY WERE COVERED.

“I would use my HSA/FSA funds to pay for glasses frames if they were covered.” Please rate the extent to which you, personally, agree or disagree with following statement.

People with HSA/FSA who wear corrective eyewear and were unaware they could use their benefits to pay for glasses frames

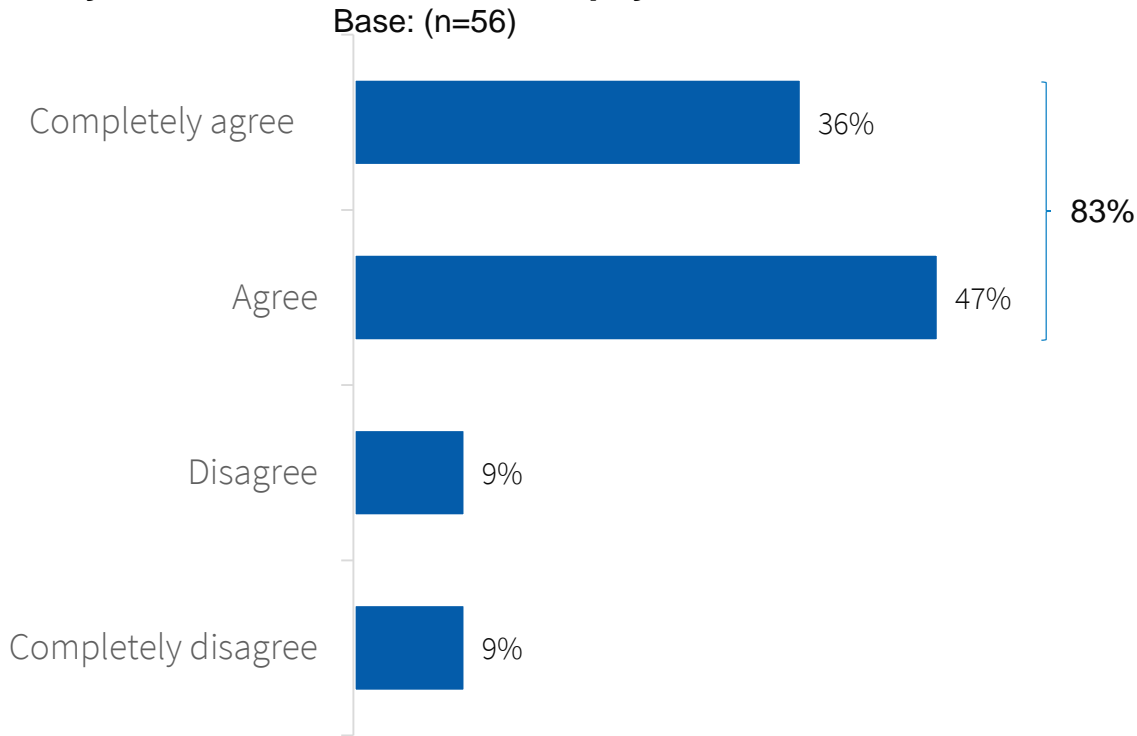


Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

FOUR IN FIVE AMERICANS WHO DON'T KNOW THEIR HSA/FSA FUNDS CAN COVER CONTACT LENSES WOULD USE THE FUNDS TO PAY FOR THEIR CONTACT LENSES IF THEY WERE COVERED.

“I would use my HSA/FSA funds to pay for contact lenses if they were covered.” Please rate the extent to which you, personally, agree or disagree with following statement.

People with HSA/FSA who wear corrective eyewear and were unaware they could use their benefits to pay for contact lenses



Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.



TRACKING QUESTIONS (SLIDES 7-42)



COMPREHENSIVE EYE EXAM (SLIDES 43-56)



PEDIATRICS (SLIDES 57-80)



DIABETES (SLIDES 81-100)



CONTACT LENSES AND GLASSES (SLIDES 101-135)

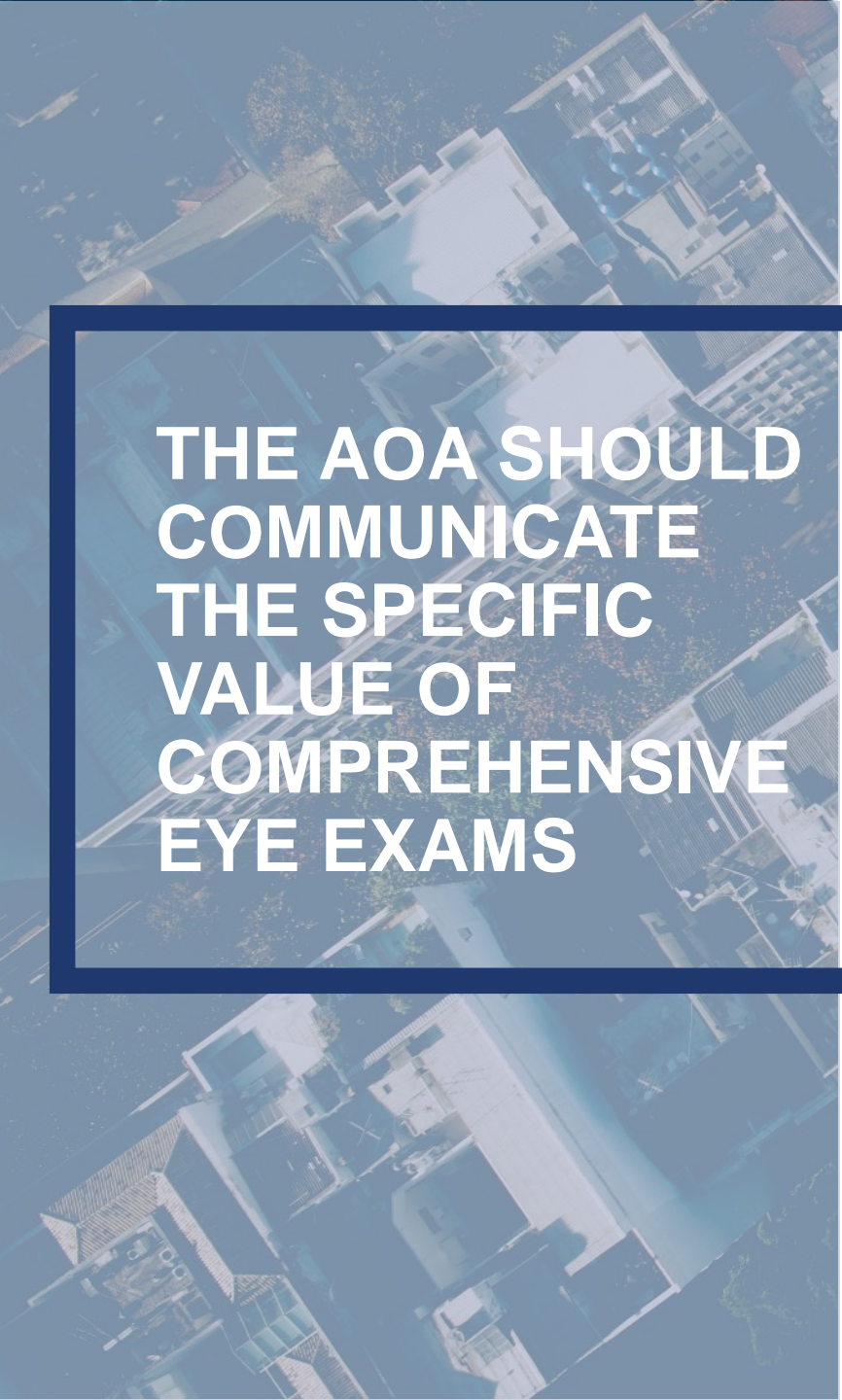


ONLINE VISION SCREENING APPS (SLIDES 136-143)



GAMING/SPORTS (SLIDES 144-149)





THE AOA SHOULD COMMUNICATE THE SPECIFIC VALUE OF COMPREHENSIVE EYE EXAMS

Most Americans understand that getting comprehensive eye exams is important.

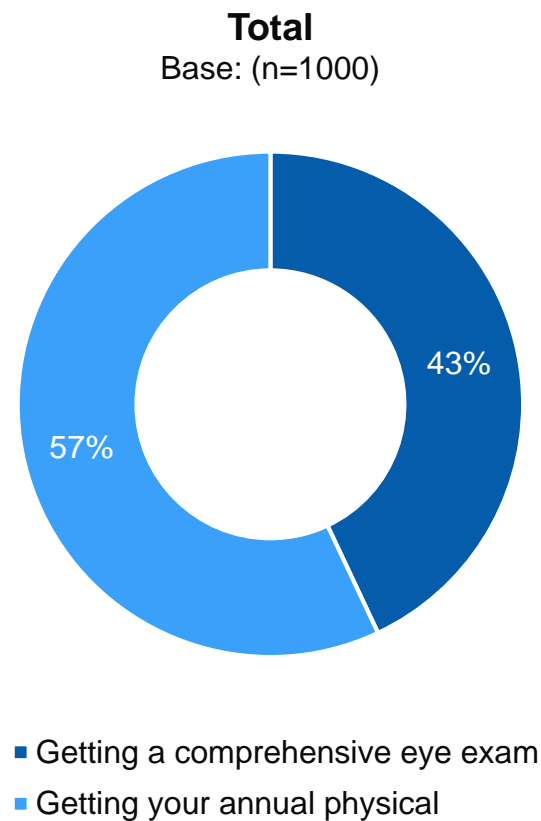
- Even though a third (32%) of eye glasses or contact lens users think getting an accurate prescription is more important than a comprehensive eye exam, three in five (59%) Americans know they should get a comprehensive eye exam annually.
- Americans also would prioritize taking their child to get a comprehensive eye exam over getting their own eye exam or doing other weekday activities, like grocery shopping or preparing for a meeting.

And even more Americans would be more inclined to get a comprehensive exam if they knew how doctors of optometry could detect certain diseases.

- 70% would be more likely to get a comprehensive eye exam if they knew specifically how a doctor of optometry can detect certain diseases when examining their eyes.
- Knowing that a comprehensive eye exam is the only non-invasive way to visualize the blood vessels make 78% of Americans more likely to get a comprehensive eye exam.

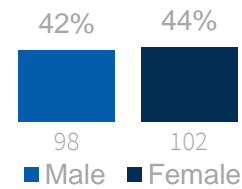
WHILE MORE AMERICANS WOULD PRIORITIZE GETTING AN ANNUAL PHYSICAL OVER A COMPREHENSIVE EYE EXAM...

“If you only had time for one of the following, which would you prioritize?”

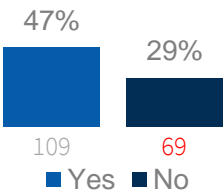


% Comprehensive eye exam

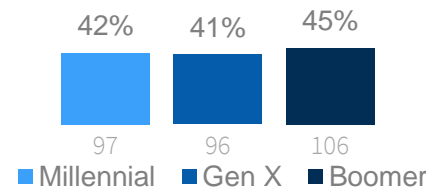
Gender
Base: (M=491) (F=509)



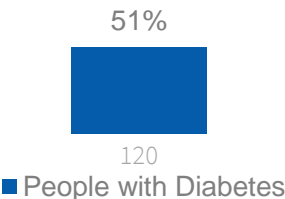
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

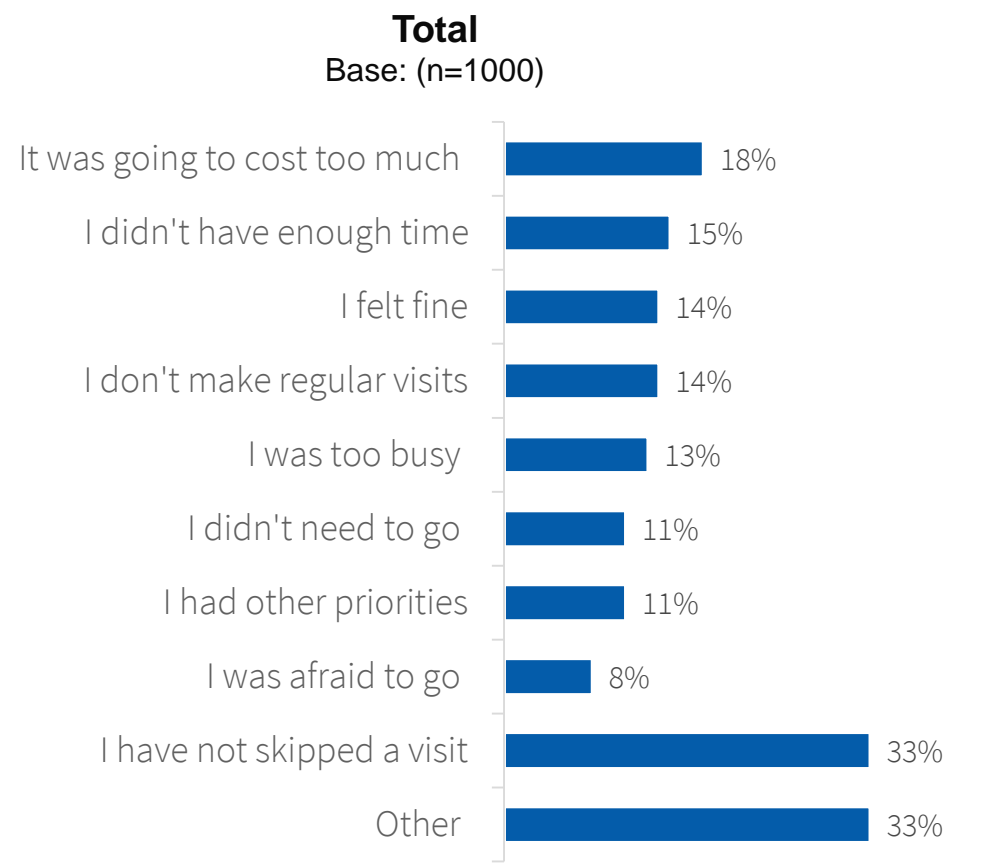


People with Diabetes
Base: (D=129)

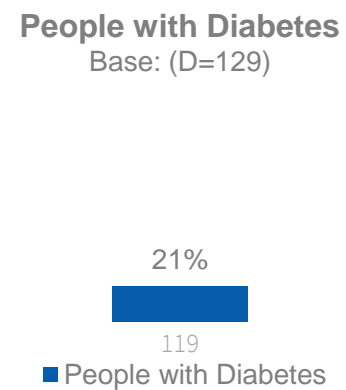
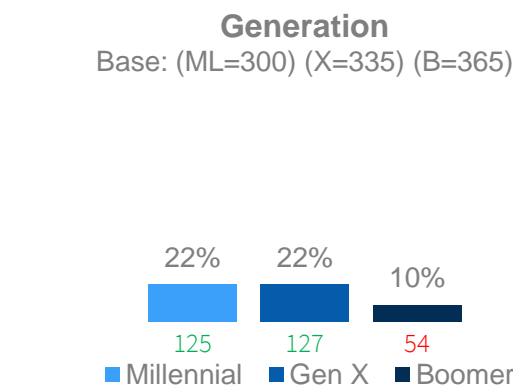
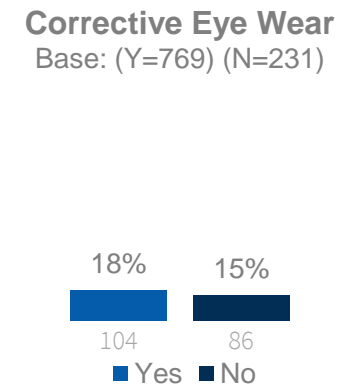
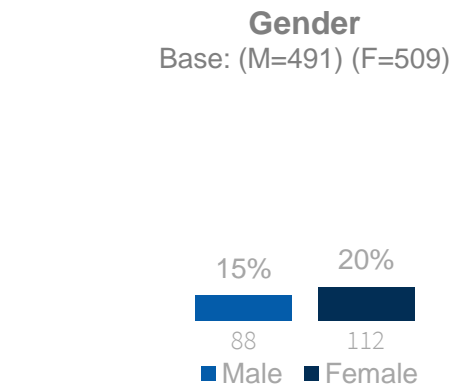


NEARLY ONE IN FIVE AMERICANS HAVE SKIPPED AN ANNUAL PHYSICAL DUE TO THE COST.

Which of the following are reasons you've skipped a regular visit for an annual physical? Please select all that apply.



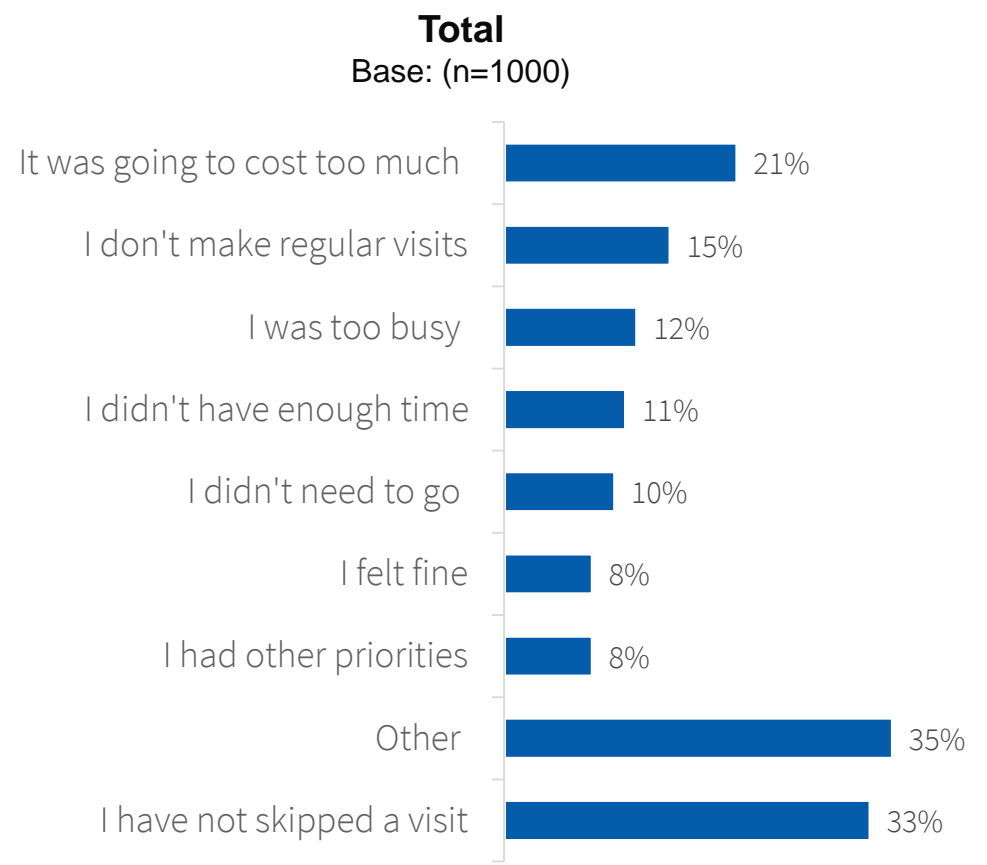
% It was going to cost too much



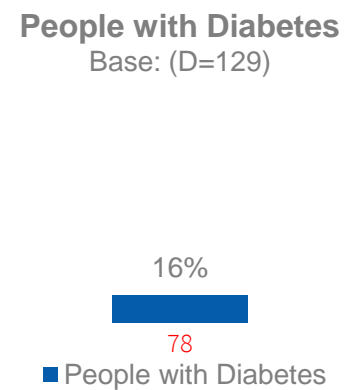
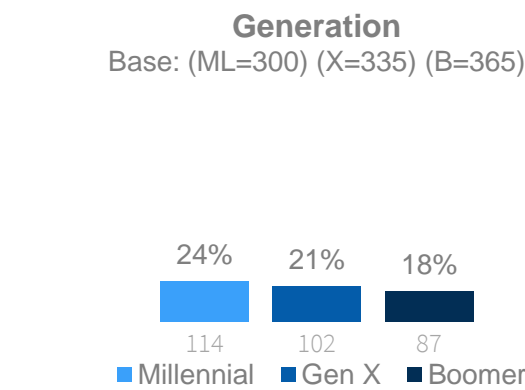
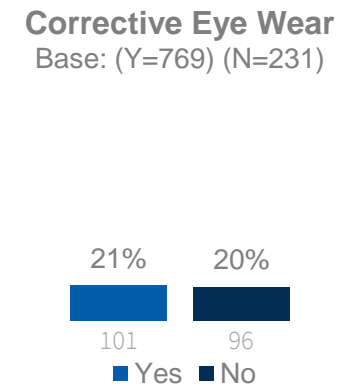
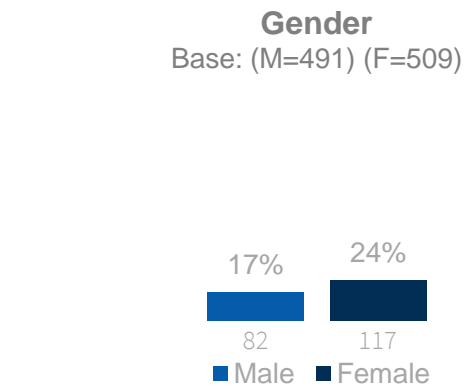
Q25. Which of the following are reasons you've skipped a regular visit for the following? Please select all that apply. Annual physical.

SIMILARLY, ONE IN FIVE AMERICANS HAVE SKIPPED A COMPREHENSIVE EYE EXAM DUE TO THE COST.

Which of the following are reasons you've skipped a regular visit for an annual comprehensive eye exam?



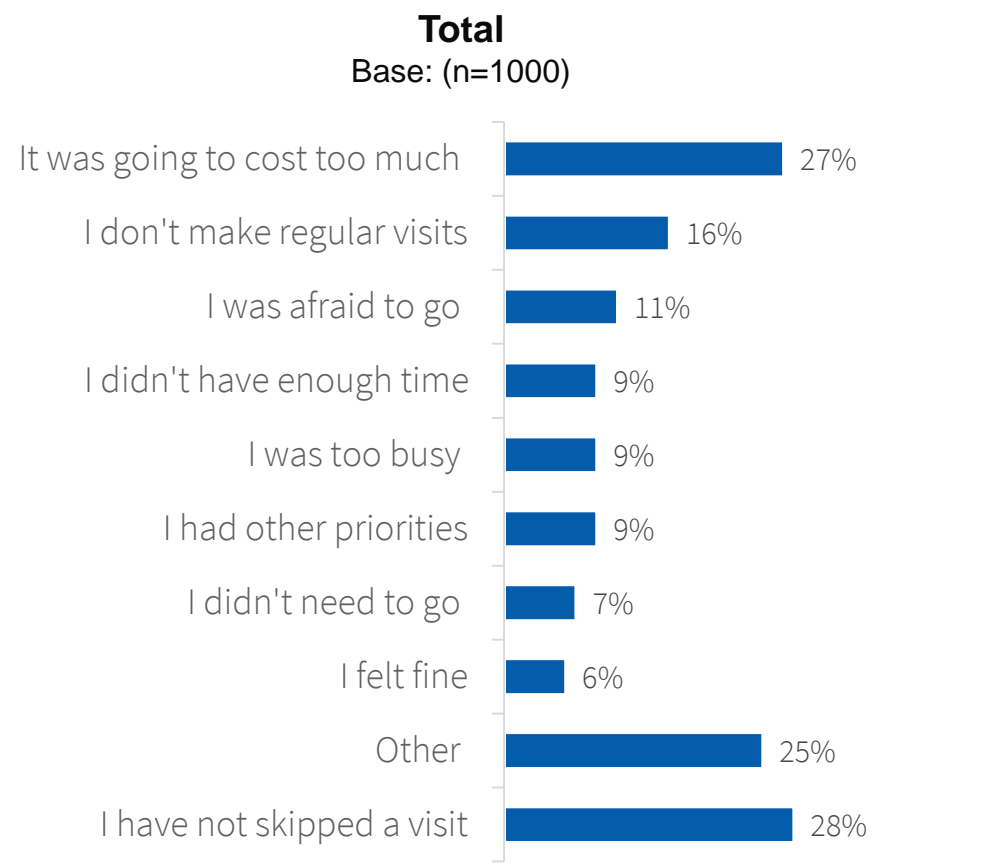
% It was going to cost too much



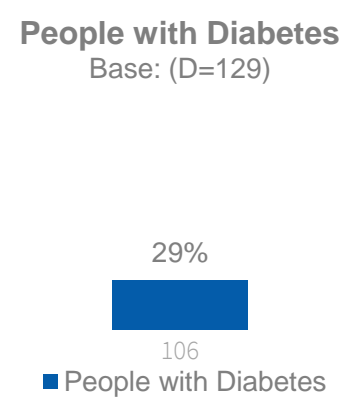
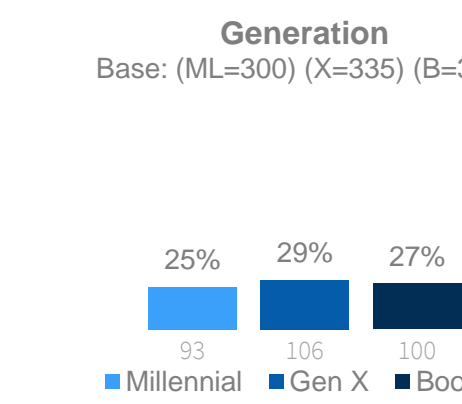
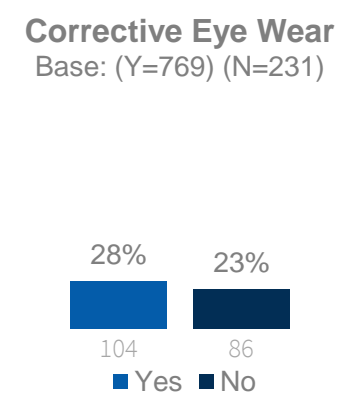
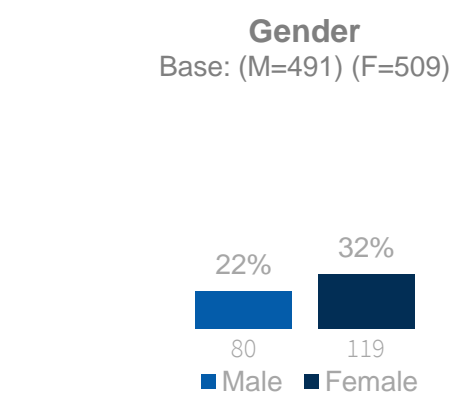
Q25. Which of the following are reasons you've skipped a regular visit for the following? Please select all that apply. Annual comprehensive eye exam.

SLIGHTLY MORE THAN A QUARTER OF AMERICANS HAVE SKIPPED A DENTAL CHECK-UP DUE TO COST.

Which of the following are reasons you've skipped a regular visit for a dental check-up?



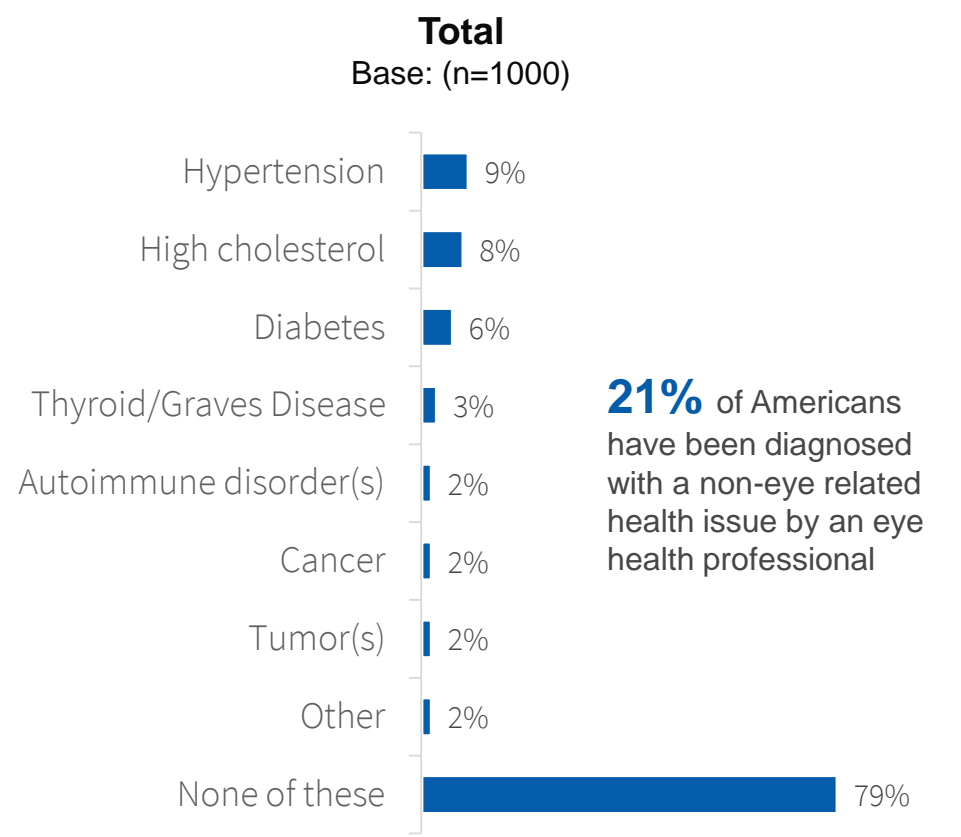
% It was going to cost too much



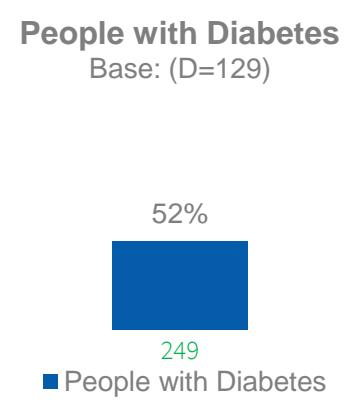
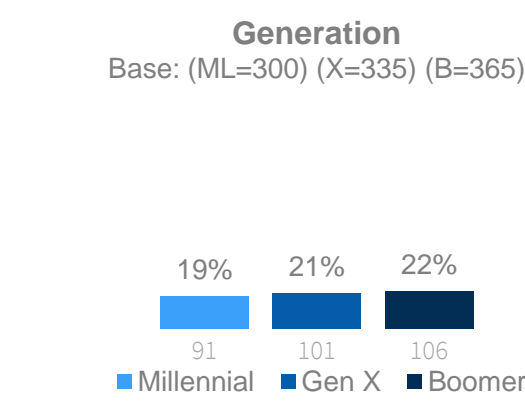
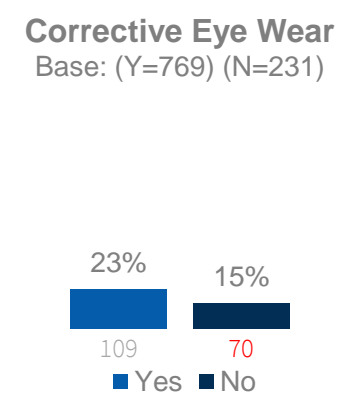
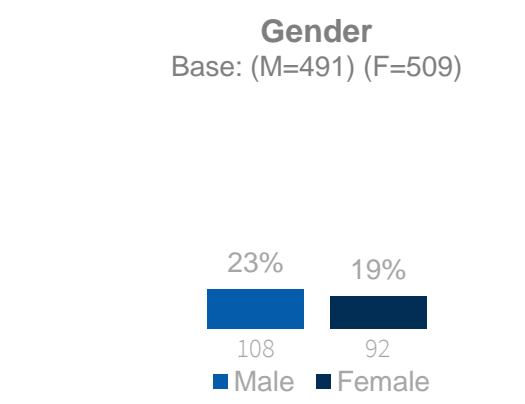
Q25. Which of the following are reasons you've skipped a regular visit for the following? Please select all that apply. Dental check-up.

ONE IN FIVE AMERICANS HAVE HAD AN EYE HEALTH PROFESSIONAL DETECT OR DIAGNOSE THEM WITH A NON-EYE RELATED HEALTH ISSUE.

Has an eye health professional ever detected/diagnosed you as having any of the following non-eye related health issues? Please select all that apply.



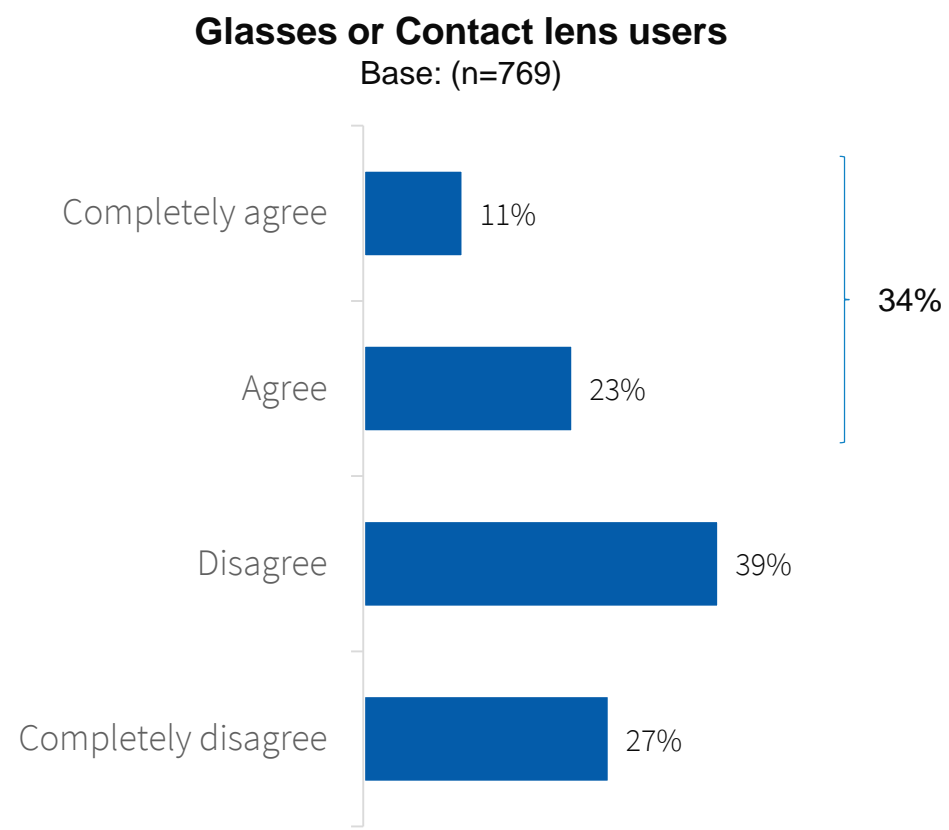
% Diagnosed with at least one non-eye related health issue



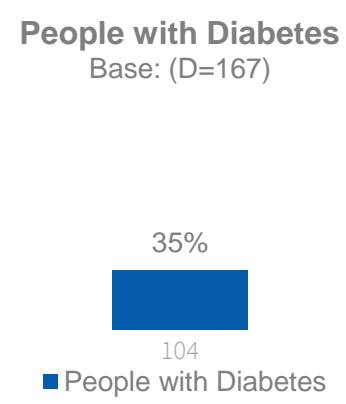
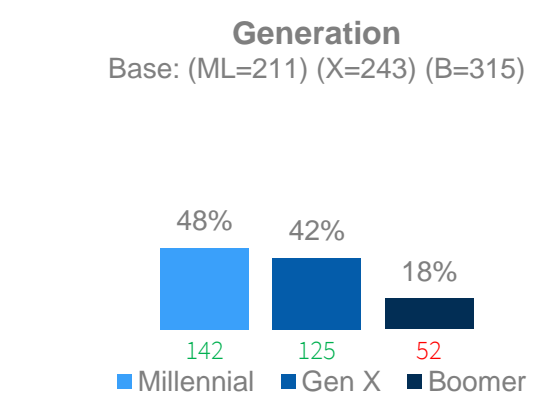
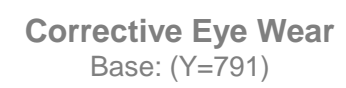
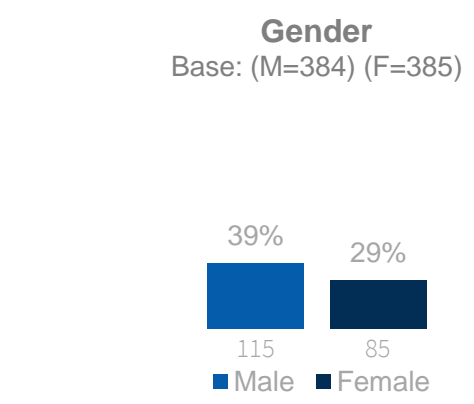
Q21. Has an eye health professional ever detected/diagnosed you as having any of the following non-eye related health issues? Please select all that apply.

ONE-THIRD OF CORRECTIVE EYEWEAR USERS WOULDN'T GO TO AN OPTOMETRIST IF THEY COULD GET PRESCRIPTIONS FILLED ELSEWHERE.

“If I could get my contact or glasses lens prescription filled elsewhere, I wouldn’t go see an optometrist in person.” To what extent do you personally agree or disagree with this statement?



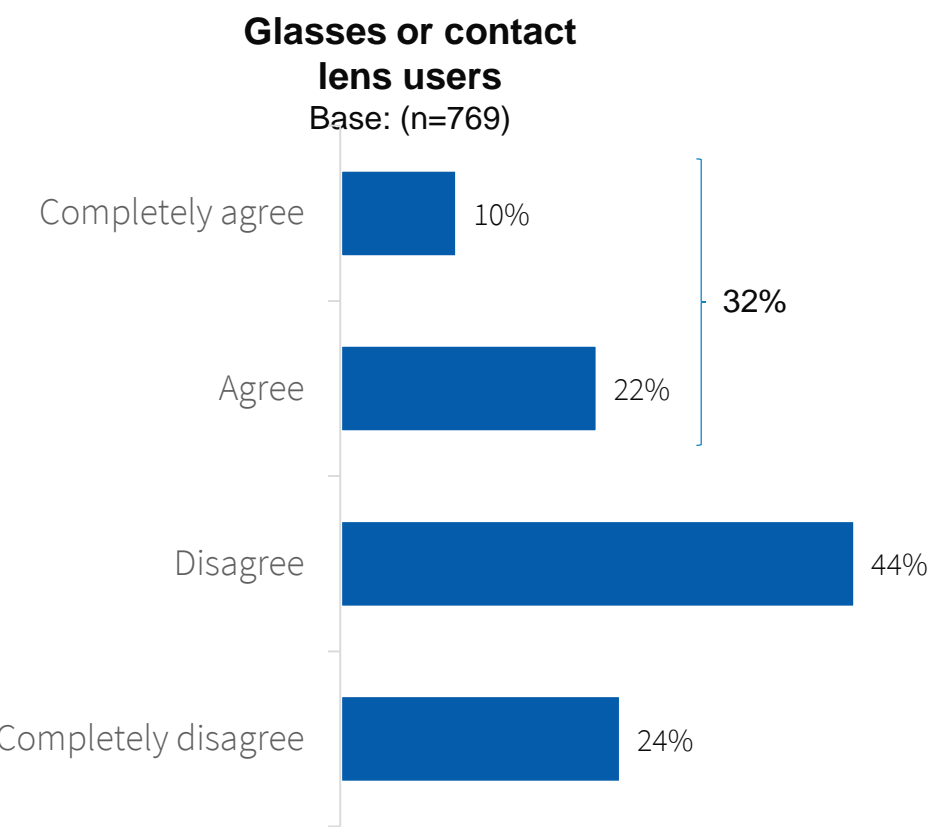
% Completely agree or agree



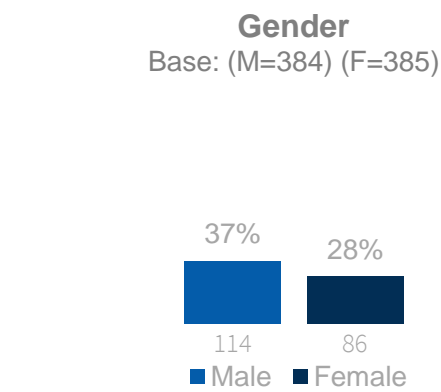
Q23. Now we are going to show you a series of statements. Please read each of the following and rate to what extent you, personally, agree or disagree with each. A. If I could get my contact or glasses lens prescription filled elsewhere, I wouldn’t go see an optometrist in person.

WHILE GETTING AN ACCURATE PRESCRIPTION IS MORE IMPORTANT TO A THIRD OF AMERICANS THAN GETTING A COMPREHENSIVE EYE EXAM...

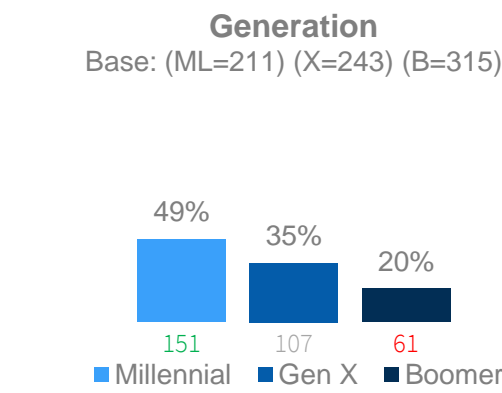
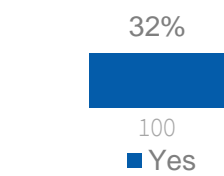
“Comprehensive eye exams aren’t nearly as important to me as getting an accurate prescription.” To what extent do you personally agree or disagree with this statement?



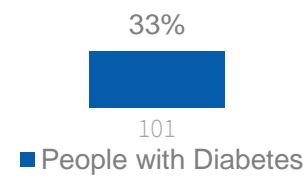
% Completely agree or agree



Corrective Eye Wear
Base: (Y=769)



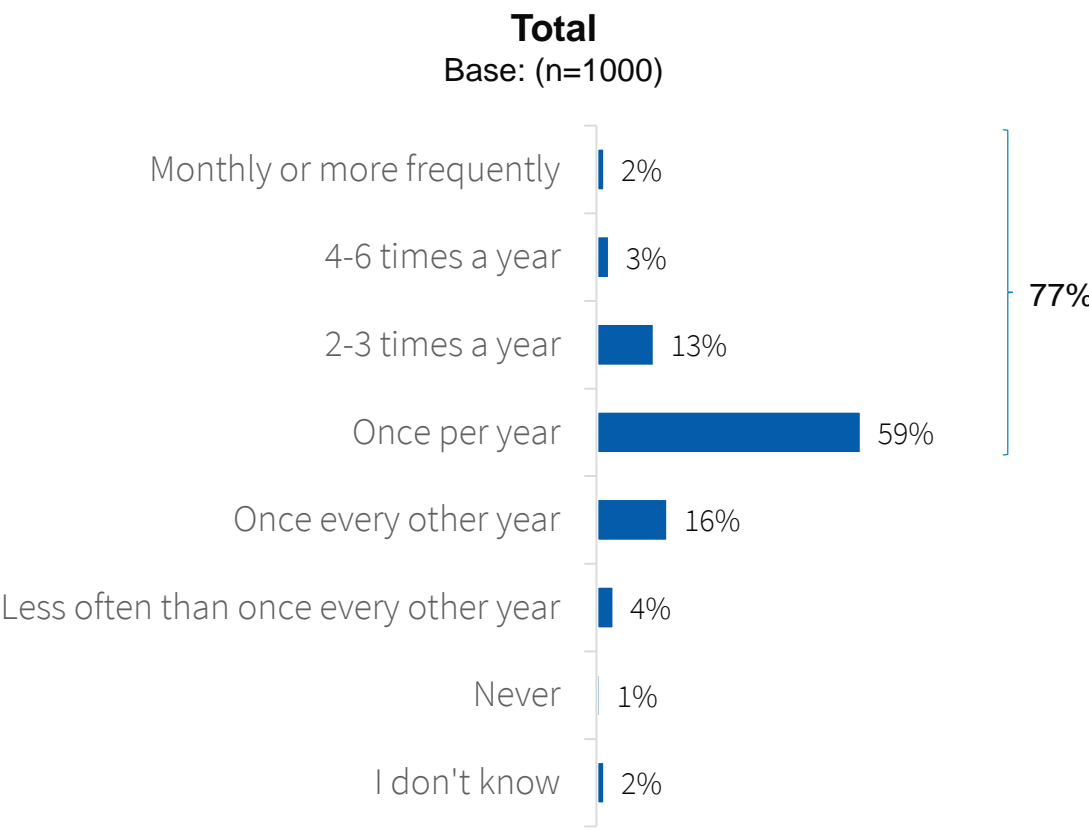
People with Diabetes
Base: (D=167)



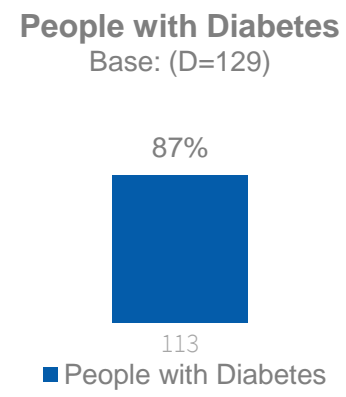
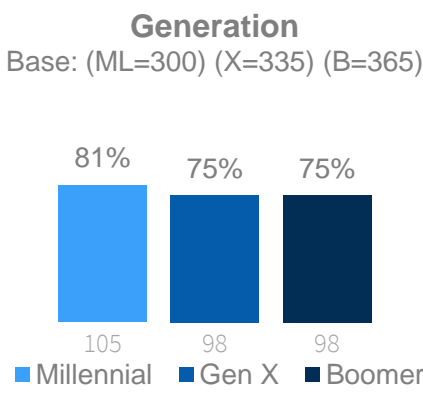
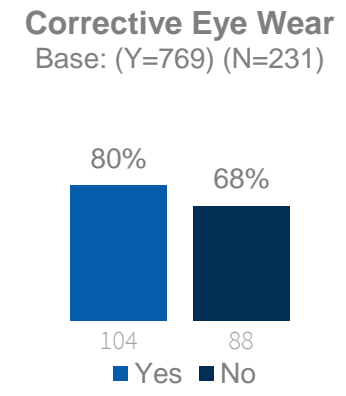
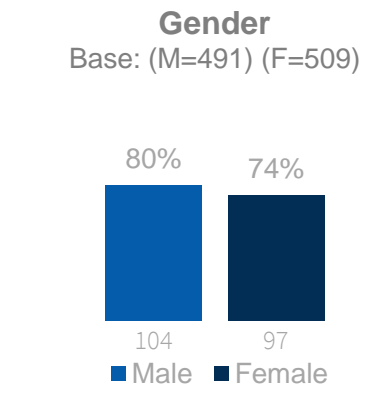
Q23. Now we are going to show you a series of statements. Please read each of the following and rate to what extent you, personally, agree or disagree with each. B. Comprehensive eye exams aren’t nearly as important to me as getting an accurate prescription.

