

CORONAVIRUS ECP STUDY

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

R E S E A R C H

Wave 25

July 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.

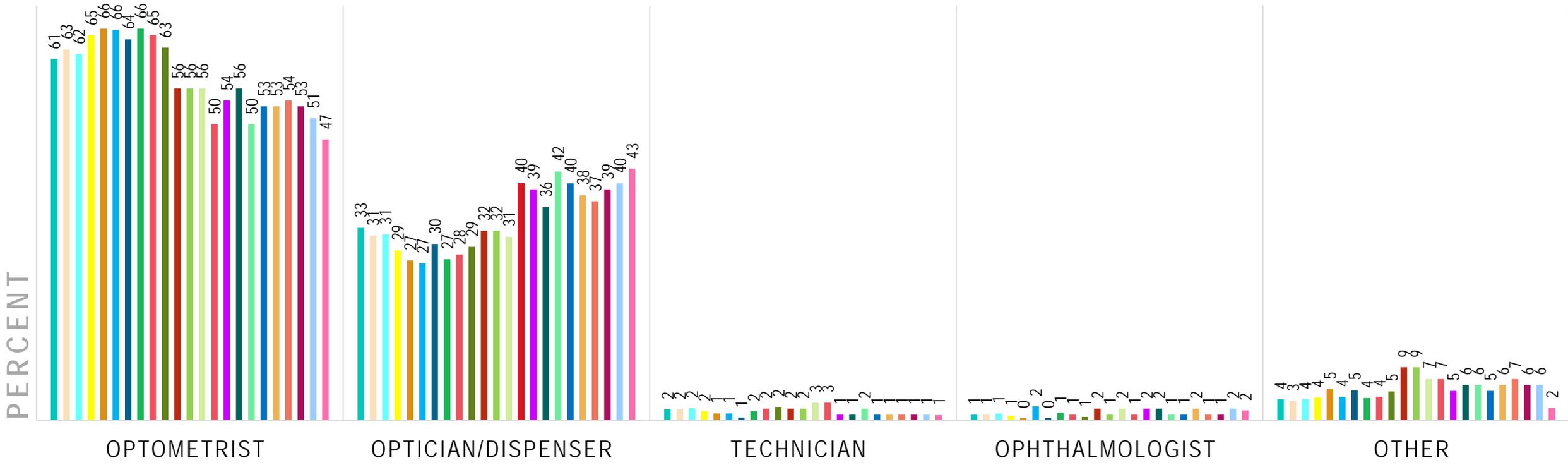
Questions varied slightly in each wave.

Comparisons are shown wherever possible.

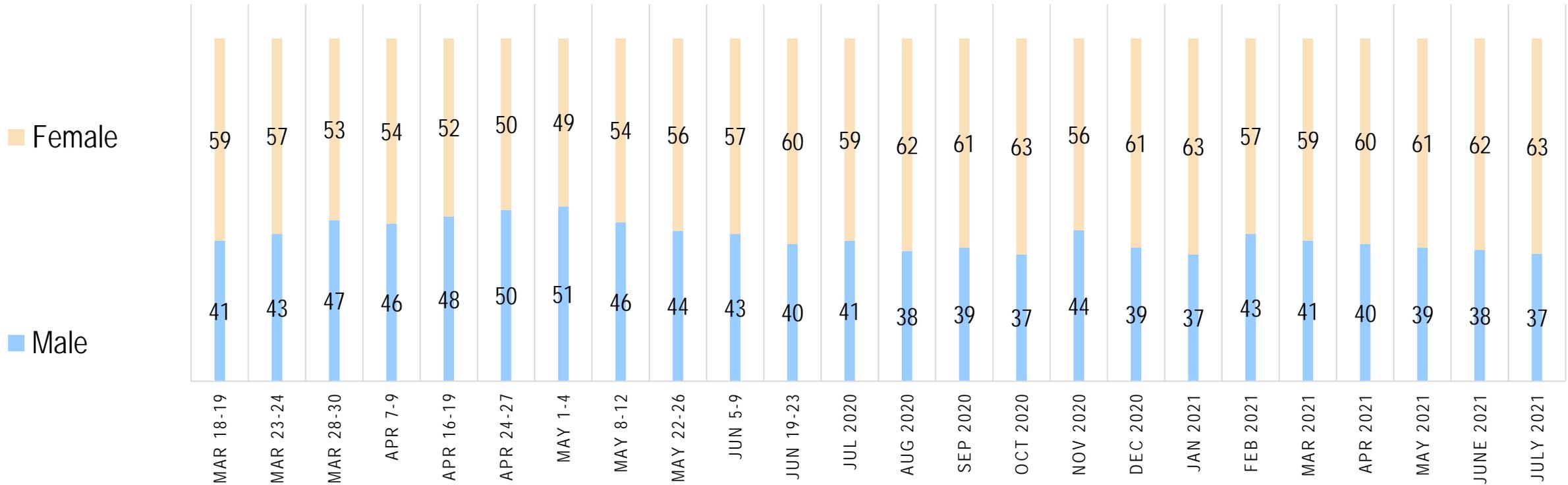
- Wave 13 ran from Jul 10-15, 2020. 497 completes.
- Wave 14 ran from Aug 21 – 27, 2020. 576 completes.
- Wave 15 ran from Sep 18-22, 2020. 638 completes.
- Wave 16 ran from Oct 16-20, 2020. 771 completes.
- Wave 17 ran from Nov 24-30, 2020. 619 completes.
- Wave 18 ran from Dec 21-31, 2020. 500 completes.
- 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.
- Wave 25 ran from July 26-28, 2021. 529 completes.

