

2017-2018 Retail Price Report



WALMAN
OPTICAL

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REPORT SUMMARY

The data collected in the 2017-2018 Retail Price Survey have been analyzed and divided into four sections by region (West, West Central, East Central, East), then by population (Major Urban City, Suburb of Major City, or Rural Town), and by average patient age (21-35, 36-50, >50).

The resulting information displays not only the average price, but also pricing trends to give a clearer overall understanding of contributing factors that can impact pricing choices. The legend on page 5 will help you read your report, and use the data to your best advantage.

There were several significant national trends, especially in comparison to the 2015-2016 survey. Costs of a routine eye exam went up an average of \$5.00, but the average price of a contact lens evaluation dropped by \$10.00. The average number of patients a doctor sees in a day went from 14.3 to 16.8, an increase of 2.5 patients per day.

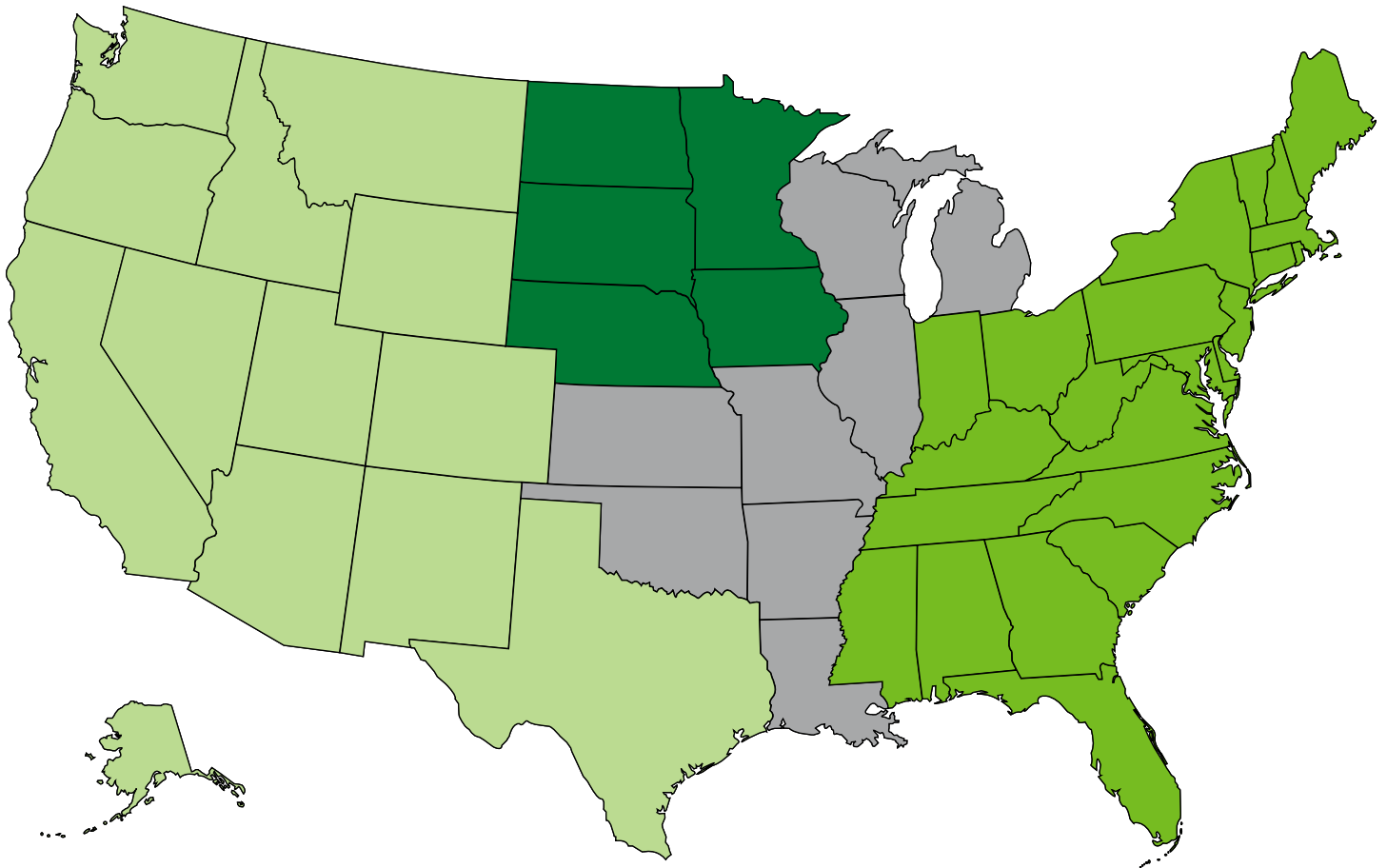
The average discount offered to non-insured patients increased by nearly 6%, and the average frame price increased in every region, by about \$8.00. While average markups for non-glare, photochromics, and digital PALs increased from 2015-2016 to 2017-2018, the markup for single vision lenses actually decreased by an average of 18%.

The percentage of respondents (45%) that stated that they always package offerings together for competitive pricing stayed the same, however an increase of 12% of respondents reported that they sometimes offer packages.

DISCLAIMER

The information provided in this report is the result of responses provided by individuals completing the 2017-2018 Retail Price Survey conducted by Walman Optical in Autumn 2017, and does not reflect pricing suggestions or recommendations by Walman Optical. Average patient age (21-35, 36-50, over 50) and area demographic (Major Urban City, Suburb of Major City, Rural Town) were self-reported by respondents. Region (West, West Central, East Central, East) was divided based on geographic location and volume of respondents.

REGIONAL BREAKOUT



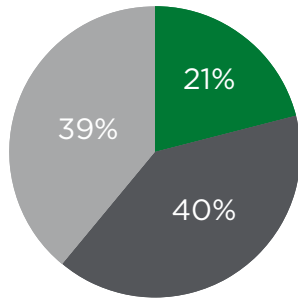
 **WEST**

 **EAST CENTRAL**

 **WEST CENTRAL**

 **EAST**

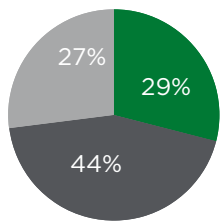
NATIONAL DEMOGRAPHICS



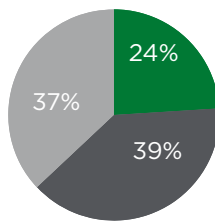
NATIONAL

CITY SIZE

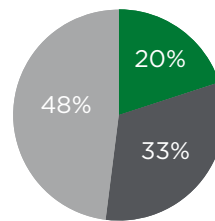
- MAJOR URBAN CITY
- SUBURB OF MAJOR CITY
- RURAL TOWN



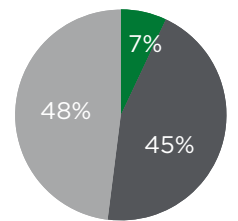
WEST



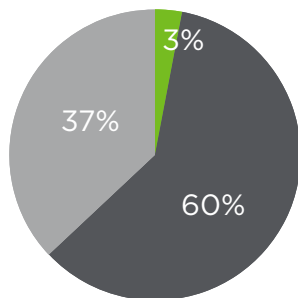
WEST CENTRAL



EAST CENTRAL



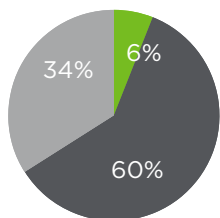
EAST



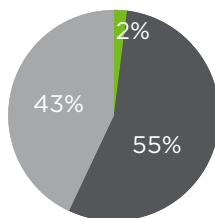
NATIONAL

AVERAGE PATIENT AGE

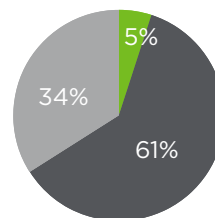
- 21-35
- 36-50
- OVER 50



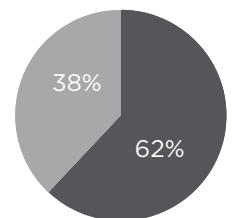
WEST



WEST CENTRAL



EAST CENTRAL

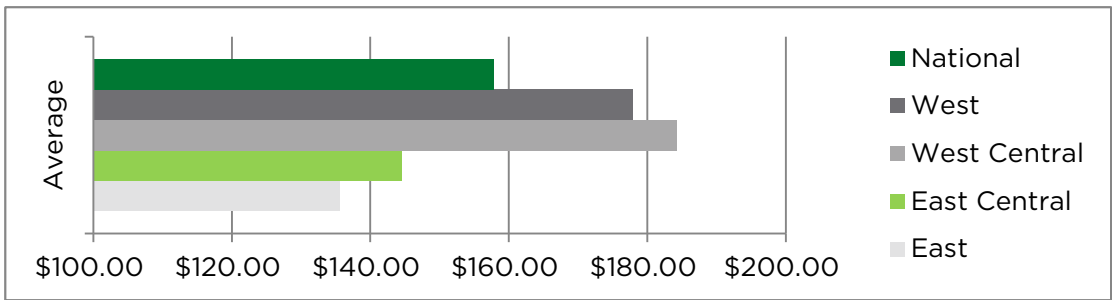


EAST

READING YOUR REPORT

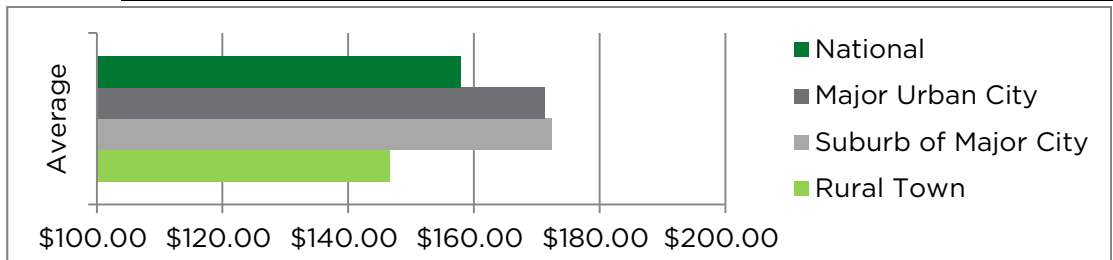
National vs. Regional comparison

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	16%	50%	22%	9%	3%	\$157.81
West	14%	40%	25%	15%	6%	\$177.98
West Central	8%	39%	31%	16%	6%	\$184.29
East Central	21%	51.5%	22.5%	5%	0%	\$144.50
East	14%	70%	14%	2%	0%	\$135.66



