

CORONAVIRUS ECP STUDY

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

R E S E A R C H

Wave 26

August 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.
- Wave 13 ran from Jul 10-15, 2020. 497 completes.

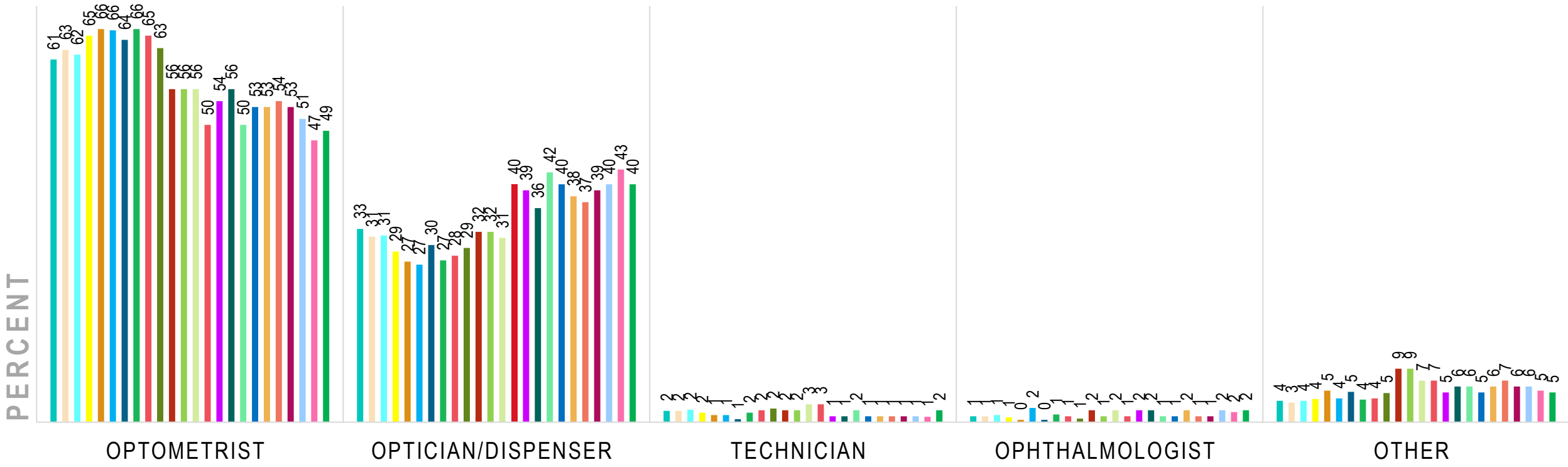
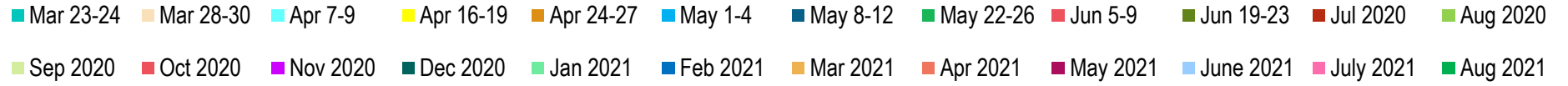
Questions varied slightly in each wave.

Comparisons are shown wherever possible.

- 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.
- Wave 26 ran from August 13-16, 2021. 458 completes.

