REMARKABLE RESILIENCE: PRESCRIBING CONTACT LENSES IN A CHALLENGING ECONOMY
U.S. Consumer Data Reveals Opportunities for Practice Growth and Patient Vigilance

OCTOBER 2022
The U.S. and global economies have been challenging over the last year, ravaged by geo-political events that left few businesses and individuals untouched. Yet the optimism of the contact lens industry remains intact.

Past periods of economic strife—recessions included—have seen the contact lens category remain relatively free from issues that plagued other products and services. These essential medical devices offered a haven for eye care practices and retailers, with continued strong sales and consumer adoption.

But why—and can we expect the same this time around? The Contact Lens Institute (CLI) decided to find out.

Our organization advances the latest innovations in safe and effective contact lens and lens care products and services that provide unique benefits to patients, while satisfying the evolving needs of eye care professionals. As part of our See Tomorrow (seetomorrownow.com) initiative, we commissioned a survey of U.S. adults to dig deeper into how contact lenses were being used and perceived as inflationary pressures took hold.

What we found affirms the instincts of many practitioners and business leaders—i.e., contact lenses offer significant value—and provides even more confidence for continued fitting. Americans deeply value their eyesight, and their intended and actual spending reflects those beliefs.

Our research also uncovered that some contact lens-related behaviors may change with personal financial pressures. The eye care community can and should proactively address potential shifts with patients, ensuring they receive the best possible buying and wearing experiences.

On behalf of our members—Alcon, Bausch + Lomb, CooperVision, and Johnson & Johnson Vision—we invite you to review this timely data, consider insights contributed by our 2022 Contact Lens Institute Visionaries, and share the information with your peers and staff.

Sincerely,

STAN ROGASKI,
EXECUTIVE DIRECTOR
Contact Lens Institute

BILL REINDEL, OD,
2022 BOARD CHAIR
Contact Lens Institute
The See Tomorrow series explores consumer perspectives surrounding issues that can influence contact lens fitting and wear. The organization began this effort in 2021, uncovering consumer sentiments specific to lifestyle changes that resulted from the pandemic and giving practitioners new ways to engage their patients. Shortly thereafter, new work uncovered common myths and misconceptions that U.S. consumers had regarding contact lenses.

CLI recently commissioned Prodege, a global consumer insights firm, to conduct research for its newest report. From August 9-17, 2022, 2,439 adults ages 18 and older residing in the United States—59% of whom required vision correction—participated in a custom-designed survey using a proprietary online tool. From this pool, 251 active contact lens wearers answered a series of detailed questions.

Respondents were balanced against the U.S. general population in regard to several demographic categories such as age, household income, location, gender, and race to present an accurate representation of the contact lens-wearing public.

Among active contact lens wearers, 43% indicated they wore their lenses most often, 32% indicated they wore lenses and glasses about equally, and 25% said they wore their glasses most often. Respondents also reflected common soft contact lens modality use, with 24% in daily disposable/1-day lenses, 23% in two-week lenses, and 39% in monthly lenses.

### TYPE OF CONTACT LENSES WORN:

- Monthly soft contact lenses: 39%
- Daily disposable/1-day soft contact lenses: 24%
- Two-week soft contact lenses: 23%
- Rigid gas permeable contact lenses: 10%
- Don’t know/Not sure: 3%
- Scleral contact lenses: 2%

Preferences among those who wear both contact lenses and eyeglasses:

- “I wear my contact lenses most often, and eyeglasses occasionally” 43%
- “I swap back and forth between contact lenses and eyeglasses equally” 32%
- “I wear my eyeglasses most often, and contact lenses occasionally” 25%
Make no mistake about it: Americans overwhelmingly value their contact lenses and eyeglasses. When asked to value 26 different product and service types, including personal health and beauty items, clothing, entertainment and more, 84% of people ranked their contact lenses as extremely or very important—higher than any other category, including eyeglasses (75%).

The importance of contact lenses also increases with age, jumping from 79% among people ages 18-34 to 87% among ages 55 and older.

Similarly, respondents were asked to consider what other purchases they’d trade off to keep their contact lenses. More than nine out of 10 (94%) contact lens wearers say that if they had to make hard choices due to a change in income or lifestyle, they’d rather make sacrifices in other areas before they’d give up their lenses.

