

CORONAVIRUS ECP STUDY

Jobson
Information Services **O P T I C A L**

R E S E A R C H

Wave 20

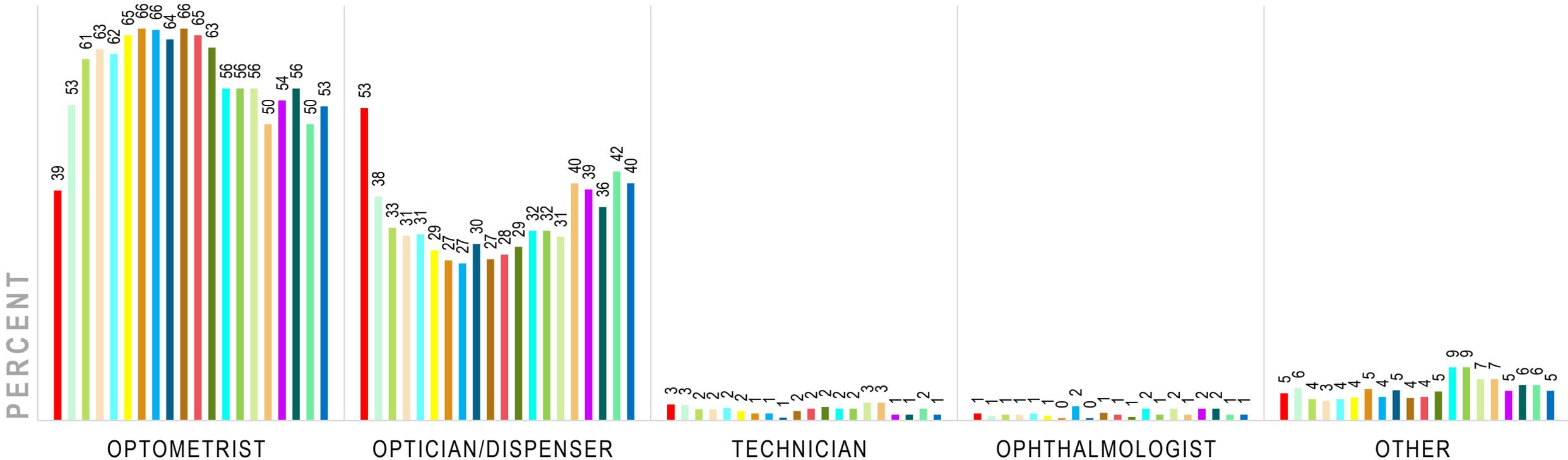
Feb 25-28

RESPONDENTS

- This survey was asked in several waves.
 - Questions varied slightly in each wave.
 - Comparisons are shown wherever possible.
- Wave 1 ran from Mar 13-17, 2020. 583 completes.
 - Wave 2 ran from Mar 18-19, 2020. 1,341 completes.
 - Wave 3 ran from Mar 23-24, 2020. 1,285 completes
 - Wave 4 ran from Mar 28-30, 2020. 1,769 completes.
 - Wave 5 ran from Apr 7-9, 2020. 1,306 completes.
 - Wave 6 ran from Apr 16-19, 2020. 1,110 completes.
 - Wave 7 ran from Apr 24-27, 2020. 922 completes.
 - Wave 8 ran from May 1-4, 2020. 699 completes.
 - Wave 9 ran from May 8-12, 2020. 557 completes.
 - Wave 10 ran from May 22-26, 2020. 758 completes.
 - Wave 11 ran from Jun 5-9, 2020. 635 completes.
 - Wave 12 ran from Jun 19-23, 2020. 813 completes.
 - Wave 13 ran from Jul 10-15, 2020. 497 completes.
 - Wave 14 ran from Aug 21 – 27, 2020. 576 completes.
 - Wave 15 ran from Sep 18-22, 2020. 638 completes.
 - Wave 16 ran from Oct 16-20, 2020. 771 completes.
 - Wave 17 ran from Nov 24-30, 2020. 619 completes.
 - Wave 18 ran from Dec 21-31, 2020. 500 completes.
 - Wave 19 ran from Jan 27-29, 2021. 503 completes.
 - Wave 20 ran from Feb 25-28, 2021. 475 completes.

RESPONDENT DEMOGRAPHICS

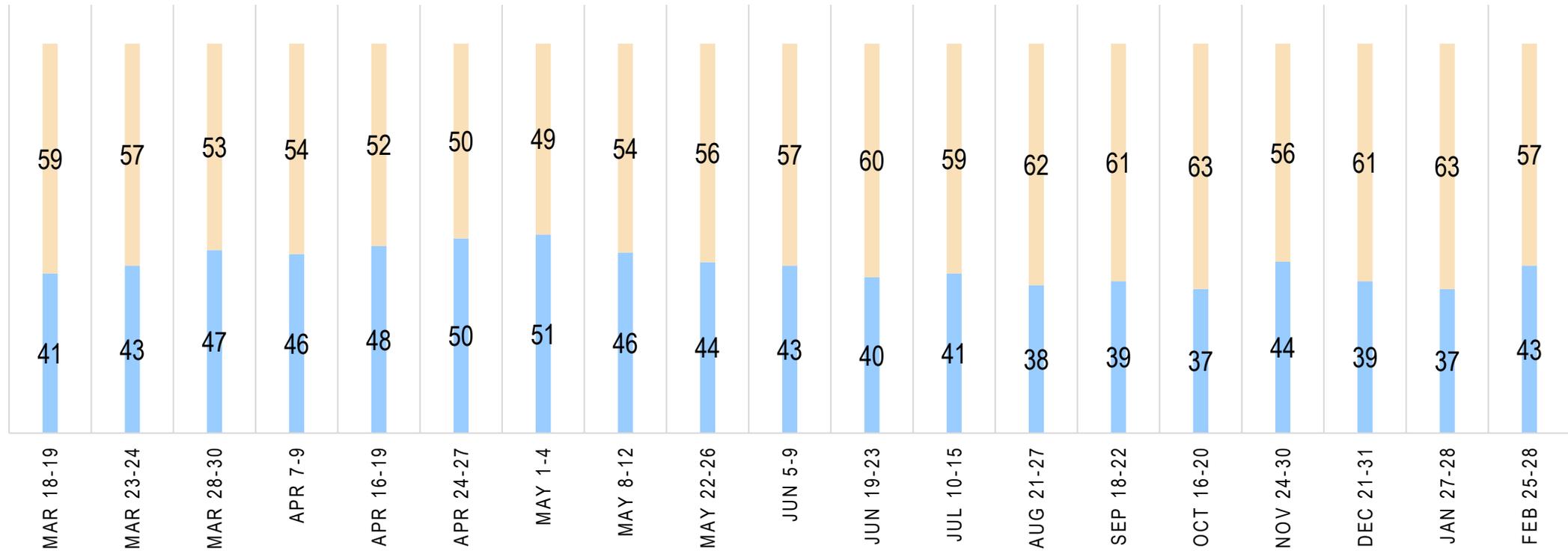
RESPONDENT PROFESSION



GENDER

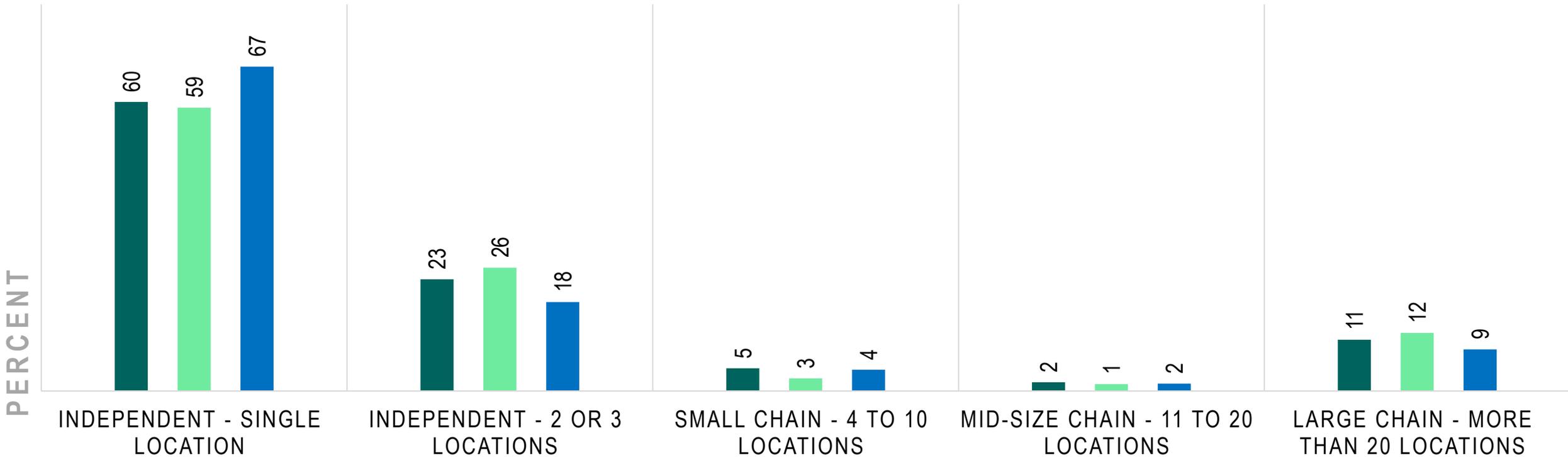
Female

Male



LOCATION TYPE

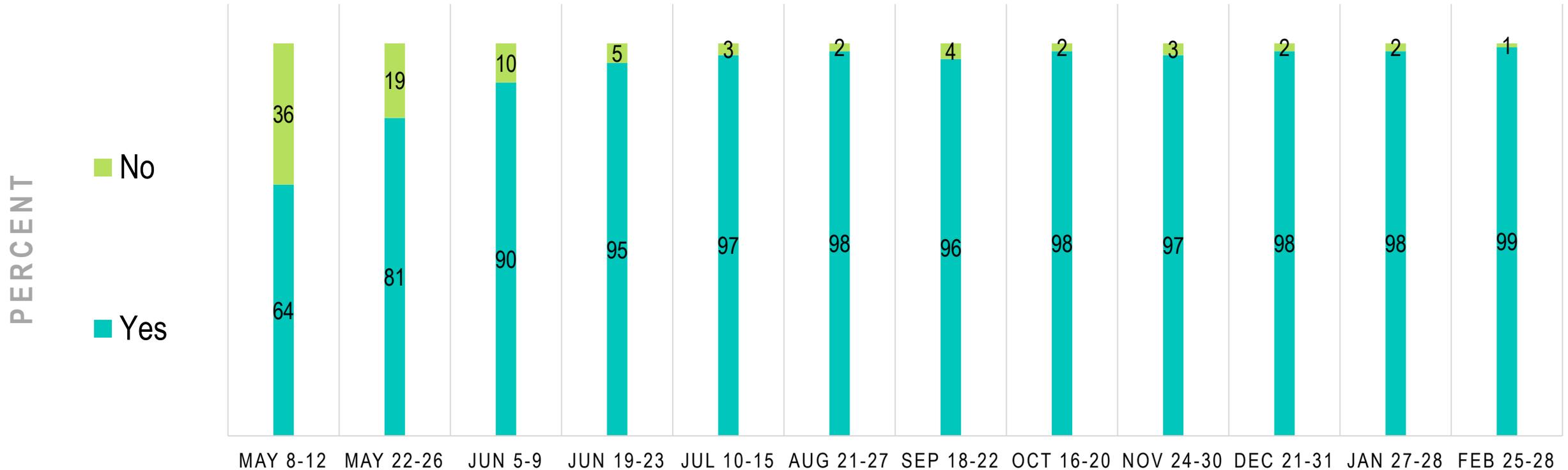
■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



PRACTICE STATUS

LOCATION OPEN?

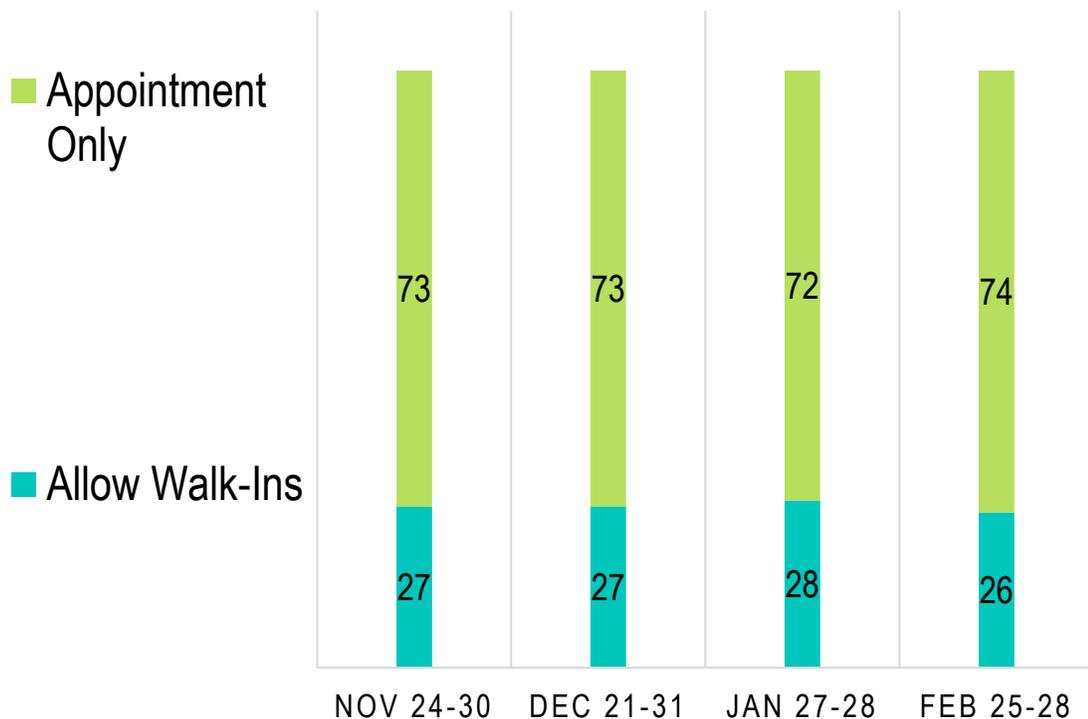
Jobson Research estimates 2%-3% of optical locations will have closed permanently due to the pandemic