BY CITY SIZE

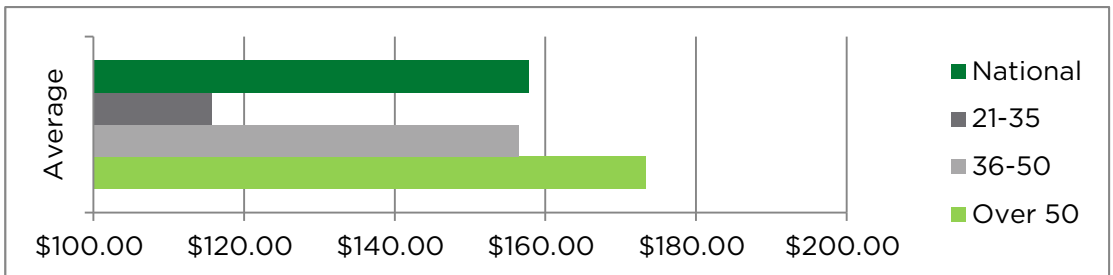
	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	16%	50%	22%	9%	3%	\$157.81
Major Urban City	11%	45%	24%	16%	4%	\$171.32
Suburb of Major City	10%	45%	28%	12%	5%	\$172.31
Rural Town	21%	54%	19%	4%	2%	\$146.50



Average price for respondents in major urban areas

BY AVERAGE PATIENT AGE

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	16%	50%	22%	9%	3%	\$157.81
21-35	57%	14%	29%	0%	0%	\$115.73
36-50	11%	58%	20%	10%	1%	\$156.53
Over 50	17%	36%	29%	11%	7%	\$173.32



For each demographic, the category with the largest percentage of respondents is highlighted

How much do you bill (in-network) insurance providers for a routine eye exam?

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	16%	50%	22%	9%	3%	\$157.81
West	14%	40%	25%	15%	6%	\$177.98
West Central	8%	39%	31%	16%	6%	\$184.29
East Central	21%	51.5%	22.5%	5%	0%	\$144.50
East	14%	70%	14%	2%	0%	\$135.66



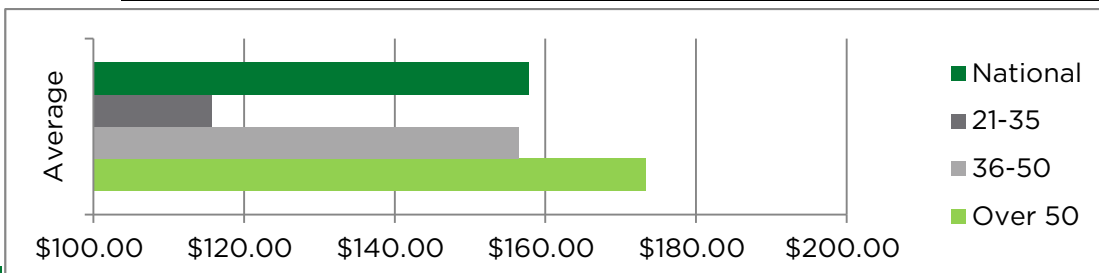
BY CITY SIZE

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	16%	50%	22%	9%	3%	\$157.81
Major Urban City	11%	45%	24%	16%	4%	\$171.32
Suburb of Major City	10%	45%	28%	12%	5%	\$172.31
Rural Town	21%	54%	19%	4%	2%	\$146.50



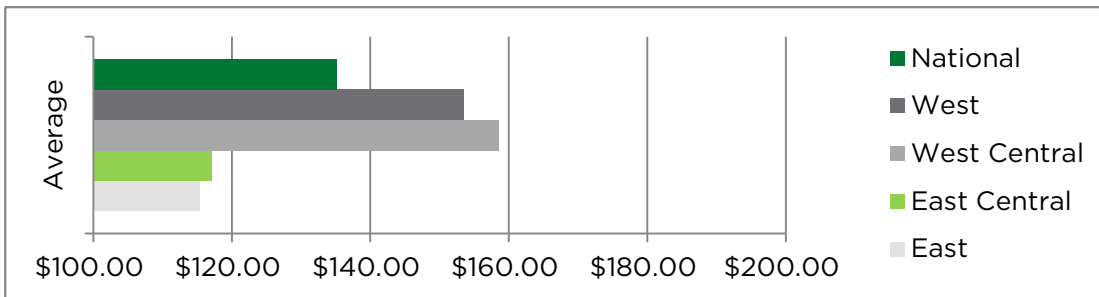
BY AVERAGE PATIENT AGE

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	16%	50%	22%	9%	3%	\$157.81
21-35	57%	14%	29%	0%	0%	\$115.73
36-50	11%	58%	20%	10%	1%	\$156.53
Over 50	17%	36%	29%	11%	7%	\$173.32



How much do you bill non-insured patients for a routine eye exam?

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	32%	49%	12%	5%	2%	\$135.22
West	29%	44%	13%	10%	4%	\$153.58
West Central	17%	49%	23%	5%	6%	\$158.57
East Central	47%	42%	8%	3%	0%	\$117.17
East	38%	59%	3%	0%	0%	\$115.39



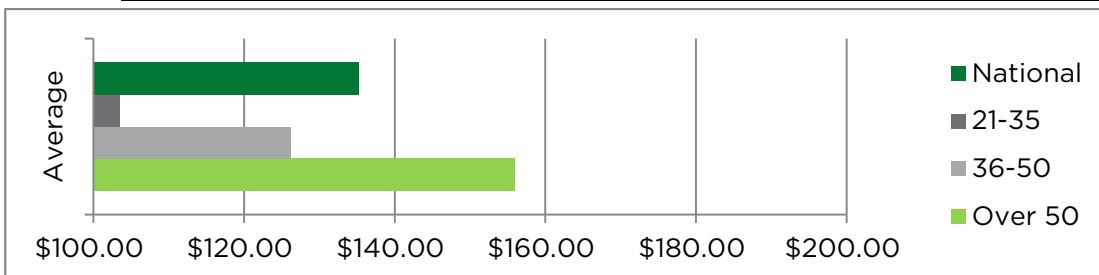
BY CITY SIZE

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	32%	49%	12%	5%	2%	\$135.22
Major Urban City	24%	45%	16%	11%	4%	\$157.06
Suburb of Major City	28%	56%	11%	2.5%	2.5%	\$136.32
Rural Town	43%	41%	10.5%	3.5%	2%	\$127.21



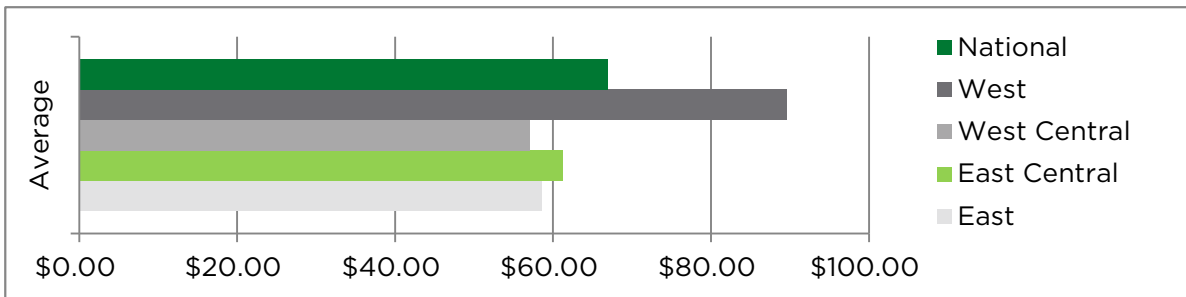
BY AVERAGE PATIENT AGE

	\$20-100	\$101-165	\$166-230	\$231-295	\$296+	Average
National	32%	49%	12%	5%	2%	\$135.22
21-35	71%	29%	0%	0%	0%	\$103.57
36-50	37%	51%	8%	3%	1%	\$126.22
Over 50	25%	44%	18%	7%	6%	\$155.93



How much do you charge for your contact lens evaluation?