What would they give up completely? The top items included casino/online gambling (44%), in-theater movies (38%), subscriptions for online/print publications (33%), aesthetic beauty services (32%), and alcohol/tobacco products (31%). They’d also reduce (but not fully relinquish) dining out (33%), day/weekend trips (33%), live event entertainment (33%) new clothing (33%), new footwear (27%), and home décor (24%).

A Focus on Health & Wellness

It’s in our patients’ best interests—and for my practice as well—to present contact lenses as having substantial value. They should never be framed as an expense. The new CLI data backs this up, showing just how important they are to wearers in contrast to other common items in their lives.

My office provides a sheet that details our pricing. Transparency fights perceptions that our contact lenses might be expensive when they’re very competitive.

Remember that you’re never selling. As doctors to whom our patients are turning for professional guidance, we are offering the best possible solution for each person’s health and well-being.

Our specific contact lens choices are based on what we know to be optimal, and we should make sure to communicate this ‘why’ as much as the ‘what’ in our conversations. Coupling clinical expertise and business savvy with consumer enthusiasm makes it an excellent time to grow your contact lens practice.

JASON TU, OD
Invision Optometry, San Diego, Calif.
2022 Contact Lens Institute Visionary
WILLINGNESS TO SPEND MORE

The more that consumers spend on their contacts each year, the more value they place on them. Among people who spend less than $400 each year, 11% say they would never stop wearing their contact lenses no matter the cost. This increases to 30% among those who spend $1,000 or more per year, reinforcing the impact that these lenses make on their lives.

In another test of perceived value, wearers said they would more than double what they’re currently paying before giving up their contacts altogether.

What about potential wearers being scared away by contact lens costs? That has proved largely untrue, representing a fraction of the eligible base.

Among the broader pool of vision-corrected consumers who never tried contact lenses (n=741), just 15% reported price as being a barrier. Among respondents who tried contact lenses but no longer wear them (n=396), 19% reported price as a reason. Both data points support the opportunity to fully discuss the contact lens value equation during the consideration and follow-up care stages.

Not Pre-Determining Spending Capacity

The latest consumer data from the Contact Lens Institute reflects that consumers consider value—not cost—as a primary driver of contact lens loyalty. Furthermore, significant percentages of wearers—ranging from 61% to 90% depending on their current annual spending ranges—are willing to pay even more, displaying their considerable worth.

As a medical professional, my responsibility to each patient is to prescribe the best eye care solution that ensures a lifetime of optimal vision and eye health. As a business owner of a successful private practice, my responsibility to each team member is to enable them to educate every patient on why we always prescribe the latest technology and the best performing lens.

Our office prescribes a considerably higher percentage of premium disposable lenses than a typical U.S. eye care practice. In addition to communicating effectively about lens performance and protective features, we have learned to never pre-determine a patient’s spending capacity. Every contact lens patient is educated on why a specific product or two is prescribed, then given the chance to wear each lens. The patient decides on the final lens based on its performance, and sometimes budget. A few extra minutes of conversation about “why this lens” is worth a lifetime of patient satisfaction—and that is time well spent!

Price vs. Value

Most eye care professionals shy away from talking about price in the exam room, with good reason. We want to make a separation between prescribing the optimal, healthy option for the patient versus selling a contact lens in an effort to stay competitive.

A distinction can be made about price versus value. CLI research indicates value supersedes what patients may assume about price. Patients place an enormous value on being able to wear contacts lenses and price is not a predominant factor. Case in point: people are willing to spend more than double on contact lenses before they would be willing to give up their contact lens wear all together.

This should encourage eye care professionals to more freely discuss the most up-to-date options when it comes to contact lens modalities without expectation that price is the main driver. The advancement in the types of contact lenses now available presents an opportunity for practices to provide excellent care while capturing contact lens patients. The result is success for everyone.
EYE CARE RESISTS INFLATION

Intentions compared to actual behaviors can sometimes vary. So, while U.S. consumers indicated they would give up or cut back on other products or services before contact lenses if faced with economic challenges, would that actually hold true? The answer is a resounding yes.

When asked about how inflationary pressures had altered their household spending, three categories emerged as having the most significant resistance. Less than one in 10 respondents said they had made spending changes in contact lenses (8%), pet products (8%), and prescription eyeglasses (7%).