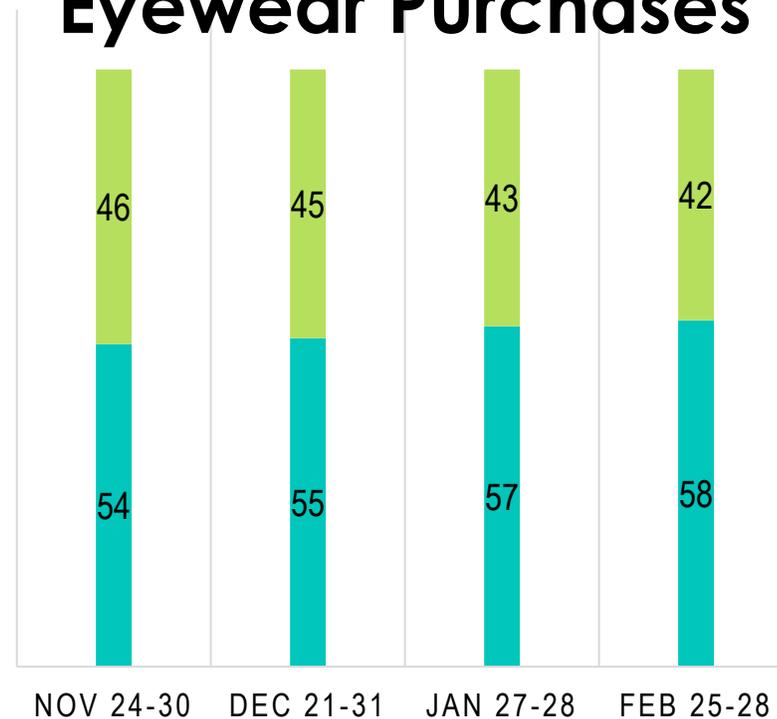
PRACTICES

WALK-INS VS. APPOINTMENTS

For Eye Exams

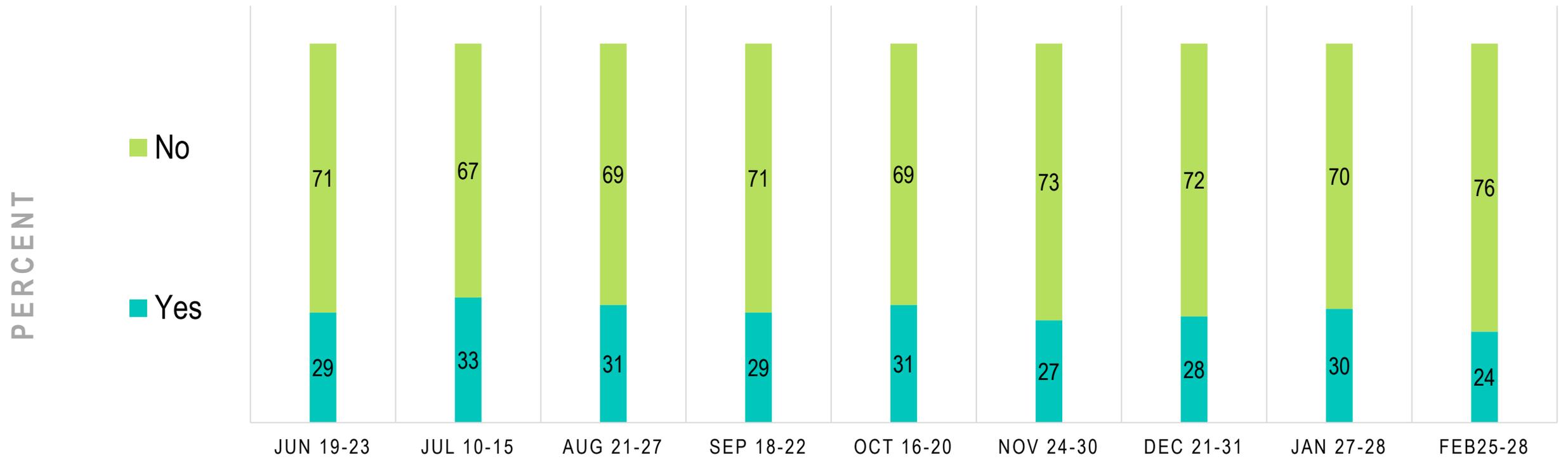


For Dispensing/ Eyewear Purchases



STAFF

HAS ANY STAFF ELECTED NOT TO COME BACK TO WORK DUE TO THE PANDEMIC?

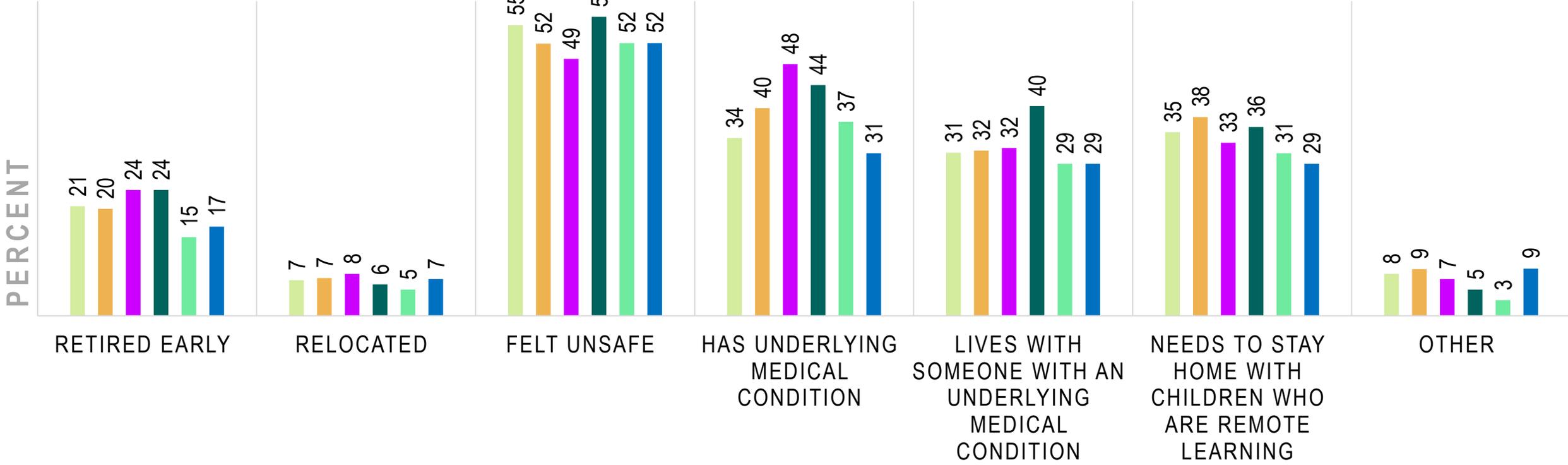


If any staff elected not to come back to work:

REASONS STAFF ELECTED NOT TO COME BACK

Check all that apply.

■ Sep 18-22 ■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

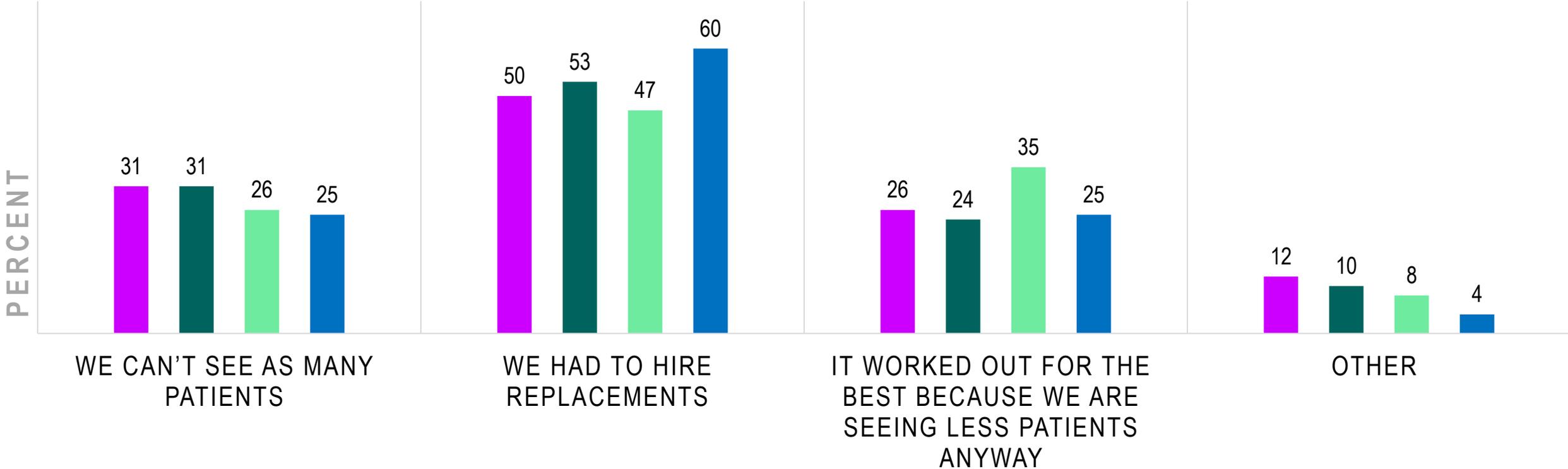


If some staff has not returned to work:

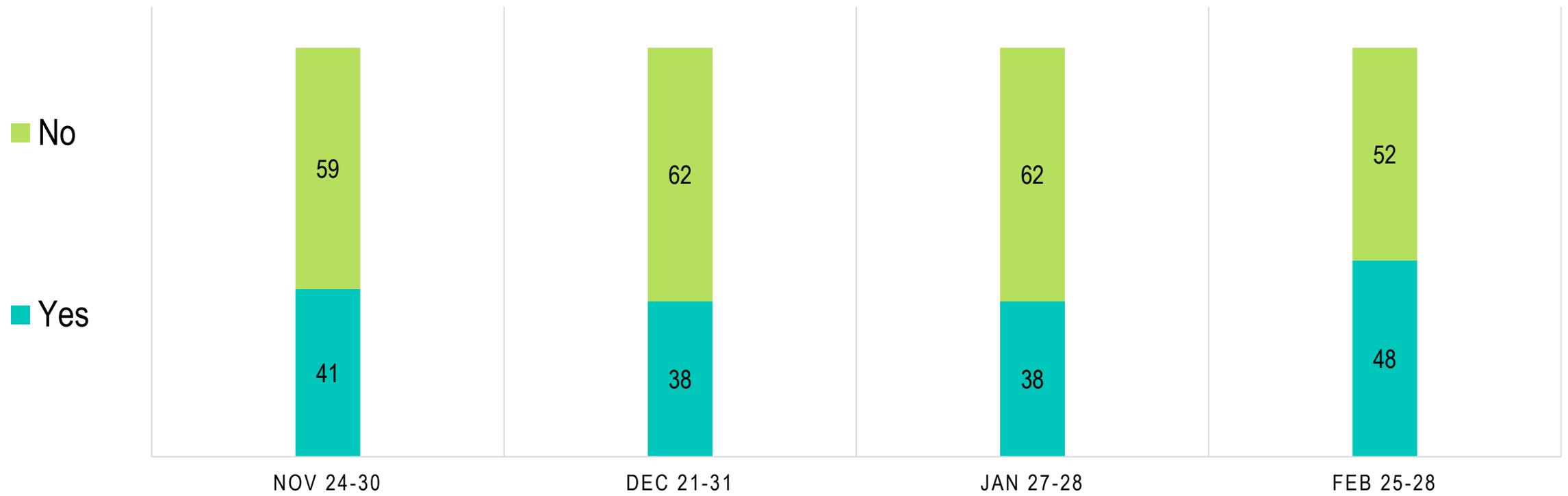
HOW HAS SOME OF YOUR STAFF NOT RETURNING TO WORK AFFECTED YOUR BUSINESS?

Check all that apply.

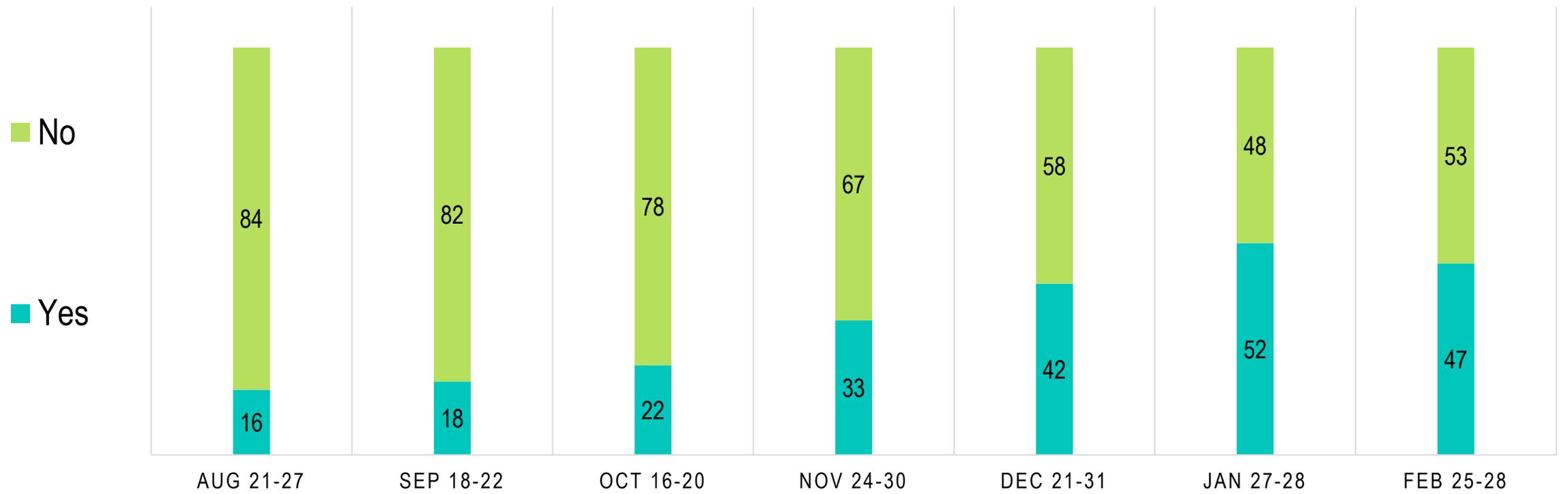
■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



DO ALL STAFF MEMBERS WEAR FACE SHIELDS OR SAFETY GOGGLES?



