



Transitions™

FIVE TRENDS
FOR THE **OPTICAL**
INDUSTRY IN **2023**

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INTRODUCTION

Three years into the global pandemic, the optical industry has changed greatly—along with the needs and desires of the patients whom eyecare professionals (ECPs) serve. Beyond this, the needs within the practice and concerns faced by employees are at the forefront of discussions. This piece provides an overview of five optical industry trends—based on research and insights from leading industry professionals—that today’s ECPs can leverage to enhance patient and staff engagement, improve overall satisfaction, and grow their practices.





01

DO MORE WITH EVERY PATIENT: UNDERSTANDING IMPACTS OF THE PANDEMIC

Economic uncertainty spurred by the global pandemic has persisted—and now, three years later, the optical industry (and the world in general) has come face to face with a recession. Amidst an ever-changing world, ECPs are acutely aware of the need to bring more value to patients—and the need to address their patients' desire to seek more efficient and effective solutions that offer multiple benefits.

Many ECPs have noted that while in-person attendance has improved within the past year, throughout the pandemic patients have been coming into the physical office less frequently—and often by appointment only—making each interaction critical. Research in the United States, for example, has shown that less than half (48%) of Americans last visited their eye doctor in 2022—with even more reporting waiting two or more years between scheduling appointments. Additionally, more than one-quarter of patients are struggling to find an eye doctor.ⁱ These findings are similar in Canada—with half of Canadians with vision benefits not using their coverage by the end of 2022. This same report revealed that one-fourth of Canadians who do not wear corrective lenses have not had an eye exam in the past 10 years, despite Health Canada recommending all adults have an exam every two years.ⁱⁱ

Additionally, ECPs have noticed that their patients are becoming increasingly concerned about their economic future—and are looking for products that bring them both short- and long-term value. Beyond wanting more from their lenses, cost can also be an issue for many. In fact, 30% of Americans say they avoid going to the eye doctor all together due to cost.ⁱⁱⁱ A similar percentage of Canadians who do not wear eyeglasses cite cost as a top reason for putting off eye exams.^{iv}

According to data from the Bureau of Labor Statistics, eyecare and eyewear prices rose over the past year—with the Vision Council Director of Research Data and Analytics, Alysse Henkel, noting that patients paid just over 6% more for eyewear products in 2021 vs. 2020.^v While this is not out of line with what is happening in other industries, inflation and economic concerns are very real—making that face-to-face time critical for explaining the benefits of choosing the best eyewear solutions for improving not only vision, but also overall health, wellness and productivity.

Other ECPs shared that patients appreciate the dedicated one-on-one time they have gotten in the office—and that they expect that level of personalized care to continue well into the future. According to the “2022 Health Care Insights Study” released by CVS Health, most consumers want more meaningful and engaging relationships with their healthcare providers—and are bringing with them a new awareness of how physical health connects to social, emotional, and mental health.^{vi,vii}



Patients are starting to come back into the to the office, but they want different things. They are looking for personalized experiences that demonstrate the value of the services eyecare professionals provide. Beyond this, we need to keep an eye on inflation going into 2023, as that may cause additional changes in behavior and a further need for personalization.

—Robert Dalton, Executive Director of the OAC



In the current pandemic environment, patients are thinking more about their health in general, and are doing more of their own research online—something that ECPs should take note of when sharing information with their patients. In fact, one survey found that 42% of Americans research their doctor’s suggestions *after* a visit, with nine out of 10 feeling confident in the information they find online and one-third feeling they learn more there than from their doctor.^{viii} The Canadian Institute for Health Information and other sources have also found that the majority of Canadians are using the internet to search for health information. When patients visit their ECPs, specifically, they are looking for solutions that meet their financial, health and aesthetic needs—and are seeking products that deliver more than one of these benefits at the same time.

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The one-on-one time with the doctor, specifically, is vital. We've seen time after time—and research has backed it up—that patients listen to their doctor's recommendations, which makes them invaluable in not only providing a prescription for visual needs, but also a recommendation for the different types of lenses they should be considering. —Pete Kehoe, OD

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The survival of the small business as independent health care entities depend on customization for consumers—trusted, individual immediate response to their needs. —Diana Monea, OD, FAAO, M.Cert HRM

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Despite the pandemic-spurred changes, ECPs have a positive outlook on the future of the optical industry and their personal businesses. They are viewing their new, more attuned, and more attentive patient base as an opportunity to achieve a greater personal connection, while providing more education on eye health and solutions.

TREND:

ECPs who embrace the opportunity to offer personalized options to patients—and those who take the time to explain the benefits of multi-functional products—can build more meaningful connections with patients and, in turn, bring added success to their practice.