OVER THREE-FOURTHS OF AMERICANS THINK THEY SHOULD GET A COMPREHENSIVE EYE EXAM AT LEAST ONCE PER YEAR.

How often do you think you should go to an eye health professional for a comprehensive eye exam?

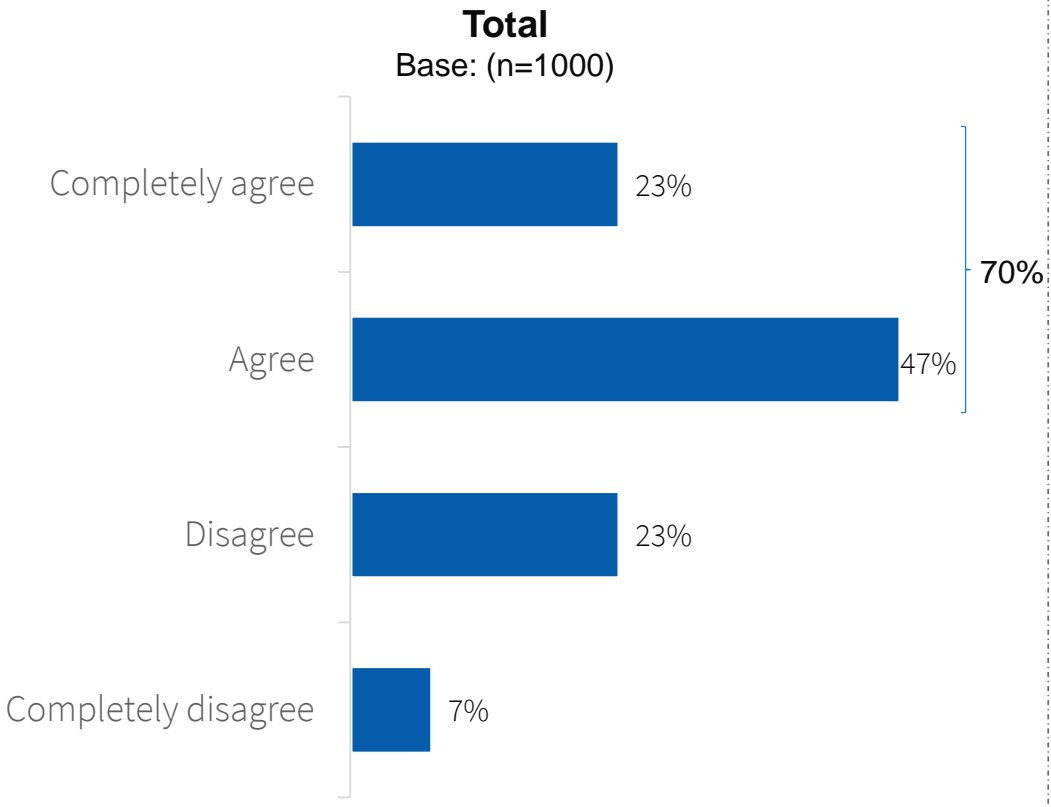


% At least once per year

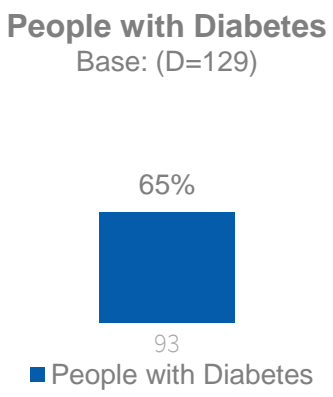
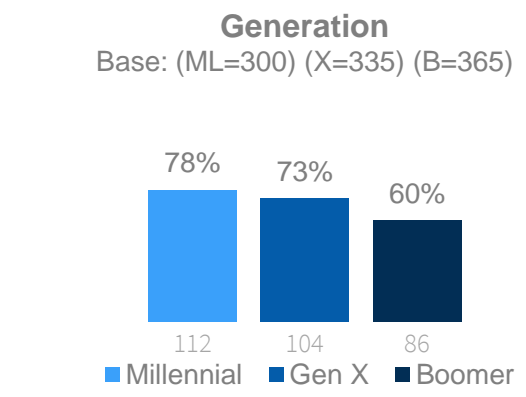
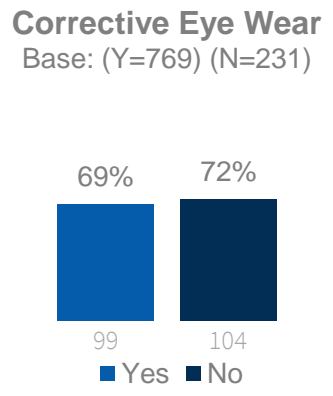
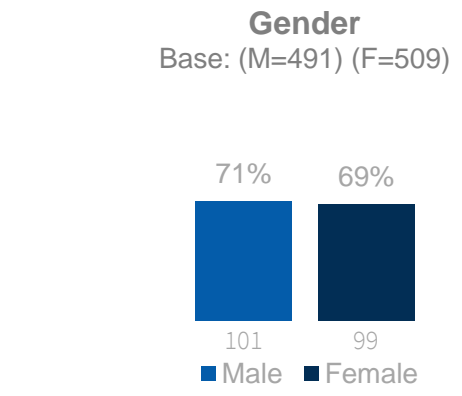


AMERICANS WOULD BE MORE INCLINED TO GET A COMPREHENSIVE EYE EXAM IF THEY KNEW HOW DISEASES COULD BE DETECTED.

“I would be more likely to get a comprehensive eye exam if I knew specifically how a doctor or optometry can detect certain diseases when examining your eyes.” To what extent do you personally agree or disagree with this statement?



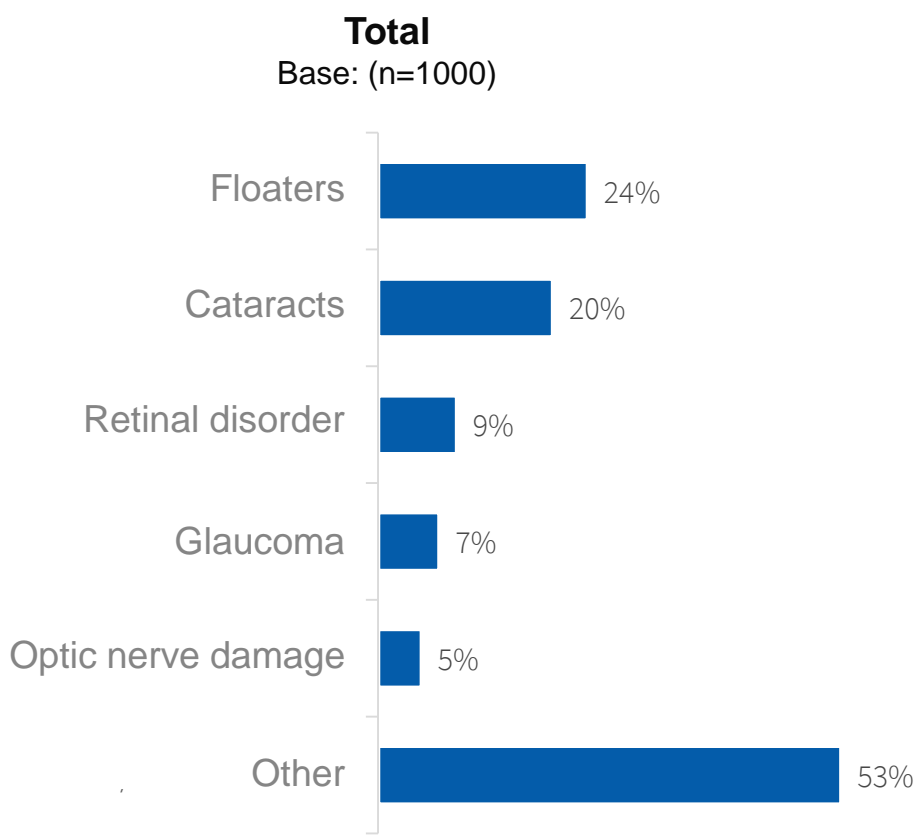
% Completely agree or agree



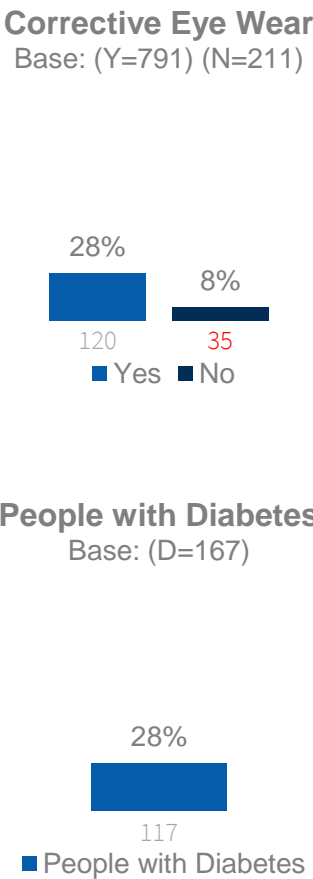
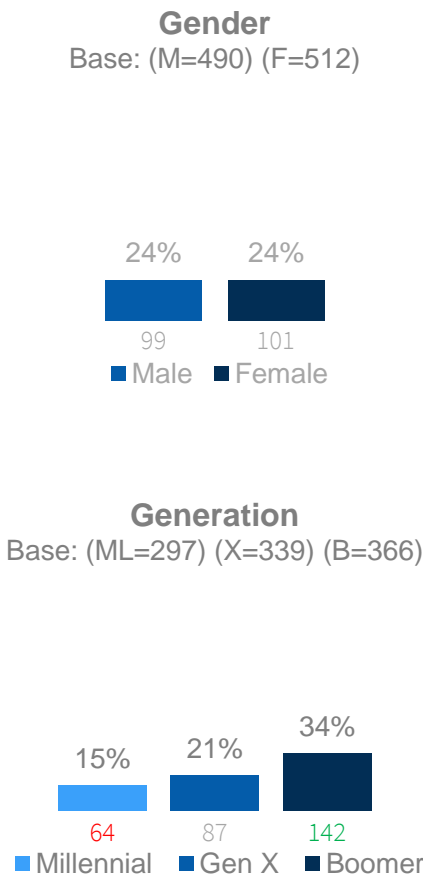
Q23. Now we are going to show you a series of statements. Please read each of the following and rate to what extent you, personally, agree or disagree with each. C. I would be more likely to get a comprehensive eye exam if I knew specifically how a doctor of optometry can detect certain diseases when examining your eyes.

A QUARTER OF AMERICANS HAVE HAD AN EYE HEALTH PROFESSIONAL DETECT FLOATERS IN THEIR EYES.

Has an eye health professional ever detected/diagnosed you as having any of the following eye health issues? Please select all that apply.



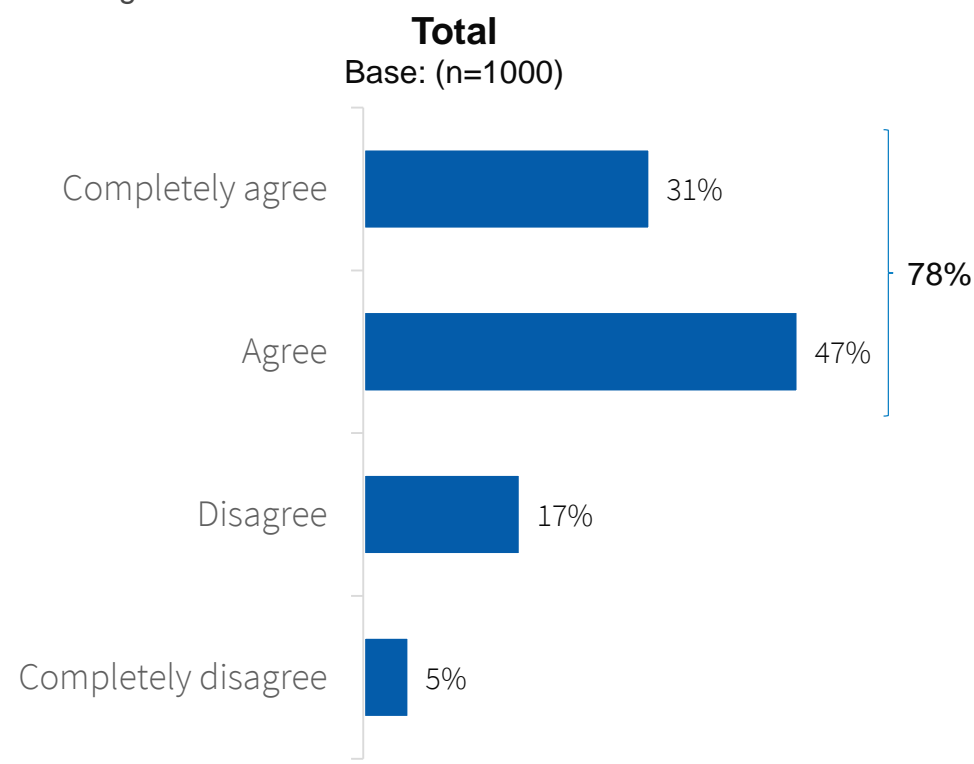
% Floaters



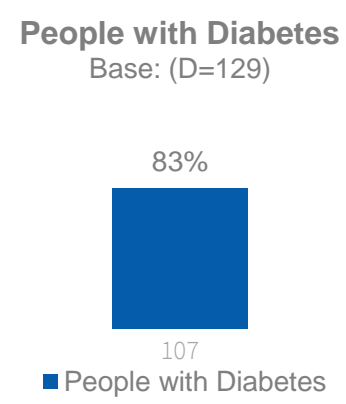
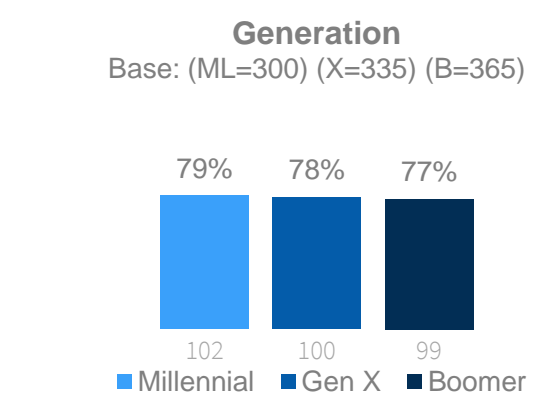
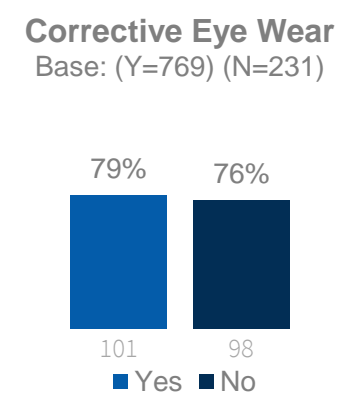
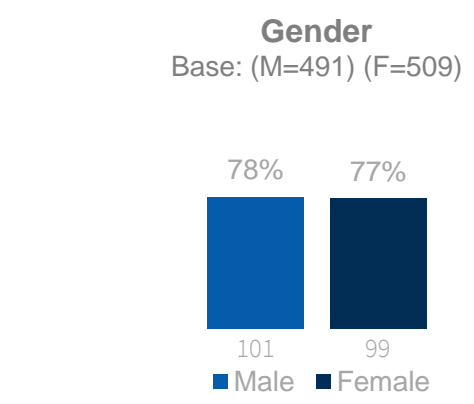
Q22. Has an eye health professional ever detected/diagnosed you as having any of the following eye health issues? Please select all that apply.

AMERICANS WOULD GET A COMPREHENSIVE EYE EXAM IF THEY KNEW IT WAS NEEDED TO VISUALIZE BLOOD VESSELS BEHIND THE EYE.

“I would be more likely to get a comprehensive eye exam if I knew that the only way to visualize the blood vessels behind the eye for issues without an x-ray, CT scan, or invasive surgery is through a comprehensive eye exam.” To what extent do you personally agree or disagree with this statement?



% Completely agree or agree



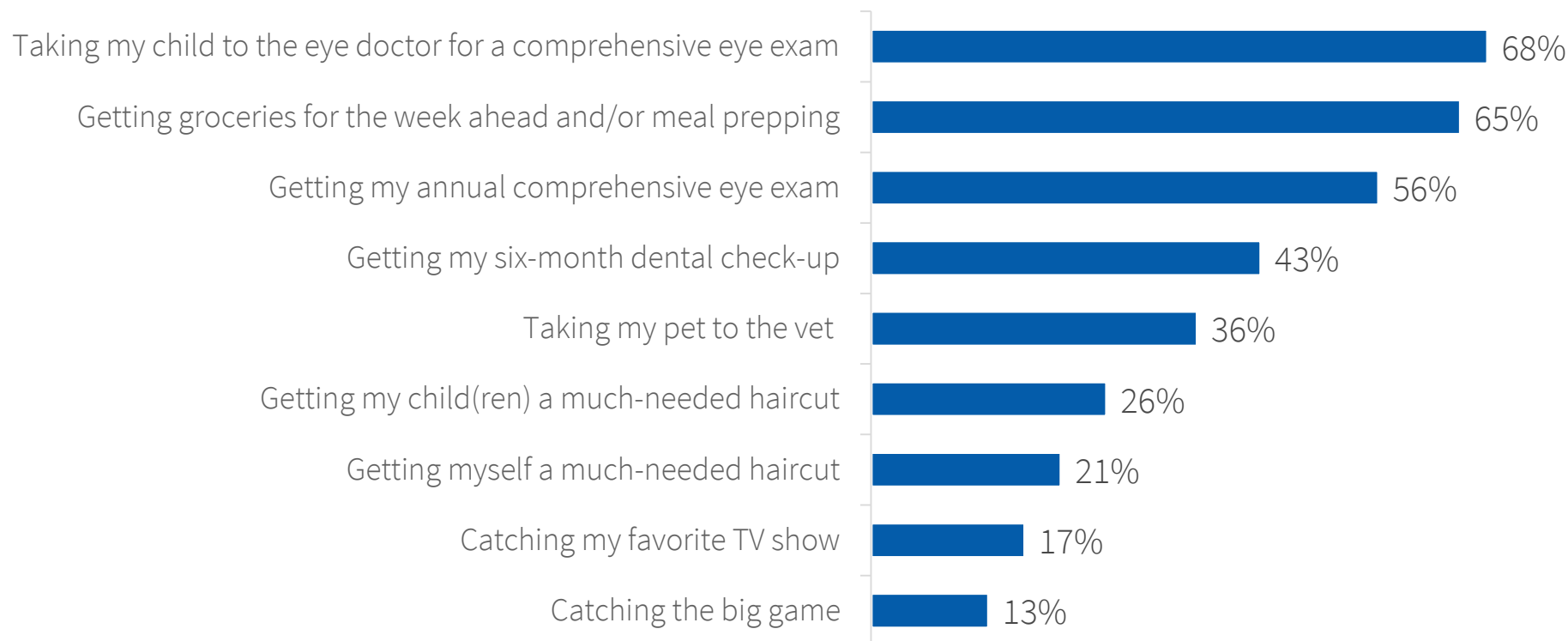
Q23. Now we are going to show you a series of statements. Please read each of the following and rate to what extent you, personally, agree or disagree with each. D. I would be more likely to get a comprehensive eye exam if I knew that the only way to visualize the blood vessels behind the eye for issues without an x-ray, CT scan, or invasive surgery is through a comprehensive eye exam.

MORE AMERICANS RANK GETTING GROCERIES IN THEIR TOP 3 PRIORITIES ON A WEEKEND DAY THAN THEY DO THEIR OWN EYE HEALTH.

Assuming you couldn't do all of these, how would you prioritize each of the following on a weekend day? Please rank them based on how you would prioritize, where 1 would be your top priority.

Total – Shown: % Ranked in Top 3 Priorities on a Weekend Day

Base: (n=1000)





TRACKING QUESTIONS (SLIDES 7-42)



COMPREHENSIVE EYE EXAM (SLIDES 43-56)



PEDIATRICS (SLIDES 57-80)



DIABETES (SLIDES 81-100)



CONTACT LENSES AND GLASSES (SLIDES 101-135)

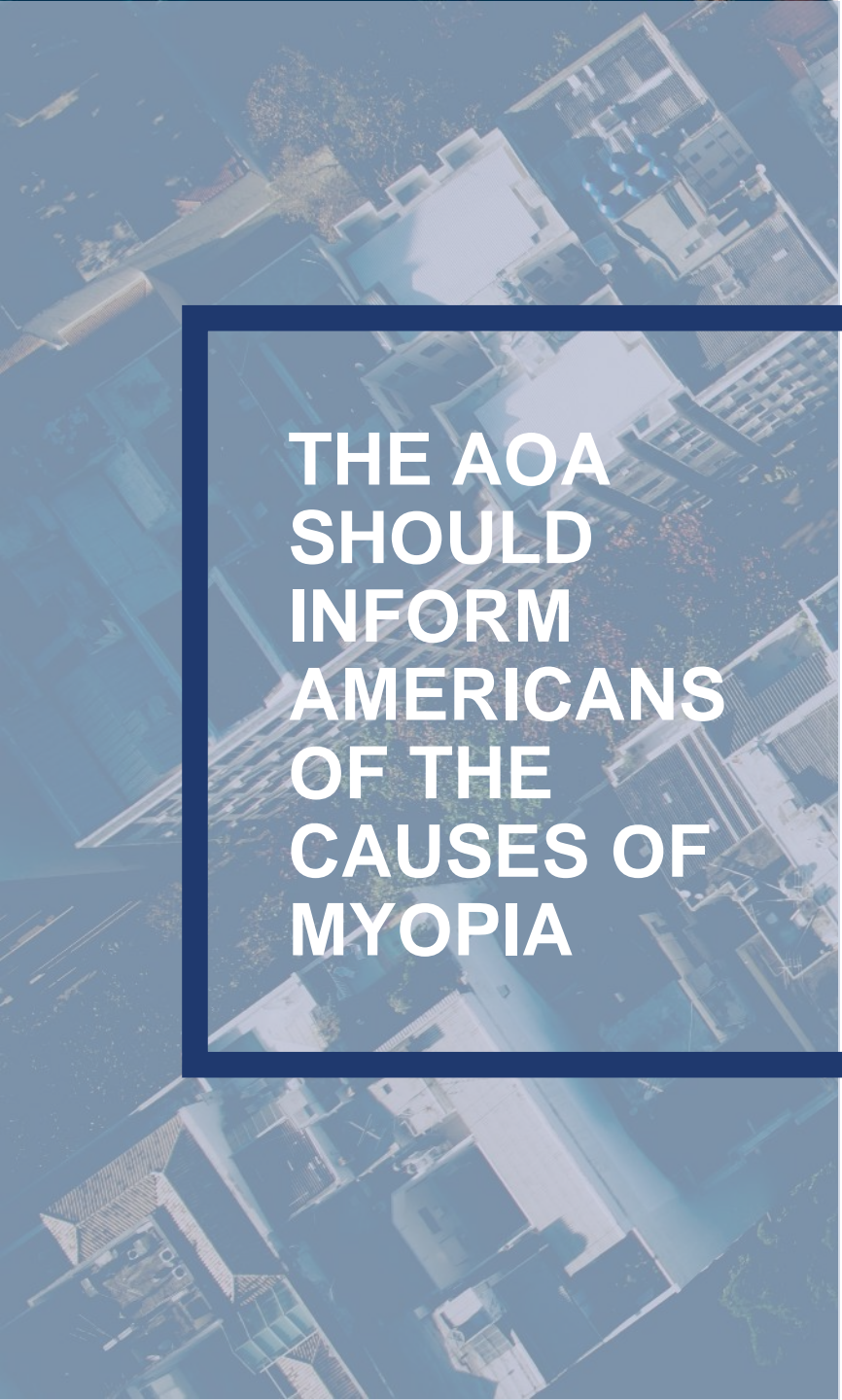


ONLINE VISION SCREENING APPS (SLIDES 136-143)



GAMING/SPORTS (SLIDES 144-149)





THE AOA SHOULD INFORM AMERICANS OF THE CAUSES OF MYOPIA

One in four parents report having a child who has been diagnosed with myopia/nearsightedness.

- The most commonly noticed symptoms are squinting (44%) and headaches (37%).
- For nearly two-thirds (64%) of parents, the first step was taking their child to see an eye doctor.
- Most children (85%) were diagnosed by an optometrist or ophthalmologist.

Taking your school-aged children to the optometrist is extremely important, as three-quarters (75%) of children with myopia were diagnosed between the ages of 3 and 12.

- The median age of diagnosis is between 7 and 9 years old.
- Seven in ten (70%) parents say they take their children to get a comprehensive eye exam at least once per year.

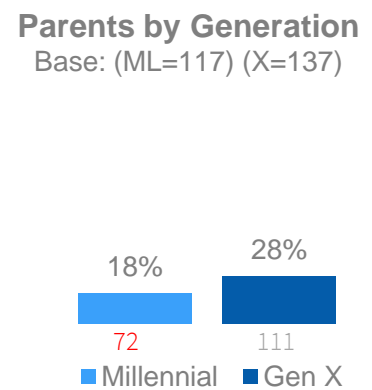
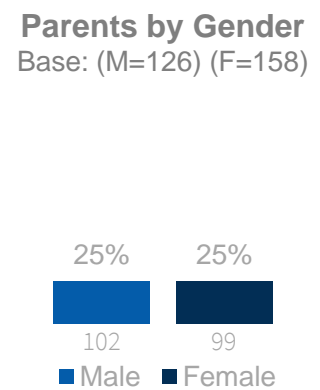
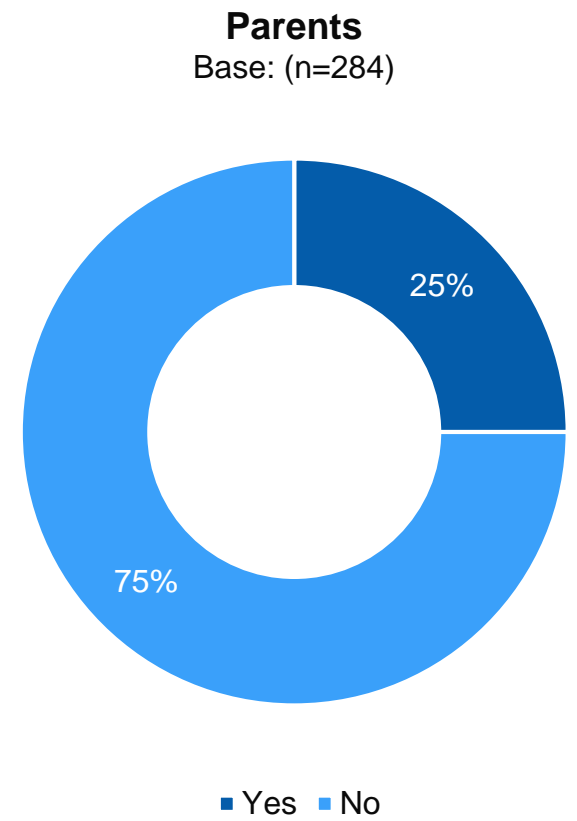
While nearly two thirds of Americans are familiar with myopia/nearsightedness, they are unsure or unaware of the details.

- Seven in ten (69%) are unaware that myopia first occurs in school-age children.
- Less than a third (30%) are aware that spending a lot of time reading can increase the risk of developing myopia.
- Half (52%) are unsure if glasses and contacts increase the risk of myopia worsening.
- Nearly one in three (30%) are unaware of any methods to help control myopia/nearsightedness.

ONE IN FOUR PARENTS HAS A CHILD WHO'S BEEN DIAGNOSED WITH MYOPIA/NEARSIGHTEDNESS.

Have any of the children under the age of 18 currently living in your household been diagnosed with myopia/nearsightedness?

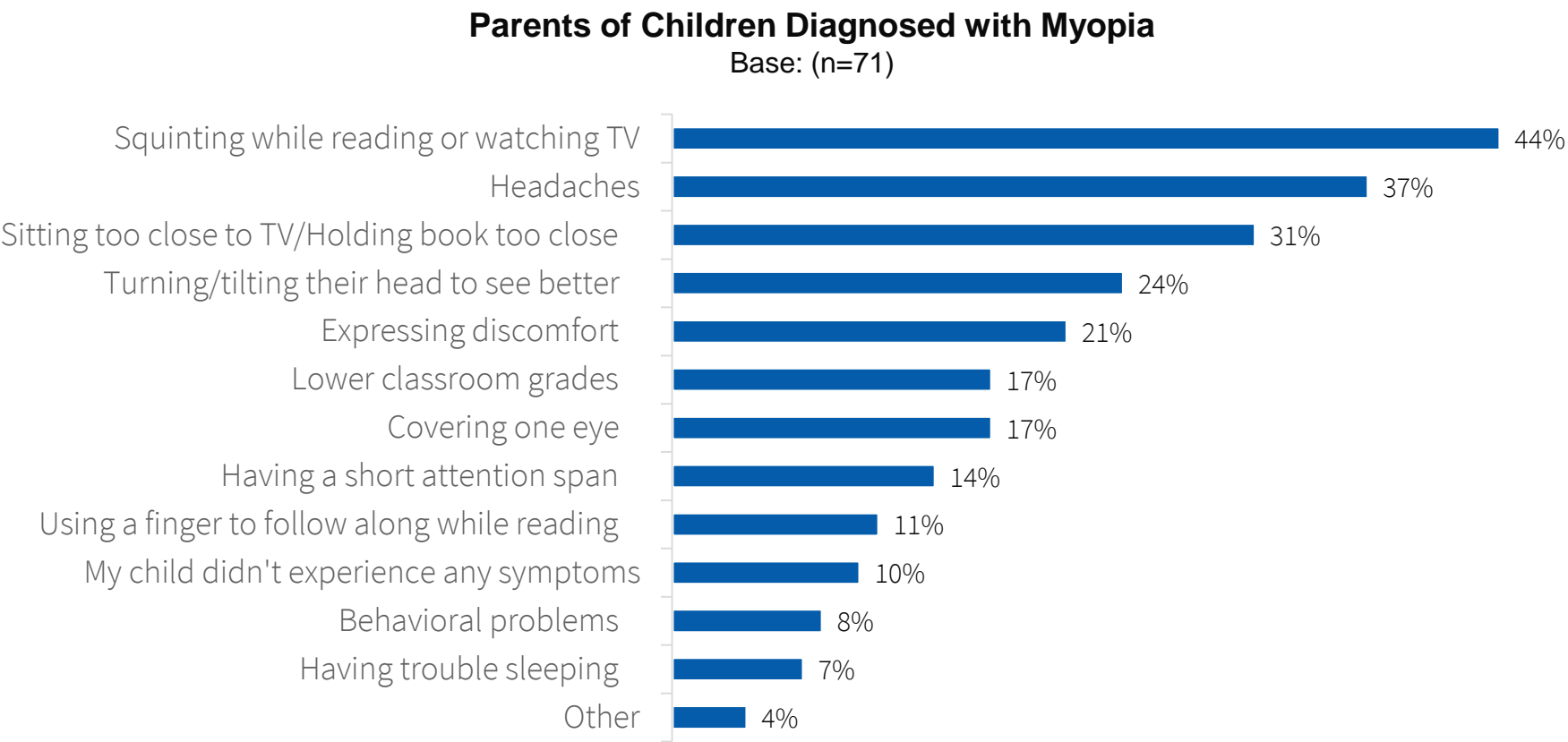
% Yes



Note: Base sizes are too low to show breakouts of Boomer parents, parents with/without corrective eyewear, and parents with diabetes.

THE MOST COMMON SIGN OF VISION PROBLEMS AMONG CHILDREN IS SQUINTING, FOLLOWED BY HEADACHES.

What made you think your child(ren) may have an issue with their vision?

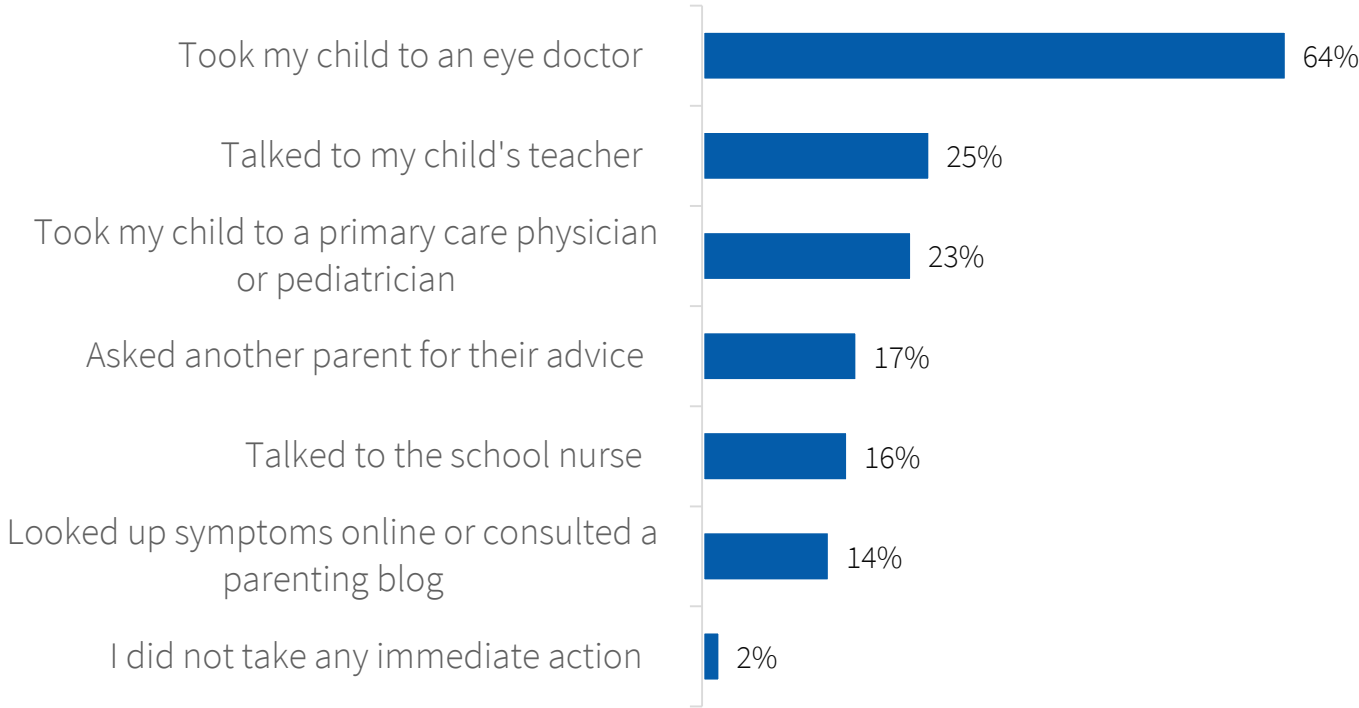


Note: Base sizes are too low to show demographic breakouts for parents of children with myopia

NEARLY TWO-THIRDS OF PARENTS OF KIDS WITH MYOPIA FIRST TOOK THEIR CHILD TO AN EYE DOCTOR AFTER NOTICING SYMPTOMS.

What was the first step you took to find out more information after noticing these symptoms?

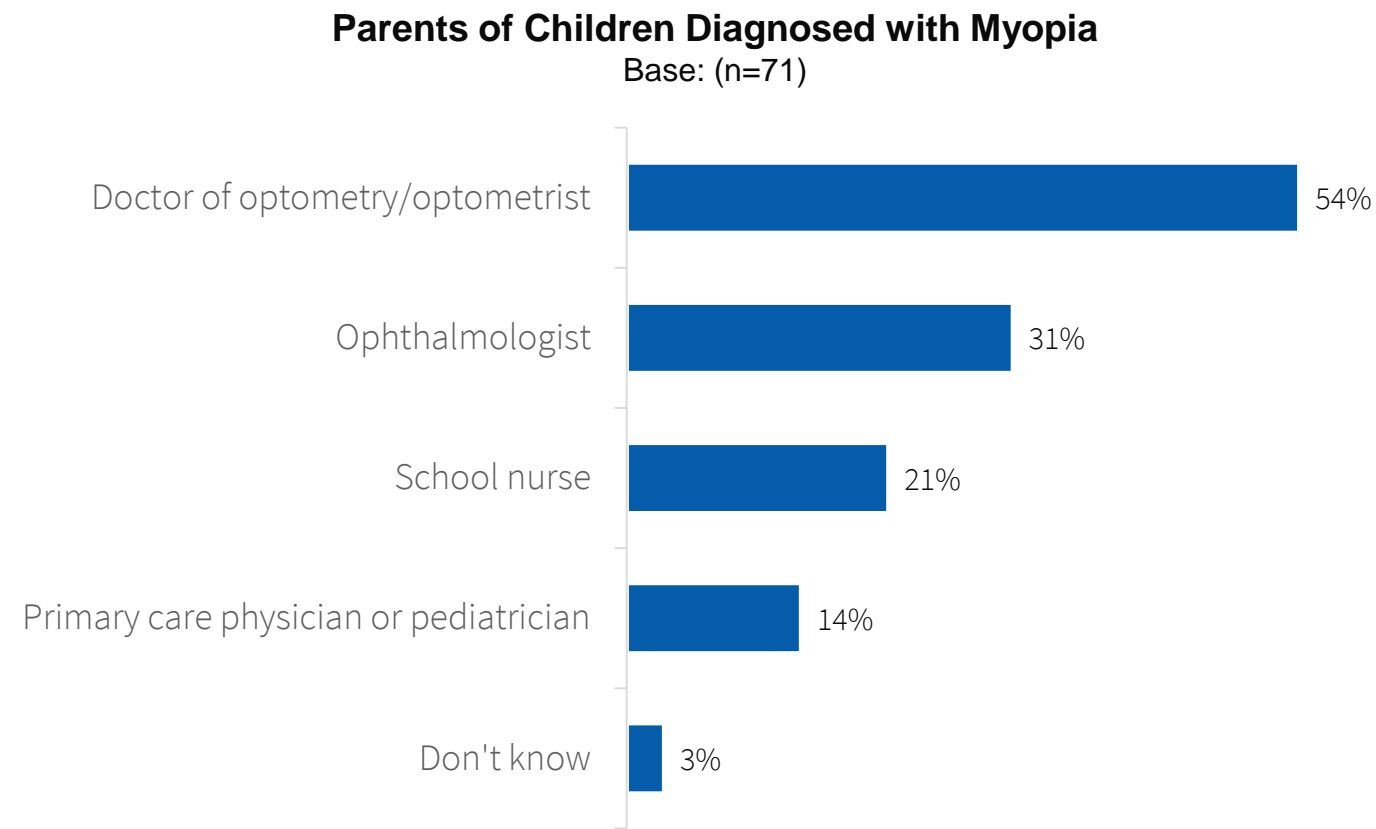
Parents of Children Diagnosed with Myopia After Parents Noticed Symptoms
Base: (n=64)



Note: Base sizes are too low to show demographic breakouts for parents of children with myopia

MORE THAN HALF OF PARENTS SAY THEIR CHILD(REN) WITH MYOPIA WERE DIAGNOSED BY AN OPTOMETRIST.

Which of the following best describe who they were diagnosed by?



Note: Base sizes are too low to show demographic breakouts for parents of children with myopia

Q62. Which of the following best describe who they were diagnosed by? If more than one of your children has been diagnosed with myopia/nearsightedness and they were diagnosed by different people, please select each that applies.

THREE QUARTERS OF CHILDREN WITH MYOPIA WERE DIAGNOSED BETWEEN THE AGES OF THREE AND TWELVE.

At approximately which age were your children diagnosed with myopia?

Age of Children Diagnosed with Myopia
As reported by parents
Base: (n=91)

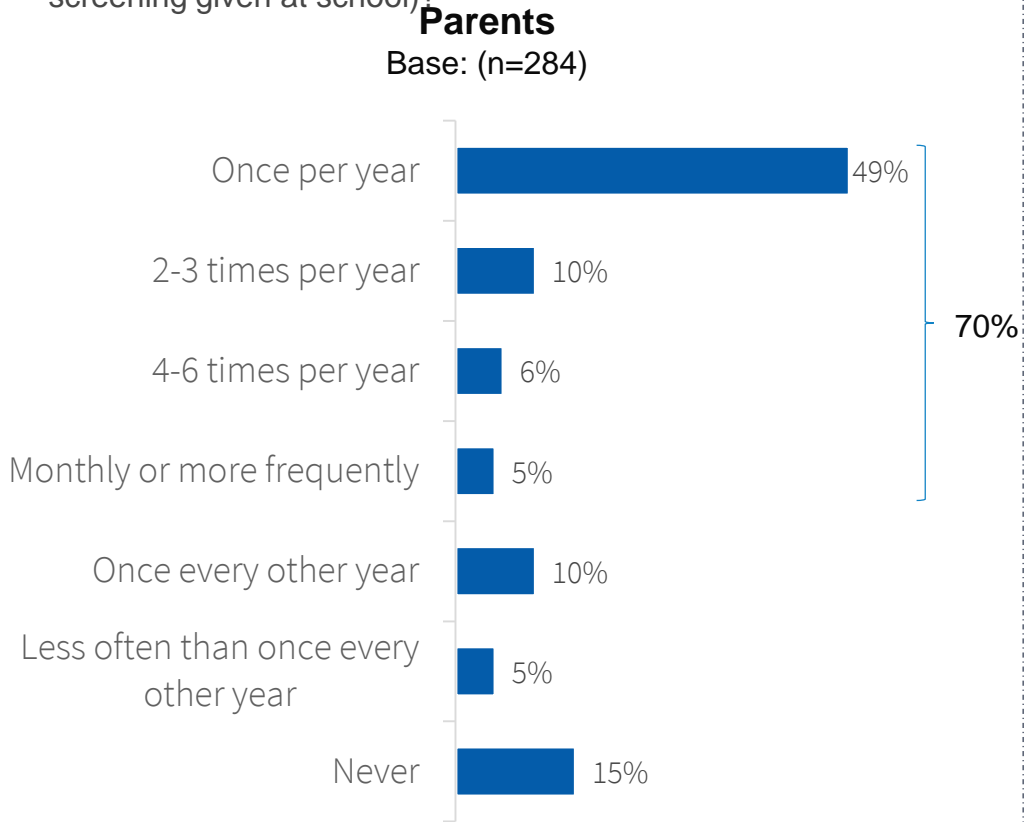
0 to 2 years	9%
3 to 6 years	24%
7 to 9 years	30%
10 to 12 years	21%
13 to 17 years	16%

Median age range

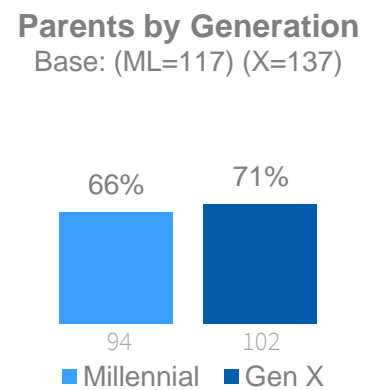
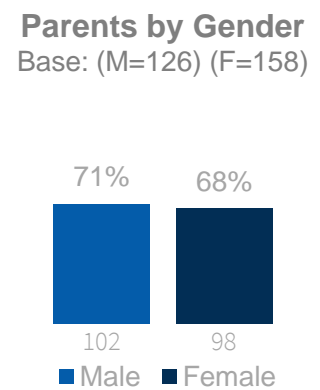
Q61. At approximately which age were they diagnosed? If more than one of your children has been diagnosed with myopia/nearsightedness, please mark the age of diagnosis for each.

SEVEN IN TEN PARENTS SAY THEY TAKE THEIR CHILDREN TO GET A COMPREHENSIVE EYE EXAM AT LEAST ONCE PER YEAR.

How often do you take your child(ren) to an eye doctor for a comprehensive eye exam (this does not include an annual screening given at school)?