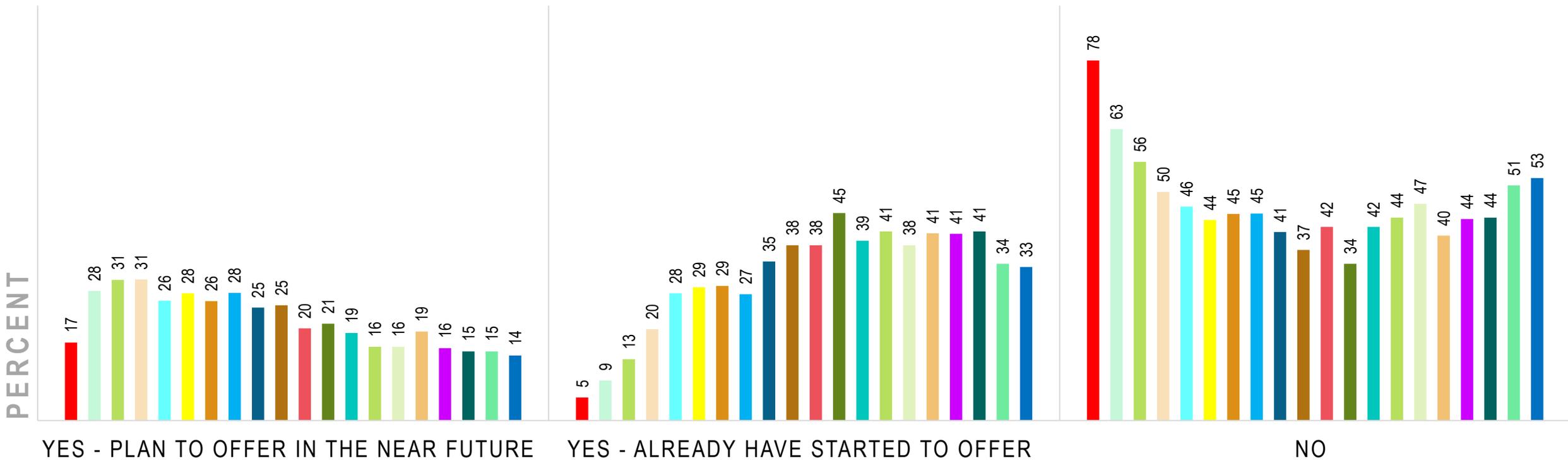
HAS ANYONE WHO WORKS AT YOUR LOCATION GOTTEN COVID-19?



TELEHEALTH

HAS THE CORONAVIRUS INFLUENCED YOUR CONSIDERATION OF OFFERING TELEHEALTH SERVICES/OPTIONS?

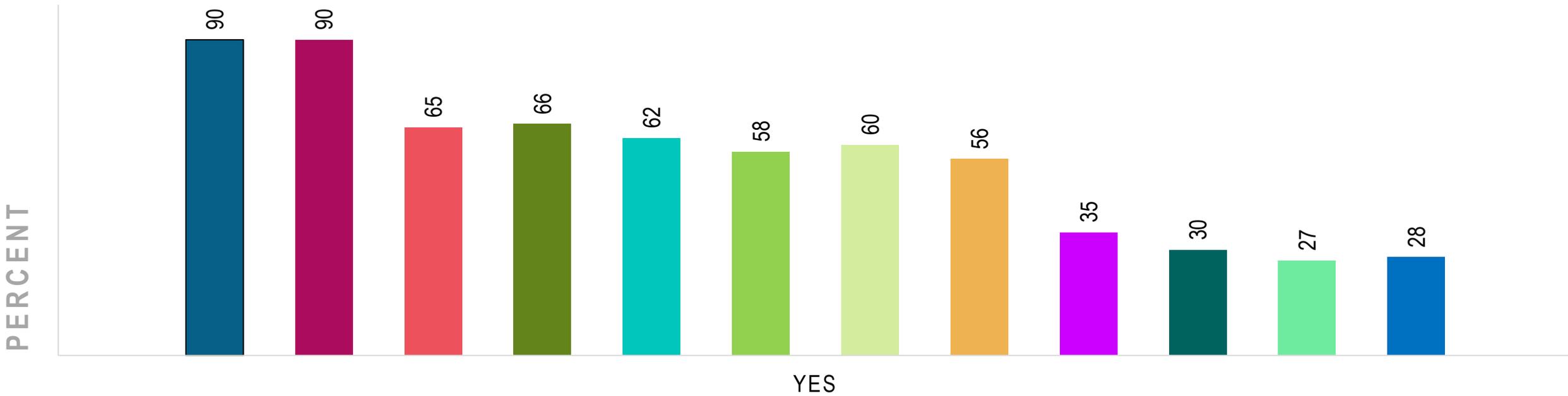
■ Mar13-17 ■ Mar 18-19 ■ Mar 23-24 ■ Mar 28-30 ■ Apr 7-9 ■ Apr 16-19 ■ Apr 24-27 ■ May 1-4 ■ May 8-12 ■ May 22-26
■ Jun 5-9 ■ Jun 19-23 ■ Jul 10-15 ■ Aug 21-27 ■ Sep 18-22 ■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



If currently offering telehealth:

PLANS TO INTEGRATE TELEHEALTH INTO THE PRACTICE ON A REGULAR BASIS

■ May 8-12 ■ May 22-26 ■ Jun 5-9 ■ Jun 19-23 ■ Jul 10-15 ■ Aug 21-27 ■ Sep 18-22 ■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

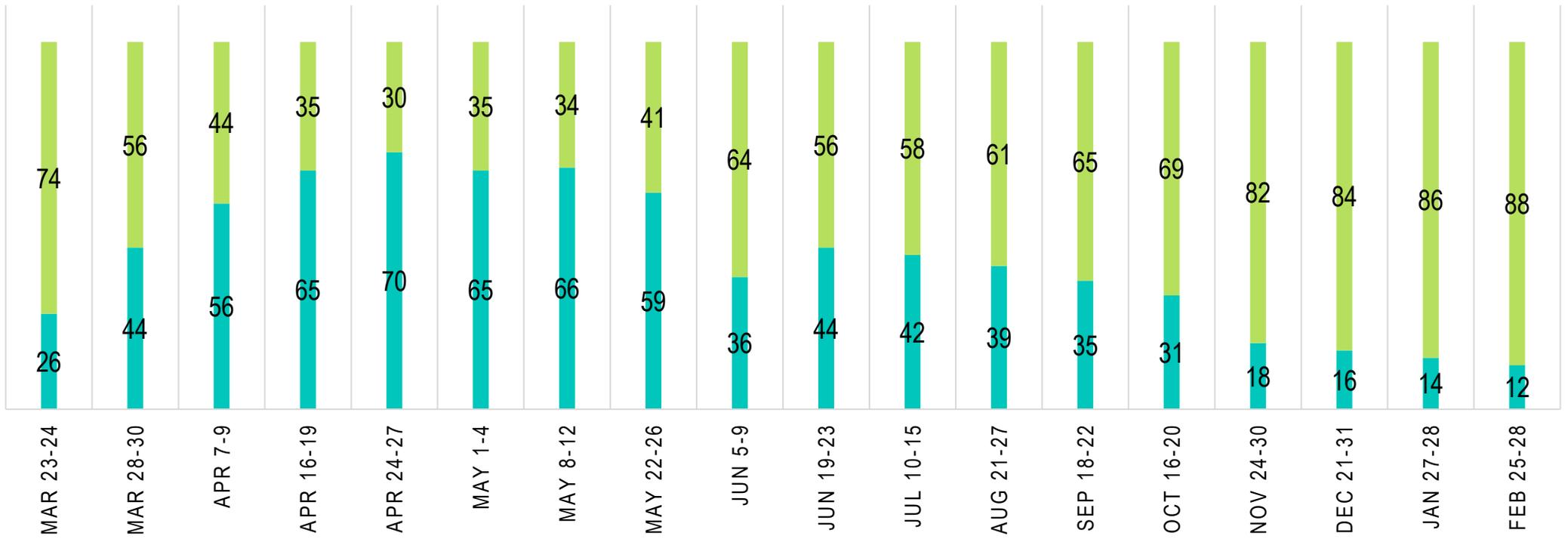


If currently offering telehealth:

HAVE YOU BILLED FOR TELEHEALTH SERVICES IN THE LAST TWO WEEKS?

PERCENT

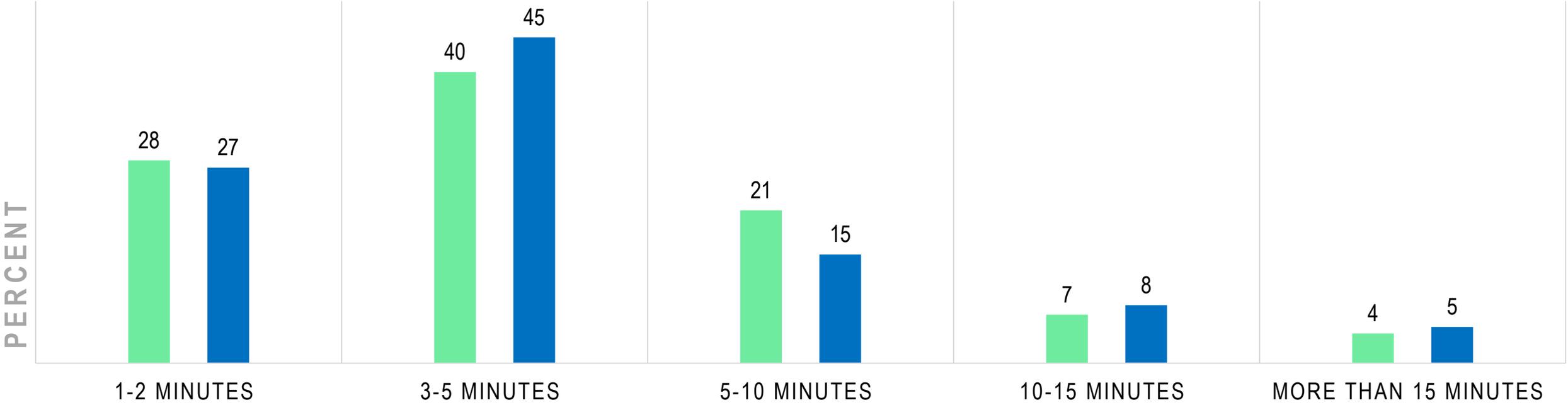
No
Yes



CLEANING & SANITATION

APPROXIMATELY, HOW MUCH ADDITIONAL TIME DO YOU NOW ALLOCATE TO CLEANING THE OFFICE/EXAM ROOMS FOR EACH PATIENT?

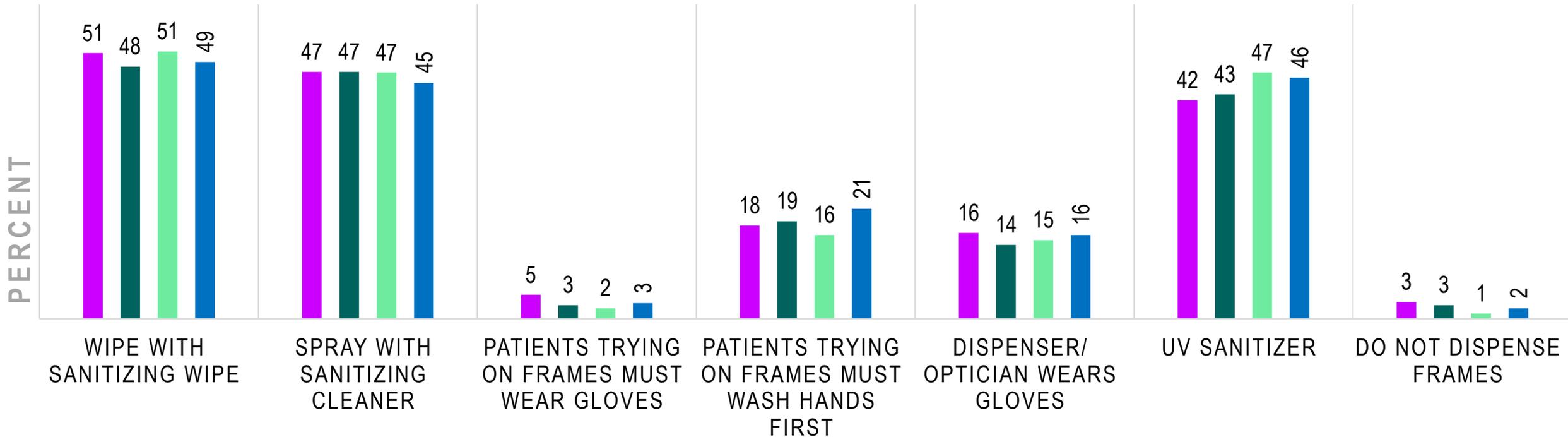
■ Jan 27-28 ■ Feb 25-28



HOW DO YOU CLEAN FRAMES THAT HAVE BEEN TRIED ON?

Check all that apply.

