

# CORONAVIRUS ECP STUDY



Wave 24

Jun 2021

# RESPONDENTS

This survey was asked in several waves.

- 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.

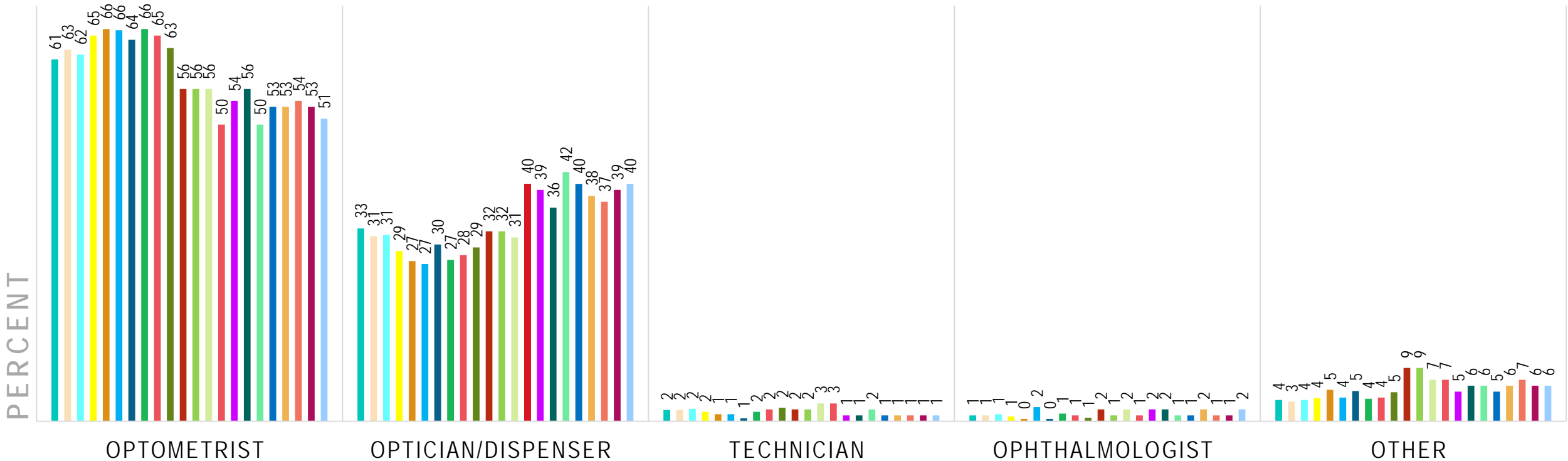
Questions varied slightly in each wave.

Comparisons are shown wherever possible.

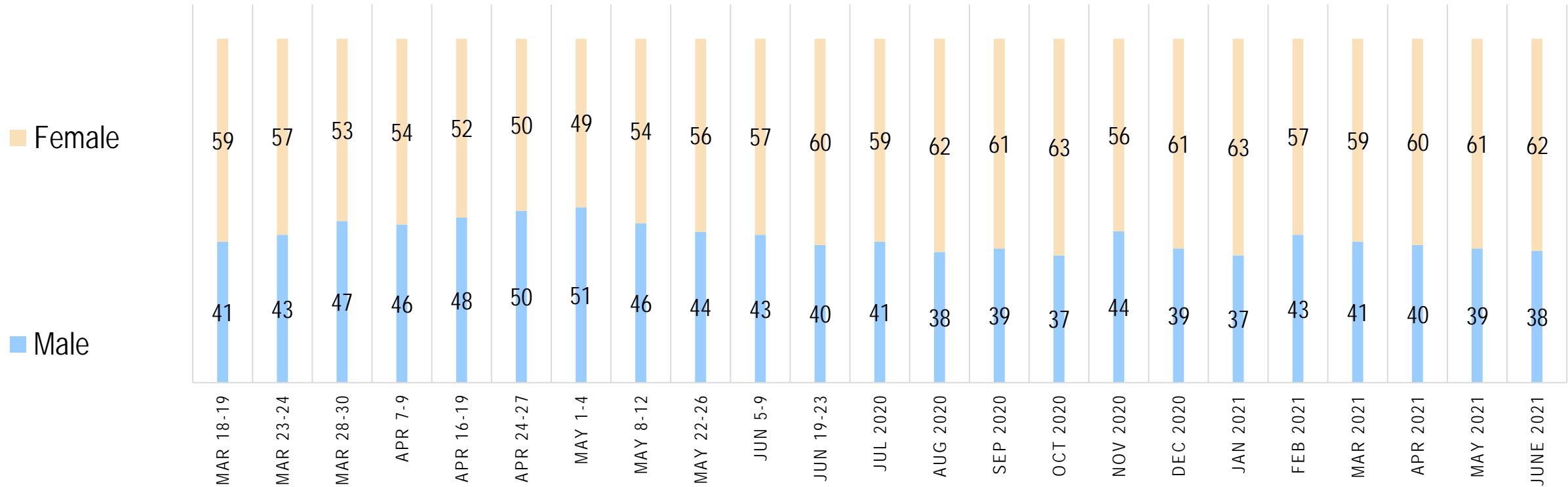
- Wave 13 ran from Jul 10-15, 2020. 497 completes.
- Wave 14 ran from Aug 21 – 27, 2020. 576 completes.
- Wave 15 ran from Sep 18-22, 2020. 638 completes.
- Wave 16 ran from Oct 16-20, 2020. 771 completes.
- Wave 17 ran from Nov 24-30, 2020. 619 completes.
- Wave 18 ran from Dec 21-31, 2020. 500 completes.
- Wave 19 ran from Jan 27-29, 2021. 503 completes.
- Wave 20 ran from Feb 25-28, 2021. 475 completes.
- Wave 21 ran from Mar 26-30, 2021. 645 completes.
- Wave 22 ran from Apr 26-30, 2021. 515 completes.
- Wave 23 ran from May 26-28, 2021. 719 completes.
- Wave 24 ran from June 26-28, 2021. 497 completes.

# RESPONDENT DEMOGRAPHICS

# RESPONDENT PROFESSION

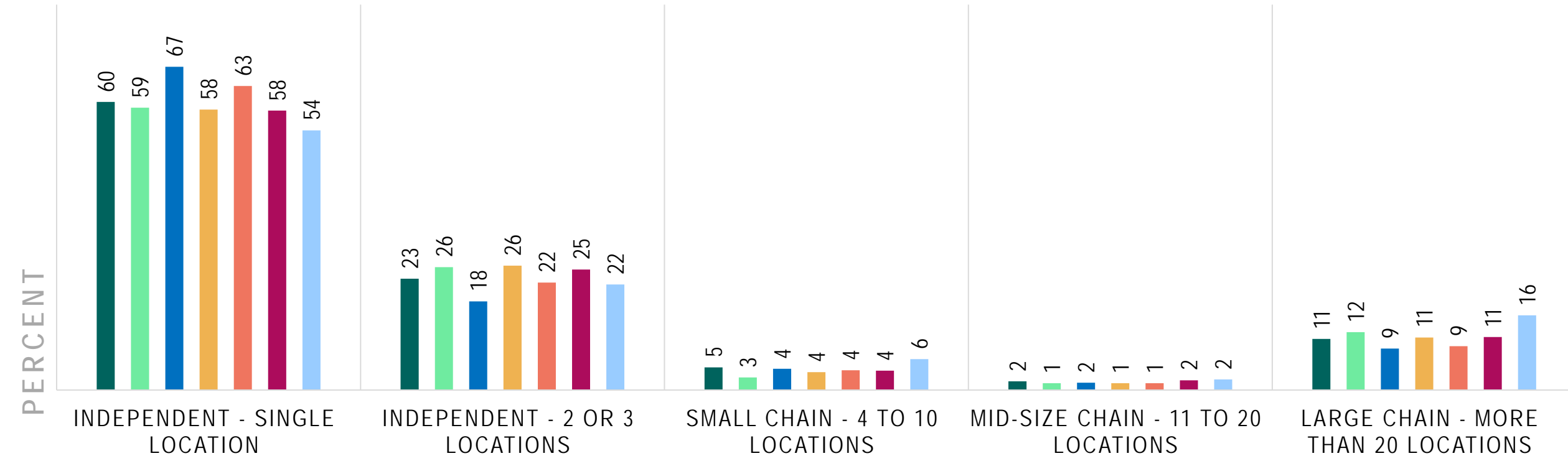


# GENDER



# LOCATION TYPE

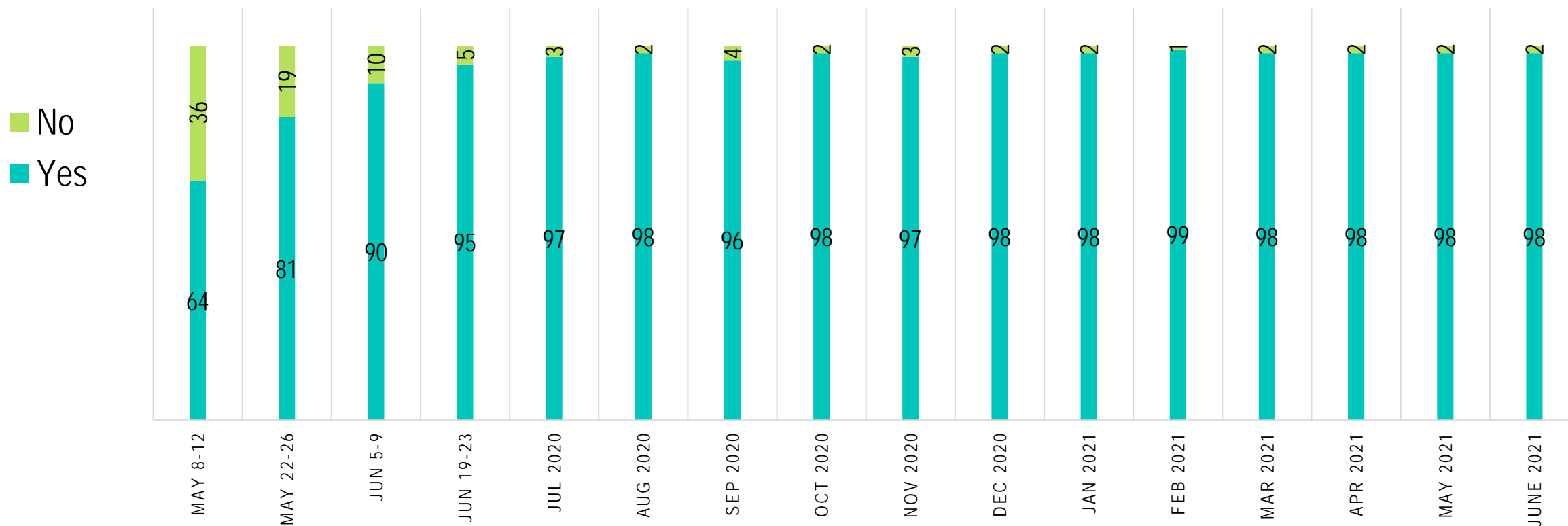
■ Dec 2020   ■ Jan 2021   ■ Feb 2021   ■ Mar 2021   ■ Apr 2021   ■ May 2021   ■ Jun 2021