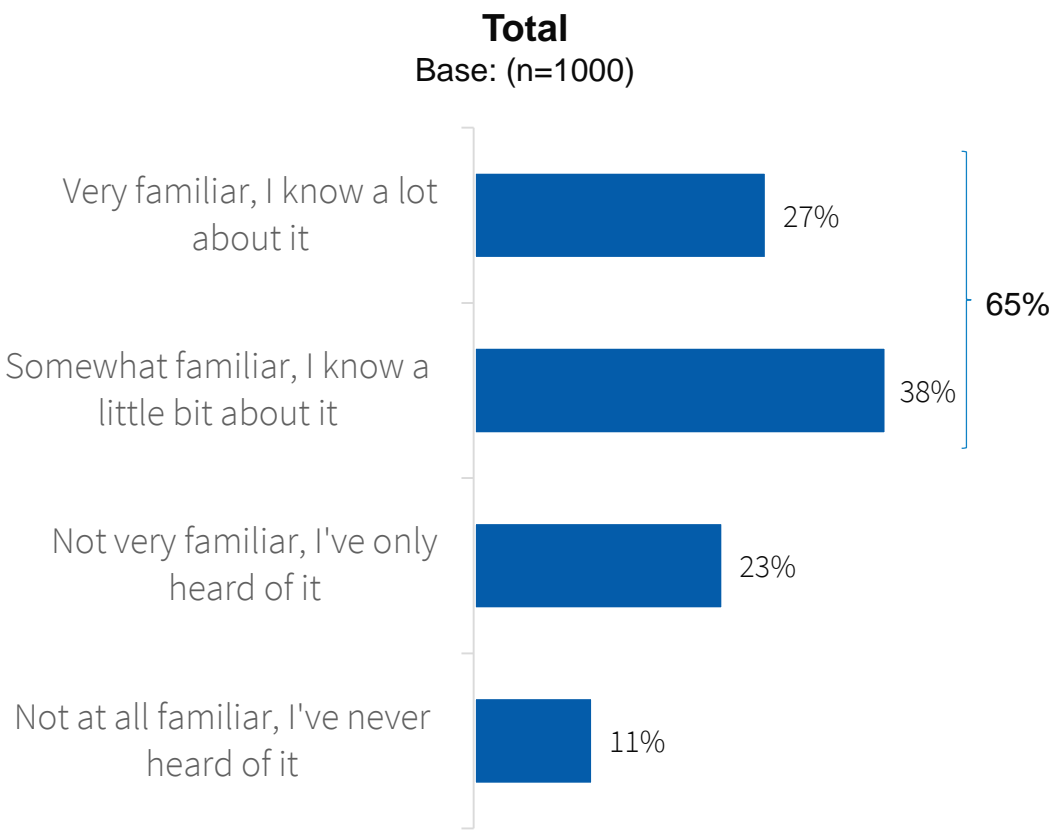
% At least once per year



Note: Base sizes are too low to show breakouts of Boomer parents, parents with/without corrective eyewear, and parents with diabetes.

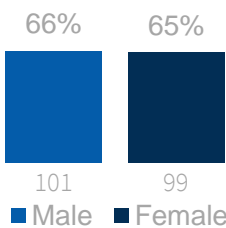
WHILE NEARLY TWO-THIRDS OF AMERICANS ARE FAMILIAR WITH MYOPIA/NEARSIGHTEDNESS...

How familiar are you with myopia/nearsightedness?

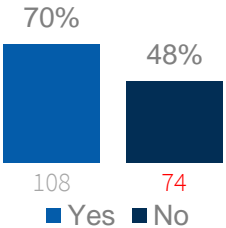


% Very familiar or somewhat familiar

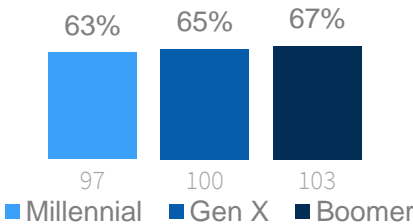
Gender
Base: (M=491) (F=509)



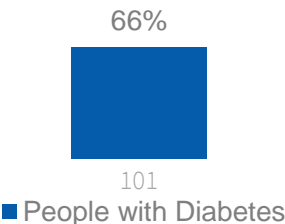
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

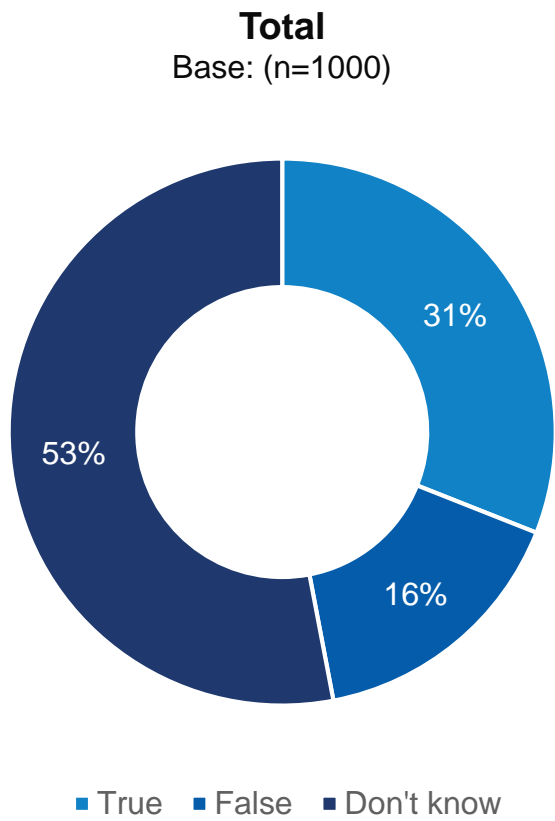


People with Diabetes
Base: (D=129)



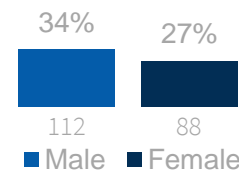
SEVEN IN TEN AMERICANS ARE UNAWARE THAT MYOPIA FIRST OCCURS IN SCHOOL-AGE CHILDREN...

“Myopia/Nearsightedness first occurs in school-age children.”
Please indicate if the statement is true or false.

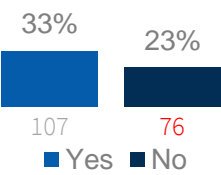


% True

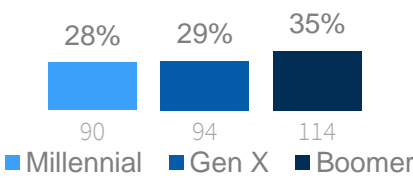
Gender
Base: (M=491) (F=509)



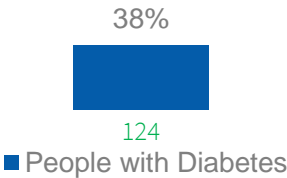
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



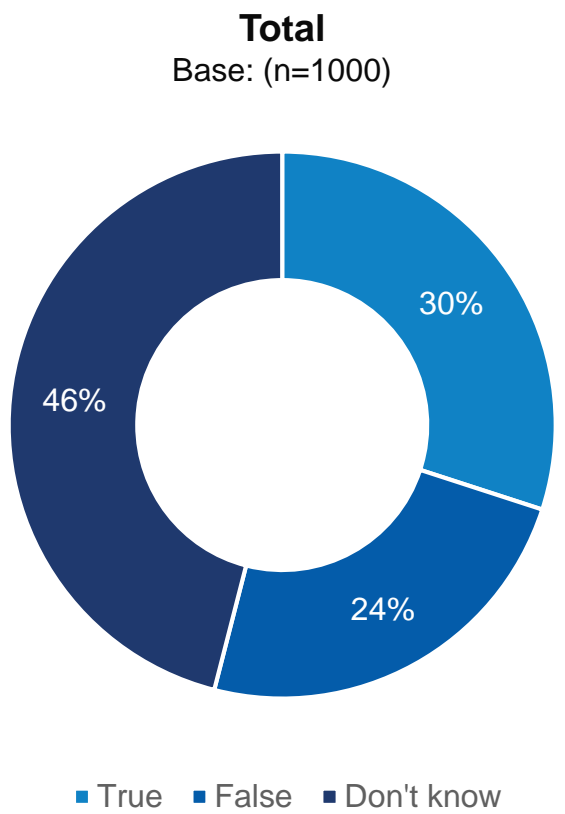
People with Diabetes
Base: (D=129)



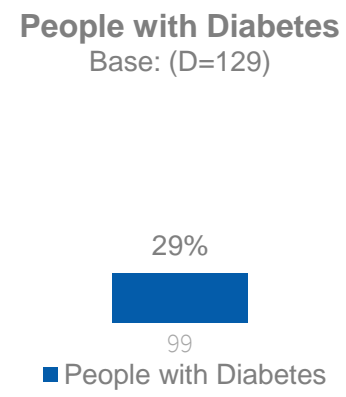
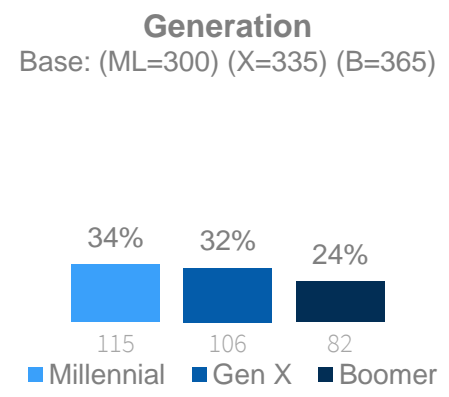
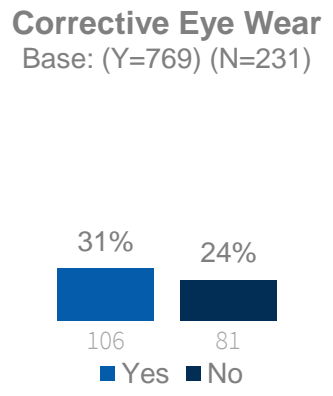
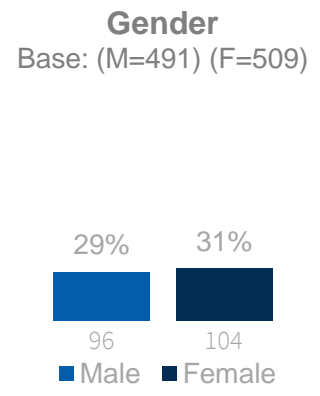
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." A. Myopia/Nearsightedness first occurs in school-age children

LESS THAN A THIRD OF AMERICANS ARE AWARE THAT SPENDING A LOT OF TIME READING CAN INCREASE THE RISK OF DEVELOPING MYOPIA.

“Spending a lot of time reading can increase the risk of developing myopia/nearsightedness.” Please indicate if the statement is true or false.



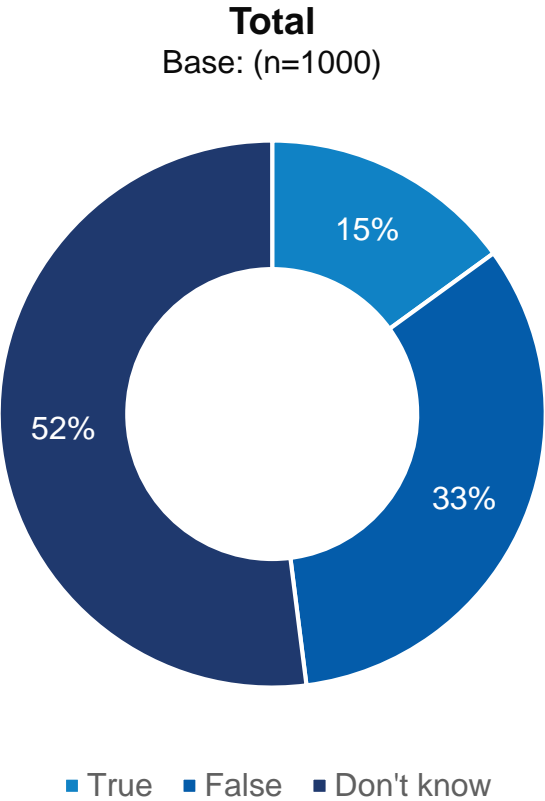
% True



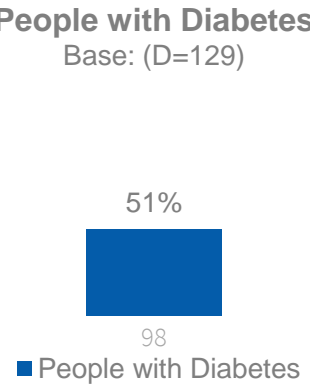
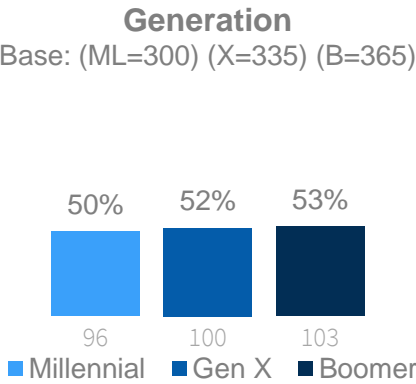
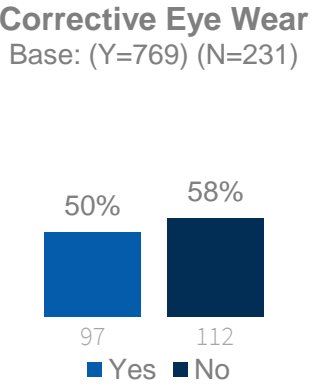
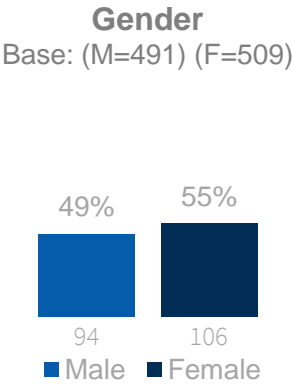
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." F. *Spending a lot of time reading can increase the risk of developing myopia/nearsightedness.*

HALF OF AMERICANS DON'T KNOW IF GLASSES AND CONTACTS INCREASE THE RISK OF MYOPIA WORSENING IN CHILDHOOD.

“Glasses and contact lenses may increase the risk of myopia/nearsightedness worsening throughout childhood.” Please indicate if the statement is true or false.



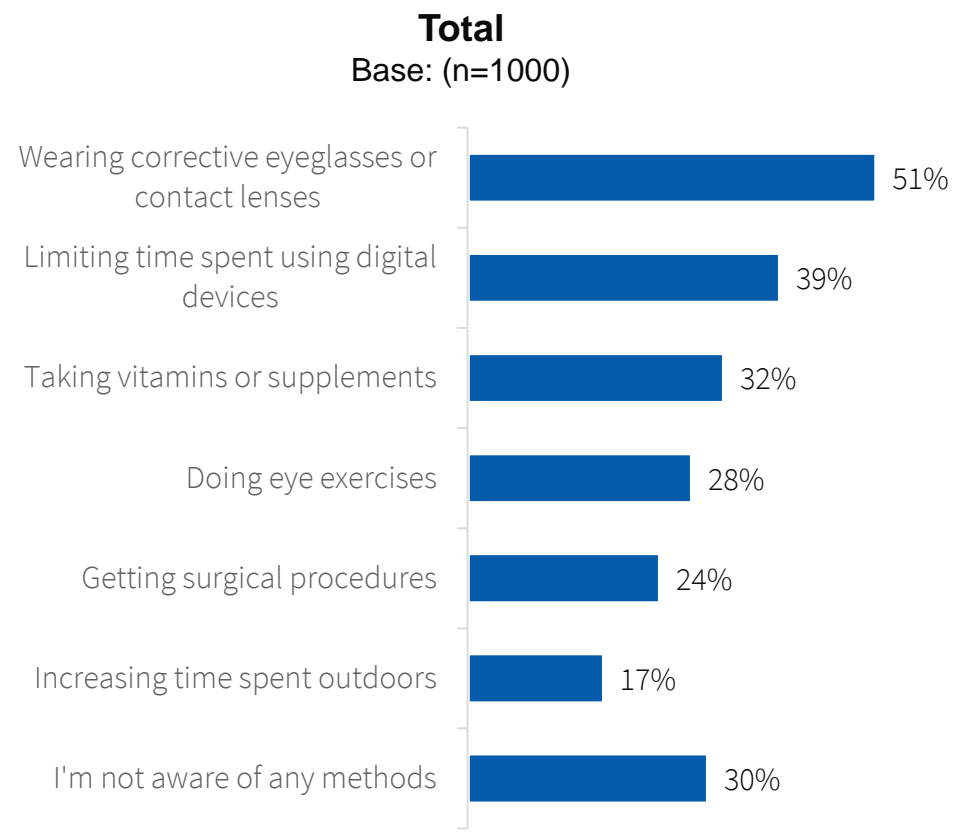
% Don't know



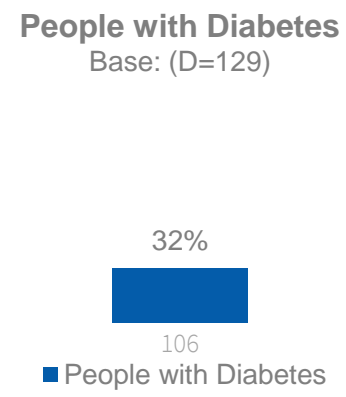
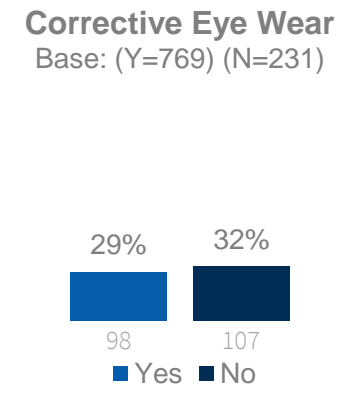
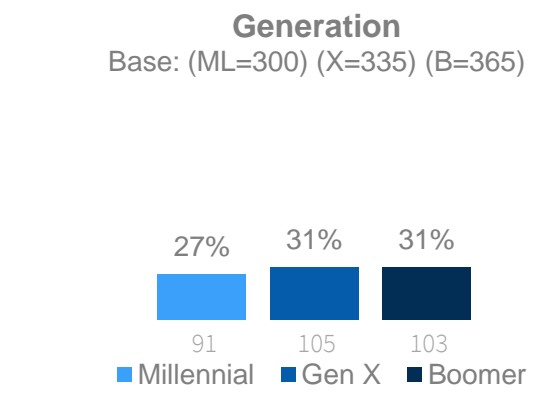
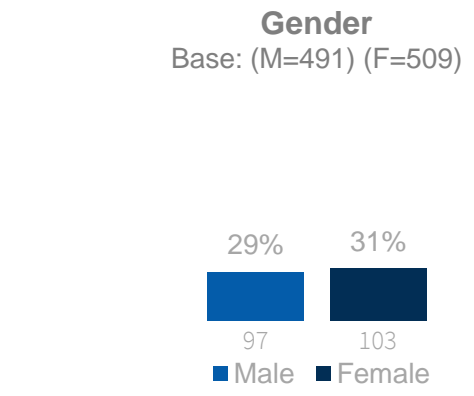
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." J. Glasses and contact lenses may increase the risk of myopia/nearsightedness worsening throughout childhood.

NEARLY ONE IN THREE AMERICANS ARE UNAWARE OF ANY METHODS TO HELP PREVENT MYOPIA FROM WORSENING.

Which of the following can help prevent myopia/nearsightedness from worsening?

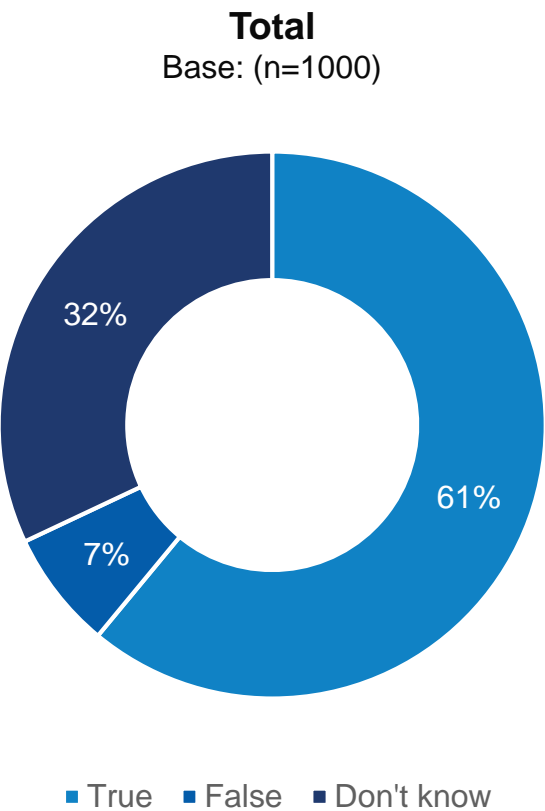


% Unaware of any methods



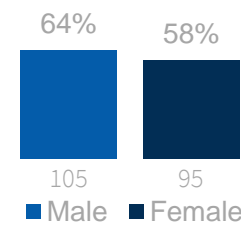
THREE IN FIVE AMERICANS KNOW THAT EARLY INTERVENTION IS KEY TO REDUCING VISION LOSS CAUSED BY MYOPIA.

“Early intervention is key to reducing the amount of vision loss caused by myopia/nearsightedness.” Please indicate if the statement is true or false.

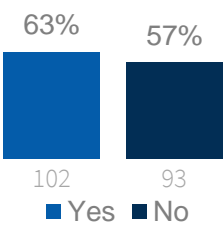


% True

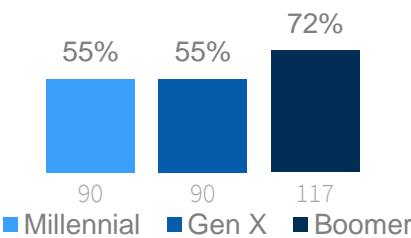
Gender
Base: (M=491) (F=509)



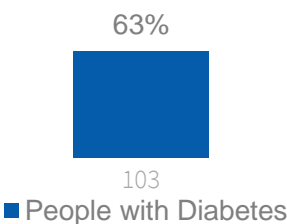
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



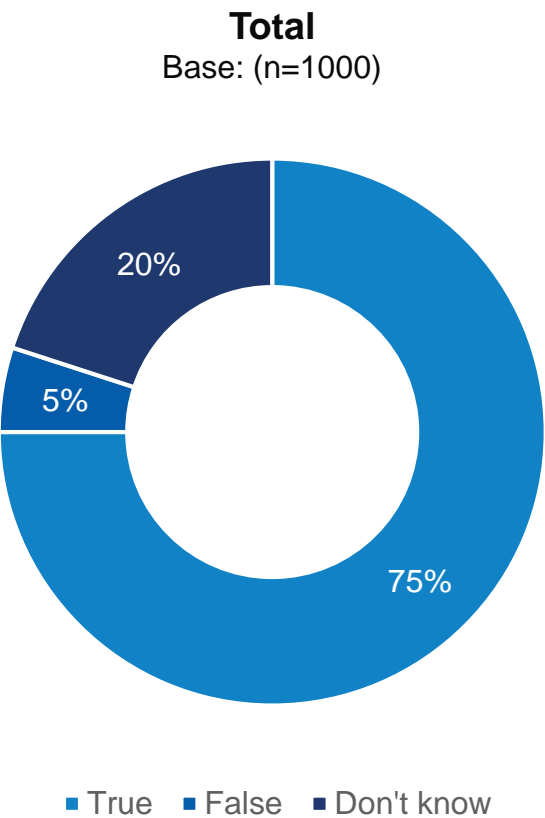
People with Diabetes
Base: (D=129)



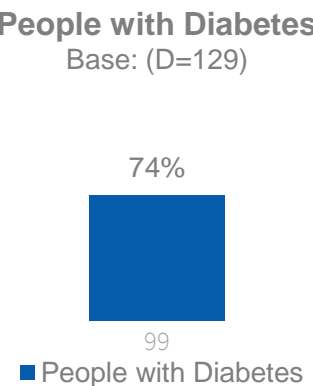
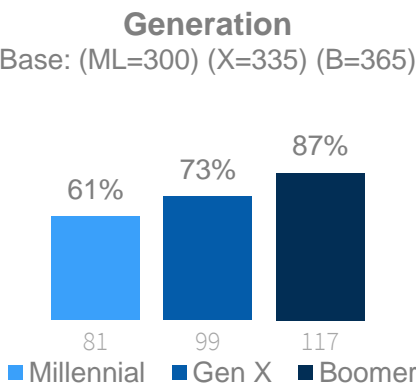
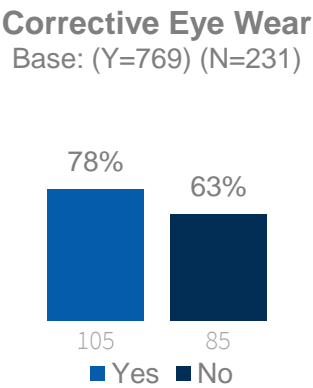
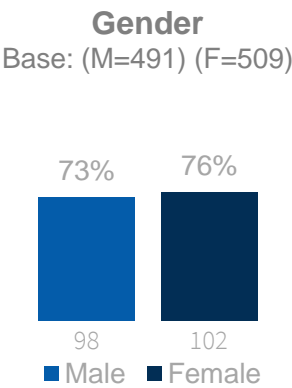
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." L. Early intervention is key to reducing the amount of vision loss caused by myopia/nearsightedness.

THREE IN FOUR AMERICANS KNOW THAT MYOPIA CAN BE DIAGNOSED THROUGH A COMPREHENSIVE EYE EXAM.

“Myopia/Nearsightedness can be diagnosed through a comprehensive eye exam.” Please indicate if the statement is true or false.



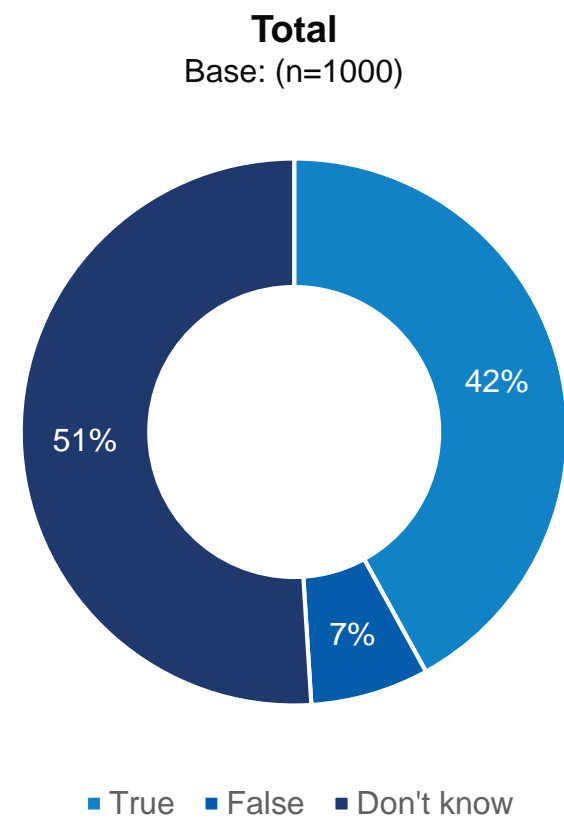
% True



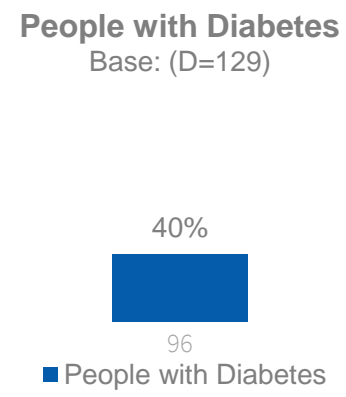
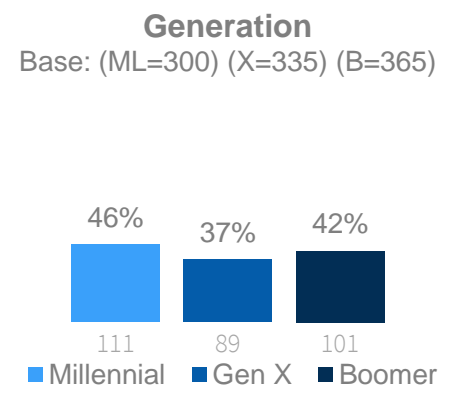
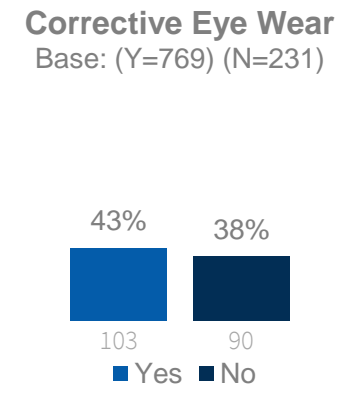
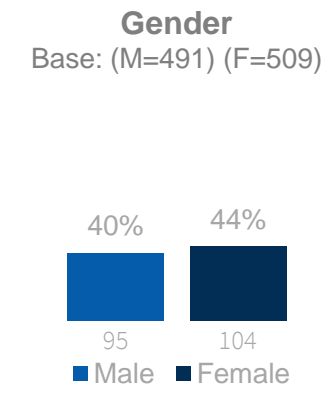
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." K. Myopia/Nearsightedness can be diagnosed through a comprehensive eye exam.

MORE THAN HALF OF AMERICANS (58%) ARE UNAWARE IF MYOPIA IS BECOMING MORE COMMON.

“Instances of myopia/nearsightedness are becoming more and more common.” Please indicate if the statement is true or false.



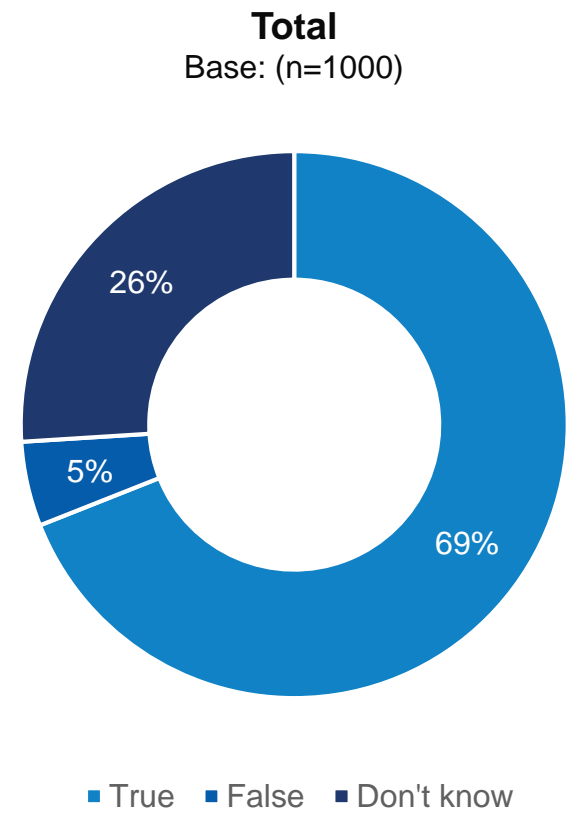
% True



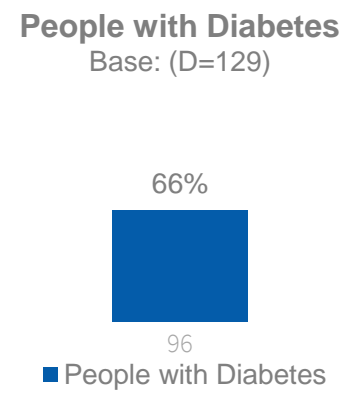
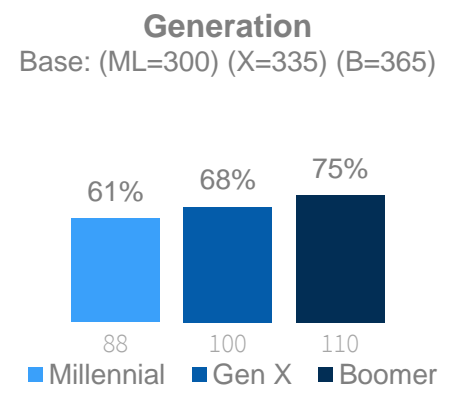
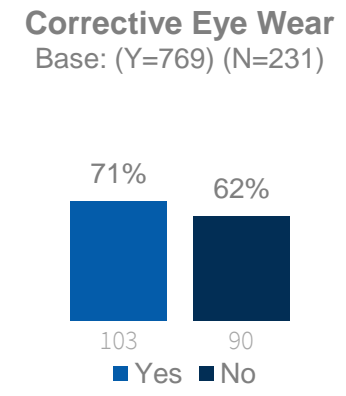
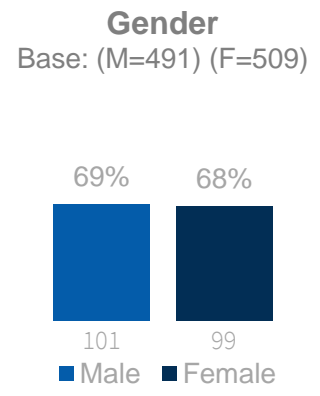
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." D. Instances of myopia/nearsightedness are becoming more and more common.

SEVEN IN TEN AMERICANS BELIEVE MYOPIA CAN WORSEN WITH AGE.

“Myopia/Nearsightedness can worsen with age.” Please indicate if the statement is true or false.



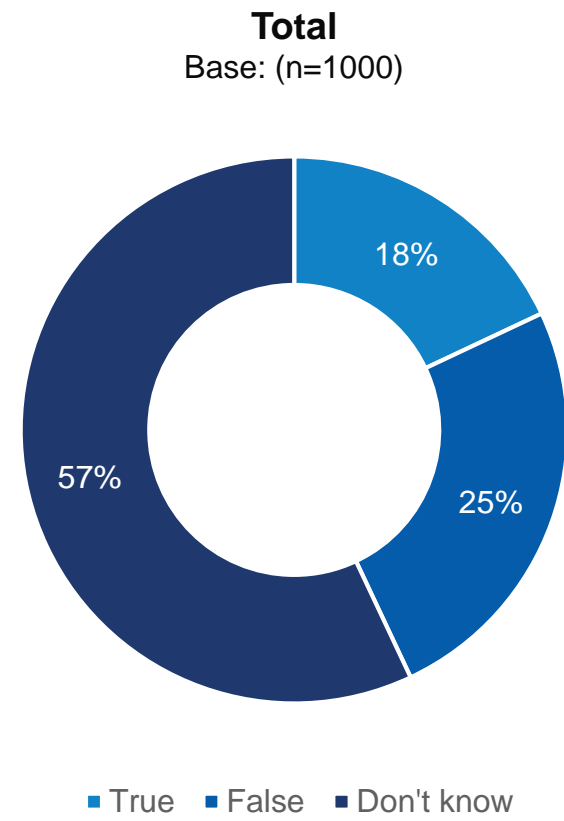
% True



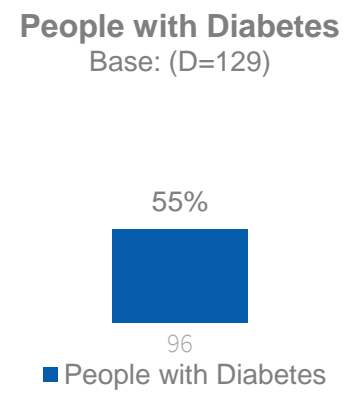
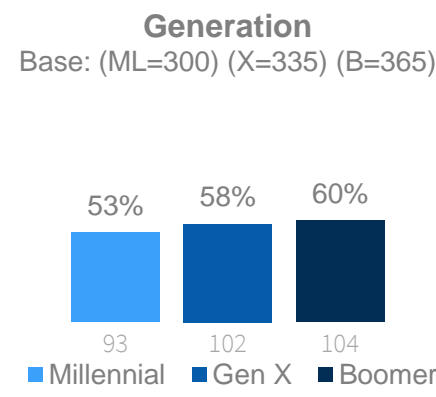
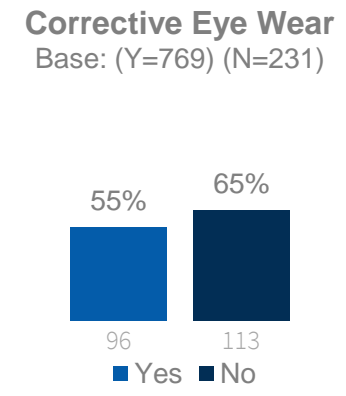
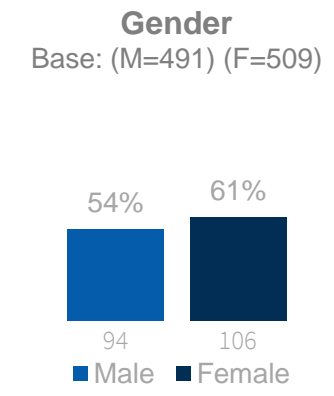
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." C. Myopia/Nearsightedness can worsen with age.

ONLY ONE IN FIVE AMERICANS KNOW THAT SPENDING TOO MUCH TIME INDOORS CAN INCREASE THE RISK OF DEVELOPING MYOPIA.

“Spending too much time indoors can increase the risk of developing myopia/nearsightedness.” Please indicate if the statement is true or false.

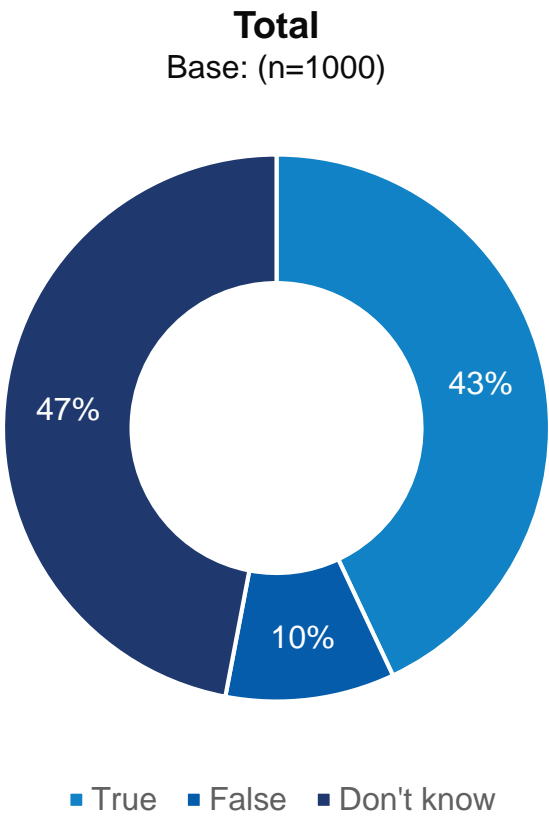


% Don't know



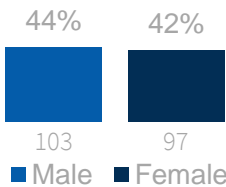
43% OF AMERICANS ARE AWARE THAT THE ODDS OF A CHILD DEVELOPING MYOPIA INCREASE IF THEIR PARENT HAS MYOPIA.

“When a parent has myopia, the odds of their children developing myopia/nearsightedness are higher.” Please indicate if the statement is true or false.

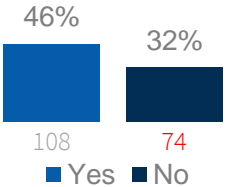


% True

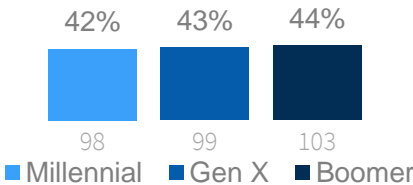
Gender
Base: (M=491) (F=509)



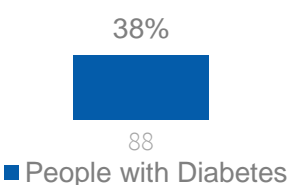
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



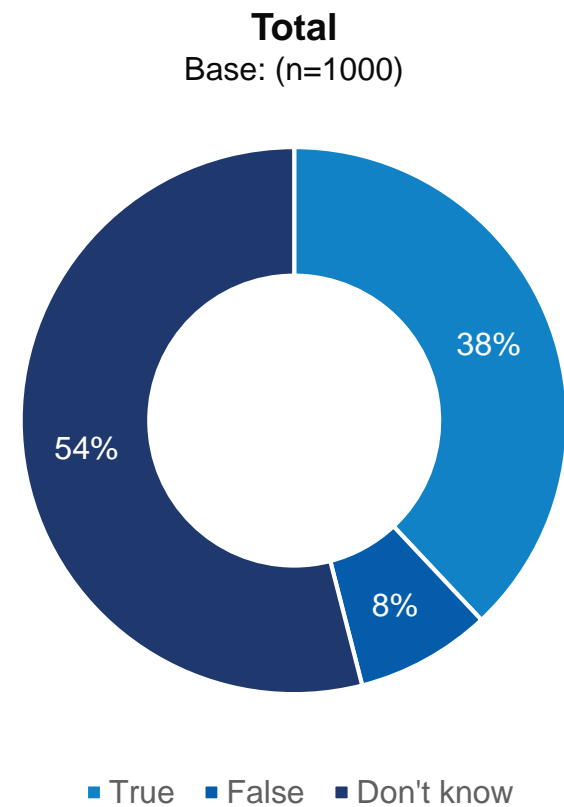
People with Diabetes
Base: (D=129)



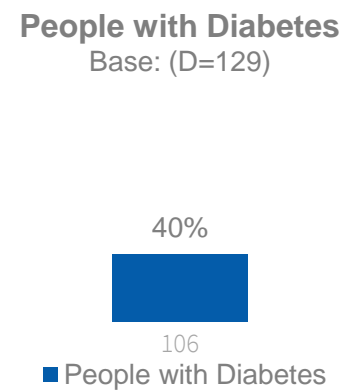
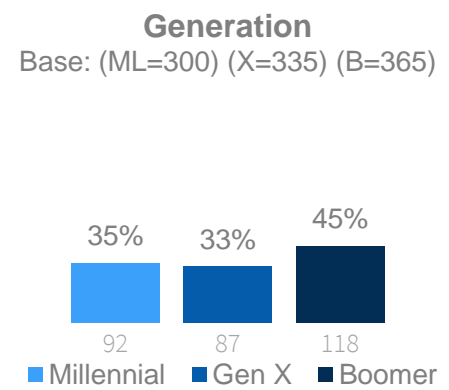
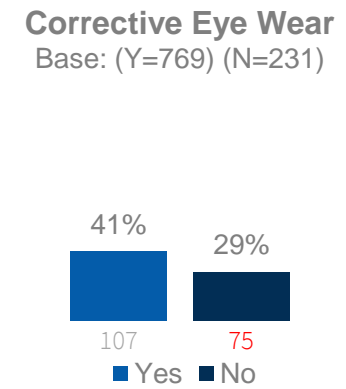
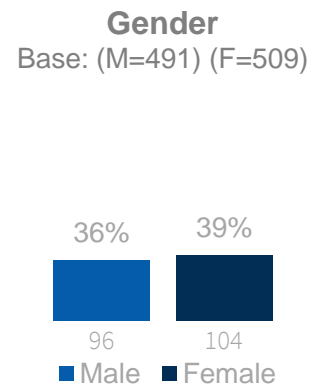
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." I. When a parent has myopia, the odds of their children developing myopia/nearsightedness are higher.

AND NEARLY TWO THIRDS ARE UNAWARE THAT MYOPIA CAN APPEAR BEFORE A CHILD IS ONE YEAR OLD.

“Myopia/Nearsightedness can appear before a child is one year old.” Please indicate if the statement is true or false.



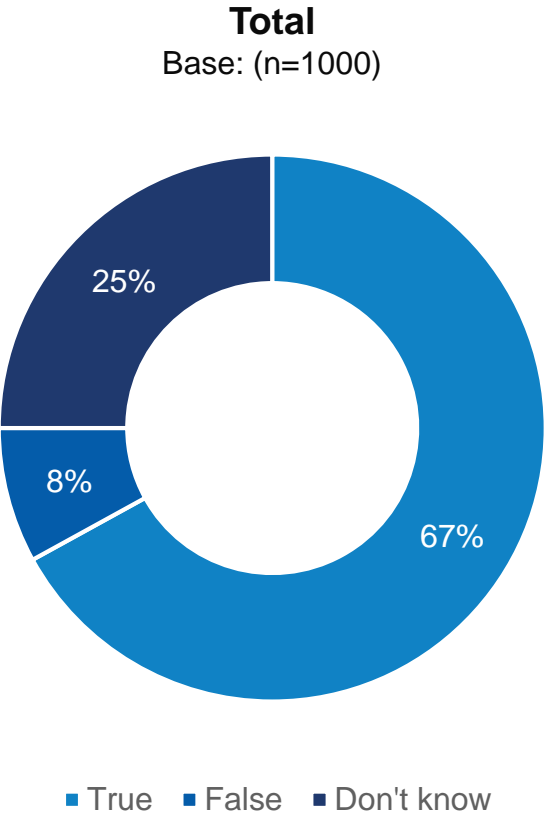
% True



Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." B. Myopia/Nearsightedness can appear before a child is one year old.

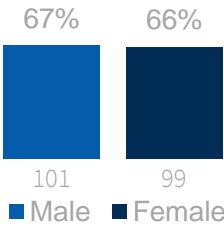
TWO-THIRDS OF AMERICANS BELIEVE MYOPIA CAN CAUSE POOR ACADEMIC PERFORMANCE AND BEHAVIOR ISSUES AT SCHOOL.

“Myopia/Nearsightedness can cause poor academic and behavior issues at school.” Please indicate if the statement is true or false.