RESPONDENT DEMOGRAPHICS

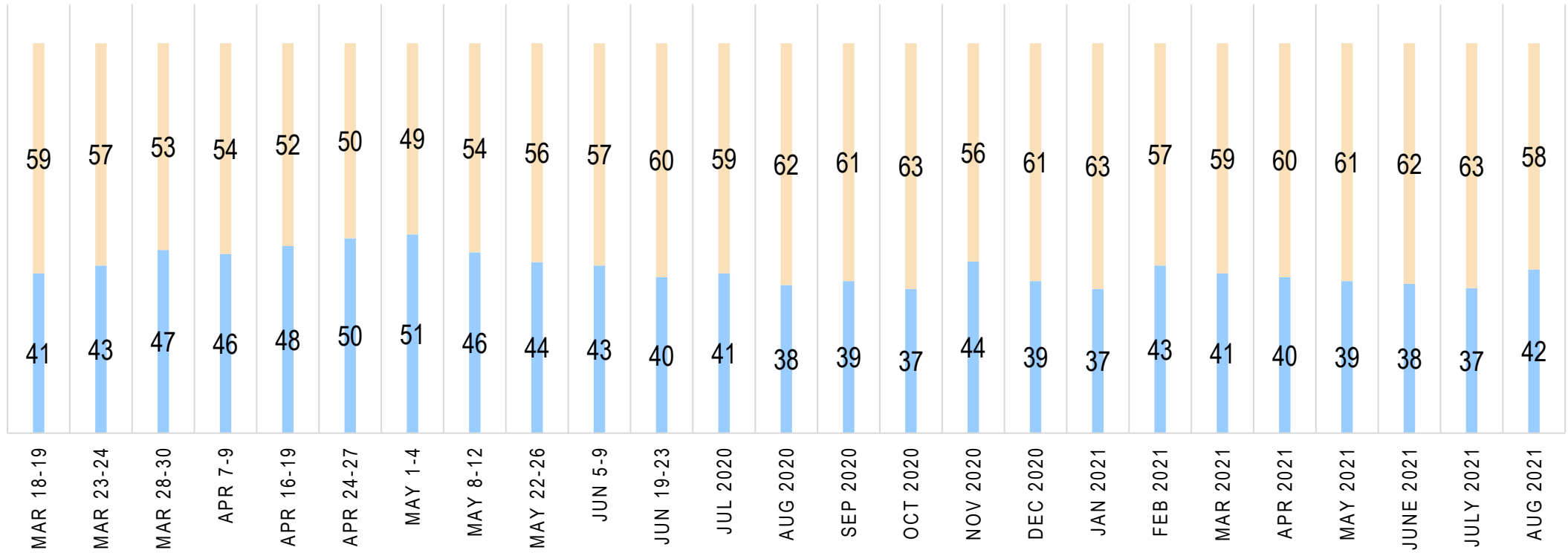
RESPONDENT PROFESSION



GENDER

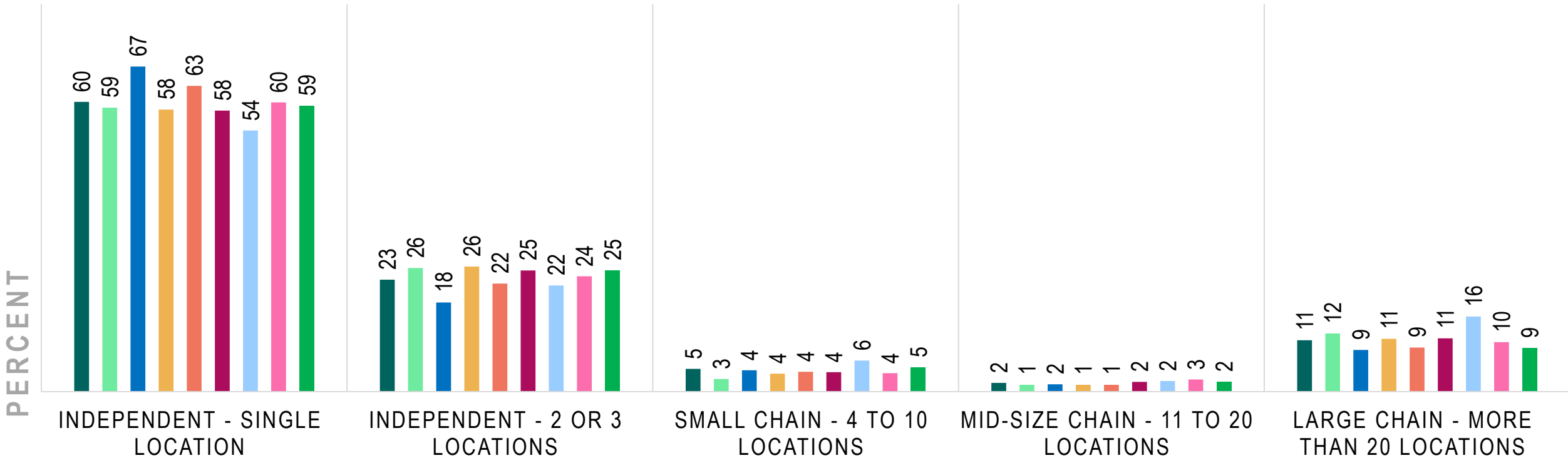
Female

Male



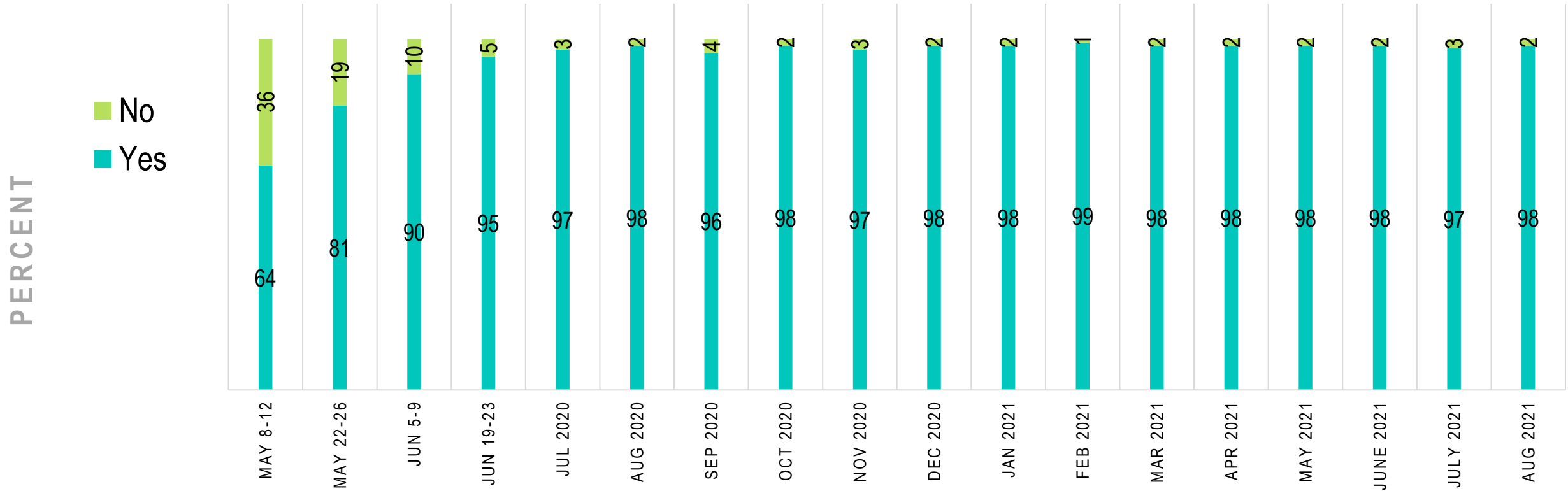
LOCATION TYPE

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



PRACTICE STATUS

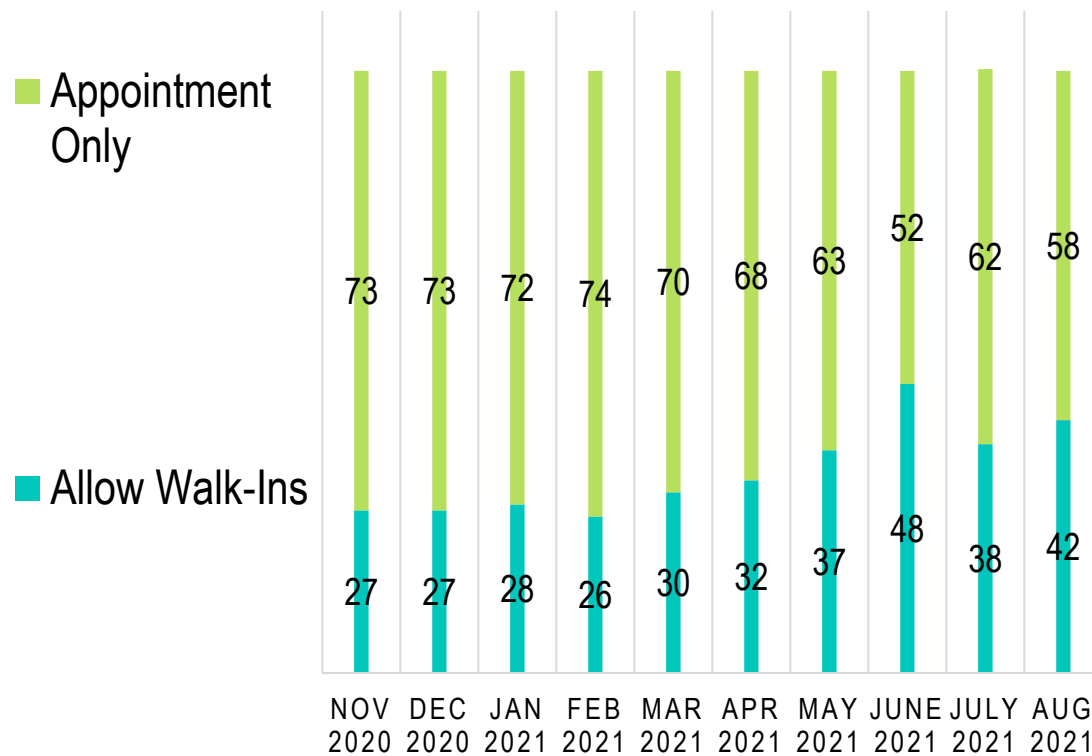
LOCATION OPEN?



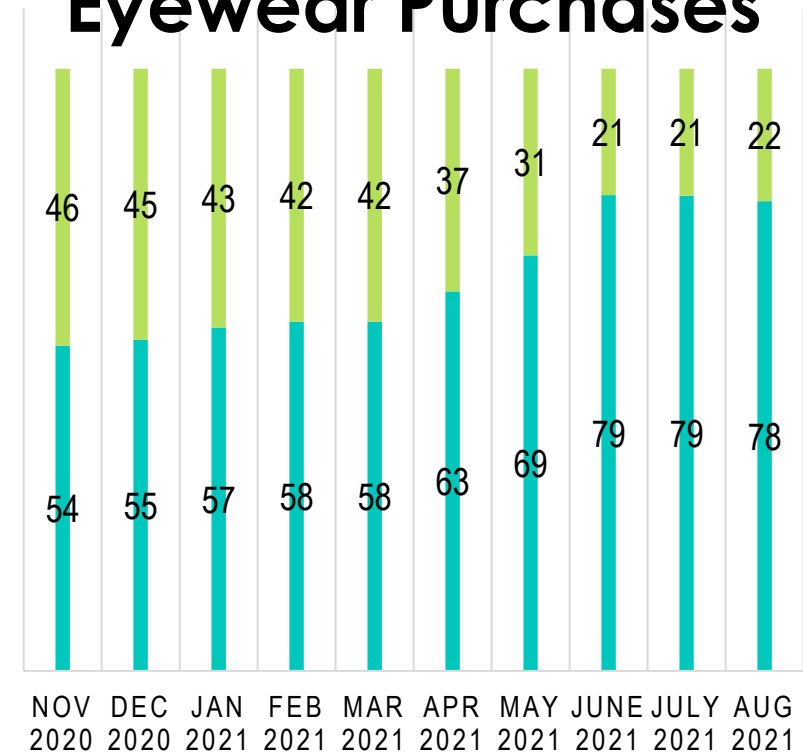
PRACTICES

WALK-INS VS. APPOINTMENTS

For Eye Exams

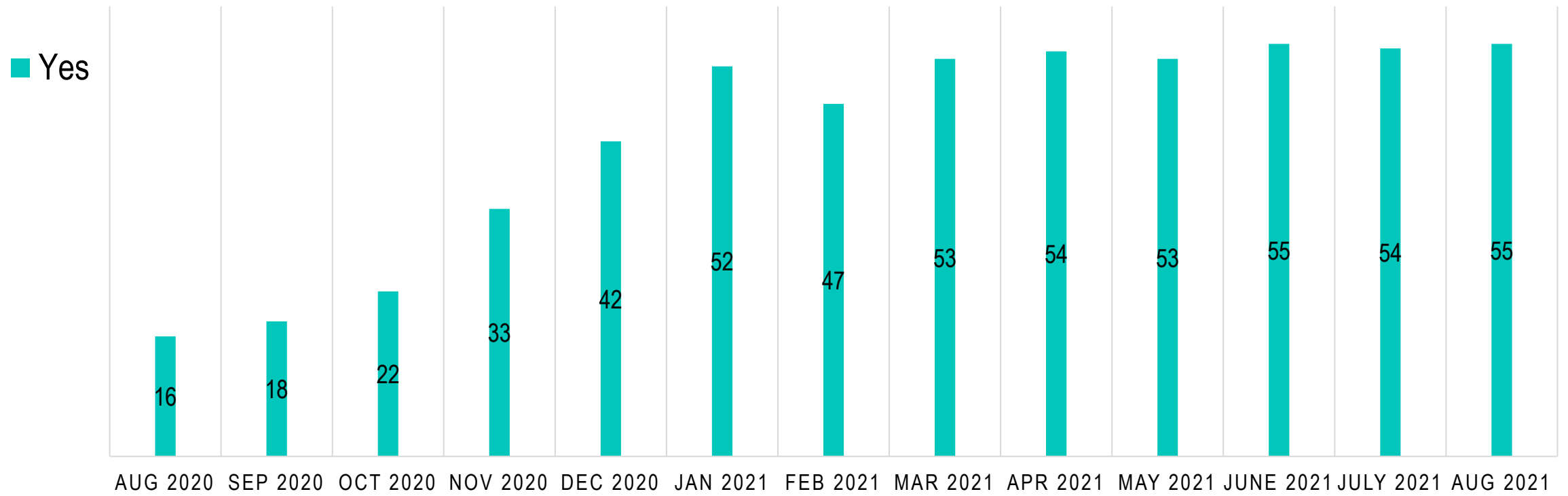


For Dispensing/ Eyewear Purchases



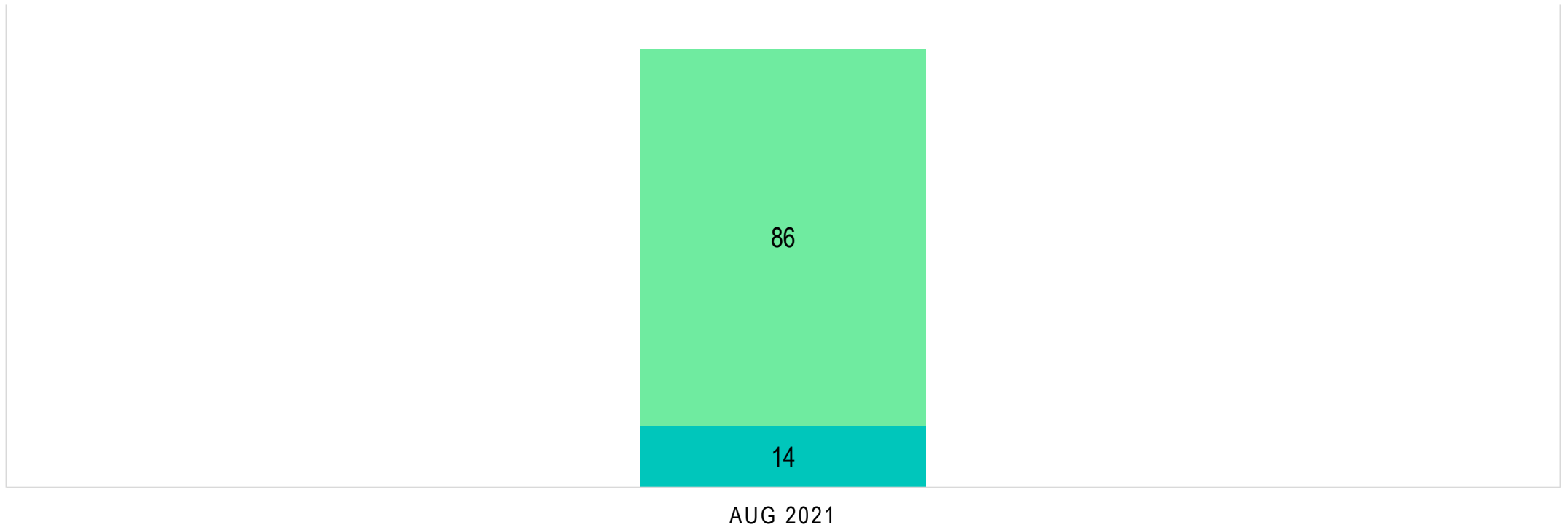
STAFF

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



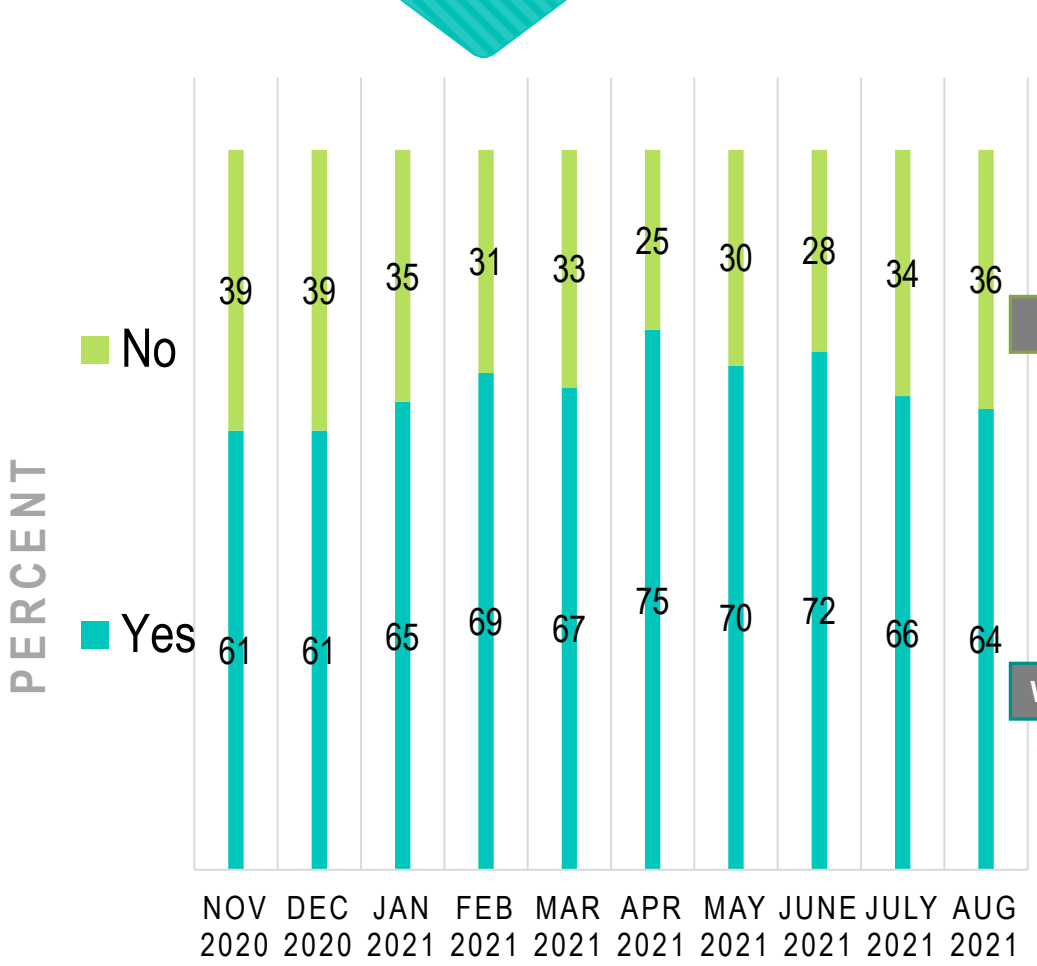
HAS ANYONE WHO WORKS AT YOUR LOCATION GOTTEN COVID-19 AFTER BEING VACCINATED?