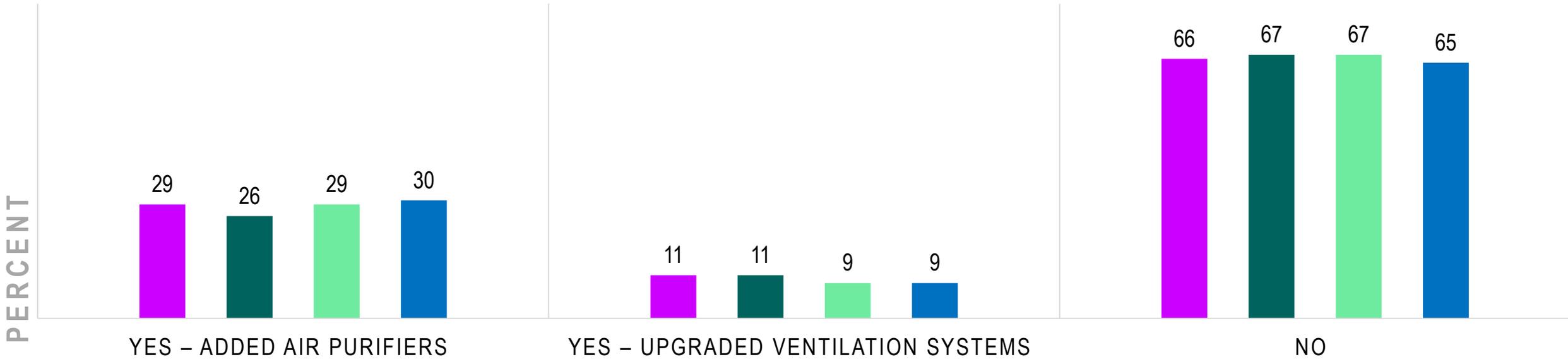
■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



HAS YOUR LOCATION ADDED ANY AIR PURIFIERS OR UPGRADED VENTILATION SYSTEM?

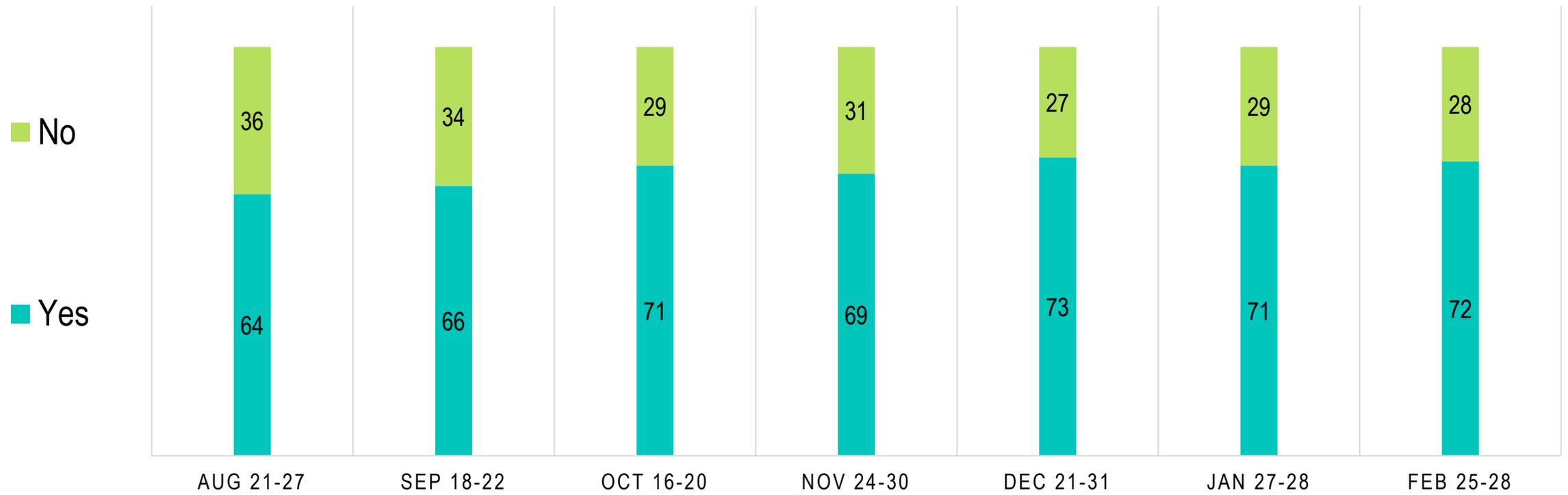
Check all that apply.

■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



PATIENTS

HAVE YOU NOTICED MORE PATIENTS HAVING ISSUES DUE TO INCREASED SCREEN TIME?

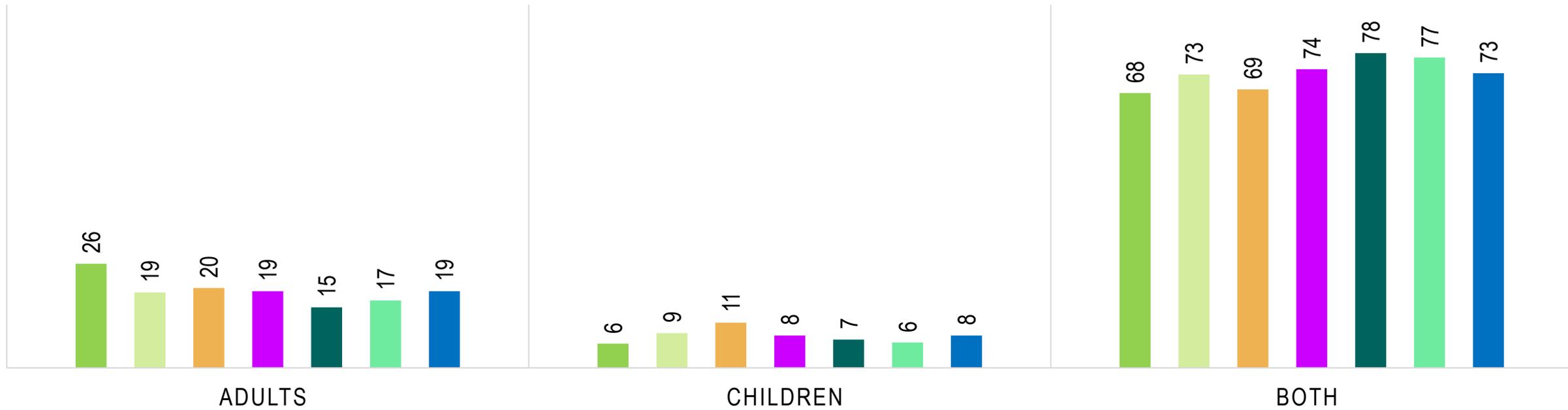


IF NOTICED MORE PATIENTS HAVING ISSUES DUE TO INCREASED SCREEN TIME:

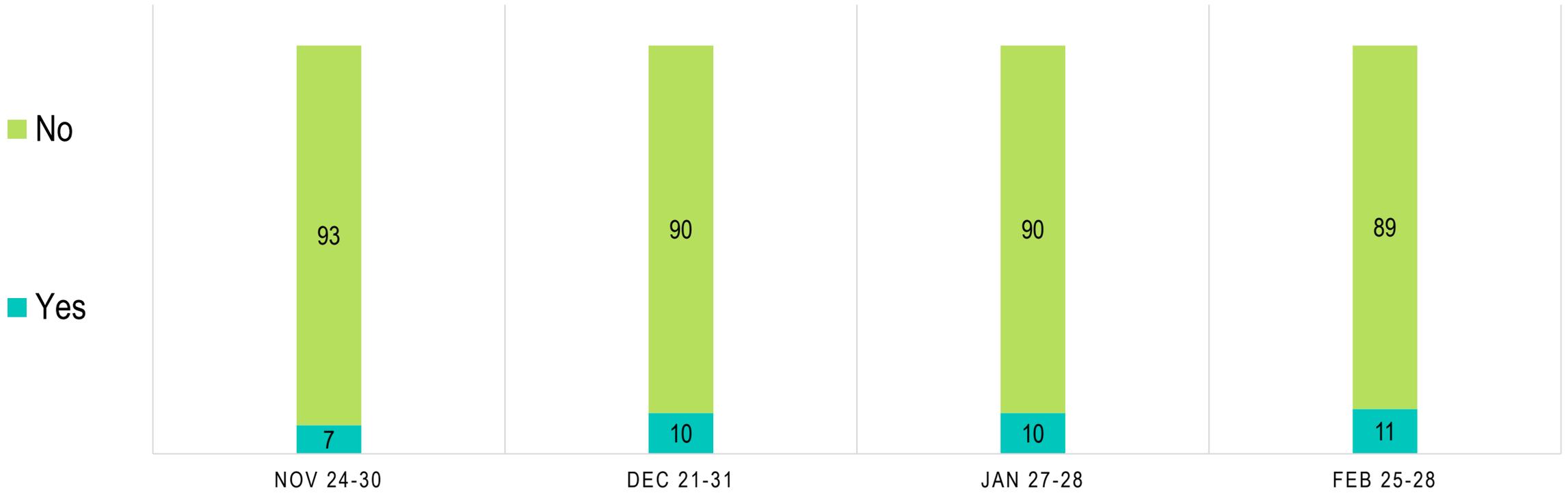
HAVE YOU SEEN THIS MORE WITH ADULTS OR CHILDREN?

■ Aug 21-27 ■ Sep 18-22 ■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

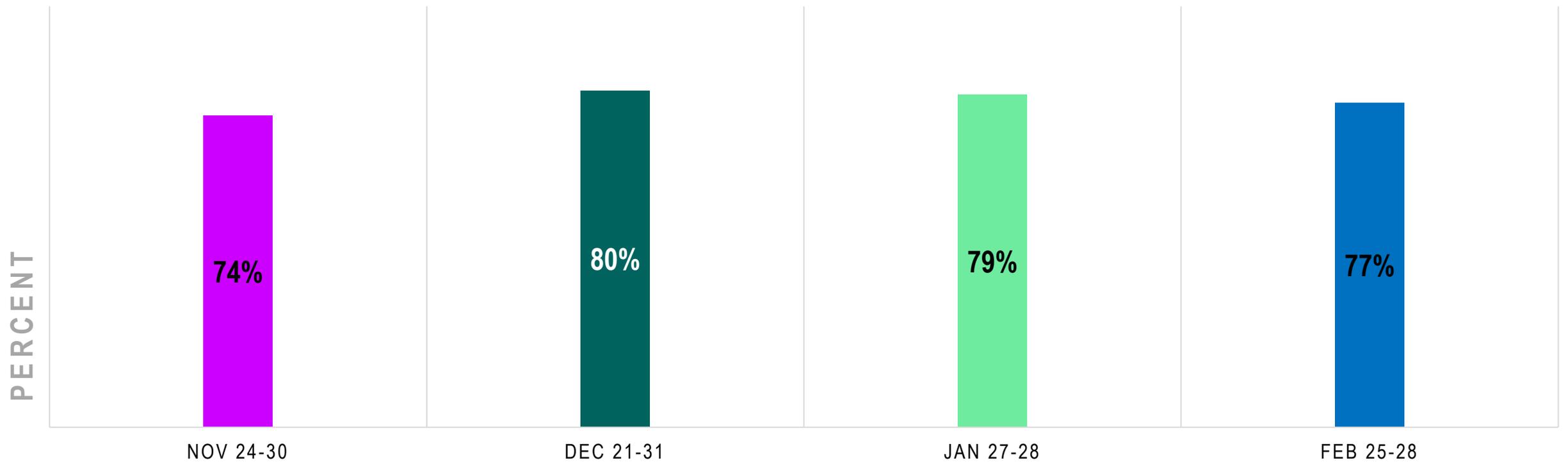
PERCENT



HAVE YOU NOTICED ANY OCULAR CHANGES IN PATIENTS WHO HAD COVID-19?



WHAT PERCENT OF YOUR EYEGLASS-WEARING PATIENTS COMPLAIN ABOUT LENSES FOGGING UP WHEN WEARING A MASK?