	\$0-35	\$36-70	\$71-105	\$106-140	\$141-175	\$176+	Average
National	16%	48%	26%	6%	1%	3%	\$66.99
West	11%	36%	30%	11%	1%	11%	\$89.60
West Central	21.5%	51%	23%	3%	1.5%	0%	\$57.08
East Central	18%	50%	25%	7%	0%	0%	\$61.24
East	13%	64%	18%	5%	0%	0%	\$58.54



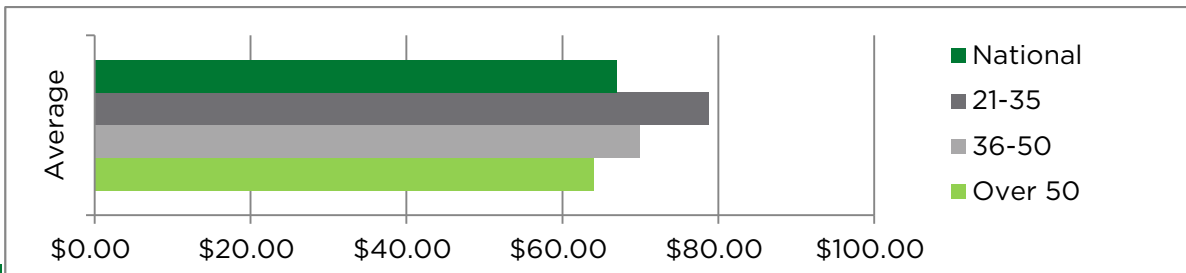
BY CITY SIZE

	\$0-35	\$36-70	\$71-105	\$106-140	\$141-175	\$176+	Average
National	16%	48%	26%	6%	1%	3%	\$66.99
Major Urban City	14%	55%	20%	5%	2%	4%	\$68.12
Suburb of Major City	8%	49.5%	27.5%	9%	1%	5%	\$76.24
Rural Town	24%	45%	24%	5%	0%	2%	\$59.97



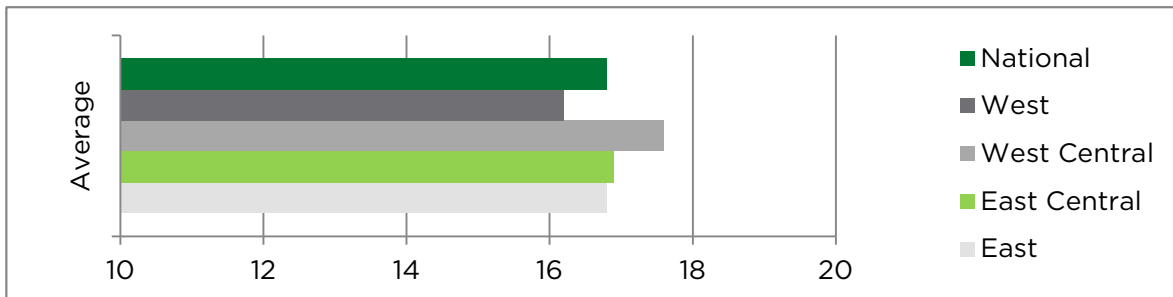
BY AVERAGE PATIENT AGE

	\$0-35	\$36-70	\$71-105	\$106-140	\$141-175	\$176+	Average
National	16%	48%	26%	6%	1%	3%	\$66.99
21-35	0%	50%	37.5%	12.5%	0%	0%	\$78.75
36-50	13%	51%	26%	6%	1%	3%	\$69.91
Over 50	21.5%	45%	20.5%	9%	0%	4%	\$63.99



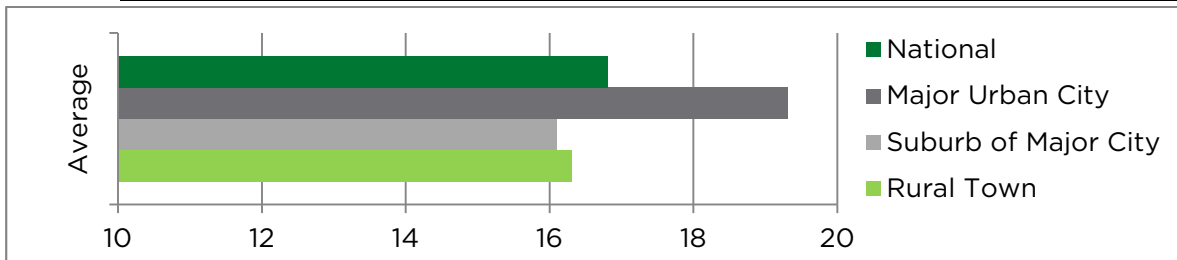
How many appointments do your doctors see each day (per doctor)?

	1-7 Appts	8-14 Appts	15-21 Appts	22-28 Appts	29+ Appts	Average
National	7%	39%	37%	6%	11%	16.8
West	6%	43%	35%	6%	10%	16.2
West Central	9%	31%	39%	9%	12%	17.6
East Central	8%	41%	33%	6%	12%	16.9
East	2%	39%	44%	3%	12%	16.8



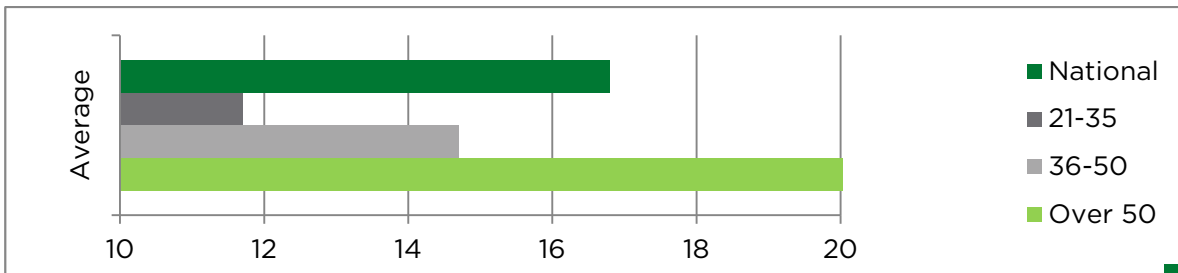
BY CITY SIZE

	1-7 Appts	8-14 Appts	15-21 Appts	22-28 Appts	29+ Appts	Average
National	7%	39%	37%	6%	11%	16.8
Major Urban City	5%	27%	45%	9%	14%	19.3
Suburb of Major City	9%	40%	33%	7%	11%	16.1
Rural Town	4%	43%	38%	4%	11%	16.3



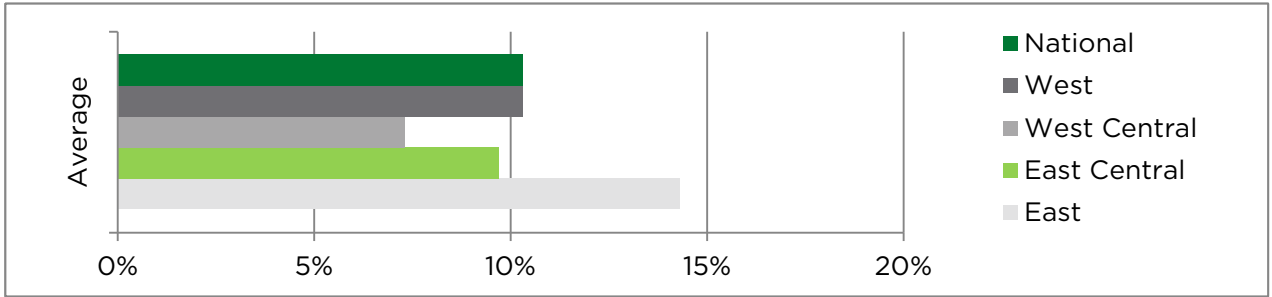
BY AVERAGE PATIENT AGE

	1-7 Appts	8-14 Appts	15-21 Appts	22-28 Appts	29+ Appts	Average
National	7%	39%	37%	6%	11%	16.8
21-35	12.5%	75%	12.5%	0%	0%	11.7
36-50	8%	45%	37%	6%	4%	14.7
Over 50	4%	24.5%	40%	7%	24.5%	20.8



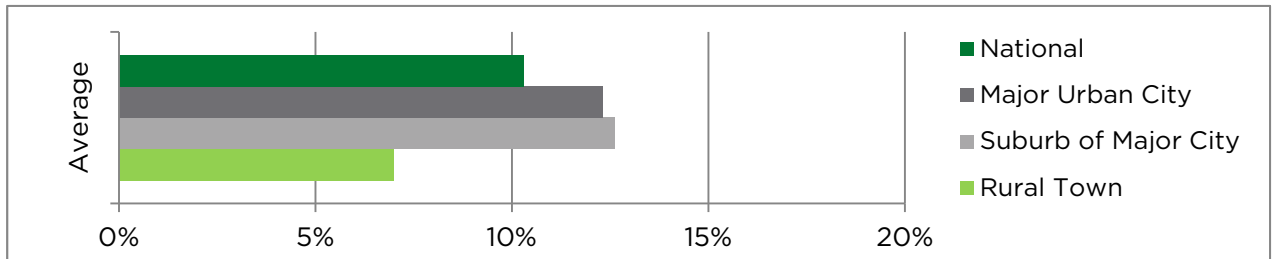
What percent cash discount do you offer non-insured patients on eyewear?