# PRACTICE STATUS

# LOCATION OPEN?

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

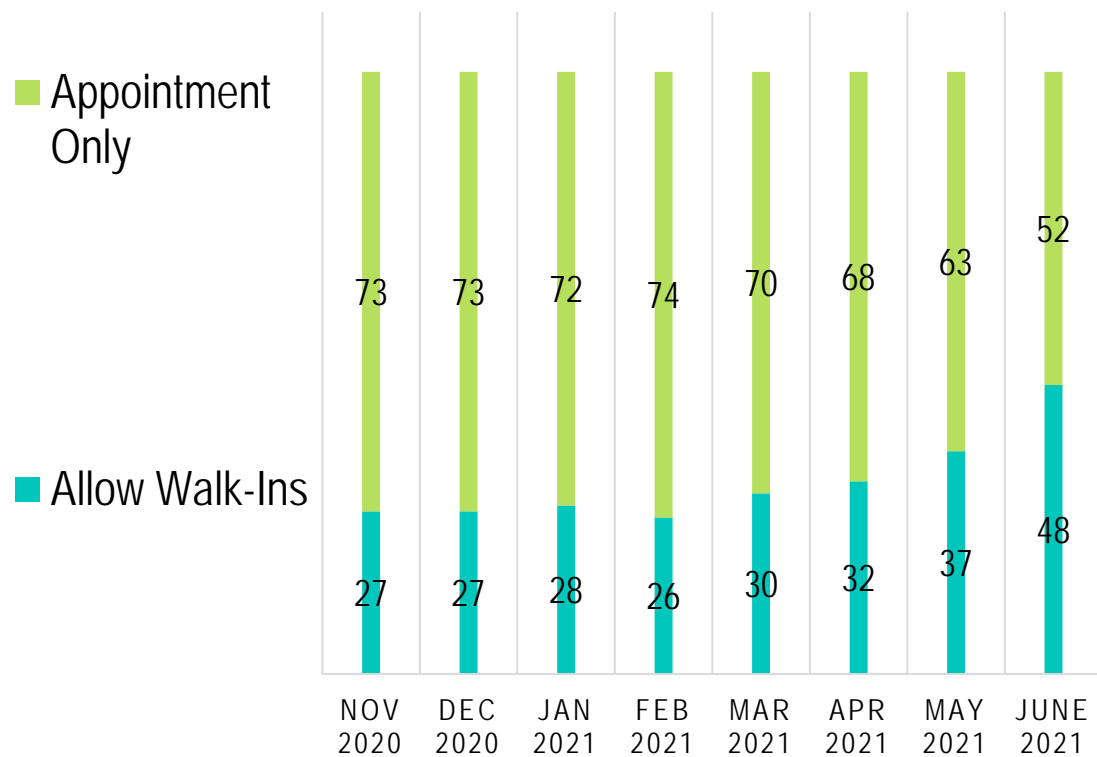




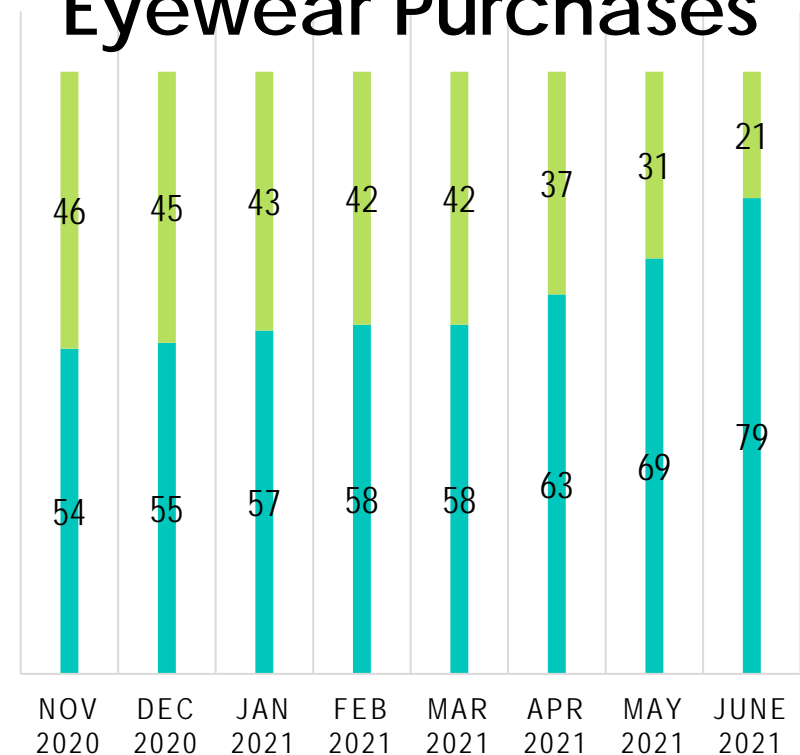
# PRACTICES

# WALK-INS VS. APPOINTMENTS

## For Eye Exams

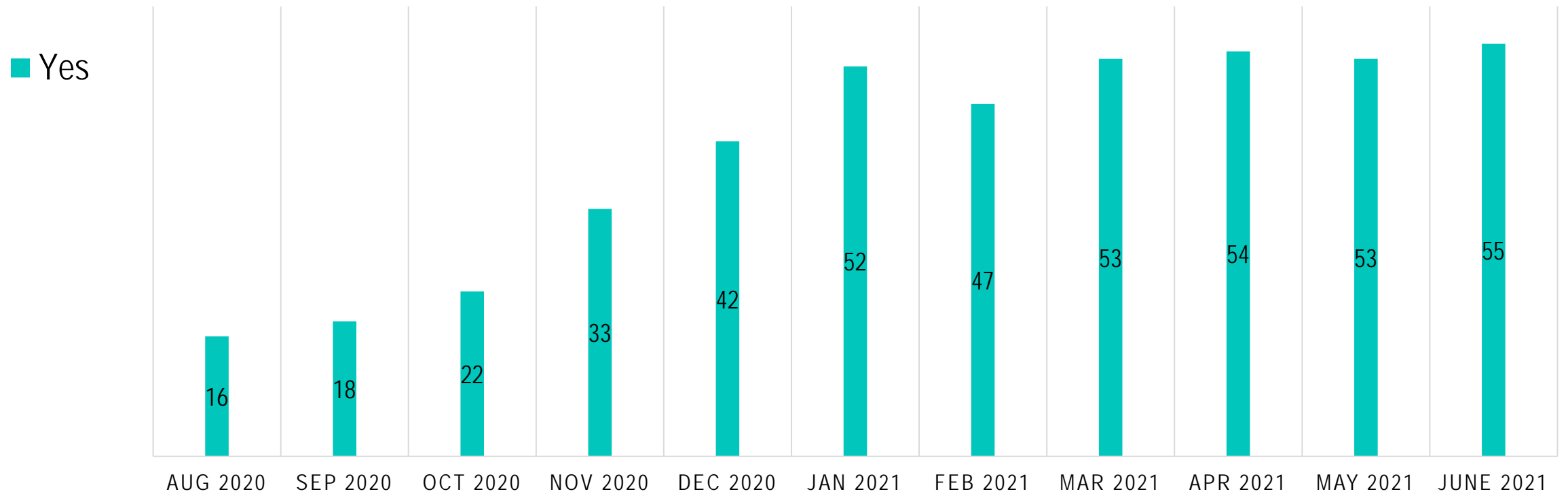


## For Dispensing/ Eyewear Purchases



# STAFF

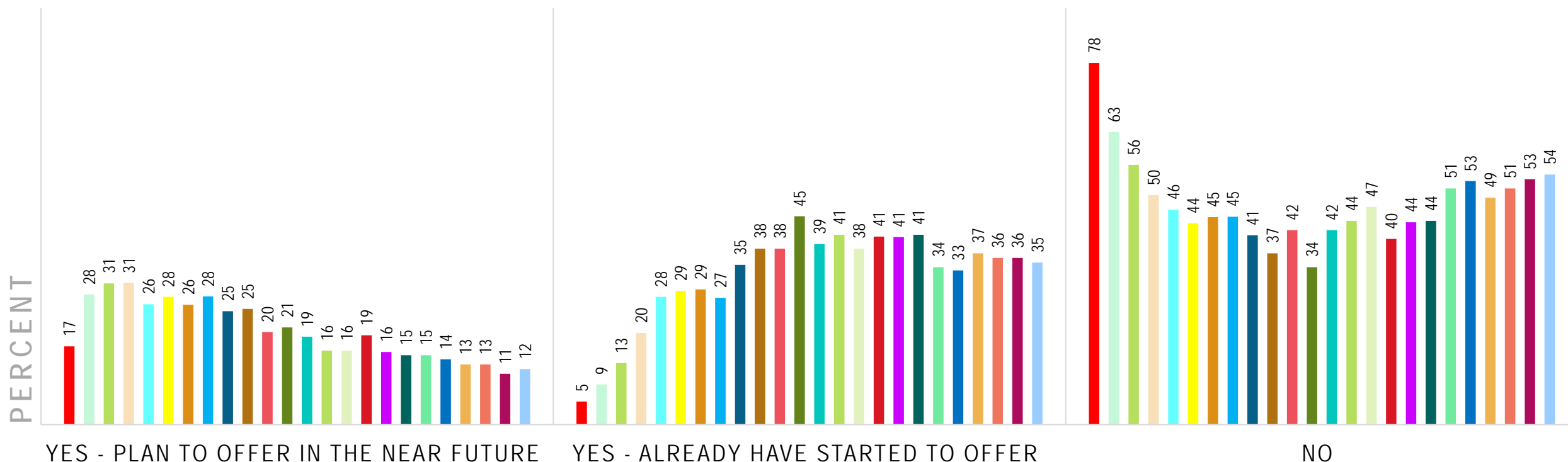
# HAS ANYONE WHO WORKS AT YOUR LOCATION GOTTEN COVID-19?



# TELEHEALTH

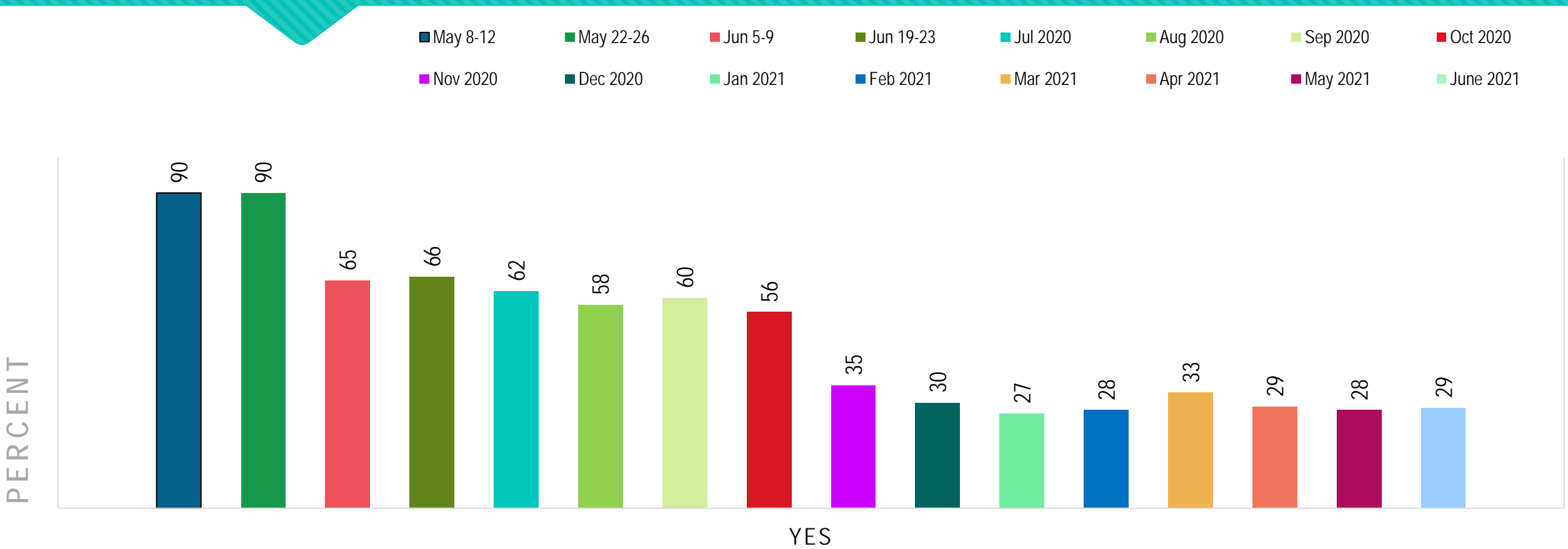
# HAS THE CORONAVIRUS INFLUENCED YOUR CONSIDERATION OF OFFERING TELEHEALTH SERVICES/OPTIONS?