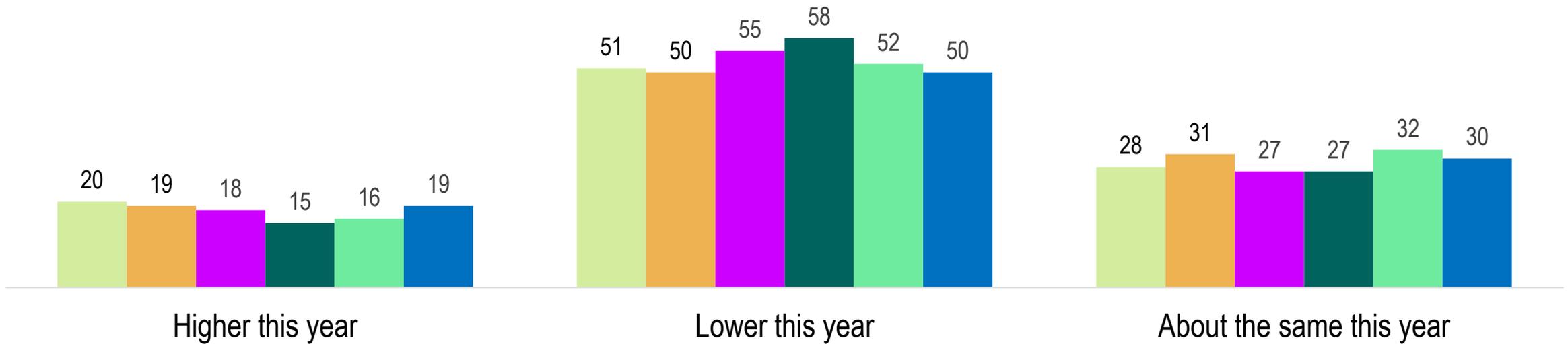
PATIENT VOLUME

PATIENTS PER DAY

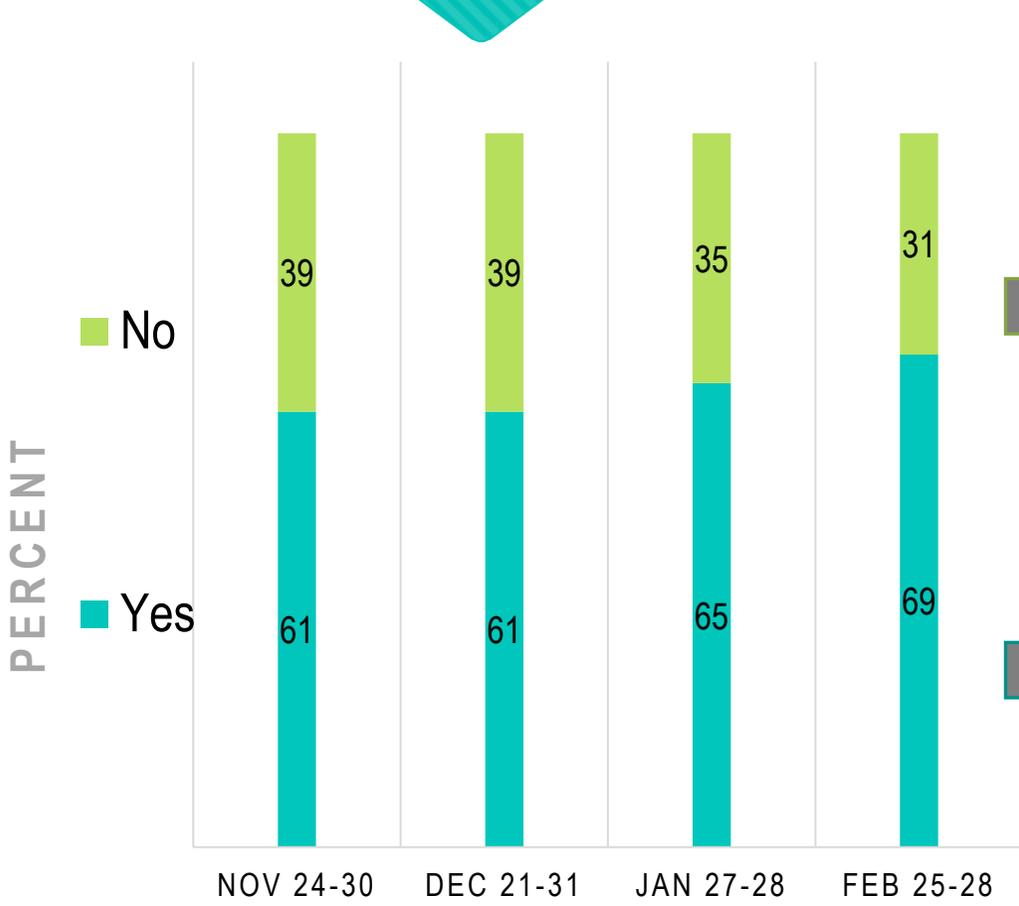
THIS MONTH THIS YEAR VS. PREVIOUS YEAR

■ Sep 18-22 ■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

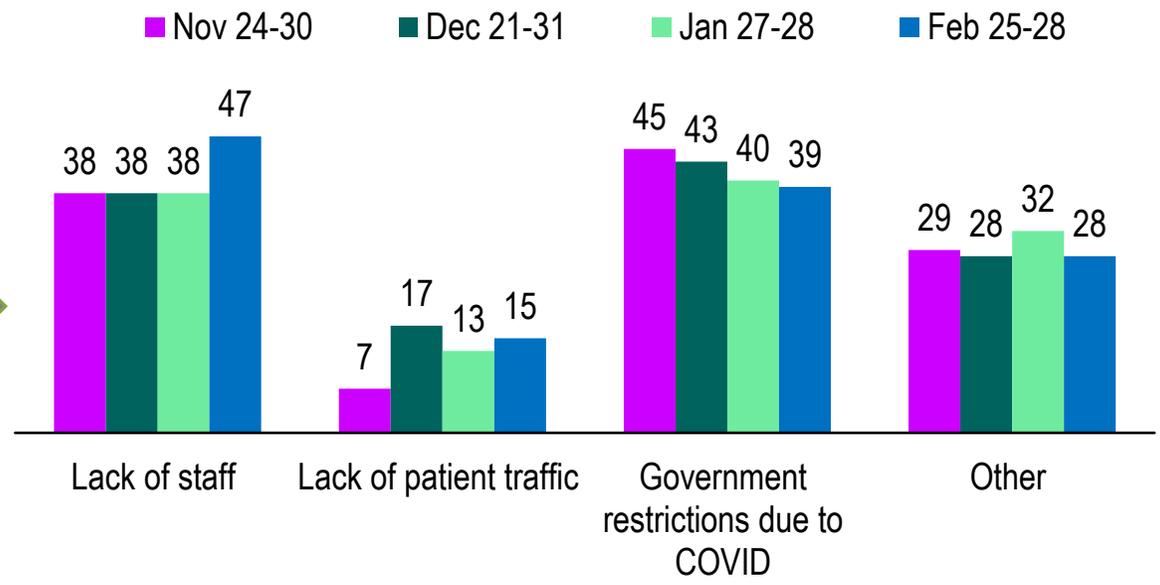
PERCENT



DO YOU BELIEVE YOUR PRACTICE HAS THE CAPACITY TO SERVE MORE PATIENTS THAN YOU ARE CURRENTLY SEEING NOW?



WHY NO?



WHAT % MORE?

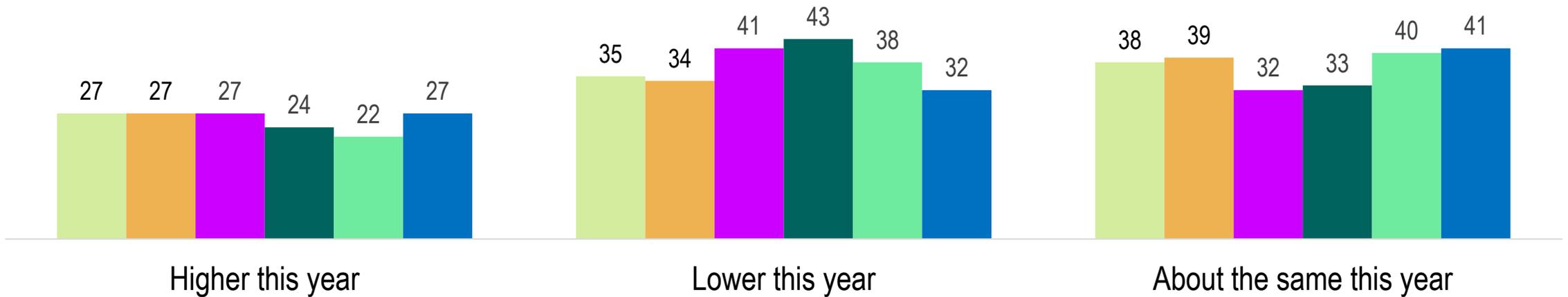
Average: 35% more
Average: 31% more
Average: 32% more
Average: 30% more

PROFITABILITY

THIS MONTH THIS YEAR VS. PREVIOUS YEAR

■ Sep 18-22 ■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

PERCENT

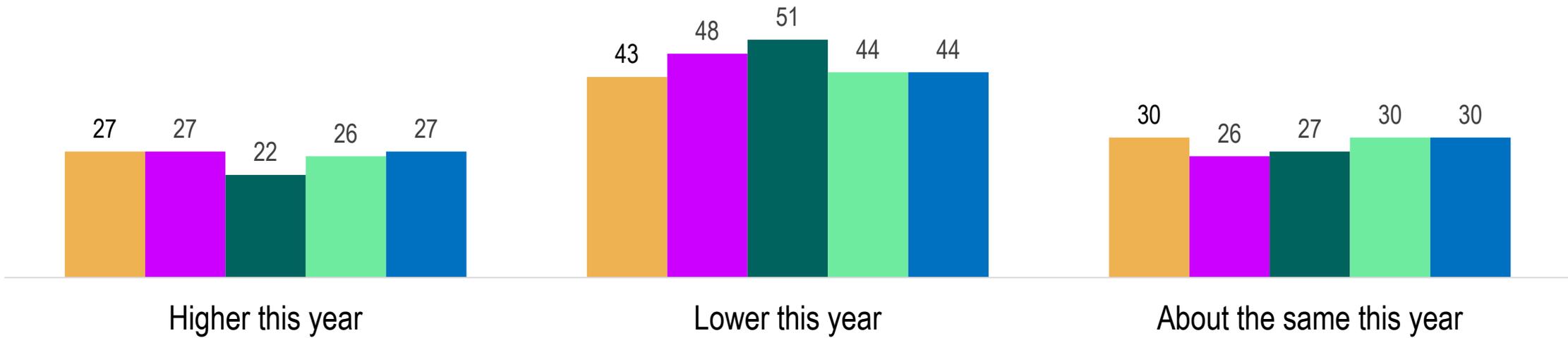


OPTICAL SALES

THIS MONTH THIS YEAR VS. PREVIOUS YEAR

■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

PERCENT



REVENUE

AS A % PER SAME WEEK THIS YEAR VS. PREVIOUS YEAR

Sep 18-22

74%

Oct 16-20

74%

Nov 24-30

72%

Dec 21-31

76%

Jan 27-28

73%

Feb 25-28

74%

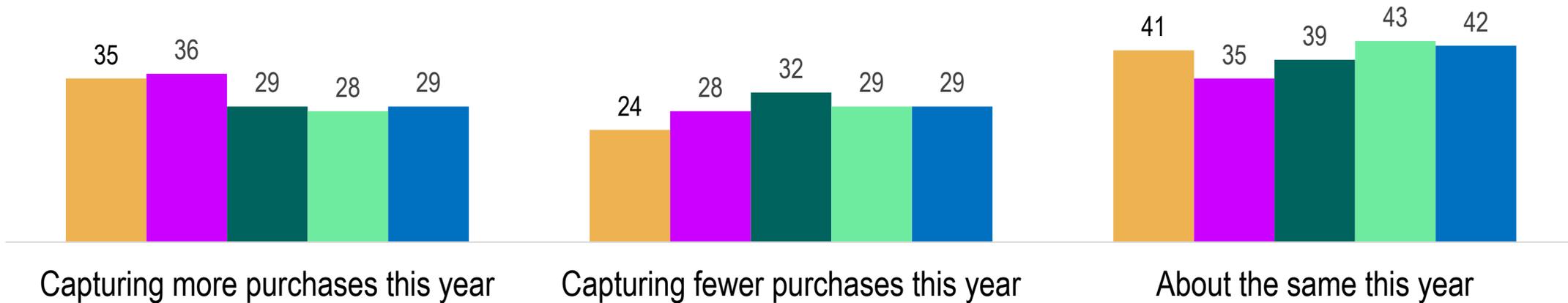
PERCENT

CAPTURE RATE

How do you think your capture rate in the last few months has fared compared to the previous year, meaning the percent of patients who get examined at your location and need eyewear that make their purchase from your location (instead of shopping elsewhere for their eyewear)?

■ Oct 16-20 ■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

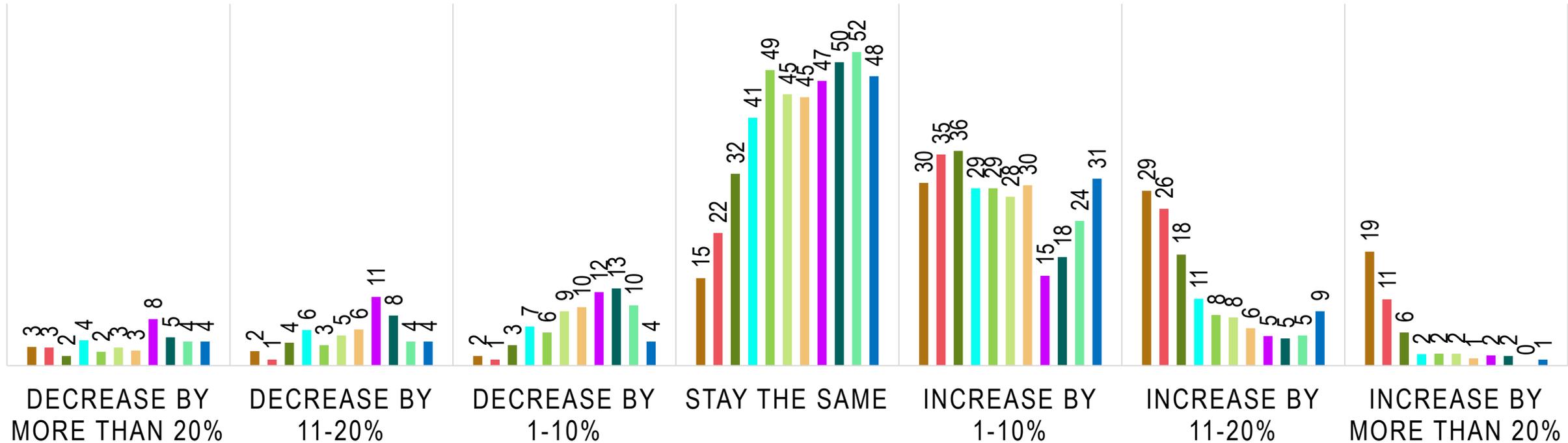
PERCENT



HOW DO YOU THINK THE # OF PATIENTS YOU SEE PER DAY WILL CHANGE OVER THE NEXT 30 DAYS?