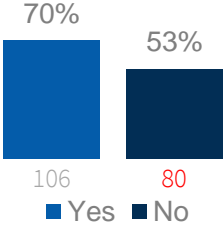


% True

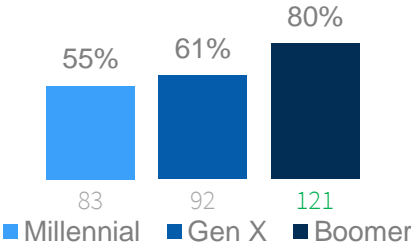
Gender
Base: (M=491) (F=509)



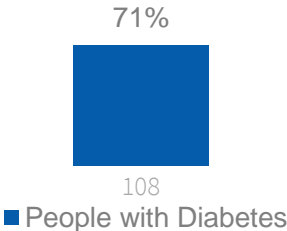
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



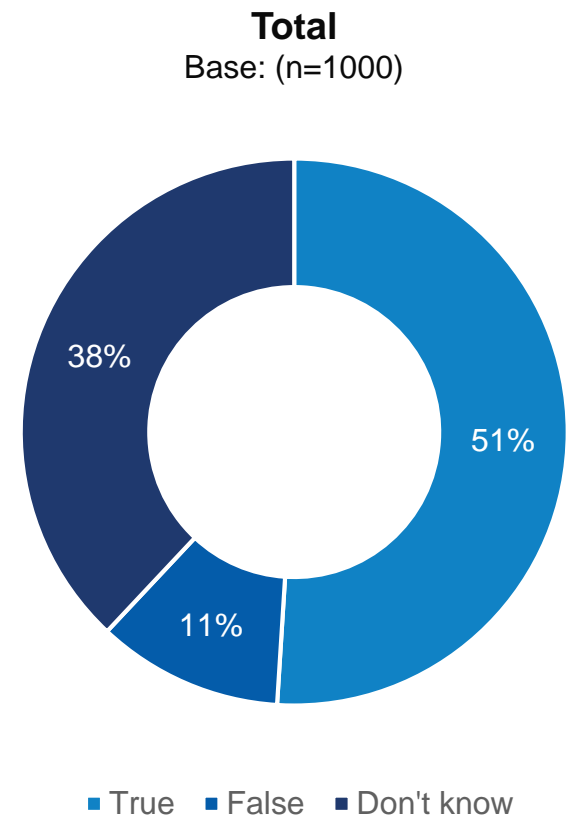
People with Diabetes
Base: (D=129)



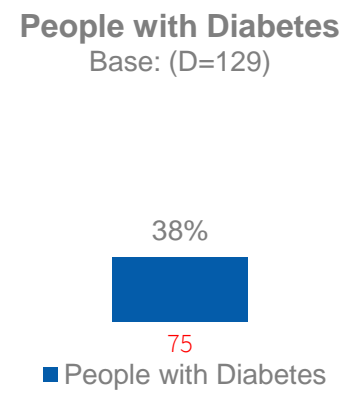
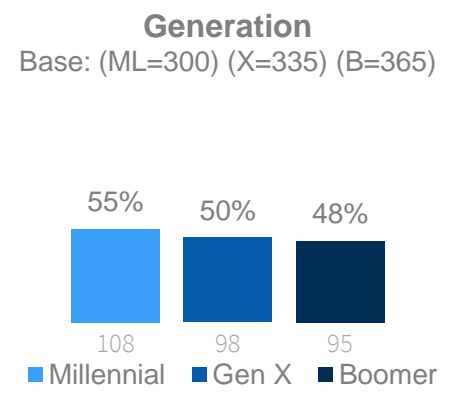
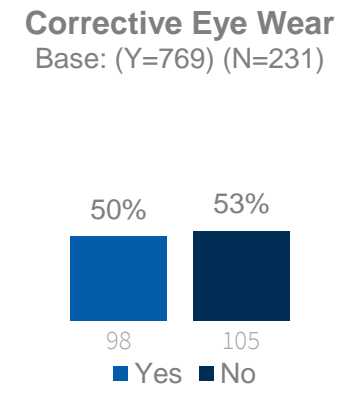
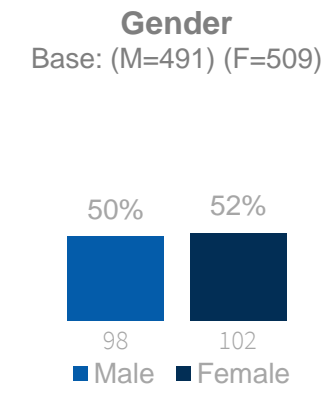
Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." M. Myopia/Nearsightedness can cause poor academic and behavior issues at school.

HALF OF AMERICANS ALSO BELIEVE SPENDING A LOT OF TIME ON DIGITAL DEVICES CAN INCREASE THE RISK OF DEVELOPING MYOPIA.

“Spending a lot of time on computers, smartphones, and tablets can increase the risk of developing myopia/nearsightedness.”
Please indicate if the statement is true or false.



% True

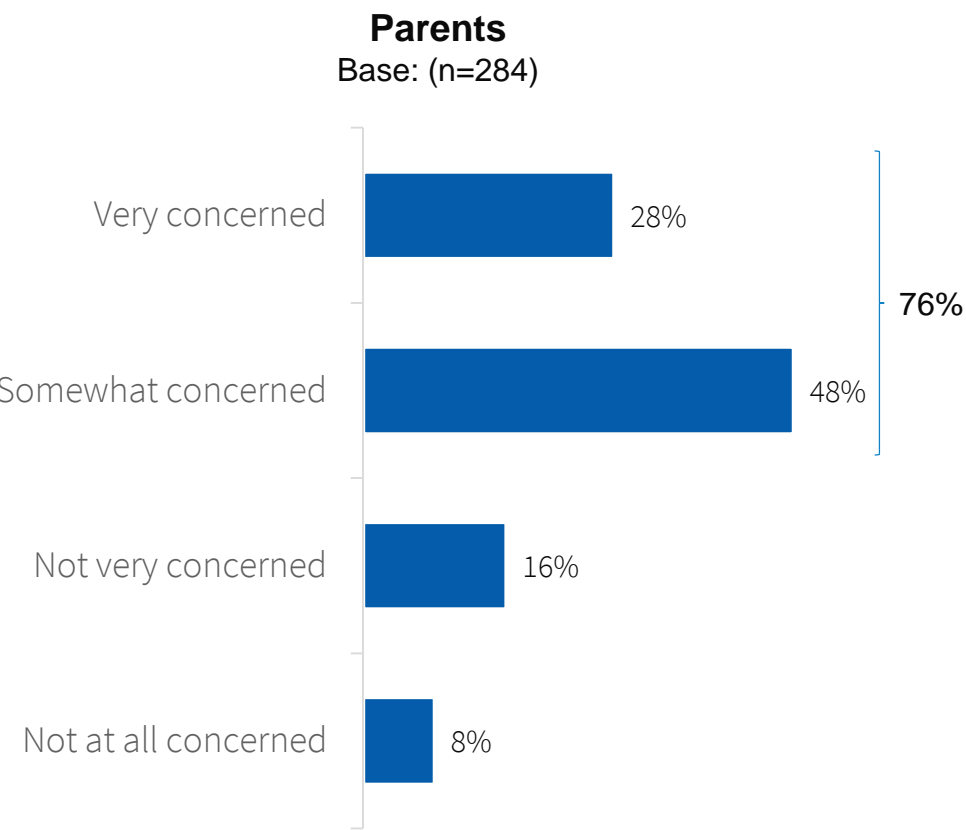


Q58. Below is a series of statements about myopia/nearsightedness. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." H. *Spending a lot of time on computers, smartphones, and tablets can increase the risk of developing myopia/nearsightedness.*

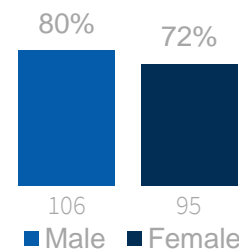
THREE-FOURTHS OF PARENTS ARE CONCERNED THEIR CHILDREN MAY DAMAGE THEIR EYES DUE TO PROLONGED USE OF ELECTRONIC DEVICES.

How concerned are you that your child(ren) may damage their eyes due to prolonged use of computers/hand-held electronic devices?

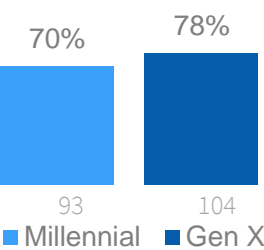
% Very concerned or somewhat concerned



Parents by Gender
Base: (M=126) (F=158)



Parents by Generation
Base: (ML=117) (X=137)

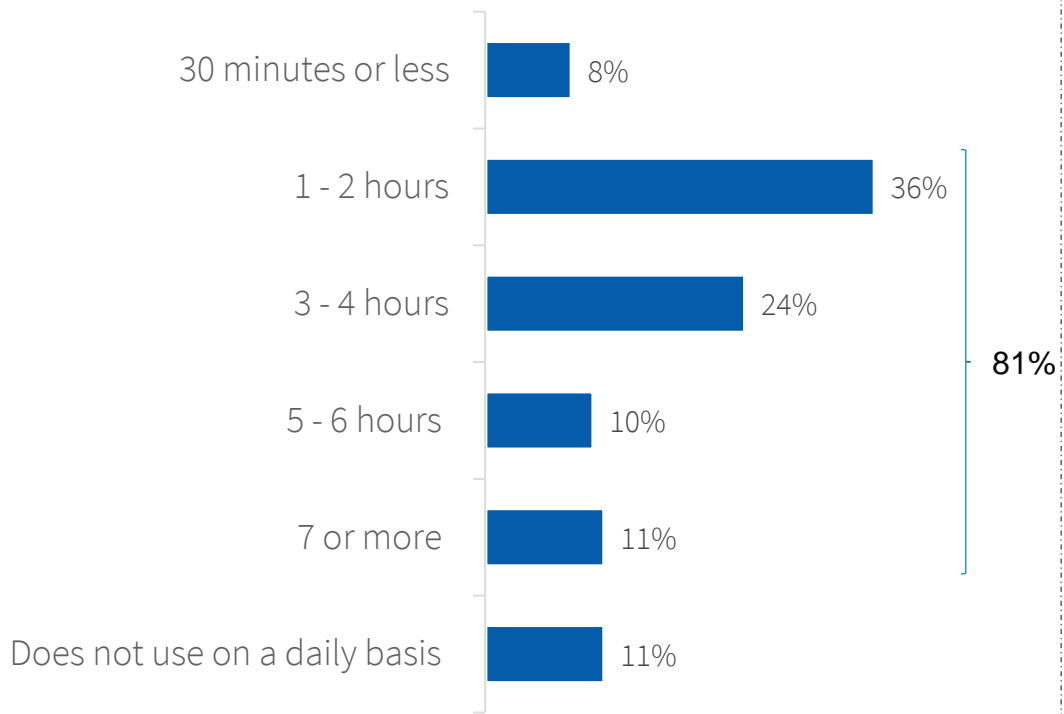


Note: Base sizes are too low to show breakouts of Boomer parents, parents with/without corrective eyewear, and parents with diabetes.

YET, FOUR IN FIVE PARENTS SAY THEIR CHILD SPENDS AT LEAST AN HOUR USING A COMPUTER OR MOBILE DEVICE.

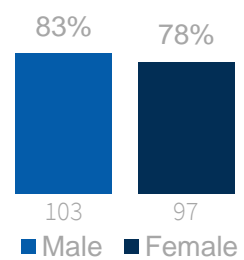
On an average day, approximately how long does your child use a computer, video game, or mobile device/smartphone to view content?

Parents
Base: (n=284)

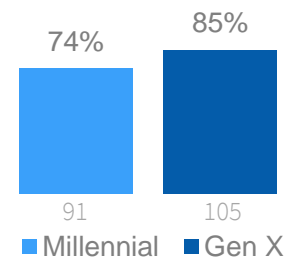


% At least one hour

Parents by Gender
Base: (M=126) (F=158)



Parents by Generation
Base: (ML=117) (X=137)



Note: Base sizes are too low to show breakouts of Boomer parents, parents with/without corrective eyewear, and parents with diabetes.



TRACKING QUESTIONS (SLIDES 7-42)



COMPREHENSIVE EYE EXAM (SLIDES 43-56)



PEDIATRICS (SLIDES 57-80)



DIABETES (SLIDES 81-100)



CONTACT LENSES AND GLASSES (SLIDES 101-135)

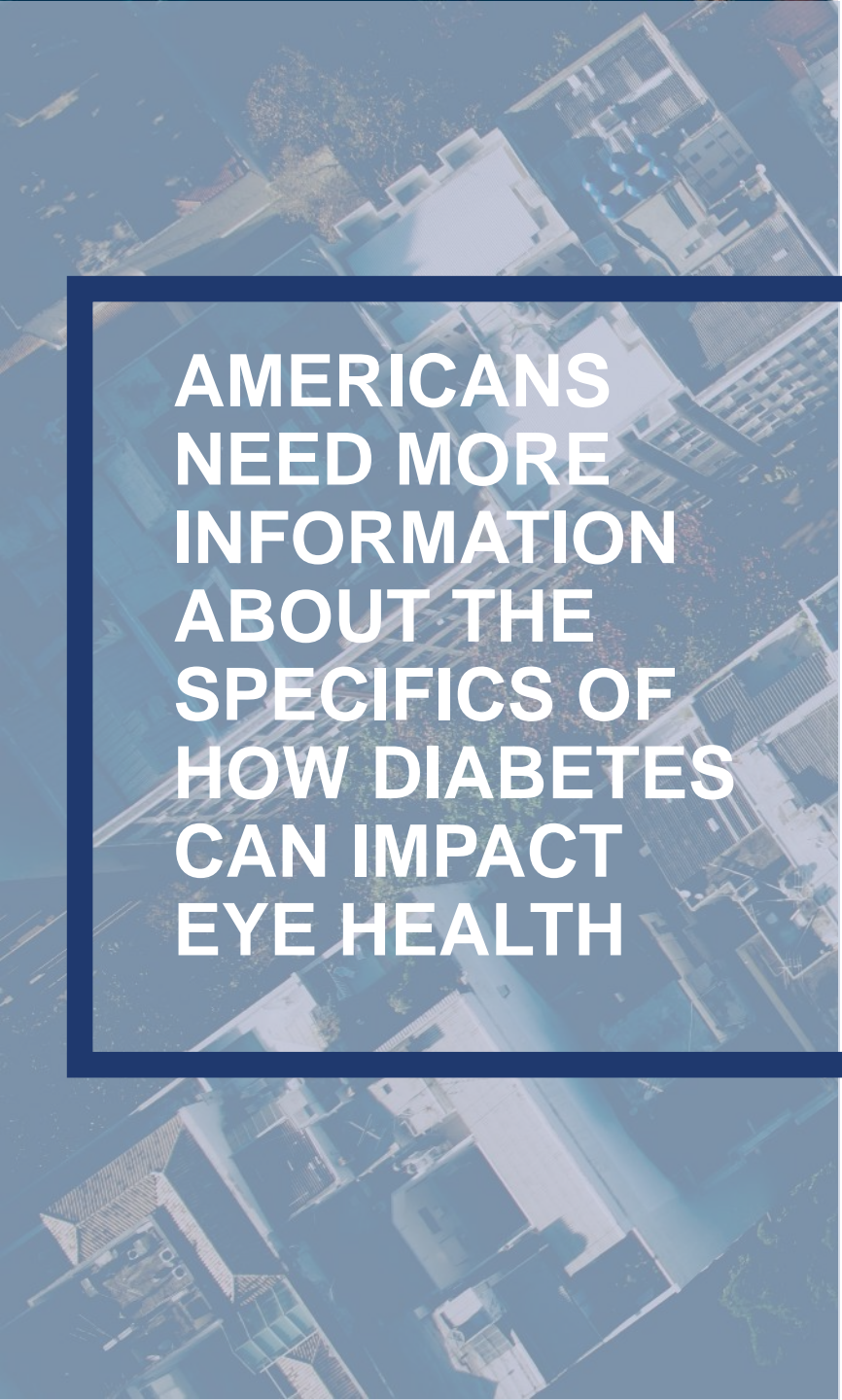


ONLINE VISION SCREENING APPS (SLIDES 136-143)



GAMING/SPORTS (SLIDES 144-149)





AMERICANS NEED MORE INFORMATION ABOUT THE SPECIFICS OF HOW DIABETES CAN IMPACT EYE HEALTH

Most Americans are aware of and concerned about the link between diabetes and eye health, but many are unsure about the specifics.

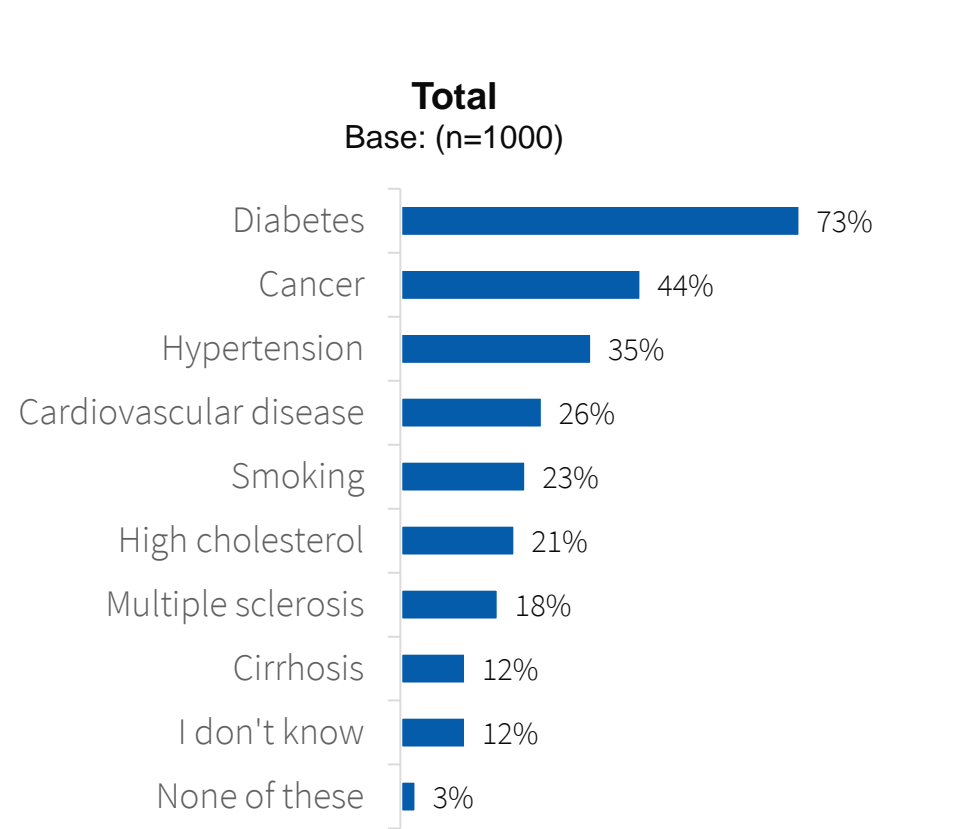
- Nearly three-fourths (73%) think that diabetes could lead to blindness
- Two in five (38%) don't know that diabetes is the leading cause of preventable blindness.
- Blindness tops the list as the most concerning side effect of diabetes for Americans. Two in five (40%) consider blindness to be the most concerning side effect of diabetes – more than heart problems (22%) or kidney failure (21%).
- More than a third (35%) are unsure whether a comprehensive eye exam is the only way to determine if a patient's diabetes will cause blindness (compared to 56% who believe this is true).
- Nearly half (48%) don't know whether diabetic eye diseases have visible symptoms.
- Americans are also unsure of how to improve loss of sight from diabetes. About half (53%) don't know if diabetic blindness can be reversed through diet, exercise, and weight loss (compared to only 28% who believe this is true).

Many Americans with diabetes are not talking with an eye health professional about their diagnosis

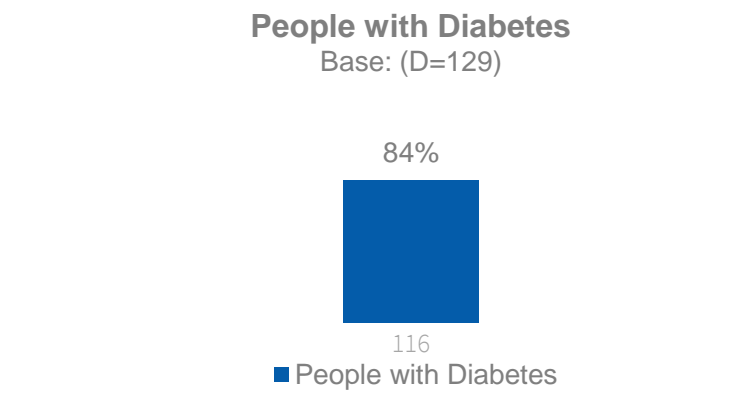
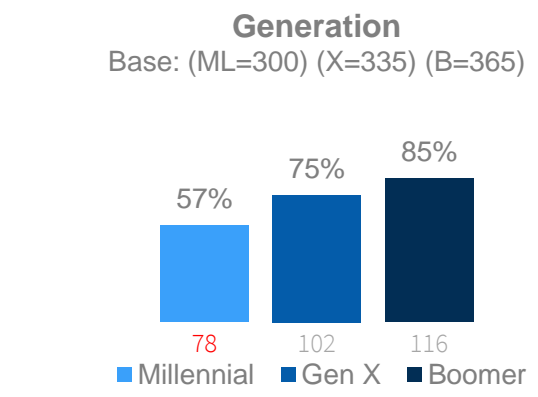
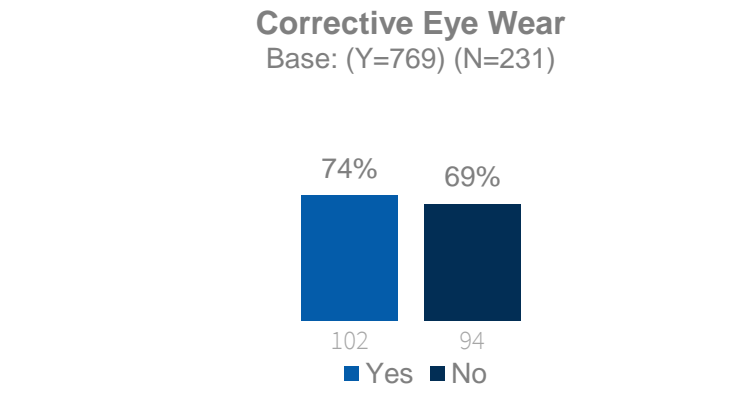
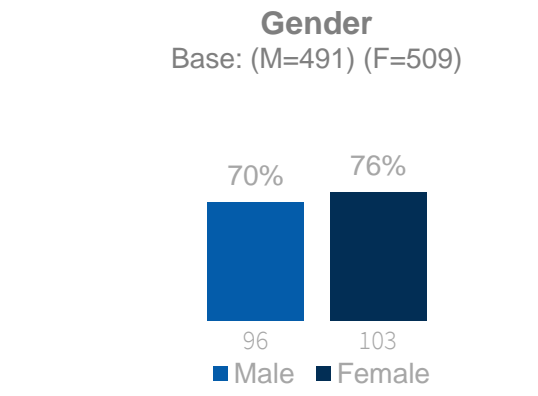
- More than half (54%) of Americans with diabetes have not visited an eye doctor to understand the impact of diabetes on their overall eye health.
- The vast majority (81%) did not have their diabetes detected by an eye health professional, but 66% did have their eye doctor diagnose them with other related eye complications.

NEARLY THREE-FOURTHS OF AMERICANS ARE AWARE OF THE LINK BETWEEN DIABETES AND EYE HEALTH.

Which, if any, of the following do you think could lead to blindness?



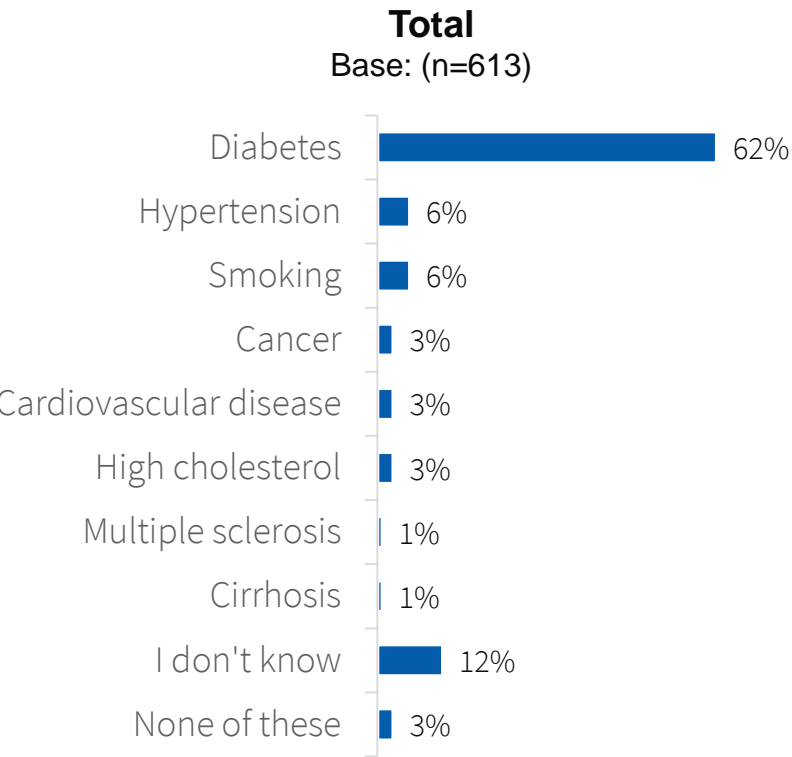
% Diabetes



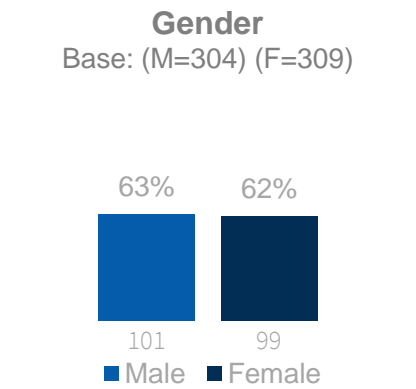
Q69. Which, if any, of the following do you think could lead to blindness?

TWO IN FIVE AMERICANS DON'T KNOW THAT DIABETES IS THE LEADING CAUSE OF PREVENTABLE BLINDNESS.

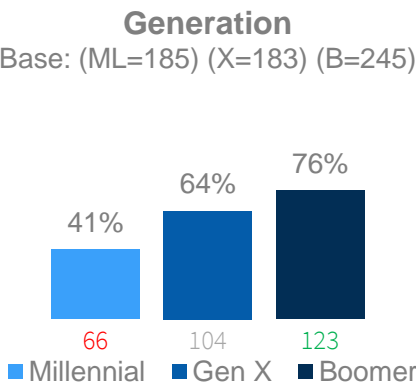
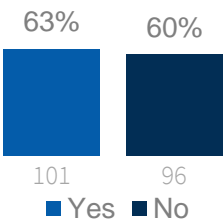
Which of the following do you think is the leading cause of preventable blindness?



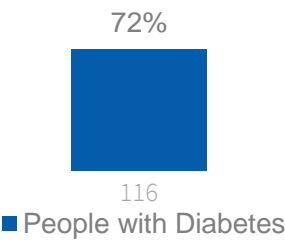
% Diabetes



Corrective Eye Wear
Base: (Y=491) (N=122)

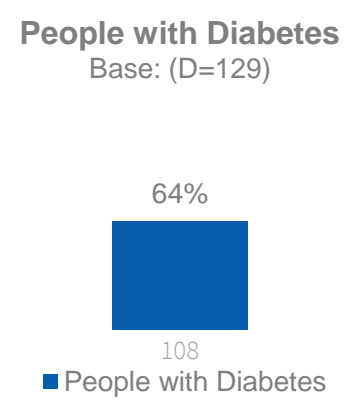
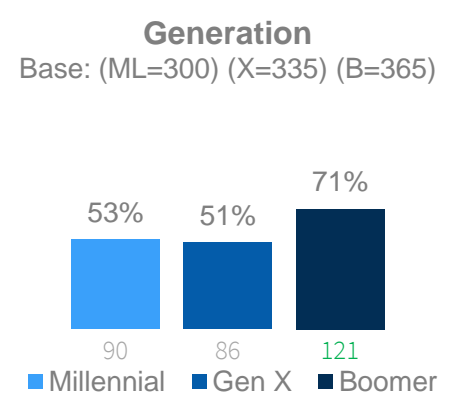
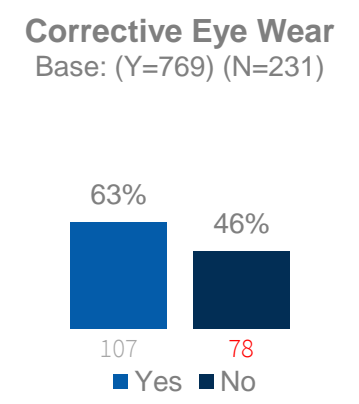
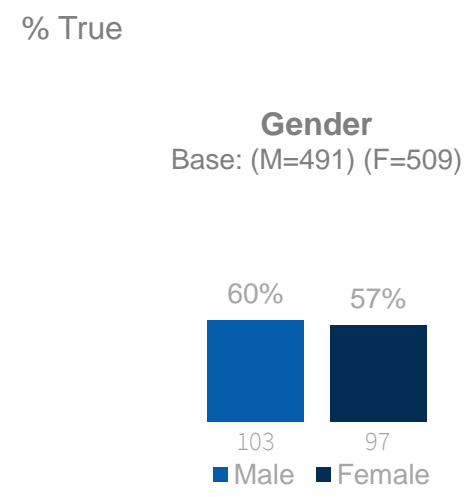
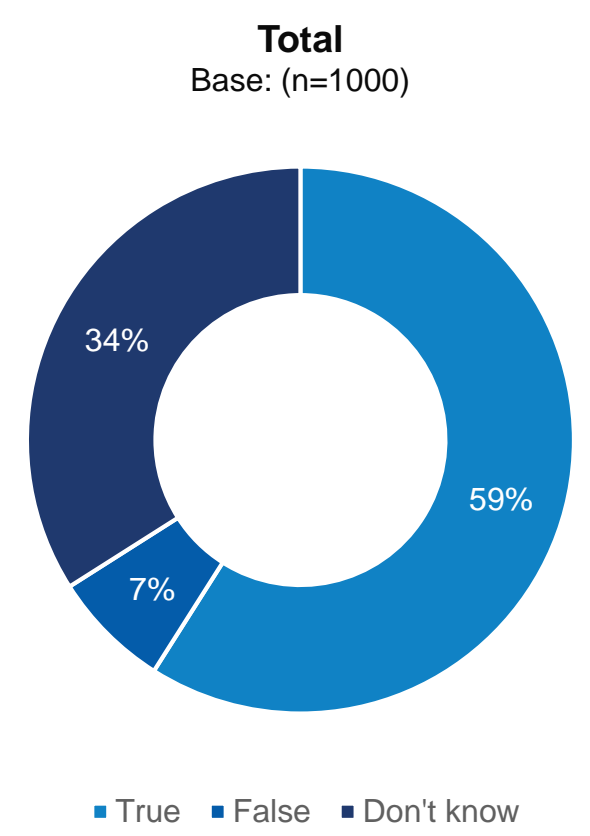


People with Diabetes
Base: (D=82)



OVER A THIRD OF AMERICANS DON'T KNOW THAT OPTOMETRISTS CAN DETECT DIABETES EARLIER THAN PRIMARY CARE PHYSICIANS.

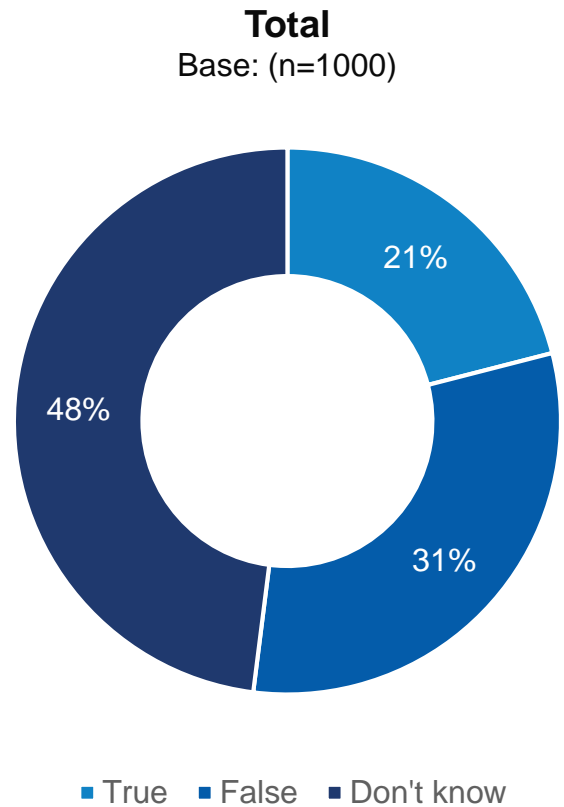
“Eye doctors can sometimes detect and diagnose diabetes before a primary care physician.” Is this statement true or false?



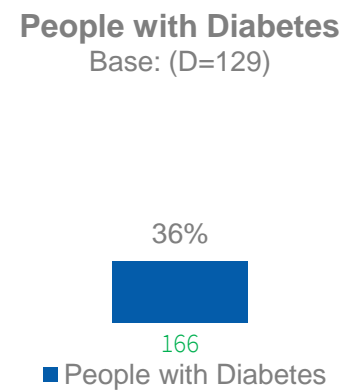
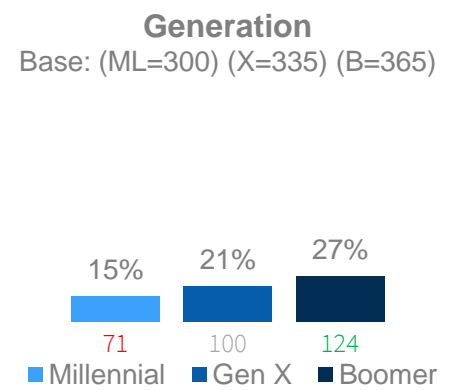
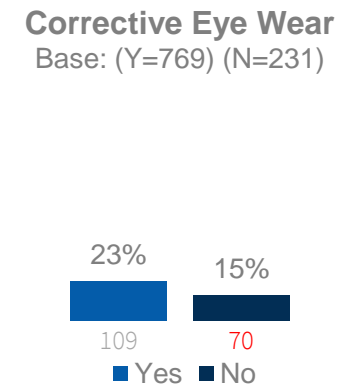
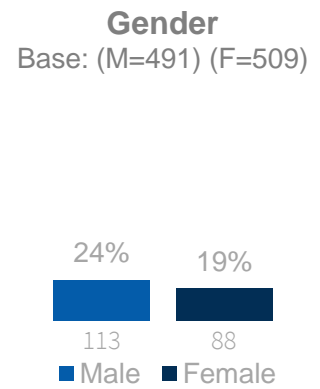
Q71. Please indicate whether each of the following statements about the relationship between diabetes and eye health is true or false. If you aren't sure whether a statement is true or false, please select "Don't know."
Eye doctors can sometimes detect and diagnose diabetes before a primary care physician.

NEARLY HALF OF AMERICANS DON'T KNOW IF DIABETIC EYE DISEASES HAVE VISIBLE SYMPTOMS.

“Diabetic eye diseases have no visible symptoms.” Is this statement true or false?



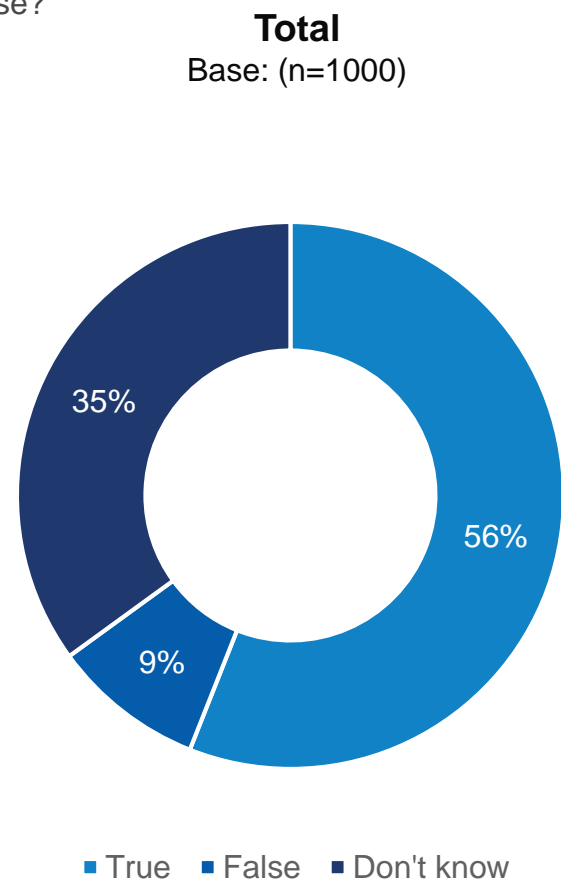
% True



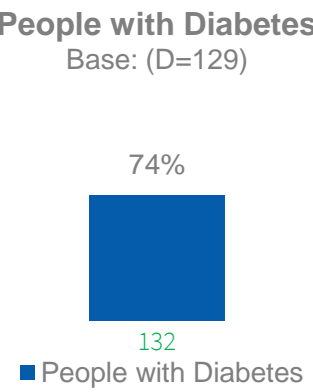
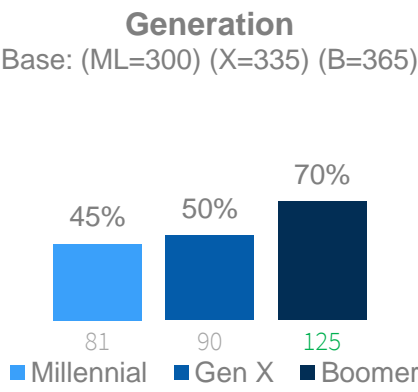
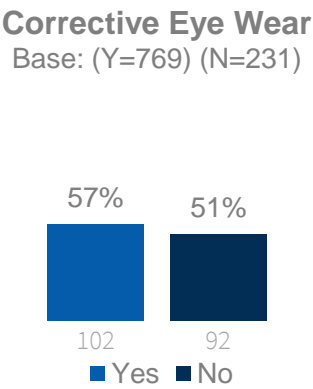
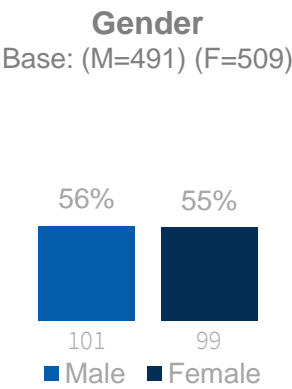
Q71. Please indicate whether each of the following statements about the relationship between diabetes and eye health is true or false. If you aren't sure whether a statement is true or false, please select "Don't know."
Diabetic eye diseases have no visible symptoms.

WHEREAS, MORE THAN HALF OF AMERICANS KNOW THAT THE ONLY WAY TO DETERMINE IF A PATIENT’S DIABETES WILL CAUSE BLINDNESS IS THROUGH A COMPREHENSIVE EYE EXAM.

“The only way to determine if a patient's diabetes will cause blindness is through a comprehensive eye exam.” Is this statement true or false?



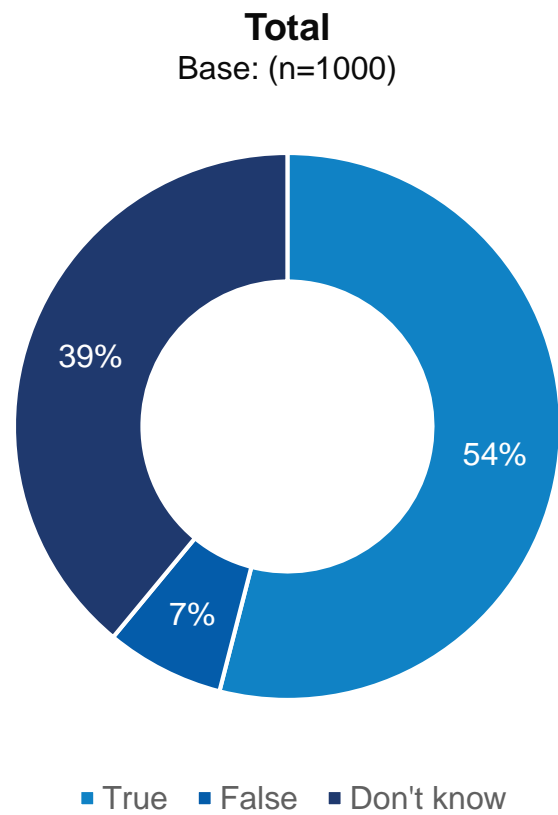
% True



Q71. Please indicate whether each of the following statements about the relationship between diabetes and eye health is true or false. If you aren't sure whether a statement is true or false, please select "Don't know."
The only way to determine if a patient's diabetes will cause blindness is through a comprehensive eye exam.

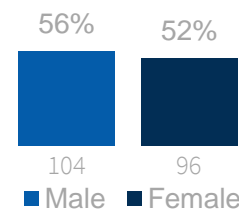
TWO IN FIVE AMERICANS DON'T KNOW THAT DIABETES CAUSES BLINDNESS THROUGH DETERIORATION OF THE OPTIC NERVE.

“Diabetes causes blindness through deterioration of the optic nerve.” Is this statement true or false?

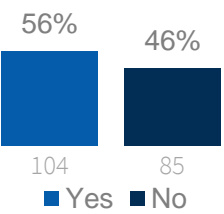


% True

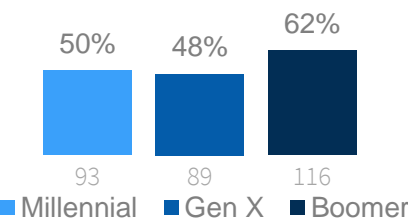
Gender
Base: (M=491) (F=509)



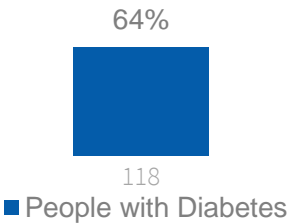
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



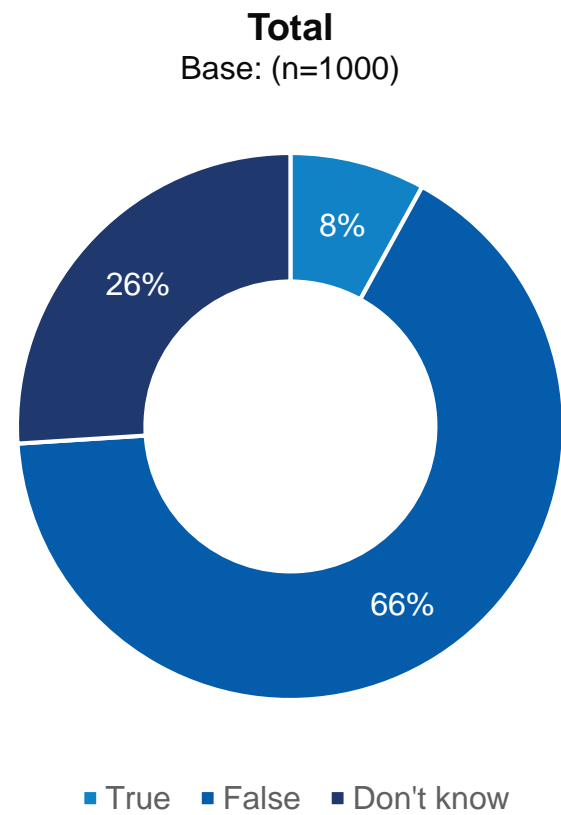
People with Diabetes
Base: (D=129)



Q71. Please indicate whether each of the following statements about the relationship between diabetes and eye health is true or false. If you aren't sure whether a statement is true or false, please select "Don't know."
Diabetes causes blindness through deterioration of the optic nerve.

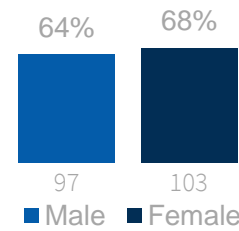
A MERE 8% OF AMERICANS BELIEVE ALL PATIENTS WITH DIABETES WILL EVENTUALLY GO BLIND.

“All patients with diabetes will eventually go blind.” Is this statement true or false?