RESPONDENT DEMOGRAPHICS

RESPONDENT PROFESSION

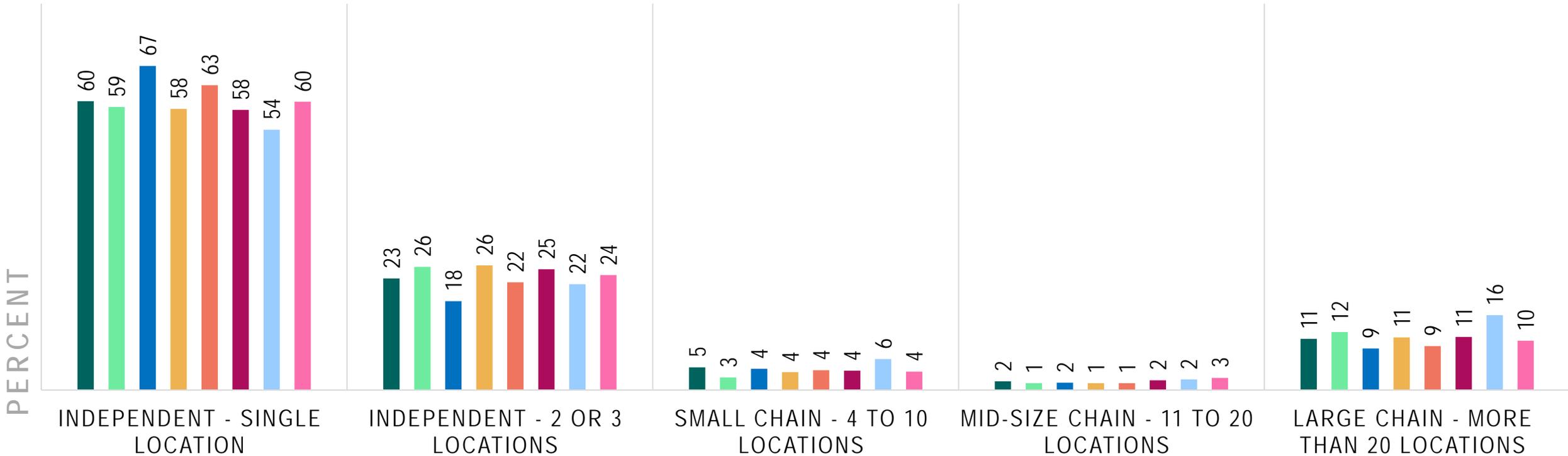


GENDER



LOCATION TYPE

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

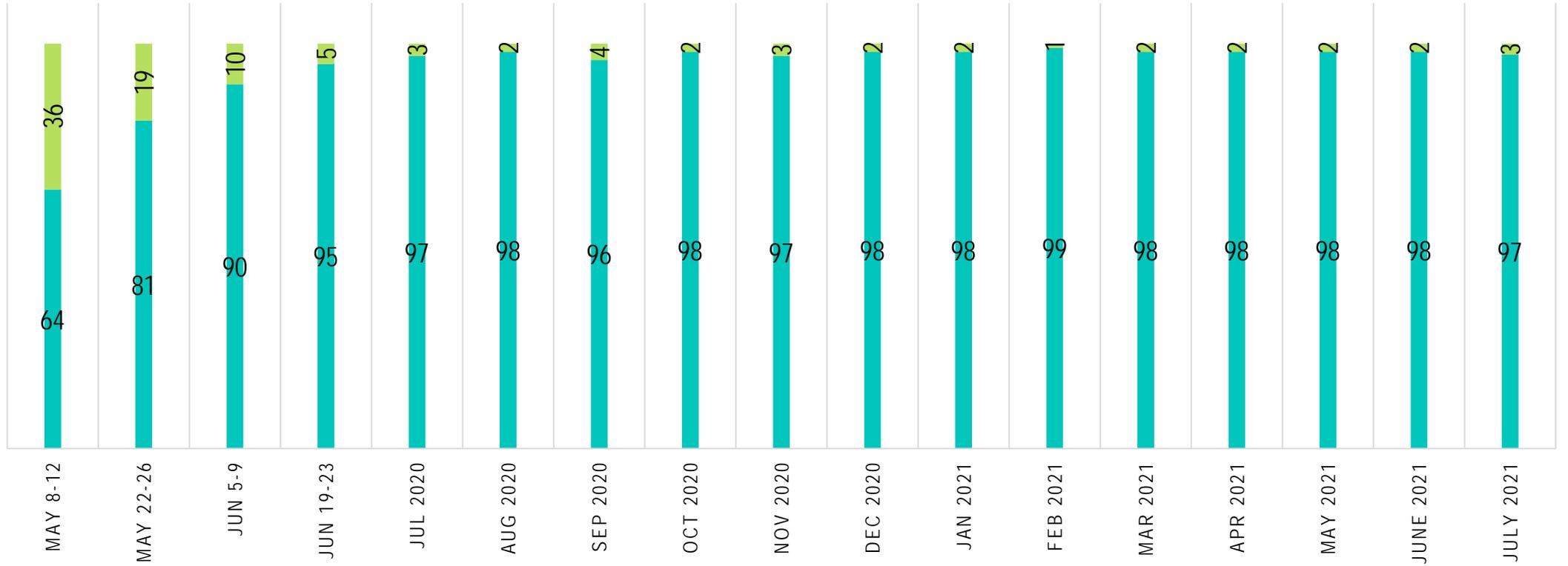


PRACTICE STATUS

LOCATION OPEN?