■ 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 2020   ■ Aug 2020   ■ Sep 2020   ■ Oct 2020  
 ■ Nov 2020   ■ Dec 2020   ■ Jan 2021   ■ Feb 2021   ■ Mar 2021   ■ Apr 2021   ■ May 2021   ■ June 2021



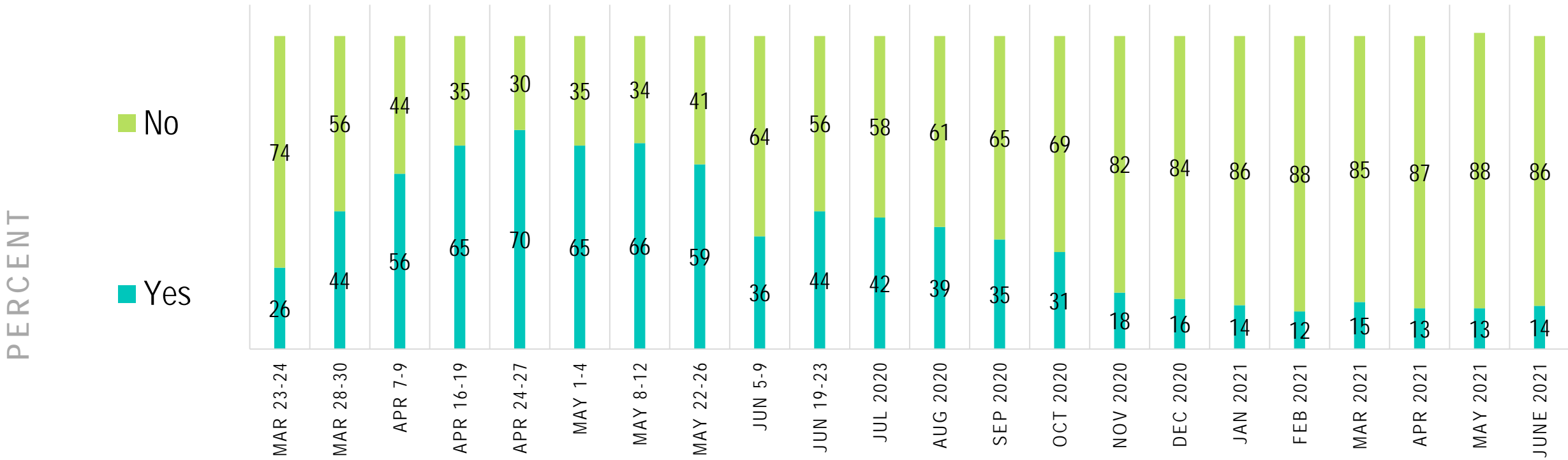
If currently offering telehealth:

# PLANS TO INTEGRATE TELEHEALTH INTO THE PRACTICE ON A REGULAR BASIS



If currently offering telehealth:

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

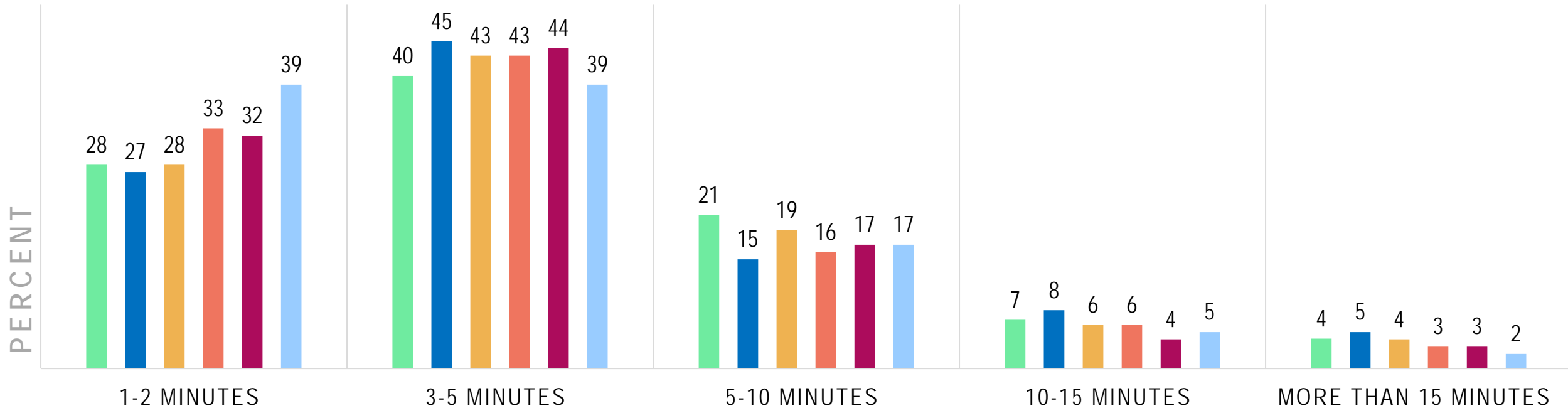




# CLEANING & SANITATION

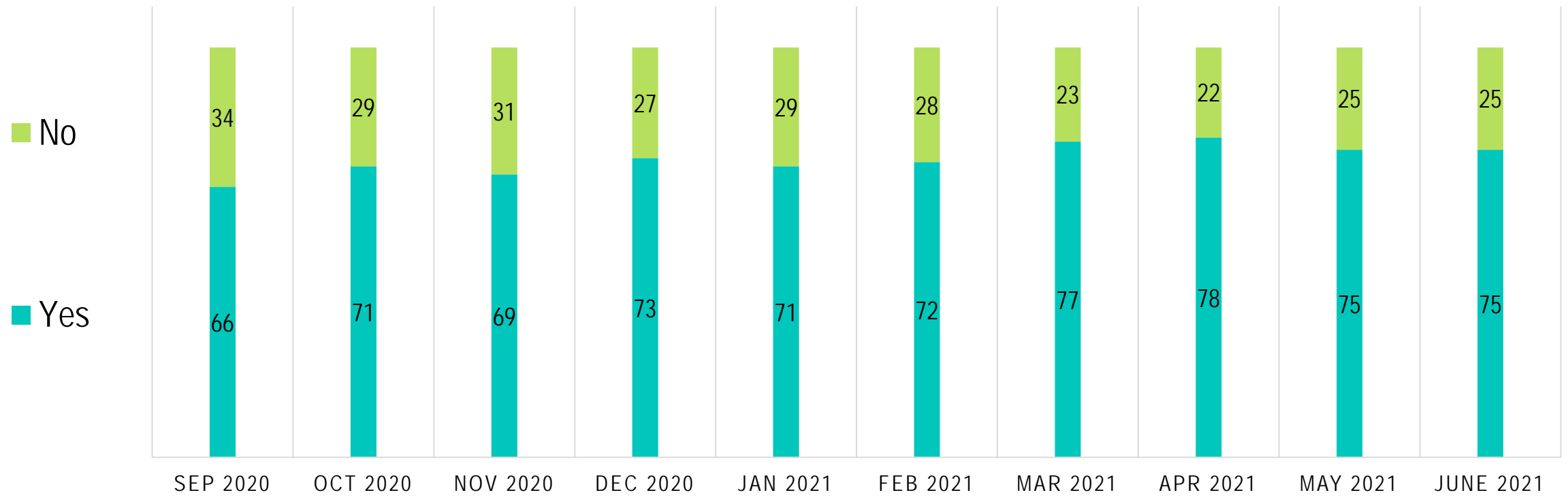
# APPROXIMATELY, HOW MUCH ADDITIONAL TIME DO YOU NOW ALLOCATE TO CLEANING THE OFFICE/EXAM ROOMS FOR EACH PATIENT?

