VersantHealth®

The Growing Value of Vision Care

Examining post-pandemic views on the value of vision health in holistic care, plus the role of managed care and insurers in equitable eye care access

Versant Health's Third Annual Vision Wellness Study
Executive Summary
May 2022

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Introduction: Where does vision care fit into holistic health in a post-pandemic world?

As Americans emerge from the COVID-19 pandemic and look to reset their lifestyles, of which many activities may have been put on hold, the value and interest they place on vision care is rebounding to pre-pandemic levels.

Survey respondents in Versant Health's third annual Vision Wellness Study more often cite eye doctor's abilities to identify diseases as high value services that would make them visit an eye doctor more often, especially if their insurance benefits allow for virtual communication, online shopping, and telemedicine options.

In fact, more survey respondents who don't already have vision insurance say that being able to leverage insurance benefits to purchase eye wear online, communicate remotely with doctors, and have access to virtual/ telemedicine visits would make them more likely to purchase vision insurance (50%, 31%, and 31%, respectively, up from 41%, 23%, and 21% of respondents who said the same the year prior).

The third annual Vision Wellness Study examines Americans' perceptions of eye care, from the value they place on eye care services—both virtual and in-person—to the ways they are seeking guidance in access to vision care from health plans and their managed vision care partners.

The study found that different generations have varying needs and experiences of vision care, from parents of children under 18, to seniors over the age of 65, but convenience is critical across nearly all ages. In addition to high interest in virtual vision care options, respondents are reporting fewer experiences with the most common barriers to accessing eye care—costs and insurance coverage. Still, socioeconomic status remains the largest hurdle to care access, with lower income households more often reporting cost and insurance barriers. To add, some respondents report confusion about how their holistic health plans and vision coverage work together to provide access to care. All these findings combine to point a future of holistic health in which health plans and managed vision care organizations can partner to engage members around modern solutions—and improve access and outcomes for all.

Read on to explore the study findings.

The rising value of vision care

This year, more respondents report vision care services as high value and impactful in making them see an eye doctor more often than they already do, signifying the re-emerging importance of critical eye care in a society that has closely examined its health over the past two years.

Interest in virtual care options—remote communication, telemedicine visits, online eye wear shopping—rose during the height of the pandemic and continue to lead the way in services that motivate Americans to see their eye doctors, indicating that these options are part of the "new normal" of engaging plan members around their vision health. That said, some respondents cite confusion about their insurance coverage, highlighting a chance for education.

While different generations have varying needs, wants, and drivers of eye health, they all have one consideration in common—a desire for vision care convenience that fits their post-pandemic lifestyles.

Evolving perceptions of eye care options and insurance coverage

Three quarters of survey respondents say they have received an eye exam over the past two years, and many respondents say are returning to eye wear stores and eye doctor offices for in person purchases.

All Respondents: Respondents who have received an eye exam over the past two years		
2022	**2021**	**2020**
71%	81%	77%

All respondents (prescription lenses, frames, blue light glasses, etc.): Respondents' eye wear purchasing trends		
	2022	**2021**
Have purchased eye wear in-person at a store or doctor's office	41%	29%
Have not needed to purchase eye wear	23%	31%
Have needed new eye wear, but have delayed for financial reasons	15%	15%
Have needed new eye wear, but have delayed because of not wanting to purchase in person	15%	29%
Have purchased eye wear from an online retailer, such as Warby Parker	10%	11%

> Nearly 50% of people who have purchased eye wear over the past year say that they selected their eye wear provider because their retailer accepts their insurance, pointing to the role that health plans play in accessing care services.

Year-over-year, more survey respondents cite services offered by eye doctors as high value and impactful in making them see eye doctors more often—especially if they can access care by technology-enabled means.

Respondents who have received an eye exam over the past two years: Services offered by eye doctors deemed high value

	2022	2021
The ability to identify eye diseases, or other serious eye problems, even though your vision seems fine	70%	65%
The ability to identify other serious health problems you might have, such as diabetes, early-stage hypertension, etc.	61%	59%
Being able to get covered routine eye exams more frequently	54%	54%
Getting advice on using nutrition for better eye health	47%	44%
Getting healthy eye care tips for the elderly/aging parents	47%	44%
Getting healthy eye care tips for children	43%	38%

Respondents who have received an eye exam over the past two years: Technology-enabled services that have a high impact on the likelihood to see an eye doctor more often

	2022	2021
Being able to COMMUNICATE virtually/remotely with your eye doctor for information/advice and appointment scheduling (video, email, texting,)	39%	31%
Can get information about new eye care technologies	39%	32%
Being able to buy eye wear online	34%	27%
Having technology/tools to ACCESS VISION CARE SERVICES through virtual visits/telemedicine (Zoom calls, Microsoft Teams, etc.)	33%	31%

> Two thirds (65%) of respondents say having access to virtual visits/telemedicine would make them more likely to make an eye doctor appointment. More than one third (37%) say telemedicine is a very important healthcare topic.