- No
- Yes



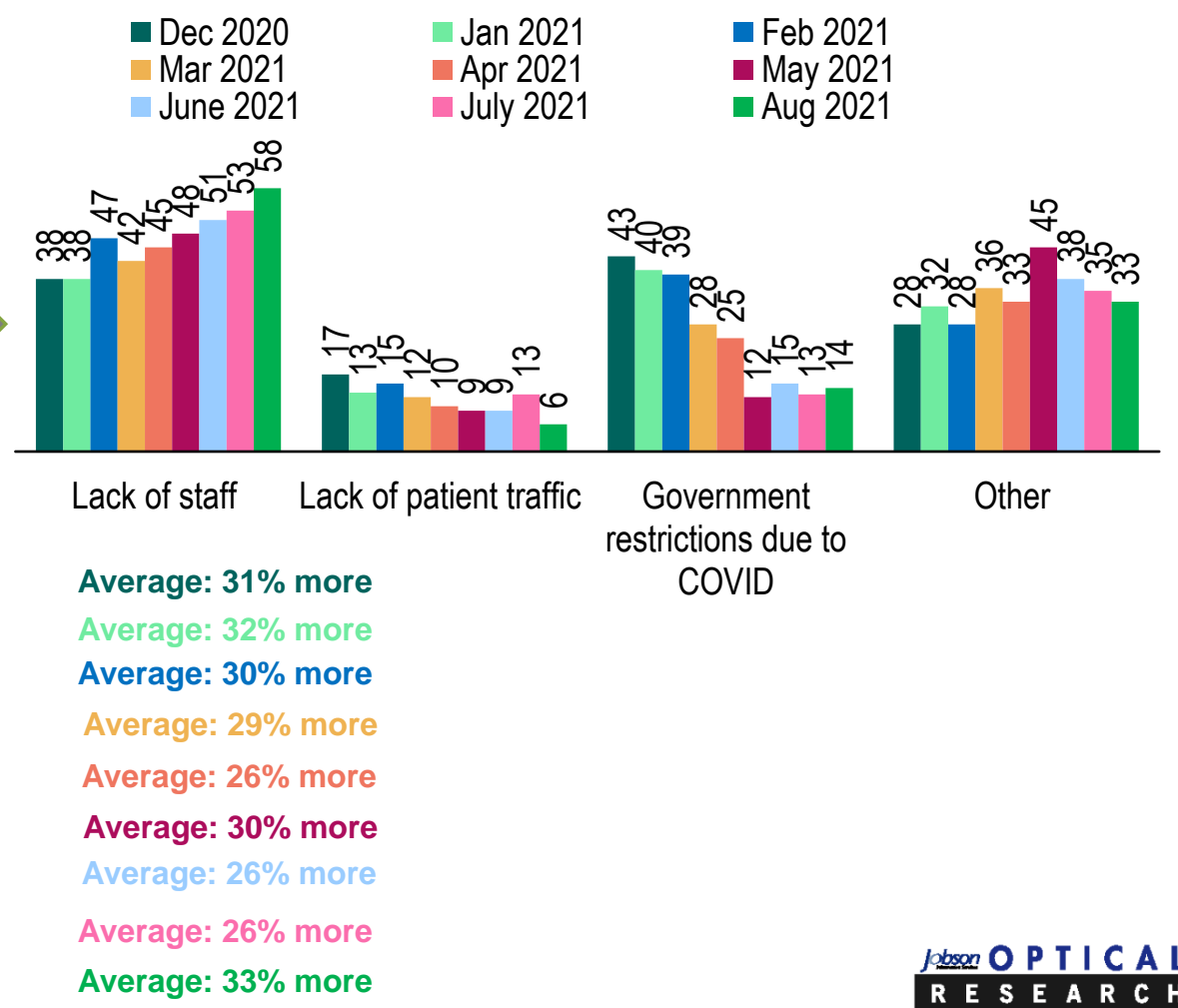
PATIENT VOLUME

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



WHY NO?

WHAT % MORE?



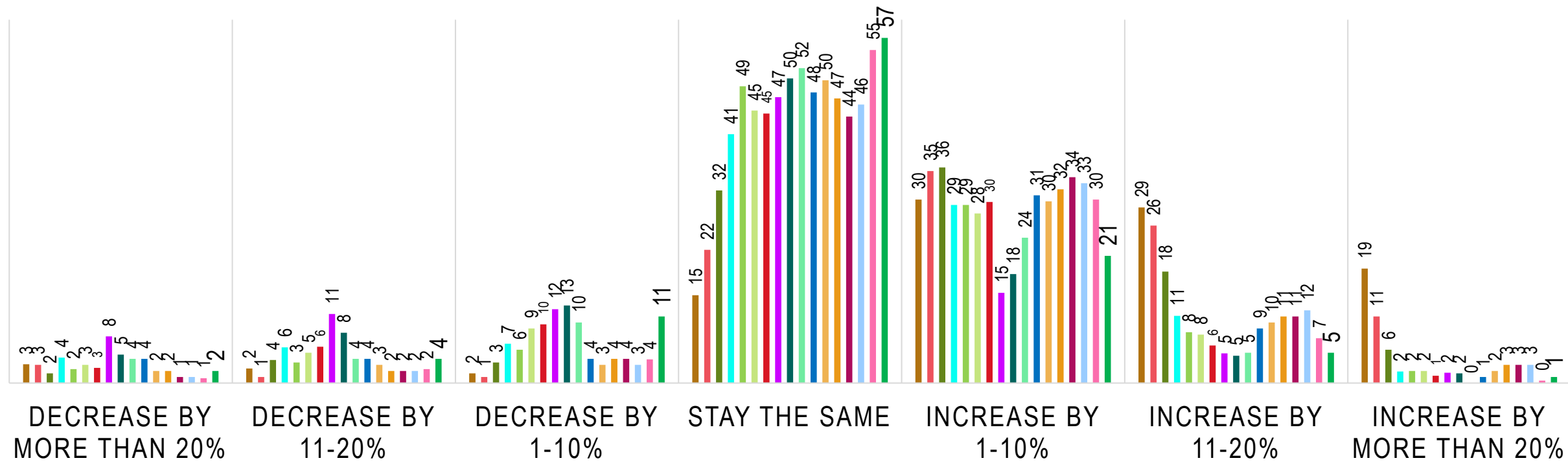
YEAR OVER YEAR COMPARISONS

	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	Aug 2021 vs Aug 2020	Aug 2021 vs Aug 2019
PROFITABILITY PER PATIENT	+18%	-5%	+39%	-2%	+29%	-2%	+19%	-1%	+30%	-1%	+10%	-1%
# PATIENTS PER DAY	+22%	-8%	+48%	-6%	+34%	-4%	+22%	-3%	+16%	-1%	+11%	-2%
REVENUE	+23%	-4%	+48%	-3%	+34%	-1%	+21%	-2%	+15%	=	+12%	-1%
OPTICAL SALES	+24%	-3%	+48%	-2%	+35%	=	+21%	-1%	+15%	+1%	+12%	=
CAPTURE RATE	+14%	=	+36%	=	+23%	+1%	+13%	=	+8%	+1%	+7%	+1%

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 ■ July 2021 ■ Aug 2021

PERCENT

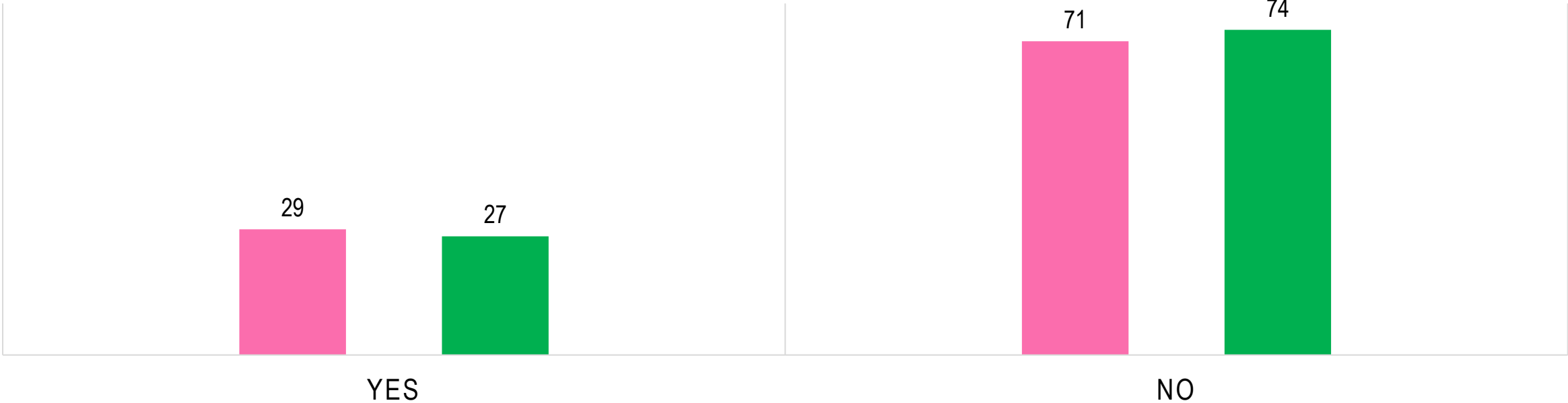


TRADE SHOWS

DID YOU TYPICALLY ATTEND VISION EXPO WEST PRE-COVID?

July 2021 Aug 2021

PERCENT

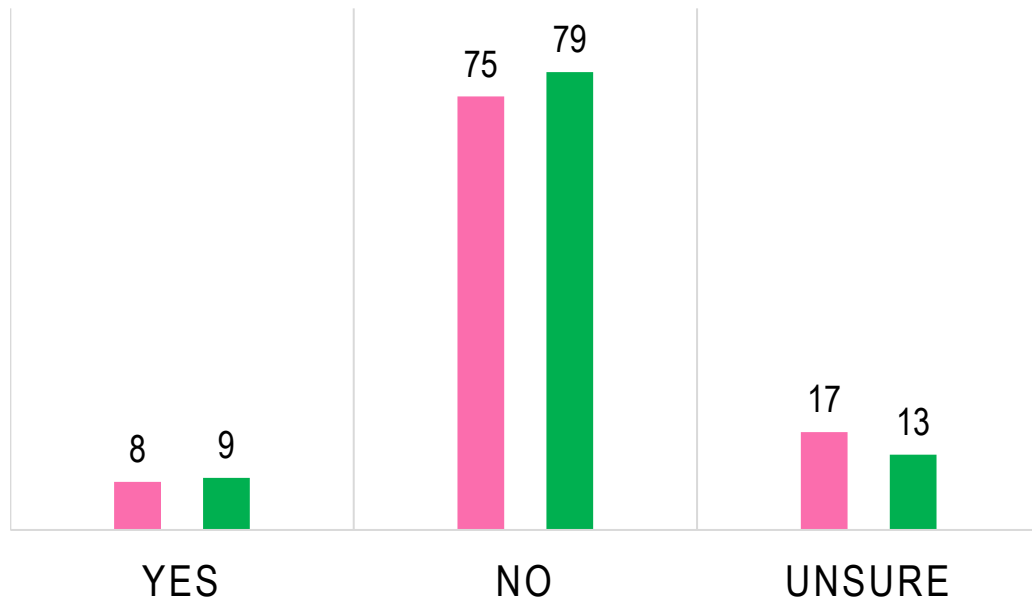


ARE YOU PLANNING ON ATTENDING VISION EXPO WEST IN LAS VEGAS IN SEPTEMBER?