Jan 2021 Feb 2021 Mar 2021 Apr 2021 May 2021 June 2021



# 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 2020

Sep 2020

Oct 2020

Nov 2020

Dec 2020

Jan 2021

Feb 2021

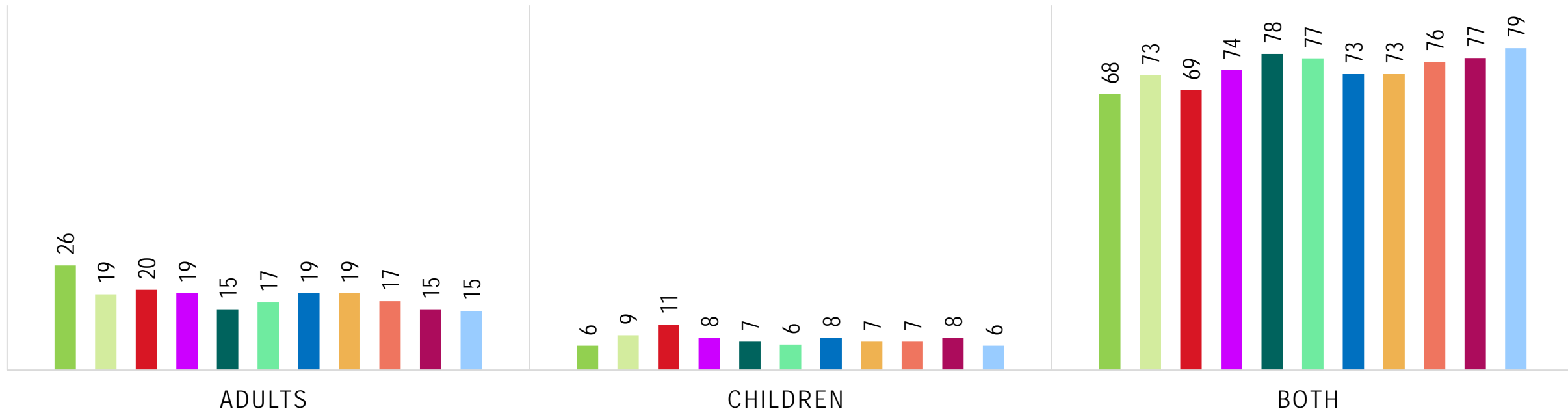
Mar 2021

Apr 2021

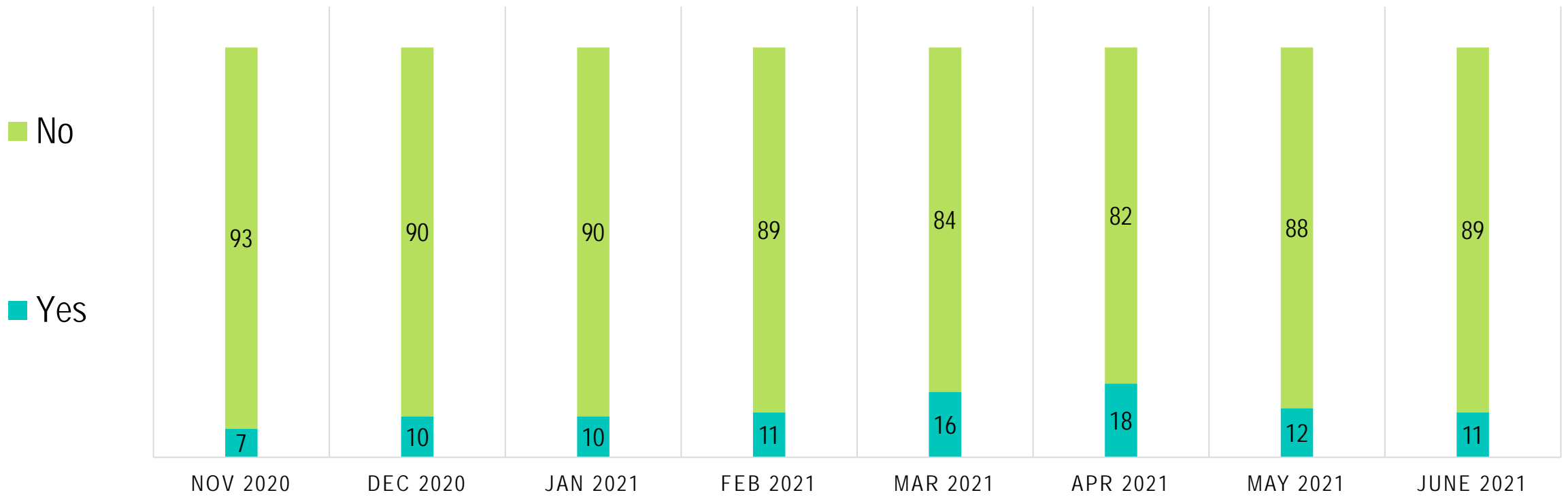
May 2021

June 2021

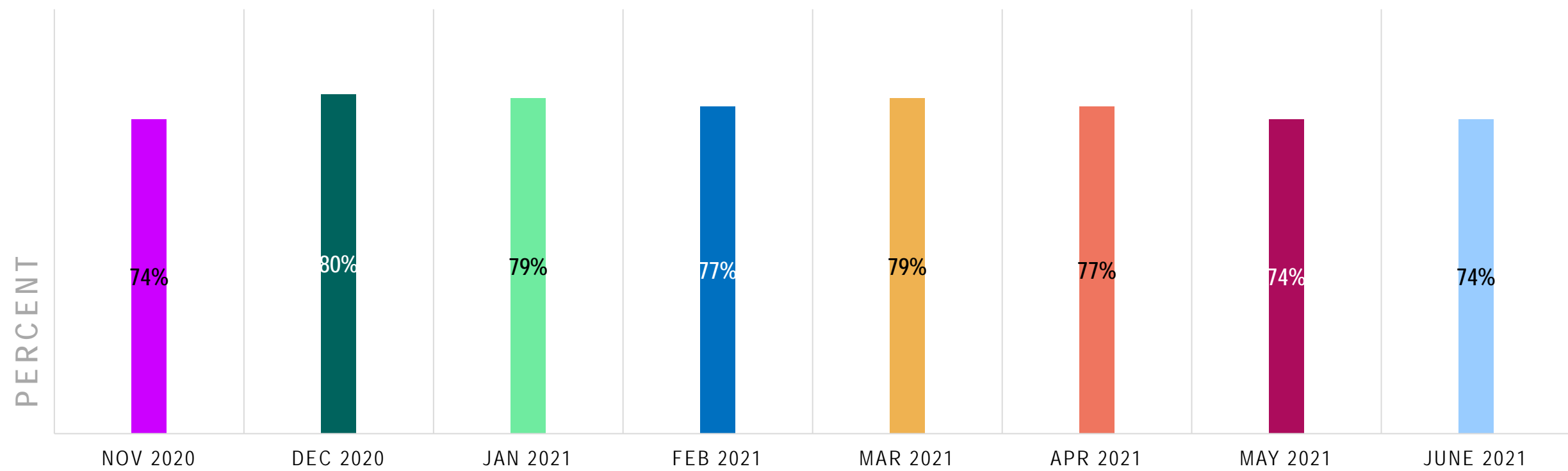
PERCENT



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



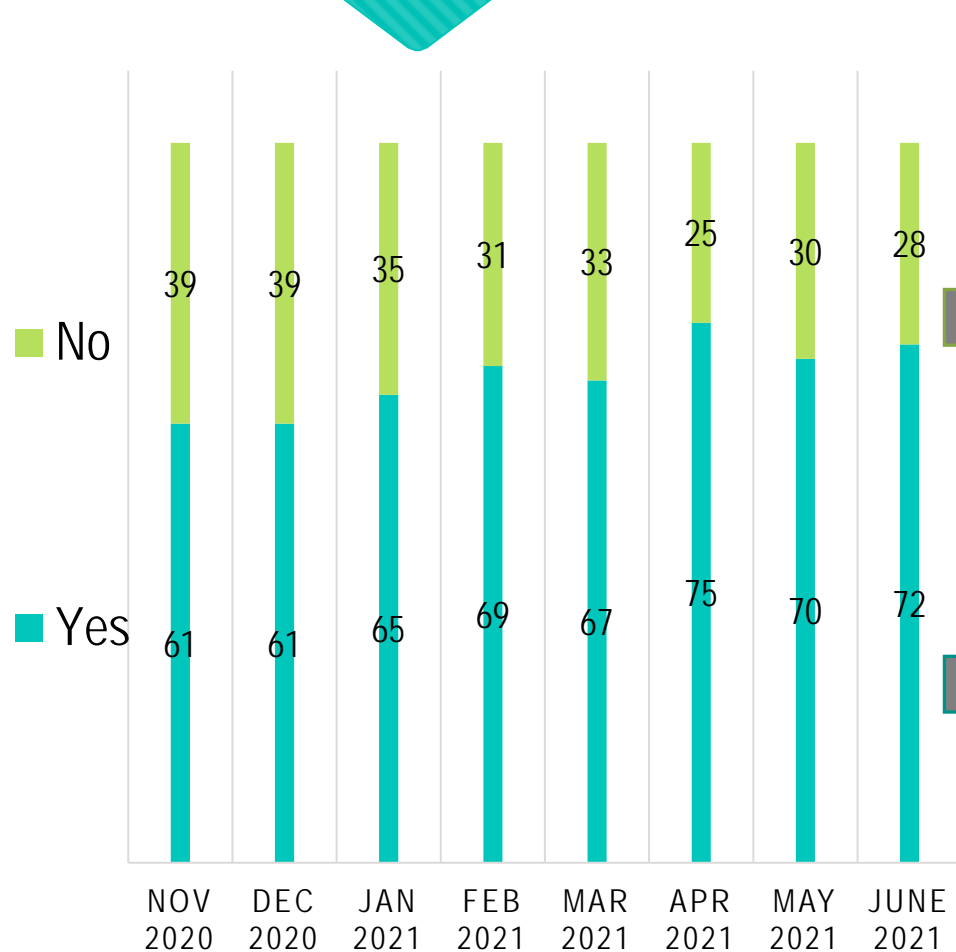
# WHAT PERCENT OF YOUR EYEGLOSS-WEARING PATIENTS COMPLAIN ABOUT LENSES FOGGING UP WHEN WEARING A MASK?



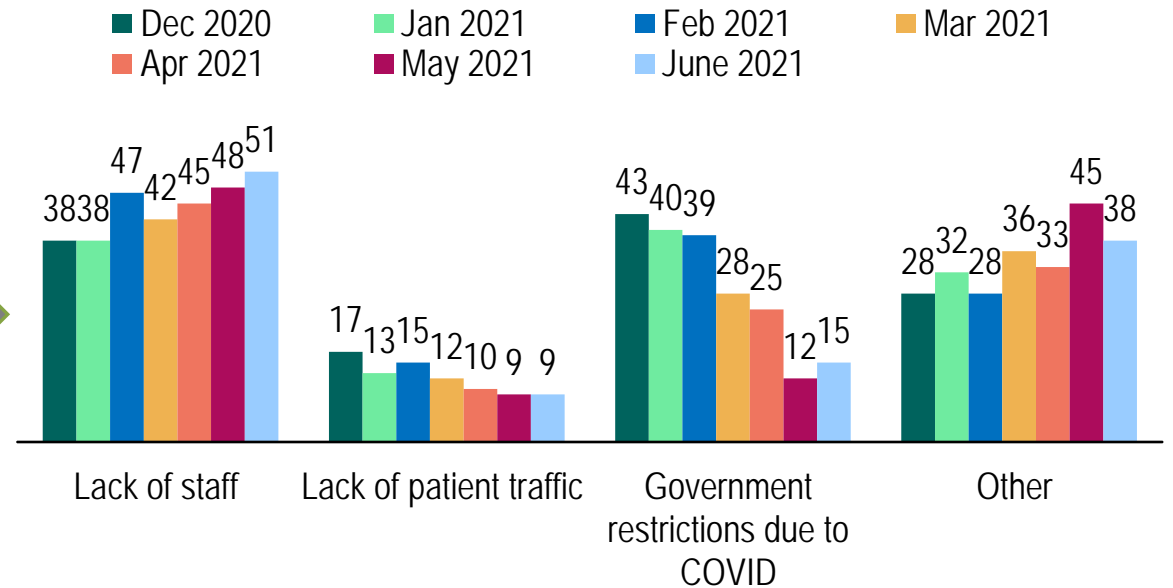
# PATIENT VOLUME



# 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  
 Average: 29% more  
 Average: 26% more  
 Average: 30% more  
 Average: 26% more

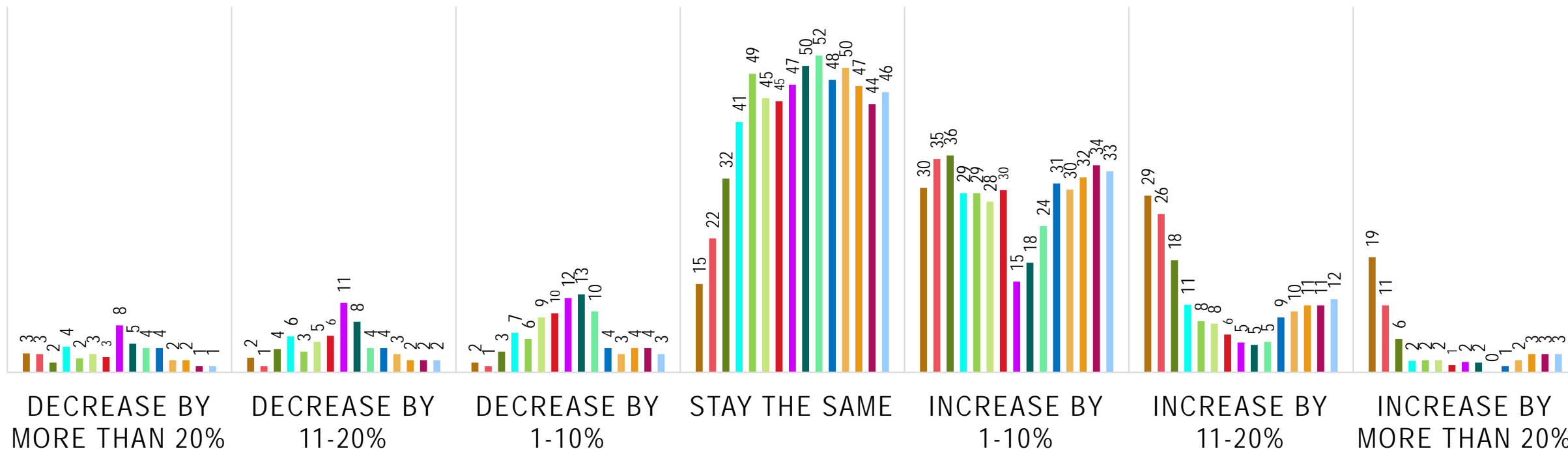
# YEAR OVER YEAR COMPARISONS

	MAR 2021 VS MAR 2020	MAR 2021 VS MAR 2019	APR 2021 VS APR 2020	APR 2021 VS APR 2019	MAY 2021 VS MAY 2020	MAY 2021 VS MAY 2019	JUNE 2021 VS JUNE 2020	JUNE 2021 VS JUNE 2019
PROFITABILITY PER PATIENT	+18%	-5%	+39%	-2%	+29%	-2%	+19%	-1%
# PATIENTS PER DAY	+22%	-8%	+48%	-6%	+34%	-4%	+22%	-3%
REVENUE	+23%	-4%	+48%	-3%	+34%	-1%	+21%	-2%
OPTICAL SALES	+24%	-3%	+48%	-2%	+35%	SAME	+21%	-1%
CAPTURE RATE	+14%	SAME	+36%	SAME	+23%	+1%	+13%	SAME