	Non-Percentage Discount*	No Discount	1-10%	11-20%	21-40%	Average
National	17%	32%	15%	28%	8%	10.3%
West	18%	36%	5%	38%	3%	10.3%
West Central	14%	43%	22%	16%	5%	7.3%
East Central	16%	31%	21%	28%	4%	9.7%
East	26%	17%	9%	37%	11%	14.3%



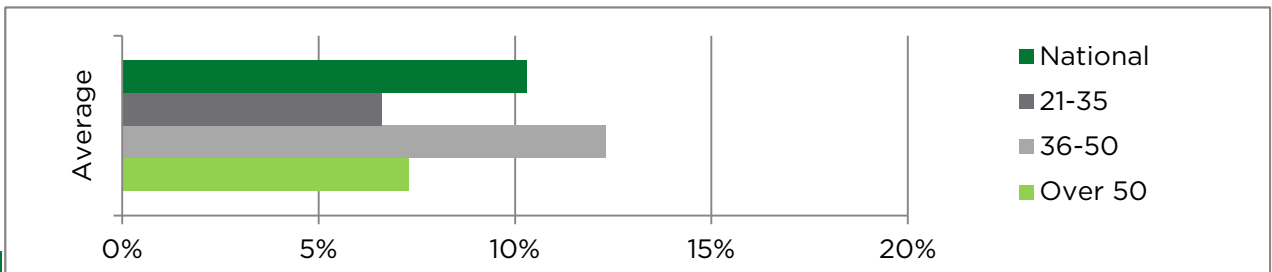
BY CITY SIZE

	Non-Percentage Discount	No Discount	1-10%	11-20%	21-40%	Average
National	17%	32%	15%	28%	8%	10.3%
Major Urban City	13%	27%	15%	33%	12%	12.3%
Suburb of Major City	22.5%	24.5%	9%	38%	6%	12.6%
Rural Town	16%	42%	18%	22%	2%	7%



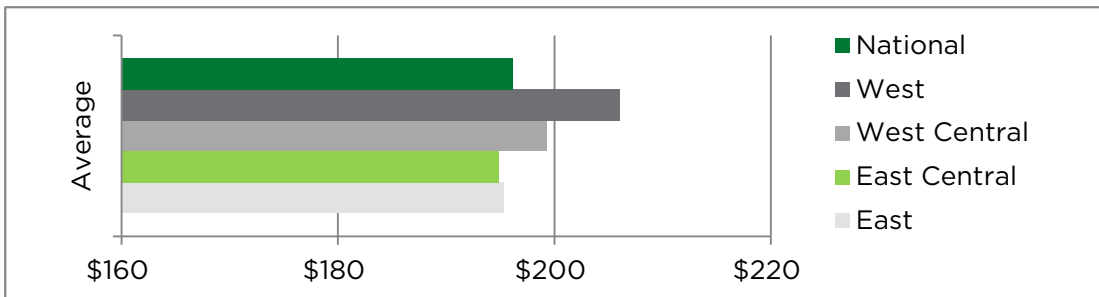
BY AVERAGE PATIENT AGE

	Non-Percentage Discount	No Discount	1-10%	11-20%	21-40%	Average
National	17%	32%	15%	28%	8%	10.3%
21-35	0%	56%	11%	33%	0%	6.6%
36-50	19.5%	23%	16%	34.5%	7%	12.3%
Over 50	17%	45%	13%	22%	3%	7.3%



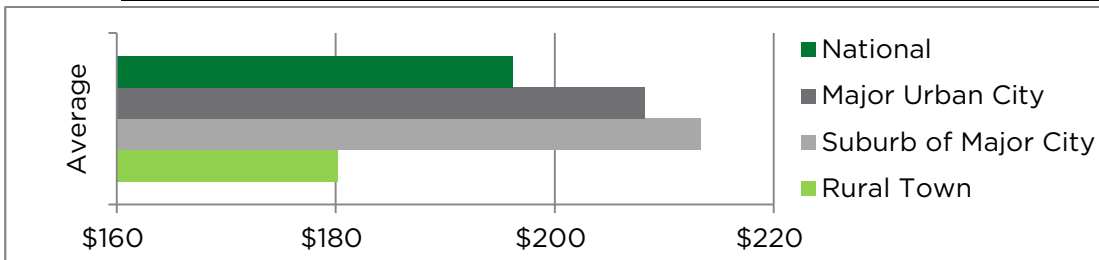
What is your average frame price?

	\$100-130	\$131-170	\$171-210	\$211-250	\$251-550	Average
National	2%	30%	43%	17%	8%	\$196.14
West	1%	22%	47%	18%	12%	\$206.02
West Central	0%	34%	33%	21%	12%	\$199.31
East Central	1%	29%	53%	11%	6%	\$194.83
East	3%	21%	45%	26%	5%	\$195.36



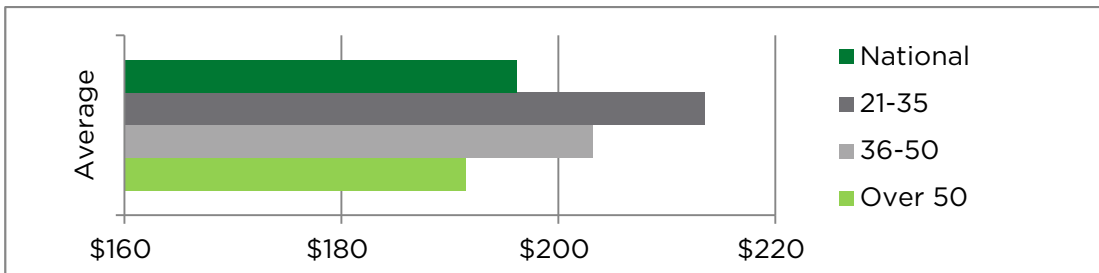
BY CITY SIZE

	\$100-130	\$131-170	\$171-210	\$211-250	\$251-550	Average
National	2%	30%	43%	17%	8%	\$196.14
Major Urban City	2%	28%	36%	18%	16%	\$208.25
Suburb of Major City	1%	11.5%	51%	25%	11.5%	\$213.36
Rural Town	2%	41%	43%	11%	3%	\$180.21



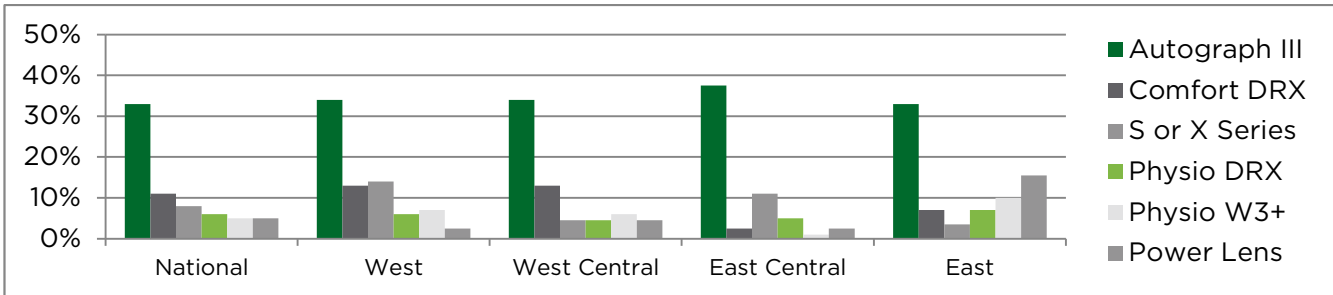
BY AVERAGE PATIENT AGE

	\$100-130	\$131-170	\$171-210	\$211-250	\$251-550	Average
National	2%	30%	43%	17%	8%	\$196.14
21-35	0%	20%	50%	10%	20%	\$213.50
36-50	1%	24%	46%	18%	11%	\$203.21
Over 50	2%	32%	42%	13%	11%	\$191.52



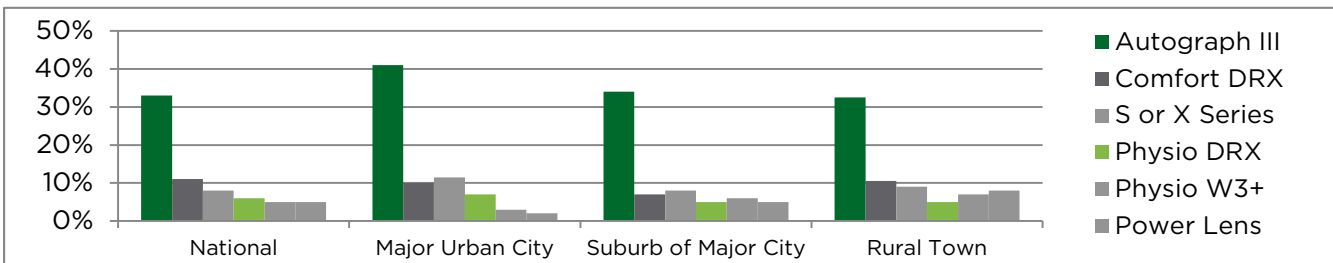
What does your office sell as its digital progressive lens design of choice?