PERCENT

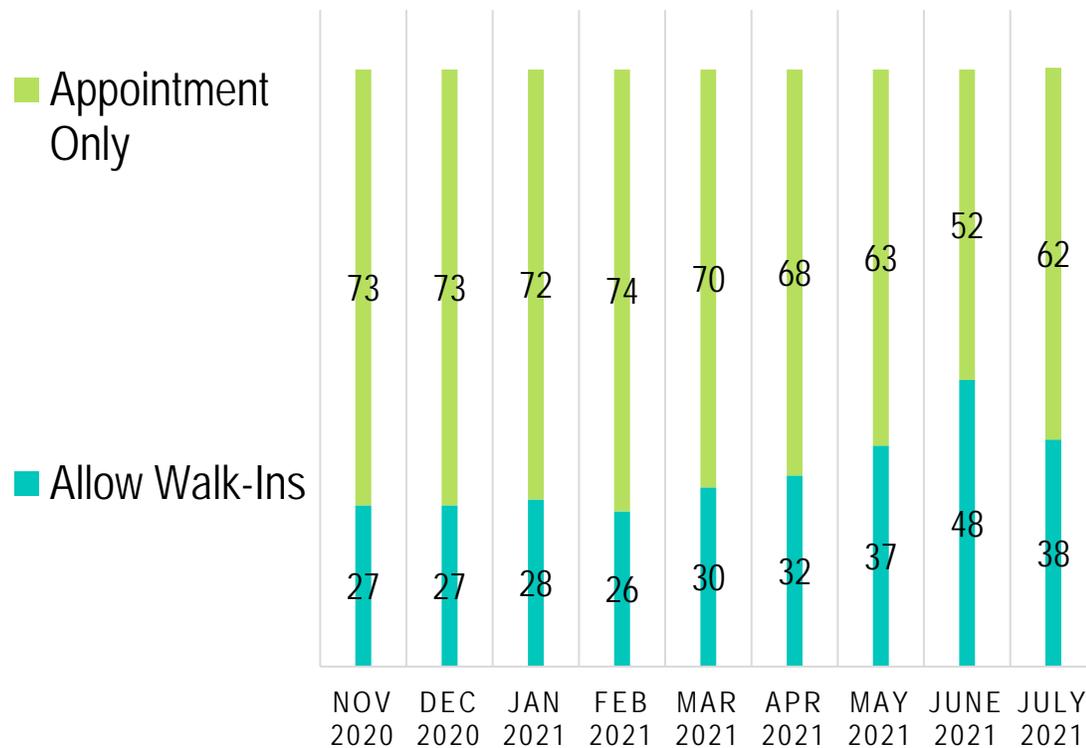
■ No
■ Yes



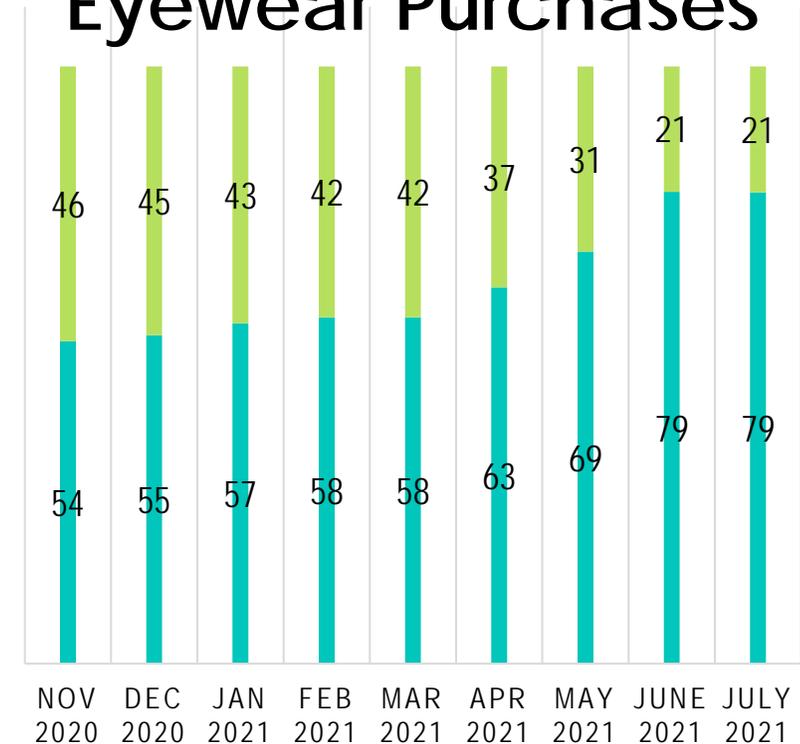
PRACTICES

WALK-INS VS. APPOINTMENTS

For Eye Exams

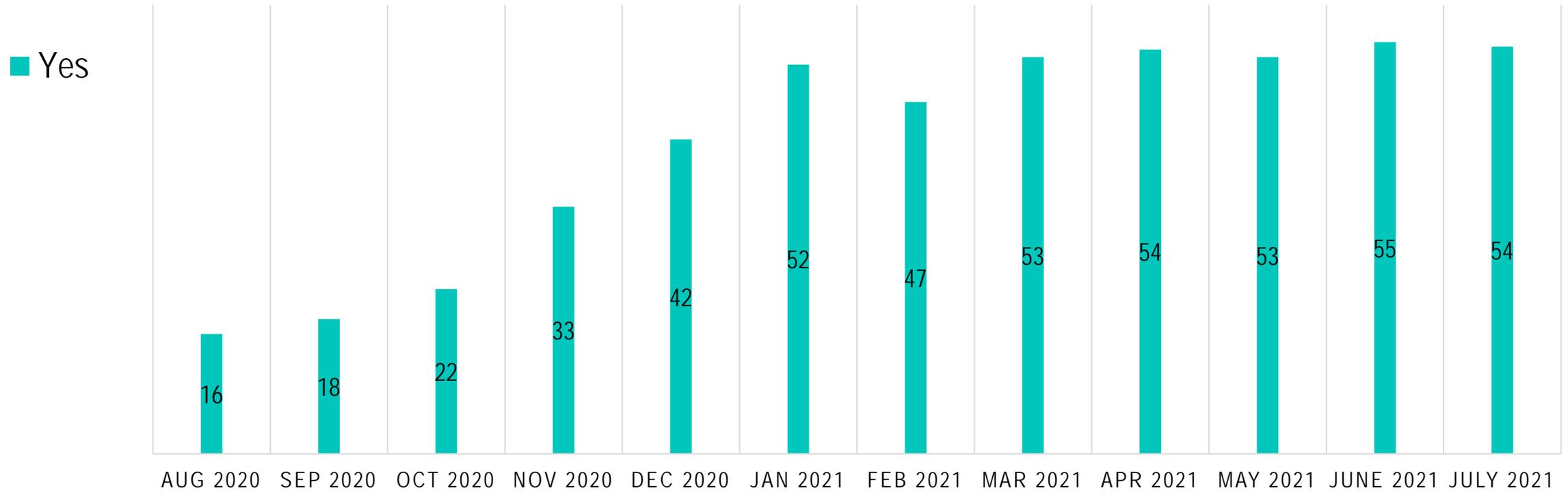


For Dispensing/ Eyewear Purchases



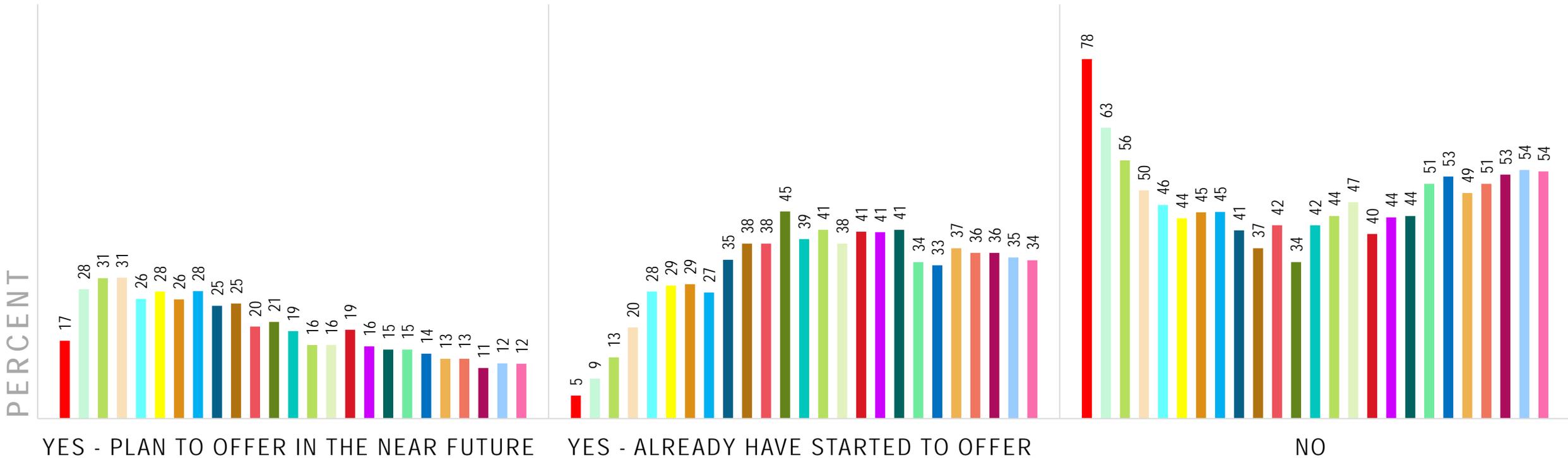
STAFF

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



TELEHEALTH

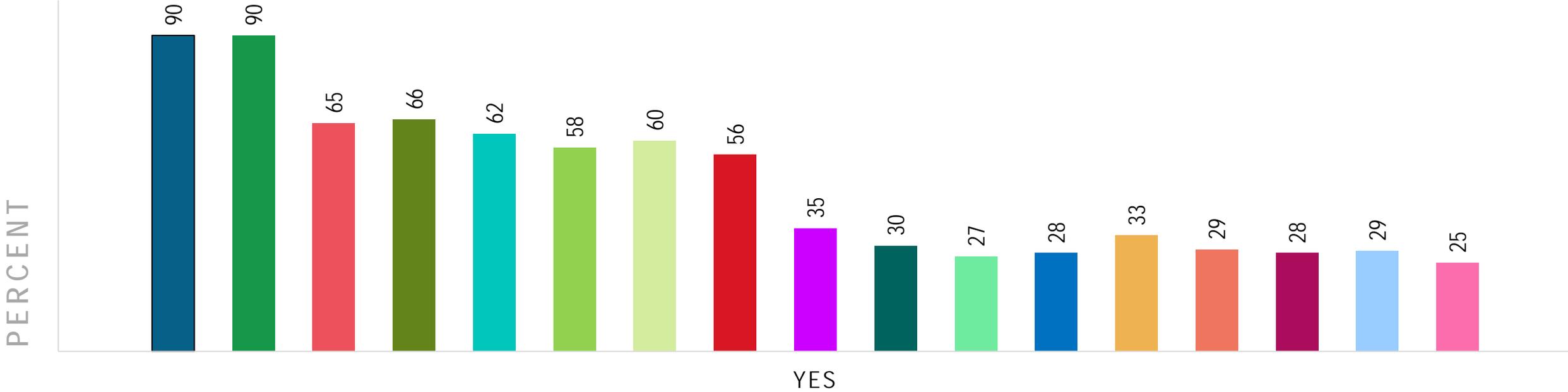
HAS THE CORONAVIRUS INFLUENCED YOUR CONSIDERATION OF OFFERING TELEHEALTH SERVICES/OPTIONS?



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

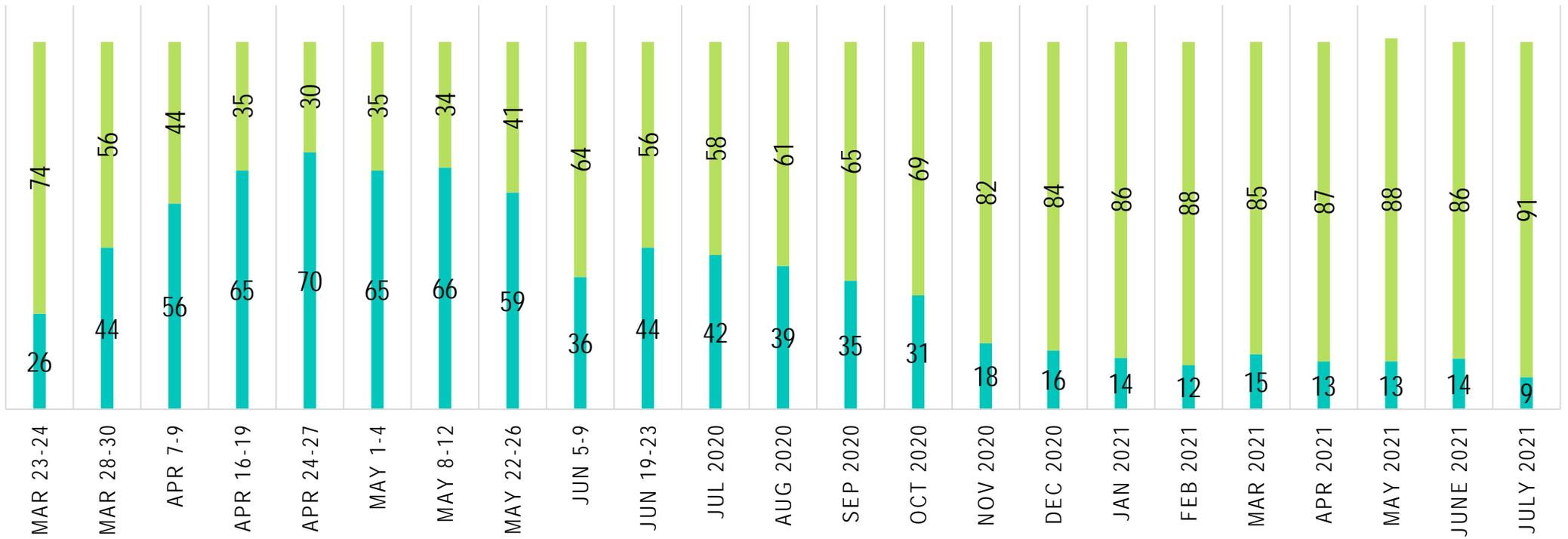


If currently offering telehealth:

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

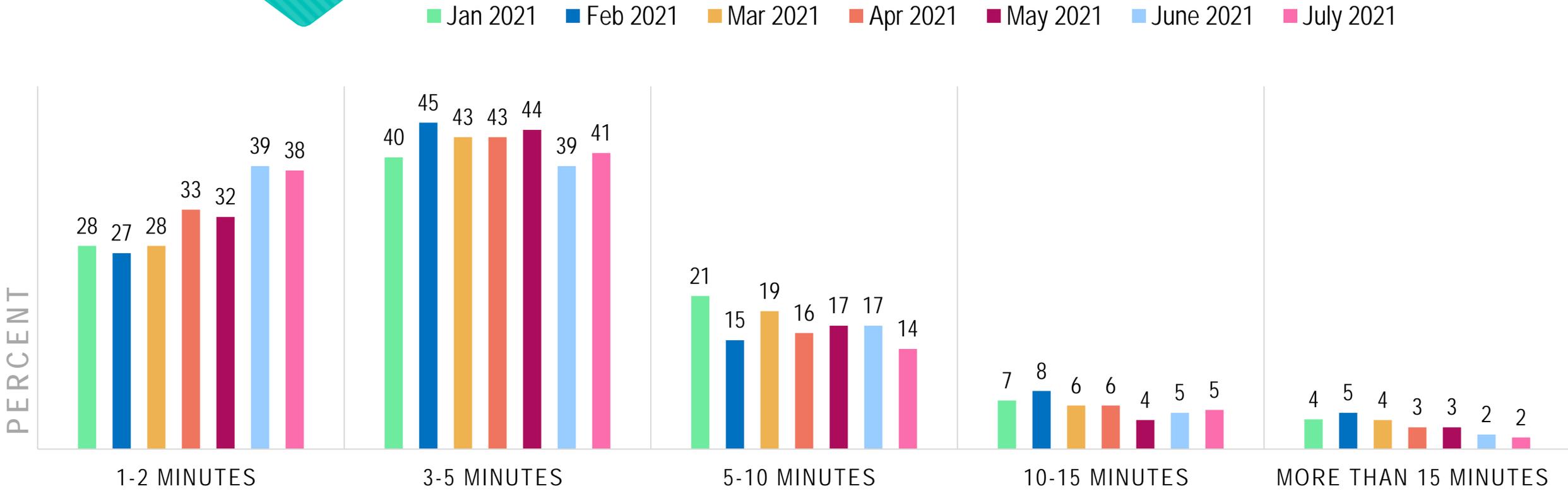
PERCENT

■ No
■ Yes



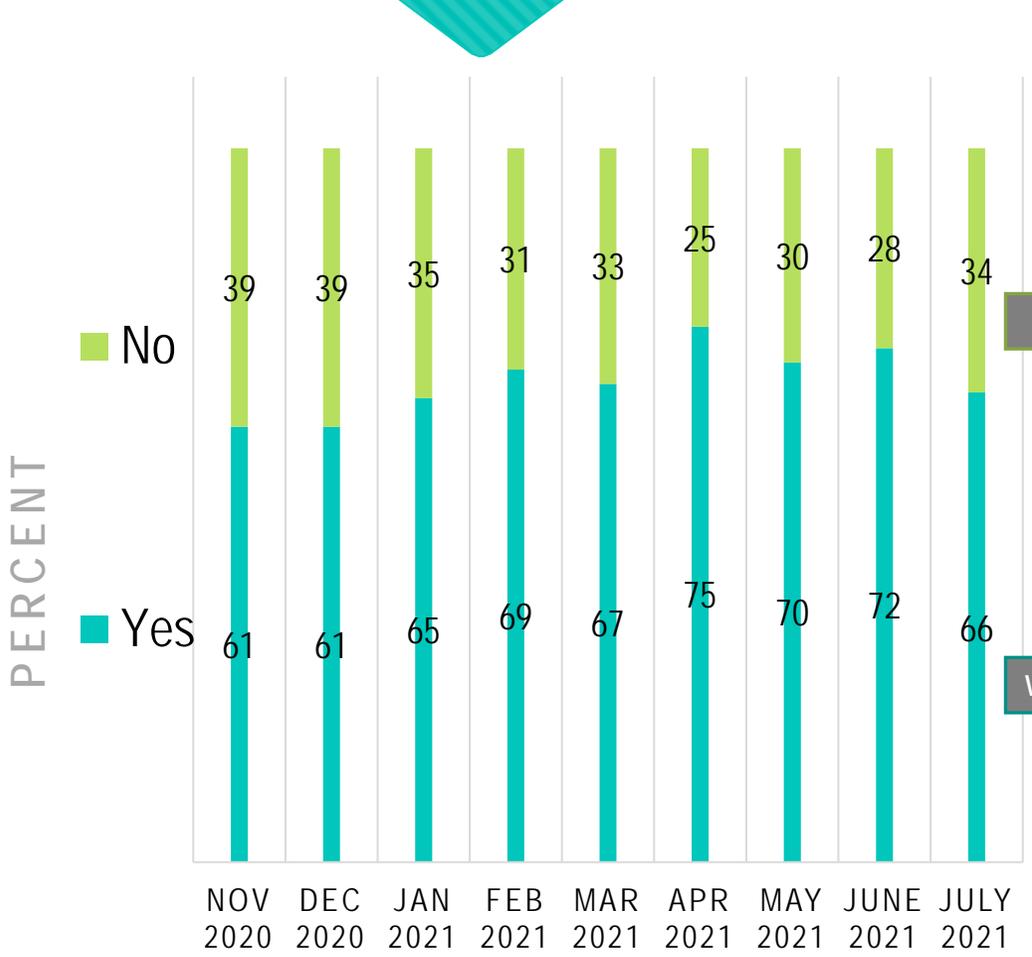
CLEANING & SANITATION

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



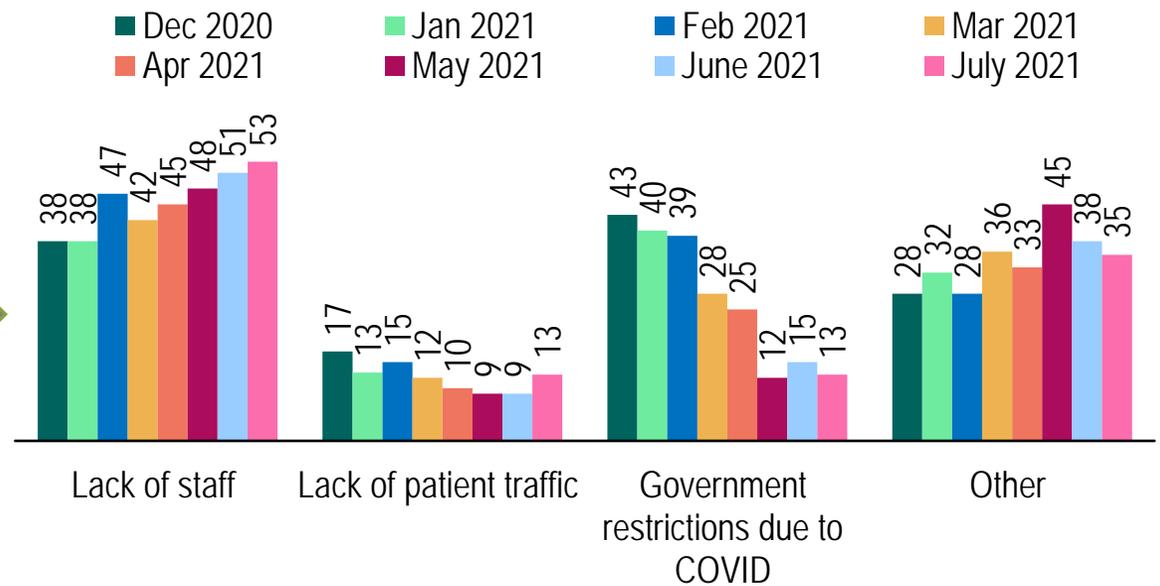
PATIENT VOLUME

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



WHY NO?

WHAT % MORE?



- Average: 31% more
- Average: 32% more
- Average: 30% more
- Average: 29% more
- Average: 26% more
- Average: 30% more
- Average: 26% more
- Average: 26% more

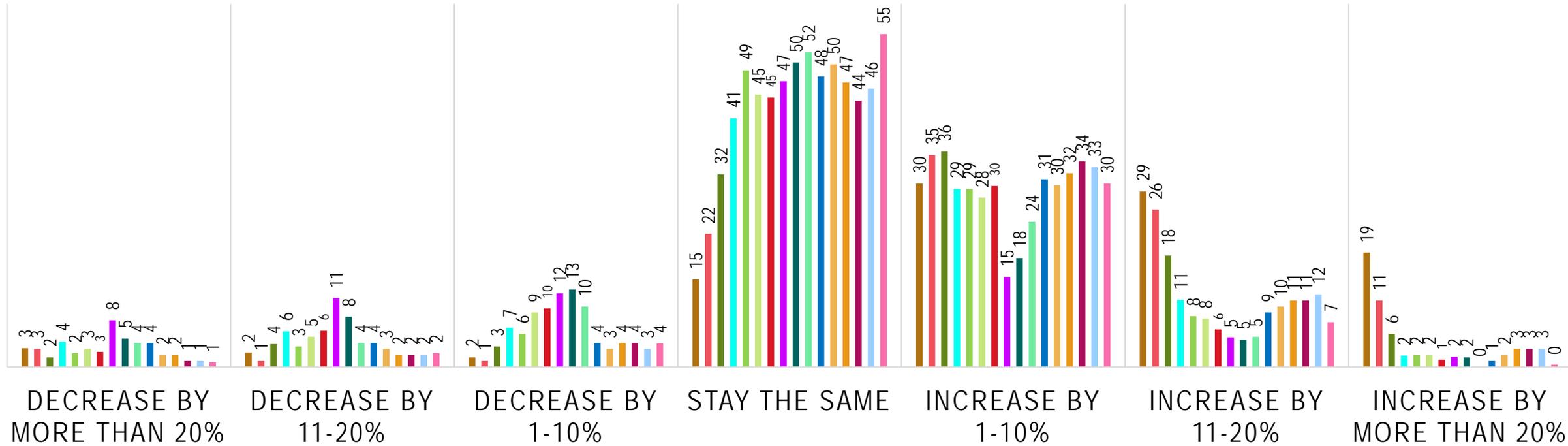
YEAR OVER YEAR COMPARISONS

| | 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 | JULY 2021 VS JULY 2020 | JULY 2021 VS JULY 2019 |
|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| PROFITABILITY PER PATIENT | +18% | -5% | +39% | -2% | +29% | -2% | +19% | -1% | +30% | -1% |
| # PATIENTS PER DAY | +22% | -8% | +48% | -6% | +34% | -4% | +22% | -3% | +16% | -1% |
| REVENUE | +23% | -4% | +48% | -3% | +34% | -1% | +21% | -2% | +15% | = |
| OPTICAL SALES | +24% | -3% | +48% | -2% | +35% | = | +21% | -1% | +15% | +1% |
| CAPTURE RATE | +14% | = | +36% | = | +23% | +1% | +13% | = | +8% | +1% |