Of all respondents, those who do not currently have vision insurance: Technology-enabled services that have a high impact on the likelihood of purchasing vision insurance

	2022	2021
Being able to use insurance to purchase eye wear online	50%	41%
Being able to communicate virtually/remotely with your eye doctor for information/advice and appointment scheduling (video, email, texting)	31%	23%
Having technology/tools to ACCESS VISION CARE SERVICES through virtual visits/ telemedicine (Zoom calls, Microsoft Teams, etc.) covered by insurance	31%	21%

Generational differences in eye health experiences and whole health outcomes

People with children in their household and working adults both prioritize convenience and cost, when it comes to accessing eye care; while seniors prioritize frequency of eye exams, as vision issues are more likely to impact lifestyle with age. Among all generations, the connection between eye care and holistic health is of clear interest.

Parents | Affordability & Access

- 42% of people with children in the household say that a very important healthcare topic is access to telemedicine, as opposed to 31% of people without children in the household
  - 48% of people with children in the household said that a very important healthcare topic is how to establish a savings fund for emergency medical care, as opposed to only 28% of people without children in the household

Working Age Adults | Convenience

- 33% of respondents under the age of 40 cite their work schedule as a reason for not visiting the eye doctor as often as they'd like
- 18% of respondents under 40 say they selected their specific eye wear provider because they could order online, compared to 7% of respondents ages 40-59 and 10% of respondents ages 60+ who say the same

Seniors | Care Frequency

- 84% of respondents ages 60+ say they have received an eye exam in the past two years, compared to 60% of respondents ages 40-59 and 72% of respondents under 40 years old who say the same
- 67% of respondents ages 60+ say that being able to get covered routine eye exams more frequently is of high value, compared to 54% of respondents ages 40-59 and 48% of respondents under the age of 40 who say the same

Barriers to eye care access—and what they signal

Overall, fewer respondents report experiencing cost and insurance barriers to accessing vision care—good news after more than two years of living through a pandemic that has exacerbated economic and health disparities.

That said, the impact of socioeconomic status on vision care access and health outcomes is irrefutable, with money and lack of insurance more often presenting as hurdles for lower income households. As a result, those households take interest in cost containment measures they can take at home and care that is affordable to access.

Respondents want to see connections between their holistic health plans and vision coverage, which rings particularly true for those with Medicaid plans, as those members are more likely to be concerned with the ease of integration of their whole-body and vision care benefits.

Health plans and innovative managed care organizations play an important role in both connecting the dots for members and closing the gaps in their care access.

The social determinants of eye health (SDoH), quantified

While health plans are seeing overall improvements in care barriers, lower income households—i.e., those earning less than $35K annually—more often report money and insurance coverage as their top barriers to accessing eye care, compared to households with higher incomes.

One quarter (23%) of respondents who have received an eye exam in the past two years say cost/affordability is the reason their household doesn't see an eye doctor as often as they'd like, down from 33% in 2021 and 40% in 2020 who said the same. Additionally, 16% say vision insurance is the reason, down from 20% in 2021 and 28% in 2020.

All respondents: Socioeconomic comparisons in access to vision care and insurance

	Less than $35K annually	$35K-75K annually	More than $75K annually
Have NOT received an eye exam in the past two years	19%	9%	6%
Have needed new eye wear, but have delayed for financial reasons	24%	17%	9%
Do NOT have vision insurance that covers their eyecare costs	28%	15%	9%
Cost/affordability is the reason they do not see an eye doctor as often as they'd like	35%	23%	16%
Transportation is the reason they do not see an eye doctor as often as they'd like	22%	7%	12%

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__SDoH__ are critical to vision health and eye disease management; yet, individuals with eye disease tend to report worse healthcare access, social isolation, and food security, finds Investigative Ophthalmology & Visual Science. This points to a correlation between SDoH and access to adequate vision care—which also has implications for overall health, since routine eye exams can identify upward of 30 chronic health conditions.

Health plans and their managed vision care partners have a significant, collaborative role to play in addressing SDoH in meaningful and measurable ways.