This is in stark contrast to choices to cut spending in multiple other categories. Dining out (46%) topped the list, followed by categories such as live entertainment (35%), vacation travel (33%) and day/weekend trips (31%), and new clothing and footwear (30% each).

The survey aligned to the ‘lipstick index’ used during times of economic pressure—including the current period—that illustrates healthy spending on items that enhance self-care and appearances. Respondents indicated that haircare products (14%), personal health products (13%), and skincare products (13%) were all experiencing limited downside effects.

It’s important to acknowledge that 17% of households reported no change to their spending because of inflation—a reminder that economic challenges may not have universal impacts on consumer purchasing power, at least within this current episode.

Areas of Reduced Spending Due to Inflation

46%  Dining Out
35%  Live Event Entertainment
34%  In-Theater Movies
33%  Vacation Travel
31%  Day/Weekend Trips
30%  New Footwear
30%  New Clothing
27%  Technology Upgrades
26%  Home Décor
25%  Alcohol & Tobacco Products
25%  Creative Hobbies
25%  Casino/Online Gambling
24%  Aesthetic Beauty Services
24%  Daily Beverage Purchases
22%  Haircare Services
19%  Personal Health Services
18%  Aesthetic Dental Services
17%  Online/Print Publication Subscriptions
15%  Streaming Services/Cable TV
15%  Prescription Sunglasses
14%  Haircare Products
13%  Personal Health Products
13%  Skincare Products
8%  Pet Products
8%  CONTACT LENSES
7%  PRESCRIPTION EYEGLASSES
17%  None of the Above

CONTACT LENSES & PRESCRIPTION EYEGLASSES SHOW THE MOST RESILIENCY DURING INFLATION

I’ve always remarked that eyesight is one of the last things any of us want to lose. The Contact Lens Institute ‘Remarkable Resilience’ report backs that up with data. Patients will prioritize their vision, even in times of inflation and economic hardship.”

MELANIE DENTON, OD
Salisbury Eyecare & Eyewear, Salisbury, NC
2022 Contact Lens Institute Visionary

Investing in What Matters

What people say versus what they end up doing can sometimes vary. We saw this during the height of the COVID-19 pandemic, when people shared that they were eating healthier, but comfort food and snacks sales surged. When it comes to eye care, though, spending is aligning with intent despite economic turbulence.

We should be encouraged that personal health services along with eye care is performing well, giving us even more reason to not change course in our prescribing habits. Yet we cannot overlook possible changes to patients’ lives. It’s important to reinforce that any changes in spending habits should not come at the expense of their well-being—we’re here to help them make the best choices.

If patients say that financial pressures are making them seek less expensive options, the CLI value and spending research can help you demonstrate they’re not alone. For instance, mention that many are choosing to spend less on a broad range of other products and services to maintain their eye health—and don’t be shy about giving specific examples. By helping patients continue to invest in what matters most, they—and you—will have the best possible experience and outcomes.
CHANGES TO CONTACT LENS HABITS

While consumers indicated the importance of their contact lenses, backed up by little changes to category spending, they did project shifts to their contact lens purchasing and wear-and-care behaviors if faced with financial headwinds.

Approximately one in four adults said nothing would vary (27%)—a good statistic, but not so strong as to allow the eye care community to overlook the other 73%.

30% of people noted they might wear contact lenses less frequently in times of economic challenge, intimating that they would ‘get by’ with the perceived fixed cost of eyeglasses (although only 12% would move completely to glasses wear). Eye care professionals may wish to reinforce the complete range of benefits of contact lenses, moving beyond vision correction alone to confidence building, their impact on self-image, enriched lifestyle and activity choices, and other factors previously established in the industry.

Others may seek less expensive options online (27%) and through their eye care professional (26%). These are not mutually exclusive behaviors—about half would approach both channels to seek value. While continuing to confidently prescribe the best possible lens for each patient, eye care professionals should also maintain close contact with their entire patient base, reinforcing why any contemplated change should be done in consultation with the practice.

A smaller number reported they would consider actions that could put their eye health at risk, such as wearing their lenses for more days than approved (24%), “topping off” cleaning solution (12%), and using less cleaning solution for cleaning and storage (11%).

Getting ahead of these risky actions is critical to preserving patients’ long term contact lens satisfaction and good vision. One of the simplest methods is to have a brief yet meaningful conversation with each contact lens patient at every visit. The EASY Way (EASYWayProgram.org) from the Contact Lens Institute offers a model and patient-facing practice tools that can help.