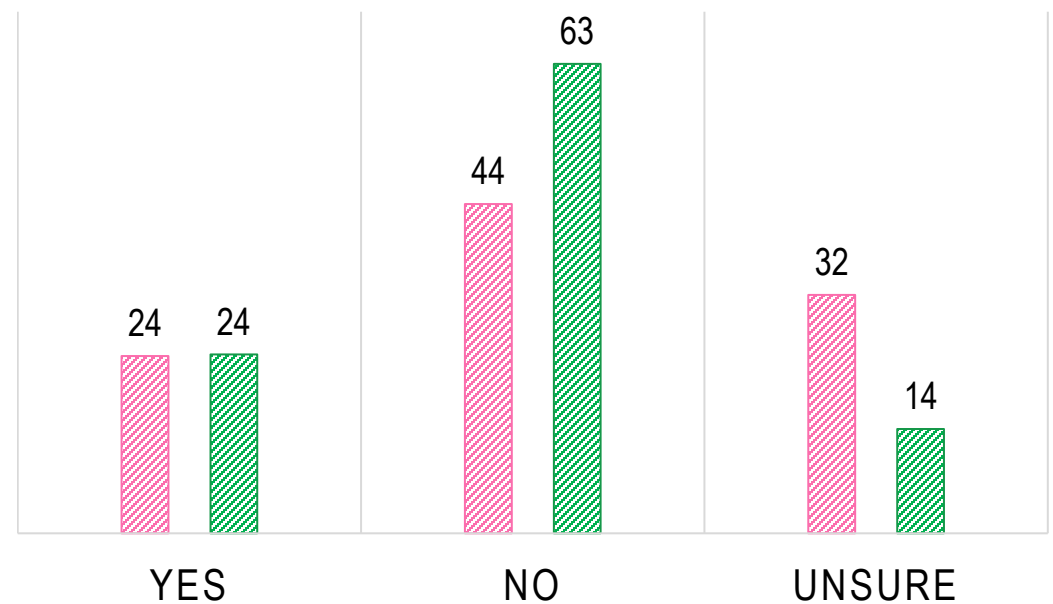
July 2021

Aug 2021

All respondents



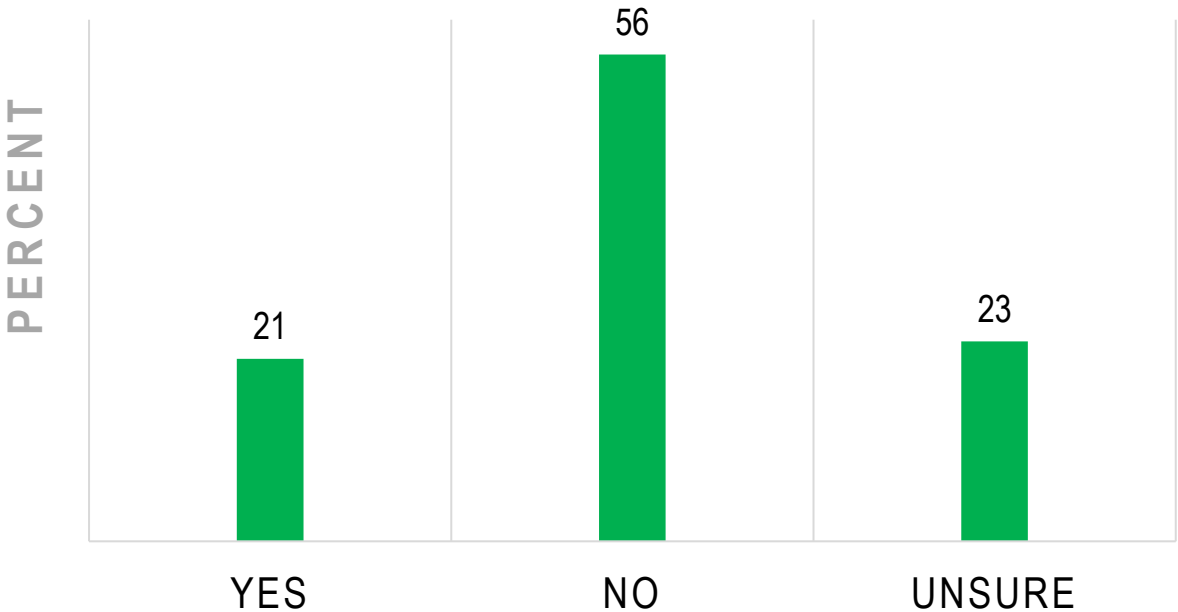
Those that typically attended Vision Expo West pre-COVID



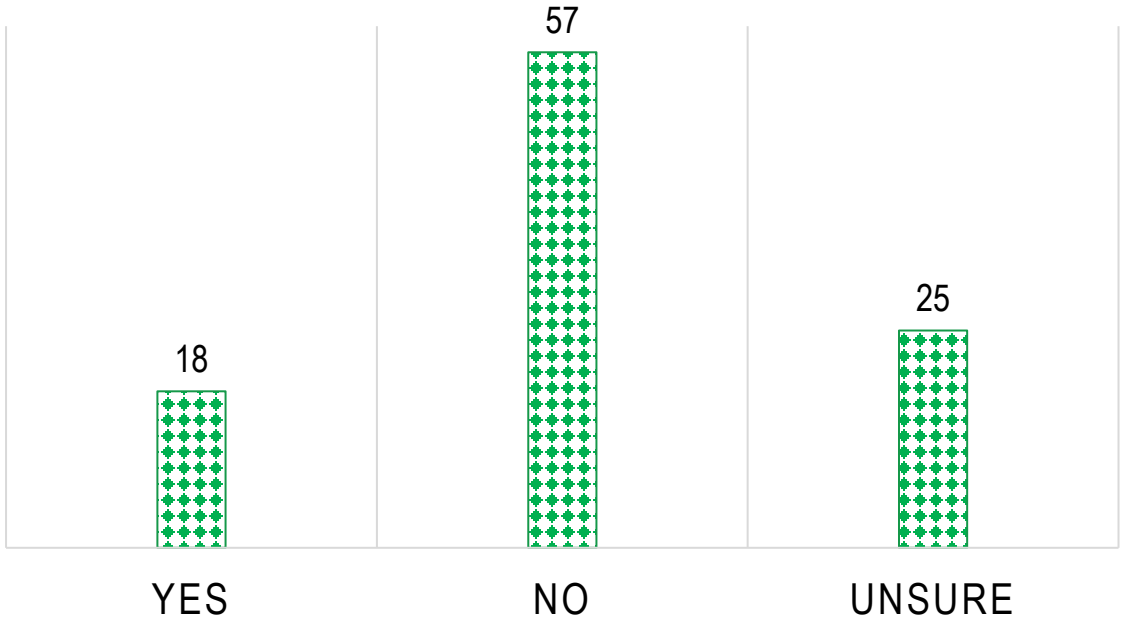
IF ATTENDEES AND EXHIBITORS WERE REQUIRED TO EITHER SHOW PROOF OF VACCINATION OR PROOF OF A NEGATIVE COVID TEST WITHIN THE LAST 48 HOURS, WOULD YOU BE MORE LIKELY TO ATTEND VISION EXPO WEST THIS YEAR?

Aug
2021

All respondents



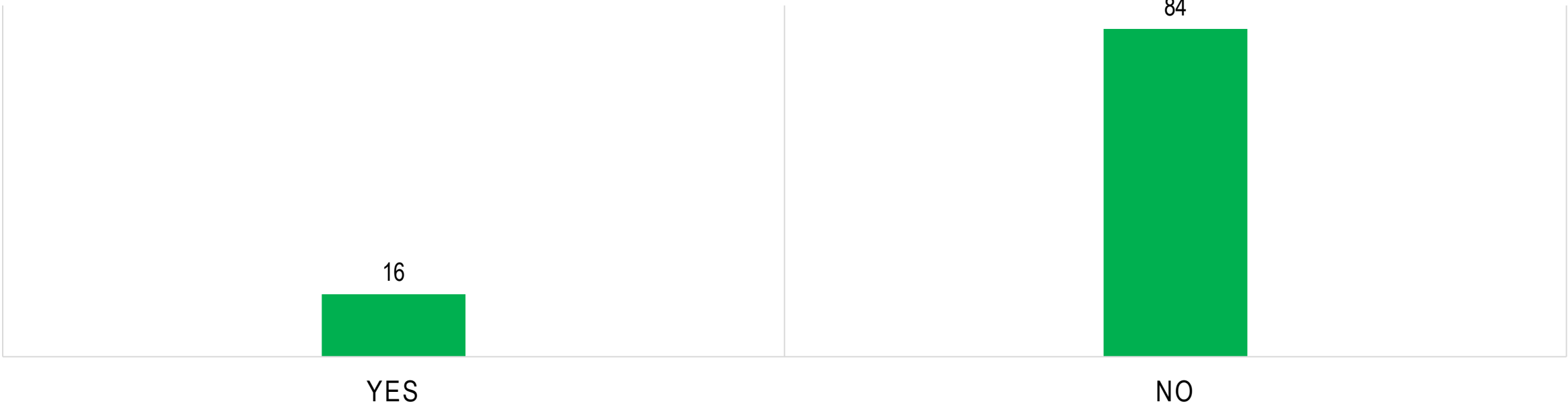
Those that said they No or Unsure about if they planned to attend Vision Expo West in September



DID YOU TYPICALLY ATTEND THE AMERICAN ACADEMY OF OPTOMETRY MEETING PRE-COVID?