■ May 22-26
 ■ Jun 5-9
 ■ Jun 19-23
 ■ Jul 10-15
 ■ Aug 21-27
 ■ Sep 18-22
 ■ Oct 16-20
 ■ Nov 24-30
 ■ Dec 21-31
 ■ Jan 27-28
 ■ Feb 25-28

PERCENT

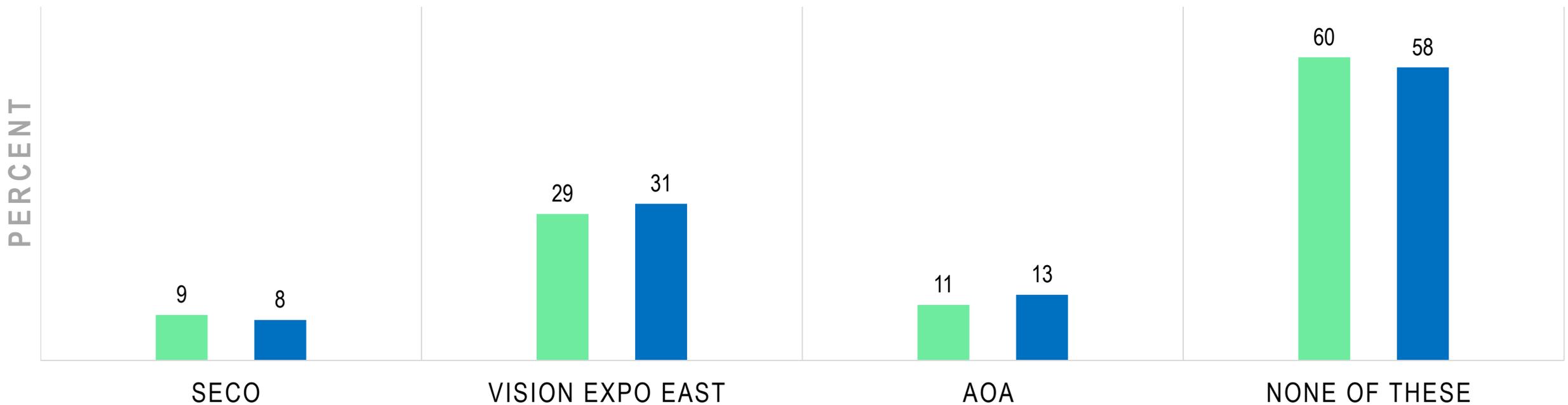


TRADE SHOWS

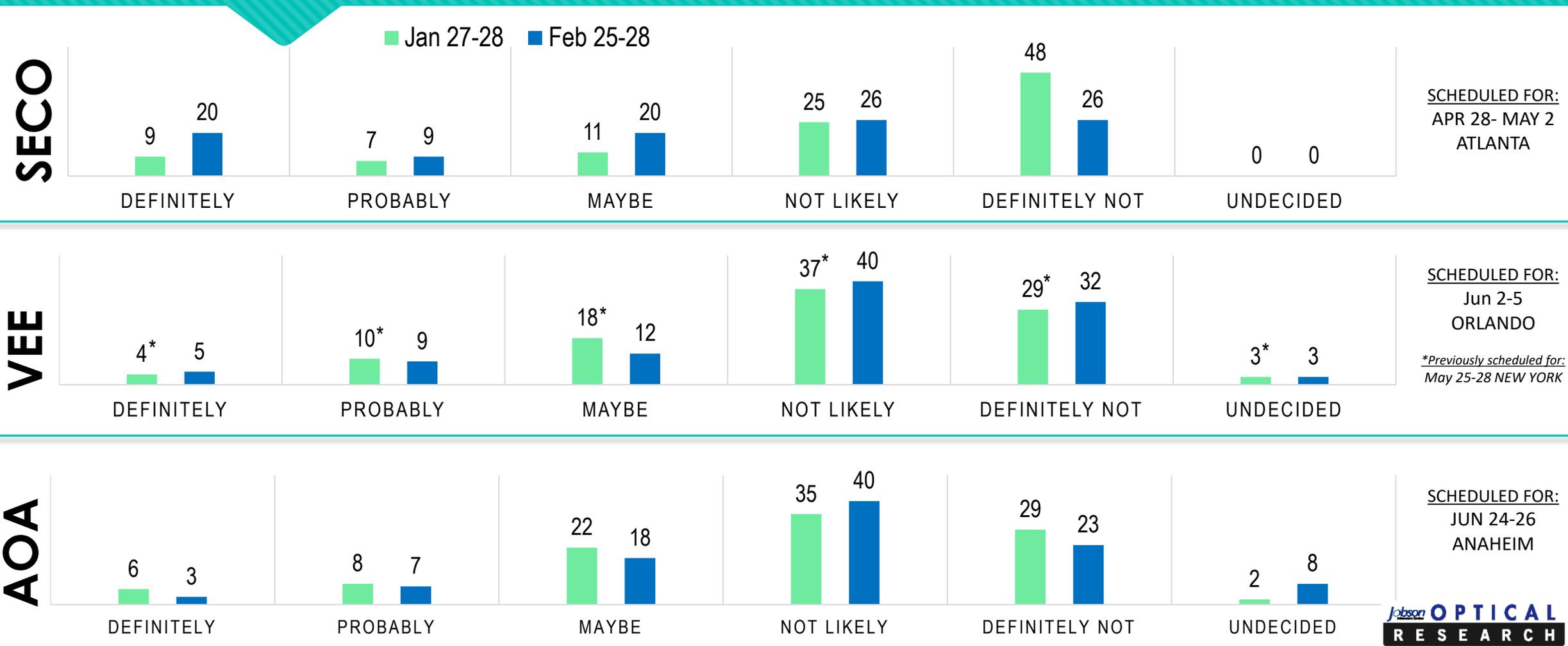
WHICH OF THE FOLLOWING TRADE SHOWS DID YOU TYPICALLY ATTEND PRE-COVID IN THE FIRST HALF OF THE YEAR?

Check all that apply.

■ Jan 27-28 ■ Feb 25-28



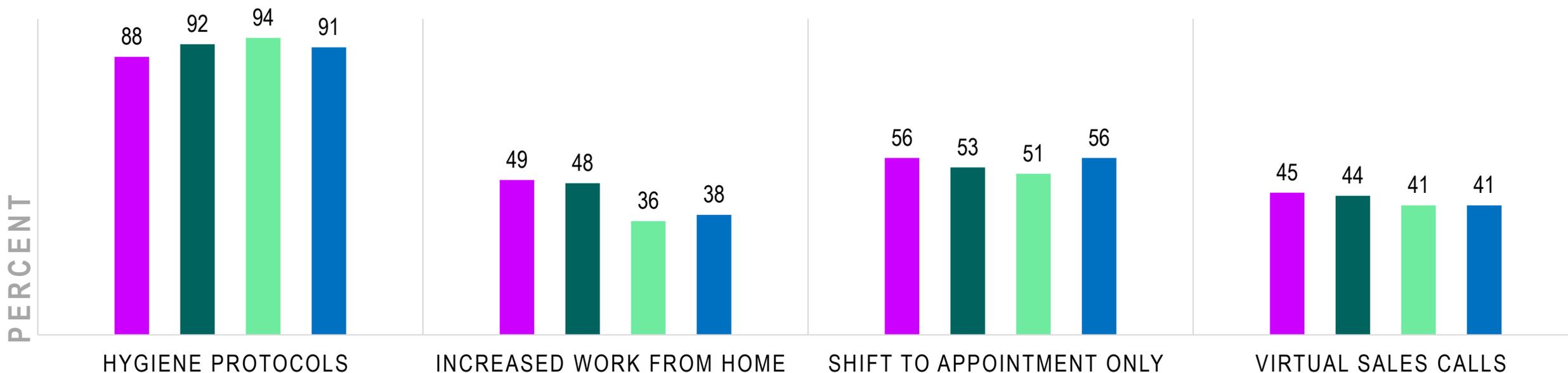
HOW LIKELY ARE YOU TO ATTEND THESE TRADE SHOWS IN THE FIRST HALF OF 2021 ASSUMING THEY ARE LIVE, IN-PERSON EVENTS?



THE FUTURE

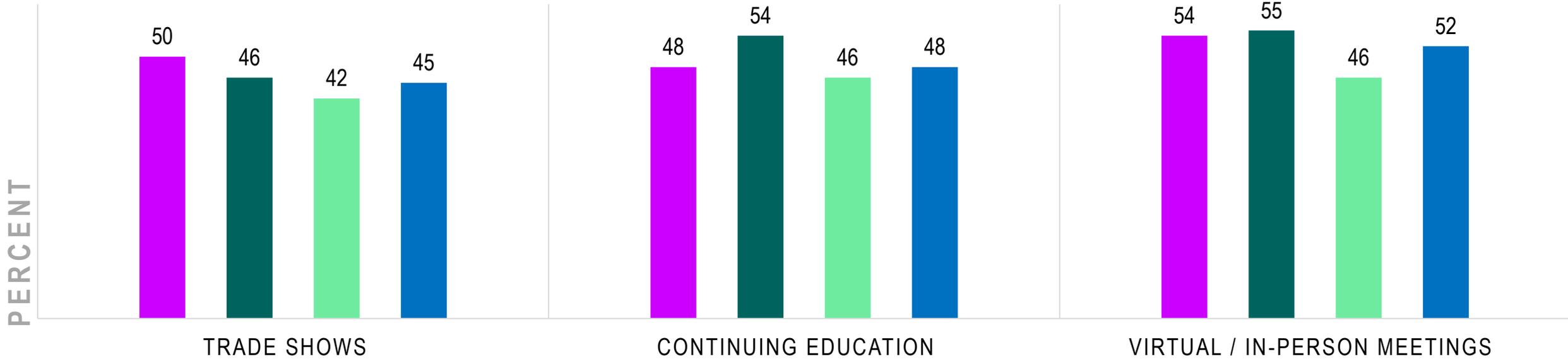
WHAT NEW PRACTICE PROCEDURES DO YOU EXPECT TO CONTINUE POST-COVID?

■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



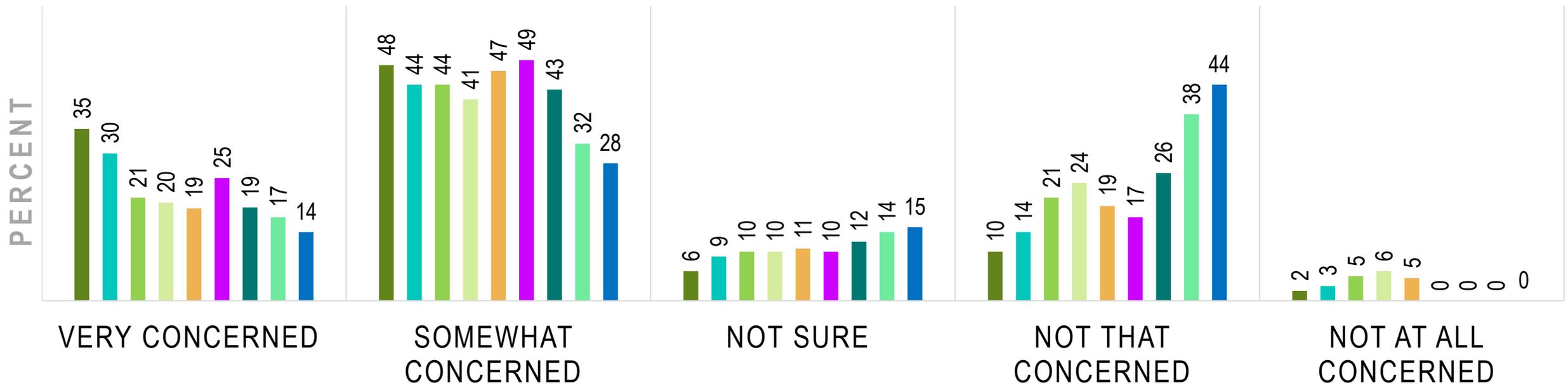
WHAT CHANGES INSTITUTED DUE TO COVID-19 HAVE CHANGED FOREVER?

■ Nov 24-30 ■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



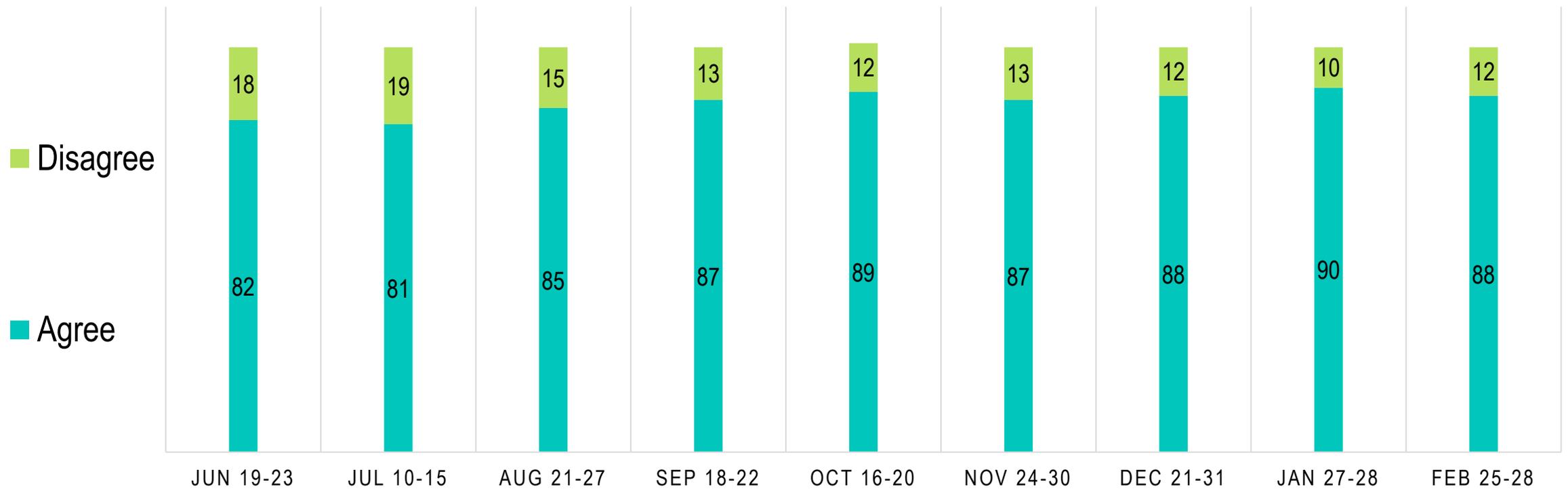
HOW CONCERNED ARE YOU ABOUT THE POSSIBILITY OF HAVING TO CLOSE YOUR BUSINESS (AGAIN) FOR ANOTHER SHUT-DOWN DUE TO COVID-19?