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



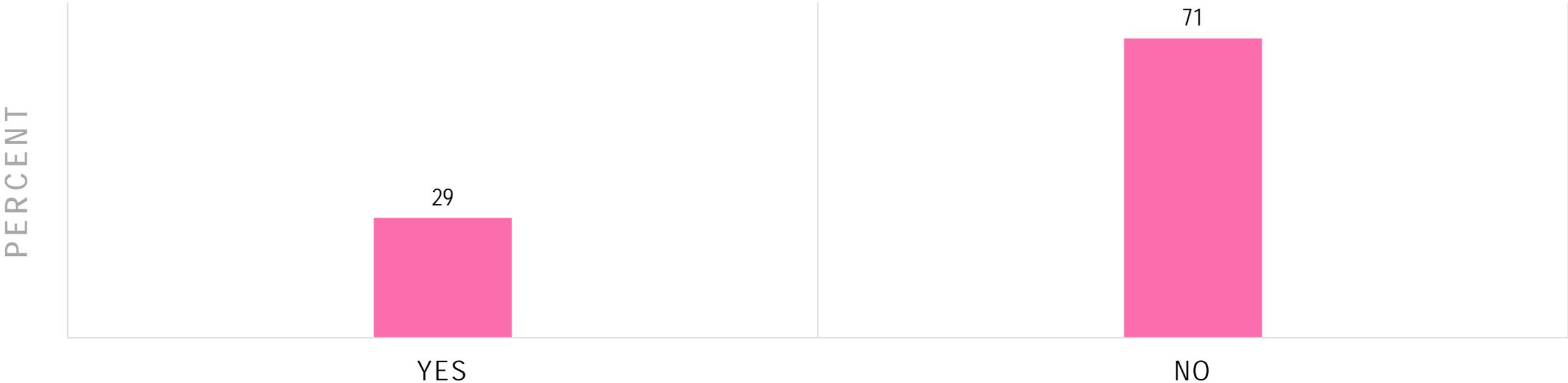
PERCENT



TRADE SHOWS

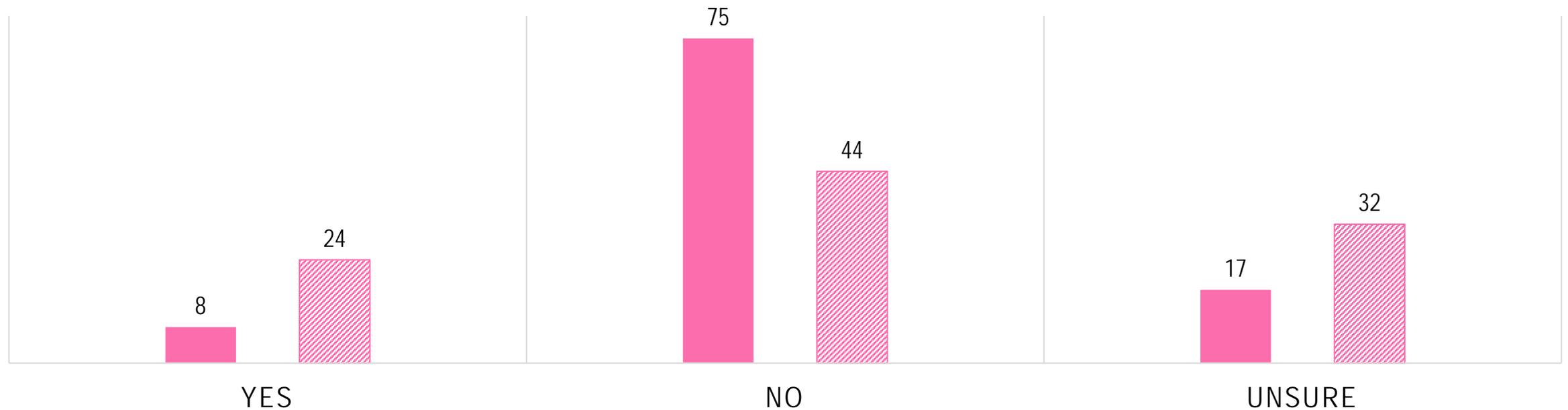
DID YOU TYPICALLY ATTEND VISION EXPO WEST PRE-COVID?

July 2021



ARE YOU PLANNING ON ATTENDING VISION EXPO WEST THIS YEAR?

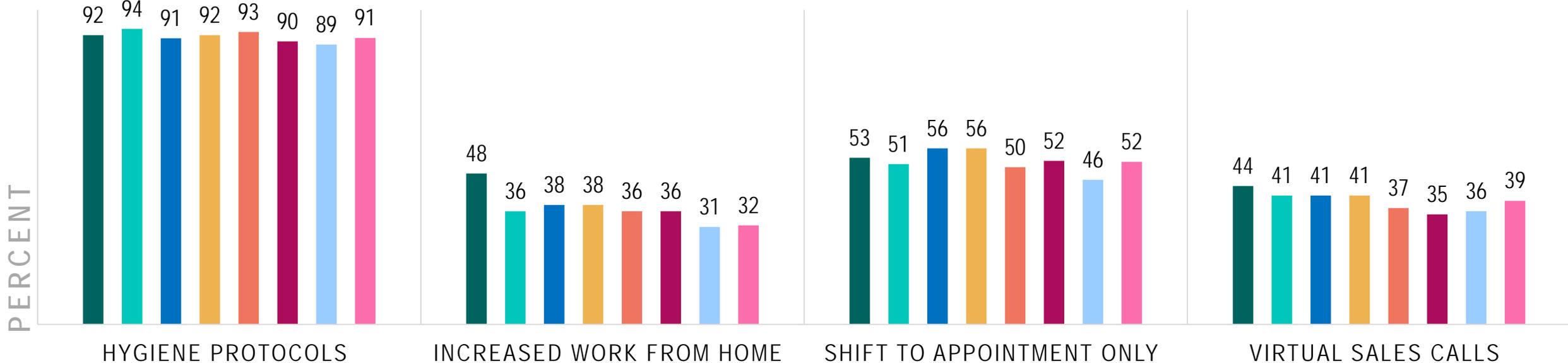
■ All Respondents ■ Typically Attend Pre-COVID



THE FUTURE

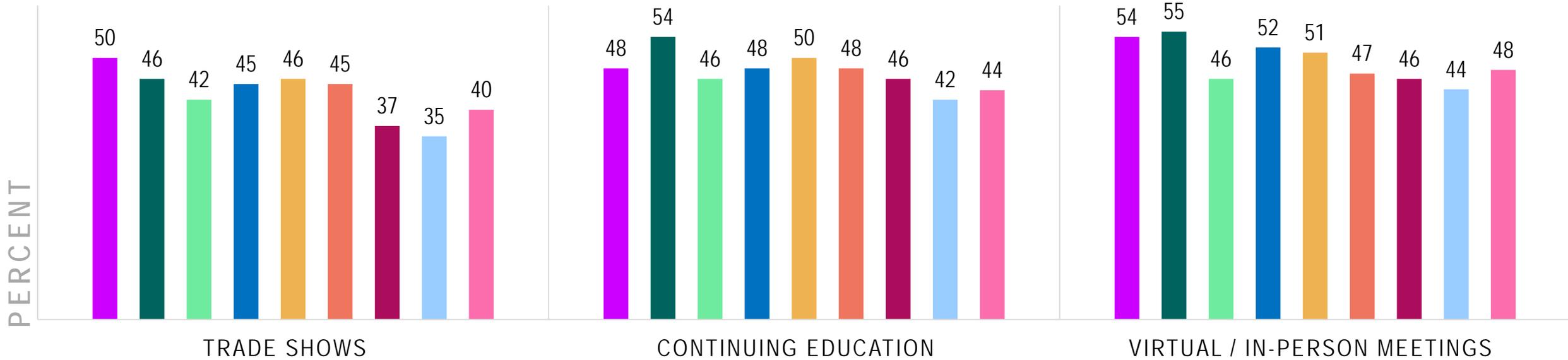
WHAT NEW PRACTICE PROCEDURES DO YOU EXPECT TO CONTINUE POST-COVID?

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

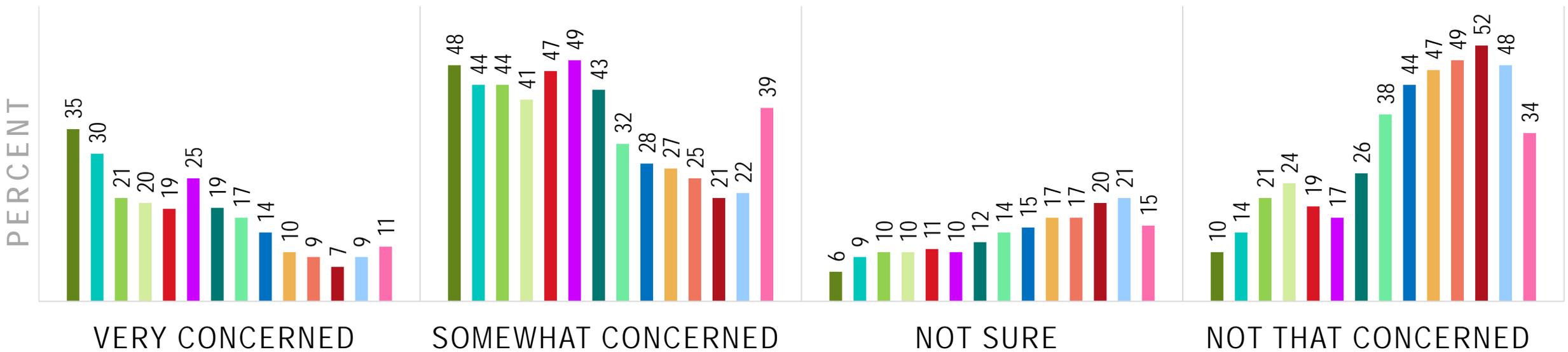


WHAT CHANGES INSTITUTED DUE TO COVID-19 HAVE CHANGED FOREVER?