Evidence of Inflation / Economic Pressure on Contact Lens Use

Seeking Less Expensive Options:

- **SEARCH ONLINE**
  - 27%

- **ASK MY EYE CARE PROFESSIONAL**
  - 26%

Risky Behaviors:

- **“TOP OFF” CLEANING SOLUTION IN MY CONTACT LENS CASE INSTEAD OF USING FRESH SOLUTION EACH TIME**
  - 12%

- **USE LESS CLEANING SOLUTION WHEN RINSING AND STORING MY CONTACT LENSES**
  - 24%

- **WEAR MY CONTACT LENSES FOR MORE DAYS THAN APPROVED**
  - 11%
Encouraging Good Behaviors with Affirmations

The CLI research indicates about one in three contact lens wearers may exhibit some type of bad behavior—e.g., overwearing their lenses, topping off cleaning solution, or using less solution and drops—when faced with financial challenges, and it’s our job to get ahead of that. Let’s not wait for a problem to develop.

My love language is words of affirmation, and this works to encourage good behavior. Say thanks to patients for replacing their lenses on time. For using brand name solution. For being a patient who schedules regular visits. That speaks volumes, rewarding them for good, positive choices compared to the tail-between-the-legs lecture they don’t want to hear.

Remember to emphasize why it’s important for patients to contact the office about any changes they may be thinking about making. It only takes a few seconds to provide this ‘why’ and reinforce healthy habits, which are all part of a good experience. We’re here to look out for them, no matter what!

“Say thanks to patients for replacing their lenses on time. For using brand name solution. For being a patient who schedules regular visits. That speaks volumes ...”
Even though cost is not a major factor in shaping the importance that consumers place on their contact lenses, there is always opportunity to create even more affinity through services, pricing, and ancillary products. The survey asked current wearers about 12 different possibilities that eye care practices could offer to improve their perceived value of contact lenses.

Ranking highest—as selected by 40% of people—was offering a discount on eyeglasses for backup purposes. With nine of 10 total respondents reporting they wear both their contacts and eyeglasses, this may be an opportune method to build practice loyalty and grow additional revenue. Interestingly, only 24% chose offering a sunglasses discount.

Next highest were three offers already at practices’ disposal that would likely benefit from more explicit positioning as value-added products. 38% of wearers would like free trials of upgraded lenses to assess if they like them, 33% want temporary lenses while their order is being fulfilled, and the same percentage want contact lens solution and rewetting drop samples. Another 27% want a follow-up exam to ensure a proper fit at no additional cost, which may impact practices’ approaches to bundled services.

With the expectation of home delivery taking root across so many other aspects of society, it stands to reason that 31% of respondents want free contact lens ordering and shipping service.

For the minority of consumers who are cost-sensitive, payment plans may prove useful: 25% believe they increase the value of their contact lens experience.

Finally, patients want eye care professionals to recommend the best lenses for them. While it’s a seemingly innocuous desire, CLI research conducted in March 2022 illustrated that fitters may not be initiating these conversations on a regular basis. In fact, one in four (24%) current wearers want their eye doctor to take the time to talk about the different types of lenses that are appropriate, and the same percentage want to be made aware of upgraded contact lenses and related products that would offer a better experience.
RETAINING AND ATTRACTING NEW WEARERS

With this work’s primary focus on active contact lens wearers, the findings can help practices affirm and increase the value of the category to keep consumers satisfied and encourage repurchases. Yet the survey also delved into people’s rationale for never trying contact lenses, as well as asking why people ceased wear.

Among the broader pool of respondents who had never worn contact lenses (n=741), three of five (61%) didn’t like the idea of putting something in their eyes (with men reporting this more often). This may be worthy of additional research to determine the physiological versus psychological cause. In either case, it speaks to the need for practices to ensure they have built trust with patients and created a robust, confidence-boosting insertion and removal training process.

About one in three people (35%) who have never worn contact lenses believe they may be uncomfortable—another reason to speak to new contact lens materials and technologies that have vastly improved comfort over the past several years. And speaking of speaking, 17% of this group indicated their eye care professional had never discussed contact lens wear as a possibility.