“Innovating to Address Social Determinants of Vision Health and Member Wellness” —Versant Health, May 2022

Potentially resulting from their care cost concerns, lower income households show greater interest in measures that will help them keep their families healthy at home to supplement care that is both efficient and affordable.

All respondents: Factors that would make respondents more likely to make an eye doctor appointment

	Less than $35K annually	$35K-75K annually	More than $75K annually
Getting advice on nutrition for better eye health	87%	79%	66%
Having access to technology/tools for virtual visits/ telemedicine (Zoom calls, Microsoft Teams, etc.)	81%	65%	58%
Getting healthy eye care tips for aging/elderly parents	74%	67%	63%
Getting healthy eye care tips for children	69%	60%	52%

Respondents who have received an eye exam over the past two years: Services offered by eye doctors deemed high value

	Less than $35K annually	$35K-75K annually	More than $75K annually
Getting advice on nutrition for better eye health	52%	49%	44%
Getting healthy eye care tips for aging/elderly parents	54%	54%	39%
Getting healthy eye care tips for children	49%	46%	36%

The significant role of health plans and Medicaid

Respondents see the value in insurance coverage and the advice they receive from their insurers and care providers; still, some report confusion regarding the connections between their holistic health plans and vision care benefits.

All respondents: Sources from which respondents are very likely to seek advice about eye health and/or vision care		
	2022	**2021**
Eye care professionals	67%	68%
Healthcare insurance providers/plans	44%	36%
Family and friends	32%	23%
Internet/websites, such as WebMD	31%	26%
Employers	25%	15%
Co-workers	21%	14%

Of those respondents who have received an eye exam in the past two years, nearly half (49%) say better understanding what vision care services are included in their health insurance plan has a high impact on them seeing an eye doctor more often.

All respondents: Services offered by insurance deemed highly valuable	
Having affordable insurance benefits that cover medical care AND vision care	68%
Having in-network doctors (covered by insurance) located near you	65%
Having access to insurance benefits that cover medical care AND vision care	63%
Working with a health insurer that makes sure all your doctors/care providers coordinate test results, diagnoses, treatments, etc.	56%
Being able to access health advice through a health insurer outside of regular business hours	46%

87% of all respondents say having vision care visits covered by health insurance would make them more likely to make an eye doctor appointment.

For Americans with Medicaid insurance coverage, a combination of cost and convenience is the driving factor for accessing care through their health plans—even more so than the general population.

20% of respondents with Medicaid coverage say they have needed new eye wear but delayed for financial reasons, higher than the 15% of general population respondents who say the same.

Respondents who have received an eye exam over the past two years: Services that have a high impact on the likelihood to see an eye doctor more often

	Medicaid	Overall
Getting information on how to save money on healthcare through eye exams	54%	46%
Being able to communicate virtually/remotely with your eye doctor for information/advice and appointment scheduling (video, email, texting)	50%	39%
Having technology/tools to ACCESS VISION CARE SERVICES through virtual visits/telemedicine (Zoom calls, Microsoft Teams, etc.)	49%	33%
Being able to buy eye wear online	41%	34%

47% of respondents with Medicaid coverage say telemedicine is a very important healthcare topic, compared to 37% of respondents in the general population.

Of all respondents, those who do not currently have vision insurance: Services that have a high impact on the likelihood of purchasing vision care insurance

	Medicaid	Overall
Having eye exams covered	85%	71%
Having glasses, frames, and lenses covered	79%	64%
The ability to purchase vision insurance as part of a health plan	74%	54%
The ability to use vision insurance to purchase eye wear online	62%	50%
Having technology/tools to ACCESS VISION CARE SERVICES through virtual visits/telemedicine (Zoom calls, Microsoft Teams, etc.)	47%	31%

Conclusion: Eye health is a critical component of holistic health plans

Now, more than the year prior, Americans are recognizing the value in vision care to their overall health and are seeking cost containment and convenience by way of technology-enabled access to care—and they are looking to their holistic health plans to help them get there.

The good news is that fewer respondents are experiencing cost and insurance barriers to better health outcomes! Still, innovative managed vision care organizations and health plans know that they must continue to transform member engagement programs to make access to care equitable for the most vulnerable of Americans.

The "new normal" for holistic health plans include a combination of both virtual and in-person vision care options that allow members to address their health on their own terms—no matter their demographic or socioeconomic status—and it's here to stay.

Methodology

The Vision Wellness Study by Versant Health conducted online surveys fielded by Market Measurement, a custom market research firm, with 558 consumers over the age of 18 from February 7 to 18, 2022. They were asked their opinions of routine eye care, access to eye exams, preventative health measures, care costs, and other topics related to managed vision care and insurance.

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