■ Jun 19-23
 ■ Jul 10-15
 ■ Aug 21-27
 ■ Sep 18-22
 ■ Oct 16-20
 ■ Nov 24-30
 ■ Dec 21-31
 ■ Jan 27-28
 ■ Feb 25-28



AGREE OR DISAGREE?

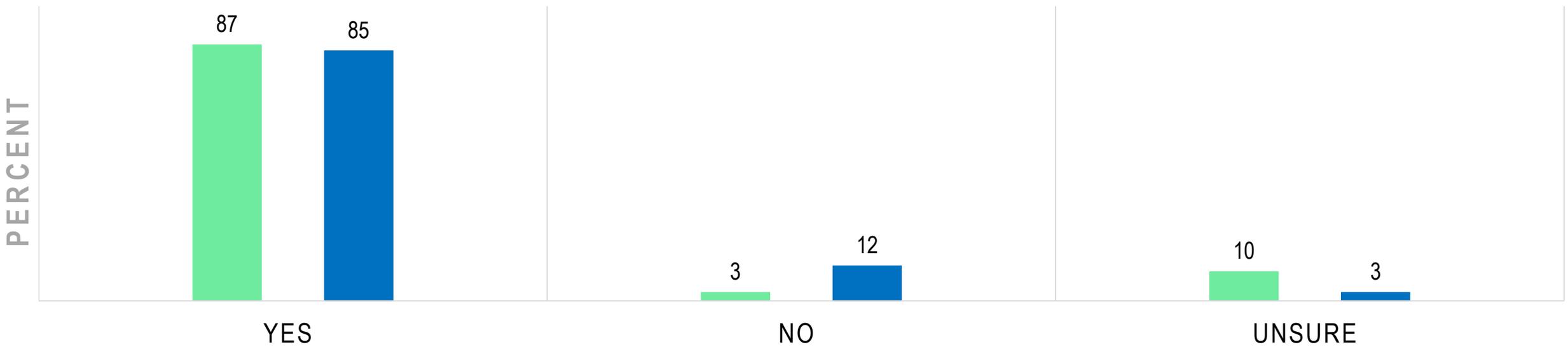
I WOULD ONLY CLOSE (AGAIN) IF MANDATED BY THE GOVERNMENT.



THE VACCINE

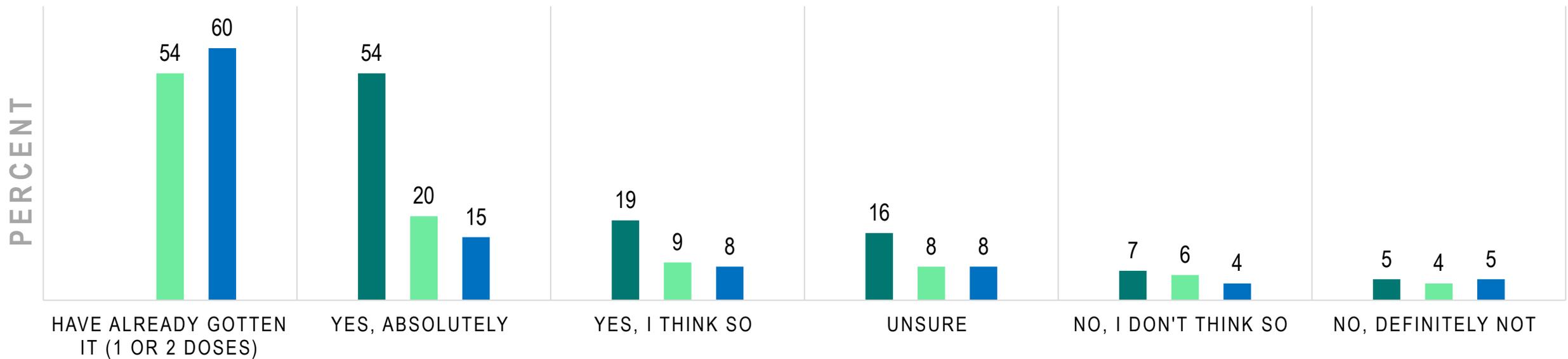
ARE ECPS ELIGIBLE TO RECEIVE THE COVID-19 VACCINE IN YOUR STATE?

■ Jan 27-28 ■ Feb 25-28



ARE YOU PLANNING TO GET THE COVID-19 VACCINE WHEN IT BECOMES AVAILABLE TO YOU?

■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

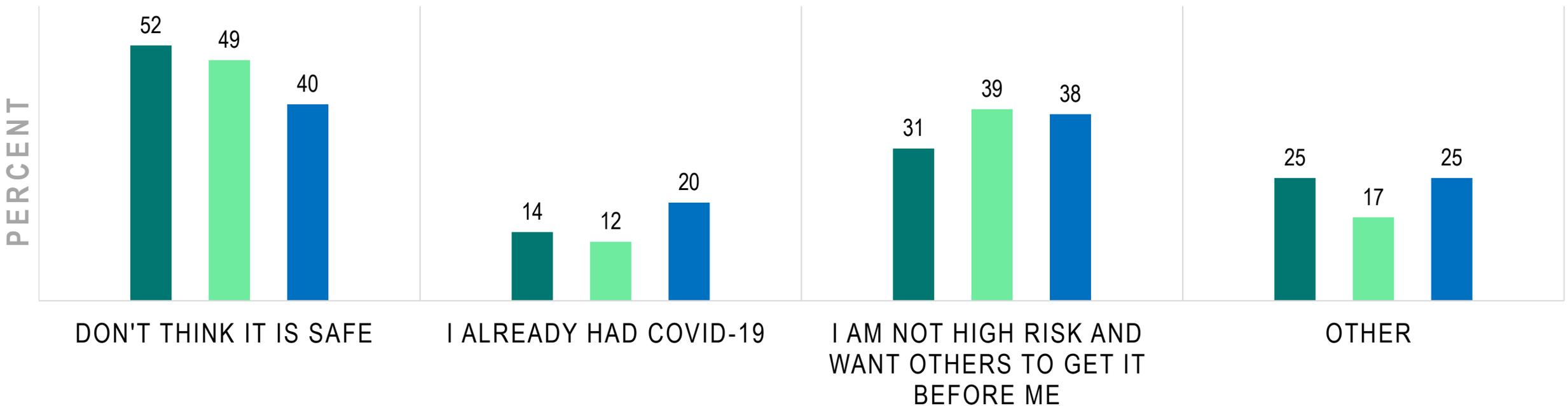


IF NOT PLANNING TO GET THE COVID-19 VACCINE:

WHY NO?

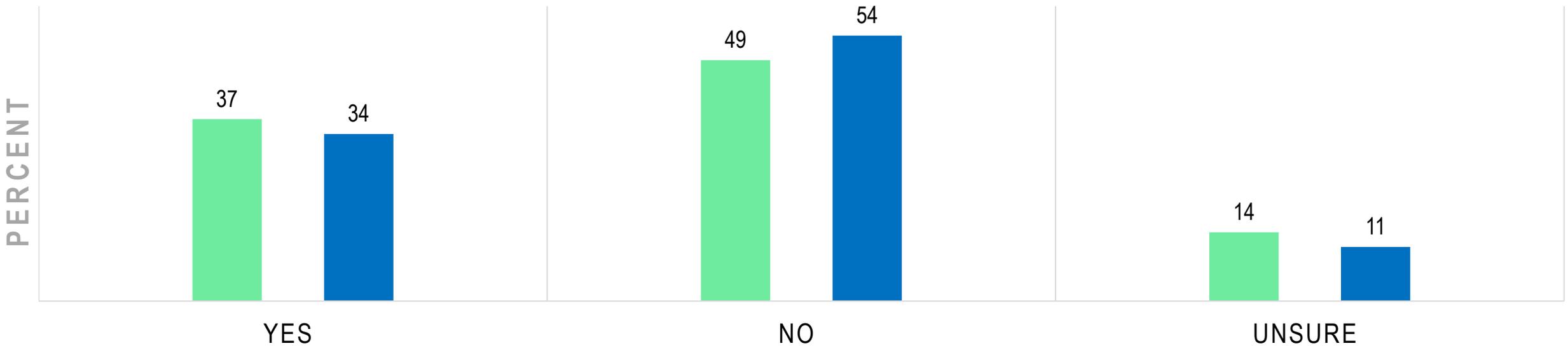
Check all that apply.

■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



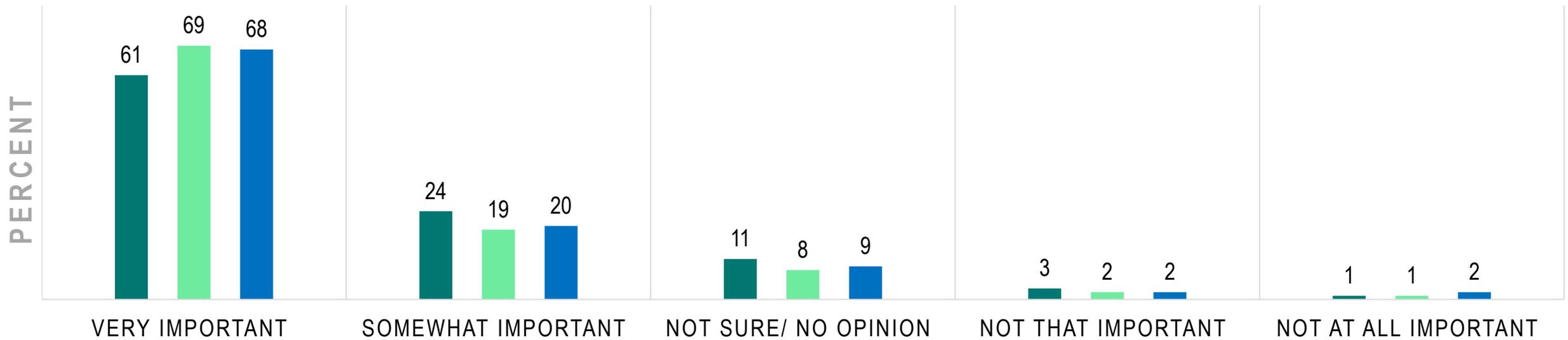
HAVE YOU OR ANY ELIGIBLE STAFF AT YOUR LOCATION BEEN UNABLE TO SCHEDULE A VACCINE APPOINTMENT?

■ Jan 27-28 ■ Feb 25-28



HOW WOULD YOU RATE THE IMPORTANCE OF THE AVAILABILITY OF A COVID-19 VACCINE TO FULL BUSINESS RECOVERY?

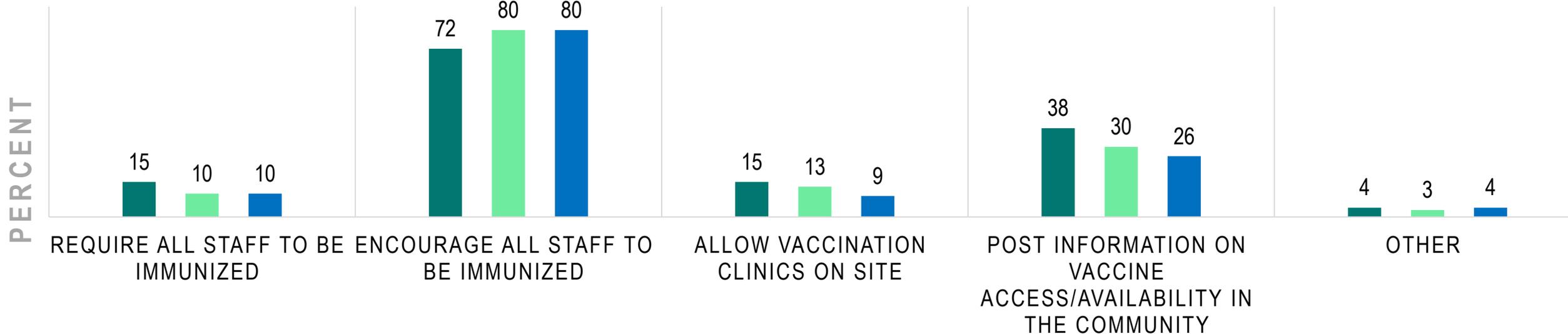
■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



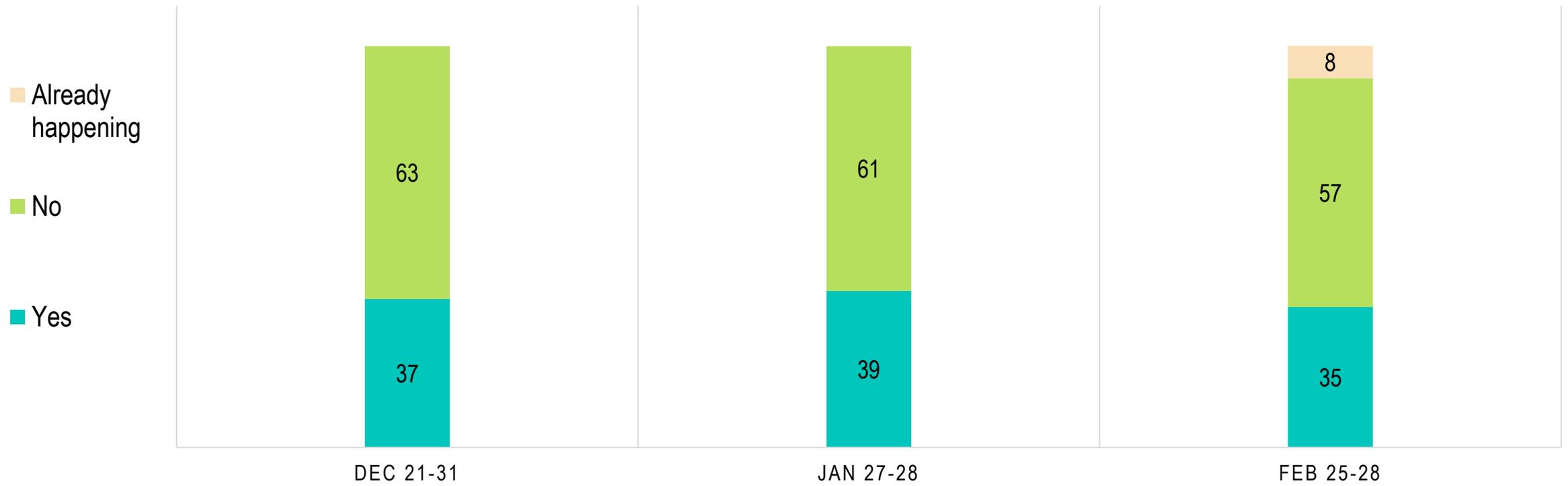
HOW ELSE MIGHT YOUR OFFICE BE INVOLVED WITH COVID-19 IMMUNIZATION EFFORTS?

