

# CORONAVIRUS ECP STUDY

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

**R E S E A R C H**

Wave 28

December 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.
- Wave 14 ran from Aug 21 – 27, 2020. 576 completes.

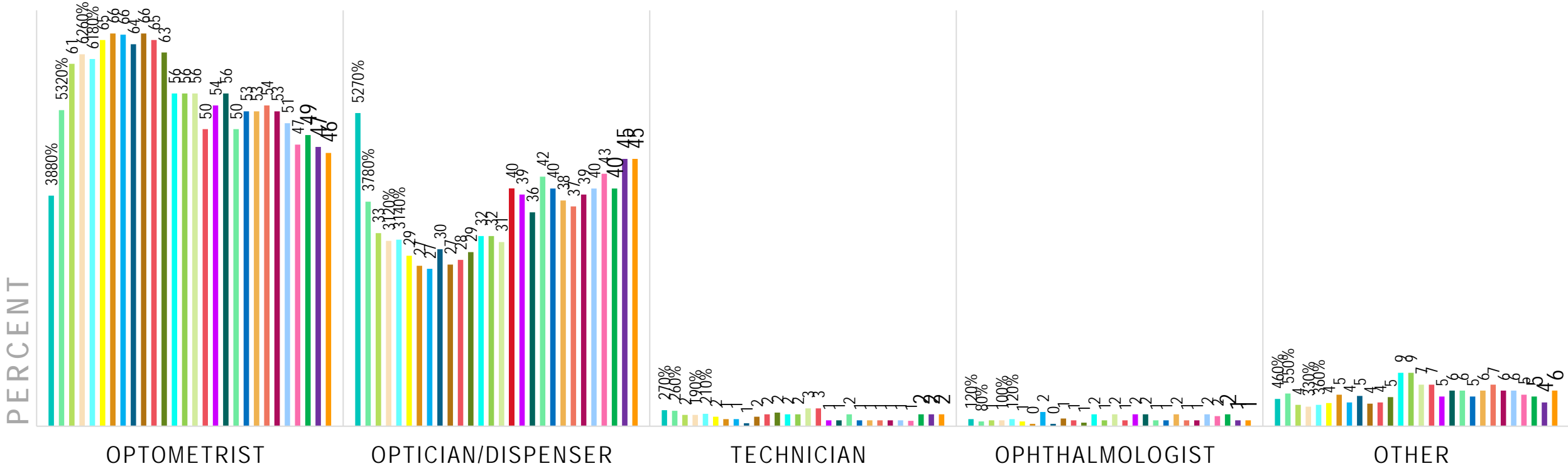
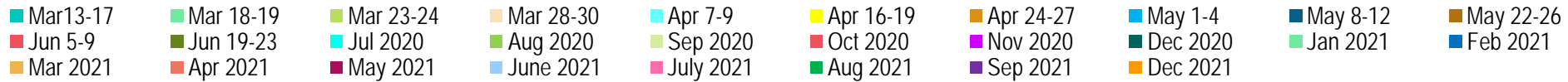
Questions varied slightly in each wave.

Comparisons are shown wherever possible.

- 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.
- Wave 27 ran from September 27-30, 2021. 530 completes.
- Wave 28 ran from December 8-31, 2021. 564 completes.