02

KEEP EMPLOYEES ENGAGED: ADDRESSING NEEDS WITH A PEOPLE-FIRST APPROACH

Virtually all industries experienced employee upheaval during the pandemic—and many of these shifts are ongoing. The initial economic retraction led to immediate increased unemployment^x, then transitioned into a phase of change now known as the Great Resignation, or Great Reshuffle^x, in which employees voluntarily decided to make career changes, or leave the workforce all together.

Amidst these macro-level changes, individual companies and organizations—including general health professionals and eyecare professionals—also experienced changes. Employees who have stayed—or those who are new to a company or organization—recognize the opportunity that comes with the shifting power dynamic. In some cases, companies that do not require an in-person presence to complete a job have moved to having fully remote teams, and others to hybrid models.

A recent report from the U.S. Bureau of Labor Statistics found that the percentage of employers offering at least some remote work is up to 40%—up from 22% in 2019 before the pandemic began. One-third of private-sector employers expanded remote-work options for workers during the pandemic, with approximately 60% intending to keep this level of flexibility in place. This includes 39% of health care or social assistance workers, who reported increased telework for some or all employees.^{xi} In Canada, studies have found that 61% of Canadians prefer a hybrid or remote work model compared to an on-site one.^{xii}

Employees today are also expecting greater flexibility from their employers—demanding benefits to address burnout (which 40% of workers strongly or somewhat agreed that they are on the verge of); mental health and wellness; and programs that build positive cultures to further engagement and keep them coming back to work. But while intentions are good, there is a great disconnect between employers and employees—with a survey from The Hartford finding that while 82% of employers said their workforce has more access to mental health resources than in previous years, only 50% of employees said the same. Additionally, while 79% of employers said mental health had improved thanks to the company’s resources, only 35% of workers said the same.^{xiii}

Front-line workers in particular—including those in the optical industry—experience burnout and mental health problems acutely. Many are grappling with concerns (for themselves and for their patients) about providing safe and healthy care during a pandemic—all while trying to keep their businesses afloat during times of less demand. Many eyecare professionals have either lost or are losing staff members during the pandemic—either voluntarily or not—and are still struggling to rebuild. Many ECPs also agree that their current team members—and they themselves—are struggling with work-life balance, stress, and mental health issues.



According to the World Health Organization (WHO), global presence of anxiety and depression increased 25% during the first year of the pandemic alone. The WHO research identified multiple stress factors, including loneliness, fear of infection, suffering a death or serious illness (for themselves or a loved one), and financial burdens—all of which contributed to increased anxiety and depression. Among health workers, mental health issues have been of heightened concern—and exhaustion remains a major trigger of suicidal thinking.^{xiv}

“ We’ve seen mental health challenges among both staff and doctors. We’re now more attuned to culture and ways to be more receptive to meeting employee and staff needs—and we are planning to take greater action. —Trevor Miranda, OD ”

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At the end of the day, we're all human beings and whether it's employee trainings, incentives or overall business strategy, we need to take on a more empathetic and inclusive management style. Addressing concerns—ranging from mental health issues and burnout to overall safety—is critical so that our team and our patients feel secure and engaged.

—Vincent Young, MD

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Our experts cite simple, yet effective, ways to build a positive culture. Increased awareness is the first step. This means understanding the challenges that individuals may be experiencing at home and collaborating to discuss solutions that may help. When it comes to managing stress, some ECPs have changed the structure of their office hours to continue with the pandemic-era “appointment-only” schedule.

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Both my patients and staff prefer the eyecare consultation by appointment. We can give personalized uninterrupted attention to each patient and our staff is able to focus on providing the best care, one-by-one.

—Rachel Hill, Optician

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Other steps that ECPs can take to help promote employee engagement and satisfaction include:

- 01 **Acknowledging** burnout and mental health struggles as a real issue and offering programs to address these issues.
- 02 **Promoting** a people-first environment and engaging in activities that put a spotlight or recognition on team members going above and beyond.
- 03 **Promoting** a work-life balance and leading by example when it comes to expectations and boundaries.
- 04 **Ensuring** employees have access to and knowledge of resources available to them.



TREND:

Eyecare professionals who previously took a patient-first approach now need to find ways to broaden this to a people-first approach to balance with employee needs. Ensuring an engaged team—through things like increased recognition, professional development opportunities and work-life balance—will best serve patients and employees alike.



03

FOCUS ON COMMUNITY: MAKING A DIFFERENCE HYPERLOCALLY

Research suggests that the pandemic has increased overall generosity among people.^{xv} It is conceivable to also think that while each of our individual worlds narrowed throughout quarantine and the after-effects, there also was an increased focus on the community directly around us—in our backyards, where we live.