	Autograph III	Comfort DRX	S or X Series	Physio DRX	Physio W3+	Power Lens
National	33%	11%	8%	6%	5%	5%
West	34%	13%	14%	6%	7%	2.5%
West Central	34%	13%	4.5%	4.5%	6%	4.5%
East Central	37.5%	2.5%	11%	5%	1%	2.5%
East	33%	7%	3.5%	7%	10%	15.5%



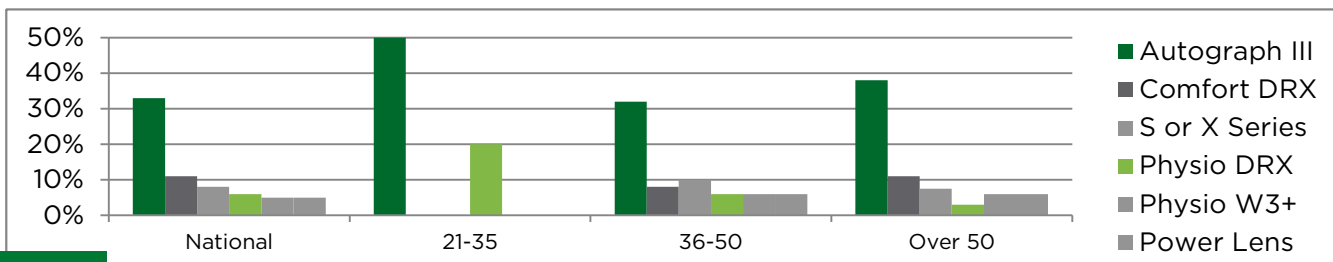
BY CITY SIZE

	Autograph III	Comfort DRX	S or X Series	Physio DRX	Physio W3+	Power Lens
National	33%	11%	8%	6%	5%	5%
Major Urban City	41%	10%	11.5%	7%	3%	2%
Suburb of Major City	34%	7%	8%	5%	6%	5%
Rural Town	32.5%	10.5%	9%	5%	7%	8%



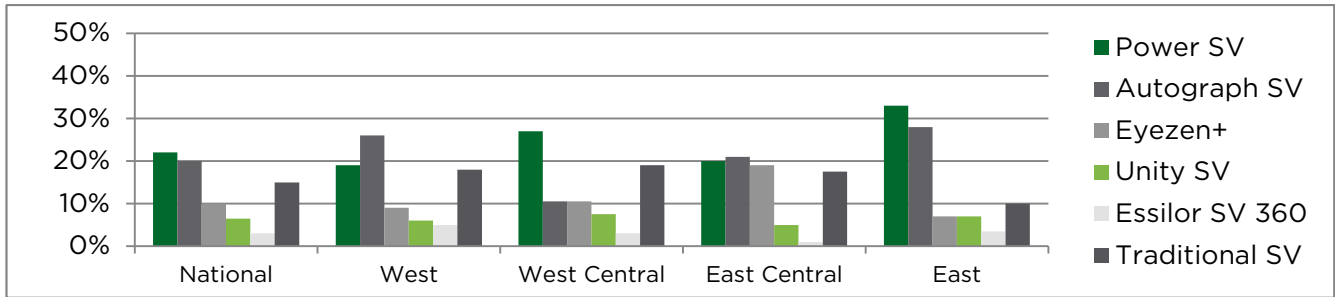
BY AVERAGE PATIENT AGE

	Autograph III	Comfort DRX	S or X Series	Physio DRX	Physio W3+	Power Lens
National	33%	11%	8%	6%	5%	5%
21-35	50%	0%	0%	20%	0%	0%
36-50	32%	8%	10%	6%	6%	6%
Over 50	38%	11%	7.5%	3%	6%	6%



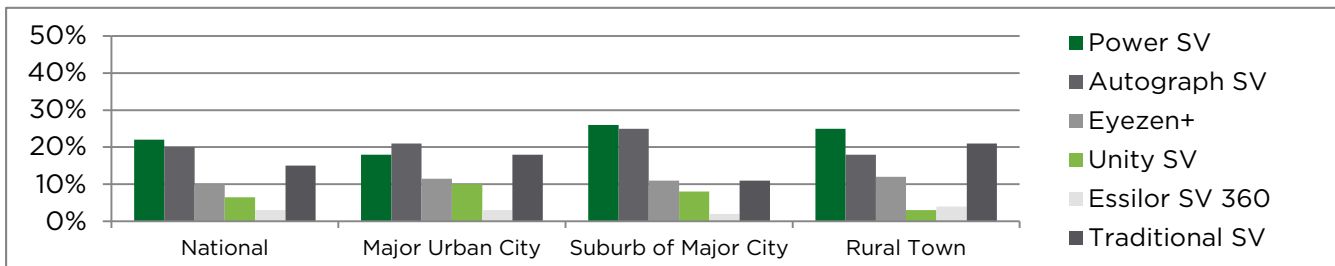
What does your office sell as its single vision lens design of choice?

	Power SV	Autograph SV	Eyezen+	Unity SV	Essilor SV 360	Traditional SV
National	22%	20%	10%	6.5%	3%	15%
West	19%	26%	9%	6%	5%	18%
West Central	27%	10.5%	10.5%	7.5%	3%	19%
East Central	20%	21%	19%	5%	1%	17.5%
East	33%	28%	7%	7%	3.5%	10%



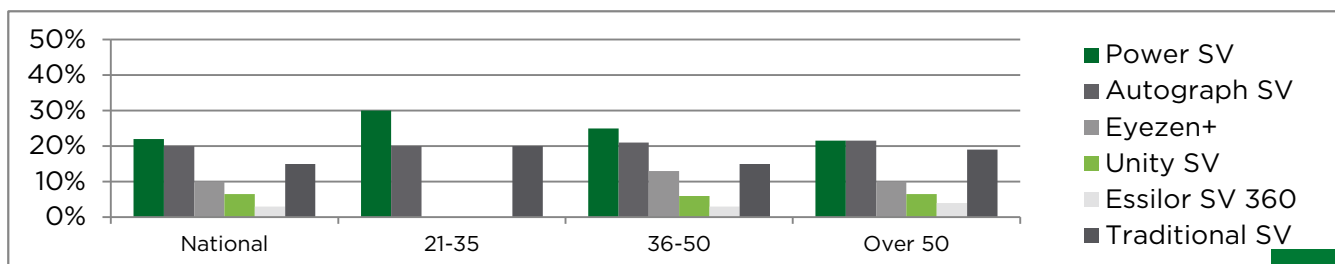
BY CITY SIZE

	Power SV	Autograph SV	Eyezen+	Unity SV	Essilor SV 360	Traditional SV
National	22%	20%	10%	6.5%	3%	15%
Major Urban City	18%	21%	11.5%	10%	3%	18%
Suburb of Major City	26%	25%	11%	8%	2%	11%
Rural Town	25%	18%	12%	3%	4%	21%



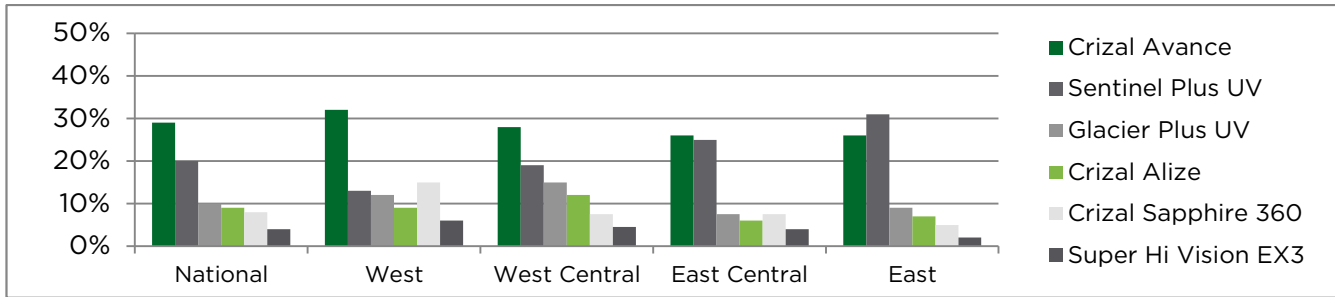
BY AVERAGE PATIENT AGE

	Power SV	Autograph SV	Eyezen+	Unity SV	Essilor SV 360	Traditional SV
National	22%	20%	10%	6.5%	3%	15%
21-35	30%	20%	0%	0%	0%	20%
36-50	25%	21%	13%	6%	3%	15%
Over 50	21.5%	21.5%	10%	6.5%	4%	19%



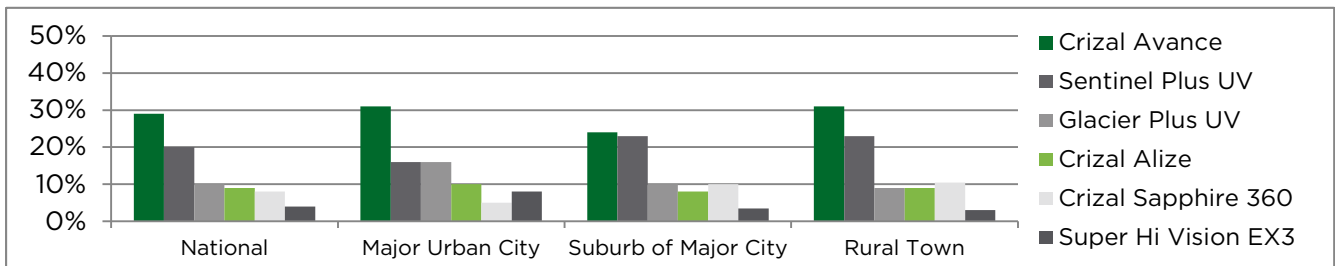
What does your office sell as its non-glare coating of choice?