# RESPONDENT DEMOGRAPHICS

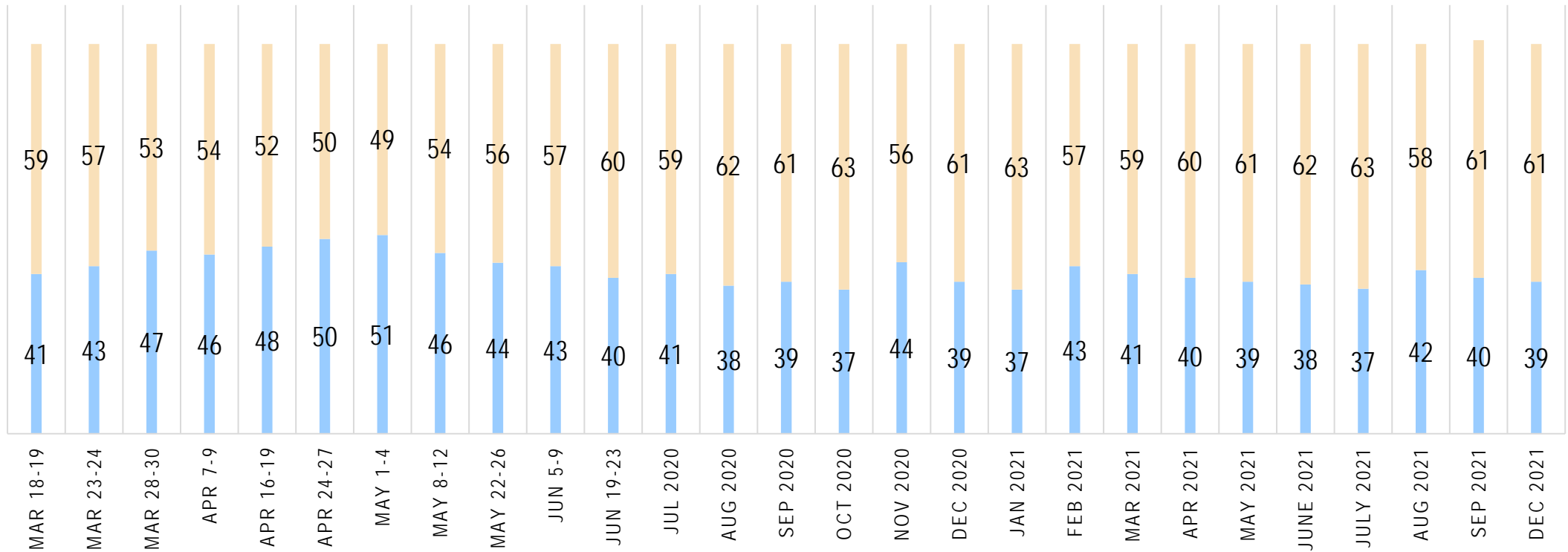
# RESPONDENT PROFESSION



# GENDER

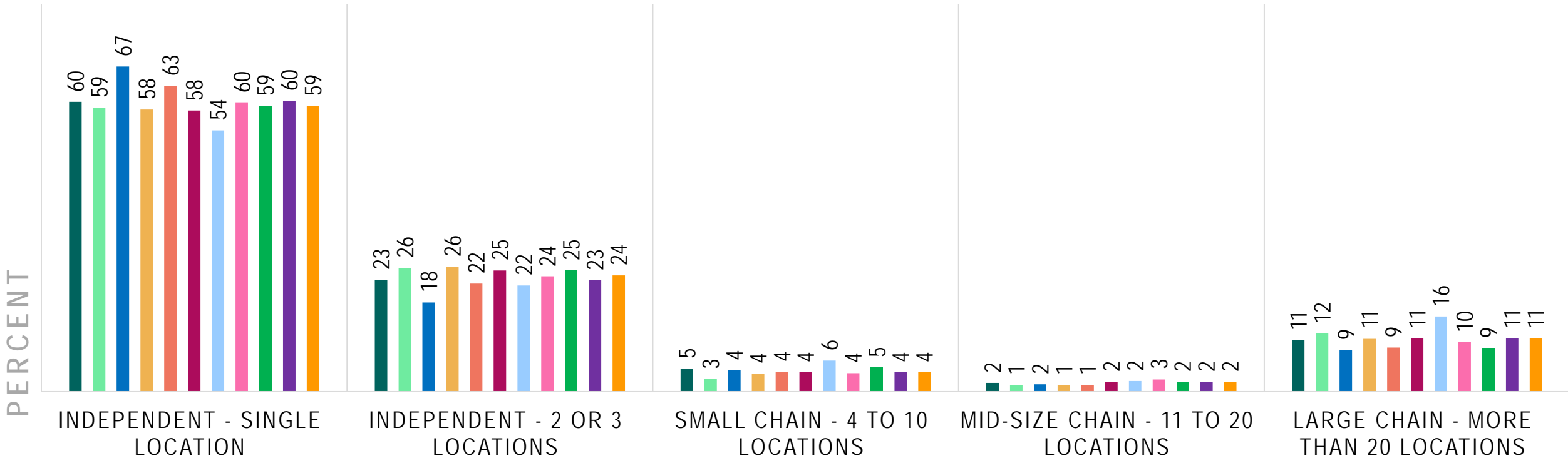
Female

Male



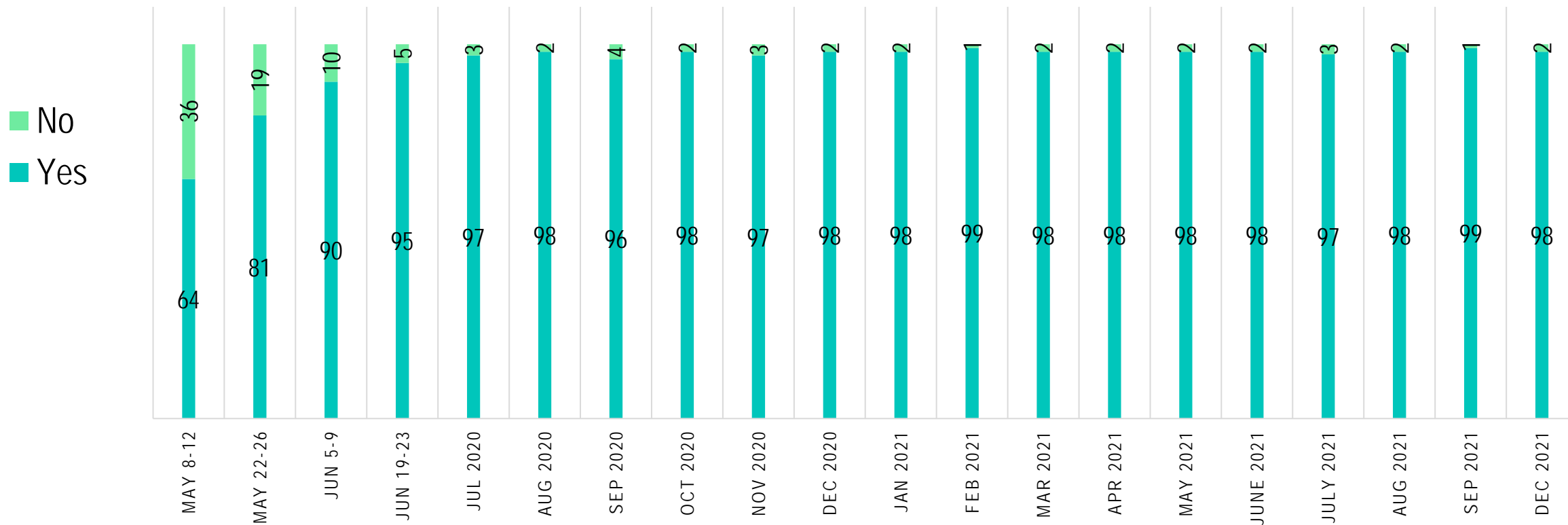
# LOCATION TYPE

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