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



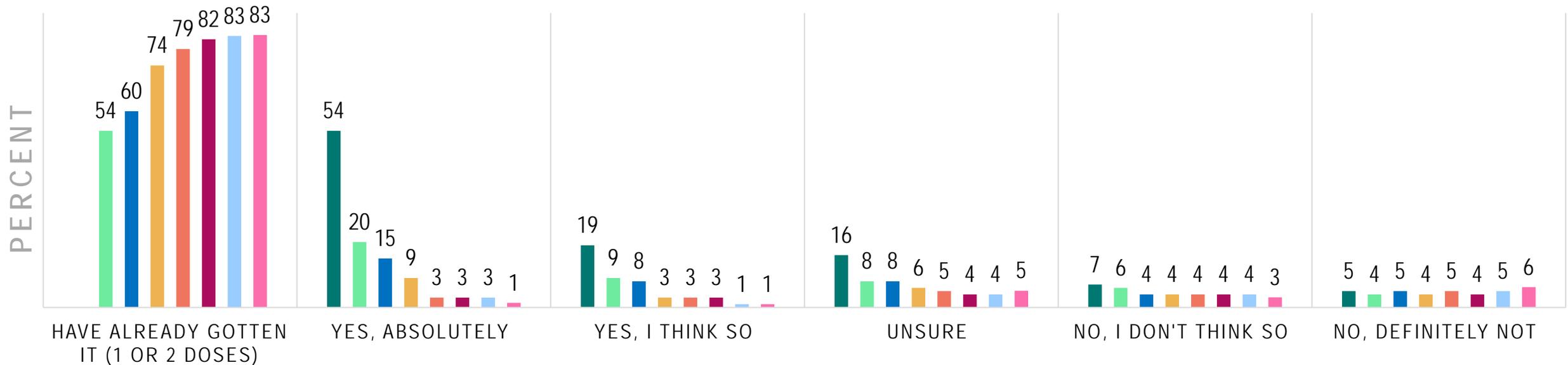
HOW CONCERNED ARE YOU ABOUT THE POSSIBILITY OF HAVING TO CLOSE YOUR BUSINESS (AGAIN) FOR ANOTHER SHUT-DOWN DUE TO COVID-19?



THE VACCINE

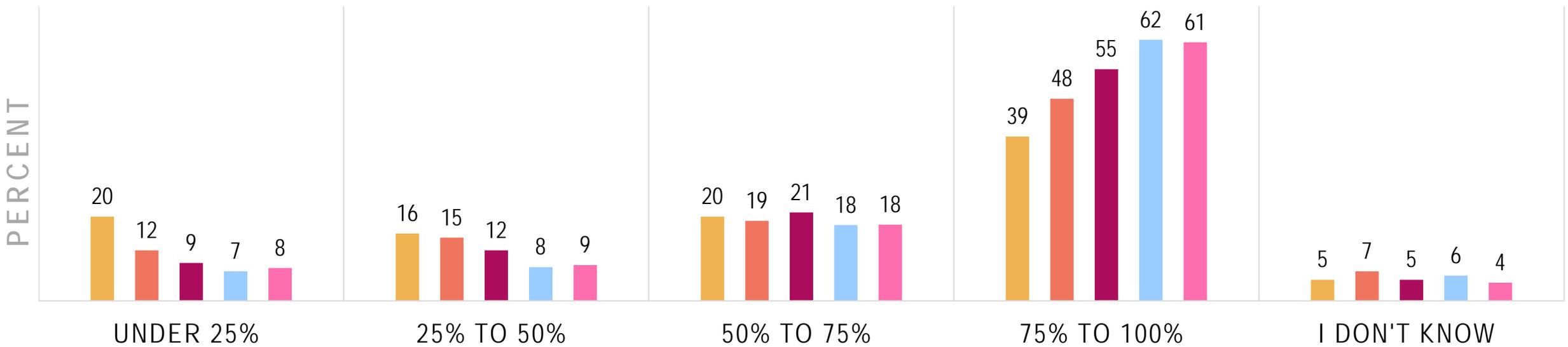
ARE YOU PLANNING TO GET THE COVID-19 VACCINE WHEN IT BECOMES AVAILABLE TO YOU?

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



WHAT PERCENTAGE OF YOUR STAFF HAS BEEN VACCINATED?

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



IF NOT PLANNING TO GET THE COVID-19 VACCINE:

WHY NO?

Check all that apply.

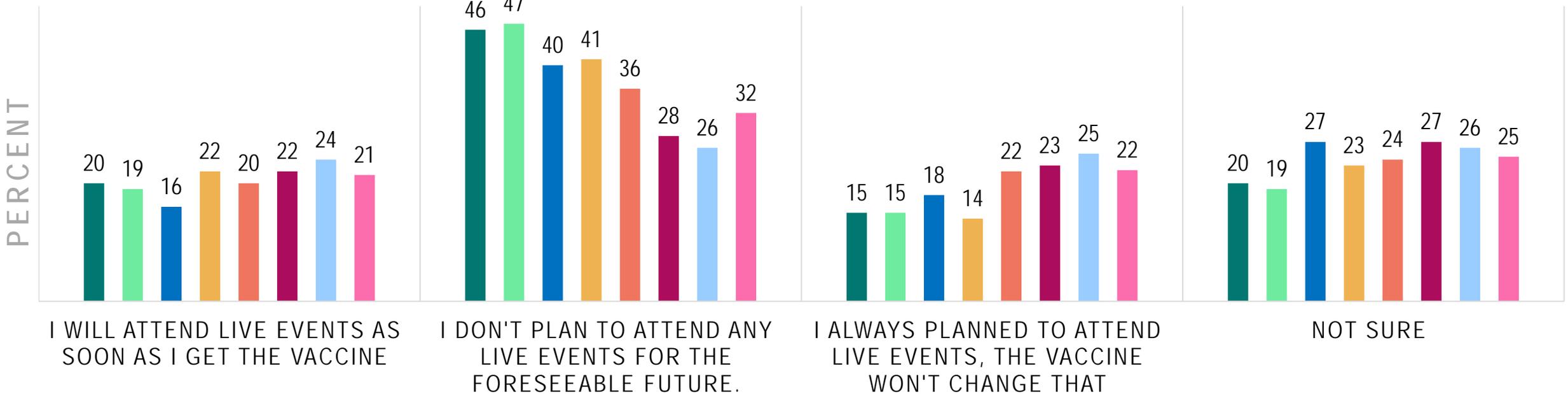
■ Dec 2020 ■ Jan 2021 ■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021 ■ July 2021



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

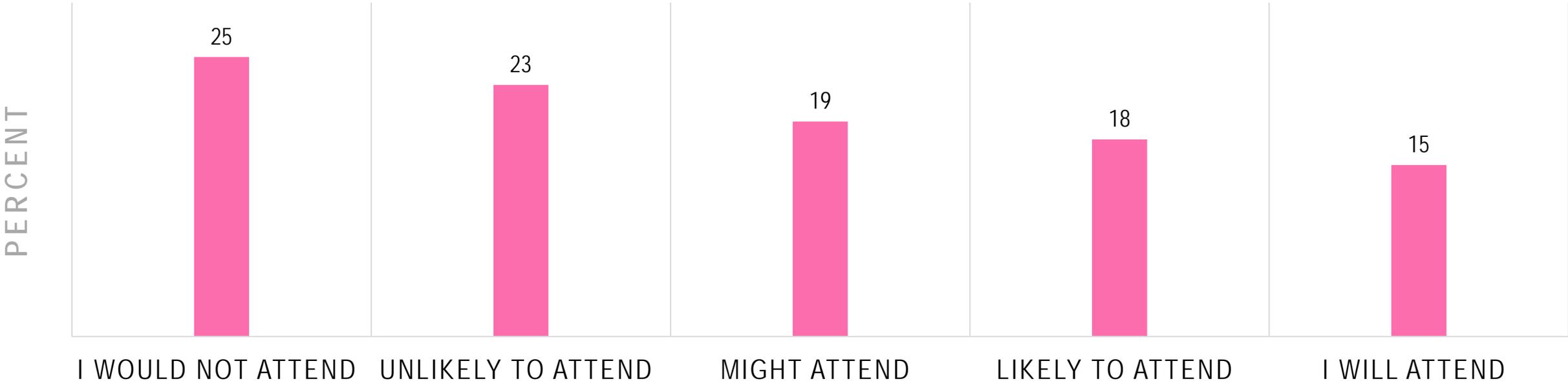
Check all that apply.