■ Aug 2021

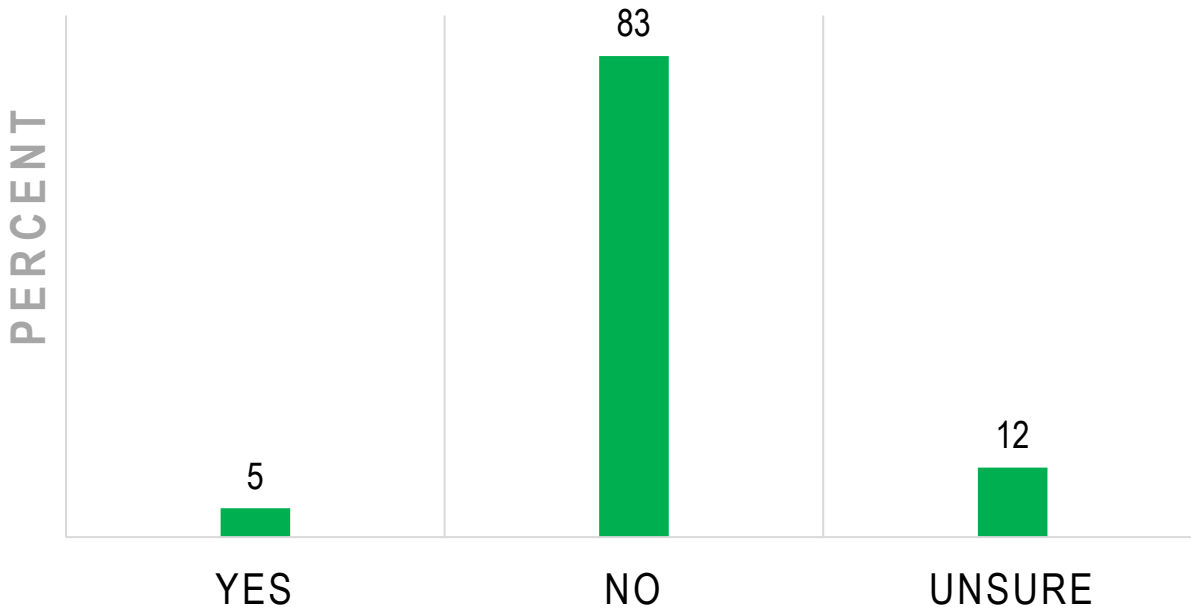
PERCENT



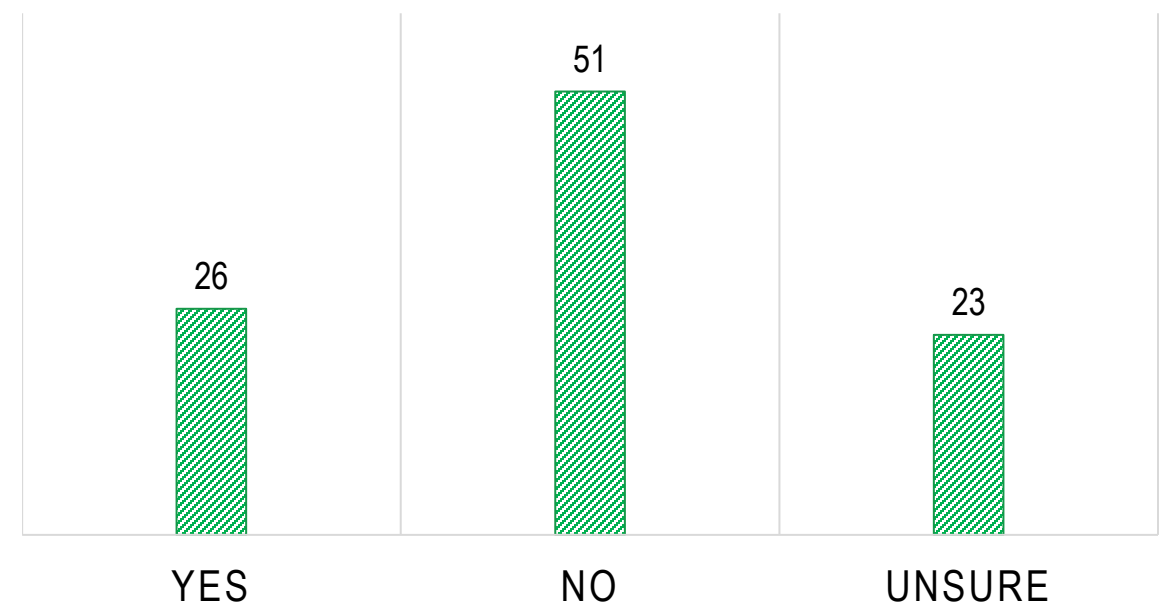
ARE YOU PLANNING ON ATTENDING THE AMERICAN ACADEMY OF OPTOMETRY MEETING IN BOSTON IN NOVEMBER?

Aug
2021

All respondents



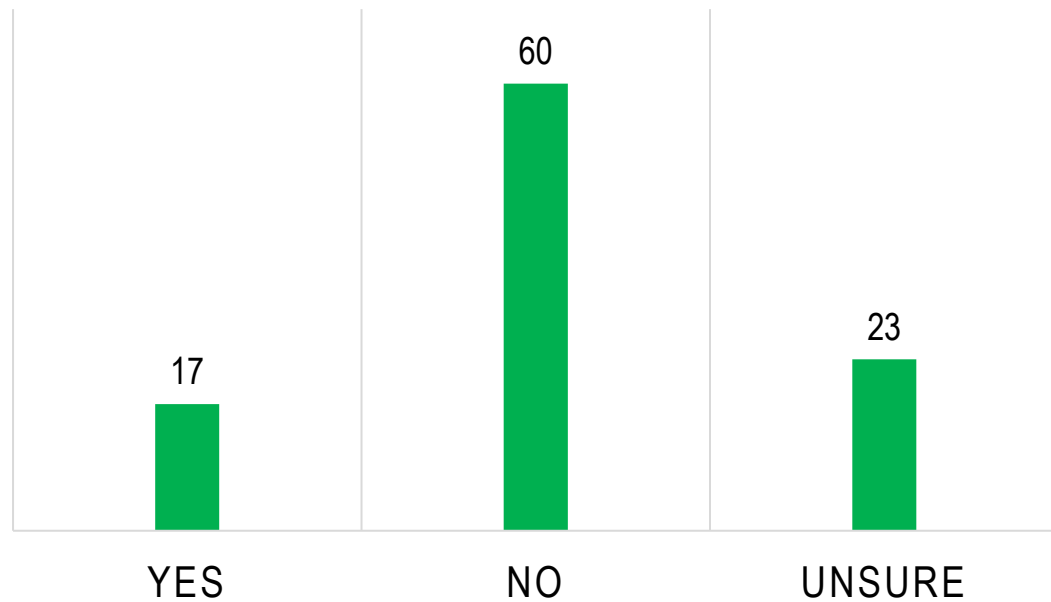
Those that typically attended The AAO Meeting pre-COVID



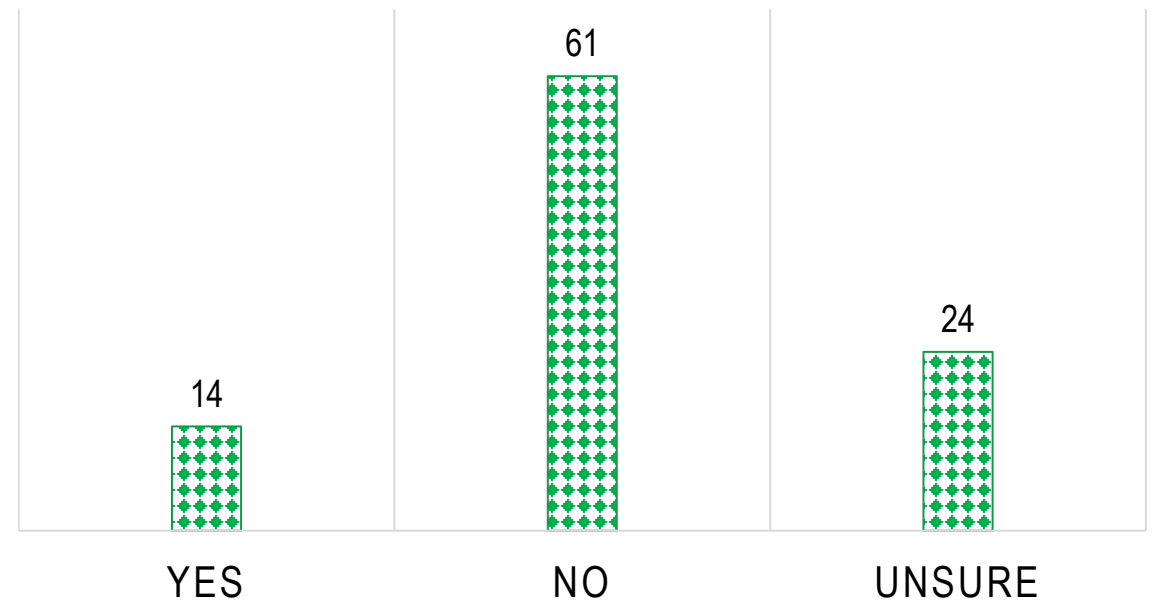
IF ATTENDEES AND EXHIBITORS WERE REQUIRED TO EITHER SHOW PROOF OF VACCINATION OR PROOF OF A NEGATIVE COVID TEST WITHIN THE LAST 48 HOURS, WOULD YOU BE MORE LIKELY TO ATTEND THE AMERICAN ACADEMY OF OPTOMETRY MEETING THIS YEAR?

Aug
2021

All respondents



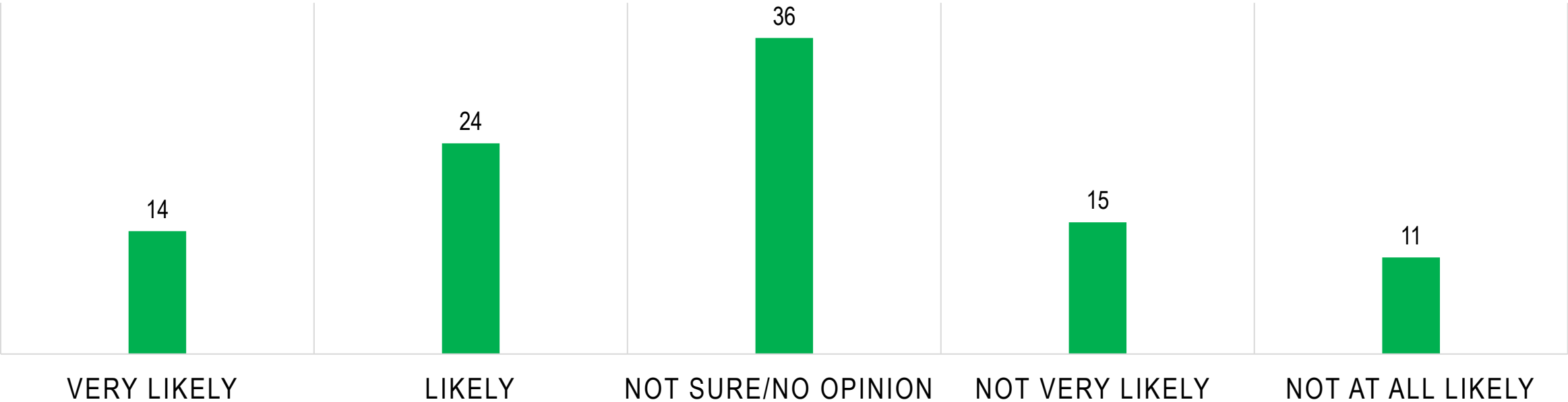
Those that said they No or Unsure about if they planned to attend the AAO Meeting in November



HOW LIKELY WOULD YOU BE TO ATTEND A TRADE SHOW, CONFERENCE OR OTHER LIVE EVENT IF IT WAS REQUIRED TO EITHER SHOW PROOF OF VACCINATION OR PROOF OF A NEGATIVE COVID TEST WITHIN THE LAST 48 HOURS?