Following the start of the global pandemic, research has found that half of wealthy households making donations in 2020 did so in direct response to the pandemic. Approximately 90% of affluent Americans gave to charitable causes in 2020, with one-third giving more than they did in the past to organizations focused on meeting basic needs. Additionally, the research found that there was an increased focus on the needs of the donors' local communities.^{xvi} In Canada, an IPSOS survey revealed that an increasing number of Canadians (22%) are relying on local charities to meet essential needs—making local giving more important than ever before. While giving overall has scaled back due to economic concerns, the sense of community remains strong.^{xvii}

Eyecare professionals have reported that both patients and staff have shown increased interest in giving back—and that they are taking a more active role in participating in community activities.

This can look different in every community. In some cases, ECPs have reported joining community food drives, partnering with local charities to provide free eye exams, or joining educational efforts surrounding health care. ECPs agree that there are multiple benefits when it comes to actively giving back or volunteering within local communities.

“ Not only is it a great way to help out our own local communities, but it’s also a way to create increased brand awareness for practices, while engaging staff in a worthwhile cause.

—Trevor Miranda, OD

In most cases, this “giving back” movement has also led to an increased focus on diversity, equity, and inclusion. ECPs have shared examples of their efforts to increase their staff diversity, to provide better resources to patients of diverse backgrounds, and to update their training and educational resources for staff to ensure a more inclusive environment within the office.

“ Beyond our own backyards, it’s extremely rewarding for ECPs to get involved with third-party organizations or other companies to reach specific groups or underserved communities with information about and access to eye care. Over the years, I’ve done everything from participating in mobile clinics to provide eye exams and glasses to those in need, to speaking at events supported by organizations, such as the National Council of Negro Women’s “Black Family Reunion,” to reach those disproportionately affected by eye disease. Everyone we connect with is grateful—and that by itself is fulfilling.

—Vincent Young, MD



TREND:

Community is here to stay. Eyecare professionals who lean into both physical and virtual ways to engage with influential groups within their own communities—whether hyperlocal or related to a specific demographic group or cause—will further business goals while building a stronger internal team culture.



04

KEEP AN EYE ON A SUSTAINABLE FUTURE: OFFERING PRODUCTS TO MEET DEMANDS HYPERLOCALLY

The concept of sustainability—and subsequent actions to ensure a more sustainable future—has become an important focus for consumers in recent years. This is especially the case among millennials and younger consumers, who recognize the impact of their purchasing behavior on the planet. Today’s consumers expect both sustainable products and a sustainable shopping experience—and while they may be more apt to shop locally, they are researching their purchasing decisions online beforehand.^{xviii}

Beyond this, research has shown that today’s consumers are willing to pay more for sustainable products—a desire that is increasing in today’s current environment. Consider that two years ago, 58% of consumers across all generations were willing to spend more if it meant supporting sustainable options. Today, that number is even higher—with 90% of Gen X consumers saying they would be willing to spend more for sustainable products, compared to just over 34% two years ago.^{xix}

Options abound. Most frame manufacturers are now touting the sustainable aspects of their manufacturing processes and product materials. This includes everyone from eco-friendly frame brands—like Eco Eyewear, Sea2See, MITA and Genusee—to industry leaders, like Johnson & Johnson Vision’s efforts to reduce waste in manufacturing and through its ACUVUE® OASYS contact lens packaging.

Beyond this, companies are communicating broadly about their initiatives to reduce carbon emissions and meet Sustainable Development Goals. Consider EssilorLuxottica’s “Eyes on the Planet” initiative, which incorporates five key pillars for sustainability, including reducing the company’s carbon footprint; focusing on using recycled materials; eliminating poor vision by 2050 by making eyecare accessible for all; initiatives to eliminate unconscious bias; and increased inclusion and a commitment to ethical business practices.

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Our patients actively ask for frames that are Canadian-made or owned—and for products made with recycled materials. Sometimes the sustainability factor can make the difference at their final decision point.

—Wael Yassin, Optician

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Eyecare professionals are recognizing the sustainability trend and are bringing more awareness to the sustainable options they offer to provide more desirable options to patient groups seeking these products—and help the environment while doing it!

TREND:

Patients prioritize sustainability in a big way—and they are willing to pay for it. ECPs are well-served to think broadly about what sustainability means to patients and build communication initiatives and programs around it.