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



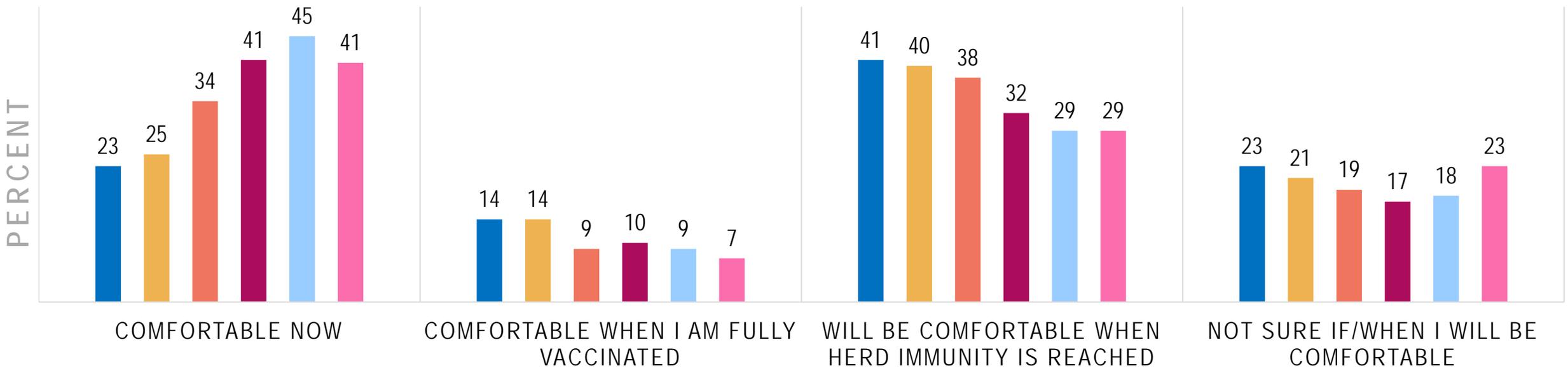
HOW LIKELY WOULD YOU BE TO ATTEND AN IN-PERSON INDUSTRY EVENT IN THE NEXT MONTH?

July 2021



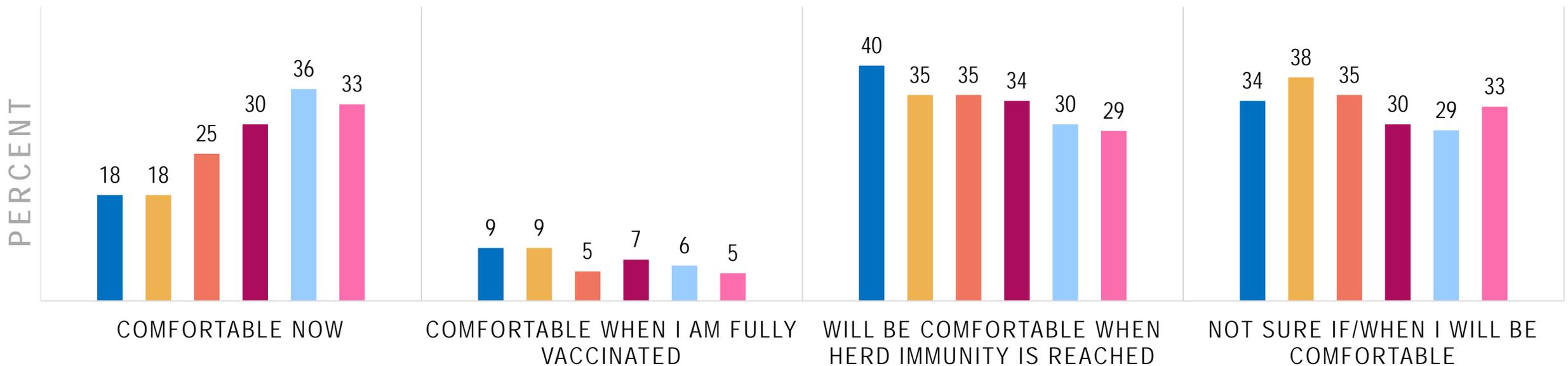
HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? ATTENDING TRADE SHOWS

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



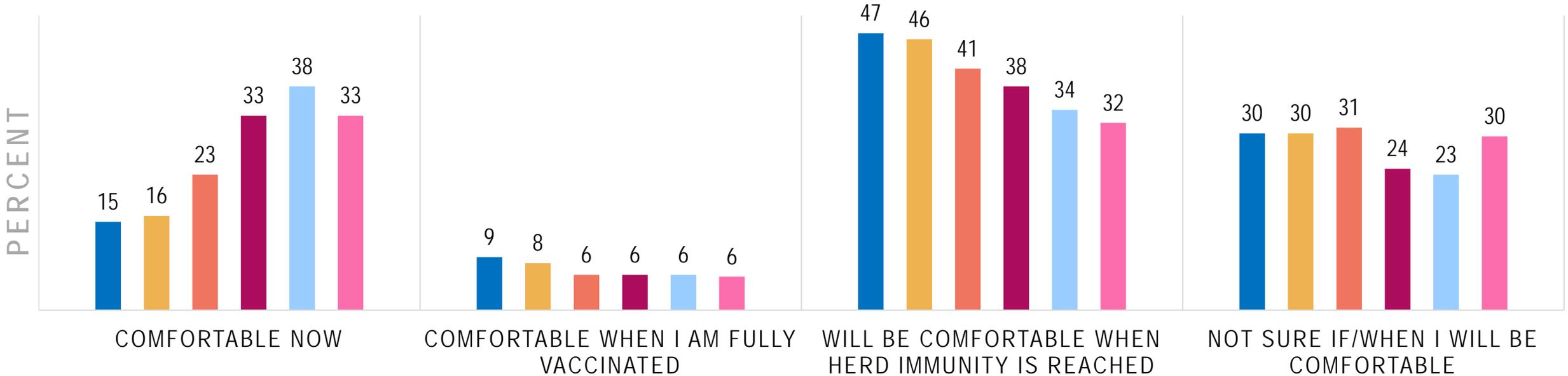
HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? RELAXING SANITATION AND CLEANING MEASURES

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



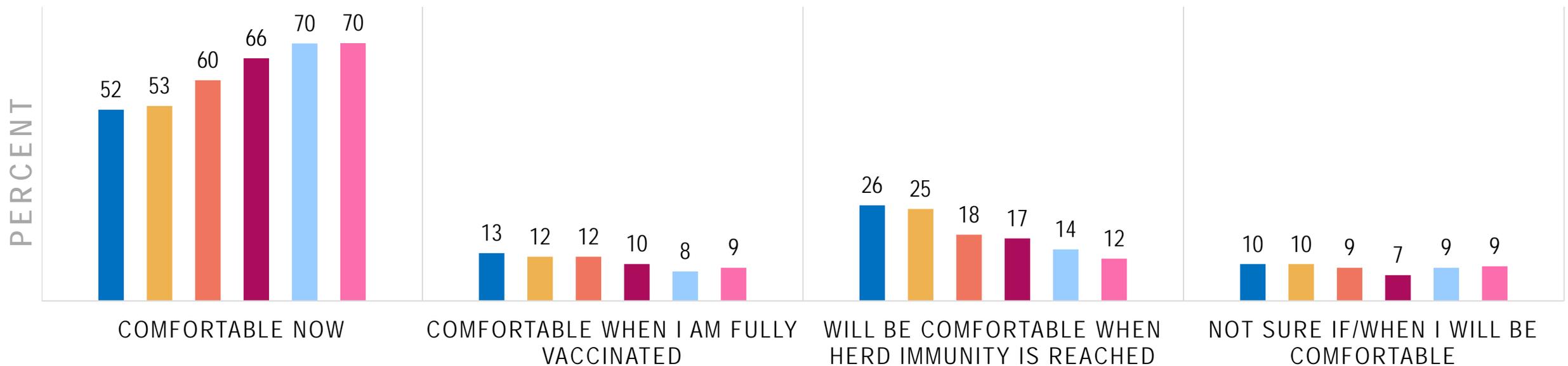
HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? REDUCING PPE USE IN THE OFFICE

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



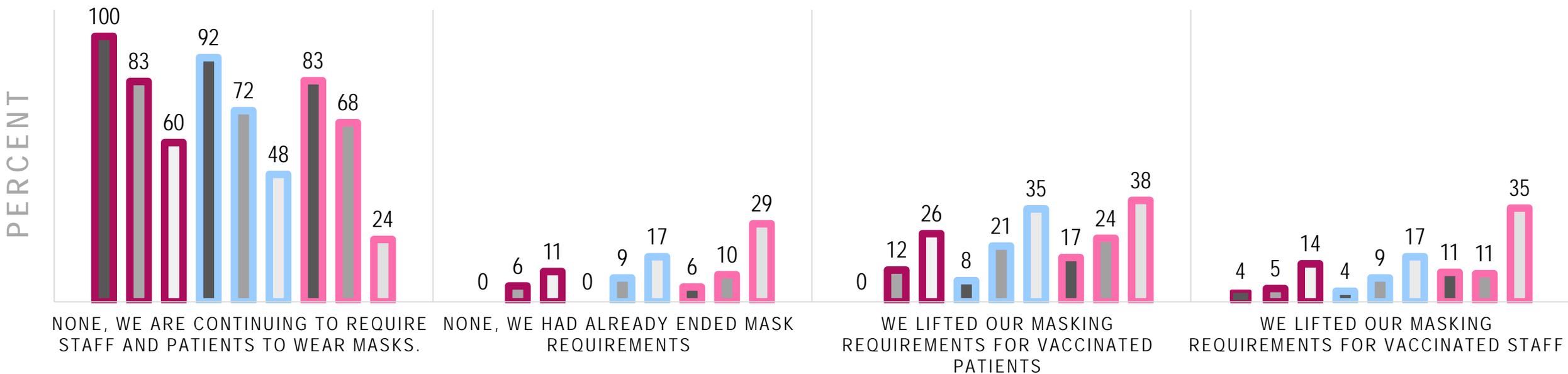
CDC GUIDLINES

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.