All respondents

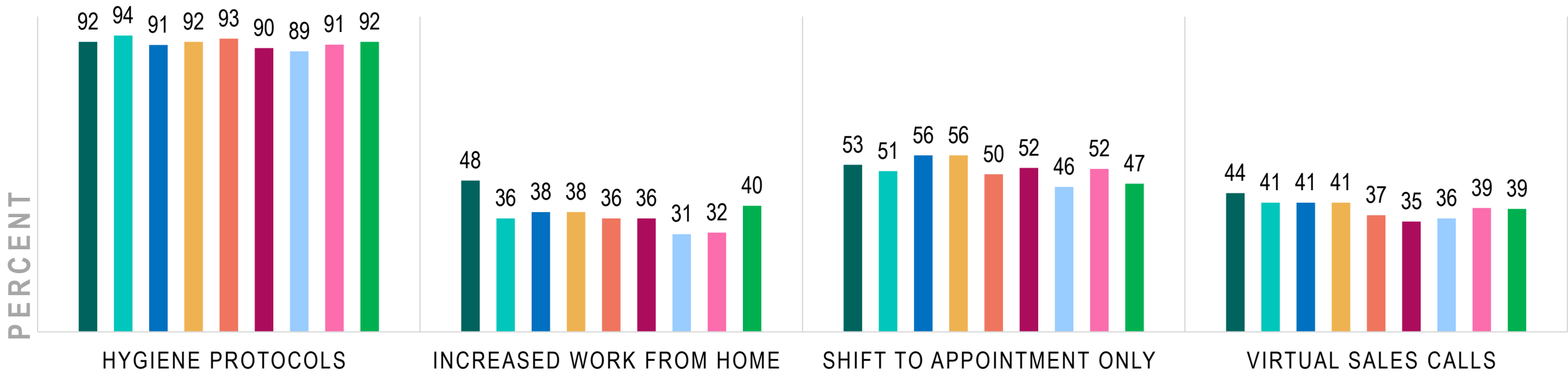
■ Aug 2021



THE FUTURE

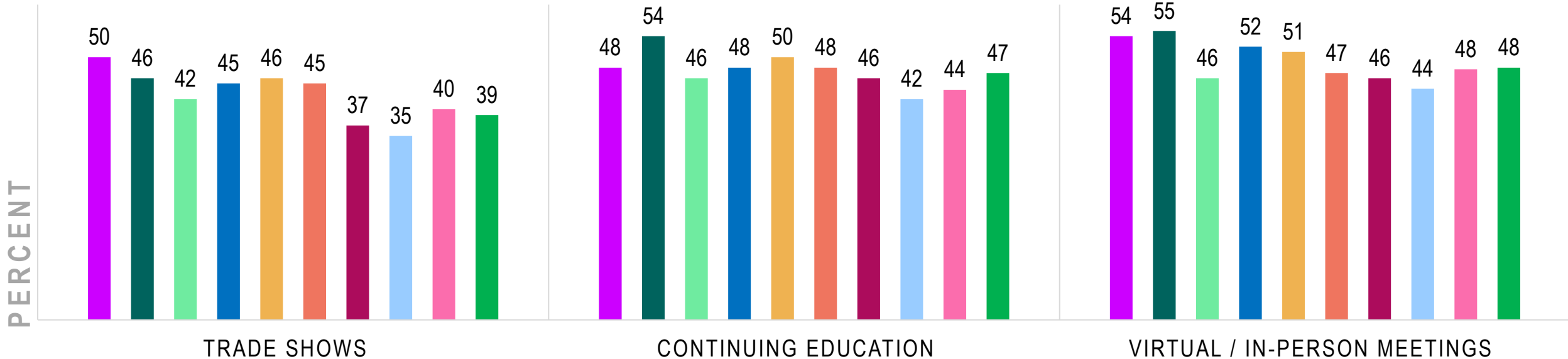
WHAT NEW PRACTICE PROCEDURES DO YOU EXPECT TO CONTINUE POST-COVID?

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



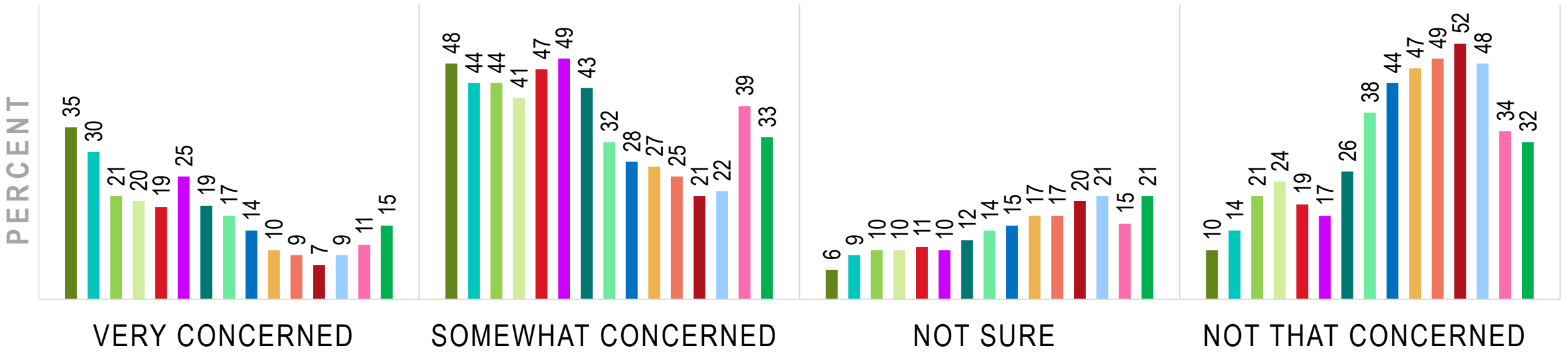
WHAT CHANGES INSTITUTED DUE TO COVID-19 HAVE CHANGED FOREVER?

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



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

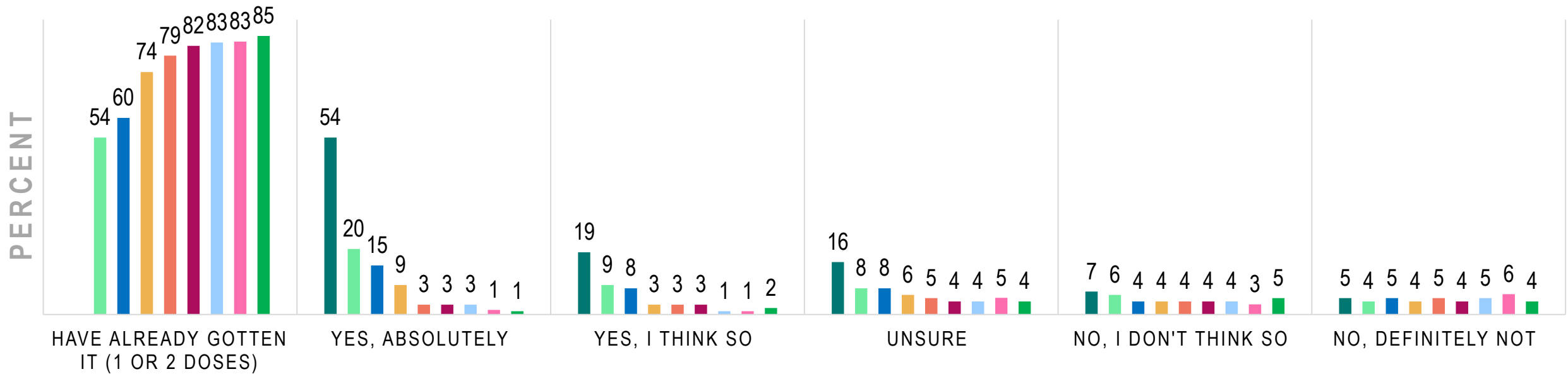
■ Jun 2020 ■ Jul 2020 ■ Aug 2020 ■ Sep 2020 ■ Oct 2020 ■ Nov 2020 ■ Dec 2020 ■ Jan 2021
■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021 ■ July 2021 ■ Aug 2021



THE VACCINE

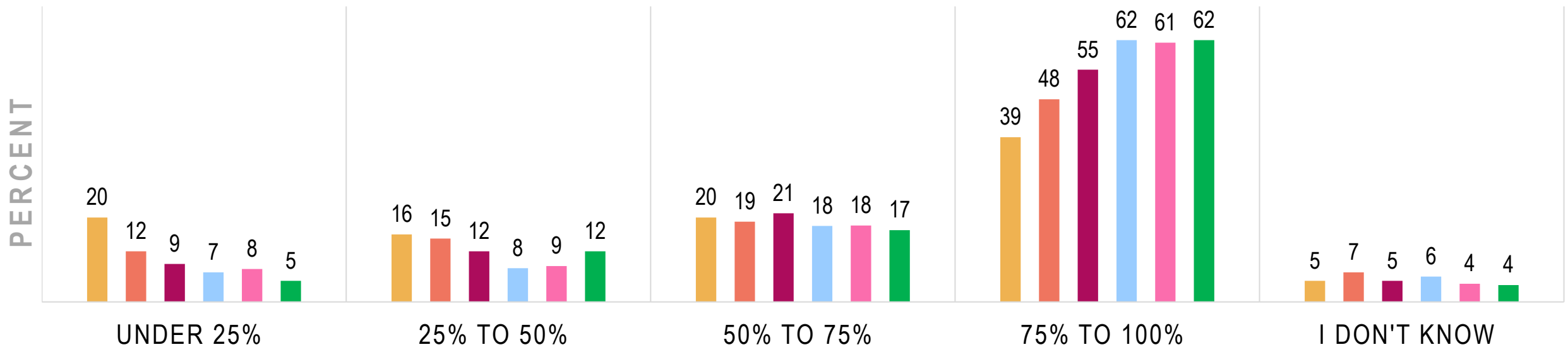
ARE YOU PLANNING TO GET THE COVID-19 VACCINE WHEN IT BECOMES AVAILABLE TO YOU?

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



WHAT PERCENTAGE OF YOUR STAFF HAS BEEN VACCINATED?

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



IF NOT PLANNING TO GET THE COVID-19 VACCINE:

WHY NO?

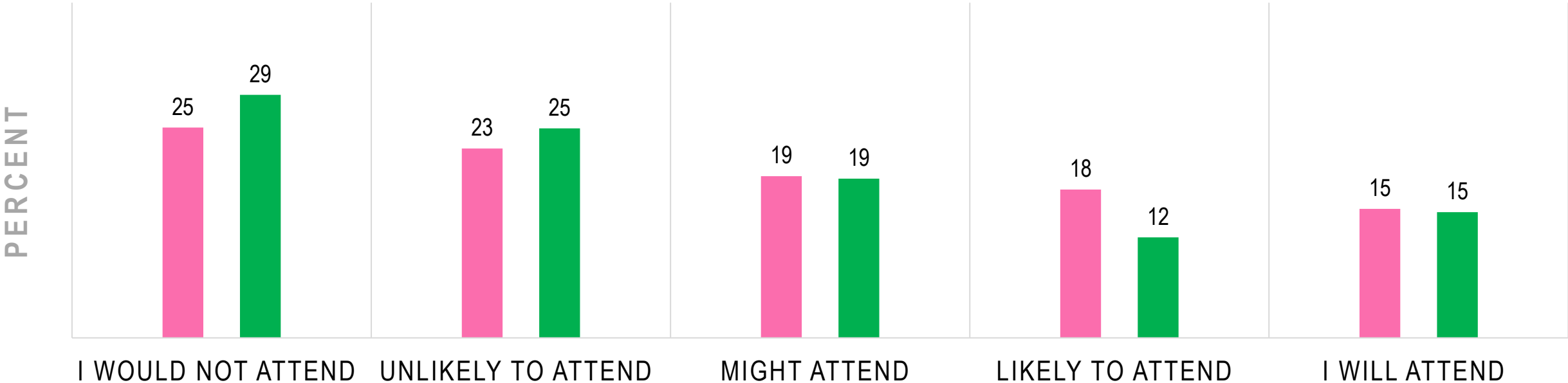
Check all that apply.