# 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 2020 ■ Aug 2020 ■ Sep 2020 ■ Oct 2020 ■ Nov 2020  
 ■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021

PERCENT

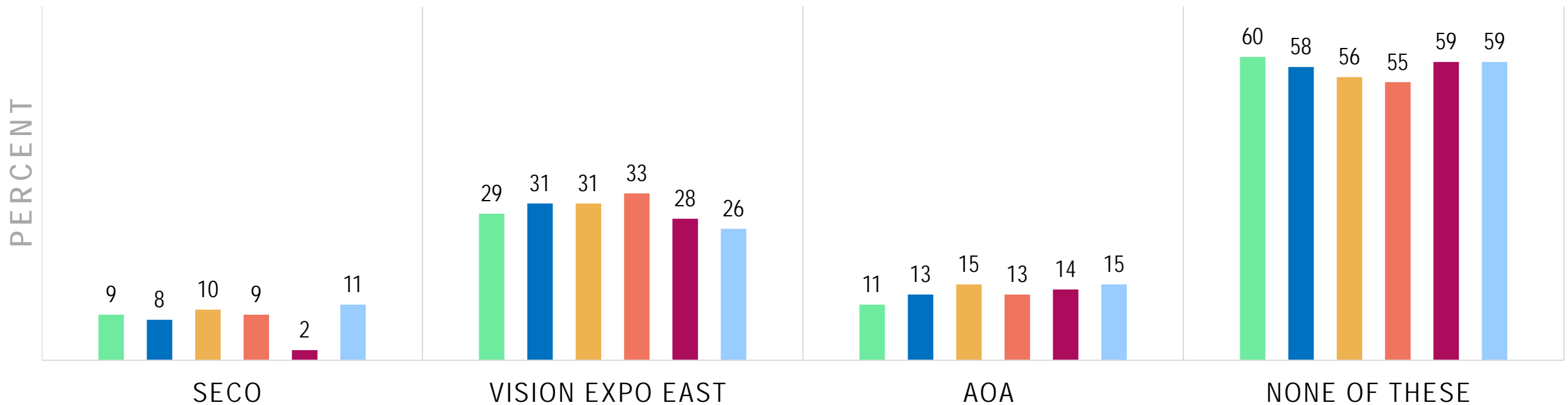


# TRADE SHOWS

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

*Check all that apply.*

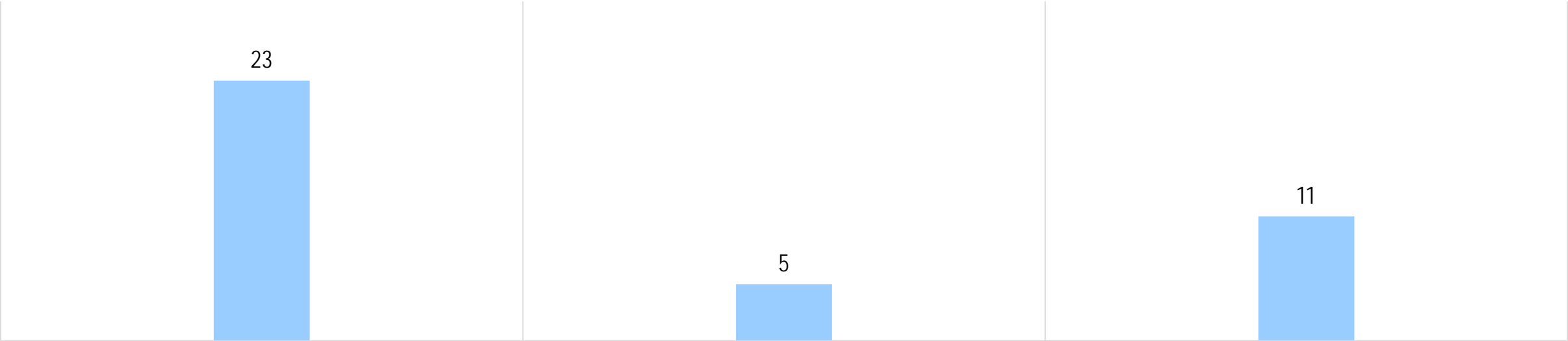
Jan 2021 Feb 2021 Mar 2021 Apr 2021 May 2021 June 2021



# DID YOU ATTEND THIS YEAR....?

■ June 2021

PERCENT



SECO  
*ASKED OF PAST ATTENDEES*

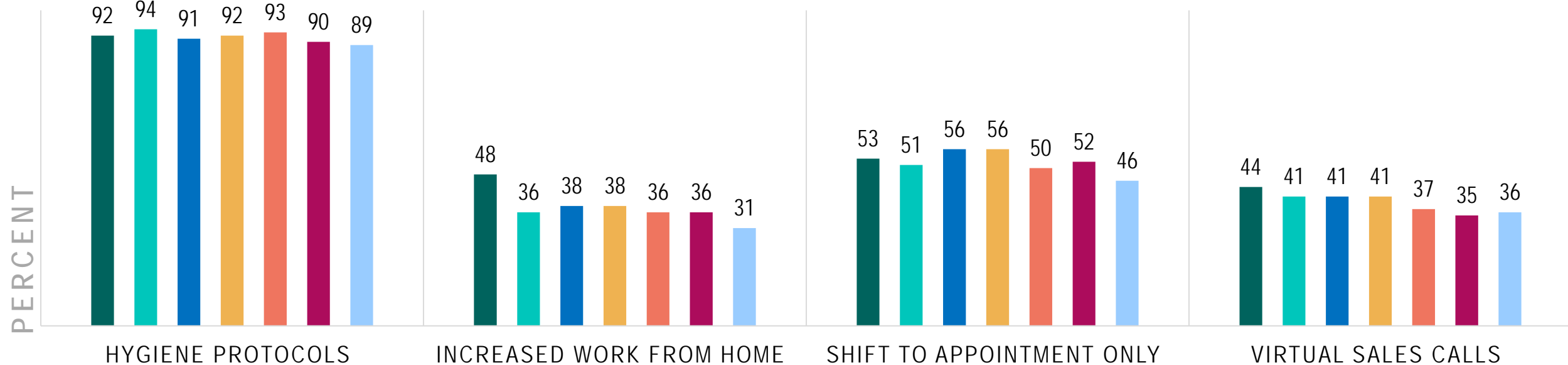
VISION EXPO EAST  
*ASKED OF ALL*

AOA  
*ASKED OF PAST ATTENDEES*

# THE FUTURE

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

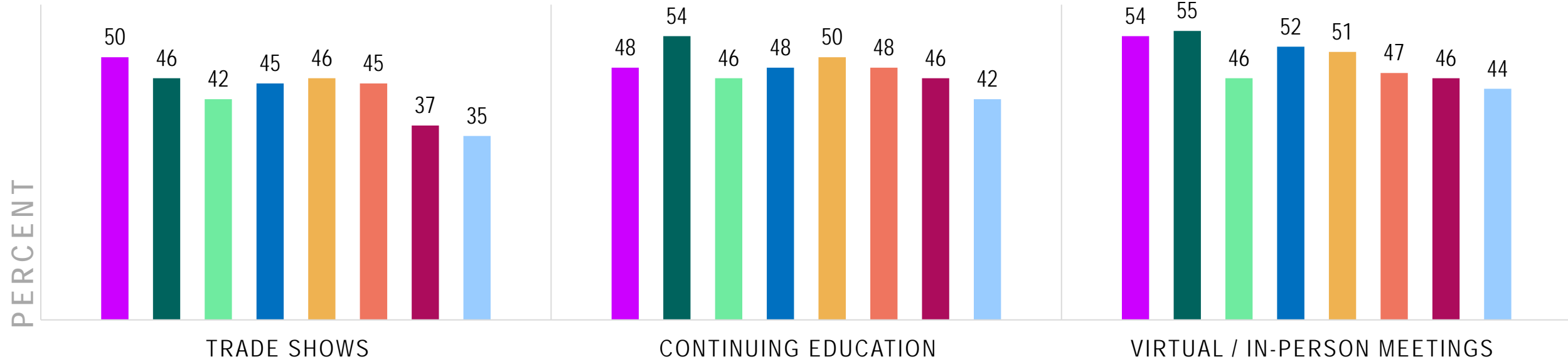
■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021





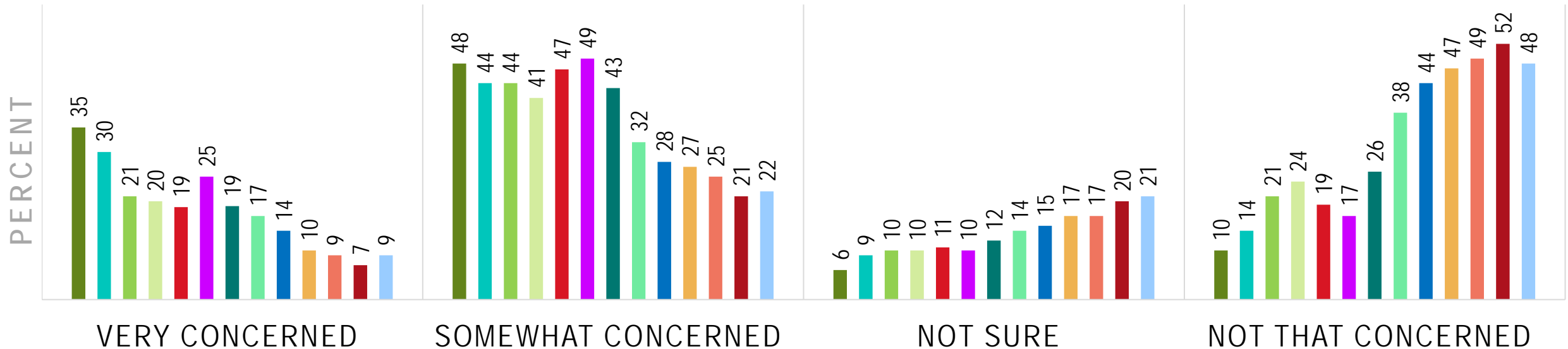
# WHAT CHANGES INSTITUTED DUE TO COVID-19 HAVE CHANGED FOREVER?