Check all that apply.

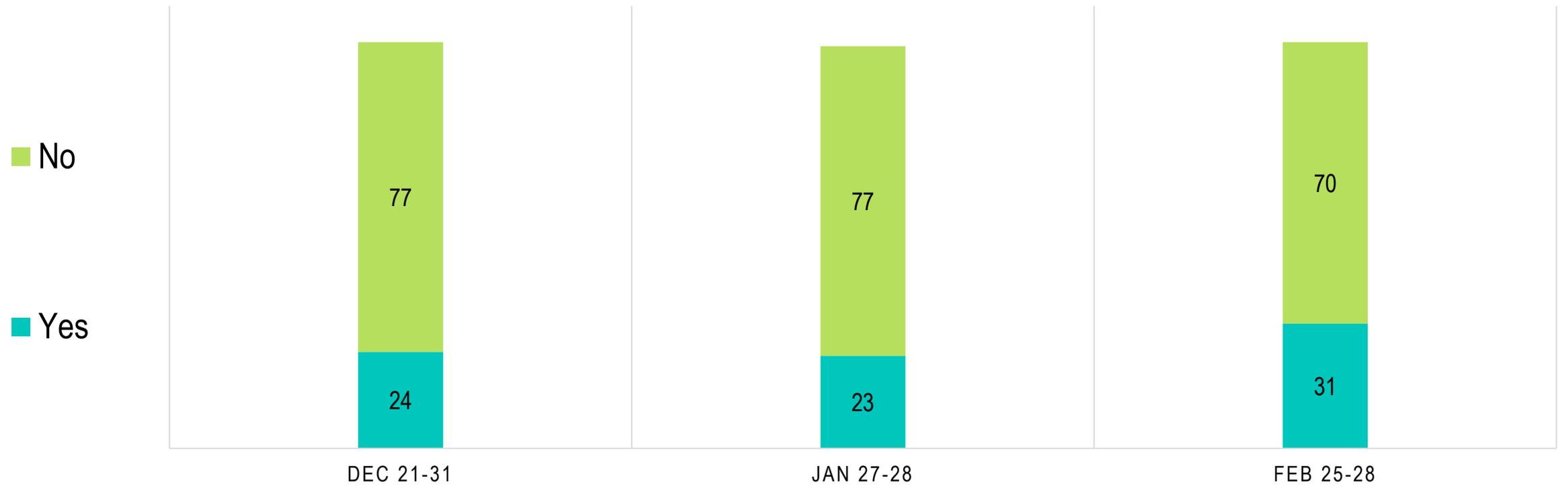
■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



WOULD YOU LIKE TO SEE OPTOMETRISTS OFFER COVID-19 VACCINES IN YOUR STATE?



ARE YOU AWARE OF INITIATIVES IN YOUR STATE ADVOCATING FOR THIS?

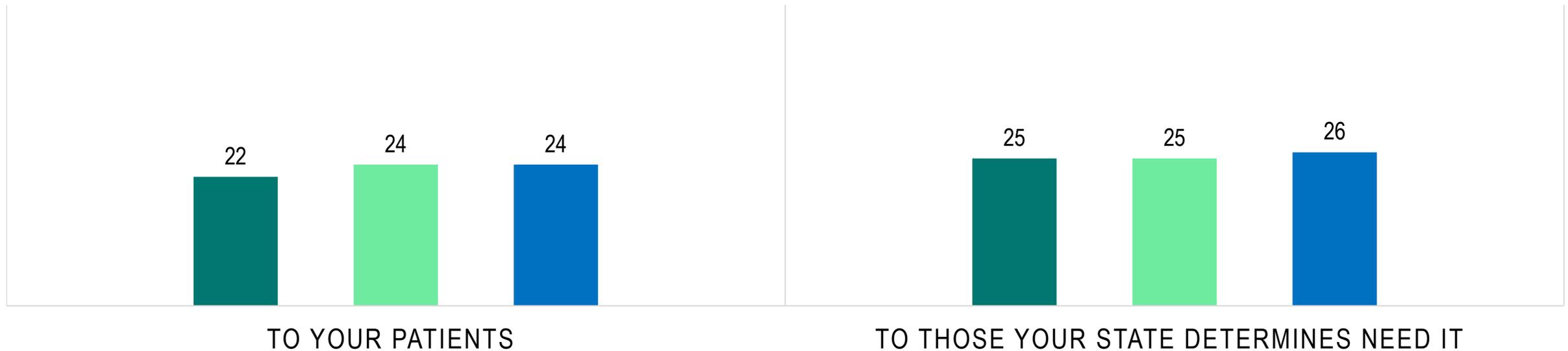


WOULD YOU PERSONALLY WANT TO DELIVER A COVID-19 VACCINE?

Check all that apply.

■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28

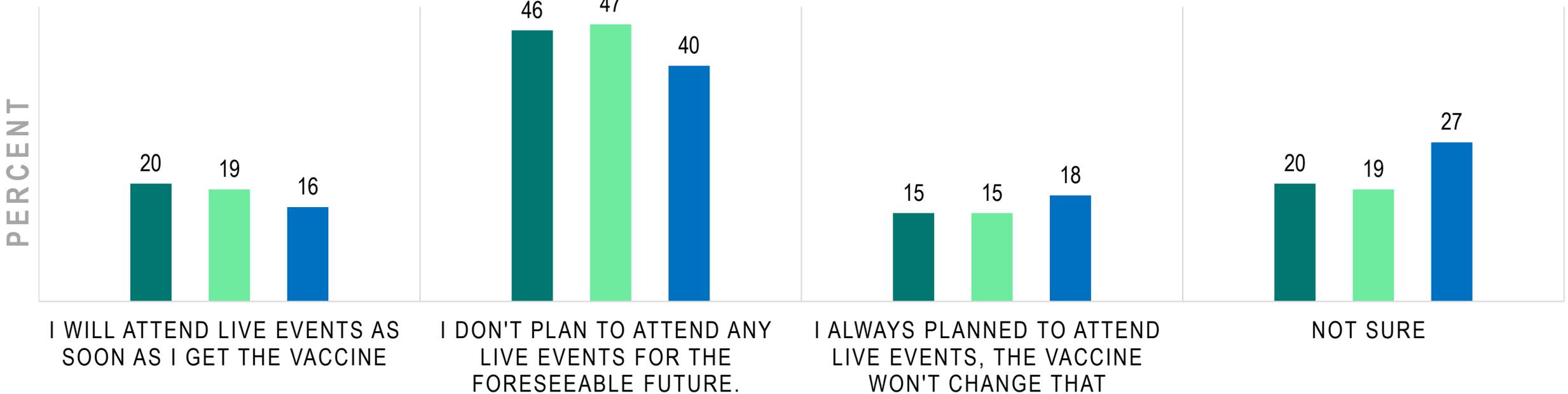
PERCENT



DOES THE INTRODUCTION OF THE VACCINE CHANGE YOUR PLANS ABOUT WHEN YOU WILL NEXT ATTEND A LIVE INDUSTRY EVENT?

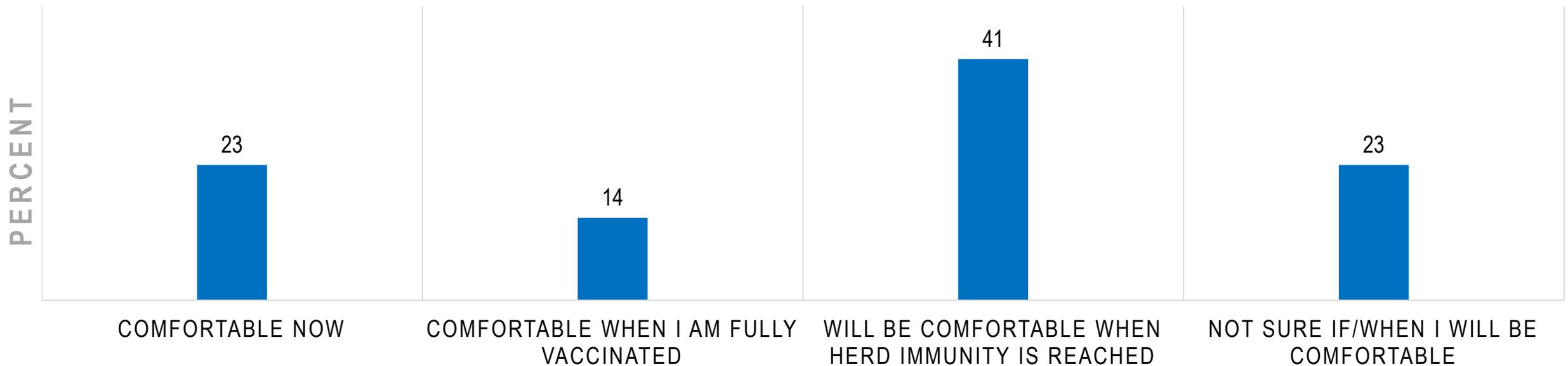
Check all that apply.

■ Dec 21-31 ■ Jan 27-28 ■ Feb 25-28



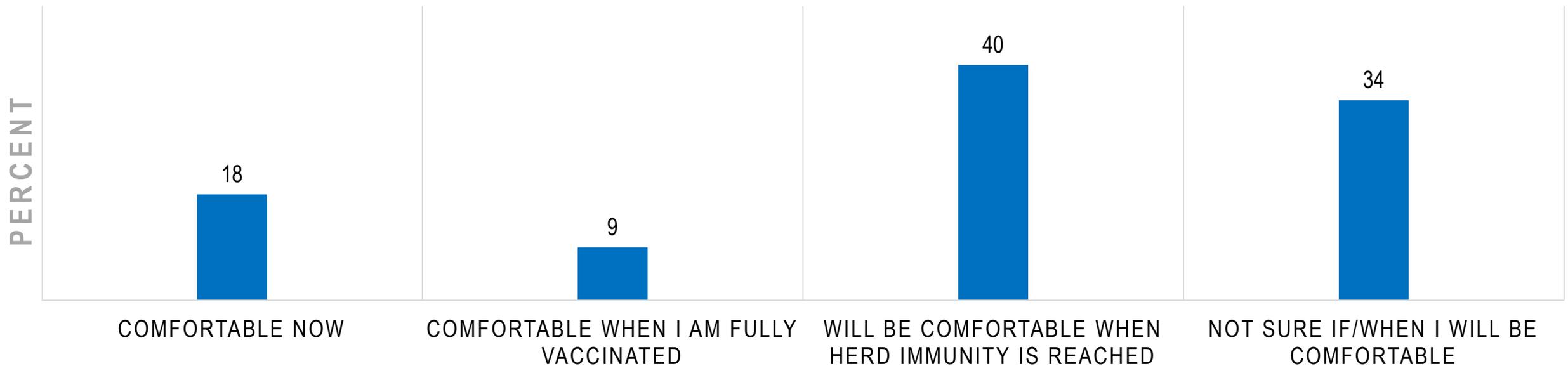
HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? **ATTENDING TRADE SHOWS**

■ Feb 25-28



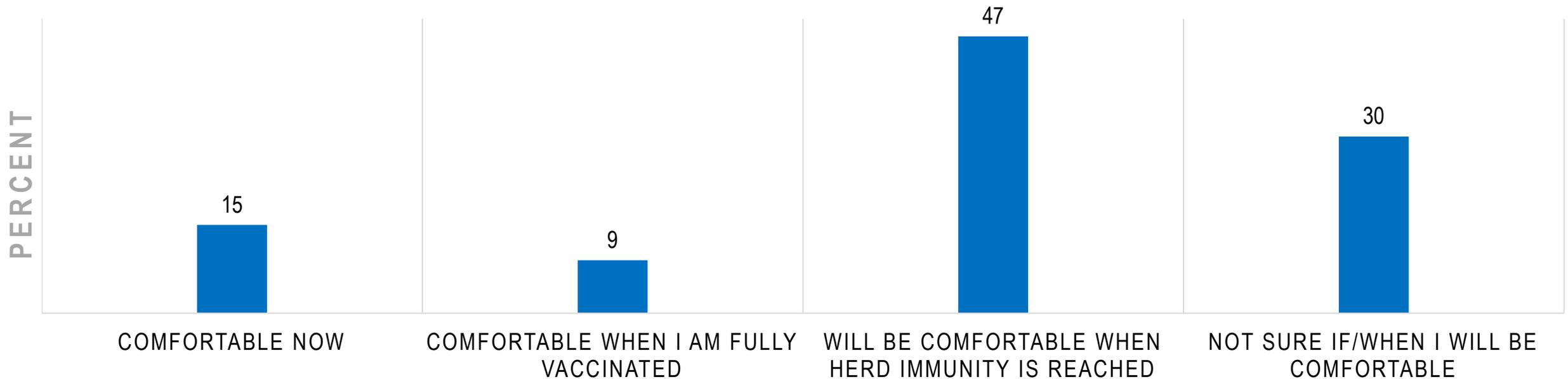
HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? RELAXING SANITATION AND CLEANING MEASURES

■ Feb 25-28



HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? **REDUCING PPE USE IN THE OFFICE**

■ Feb 25-28



HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? HAVING REPS VISIT THE OFFICE AGAIN

■ Feb 25-28