	Crizal Avance	Sentinel Plus UV	Glacier Plus UV	Crizal Alize	Crizal Sapphire	Super Hi Vision EX3
National	29%	20%	10%	9%	8%	4%
West	32%	13%	12%	9%	15%	6%
West Central	28%	19%	15%	12%	7.5%	4.5%
East Central	26%	25%	7.5%	6%	7.5%	4%
East	26%	31%	9%	7%	5%	2%



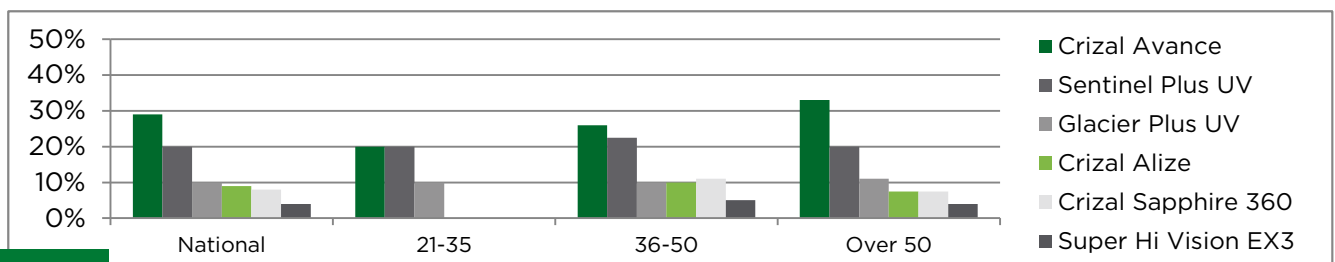
BY CITY SIZE

	Crizal Avance	Sentinel Plus UV	Glacier Plus UV	Crizal Alize	Crizal Sapphire 360	Super Hi Vision EX3
National	29%	20%	10%	9%	8%	4%
Major Urban City	31%	16%	16%	10%	5%	8%
Suburb of Major City	24%	23%	10%	8%	10%	3.5%
Rural Town	31%	23%	9%	9%	10.5%	3%



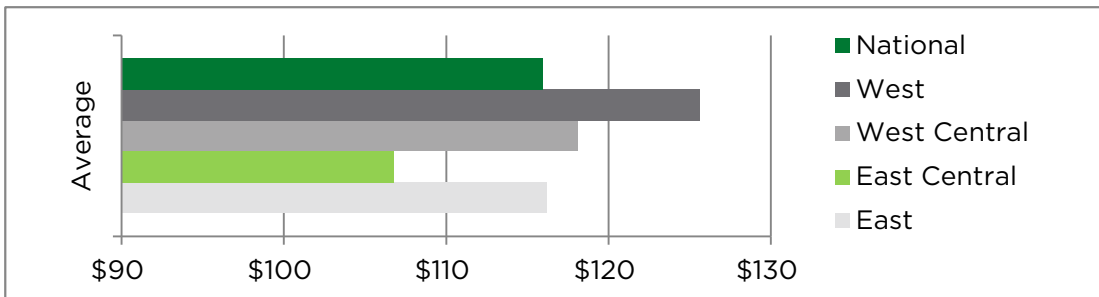
BY AVERAGE PATIENT AGE

	Crizal Avance	Sentinel Plus UV	Glacier Plus UV	Crizal Alize	Crizal Sapphire 360	Super Hi Vision EX3
National	29%	20%	10%	9%	8%	4%
21-35	20%	20%	10%	0%	0%	0%
36-50	26%	22.5%	10%	10%	11%	5%
Over 50	33%	20%	11%	7.5%	7.5%	4%



What is your standard add-on price for non-glare?

	\$40-75	\$76-100	\$101-125	\$126-150	\$151-216	Average
National	9%	26%	33%	25%	7%	\$115.93
West	7%	18%	27%	30%	18%	\$125.64
West Central	6%	21%	34%	34%	5%	\$118.12
East Central	14%	34%	34%	17%	1%	\$106.78
East	3.5%	31%	36%	22.5%	7%	\$116.19



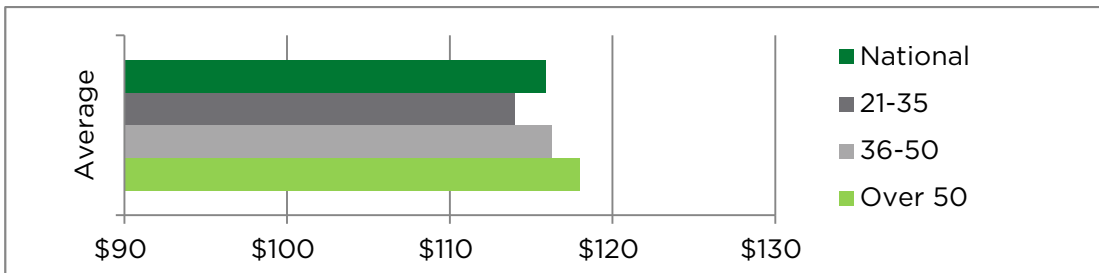
BY CITY SIZE

	\$40-75	\$76-100	\$101-125	\$126-150	\$151-216	Average
National	9%	26%	33%	25%	7%	\$115.93
Major Urban City	6.5%	18%	29.5%	26%	20%	\$125.00
Suburb of Major City	12%	21%	29%	30%	8%	\$116.48
Rural Town	4.5%	34.5%	38%	21%	2%	\$112.74



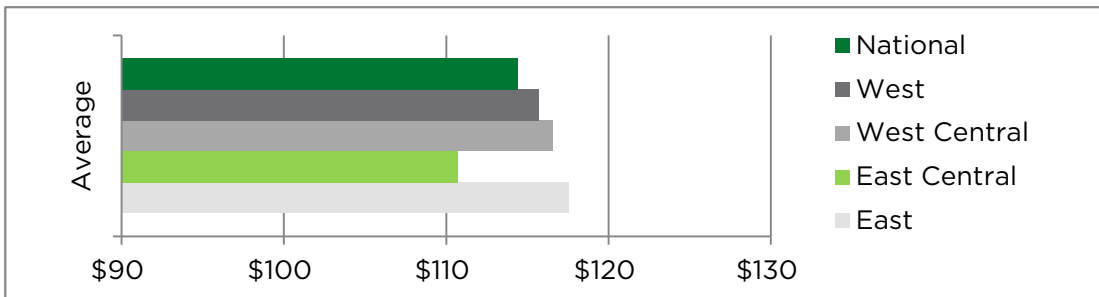
BY AVERAGE PATIENT AGE

	\$40-75	\$76-100	\$101-125	\$126-150	\$151-216	Average
National	9%	26%	33%	25%	7%	\$115.93
21-35	10%	30%	30%	30%	0%	\$114.00
36-50	10%	25%	33%	24%	8%	\$116.26
Over 50	5%	26.5%	33%	27%	8.5%	\$117.98



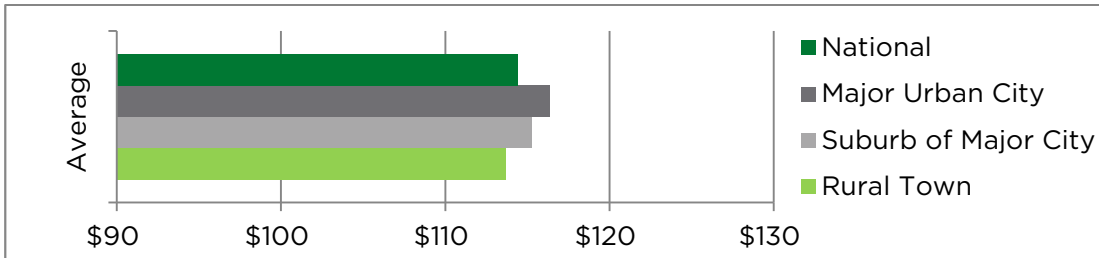
What is your standard add-on price for Transitions® Signature lenses?

	\$45-75	\$76-100	\$101-125	\$126-150	\$151-349	Average
National	3%	31%	46%	16%	4%	\$114.43
West	6%	22%	50%	20%	2%	\$115.68
West Central	6%	35%	38%	14%	7%	\$116.58
East Central	3%	36%	46%	14%	1%	\$110.74
East	0%	29%	45%	21%	5%	\$117.55



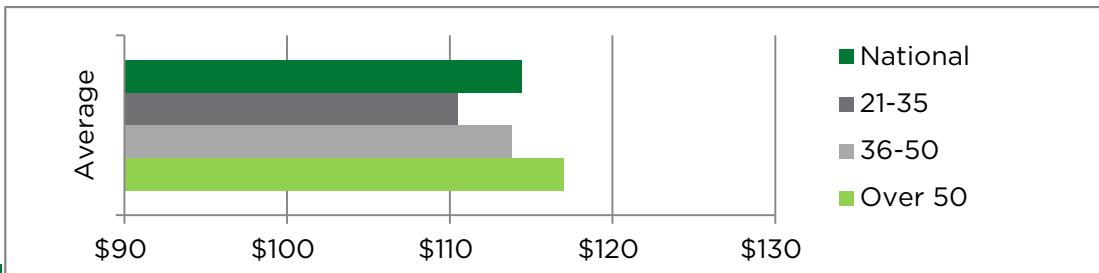
BY CITY SIZE

	\$45-75	\$76-100	\$101-125	\$126-150	\$151-349	Average
National	3%	31%	46%	16%	4%	\$114.43
Major Urban City	5%	33%	34%	23%	5%	\$116.39
Suburb of Major City	3%	27%	50%	16%	4%	\$115.29
Rural Town	4%	32%	46%	15%	3%	\$113.69



BY AVERAGE PATIENT AGE

	\$45-75	\$76-100	\$101-125	\$126-150	\$151-349	Average
National	3%	31%	46%	16%	4%	\$114.43
21-35	10%	30%	50%	10%	0%	\$110.50
36-50	5%	28%	49%	15%	3%	\$113.83
Over 50	2%	34%	38%	21%	5%	\$117.00



What is your standard polycarbonate digital progressive price?