■ Nov 2020 ■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



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

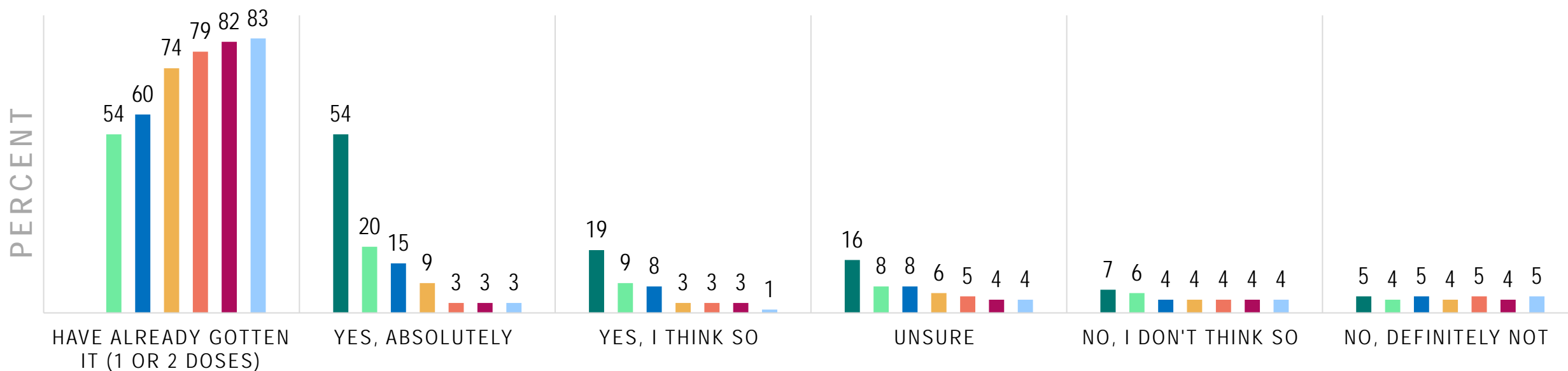
■ Jun 2020   ■ Jul 2020   ■ Aug 2020   ■ Sep 2020   ■ Oct 2020   ■ Nov 2020   ■ Dec 2020  
■ Jan 2021   ■ Feb 2021   ■ Mar 2021   ■ Apr 2021   ■ May 2021   ■ June 2021



# THE VACCINE

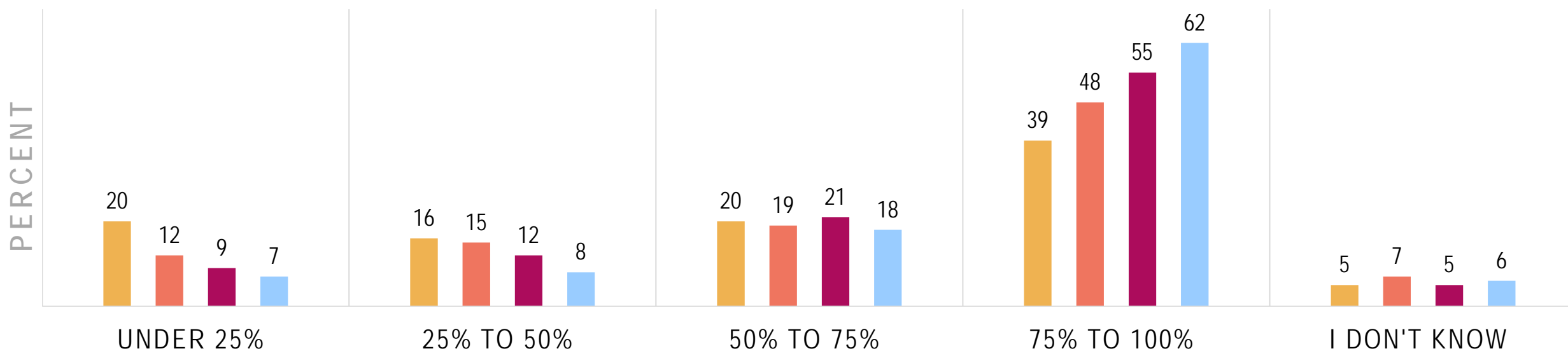
# ARE YOU PLANNING TO GET THE COVID-19 VACCINE WHEN IT BECOMES AVAILABLE TO YOU?

■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



# WHAT PERCENTAGE OF YOUR STAFF HAS BEEN VACCINATED?

■ Mar 2021 ■ April 2021 ■ May 2021 ■ June 2021

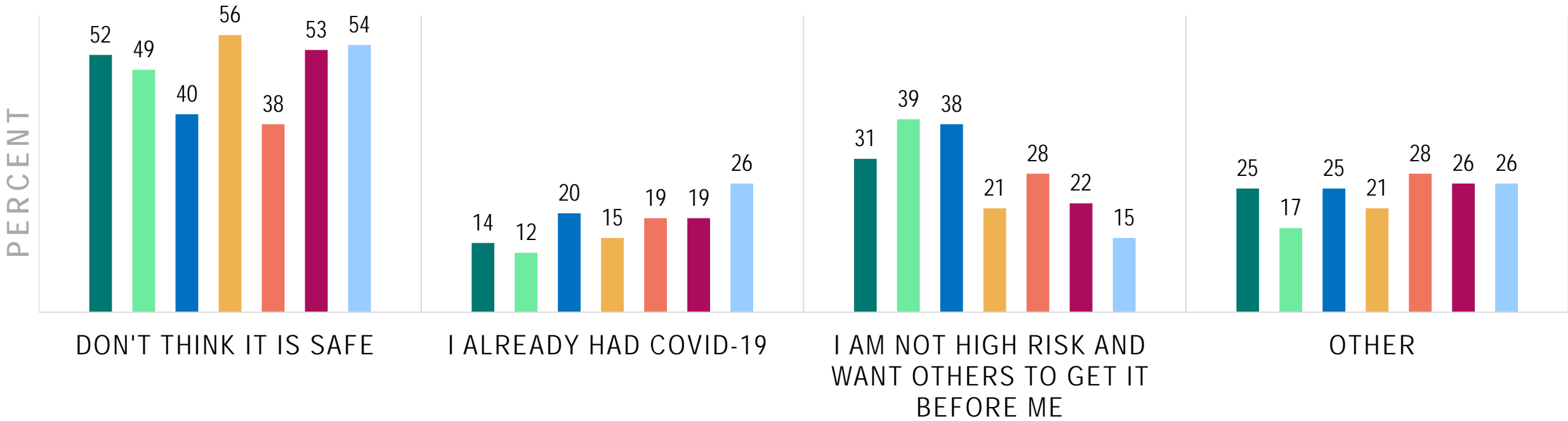


IF NOT PLANNING TO GET THE COVID-19 VACCINE:

# WHY NO?

Check all that apply.

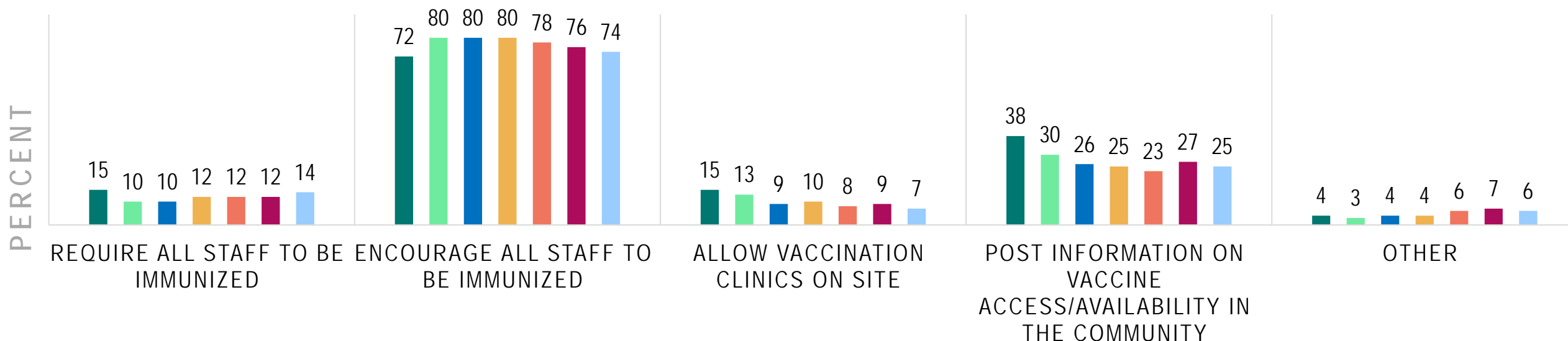
Dec 2020 Jan 2021 Feb 2021 Mar 2021 Apr 2021 May 2021 June 2021



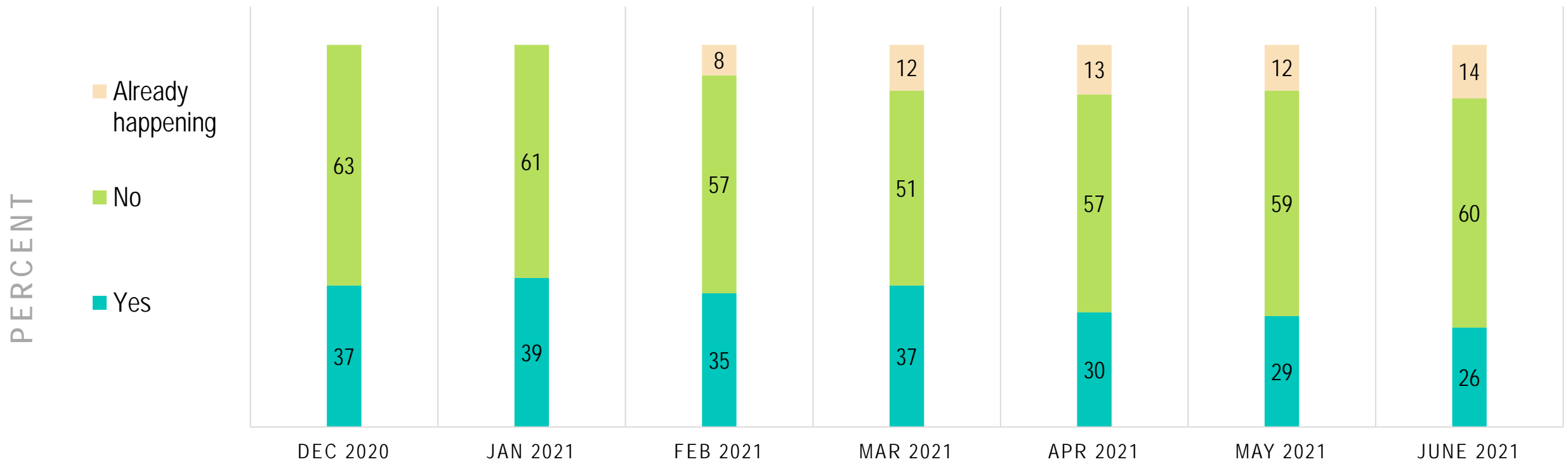
# HOW ELSE MIGHT YOUR OFFICE BE INVOLVED WITH COVID-19 IMMUNIZATION EFFORTS?