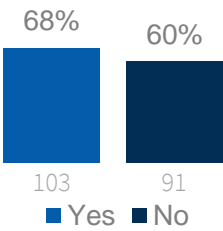


% False

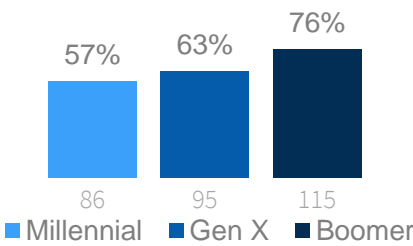
Gender
Base: (M=491) (F=509)



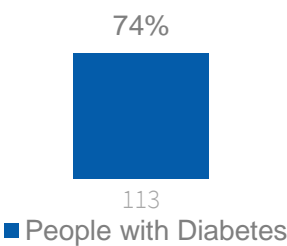
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



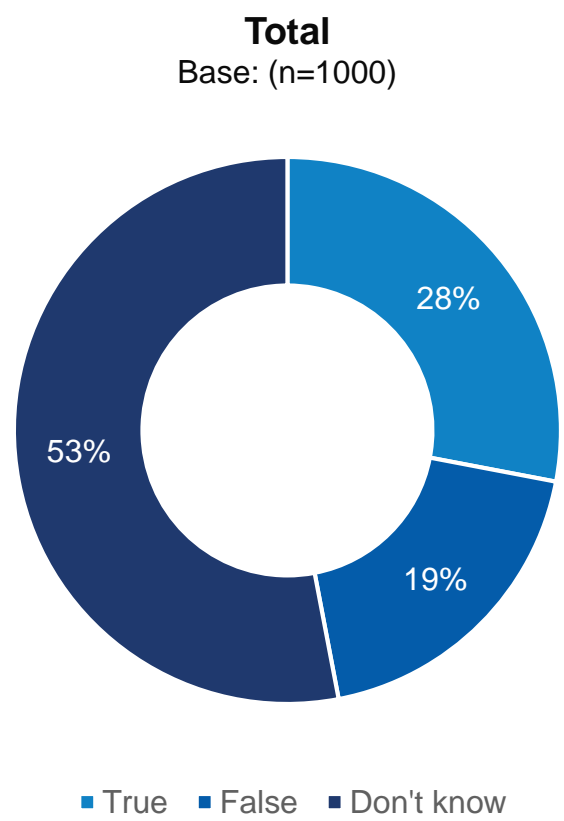
People with Diabetes
Base: (D=129)



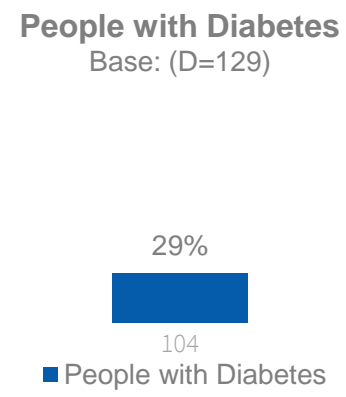
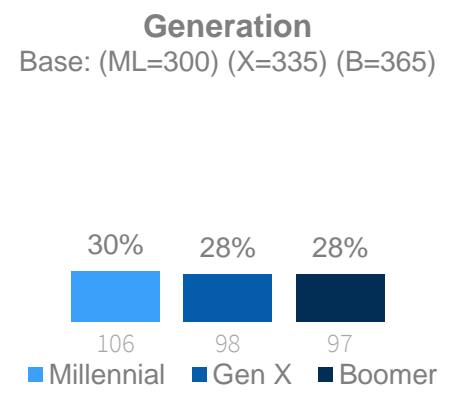
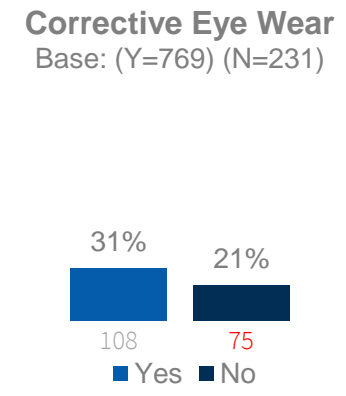
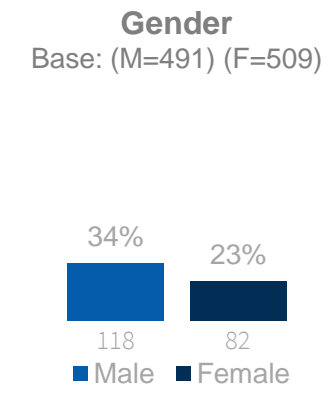
Q71. Please indicate whether each of the following statements about the relationship between diabetes and eye health is true or false. If you aren't sure whether a statement is true or false, please select "Don't know."
All patients with diabetes will eventually go blind.

ONLY 28% OF PEOPLE BELIEVE DIABETIC BLINDNESS CAN BE REVERSED THROUGH LIFESTYLE CHANGES.

“Diabetic blindness can be reversed through diet, exercise, and weight loss.” Is this statement true or false?



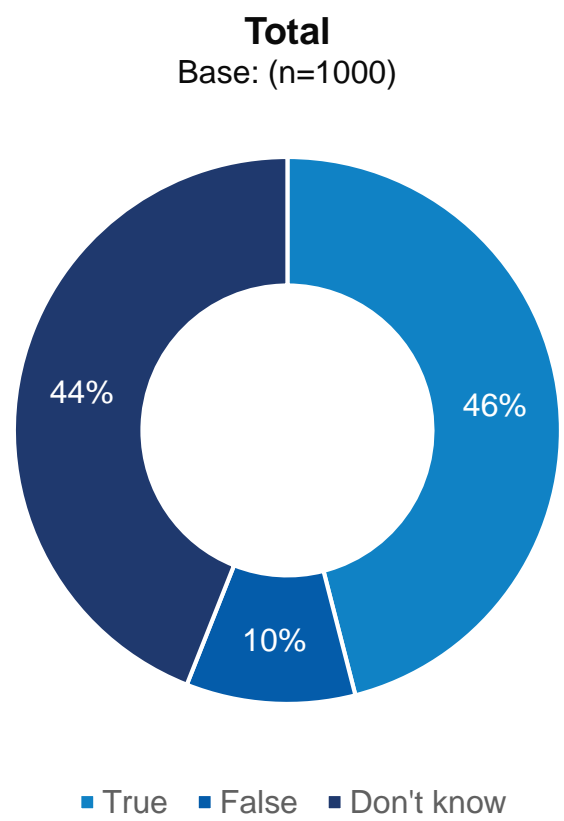
% True



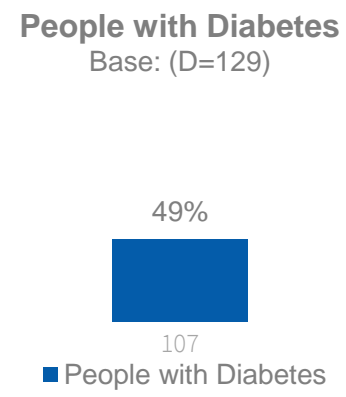
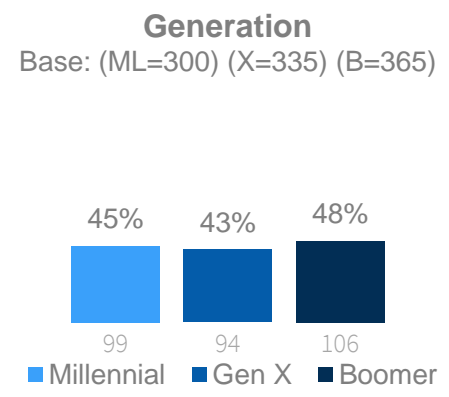
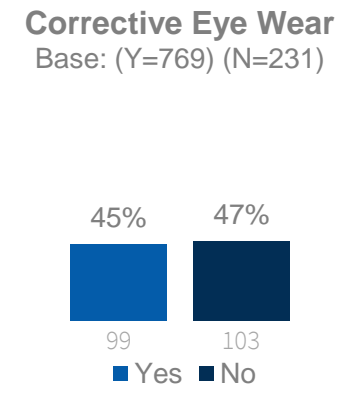
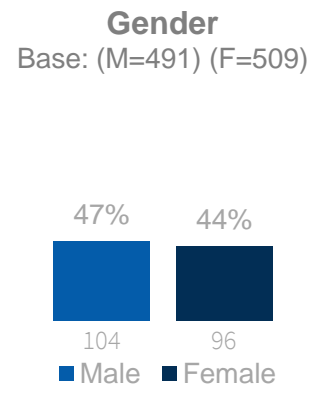
Q71. Please indicate whether each of the following statements about the relationship between diabetes and eye health is true or false. If you aren't sure whether a statement is true or false, please select "Don't know."
Diabetic blindness can be reversed through diet, exercise, and weight loss.

NEARLY HALF OF AMERICANS THINK PEOPLE WITH DIABETES SHOULD HAVE AN X-RAY AT LEAST EVERY TWO YEARS IN ORDER TO TEST FOR BLINDNESS, BUT 44% DON'T KNOW.

“People with diabetes should have an x-ray on their eyes at least every two years in order to test for blindness.” Is this statement true or false?



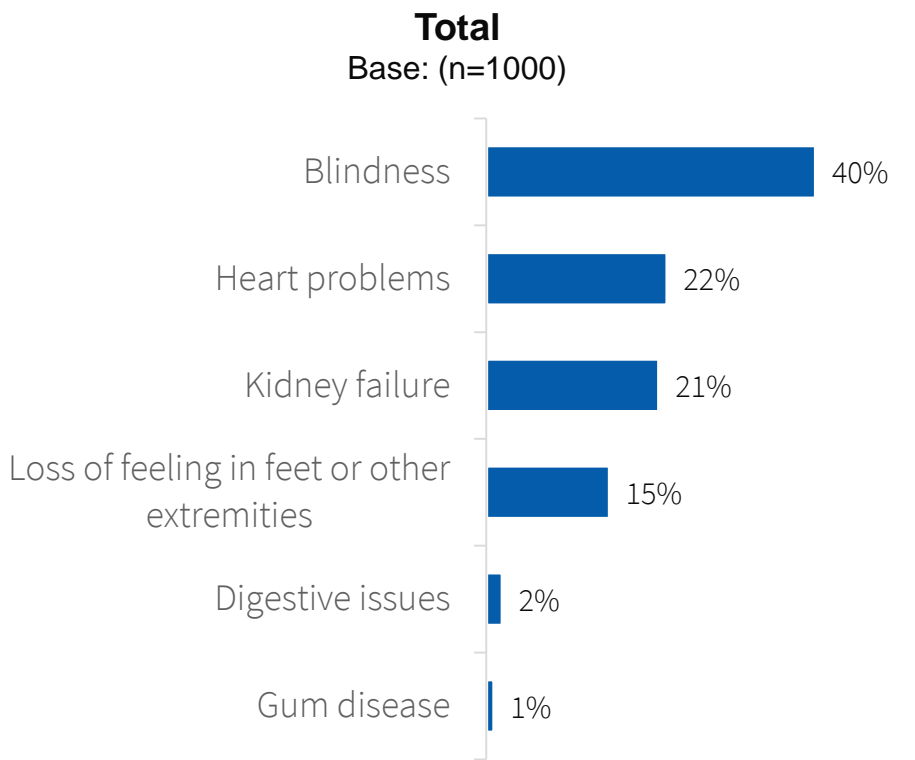
% True



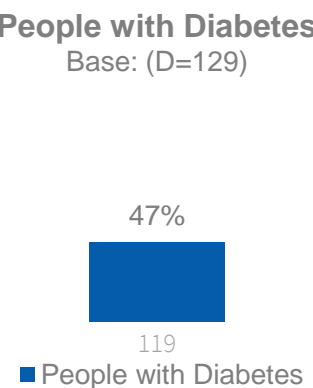
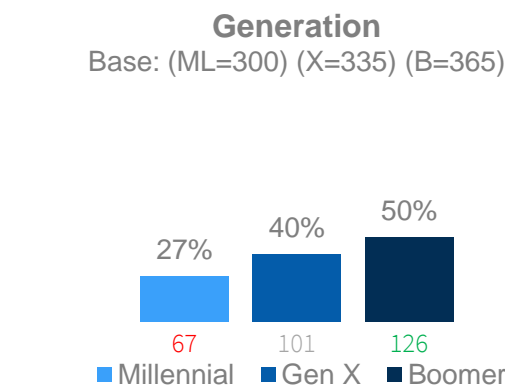
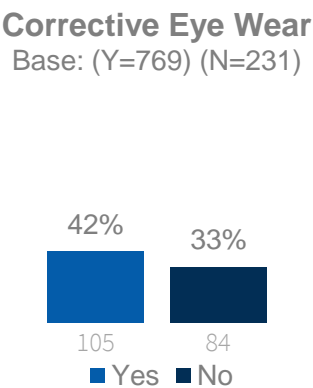
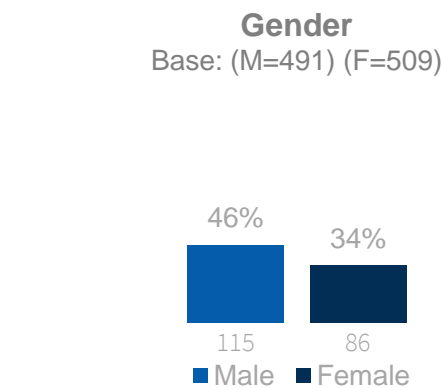
Q71. Please indicate whether each of the following statements about the relationship between diabetes and eye health is true or false. If you aren't sure whether a statement is true or false, please select "Don't know."
People with diabetes should have an x-ray on their eyes at least every two years in order to test for blindness.

TWO IN FIVE AMERICANS CONSIDER BLINDNESS TO BE THE MOST CONCERNING SIDE EFFECT OF DIABETES – THIS IS MORE THAN HEART PROBLEMS OR KIDNEY FAILURE.

Which of the following side effects of diabetes do you find most concerning?

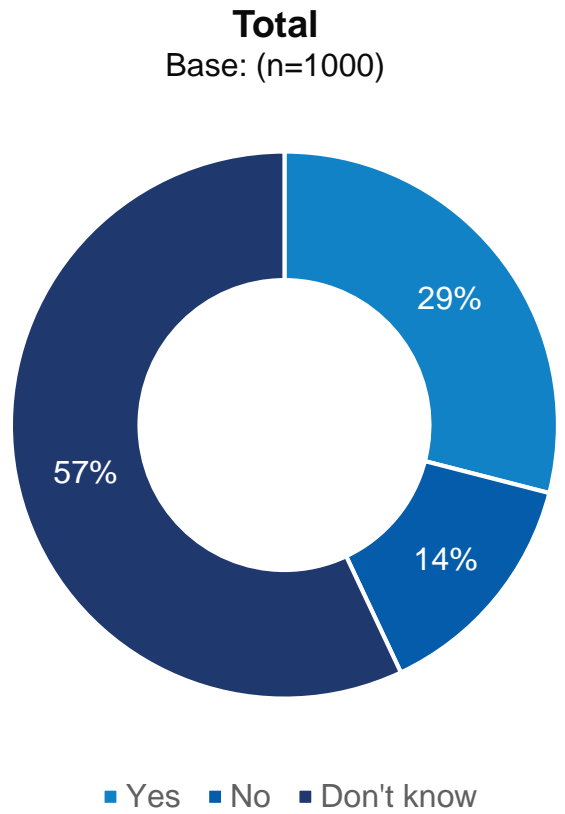


% Blindness

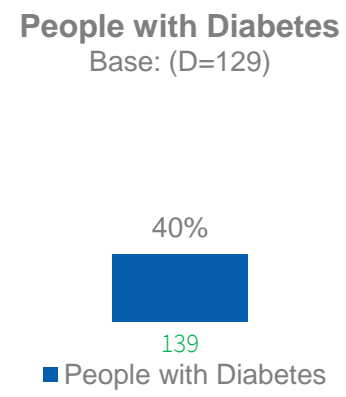
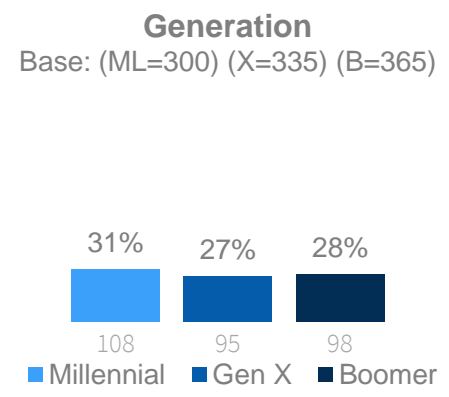
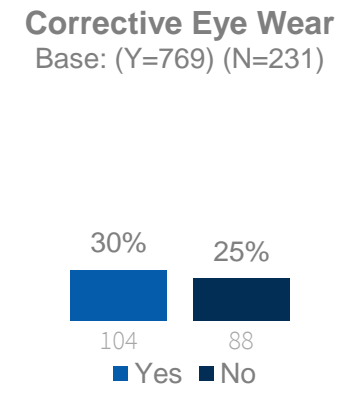
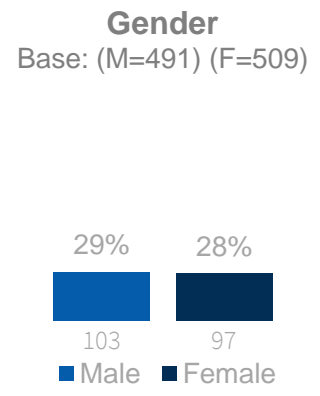


MORE THAN HALF OF AMERICANS DON'T KNOW THAT FLOATERS ARE A SYMPTOM OF DIABETIC EYE DISEASE.

Are floaters a symptom of diabetic eye disease/diabetic retinopathy?

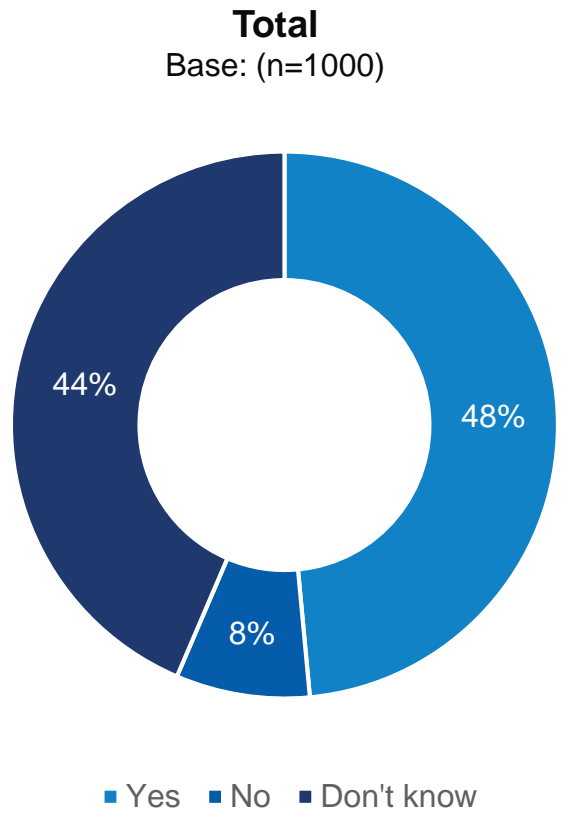


% Yes

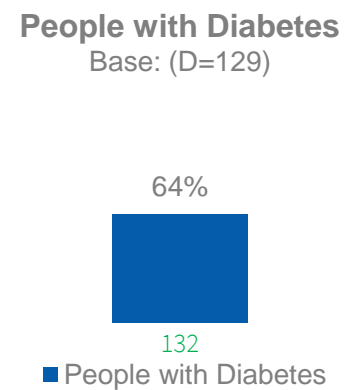
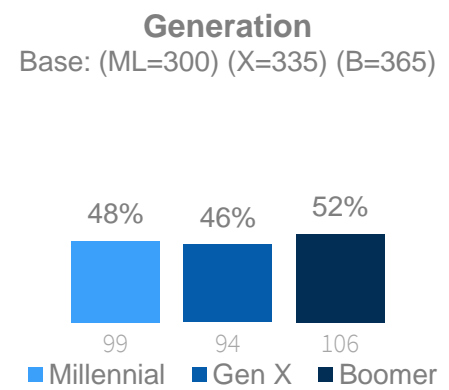
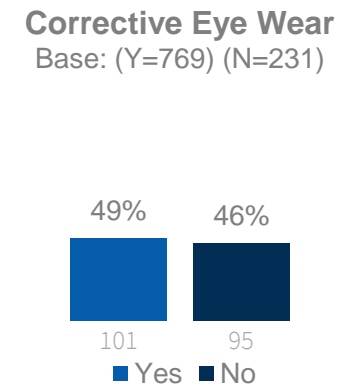
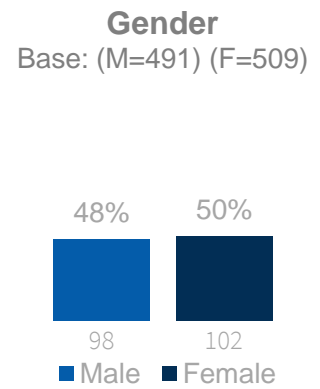


HALF OF AMERICANS BELIEVE BLURRY VISION IS A SYMPTOM OF DIABETIC EYE DISEASE, BUT 44% DON'T KNOW.

Is blurry vision a symptom of diabetic eye disease/diabetic retinopathy?

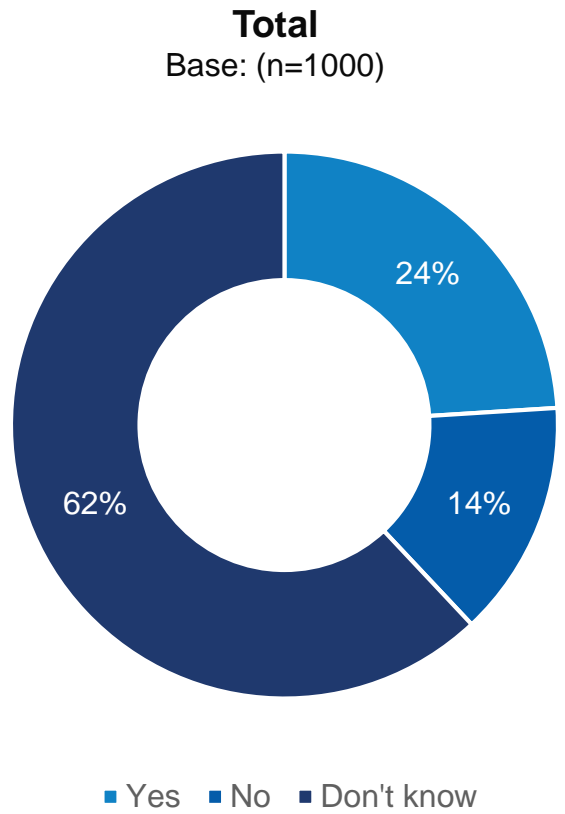


% Yes

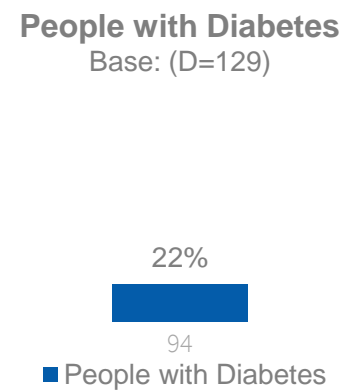
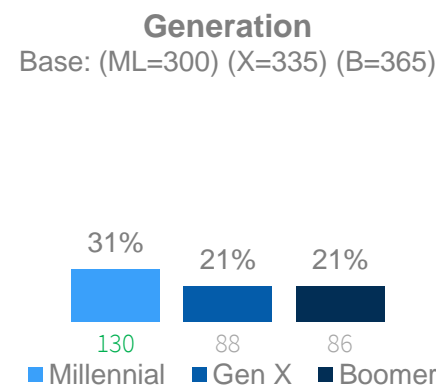
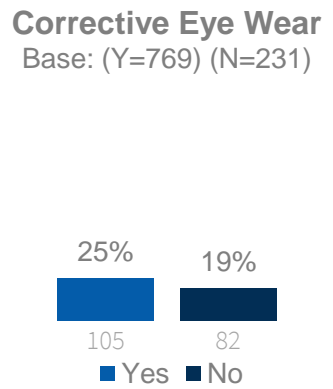
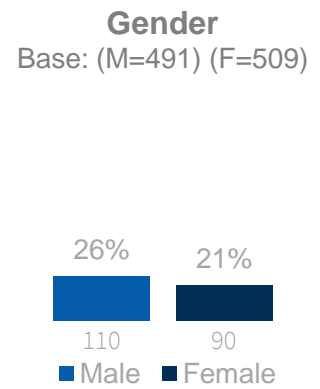


A QUARTER OF AMERICANS THINK REDNESS IN THE EYES IS A SYMPTOM OF DIABETIC EYE DISEASE.

Is redness in the eyes a symptom of diabetic eye disease/diabetic retinopathy?

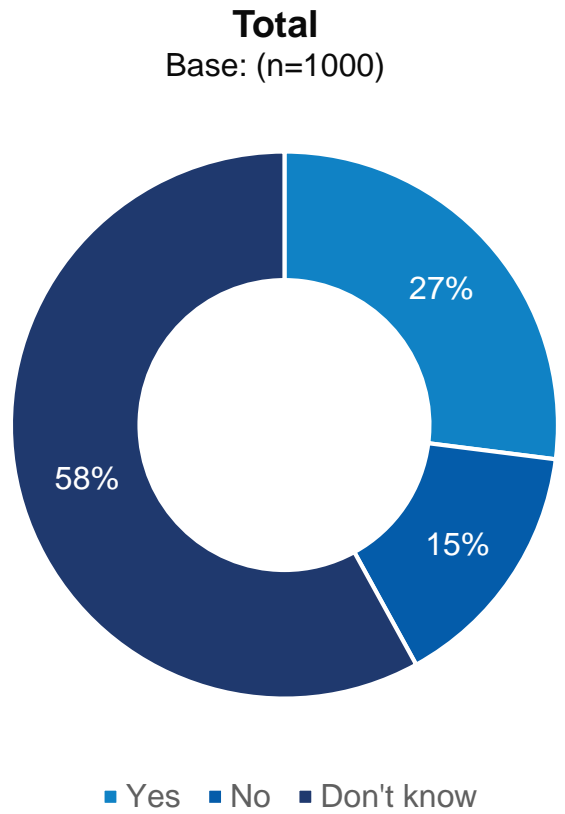


% Yes

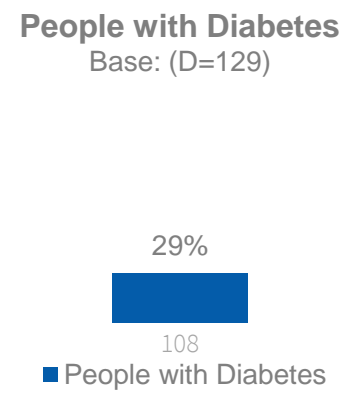
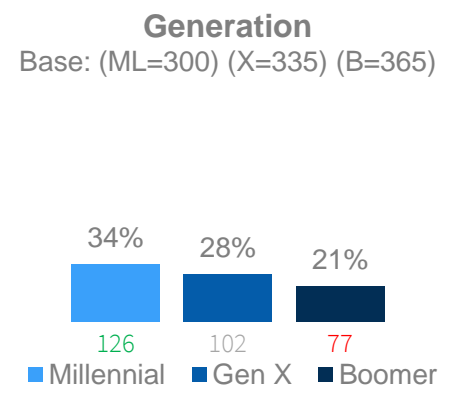
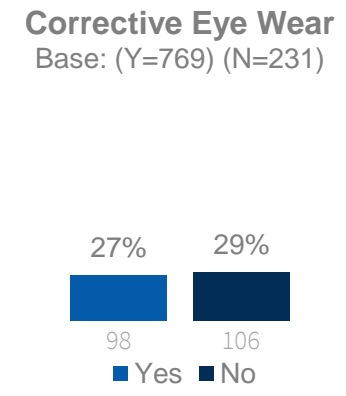
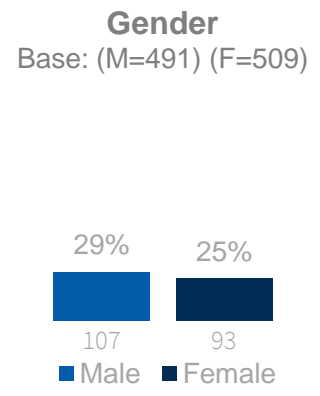


SLIGHTLY MORE THAN A QUARTER OF AMERICANS BELIEVE DRY EYES ARE A SYMPTOM OF DIABETIC EYE DISEASE.

Are dry eyes a symptom of diabetic eye disease/diabetic retinopathy?

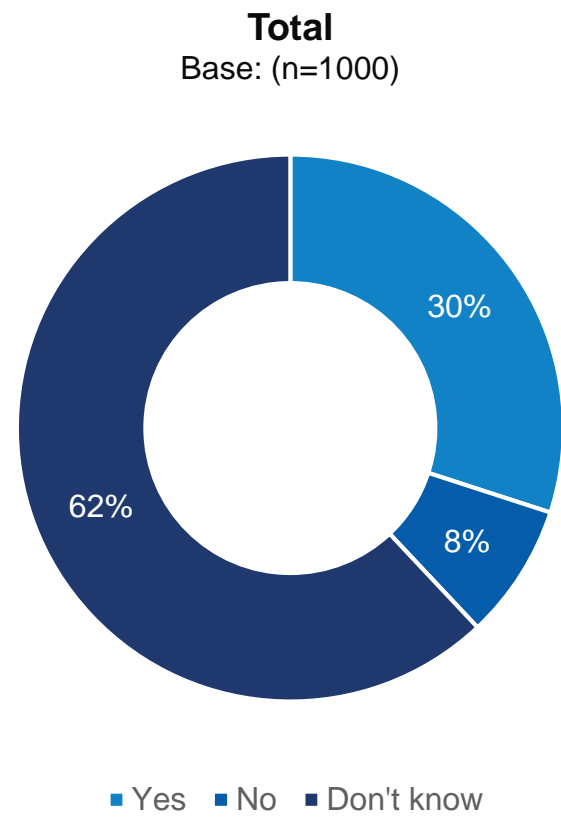


% Yes



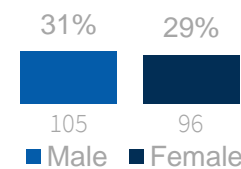
THREE OUT OF FIVE AMERICANS DON'T KNOW IF DRAMATIC CHANGES IN THE SIZE OF THE PUPILS ARE A SYMPTOM OF DIABETIC EYE DISEASE.

Are dramatic changes in the size of the pupils a symptom of diabetic eye disease/diabetic retinopathy?

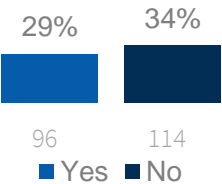


% Yes

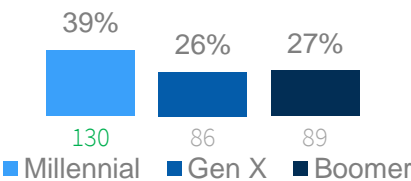
Gender
Base: (M=491) (F=509)



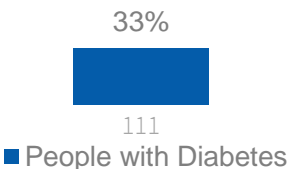
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



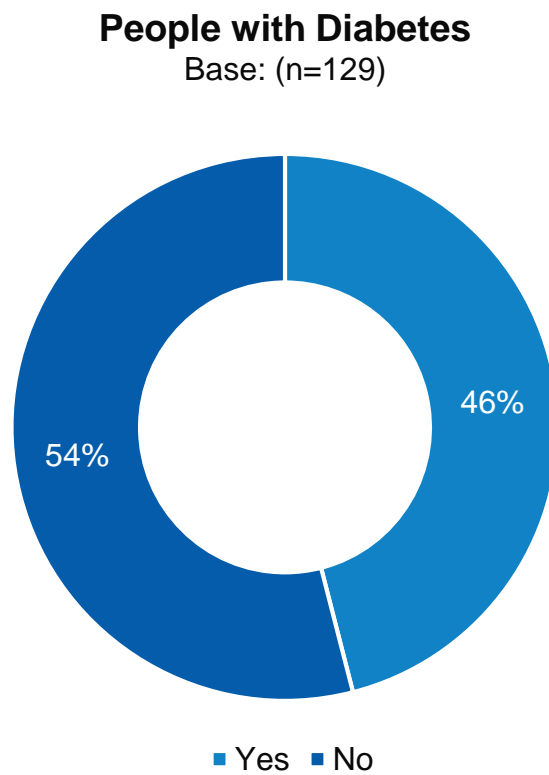
People with Diabetes
Base: (D=129)



Q73. Which of the following are symptoms of diabetic eye disease/diabetic retinopathy?
Dramatic changes in the size of pupils.

CONCERNINGLY, MORE THAN HALF OF AMERICANS WITH DIABETES HAVE NOT VISITED AN EYE DOCTOR TO UNDERSTAND THE IMPACT OF DIABETES ON THEIR OVERALL EYE HEALTH.

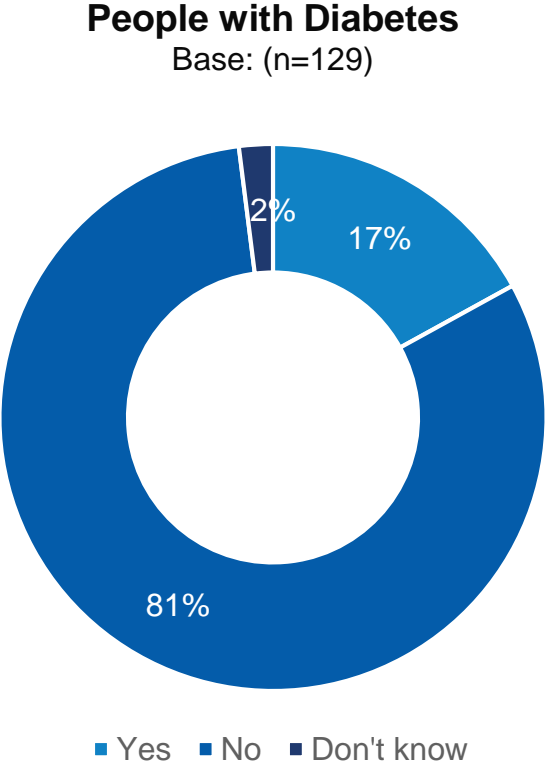
Have you ever visited an eye doctor specifically to understand the impact of your diabetes on your overall eye health?



Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

THE VAST MAJORITY OF AMERICANS WITH DIABETES DIDN'T HAVE THEIR DIABETES DETECTED BY AN EYE HEALTH PROFESSIONAL

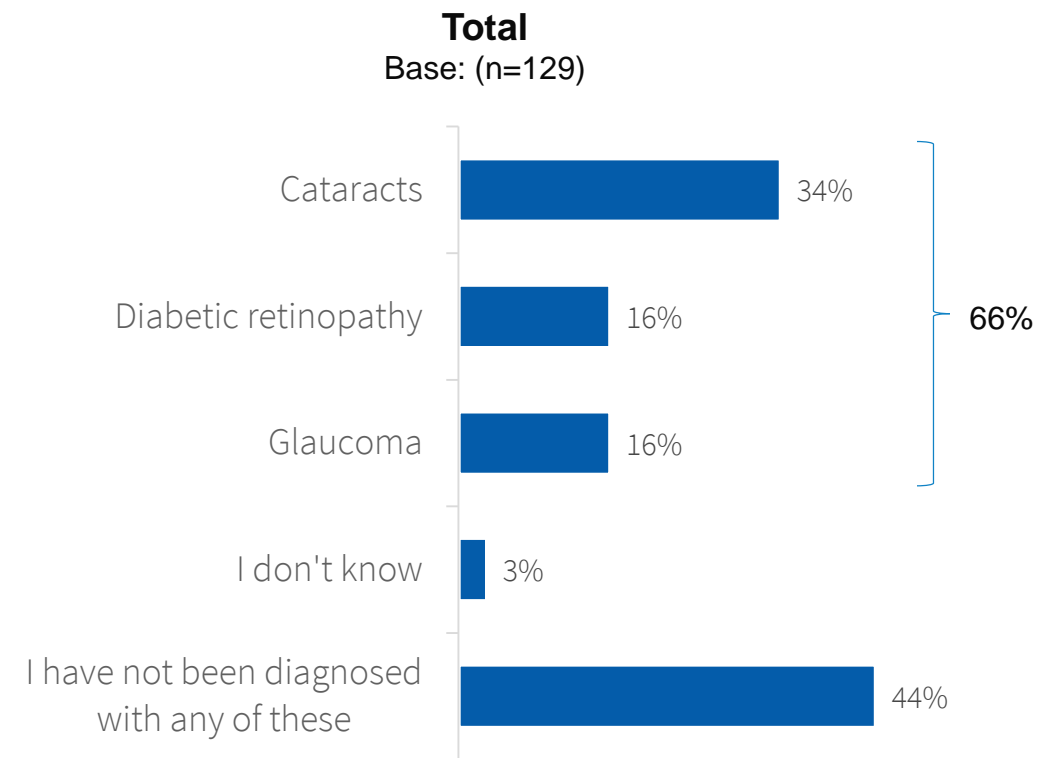
Was your diabetes detected through by an eye health professional?



Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

66% OF AMERICANS WITH DIABETES HAVE BEEN DIAGNOSED WITH DIABETES RELATED EYE COMPLICATIONS BY THEIR EYE DOCTOR.

Have you been diagnosed with any of the following by your eye doctor?



Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.



TRACKING QUESTIONS (SLIDES 7-42)



COMPREHENSIVE EYE EXAM (SLIDES 43-56)



PEDIATRICS (SLIDES 57-80)



DIABETES (SLIDES 81-100)



CONTACT LENSES AND GLASSES (SLIDES 101-135)



ONLINE VISION SCREENING APPS (SLIDES 136-143)



GAMING/SPORTS (SLIDES 144-149)





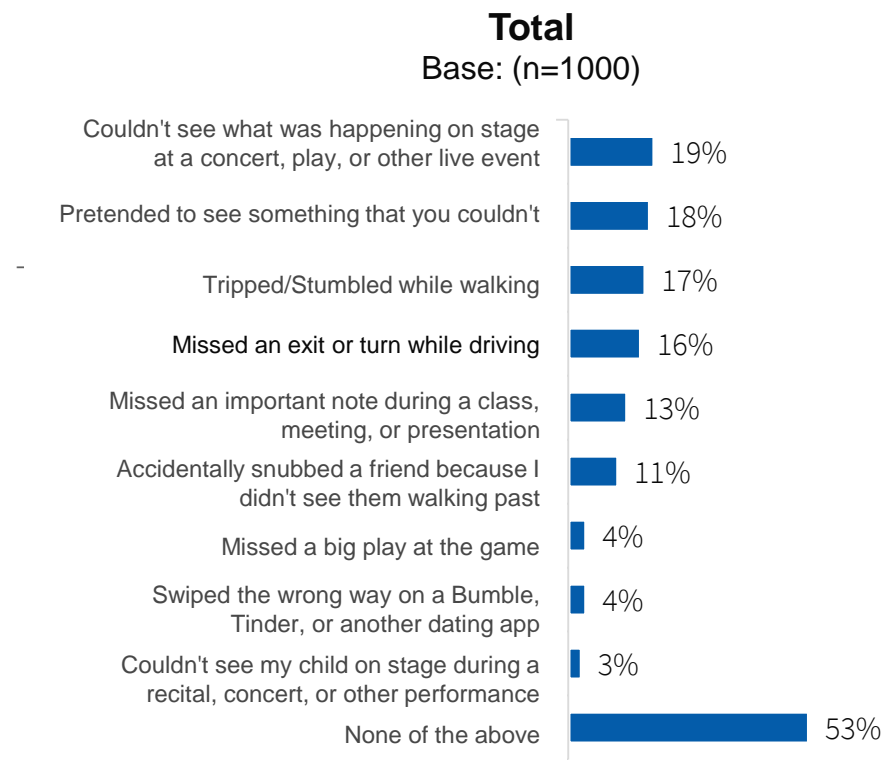
PEOPLE PRIMARILY LOOK TO EYE DOCTORS TO PURCHASE LENSES

While some Americans have purchased corrective eyewear online, the majority choose to purchase them from their eye doctor.

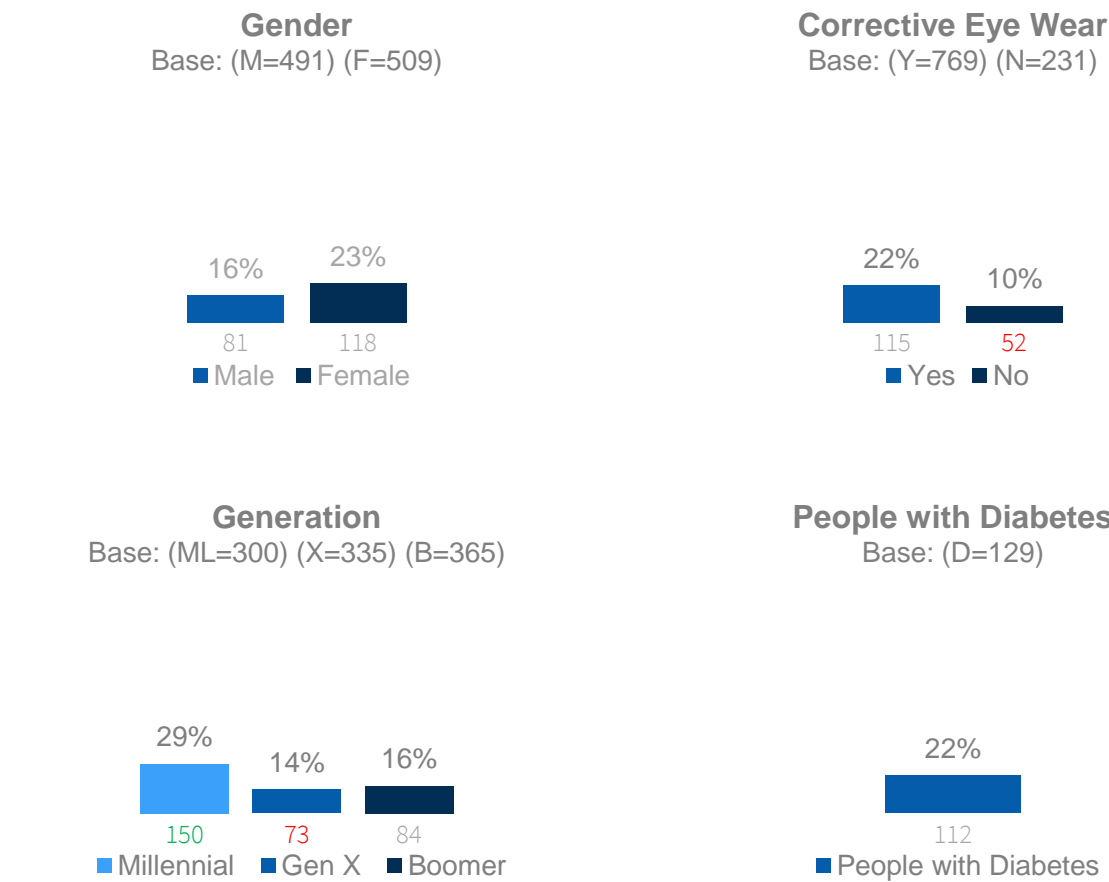
- Nearly all (94%) of people who wear eye glasses or contacts have purchased at least one pair through an eye doctor – and a third (34%) have purchased online before.
- One in three of Americans who purchased contacts online say they've done so with an expired or outdated prescription.
- More than a quarter (27%) of people who have purchased them through an online retailer have experienced an issue with their lenses, with most people saying they received lenses that didn't fit right.

AMERICANS ARE MISSING OUT ON EXPERIENCES DUE TO POOR VISION OR EYE ISSUES.