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



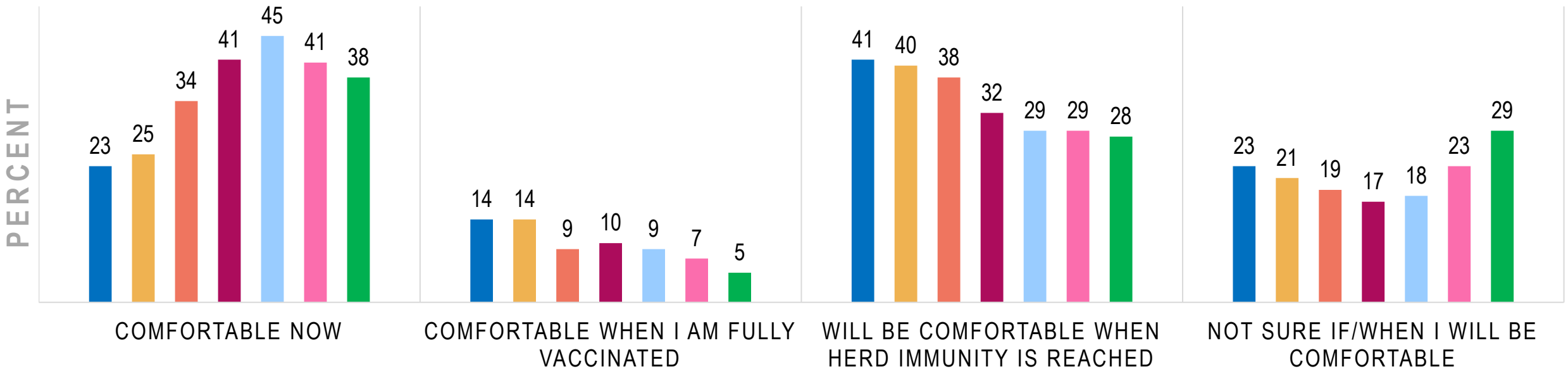
HOW LIKELY WOULD YOU BE TO ATTEND AN IN-PERSON INDUSTRY EVENT IN THE NEXT MONTH?

July 2021 Aug 2021



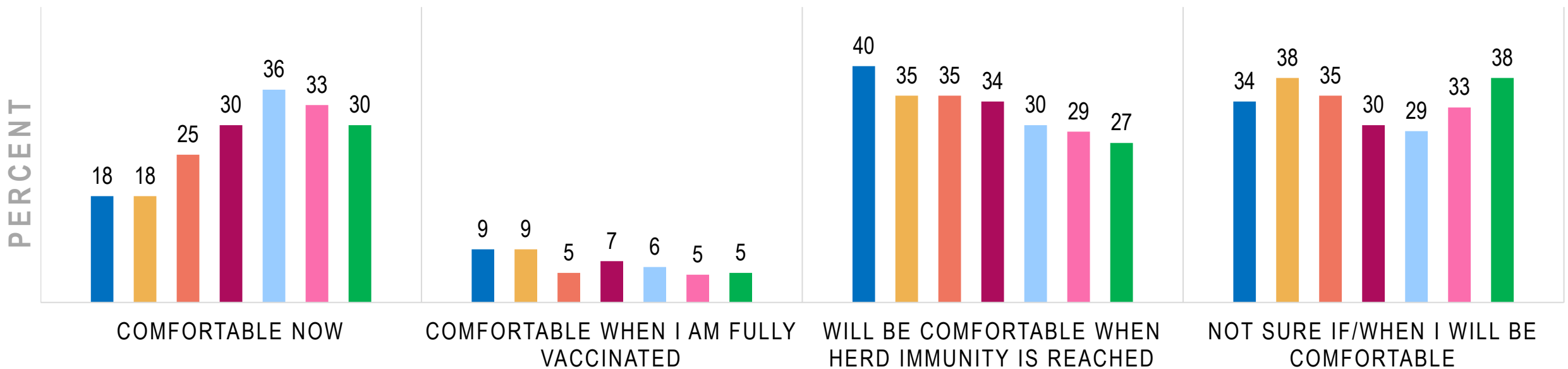
HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? ATTENDING TRADE SHOWS

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

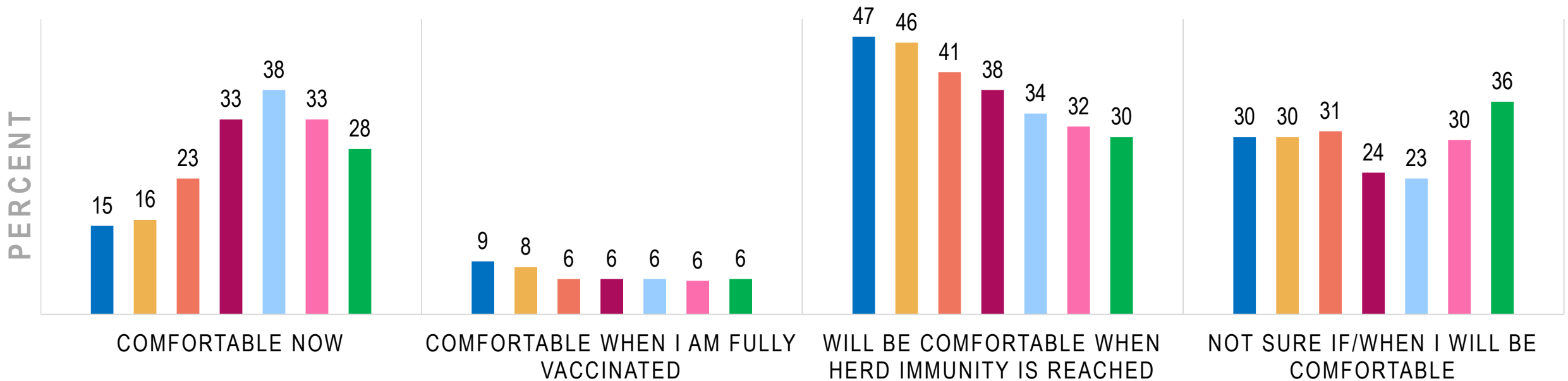
■ Feb 2021 ■ Mar 2021 ■ Apr 2021 ■ May 2021 ■ June 2021 ■ July 2021 ■ Aug 2021



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

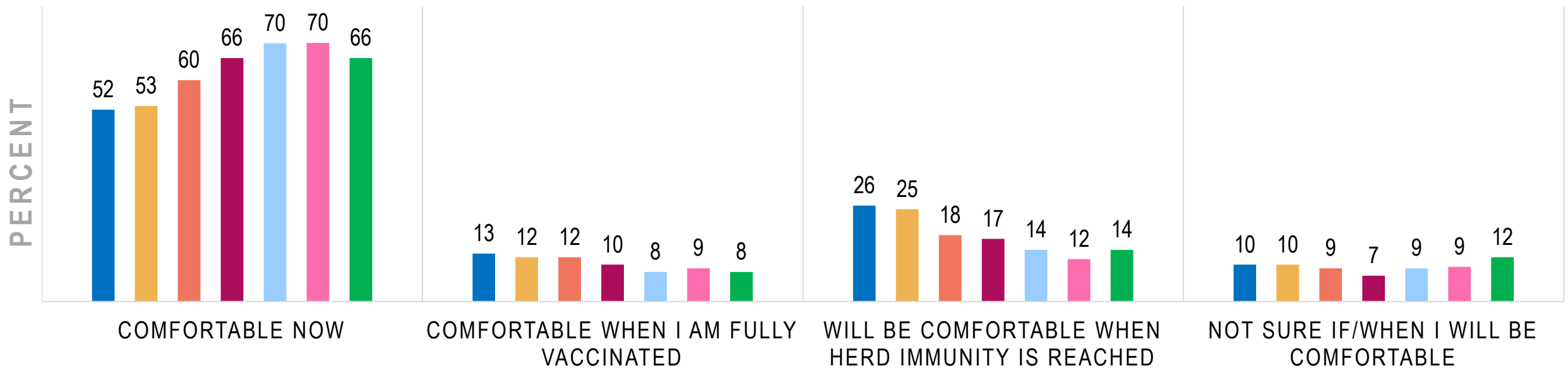
REDUCING PPE USE IN THE OFFICE

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



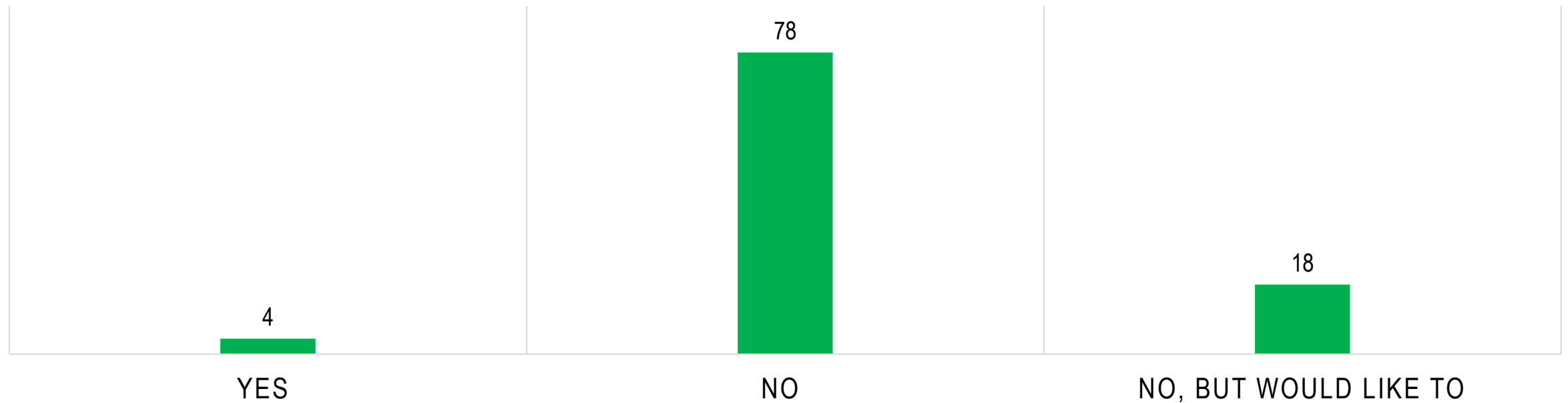
HOW DOES THE CONTINUED INCREASE IN THE NUMBER OF AMERICANS BEING VACCINATED AFFECT YOUR COMFORT LEVEL FOR THE FOLLOWING? HAVING REPS VISIT THE OFFICE AGAIN

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



ARE YOU REQUIRING PATIENTS TO SHOW PROOF OF VACCINATION OR RECENT NEGATIVE COVID TESTS TO COME INTO YOUR DISPENSARY AND/OR FOR THEIR EXAMS?

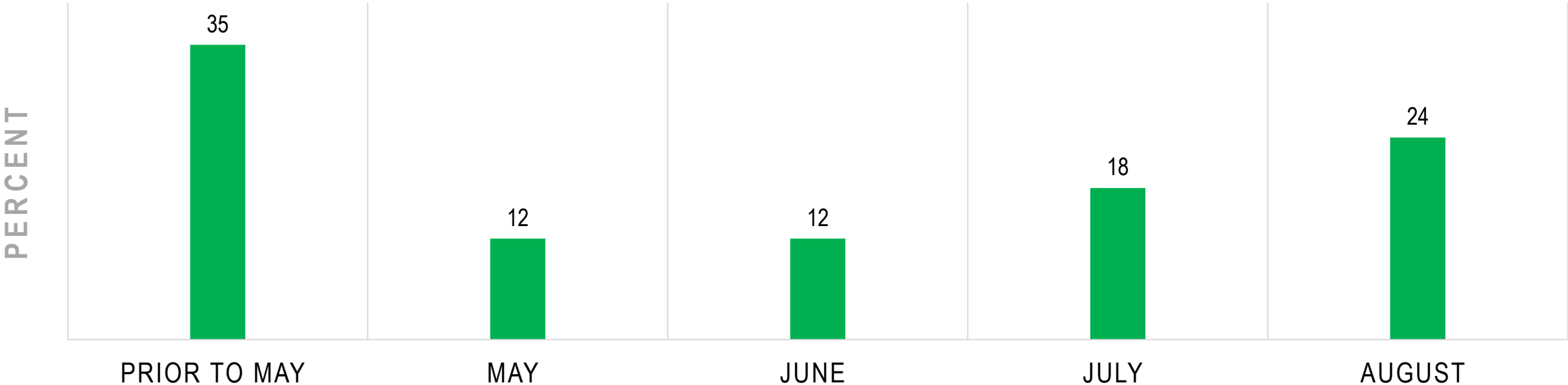
■ Aug 2021



IF REQUIRING PATIENTS TO SHOW PROOF OF VACCINATION OR RECENT NEGATIVE COVID TEST:

WHEN DID YOU START TO REQUIRE THIS?