*Check all that apply.*

■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021

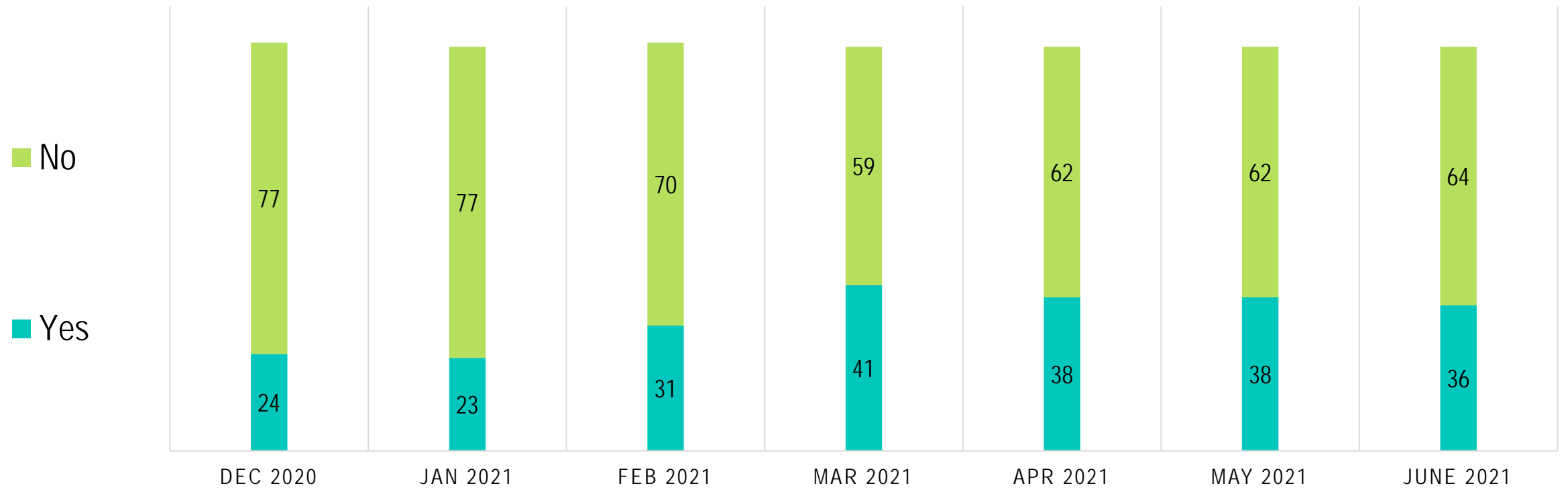


# WOULD YOU LIKE TO SEE OPTOMETRISTS OFFER COVID-19 VACCINES IN YOUR STATE?





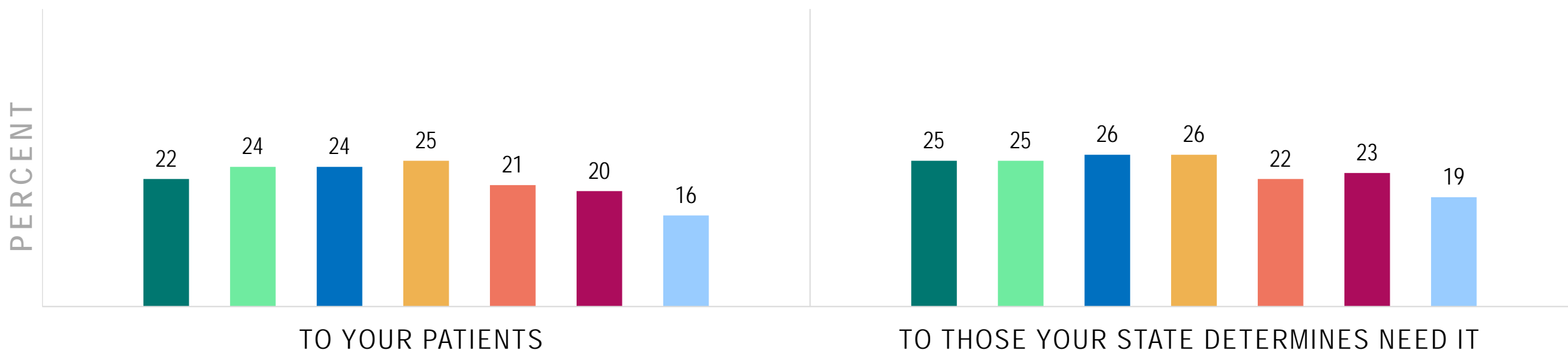
# ARE YOU AWARE OF INITIATIVES IN YOUR STATE ADVOCATING FOR THIS?



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

*Check all that apply.*

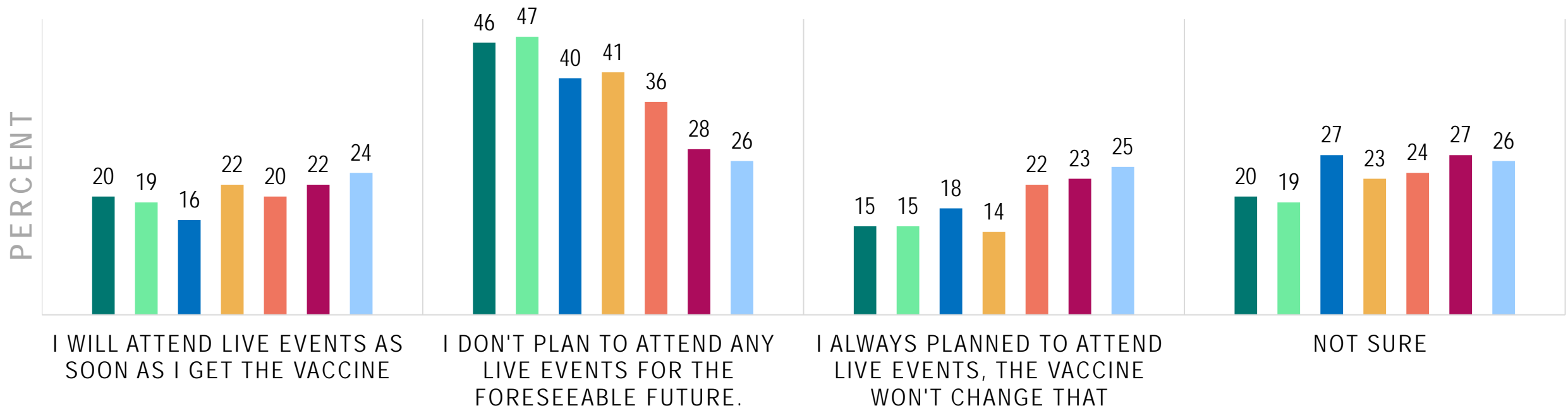
■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



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

*Check all that apply.*

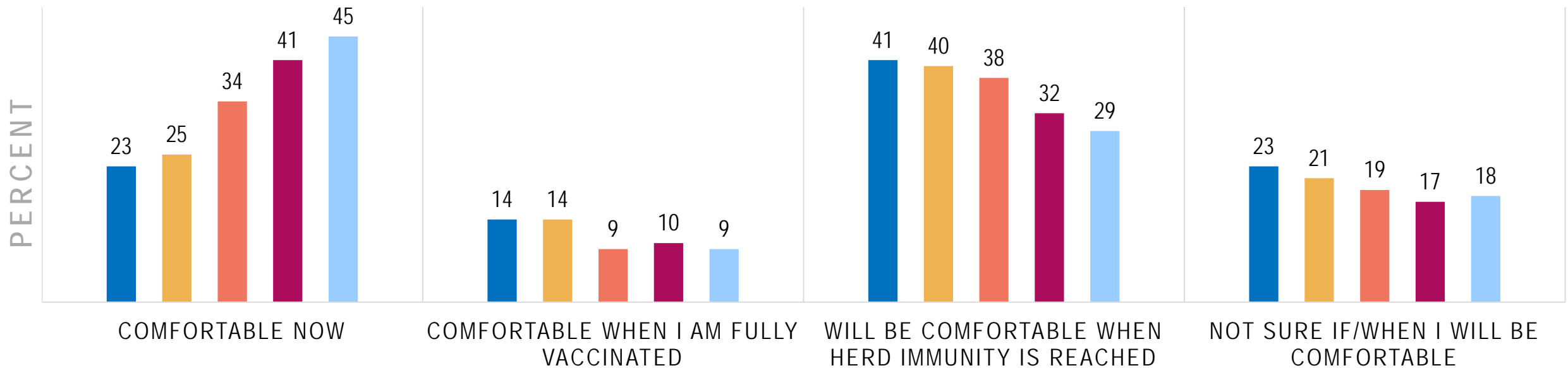
■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



# HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING?

## ATTENDING TRADE SHOWS

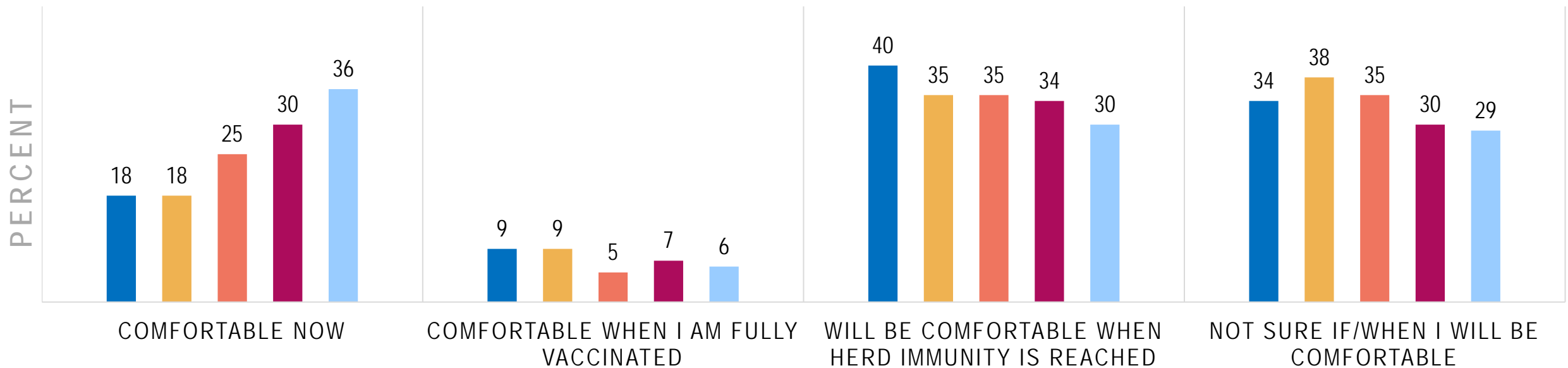
■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



# HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING?

## RELAXING SANITATION AND CLEANING MEASURES

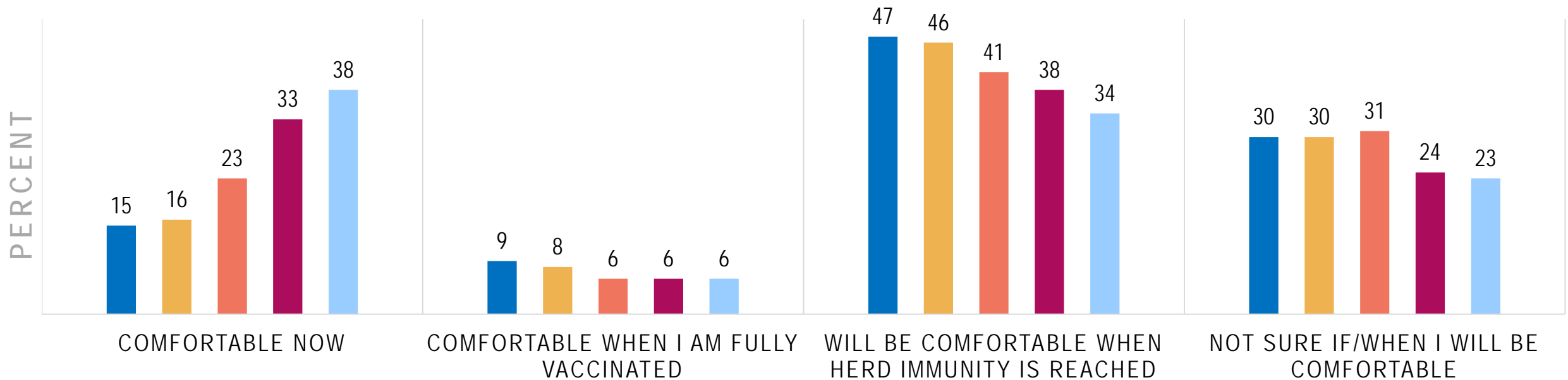
■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