Have you ever experienced any of the following due to poor vision or another eye issue? *Please select all that apply.*

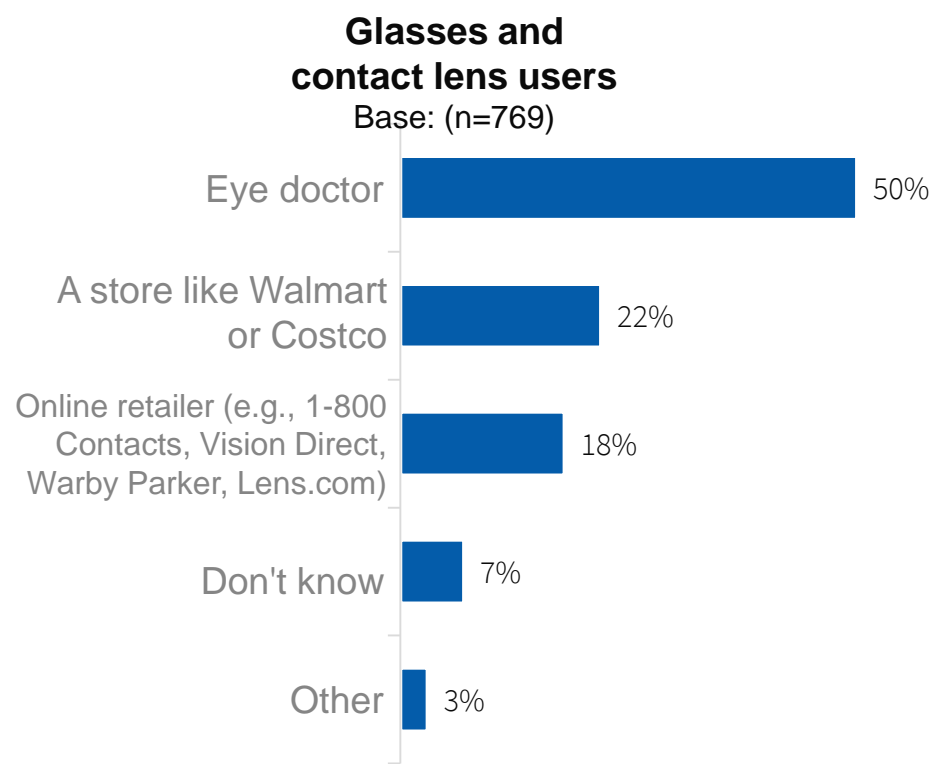


% Couldn't see what was happening on stage at a concert, play, or other live performance

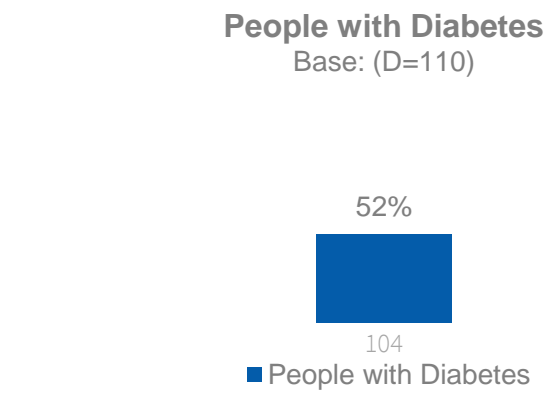
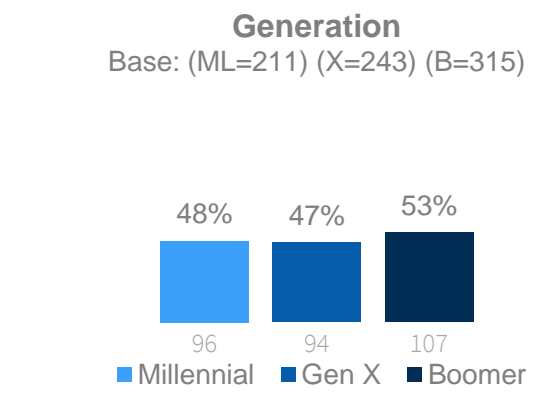
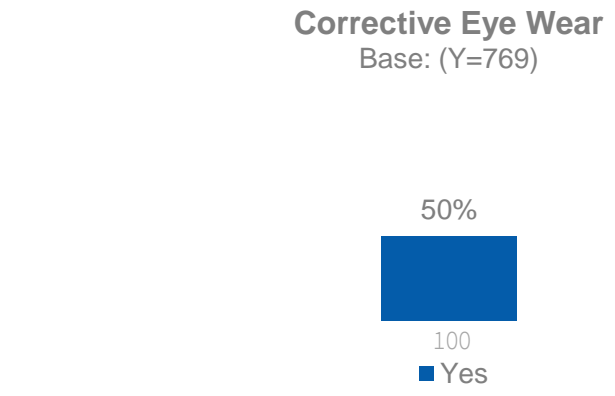
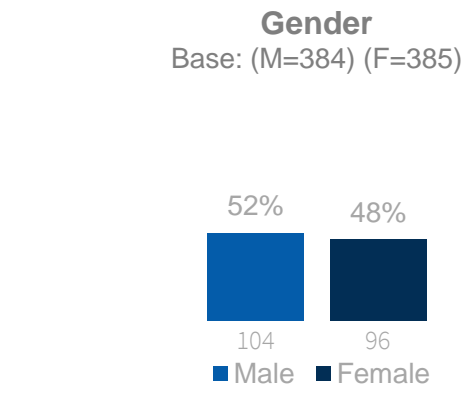


HALF OF GLASSES AND CONTACT LENS USERS ARE MORE LIKELY TO ORDER PRESCRIPTION CORRECTIVE EYEWEAR FROM AN EYE DOCTOR.

Which of the following would you be most likely to order prescription corrective eyewear from in the future?

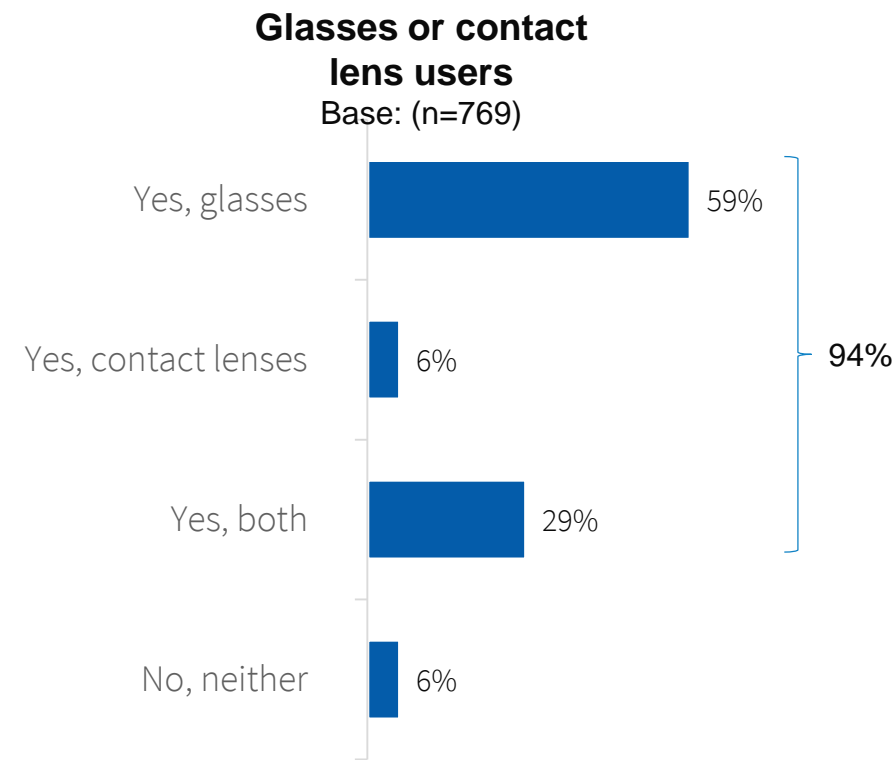


% Eye doctor

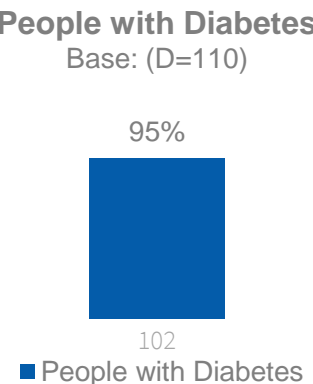
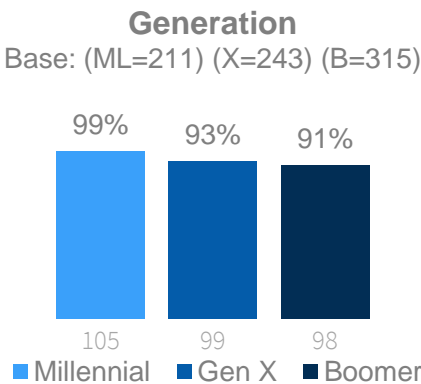
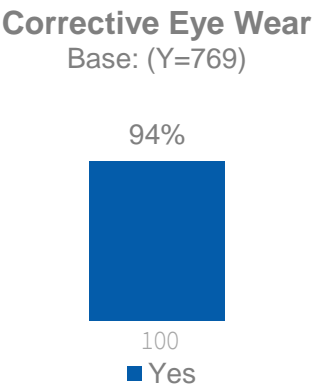
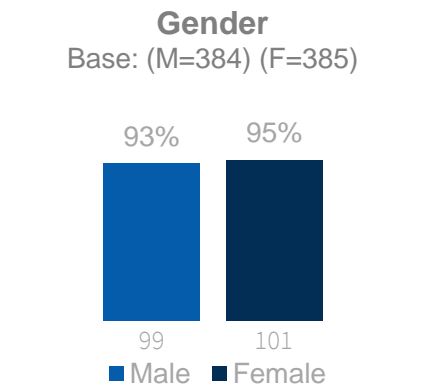


94% OF PEOPLE WHO WEAR GLASSES OR CONTACTS HAVE PURCHASED AT LEAST ONE PAIR THROUGH AN EYE DOCTOR.

Have you ever purchased glasses and/or contact lenses through an eye doctor?

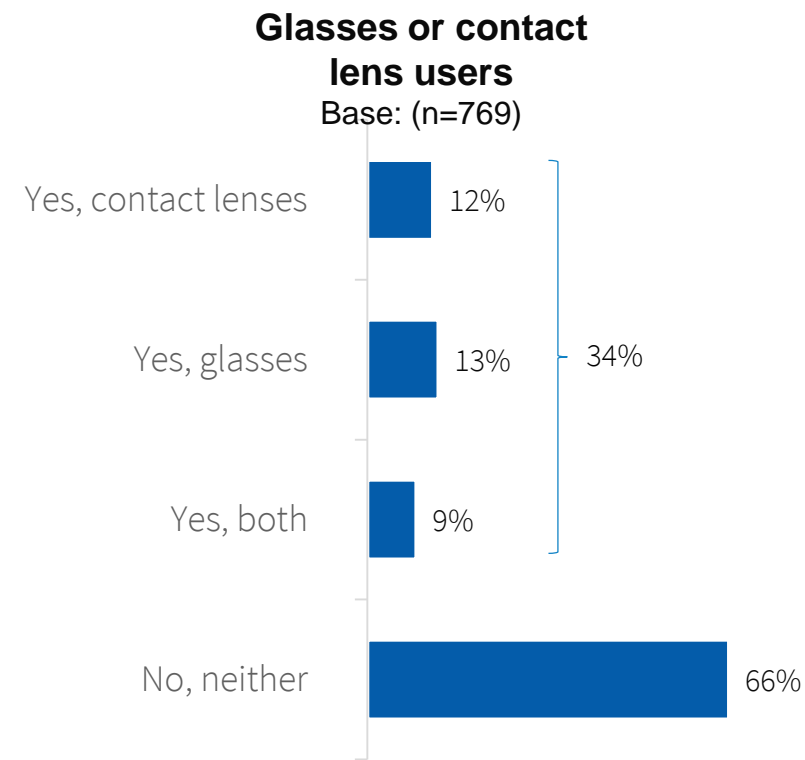


% Purchased glasses and/or contacts through an eye doctor

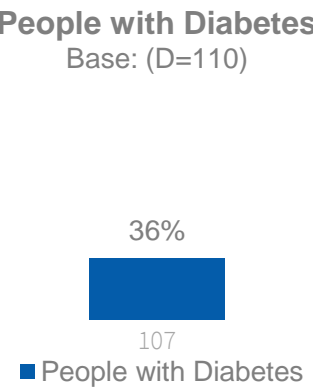
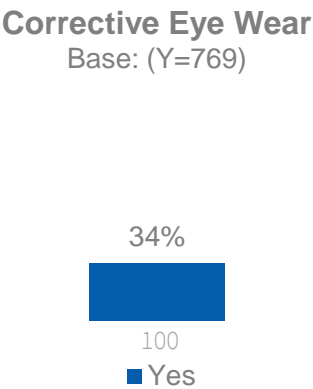
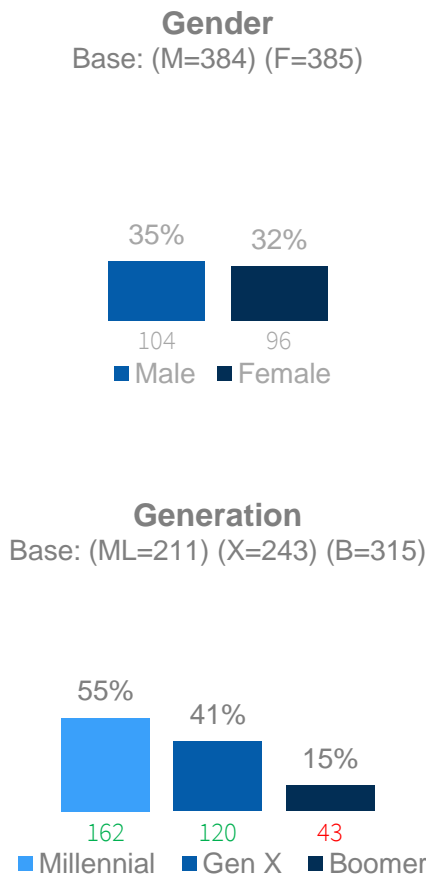


A THIRD OF AMERICANS WHO WEAR GLASSES OR CONTACTS HAVE PURCHASED THEM AT LEAST ONCE ONLINE.

Have you ever ordered glasses and/or contact lenses through an online retailer (e.g., 1-800 Contacts, Vision Direct, Warby Parker, Lens.com)?



% Have purchased glasses and/or contacts online

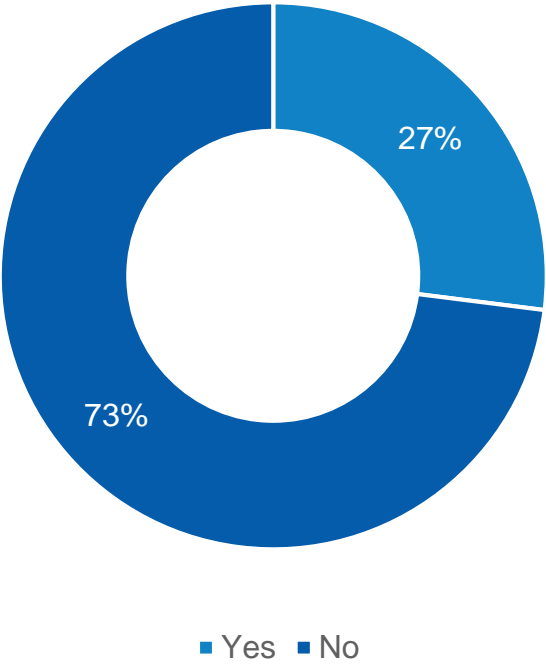


MORE THAN A QUARTER OF PEOPLE WHO ORDERED CONTACT LENSES ONLINE HAVE EXPERIENCED AN ISSUE WITH THE CONTACT LENSES...

Have you ever had an issue with the contact lenses you ordered through an online retailer?

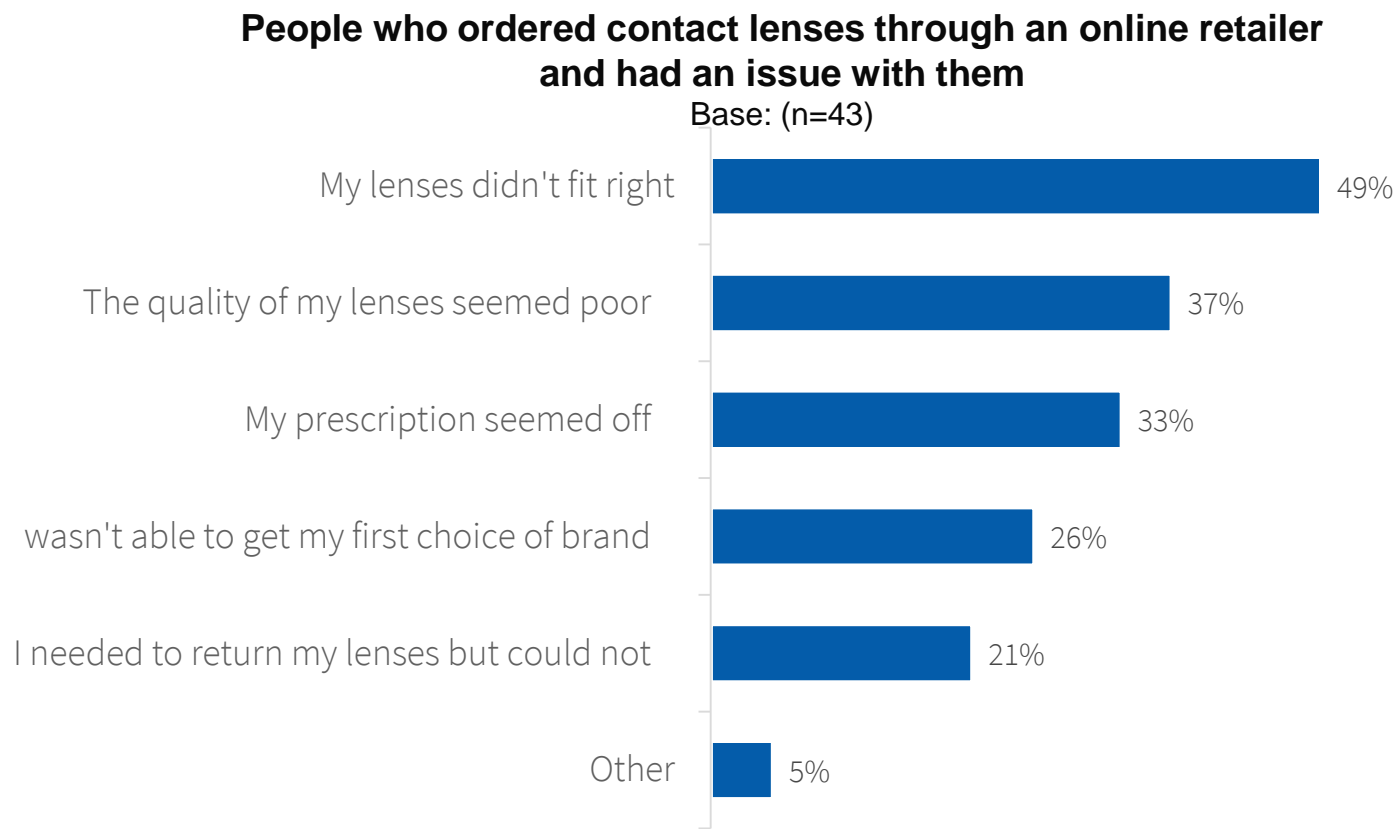
People who ordered contact lenses through an online retailer

Base: (n=162)



AND ALMOST HALF OF THOSE PEOPLE ALSO RECEIVED LENSES THAT DIDN'T FIT.

Which of the following issues did you experience? Please select all that apply.



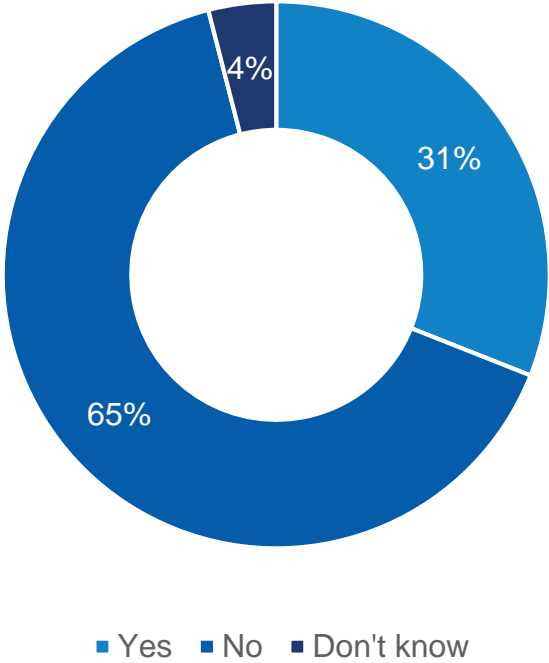
Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

ALMOST ONE IN THREE WHO PURCHASED CONTACTS ONLINE HAVE HAD THEIR CONTACT LENS BRAND SWITCHED.

Have you ever ordered contacts lenses through an online retailer and had your brand switched (able to order a brand that was not prescribed by your doctor)?

People who ordered contact lenses through an online retailer

Base: (n=162)

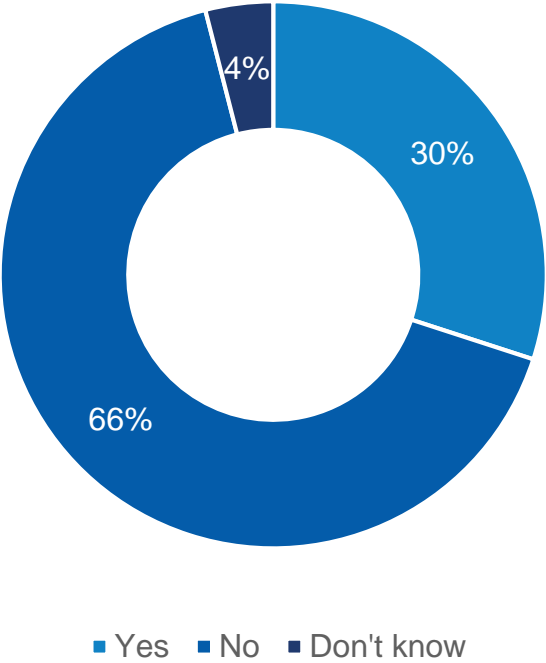


Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

THREE IN TEN PEOPLE WHO HAVE ORDERED CONTACTS ONLINE HAVE DONE SO WITH AN EXPIRED OR OUTDATED PRESCRIPTION.

Have you ever ordered contact lenses through an online retailer despite having an expired or outdated prescription?

People who ordered contact lenses through an online retailer
Base: (n=162)



Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.



MANY CONTACT WEARERS ADMIT TO BAD CONTACT LENS HYGIENE

Glasses and contact lens users prefer to wear contacts over glasses, but under some circumstances, they'll choose to wear glasses instead.

- Over half (58%) wear contacts more frequently than their glasses, and over three-fourths (78%) have had an instance when they wore their glasses instead of their contacts.
- A relaxing night in is the most common reason people wear their glasses instead of their contacts, with a third (33%) saying this was the cause.
- While situational factors play a role in their decision, discomfort such as dry eyes (54%) and itchy eyes (42%) while wearing contacts may also drive them to switch to glasses.

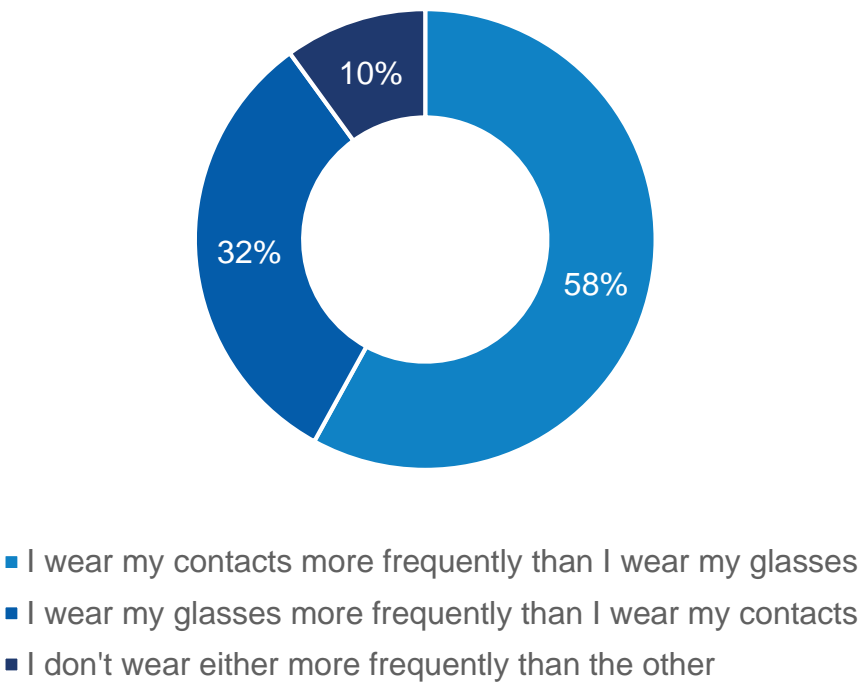
Contact wearers admit to occasionally practicing poor contact lens hygiene.

- In the past year, many have exercised poor contact lens hygiene, with two in five (41%) saying they've slept while wearing their contact lenses and 37% admitting to wearing the same pair longer than recommended.
- One in ten have used something other than their contact lens holder to store their contacts, with people saying they've used a cup, shot glasses, and other unique items.

OVER HALF OF CONTACT LENS AND GLASSES USERS WEAR CONTACTS MORE FREQUENTLY THAN GLASSES...

Which of the following best describes your contact lens and glasses wearing habits?

Glasses and contact lens users
Base: (n=179)



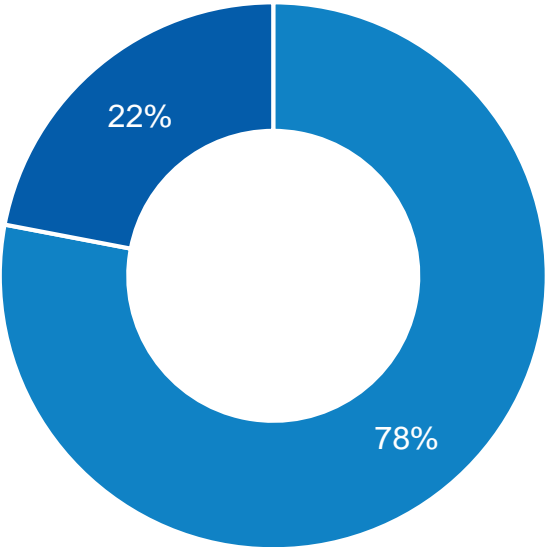
Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

AND ONE IN FIVE OF THESE PEOPLE HAVE HAD AN INSTANCE WHEN THEY WORE THEIR GLASSES INSTEAD OF THEIR CONTACTS.

You said you wear your contacts more frequently than you wear your glasses. In the past year, has there been an instance when you wore your glasses instead of your contacts?

Contact lens users who wear contacts more frequently than glasses

Base: (n=103)



■ Yes ■ No

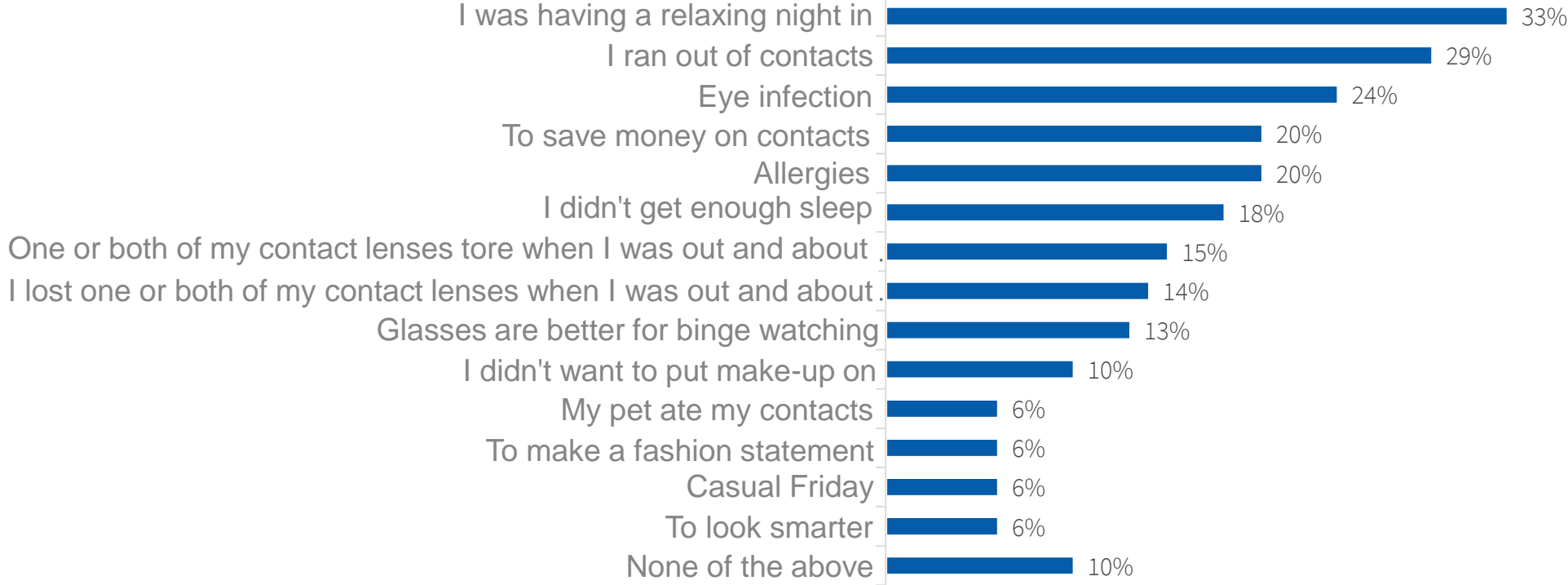
Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

A RELAXING NIGHT IN IS THE MOST COMMON REASON PEOPLE WEAR THEIR GLASSES INSTEAD OF CONTACTS.

What caused you to wear your glasses instead of your contacts? Please select all that apply.

Contact lens users who wear contacts more frequently than glasses but chose to wear glasses instead of contacts once in the past year

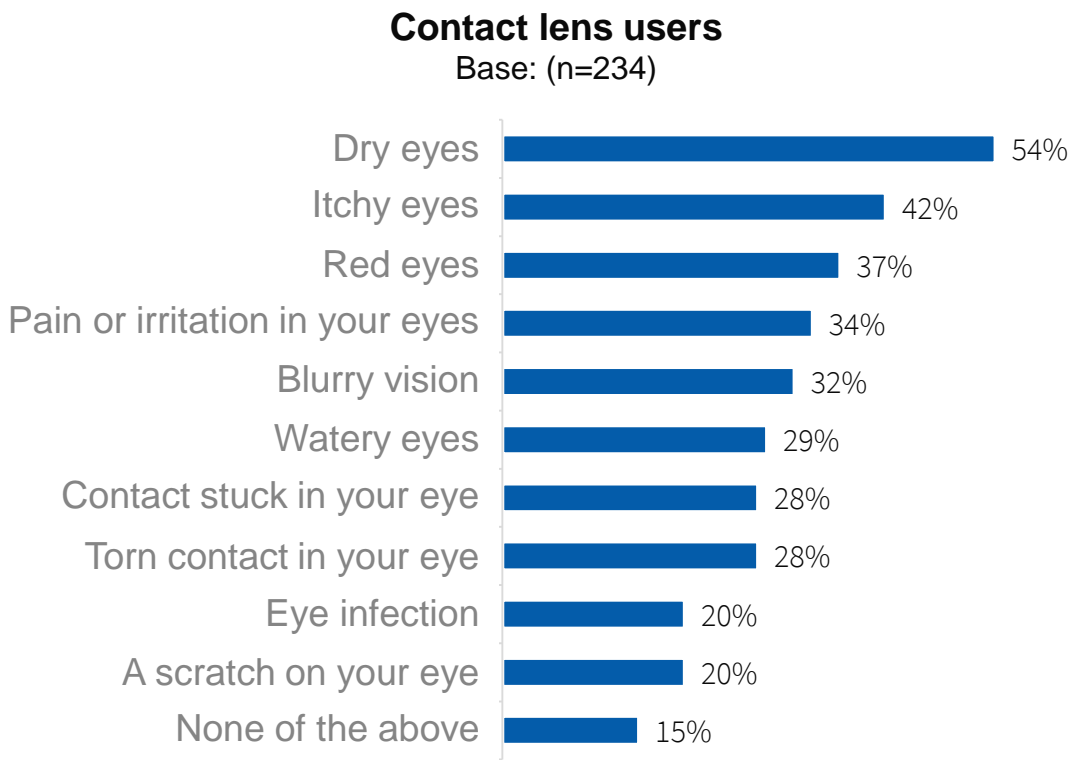
Base: (n=80)



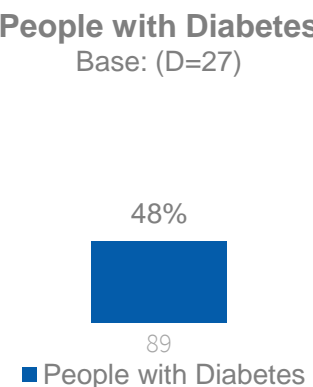
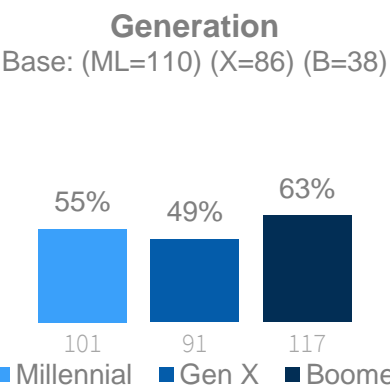
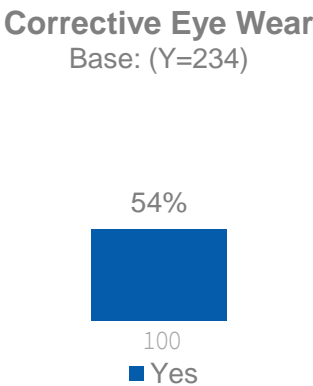
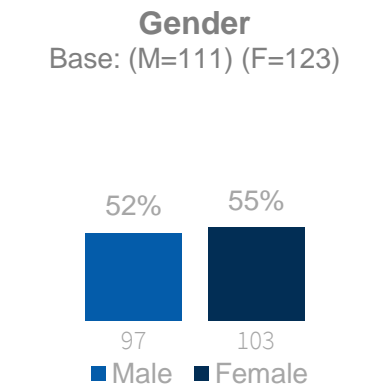
Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

THE MOST COMMON SIGNS OF DISCOMFORT EXPERIENCED BY CONTACT LENS USERS ARE DRY EYES AND ITCHY EYES.

Have you ever experienced the following from wearing contacts?

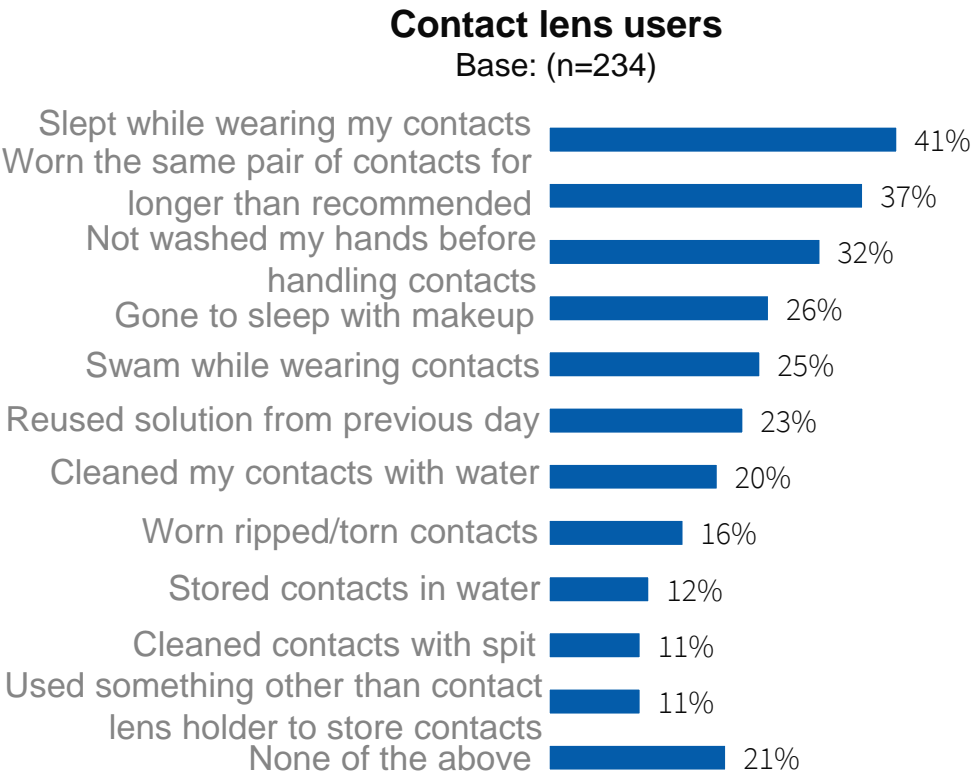


% Dry eyes

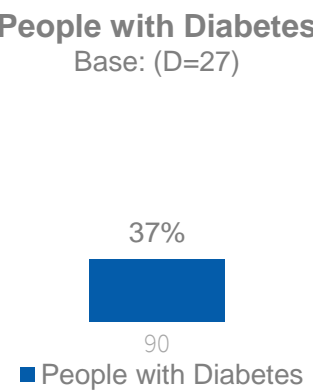
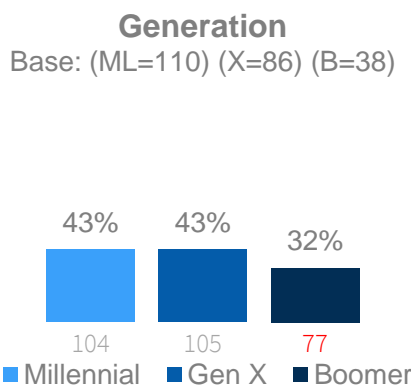
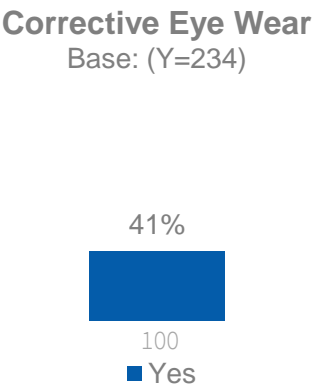
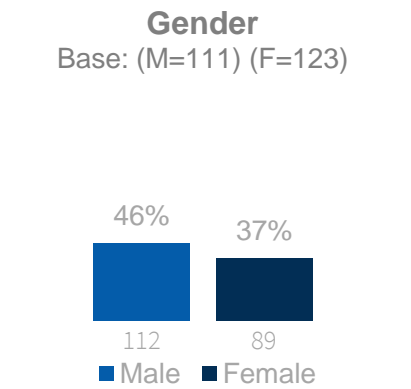


TWO IN FIVE CONTACT LENS USERS HAVE SLEPT IN THEIR CONTACT LENSES IN THE PAST YEAR, AND OTHER BAD HABITS PERSIST

Which of the following have you done in the past year?



% Slept while wearing my contacts



EXAMPLES OF ALTERNATIVE PLACES AMERICANS HAVE STORED THEIR CONTACTS IN OVERNIGHT.

You mentioned that you've used something other than a contact lens holder to store your contacts overnight in the past year. Where's the funniest place you've stored them?

HOTEL GLASSES COFFEE CUP

PLASTIC BAG PILL BOTTLE

TUPPERWARE CONTAINER SOUP BOWLS

SHOT GLASSES KITCHEN SINK

WATER BOTTLE CAPS CUPS

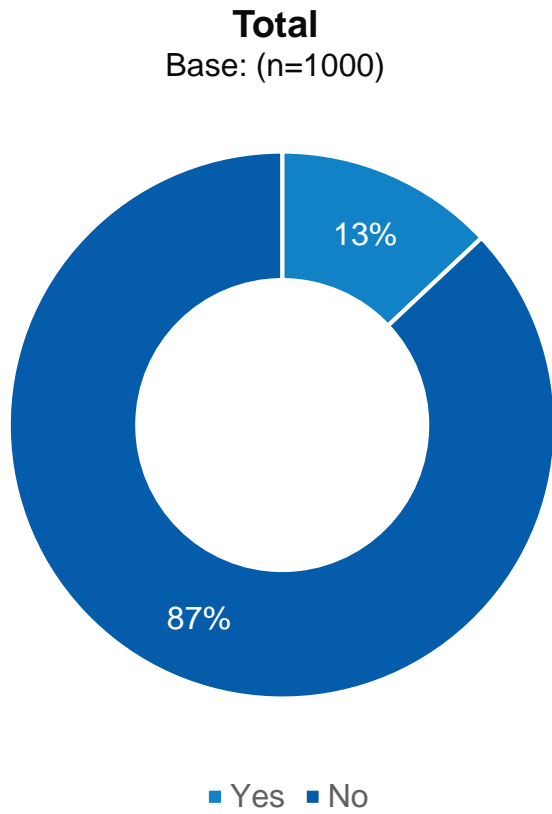
"A shot glass. what makes it funny is that someone else drank them."

"In glasses I labeled left and right."

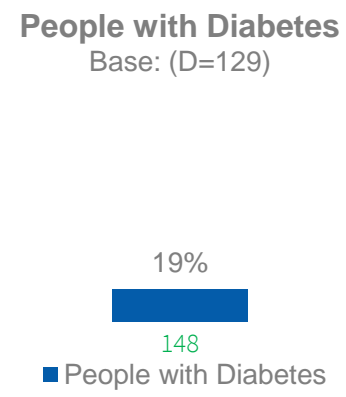
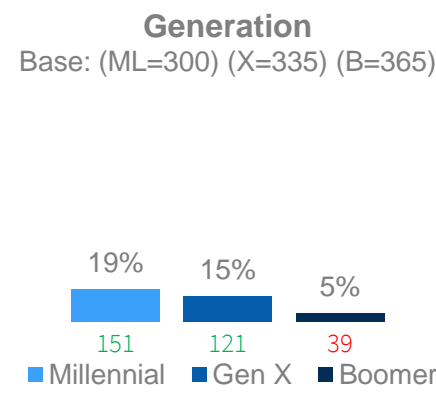
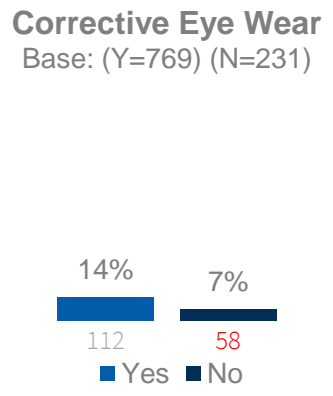
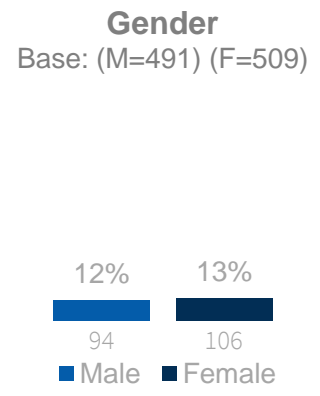
Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.

ONE IN TEN AMERICANS HAVE WORN DECORATIVE/COLORED CONTACT LENSES.

Have you ever worn decorative/colored contact lenses?

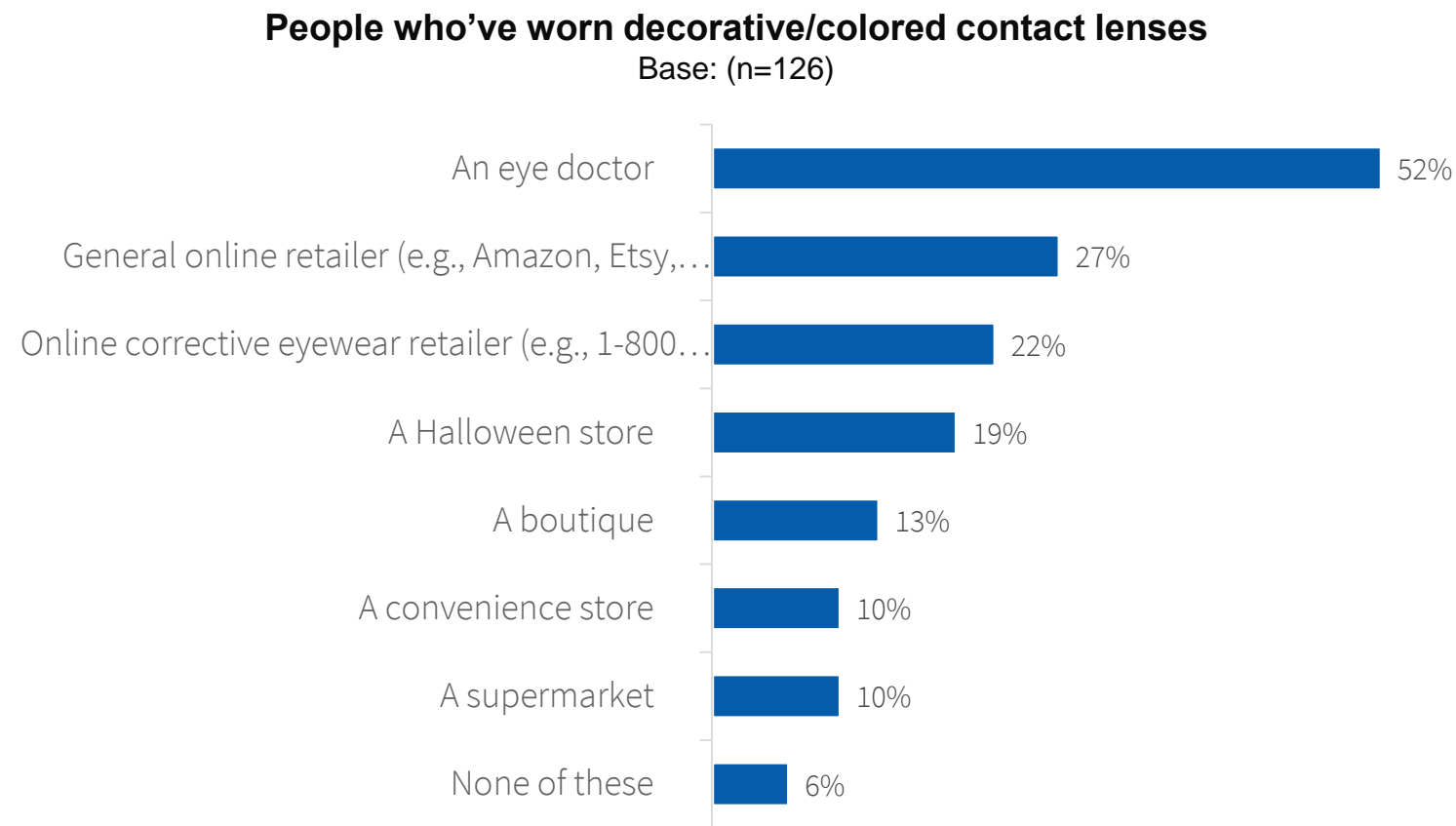


% Yes



ONLY HALF OF PEOPLE WHO HAVE WORN DECORATIVE/COLORED CONTACTS PURCHASED THEM FROM AN EYE DOCTOR.