	\$40-200	\$201-300	\$301-400	\$401-500	\$501-600	\$601+	Average
National	9%	14.5%	42.5%	26%	6%	2%	\$364.45
West	8%	12%	37%	30%	9.5%	3.5%	\$382.05
West Central	2%	12%	40%	32%	11%	3%	\$396.71
East Central	6%	15%	47%	26%	3%	3%	\$364.79
East	9%	17%	45%	26%	3%	0%	\$350.66



BY CITY SIZE

	\$40-200	\$201-300	\$301-400	\$401-500	\$501-600	\$601+	Average
National	9%	14.5%	42.5%	26%	6%	2%	\$364.45
Major Urban City	5%	13%	30%	45%	5%	2%	\$386.68
Suburb of Major City	4%	9%	36%	37%	11%	3%	\$402.46
Rural Town	9%	20%	54%	11%	3%	3%	\$338.97



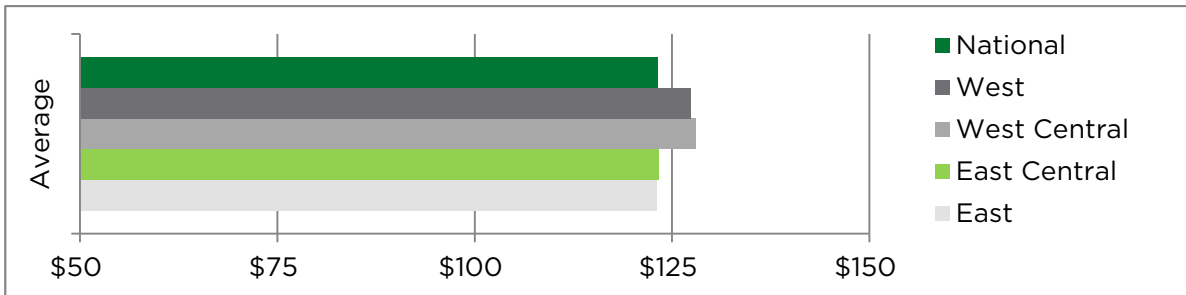
BY AVERAGE PATIENT AGE

	\$40-200	\$201-300	\$301-400	\$401-500	\$501-600	\$601+	Average
National	9%	14.5%	42.5%	26%	6%	2%	\$364.45
21-35	0%	10%	40%	20%	20%	10%	\$439.40
36-50	4%	16%	38%	33%	7%	2%	\$382.05
Over 50	11%	11%	49%	22%	5%	2%	\$355.67



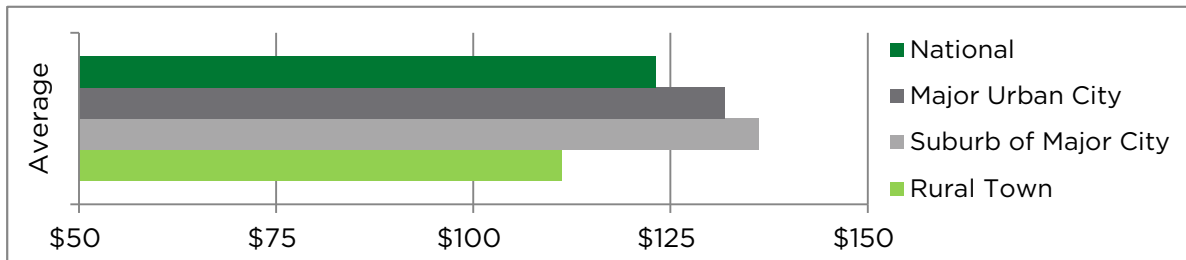
What is your standard polycarbonate single vision price?

	\$20-75	\$76-100	\$101-125	\$126-150	\$151-175	\$176-550	Average
National	13%	13%	28%	29%	11%	6%	\$123.12
West	12%	14%	26%	28%	14%	6%	\$127.36
West Central	6%	12%	33%	29%	11%	9%	\$127.95
East Central	11.5%	11.5%	37%	26%	10%	4%	\$123.28
East	16%	10%	17%	34%	16%	7%	\$123.09



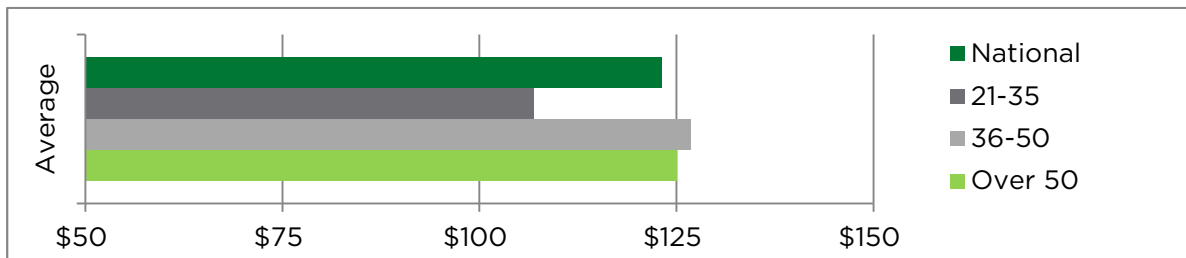
BY CITY SIZE

	\$20-75	\$76-100	\$101-125	\$126-150	\$151-175	\$176-550	Average
National	13%	13%	28%	29%	11%	6%	\$123.12
Major Urban City	5%	6.5%	32%	38%	12%	6.5%	\$131.82
Suburb of Major City	9%	10%	26%	28%	16%	11%	\$136.18
Rural Town	17%	17%	30%	25%	10%	1%	\$111.22



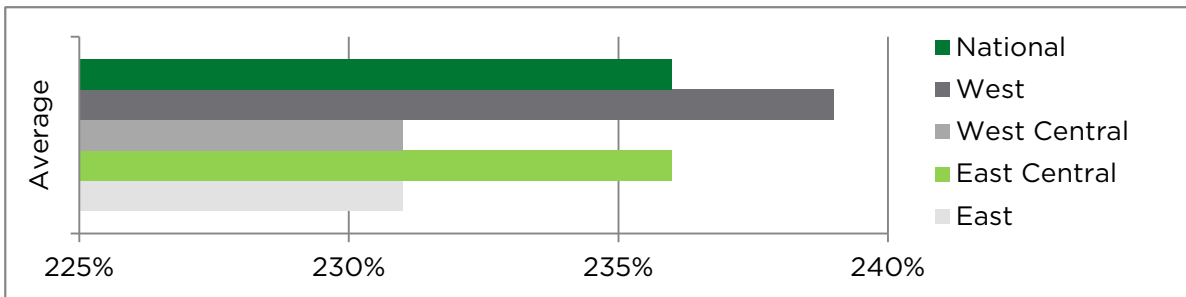
BY AVERAGE PATIENT AGE

	\$20-75	\$76-100	\$101-125	\$126-150	\$151-175	\$176-550	Average
National	13%	13%	28%	29%	11%	6%	\$123.12
21-35	20%	30%	10%	30%	0%	10%	\$106.90
36-50	9%	13%	28%	31%	12%	7%	\$126.87
Over 50	13%	10%	31%	26%	15%	5%	\$125.10



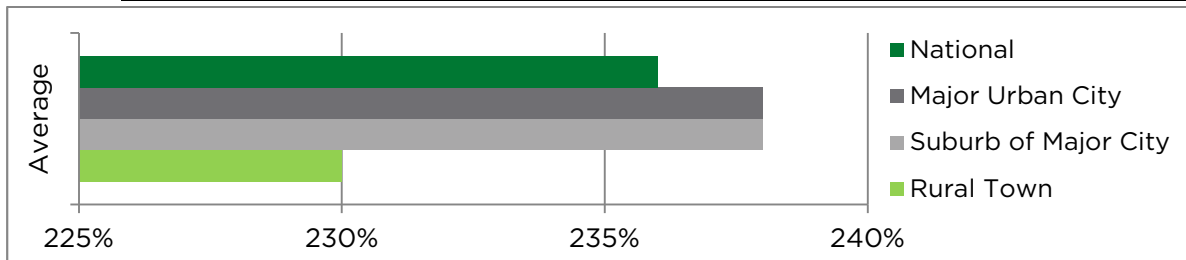
How much do you mark up digital progressive lenses from wholesale?