■ Aug 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

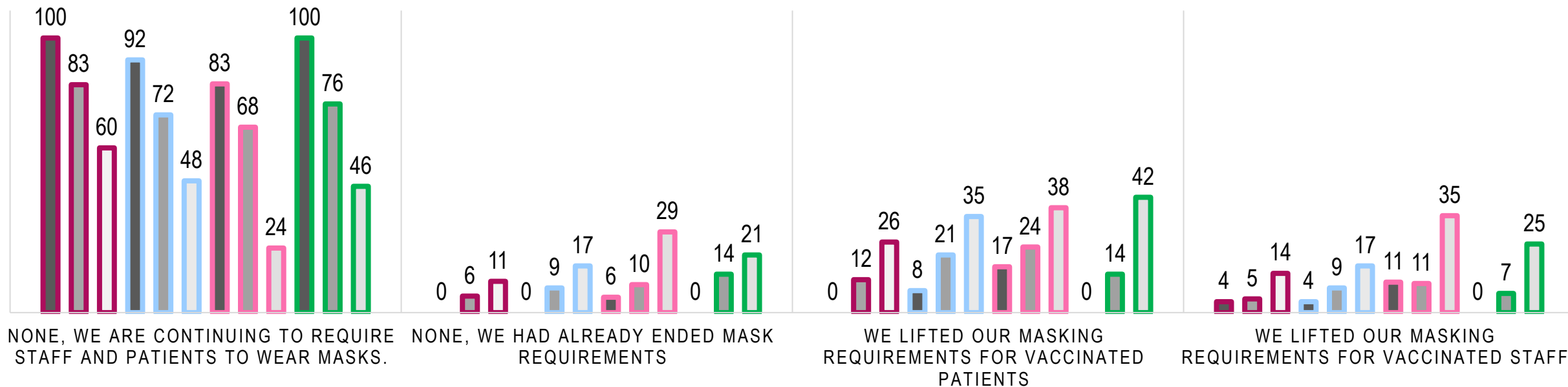
July 2021

Aug 2021

Practice Type:

- Exams only
- Exams + dispensary
- Dispensary only

PERCENT



HOW ARE YOU COMMUNICATING THE POLICY TO PATIENTS?

Check all that apply.

May 2021

June 2021

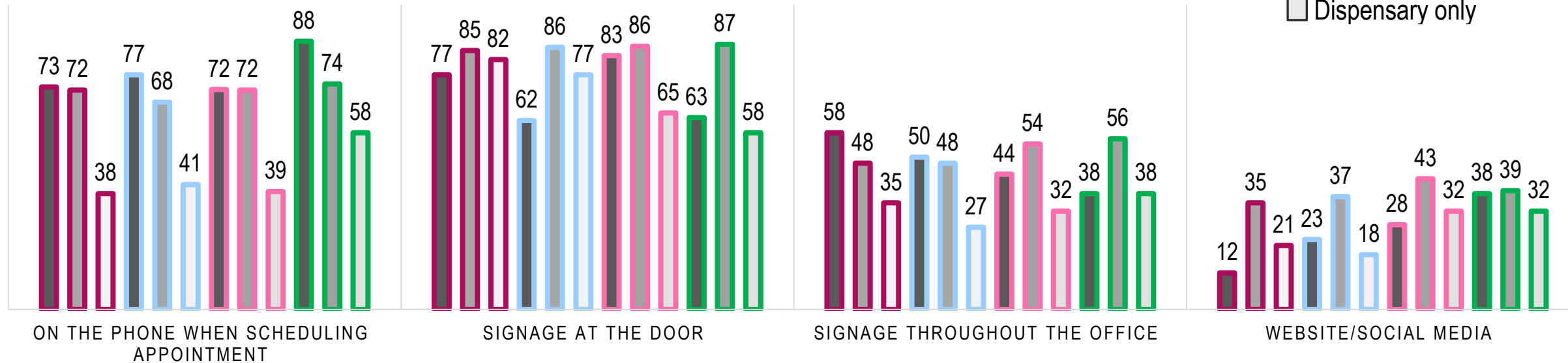
July 2021

Aug 2021

Practice Type:

- Exams only
- Exams + dispensary
- Dispensary only

PERCENT



WHICH OF THESE STATEMENTS DO YOU AGREE WITH?

Check all that apply.

May 2021

June 2021

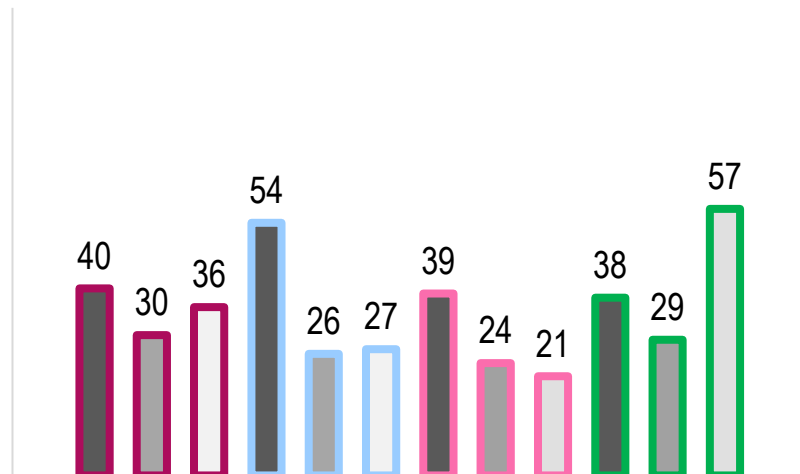
July 2021

Aug 2021

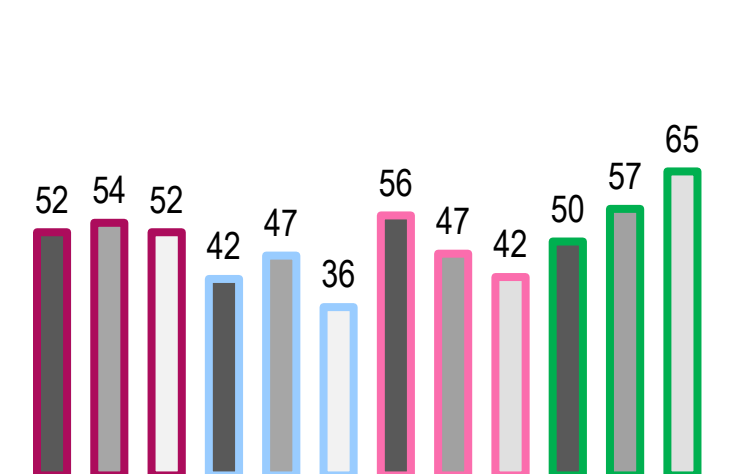
Practice Type:

- Exams only
- Exams + dispensary
- Dispensary only

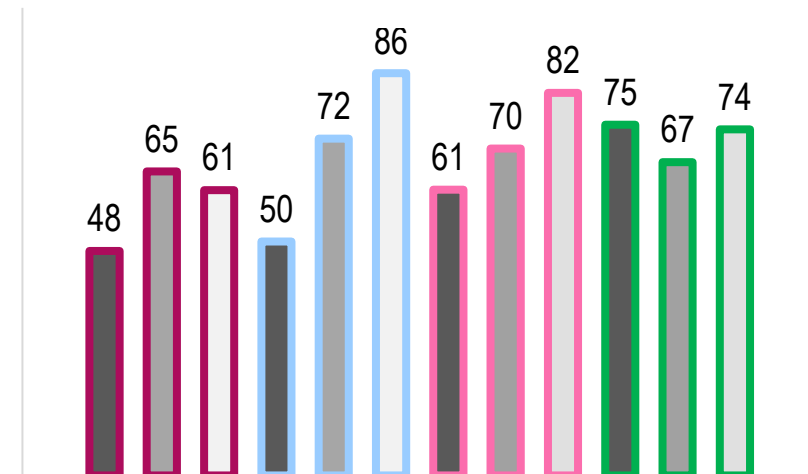
PERCENT



IT IS CONFUSING TO ME IF THE NEW CDC GUIDELINES MEAN VACCINATED PEOPLE DO NOT NEED TO WEAR A MASK IN MY OPTICAL LOCATION.



IT IS CONFUSING TO PATIENTS IF THE NEW CDC GUIDELINES MEAN VACCINATED PEOPLE DO NOT NEED TO WEAR A MASK IN MY OPTICAL LOCATION.



SOME VACCINATED PATIENTS ARE NOW EXPECTING TO NOT HAVE TO WEAR A MASK AT MY OPTICAL LOCATION.

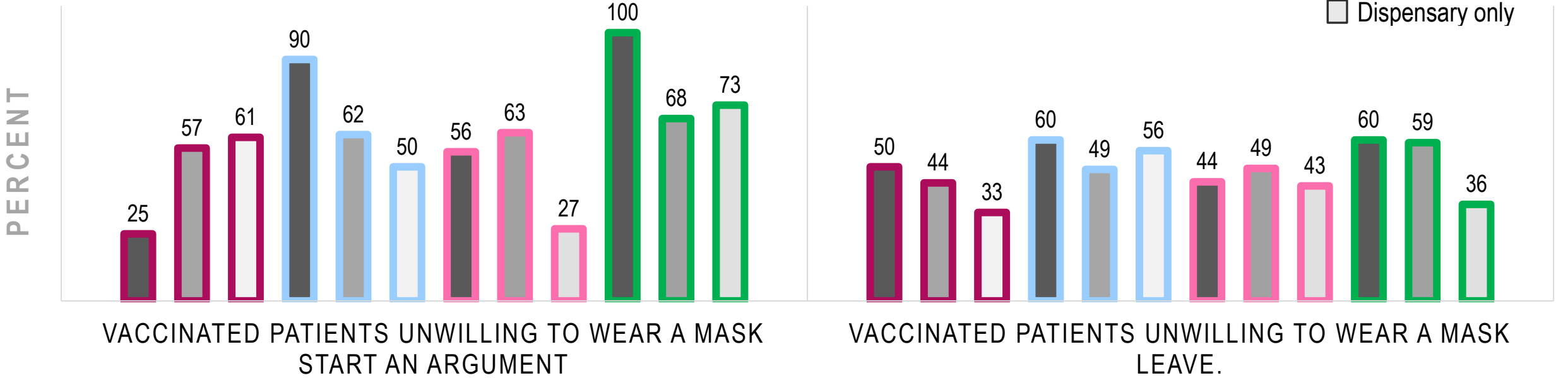
IF AGREED THAT SOME VACCINATED PATIENTS ARE NOW EXPECTING TO NOT HAVE TO WEAR A MASK AT THEIR OPTICAL LOCATION:

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.

May 2021 June 2021 July 2021 Aug 2021

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



SUPPLY CHAIN

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

■ July 2021 ■ Aug 2021

PERCENT