# 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

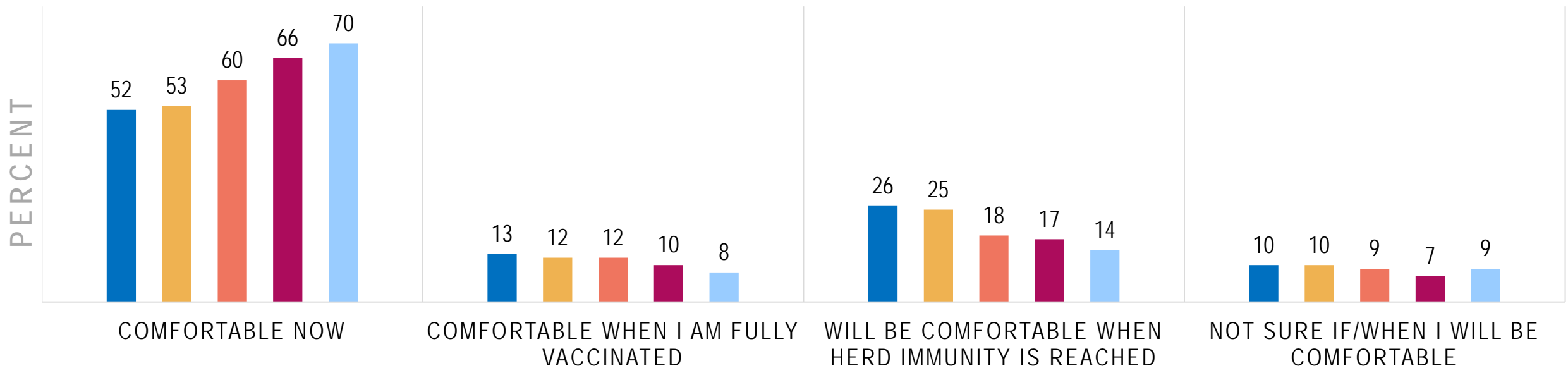
■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



# 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 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021



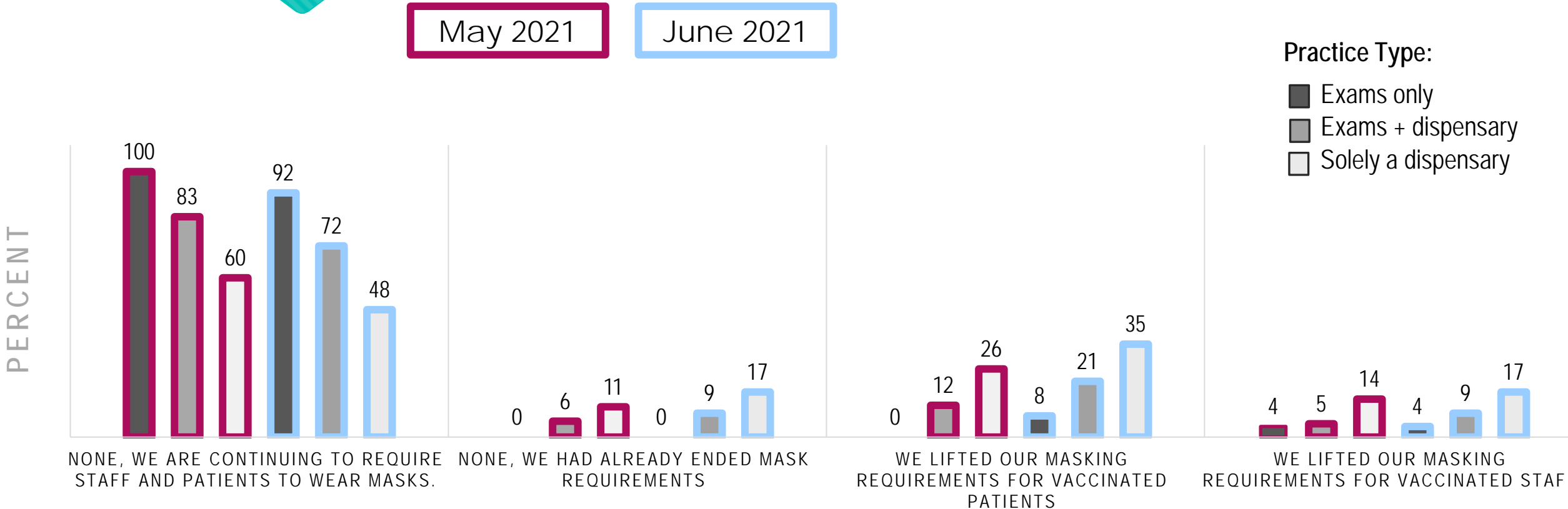


# CDC GUIDLINES



# WITH THE CHANGES IN THE CDC'S GUIDANCE IN MASK WEAR (WHICH DOES NOT APPLY TO HEALTHCARE SETTINGS), WHAT CHANGES HAVE YOU MADE?

Check all that apply.



# HOW ARE YOU COMMUNICATING THE POLICY TO PATIENTS?

*Check all that apply.*

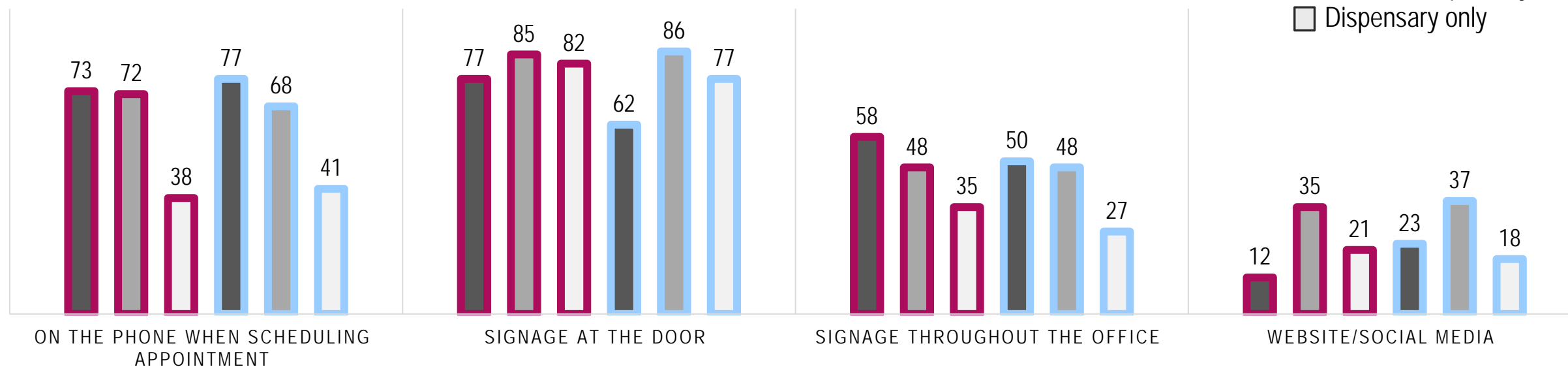
May 2021

June 2021

Practice Type:

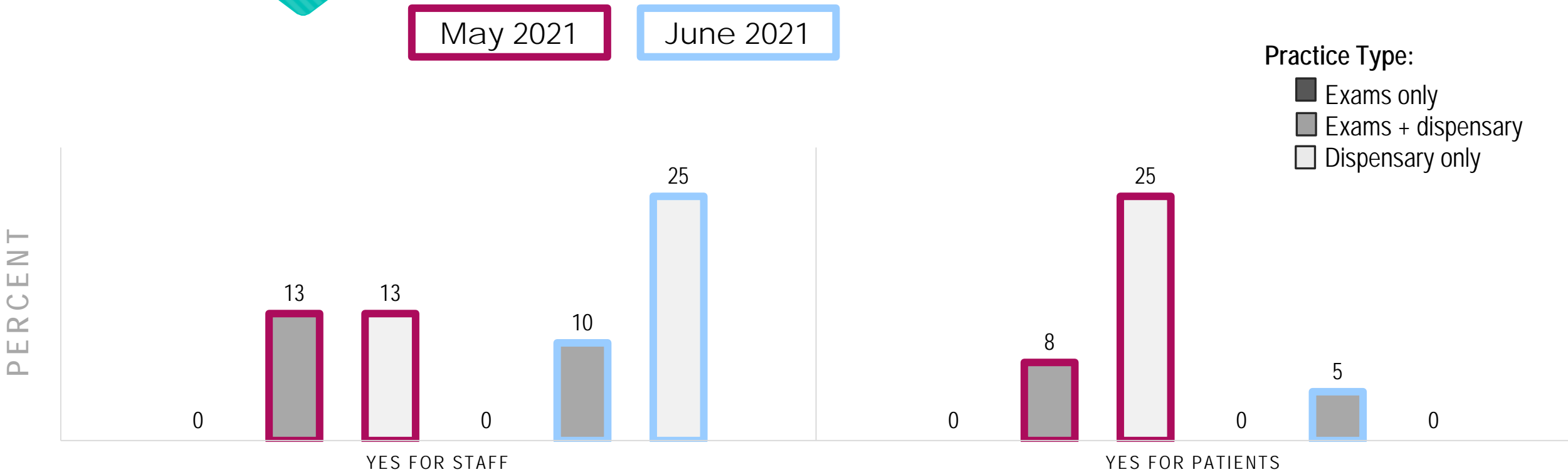
- Exams only
- Exams + dispensary
- Dispensary only

PERCENT



IF ALLOWING UNMASKED:

# DO YOU REQUIRE PROOF OF VACCINATION TO ALLOW INDIVIDUALS TO ENTER YOUR LOCATION UNMASKED?



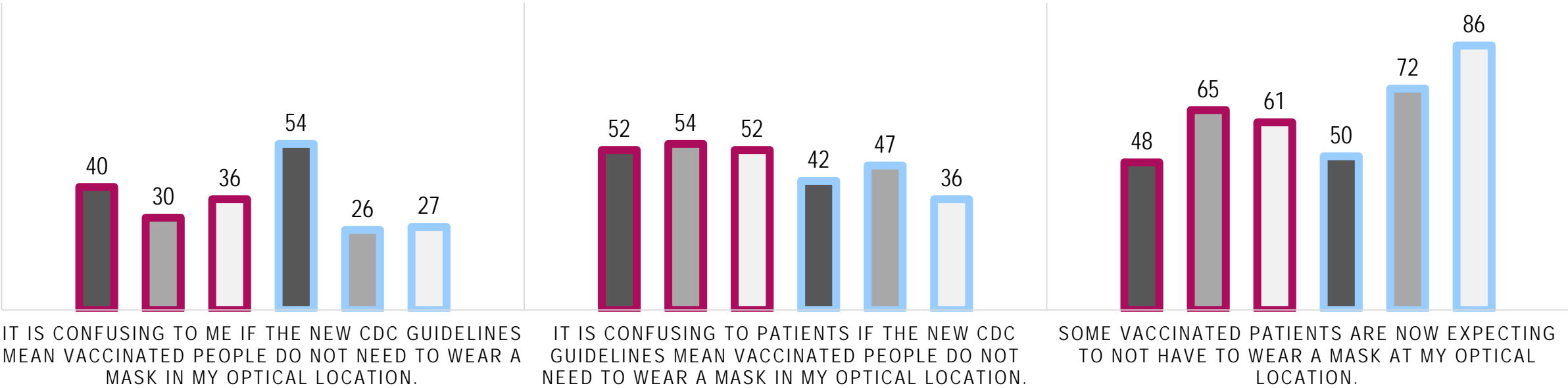
# WHICH OF THESE STATEMENTS DO YOU AGREE WITH?

*Check all that apply.*

May 2021      June 2021

Practice Type:  
■ Exams only  
■ Exams + dispensary  
□ Dispensary only

PERCENT



IF AGREED THAT SOME VACCINATED PATIENTS ARE NOW EXPECTING TO NOT HAVE TO WEAR A MASK AT THEIR OPTICAL LOCATION:

# HAVE YOU ENCOUNTERED ANY OF THE FOLLOWING ISSUES WITH VACCINATED PATIENTS EXPECTING NOT TO WEAR A MASK AT YOUR OPTICAL LOCATION WHEN YOU HAVE ASKED THEM TO WEAR ONE?

Check all that apply.