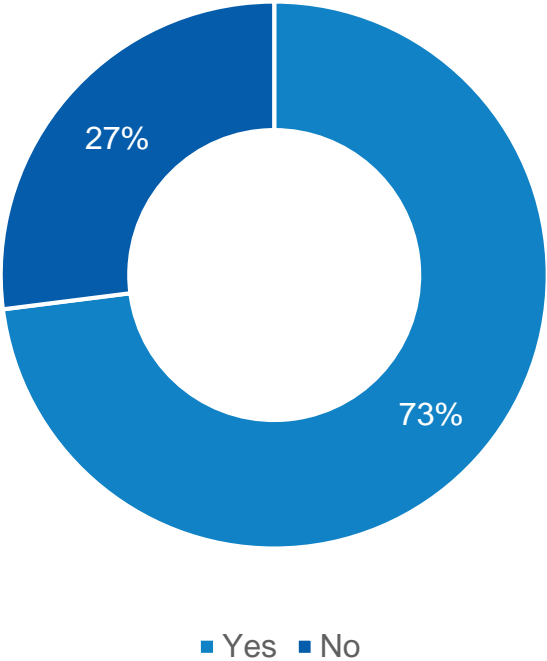
Which of the following best describe where you've purchased decorative/colored contact lenses? Please select all that apply.



ONE IN FOUR AMERICANS WHO HAVE PURCHASED DECORATIVE LENSES DID NOT HAVE A PRESCRIPTION FROM AN EYE DOCTOR.

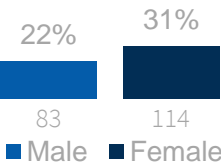
Did you have a prescription from an eye doctor when purchasing your decorative/colored contacts?

People who've worn decorative/colored contact lenses
Base: (n=126)

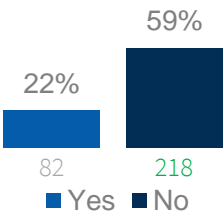


% No

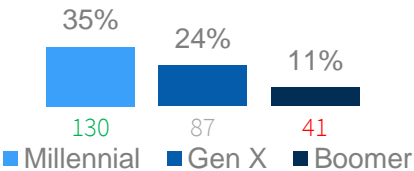
Gender
Base: (M=58) (F=68)



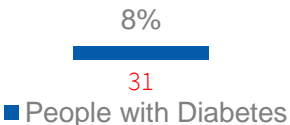
Corrective Eye Wear
Base: (Y=109) (N=17)



Generation
Base: (ML=57) (X=51) (B=18)



People with Diabetes
Base: (D=24)





AWARENESS OF HARMFUL SUN DAMAGE DOESN'T ALWAYS AFFECT SUNGLASS USAGE

Most Americans own sunglasses, but not all check the UV ray protection before buying.

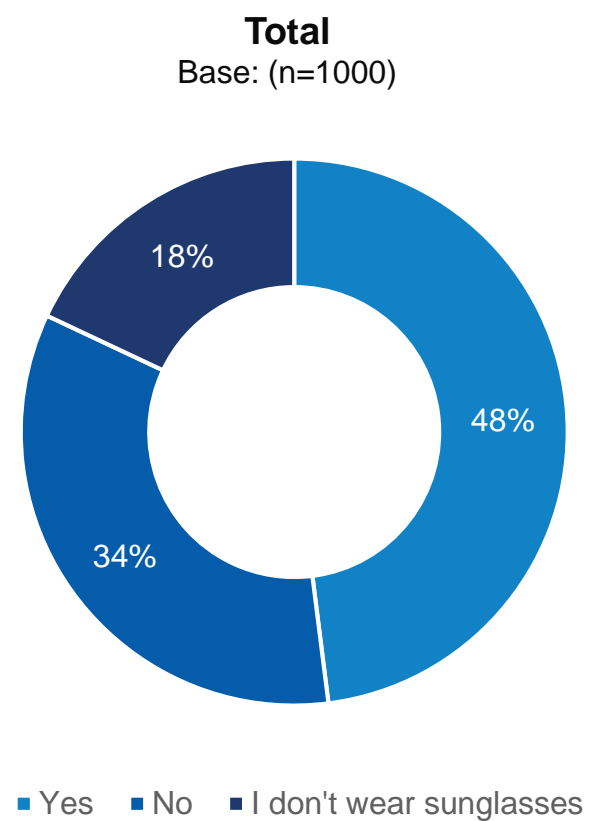
- Four in five Americans (82%) have purchased sunglasses.
- However, only half (48%) of these people check the UV ray protection level before purchasing and only half (48%) wear sunglasses primarily to protect their eyes from sun damage.

Most Americans are aware that harmful UV radiation is present during all seasons and types of weather, but not all are wearing sunglasses to protect their eyes.

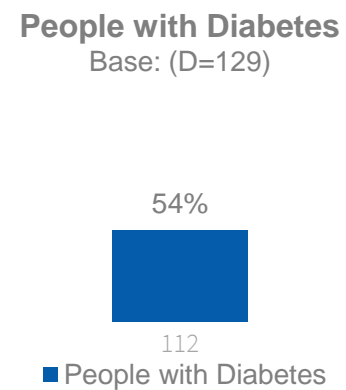
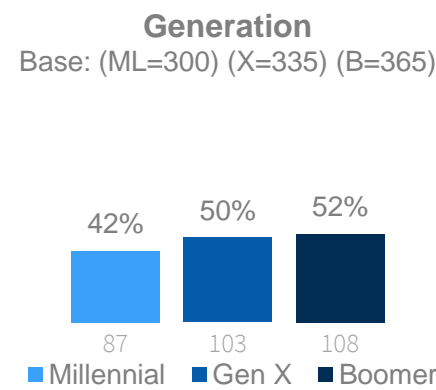
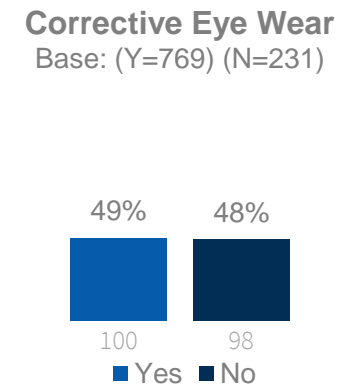
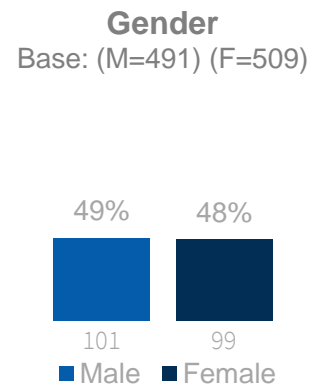
- As expected, most sunglass wearers regularly wear sunglasses in the summer (88%) and 89% of sunglasses wearers who have been to a beach wear them while they're there.
- While 84% know that harmful UV radiation is present even on gloomy, cloudy days, less than a third (28%) of sunglass wearers who have experienced gloomy, cloudy weather regularly wear sunglasses on those days.
- Three in four (74%) know that snow and ice reflect UV rays more than most natural substances on earth. But that doesn't stop over a third (34%) of sunglass wearers who have been skiing, snowboarding, or hiking in the snow from rarely or never wearing sunglasses while doing these activities.
- On top of that, more than half (57%) know that UV radiation is more intense at higher altitudes.

LESS THAN HALF OF AMERICANS CHECK THE UV RAY PROTECTION LEVEL BEFORE PURCHASING SUNGLASSES.

When you buy sunglasses, do you check the ultraviolet/UV ray protection level before you purchase sunglasses?

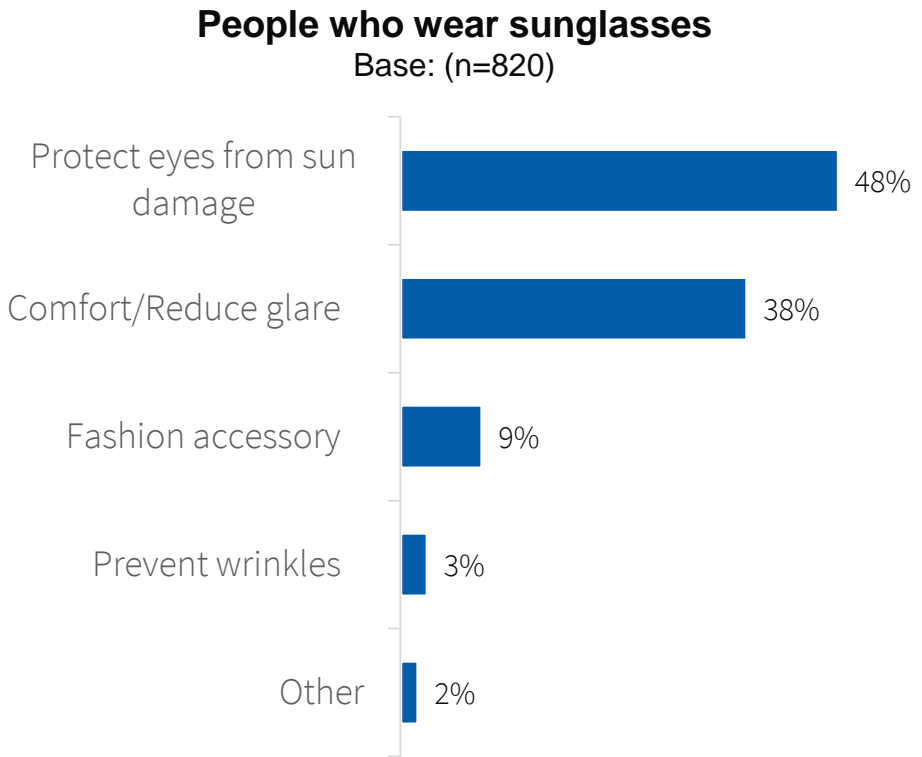


% Yes

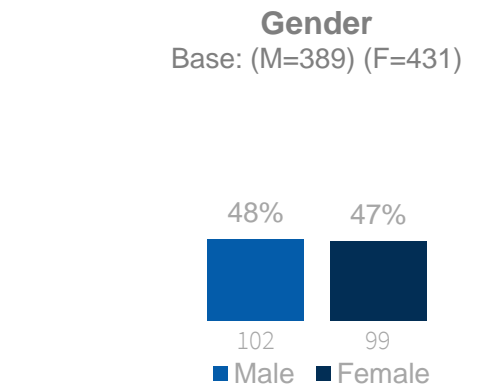


PROTECTING THE EYES FROM SUN DAMAGE IS THE MAIN REASON HALF OF AMERICANS WEAR SUNGLASSES.

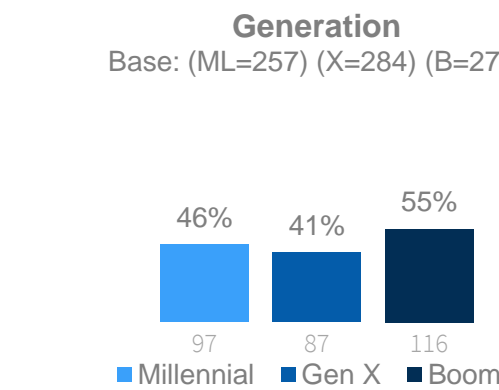
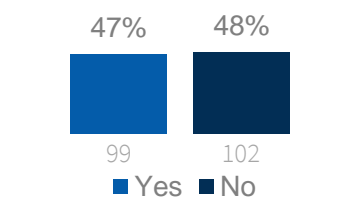
What is the primary reason you wear sunglasses?



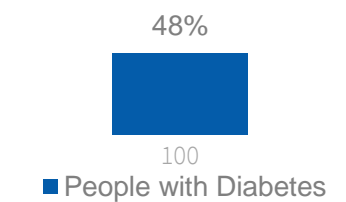
% Protect eyes from sun damage



Corrective Eye Wear
Base: (Y=622) (N=198)

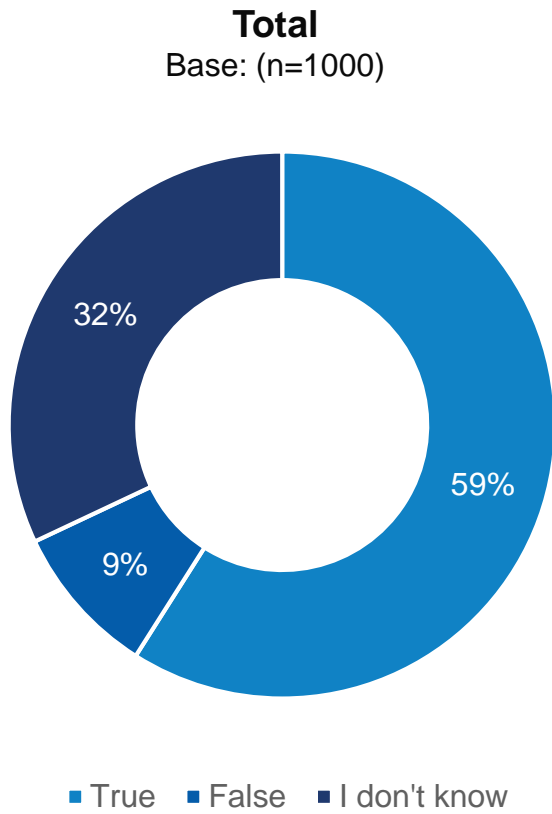


People with Diabetes
Base: (D=105)

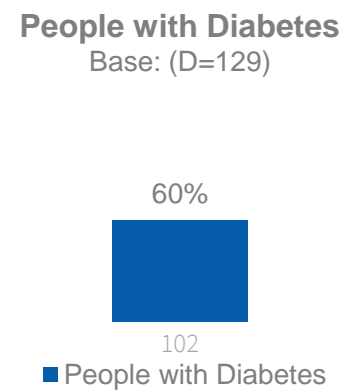
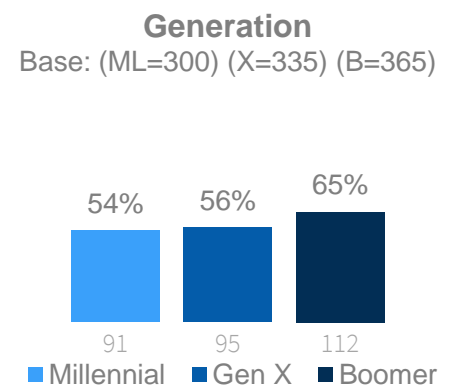
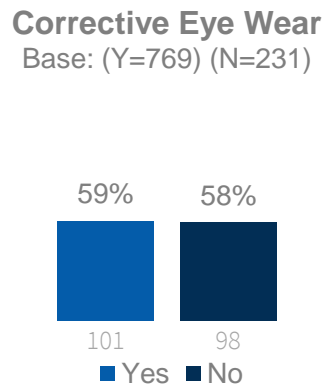
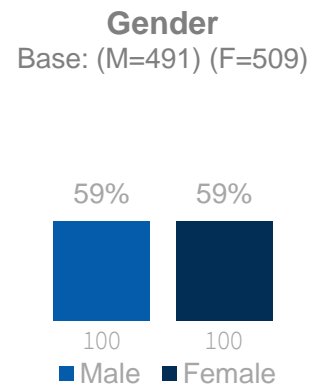


NEARLY THREE IN FIVE AMERICANS KNOW THEY CAN GET A SUNBURN ON THEIR EYES.

“You can get a sunburn on your eyes.” Please indicate whether this statement is true or false.



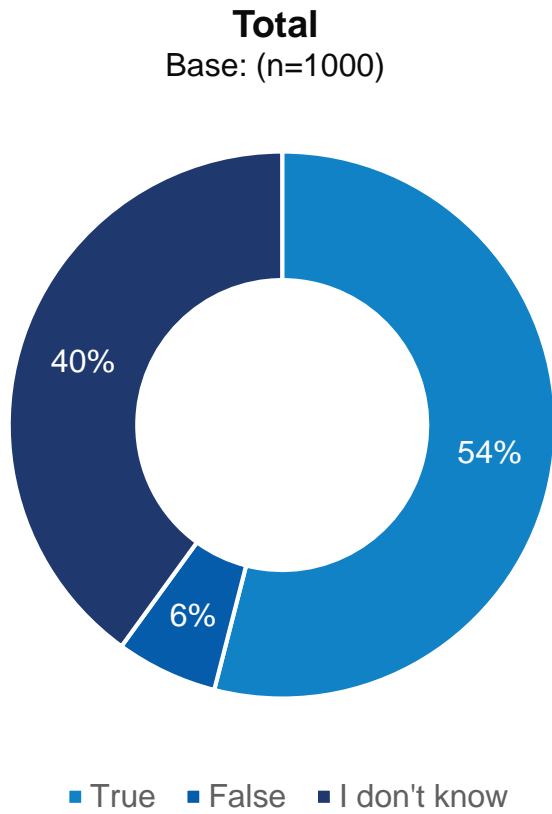
% True



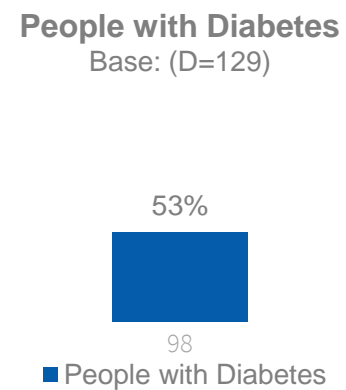
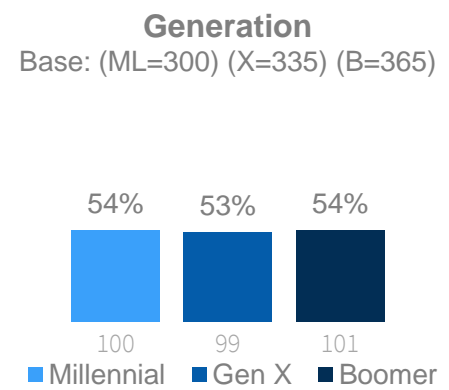
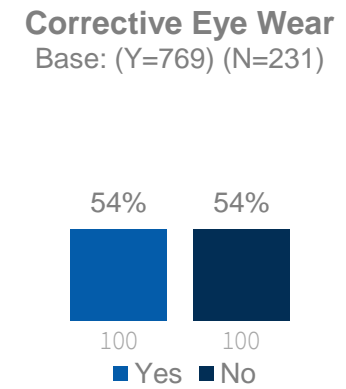
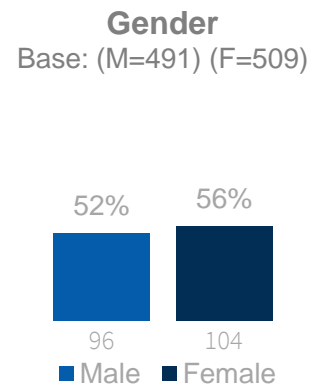
Q53. Below is a series of statements about ultraviolet (UV) rays. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." *You can get a sunburn on your eyes.*

MORE THAN HALF OF AMERICANS KNOW THEY CAN HAVE MELANOMA ON THE EYE.

“You can have melanoma on your eye.” Please indicate whether this statement is true or false.



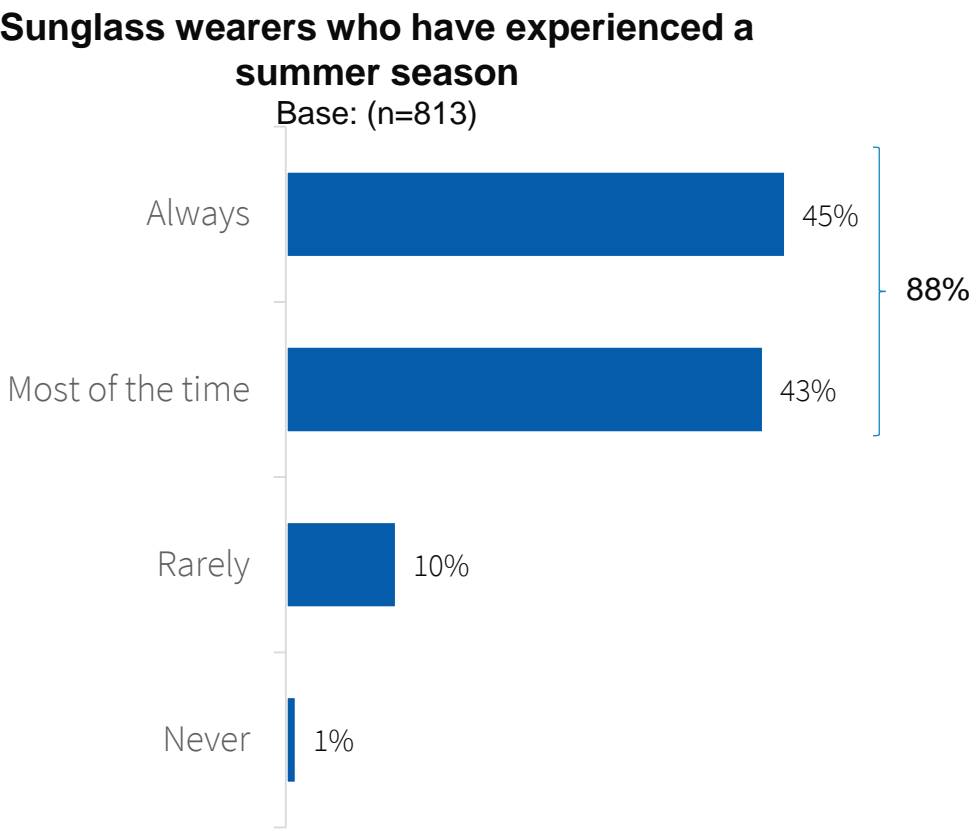
% True



Q53. Below is a series of statements about ultraviolet (UV) rays. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." *You can have melanoma on your eye.*

88% OF SUNGLASS WEARERS WHO HAVE EXPERIENCED A SUMMER SEASON WEAR SUNGLASSES IN THE SUMMER...

Thinking about how often you wear sunglasses, how often do you wear them in the summer?

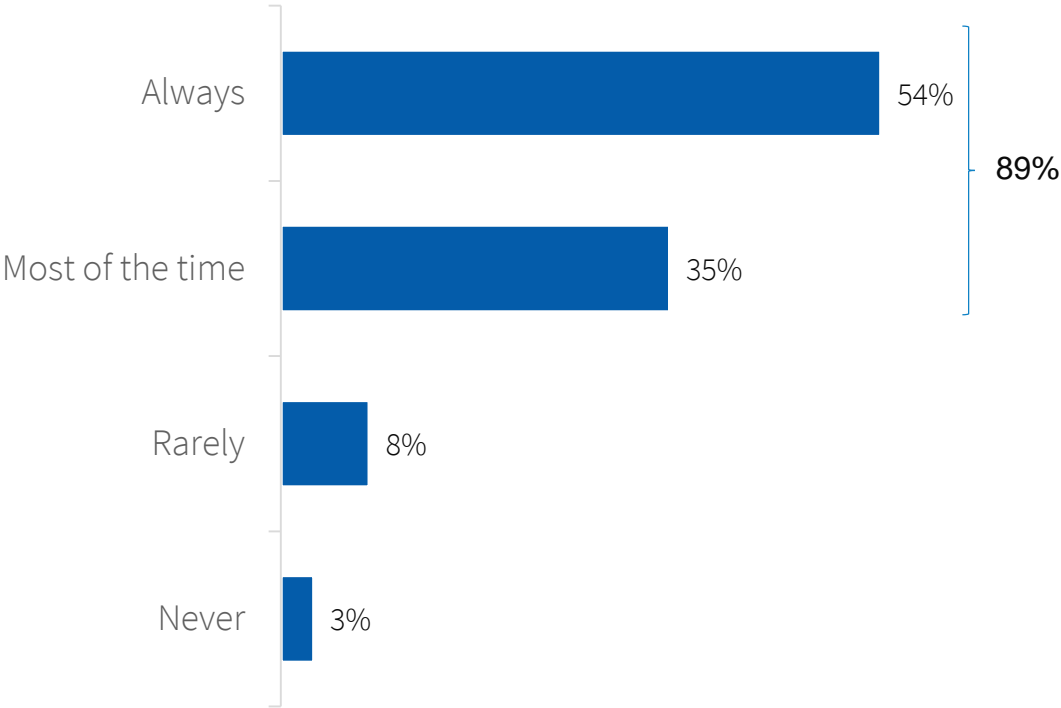


AND NINE IN TEN SUNGLASS WEARERS WHO HAVE BEEN TO THE BEACH WEAR SUNGLASSES WHILE THEY'RE THERE.

Thinking about how often you wear sunglasses, how often do you wear them while at the beach?

Sunglass wearers who have been to a beach

Base: (n=743)

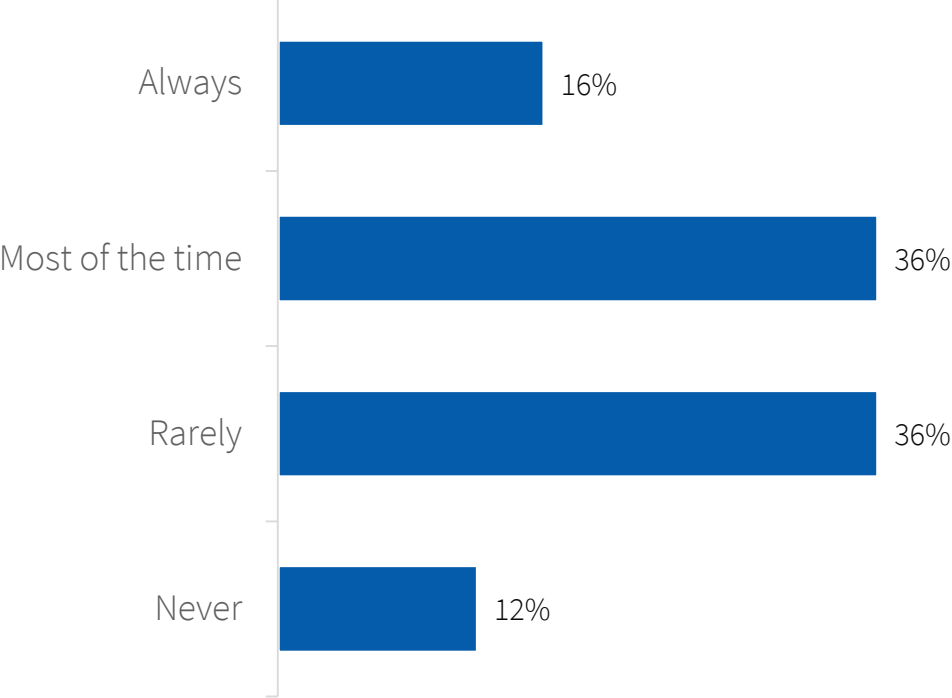


HALF OF SUNGLASS WEARERS WHO HAVE EXPERIENCED A WINTER SEASON RARELY OR NEVER WEAR SUNGLASSES IN THE WINTER.

Thinking about how often you wear sunglasses, how often do you wear them in the winter?

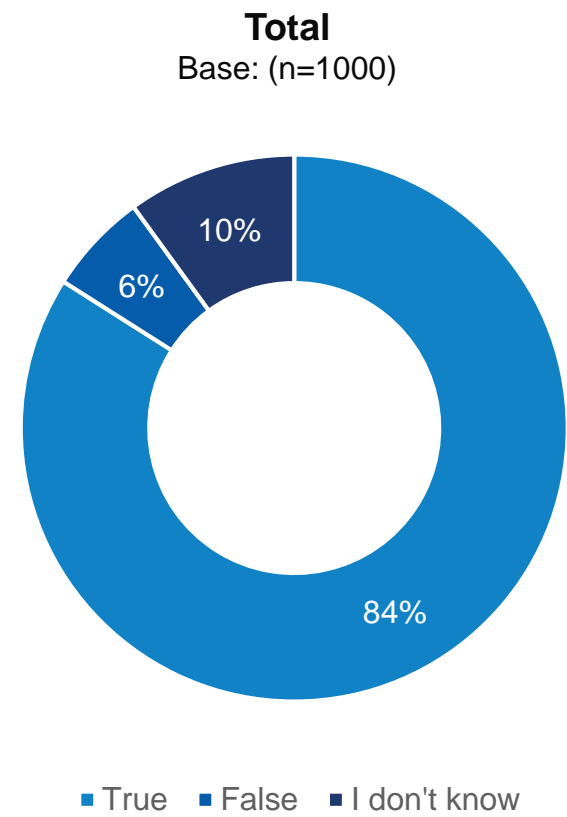
Sunglass wearers who have experienced a winter season

Base: (n=796)

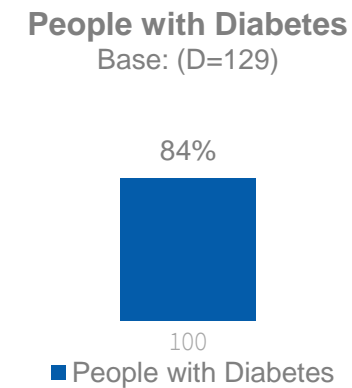
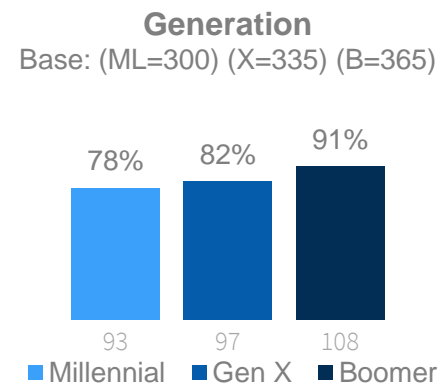
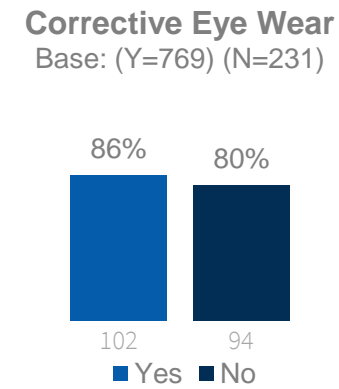
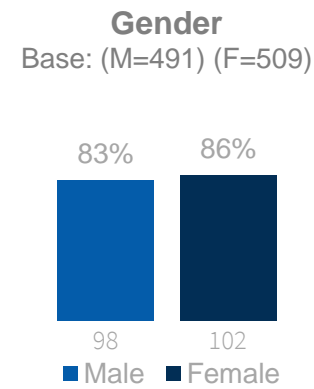


WHILE 84% OF AMERICANS KNOW THAT HARMFUL UV RADIATION IS PRESENT EVEN ON GLOOMY, CLOUDY DAYS...

“Harmful UV radiation is present even on a gloomy, cloudy day.”
Please indicate whether this statement is true or false.



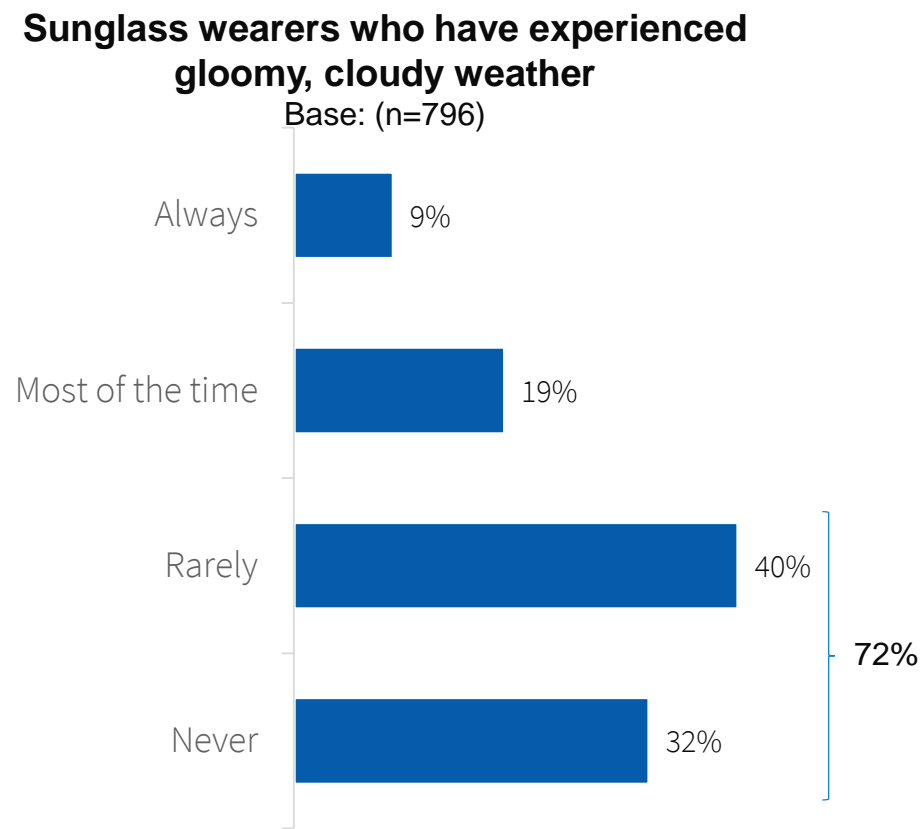
% True



Q53. Below is a series of statements about ultraviolet (UV) rays. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." Harmful UV radiation is present even on a gloomy, cloudy day.

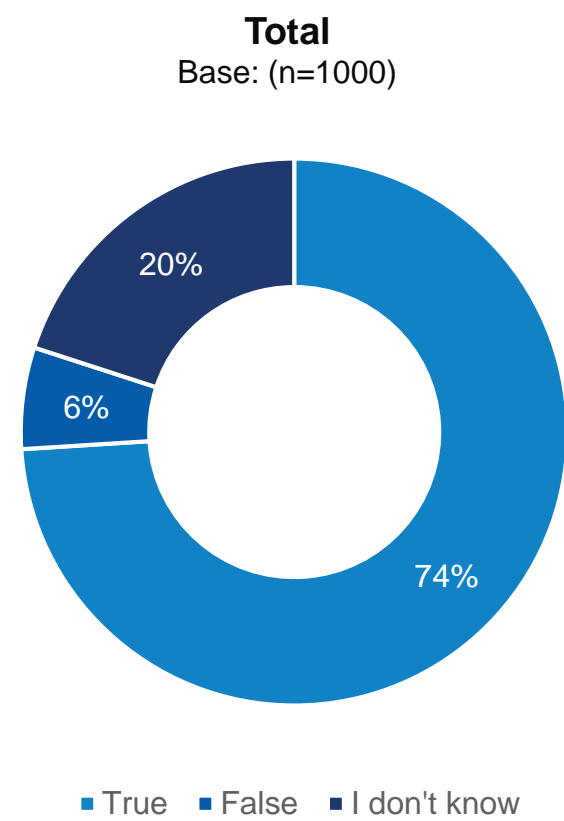
MOST SUNGLASS WEARERS WHO HAVE EXPERIENCED GLOOMY, CLOUDY DAYS DO NOT WEAR SUNGLASSES DURING THOSE DAYS.

Thinking about how often you wear sunglasses, how often do you wear them on a gloomy, cloudy day?

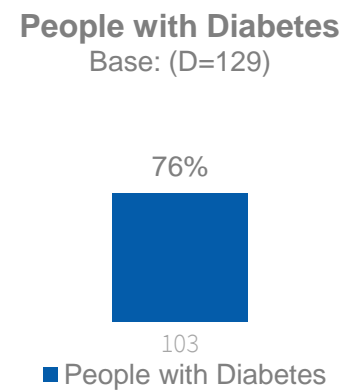
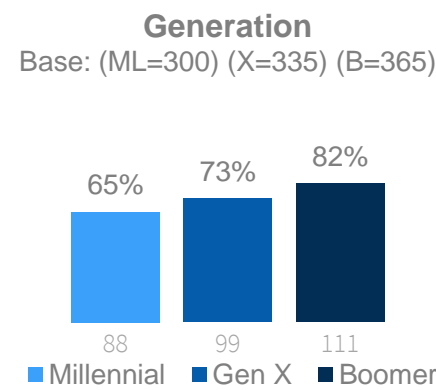
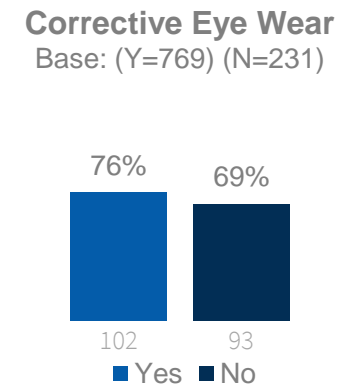
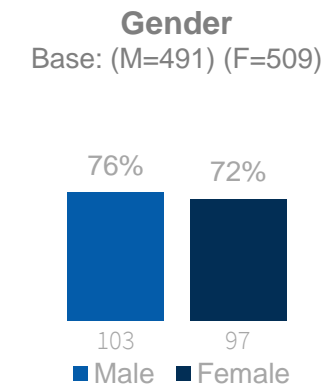


THREE IN FOUR AMERICANS KNOW THAT SNOW AND ICE REFLECT UV RAYS MORE THAN MOST NATURAL SUBSTANCES ON EARTH.

“Snow and ice reflect UV rays more than most natural substances on Earth.” Please indicate whether this statement is true or false.



% True



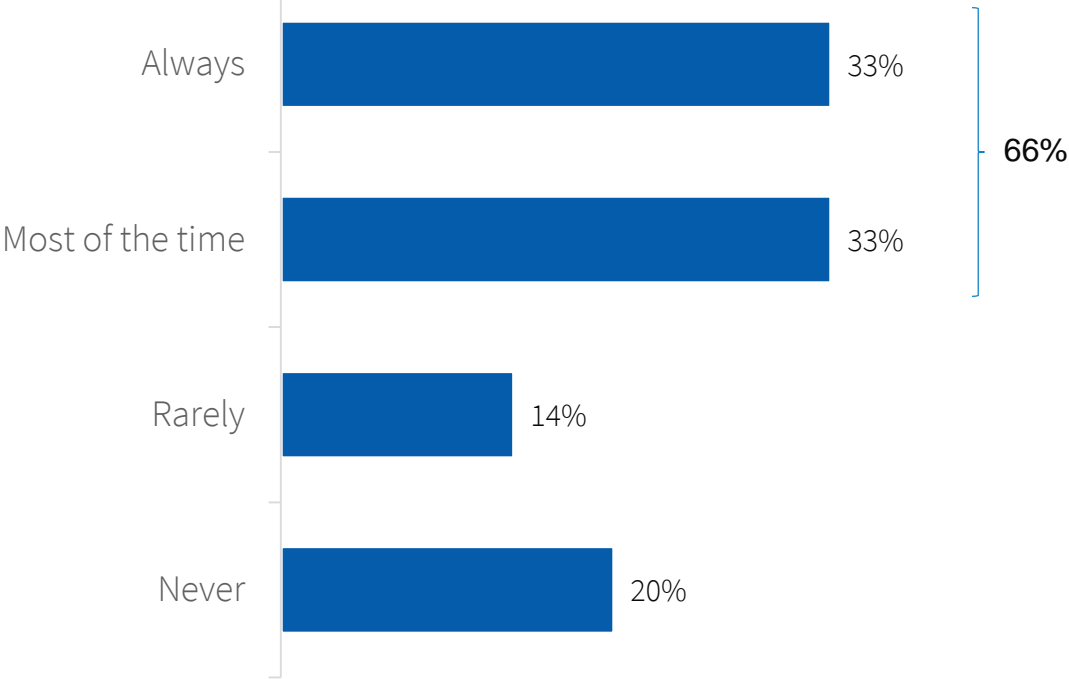
Q53. Below is a series of statements about ultraviolet (UV) rays. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." *Snow and ice reflect UV rays more than most natural substances on Earth.*

TWO THIRDS OF SUNGLASS WEARERS WHO HAVE PARTICIPATED IN SNOW ACTIVITIES WEAR SUNGLASSES WHILE DOING THEM.

Thinking about how often you wear sunglasses, how often do you wear them while skiing, snowboarding, or hiking in the snow?

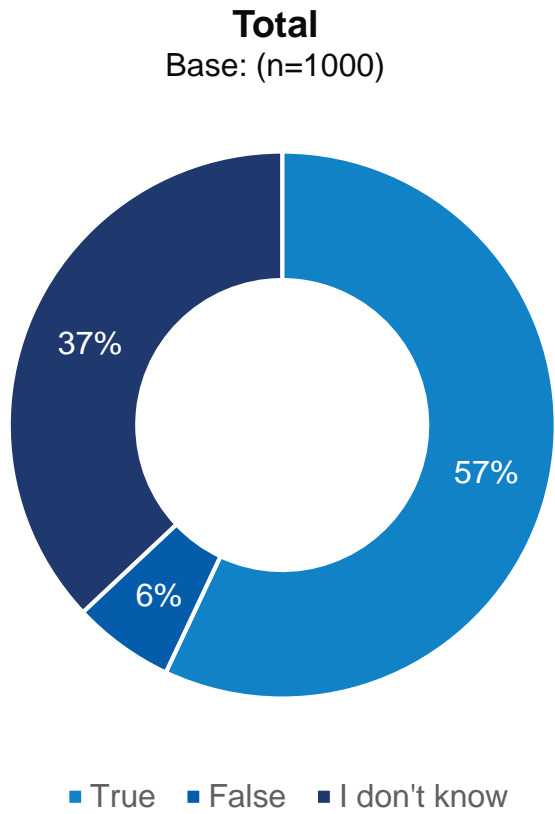
Sunglass wearers who have been skiing, snowboarding, or hiking in the snow

Base: (n=447)



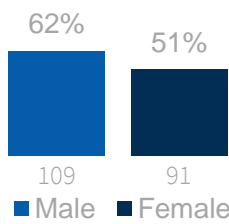
OVER HALF OF AMERICANS KNOW THAT UV RADIATION IS MORE INTENSE AT HIGHER ALTITUDES.

“UV radiation is more intense at higher altitudes.” Please indicate whether this statement is true or false.

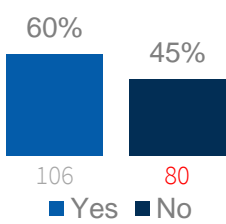


% True

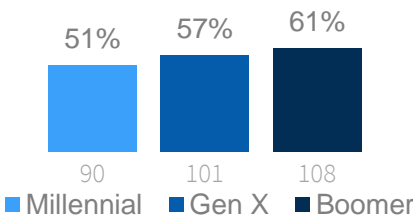
Gender
Base: (M=491) (F=509)



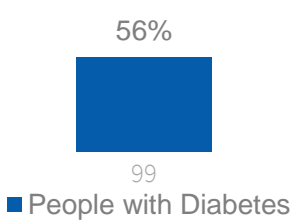
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



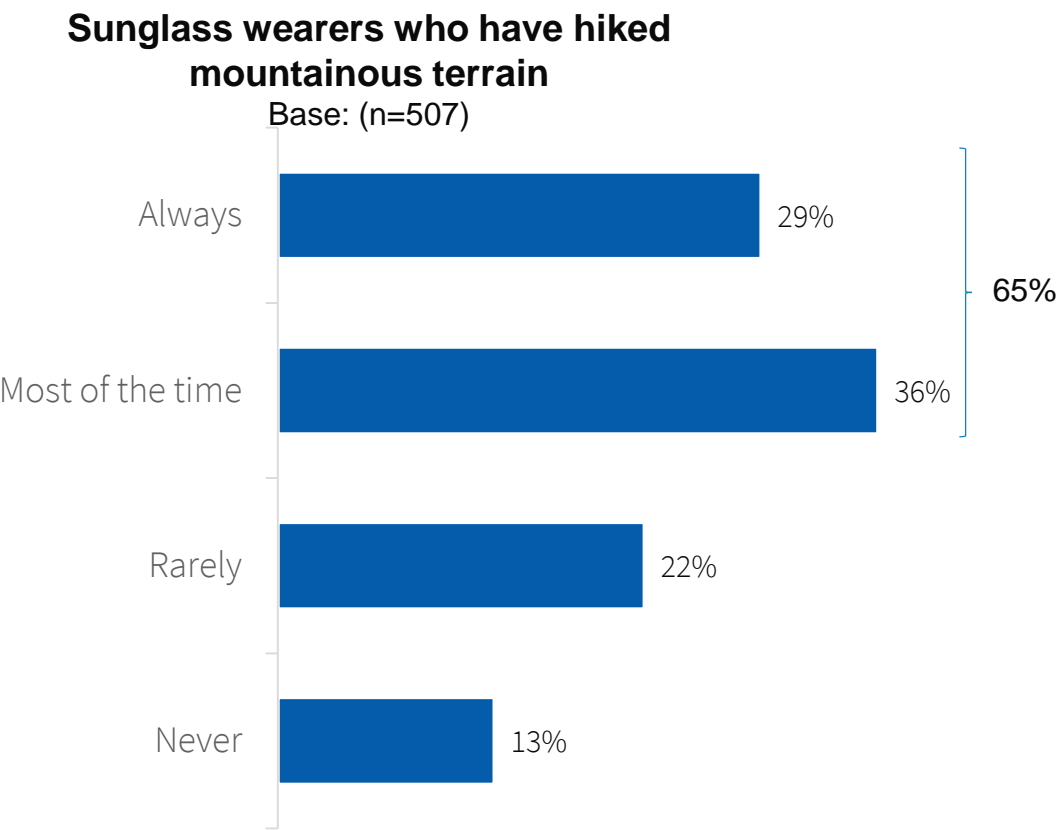
People with Diabetes
Base: (D=129)



Q53. Below is a series of statements about ultraviolet (UV) rays. Please indicate whether each of the following is true or false. If you aren't sure whether a statement is true or false, please select "Don't know." *UV radiation is more intense at higher altitudes.*

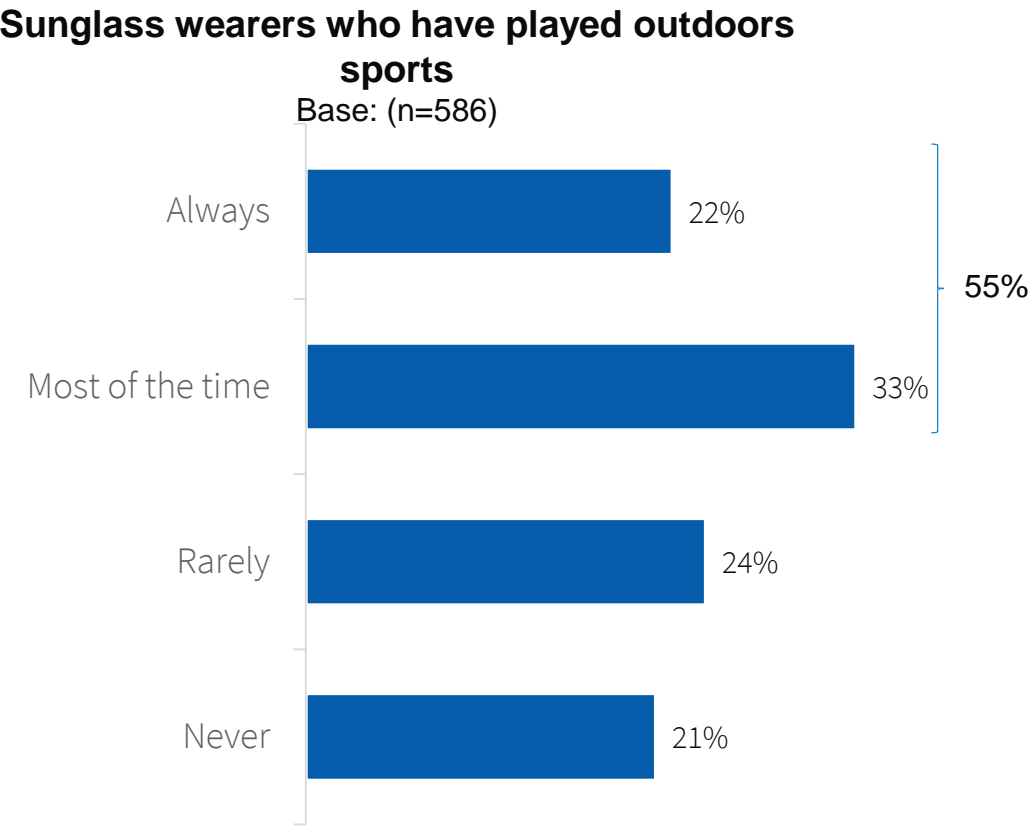
TWO THIRDS OF SUNGLASS WEARERS WHO HAVE HIKE MOUNTAINS WEAR SUNGLASSES WHEN HIKING.