# PRACTICE STATUS

# LOCATION OPEN?





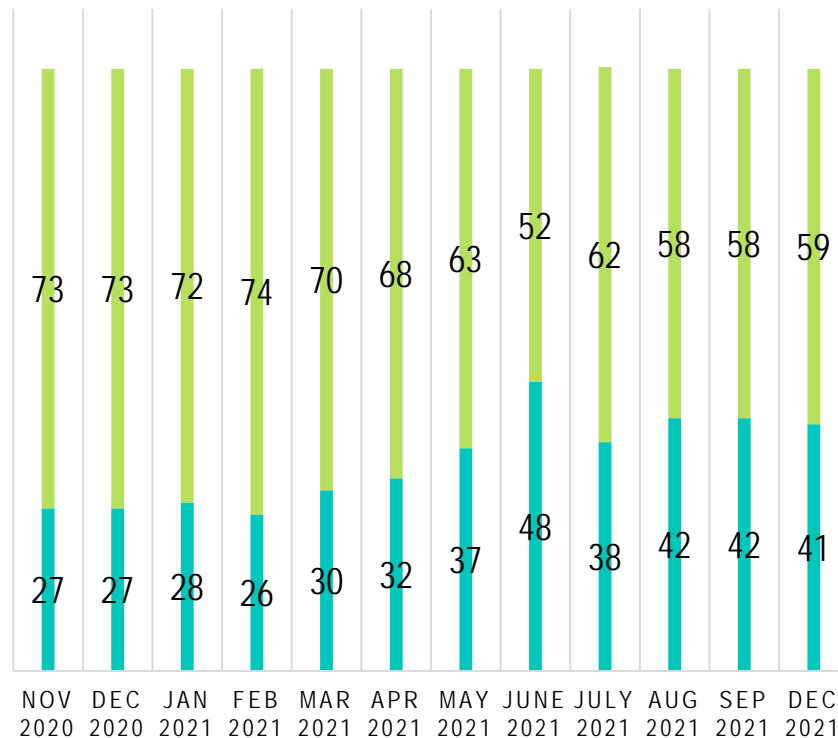
# PRACTICES

# WALK-INS VS. APPOINTMENTS

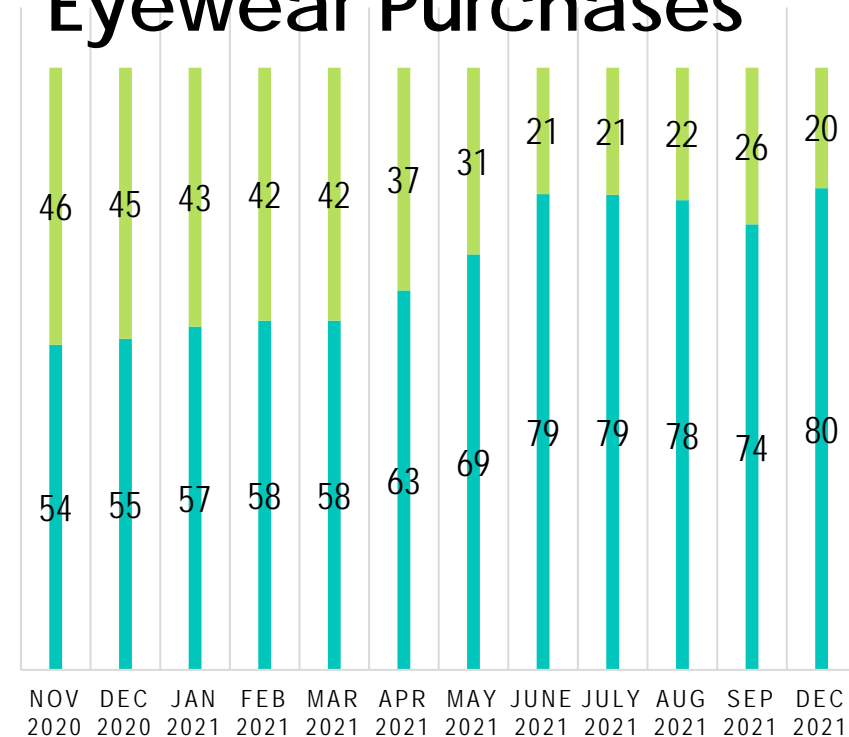
## For Eye Exams

■ Appointment Only

■ Allow Walk-Ins



## For Dispensing/ Eyewear Purchases



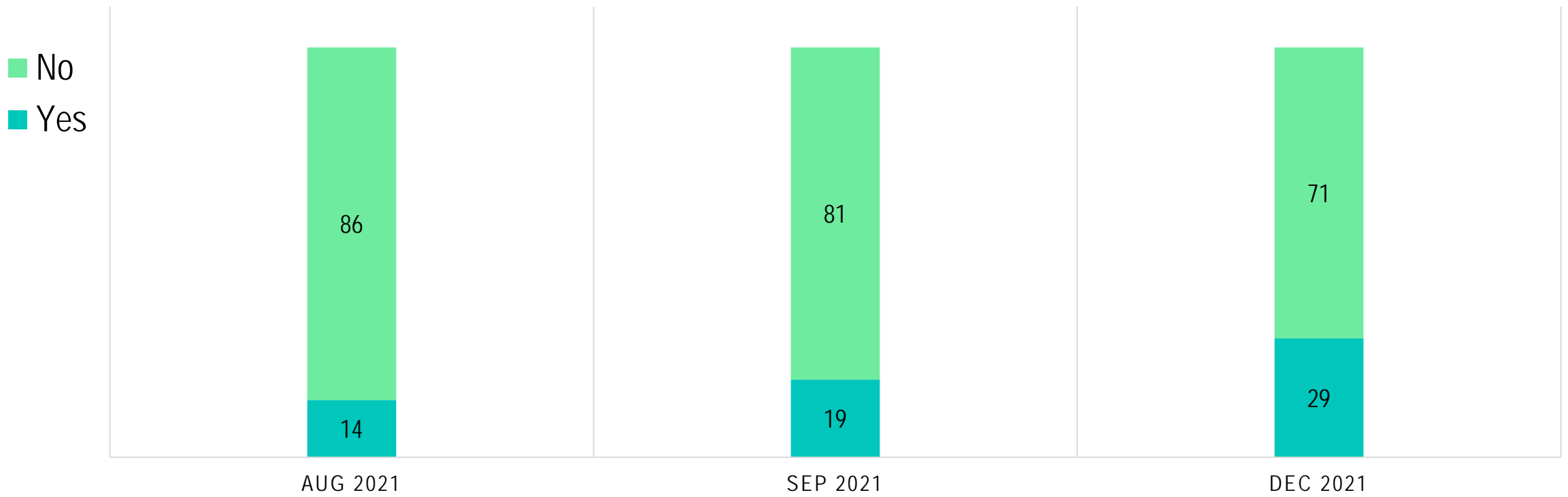