05

EMBRACE A HYBRID APPROACH: CONNECTING WITH PATIENTS ONLINE AND OFF

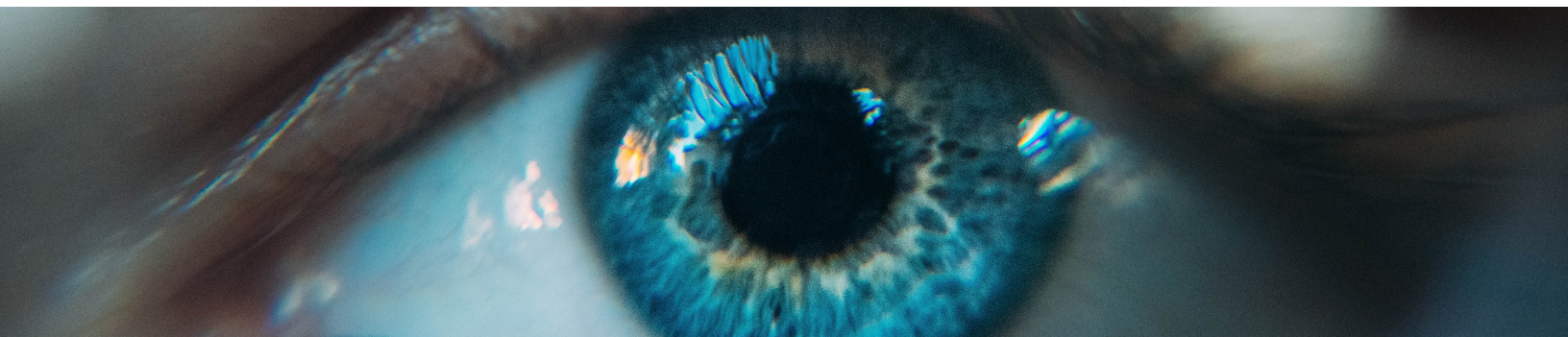
Another lasting impact from the pandemic is the semi-permanent merging of our home and “outside” lives. Today’s patients are embracing a hybrid approach when it comes to everything from work to health and fitness, to shopping, to finances and more. Retailers and healthcare professionals have experienced this impact with an updated consumer approach to researching and purchasing products and services.

As the pandemic began, many medical providers shifted to telemedicine for appointments that could be managed that way, including pre- and post-op and simple ailments. While many initially found the process daunting, this change brought more efficiency for providers and has even helped to remove some stressors for patients. Even as pandemic restrictions lessened, many health professionals chose to keep telehealth options available, as it makes sense, while still encouraging in-person appointments when needed.

A McKinsey survey found that by May 2021, 88% of consumers had used telehealth services during the pandemic. Reasons for choosing telehealth included convenience and satisfaction with their experience—with 40% of consumers saying they will continue to use telehealth after the pandemic and 63% saying they are interested in broader digital health solutions, such as online scheduling and virtual-first health plans.^{xx} Additional studies showed the effectiveness of telehealth, when

needed—with optometrists rapidly embracing telehealth to deliver eyecare during the pandemic. ECPs reported that most eye issues were able to be addressed through telehealth, with urgent eye problems triaged and referred to the optometry clinic, when appropriate.^{xxi}

When it comes to eyewear selection, retailers have worked hard to replicate in-store experiences by offering at-home, try-on tools—with some even using artificial intelligence, virtual reality, and avatars—for consumers researching and shopping at home. In store, consumers are expecting more comfortable environments that enhance their shopping experience while making it easier. ECPs have innovated here too—using virtual try-on tools, like “Transitions Virtual Try On,” which allows patients to see themselves with different lens and frame options—and through optical retail experiences that allow for the personalization features that consumers have come to appreciate online.



And in today's pandemic environment, being able to offer more to appeal to a broader and more diverse patient base is crucial. In 2020, ecommerce retail trade sales in Canada reached an all-time high of \$3.82 billion—and by 2025, 78% of Canadians will be ecommerce users. But while the pandemic shifted shopping habits, consumers were already in the process of moving online for many purchases. According to the Vision Council, 22% of adults who purchased eyeglasses used the internet in the process of buying prescription glasses in 2017. By 2020, this percentage had doubled to 44%, with adults buying—or at least browsing—online for their eyewear.^{xxii}

“ It’s all about offering that balance between a good online and in-person experience for our patients. We have everything online—and patients look at it there and are engaged—but they still also want to see the products in the store. —Camelia Hammiche, Optician ”

“ The way our patients are shopping online is changing. They can’t get the same immediate gratification always online because of inventory—but they can come to see us in person after doing their research and purchase the pair of lenses and frames that they saw and fell in love with online. —Trisha Beal, OD ”

“ The most important thing is that the customer will gain trust and confidence by our attitude, knowledge and service. —Raouf Hakim, Optician ”

TREND:

A blended approach to providing eye care and eyewear is here to stay. Innovations that allow eyecare professionals to blend the patient experience—being with them every step of the way, from when they are first researching online to when they are trying on products in store—are creating the personalized experience patients crave and need, building a stronger internal team culture.



FOOTNOTES

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