May 2021 June 2021 July 2021

Practice Type:
 ■ Exams only
 ■ Exams + dispensary
 ■ Solely a dispensary

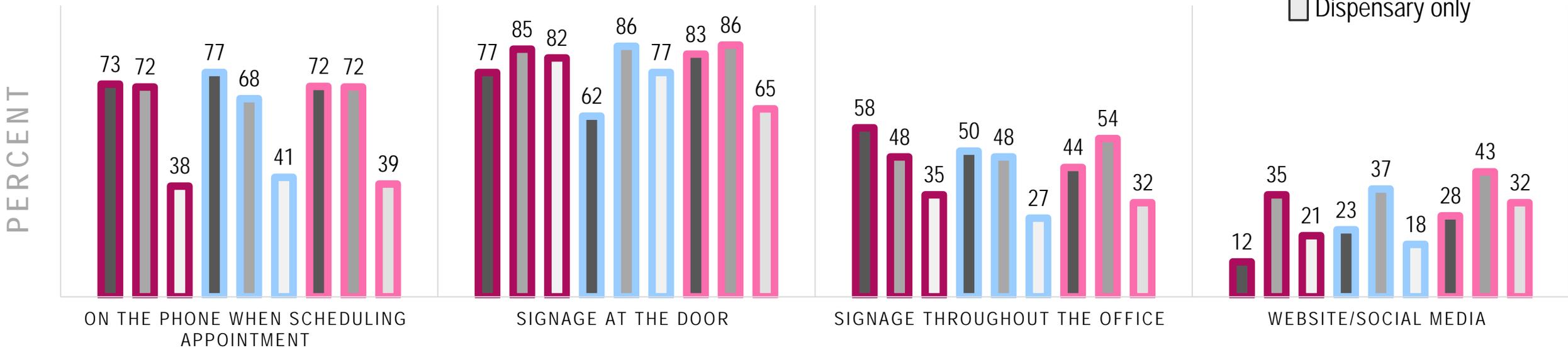


HOW ARE YOU COMMUNICATING THE POLICY TO PATIENTS?

Check all that apply.

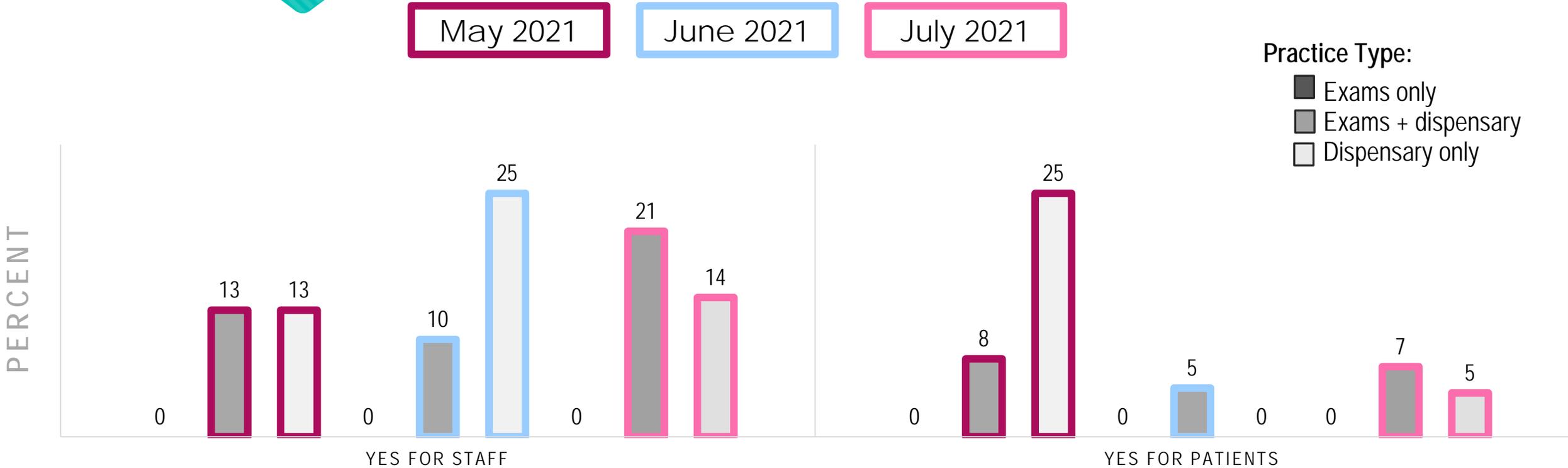
May 2021 June 2021 July 2021

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



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?

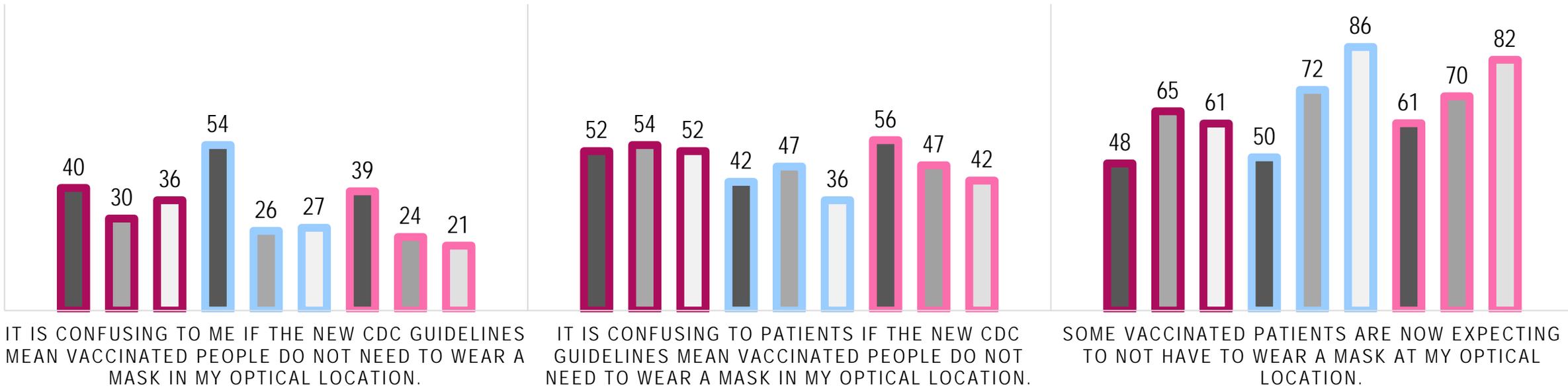
Check all that apply.

May 2021 June 2021 July 2021

Practice Type:

- Exams only
- Exams + dispensary
- Dispensary only

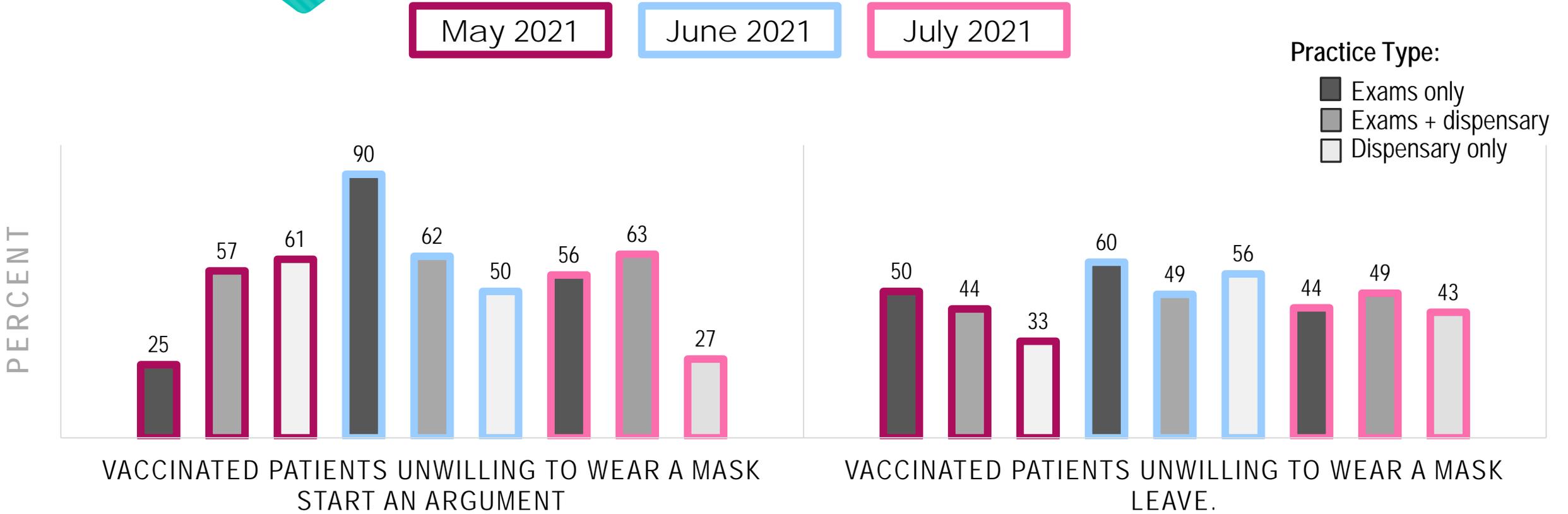
PERCENT



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.



SUPPLY CHAIN

ARE YOU CURRENTLY EXPERIENCING ANY ISSUES WITH PRODUCTS HAVING DELAYS DUE TO SUPPLY CHAIN ISSUES BECAUSE OF COVID-19 RESTRICTIONS?

■ July 2021

PERCENT