# STAFF

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

PERCENT

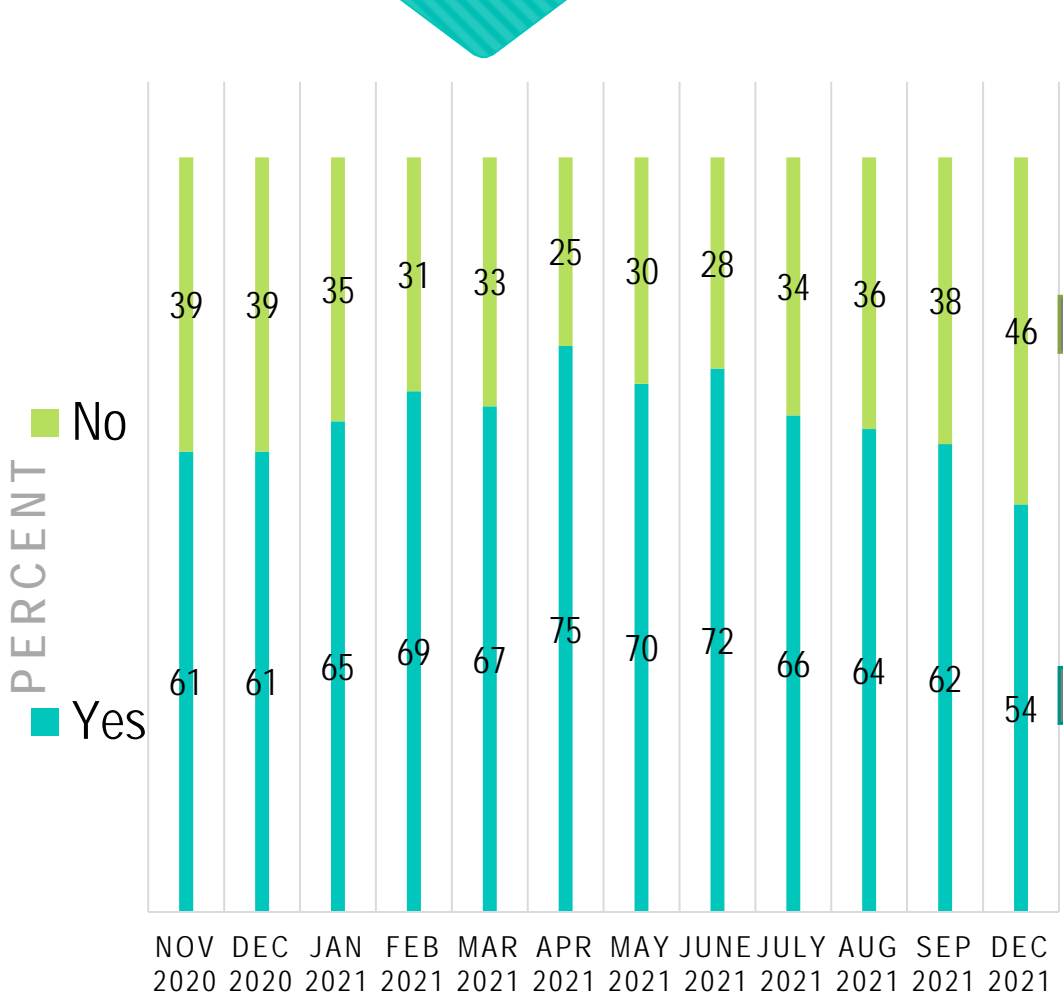


# HAS ANYONE WHO WORKS AT YOUR LOCATION GOTTEN COVID-19 AFTER BEING VACCINATED?



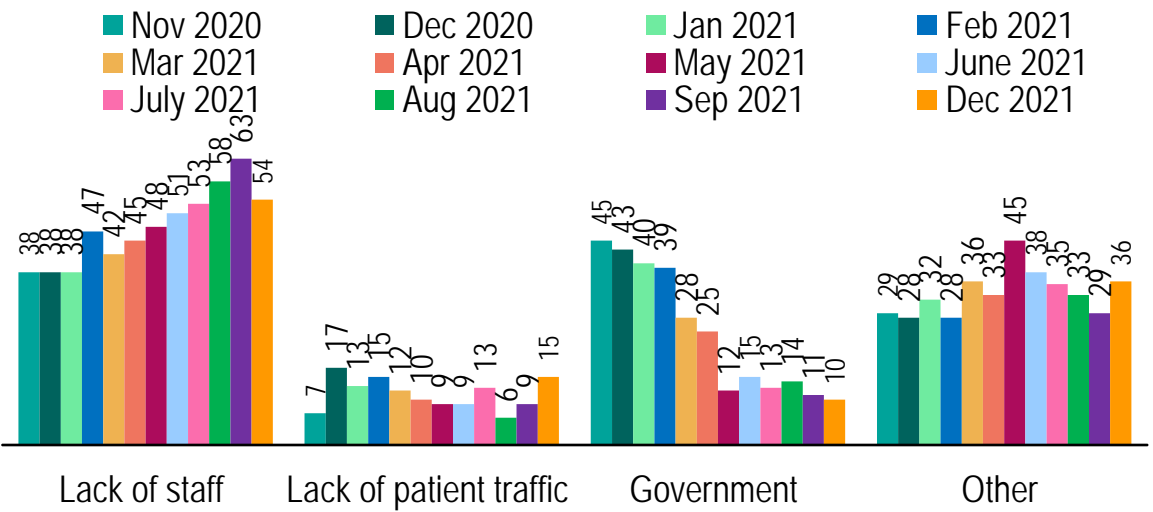
# PATIENT VOLUME

# 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: 33% more
- Average: 25% more
- Average: 29% 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	Sep 2021 vs Sep 2020	Sep 2021 vs Sep 2019	Year 2021 vs Year 2020	Year 2021 vs Year 2019
PROFITABILITY PER PATIENT	+18%	-5%	+39%	-2%	+29%	-2%	+19%	-1%	+30%	-1%	+10%	-1%	+11%	=	+12%	-1%
# PATIENTS PER DAY	+22%	-8%	+48%	-6%	+34%	-4%	+22%	-3%	+16%	-1%	+11%	-2%	+10%	-2%	+14%	-2%
REVENUE	+23%	-4%	+48%	-3%	+34%	-1%	+21%	-2%	+15%	=	+12%	-1%	+10%	=	+15%	+1%
OPTICAL SALES	+24%	-3%	+48%	-2%	+35%	=	+21%	-1%	+15%	+1%	+12%	=	+10%	=	+14%	+1%
CAPTURE RATE	+14%	=	+36%	=	+23%	+1%	+13%	=	+8%	+1%	+7%	-1%	+5%	+1%	+8%	+2%