	130-150%	151-200%	201-250%	251-300%	301-350%	351-400%	Average
National	11%	32%	27%	26%	2%	2%	236%
West	11%	32%	19%	36%	1%	1%	239%
West Central	4%	21%	15%	12%	0%	1%	231%
East Central	8%	21%	18%	15%	2%	2%	236%
East	17%	24%	35%	20%	2%	2%	231%



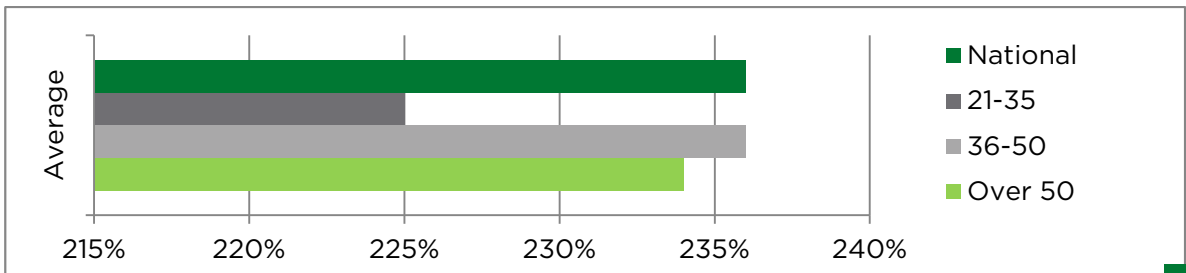
BY CITY SIZE

	130-150%	151-200%	201-250%	251-300%	301-350%	351-400%	Average
National	11%	32%	27%	26%	2%	2%	236%
Major Urban City	11%	36%	19%	24%	4%	6%	238%
Suburb of Major City	14%	25%	28.5%	29.5%	2%	1%	238%
Rural Town	9%	38%	28%	24%	0%	1%	230%



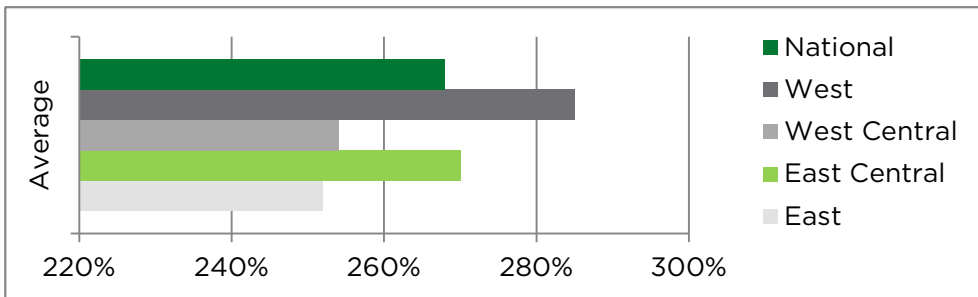
BY AVERAGE PATIENT AGE

	130-150%	151-200%	201-250%	251-300%	301-350%	351-400%	Average
National	11%	32%	27%	26%	2%	2%	236%
21-35	12.5%	37.5%	37.5%	12.5%	0%	0%	225%
36-50	9%	35%	23%	30%	2%	1%	236%
Over 50	16%	27%	31%	21%	1%	4%	234%



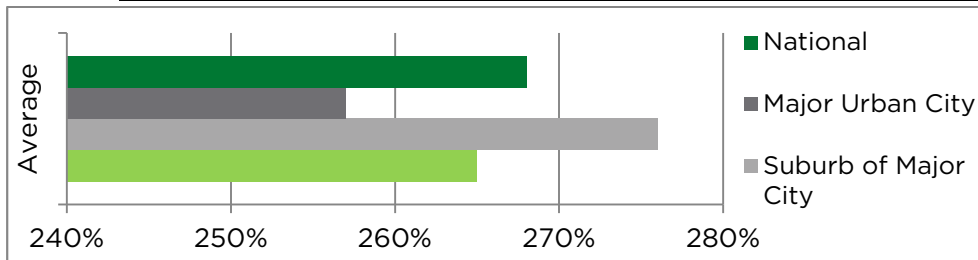
How much do you mark up single vision lenses from wholesale?

	130-150%	151-200%	201-250%	251-300%	301-350%	351-400%	401-1000%	Average
National	7%	29%	22%	27%	3%	7%	5%	268%
West	4%	31%	18%	30%	1%	11%	5%	285%
West Central	7%	34%	22%	24%	2%	7%	4%	254%
East Central	7.5%	27%	19%	27%	6%	9%	4.5%	270%
East	15%	24%	26%	28%	2%	0%	5%	252%



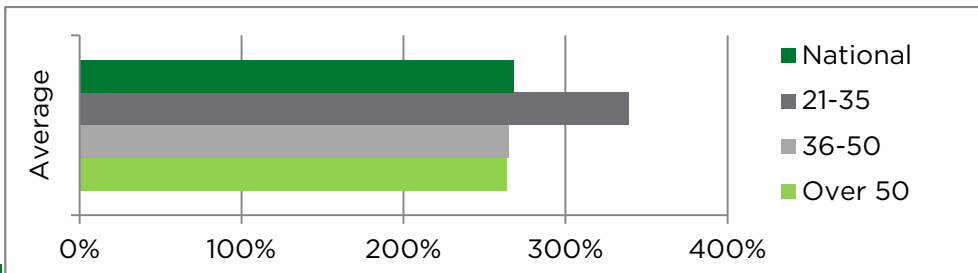
BY CITY SIZE

	130-150%	151-200%	201-250%	251-300%	301-350%	351-400%	401-1000%	Average
National	7%	29%	22%	27%	3%	7%	5%	268%
Major Urban City	4%	36%	22%	19%	6%	9%	4%	257%
Suburb of Major City	11%	22.5%	18%	33.5%	1%	9%	5%	276%
Rural Town	7%	33%	23%	26%	3%	3%	5%	265%



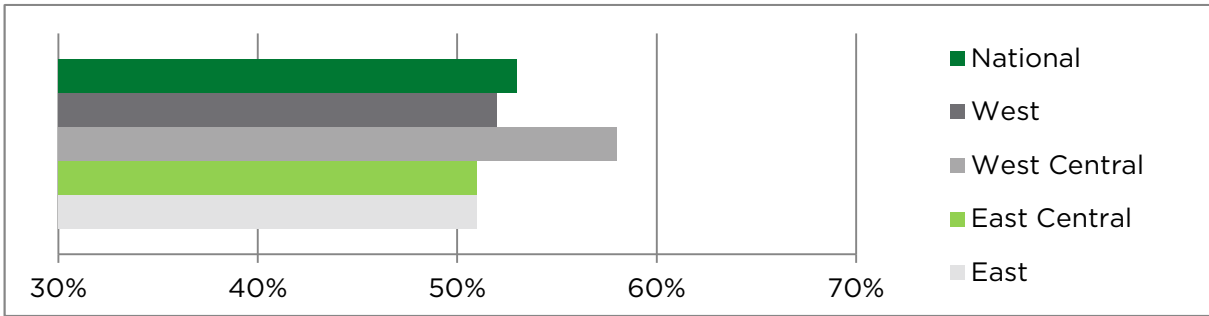
BY AVERAGE PATIENT AGE

	130-150%	151-200%	201-250%	251-300%	301-350%	351-400%	401-1000%	Average
National	7%	29%	22%	27%	3%	7%	5%	268%
21-35	11%	22%	0%	45%	0%	11%	11%	339%
36-50	6%	31%	19%	31%	3%	6%	4%	265%
Over 50	10%	28%	26%	21%	3%	8%	4%	264%



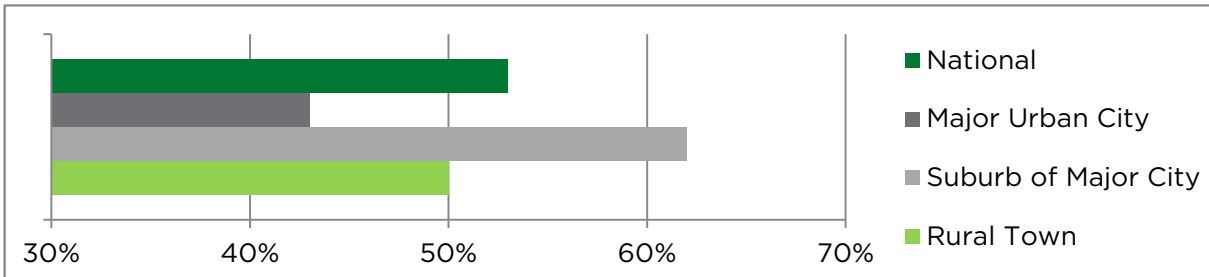
Do you package your offerings together for more competitive pricing?

	Yes	No
National	53%	47%
West	52%	48%
West Central	58%	42%
East Central	51%	49%
East	51%	49%



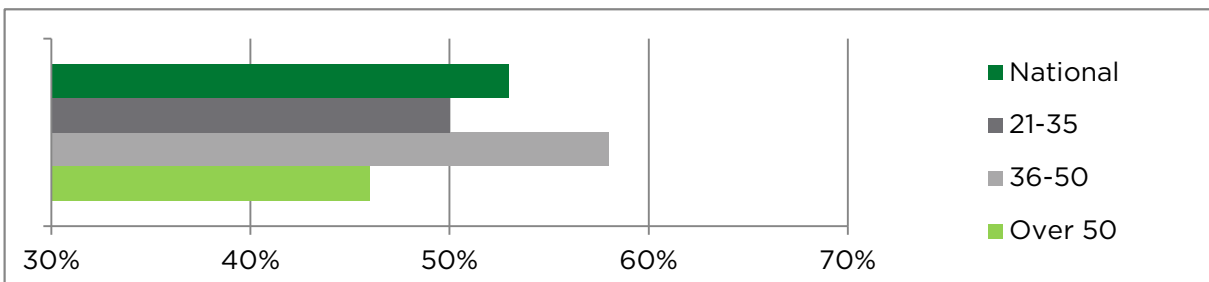
BY CITY SIZE

	Yes	No
National	53%	47%
Major Urban City	43%	57%
Suburb of Major City	62%	38%
Rural Town	50%	50%



BY AVERAGE PATIENT AGE

	Yes	No
National	53%	47%
21-35	50%	50%
36-50	58%	42%
Over 50	46%	54%





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