Thinking about how often you wear sunglasses, how often do you wear them while hiking mountainous terrain?



AND OVER HALF OF SUNGLASS WEARERS WHO PLAY OUTDOOR SPORTS REGULARLY WEAR SUNGLASSES WHEN DOING PLAYING.

Thinking about how often you wear sunglasses, how often do you wear them while playing outdoor sports?





TRACKING QUESTIONS (SLIDES 7-42)



COMPREHENSIVE EYE EXAM (SLIDES 43-56)



PEDIATRICS (SLIDES 57-80)



DIABETES (SLIDES 81-100)



CONTACT LENSES AND GLASSES (SLIDES 101-135)

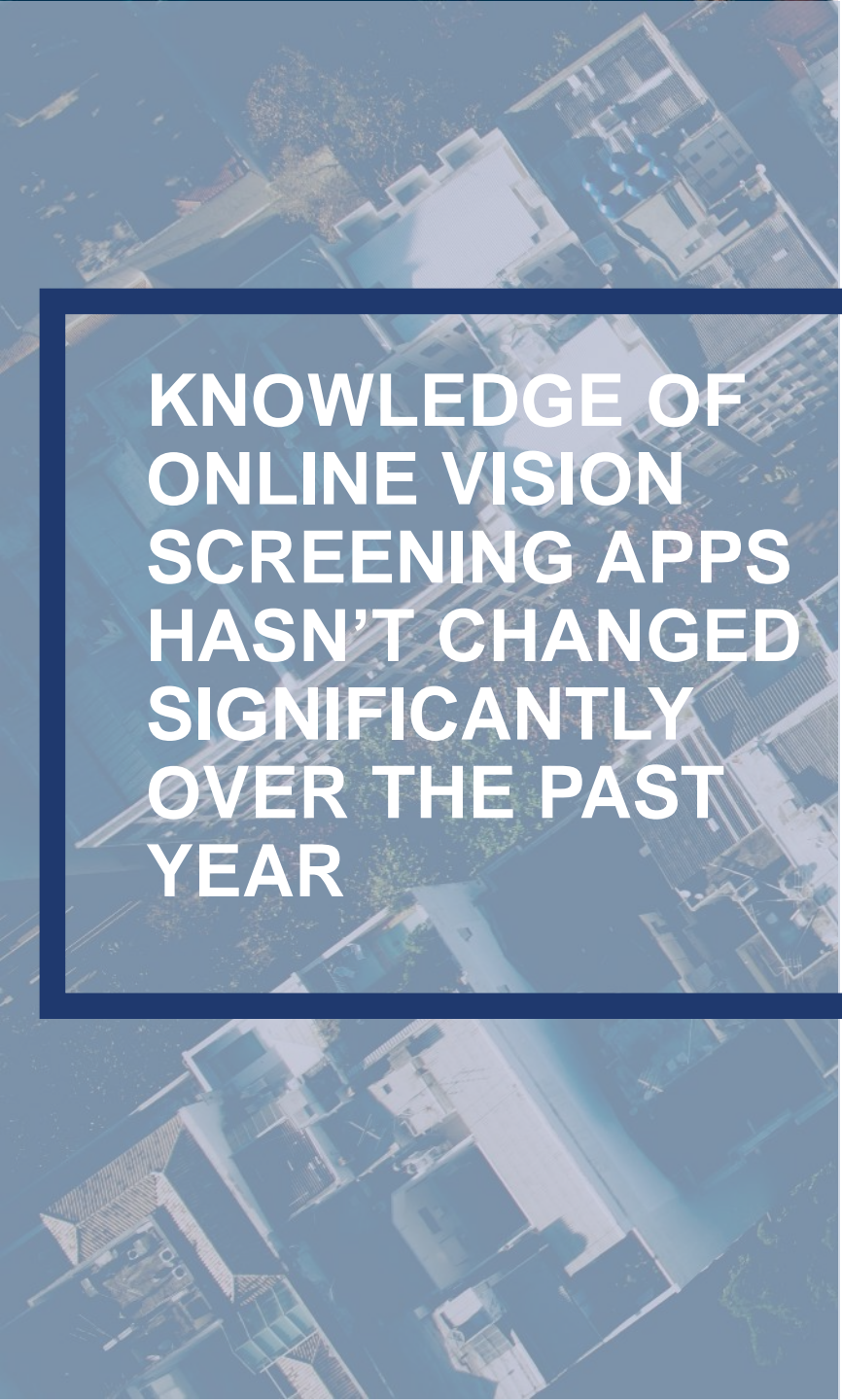


ONLINE VISION SCREENING APPS (SLIDES 136-143)



GAMING/SPORTS (SLIDES 144-149)





KNOWLEDGE OF ONLINE VISION SCREENING APPS HASN'T CHANGED SIGNIFICANTLY OVER THE PAST YEAR

Awareness and usage of online vision screening apps remains relatively low, staying consistent with data from previous years.

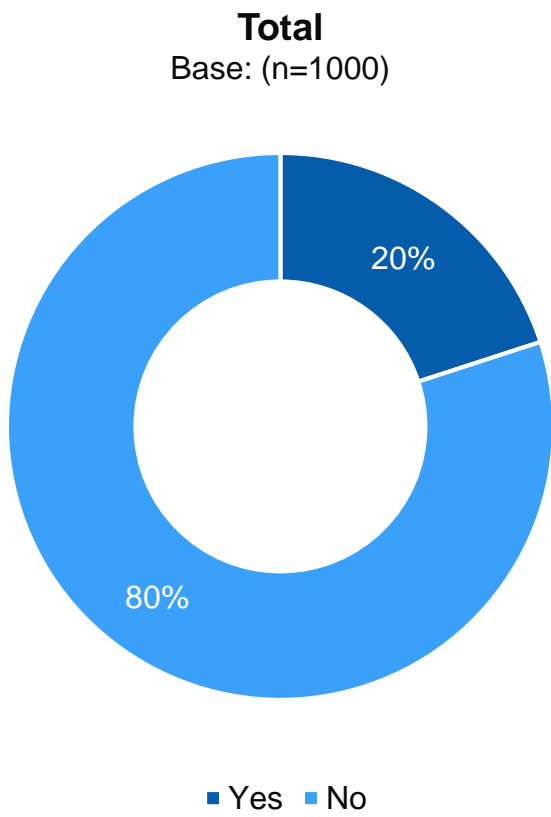
- One in five (20%) Americans have heard of online/mobile vision apps, similar to 24% in 2017 and 22% in 2016.
- In both 2017 and 2018, 11% of respondents reported to have used an online vision screening app for a vision screening, compared to 9% in 2016 – keeping a consistent narrative that most people have yet to use an online vision screening app.

A third of Americans still say they're likely to use an online vision screening app in the future.

- They most commonly think that online vision screening apps would be able to provide vision screenings (38%), followed by updated prescriptions (28%). Only 5% think they could provide comprehensive eye exams.
- While 87% don't think an online vision screening app is a substitution for a comprehensive eye exam, one in ten (13%) do.

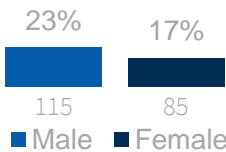
ONE IN FIVE AMERICANS ARE AWARE OF ONLINE VISION SCREENING APPS.

Before taking this survey, were you aware that there were online vision screening apps available that market themselves as providing vision tests that can give you a glasses/contact lens prescription?

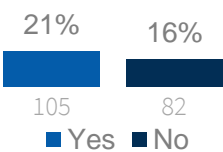


% Yes

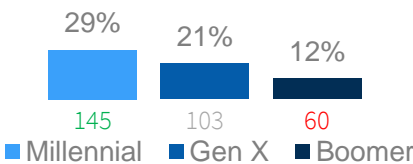
Gender
Base: (M=491) (F=509)



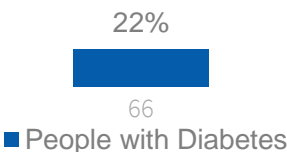
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

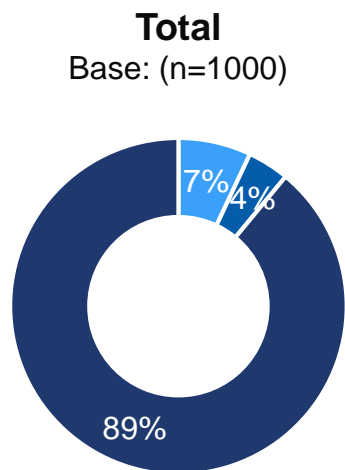


People with Diabetes
Base: (D=129)



NEARLY NINE IN TEN AMERICANS HAVE NEVER USED AN ONLINE VISION SCREENING APP.

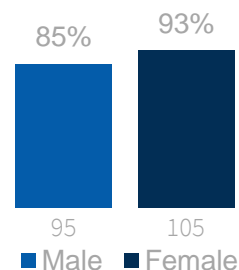
Have you ever used an online vision screening app for a vision screening before?



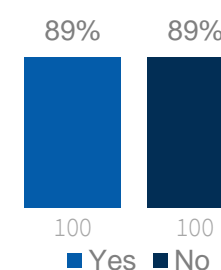
- Yes, I used the online vision screening app for a vision screening and I used the prescription to get new glasses or contact lenses.
- Yes, I used the online vision screening app for a vision screening, but I did not use the prescription to get new glasses or contact lenses.
- I have never used an online vision screening app.

% No

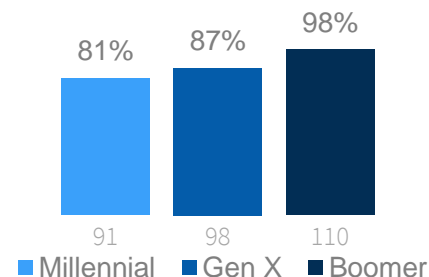
Gender
Base: (M=491) (F=509)



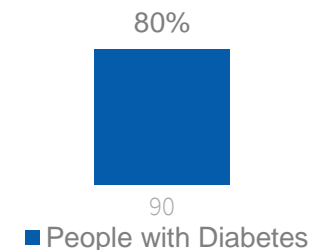
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)

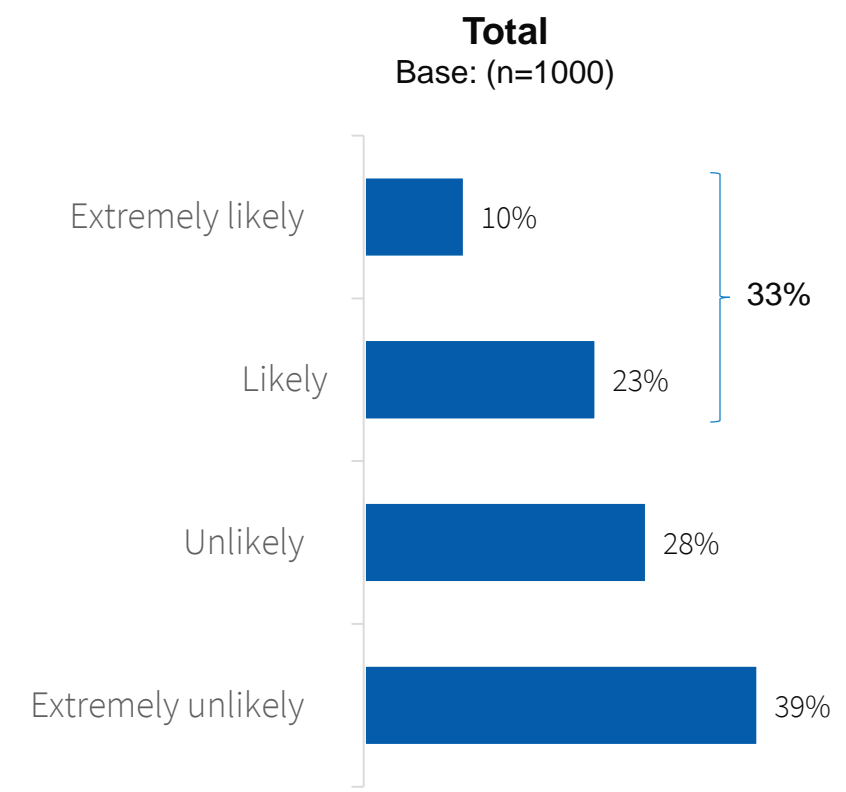


People with Diabetes
Base: (D=129)

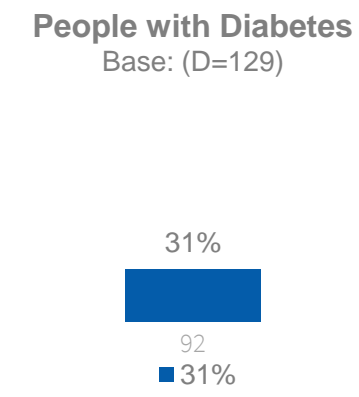
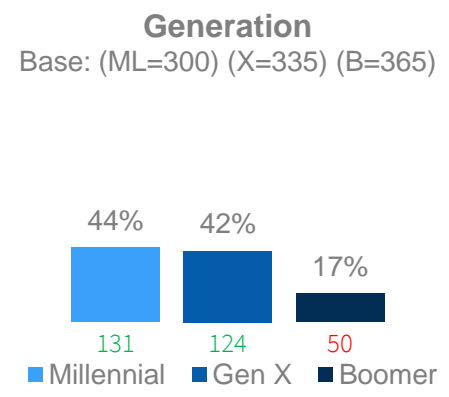
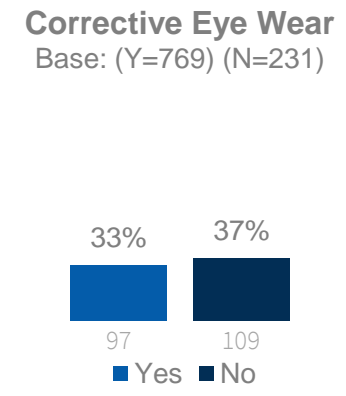
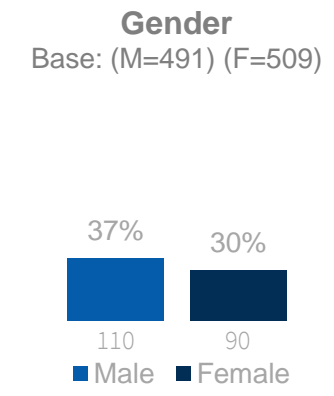


BUT A THIRD OF AMERICANS SAY THEY ARE LIKELY TO USE AN ONLINE VISION SCREENING APP IN THE FUTURE.

How likely would you be to use an online vision screening app for vision screenings or to get a prescription in the future?

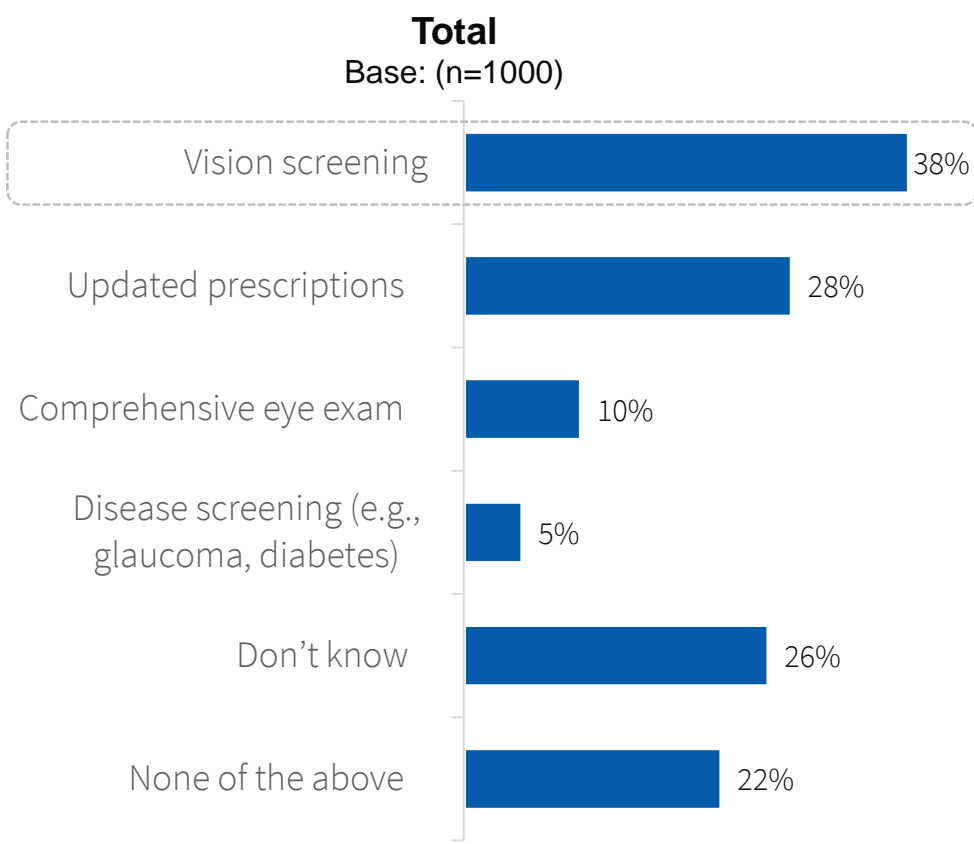


% Extremely likely or likely

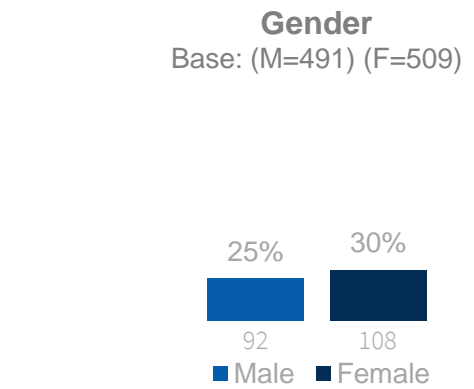


AMERICANS MOST COMMONLY BELIEVE ONLINE VISION SCREENING APPS WOULD BE ABLE TO PROVIDE VISION SCREENINGS.

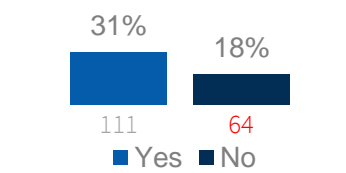
Which of the following do you think an online vision screening app would be able to provide? Please select all that apply.



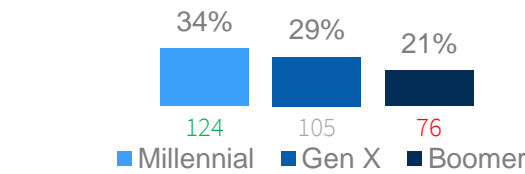
% Updated prescriptions



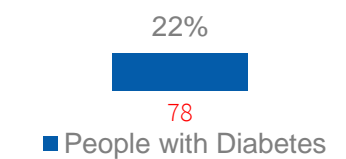
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



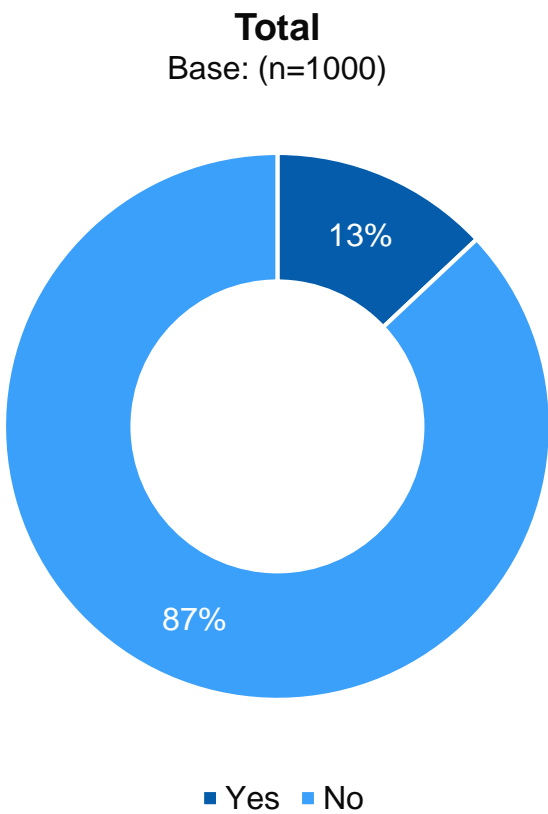
People with Diabetes
Base: (D=129)



Q31. Which of the following do you think an online vision screening app would be able to provide? Please select all that apply.

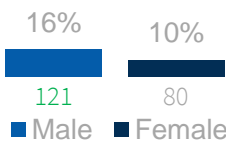
MOST AMERICANS DO NOT SEE AN ONLINE SCREENING APP AS A SUBSTITUTION FOR A COMPREHENSIVE EYE EXAM.

Do you think an online screening app is a substitution for/the same as a comprehensive eye exam?

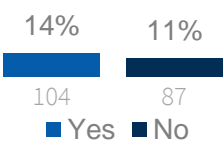


% Yes

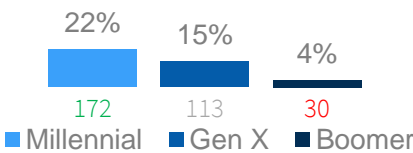
Gender
Base: (M=491) (F=509)



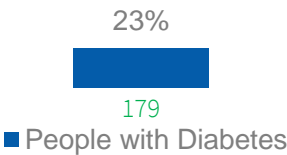
Corrective Eye Wear
Base: (Y=769) (N=231)



Generation
Base: (ML=300) (X=335) (B=365)



People with Diabetes
Base: (D=129)

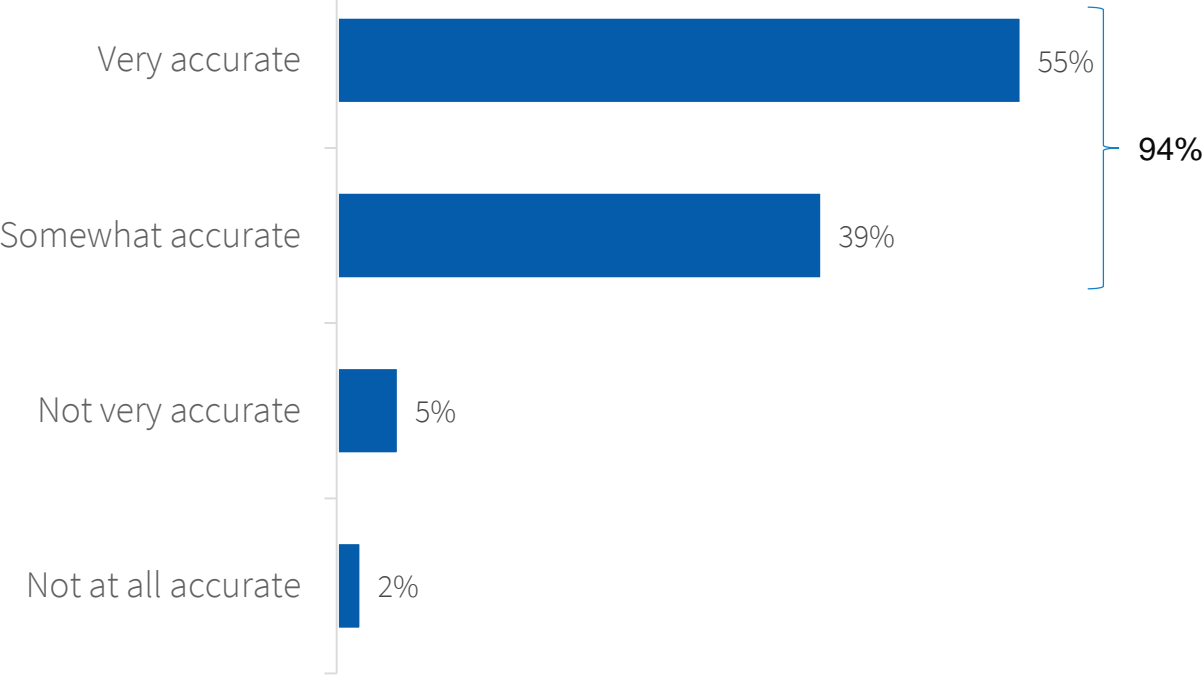


94% OF PEOPLE WHO HAVE GOTTEN A PRESCRIPTION FROM AN ONLINE VISION SCREENING APP RATE THEIR PRESCRIPTION AS ACCURATE.

You mentioned that you used a prescription from an online vision screening app to get new glasses or contact lenses. How accurate did your new lenses seem?

People who have used online vision screening apps to get new corrective eye wear

Base: (n=66)



Note: Base sizes are too low to show demographic breakouts This should be used as directional information only.



TRACKING QUESTIONS (SLIDES 7-42)



COMPREHENSIVE EYE EXAM (SLIDES 43-56)



PEDIATRICS (SLIDES 57-80)



DIABETES (SLIDES 81-100)



CONTACT LENSES AND GLASSES (SLIDES 101-135)




ONLINE VISION SCREENING APPS (SLIDES 136-143)



GAMING/SPORTS (SLIDES 144-149)





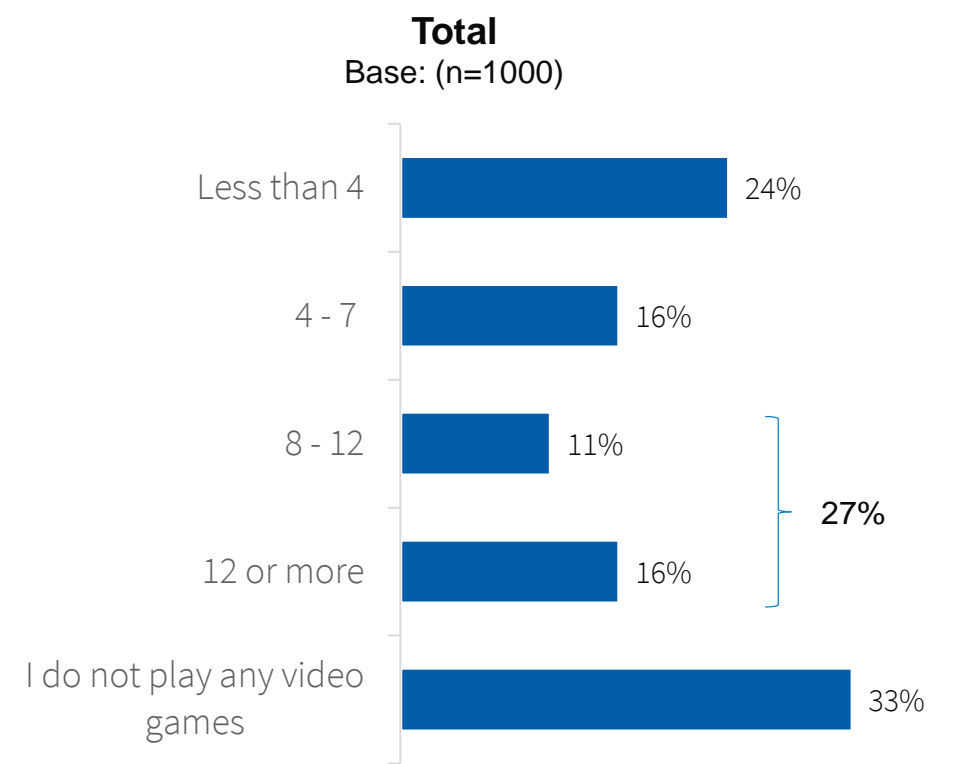
A QUARTER OF AMERICAN ADULTS PLAY EIGHT OR MORE HOURS OF VIDEO GAMES PER WEEK

A quarter (27%) of Americans spend at least 8 hours playing video games on electronic devices each week.

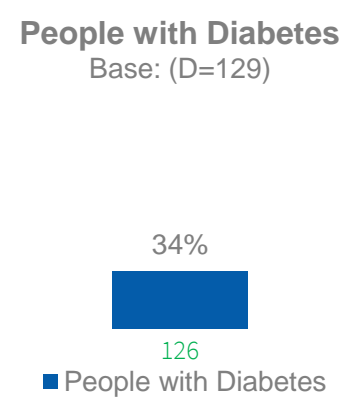
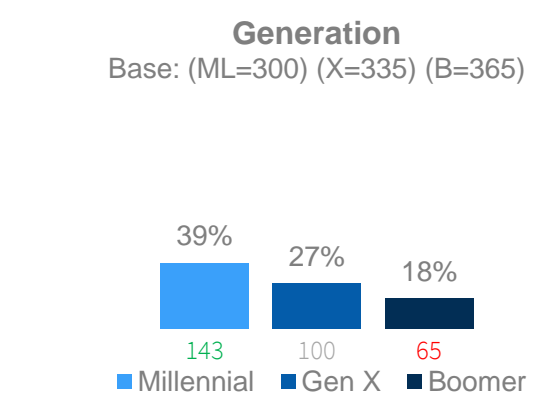
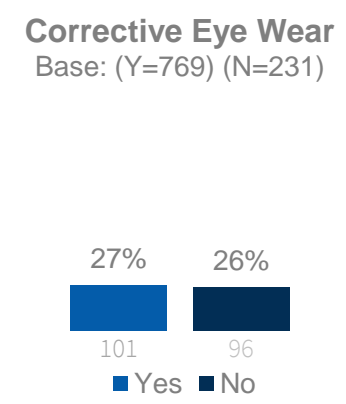
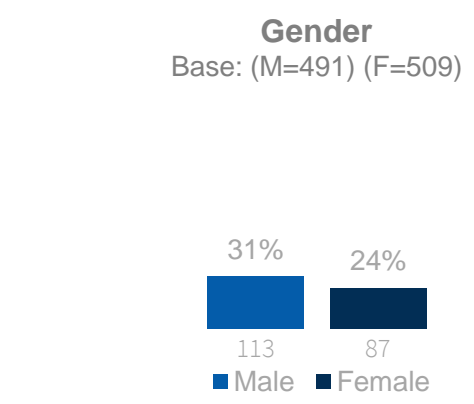
- 67% of Americans play video games every week, and 27% say they spend at least 8 hours playing on an electronic device.
- Blurry vision, dry eyes, and neck/shoulder pain are common problems experienced by people who play video games, with nearly two in five (37%) saying they've experienced each of these before.

SLIGHTLY OVER A QUARTER OF AMERICANS PLAY VIDEO GAMES FOR EIGHT OR MORE HOURS PER WEEK.

How many hours per week do you, personally, spend playing video games on any electronic device?

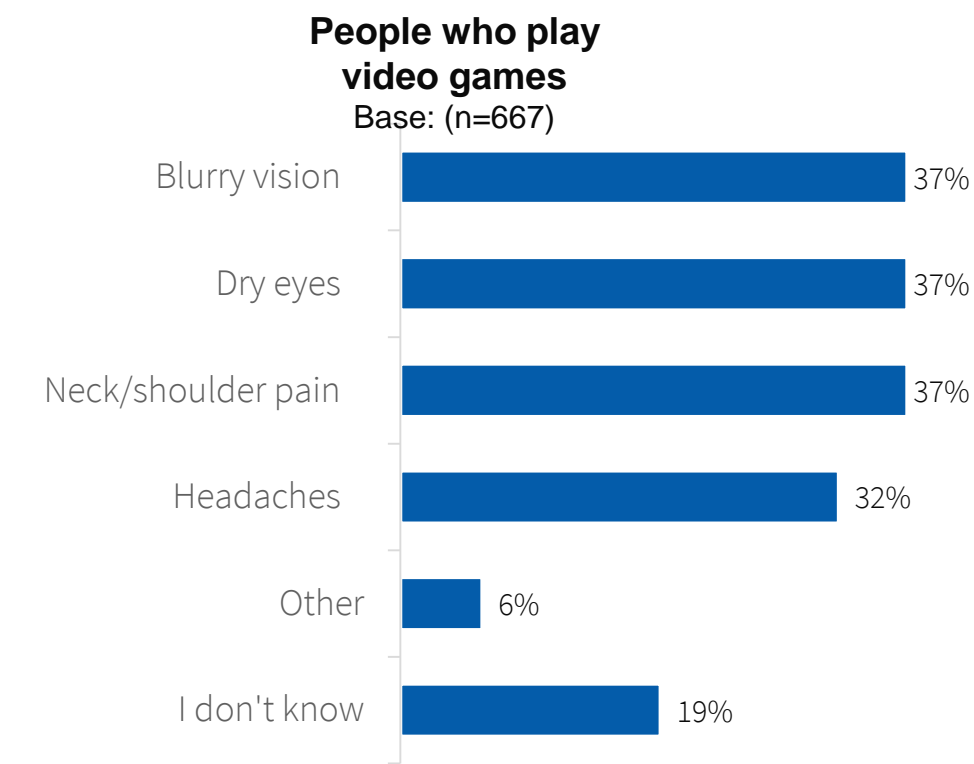


% 8 or more

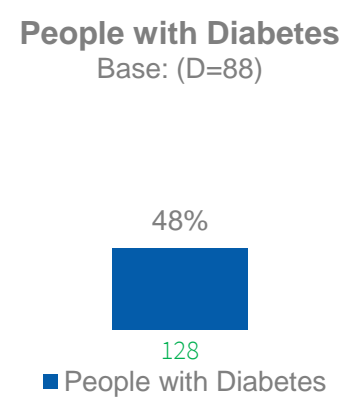
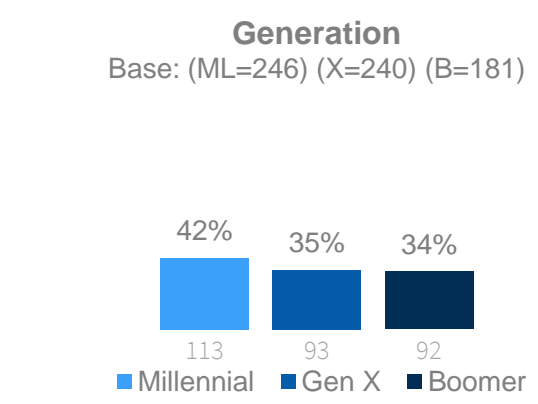
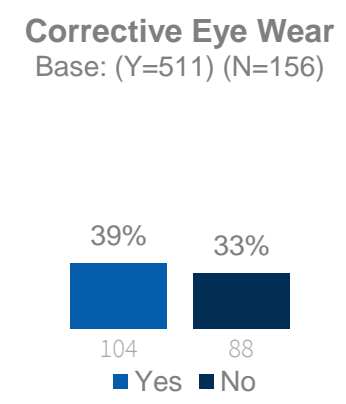
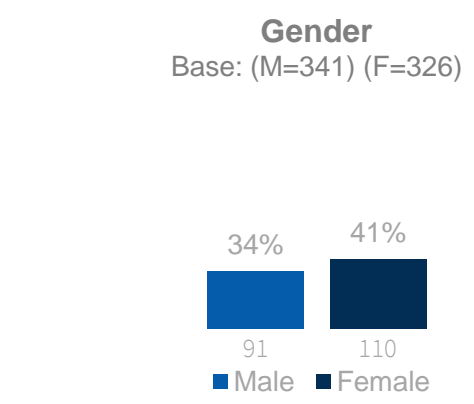


BLURRY VISION, DRY EYES, AND NECK/SHOULDER PAIN ARE COMMON PROBLEMS EXPERIENCED AFTER EXCESSIVE VIDEO GAME PLAY.

Do you ever experience any of the following problems after excessive game play? Please select all that apply.



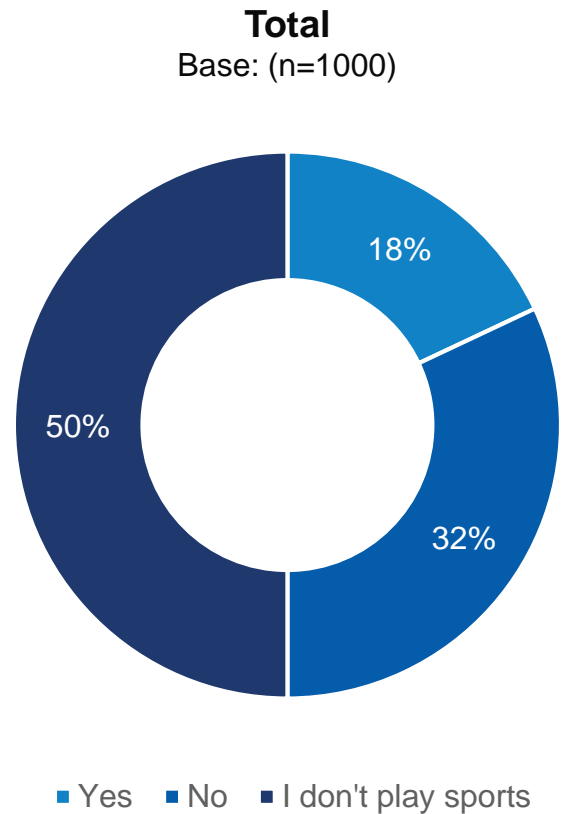
% Blurry vision



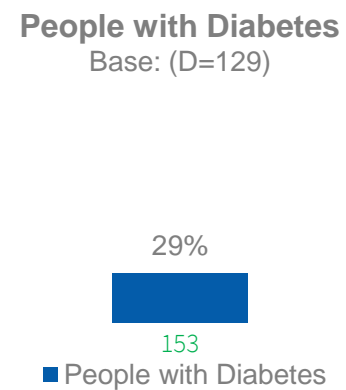
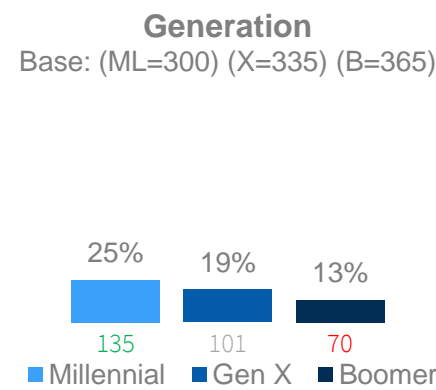
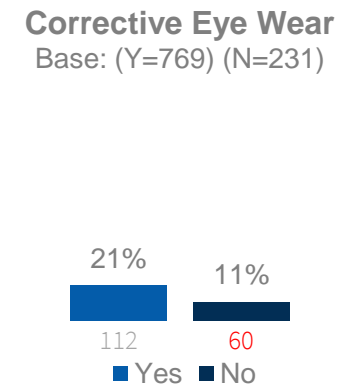
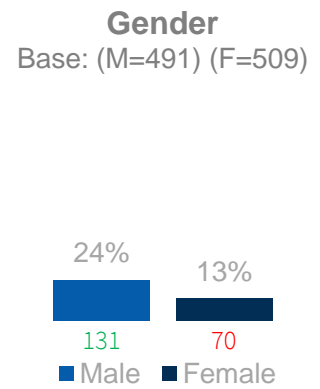
Q68. Do you ever experience any of the following problems after excessive game play? Please select all that apply.

OF PEOPLE WHO PLAY SPORTS, 37% WEAR PROTECTIVE EYEWEAR WHEN DOING SO.

When playing sports (such as basketball, baseball, hockey, soccer, volleyball, football, golf, wrestling, etc.), do you wear protective eyewear?



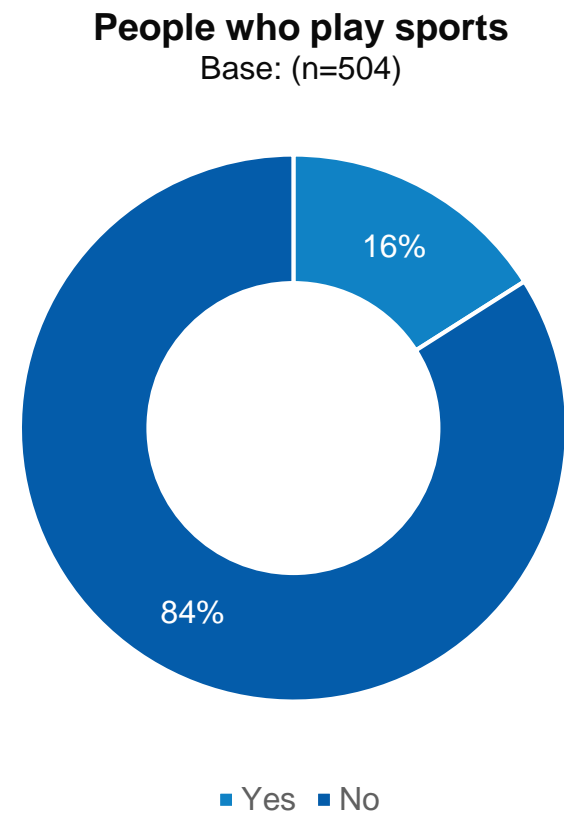
% Yes



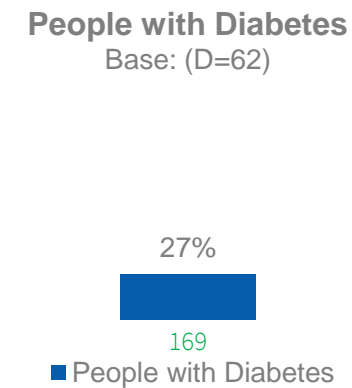
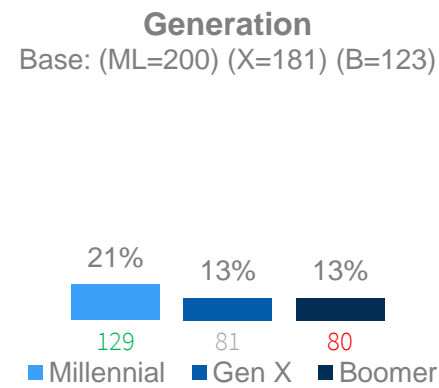
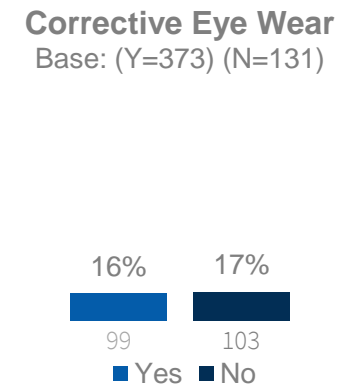
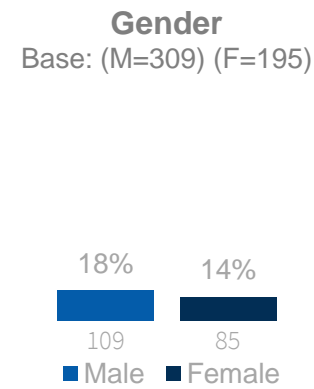
Q65. When playing sports (such as basketball, baseball, hockey, soccer, volleyball, football, golf, wrestling, etc.), do you wear protective eyewear?

FEW PEOPLE WHO PLAY SPORTS HAVE HAD AN EYE INJURY WHILY PLAYING, AS ONLY 16% SAY THEY HAVE.

Have you ever had an eye injury while playing sports?



% Yes



THANK YOU

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