Lapsed users paint a similar picture in many ways. 41% report discontinuing contact lenses because of comfort, and 30% said their insertion or removal troubles were the cause. 26% noted that their contact lenses took too much time to care for. Males were more likely to cite each of these compared to females—especially for comfort (49% male, 36% female). In all these instances, practices should reengage prior wearers, discussing upgraded material and design options as well as modalities such as daily disposables/1-day products.

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<tr>
<th>Reasons for Never Trying Contact Lenses:</th>
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<tbody>
<tr>
<td>61% I do not like the idea of putting something in my eyes</td>
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<tr>
<td>45% I just prefer to wear eyeglasses</td>
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<tr>
<td>35% I believe they may be uncomfortable</td>
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<tr>
<td>17% My eye doctor never talked to me about contact lenses</td>
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<tr>
<td>15% They are too expensive</td>
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<tr>
<td>14% My eye doctor said they are not appropriate for me</td>
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<tr>
<td>12% I like the way I look in eyeglasses</td>
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<tr>
<td>9% I don’t believe my eye sight/vision allows me to wear contact lenses</td>
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<td>4% Friends/family have not had good experiences with contact lenses</td>
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<tr>
<th>Reasons for Lapsed Use:</th>
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<tr>
<td>41% They are not comfortable</td>
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<tr>
<td>30% I have trouble inserting or removing them</td>
</tr>
<tr>
<td>28% I just prefer to wear eyeglasses</td>
</tr>
<tr>
<td>26% They took too much time to care for</td>
</tr>
<tr>
<td>19% They are too expensive</td>
</tr>
<tr>
<td>15% My vision using glasses is better than when using contact lenses</td>
</tr>
<tr>
<td>12% My eye doctor said they are not appropriate for me</td>
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<tr>
<td>7% I like the way I look in eyeglasses</td>
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<td>5% I had LASIK/refractive surgery</td>
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ELISE KRAMER, OD, FAAO, FBCLA, FSLES
Miami Contact Lens Institute, Miami, Fla.
2022 Contact Lens Institute Visionary

Everyday Conversations to Gain & Retain Wearer

People may not talk about it, but contact lenses are really important to them—something the latest CLI research shows. Even though most everyone has the option to wear glasses, many patients see contact lenses as a necessity. That’s a simple but powerful insight we can use every day.

Of course, the average person doesn’t know a lot about contact lenses. In some cases, what they believe may be based on something they experienced or heard years ago. That’s why I bring up contact lens wear to everyone. Even if they’re in for a medical visit, I ask if they’d like to consider contact lenses once we’ve resolved their current issue.

But I don’t leave it to a brief mention. It’s my role to show patients how contact lenses may affect their lives and encourage first-hand experience, including personalized application and removal training to build confidence. For current wearers, especially during the first several months, I reiterate the guidance—an important step to keep them happy and healthy.

And what about people who don’t like touching their eyes? Really, no one likes touching their eye, but it’s something that the vast majority people can learn to accept when they understand all the benefits that contact lenses offer.

We’re here to bridge the education gap—a straight ahead way to create and retain satisfied contact lens wearers.
The economic challenges influencing U.S. consumers and business—and counterparts worldwide—cannot be dismissed out of hand. Yet as this new research demonstrates, they do not need to cause undue alarm for the eye care community.

People are faced with innumerable purchasing choices at every turn—some of the approximately 35,000 conscious decisions an average adult must make each day, according to neuroscientists. Thankfully, their spending—in intent and actual behavior—follows their beliefs that vision and eye health are important. In an independent September 2022 survey of more than 1,000 U.S. vision corrected consumers, research firm Prodege determined that 84% are planning to spend the same or more on eye care products in the next 12 months compared to the prior year.

What this means for the U.S. eye care community is straight-forward: there is every reason to continue prescribing the right contact lenses for patients without pre-judging their spending power, even with the current financial climate. Likewise, proactively having conversations with every patient about new types of lenses, value-added products and services, and healthy wear-and-care habits can improve practice success and patient satisfaction.

For decades, contact lenses have provided millions of people with outstanding vision and unencumbered freedom of wear. They have given practices an exceptional professional services and product offering, with the ability to enhance revenue and deepen patient loyalty. And in today’s world, they offer a haven from economic disruption—stability in the midst of a storm.

We have learned that educating and motivating the staff is absolutely critical for success.”