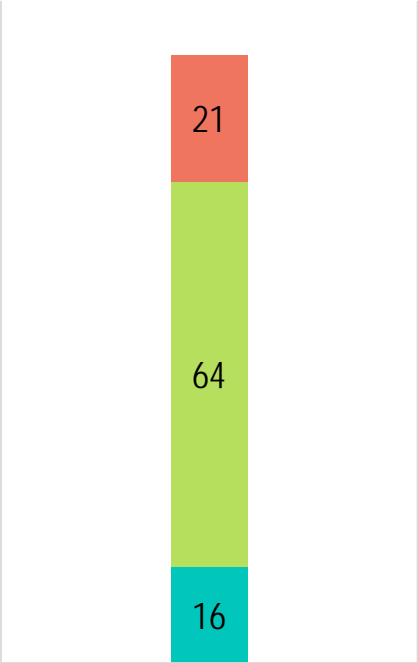


# THE FUTURE

# HAVE YOU MADE ANY LONG-TERM CHANGES TO THE FOLLOWING?

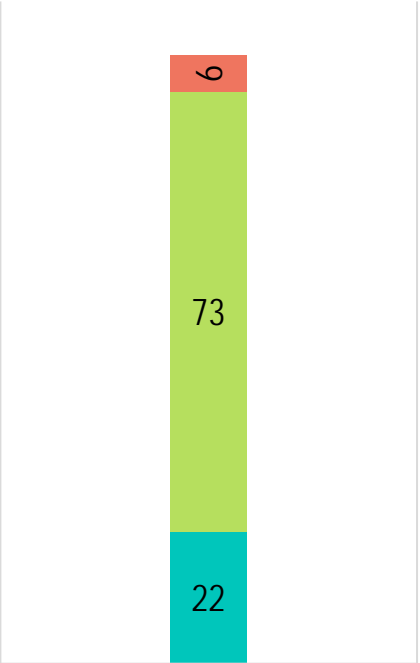
NUMBER OF STAFF

- More
- Same
- Less



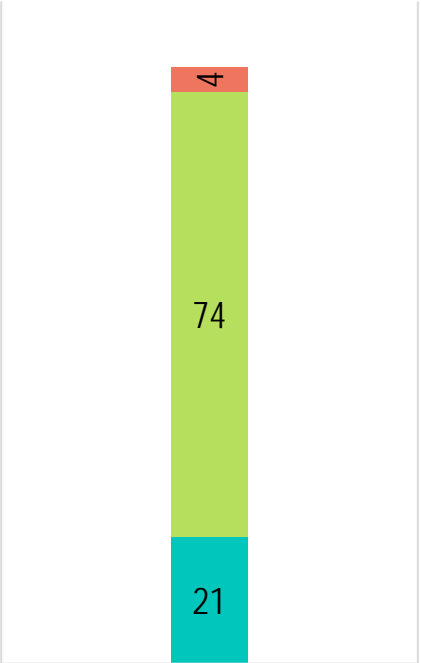
DEC 2021

WEEKEND HOURS



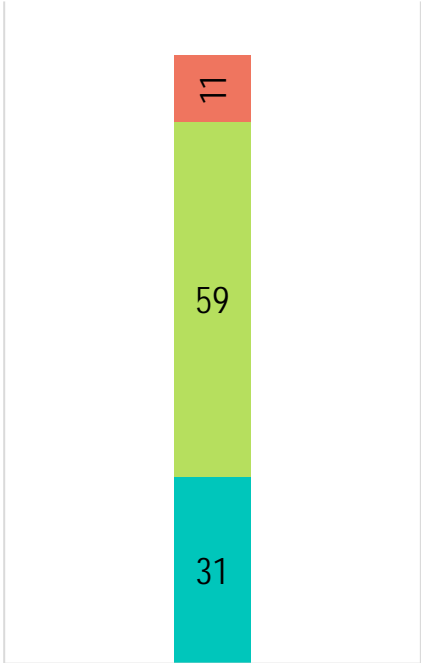
DEC 2021

EVENING HOURS



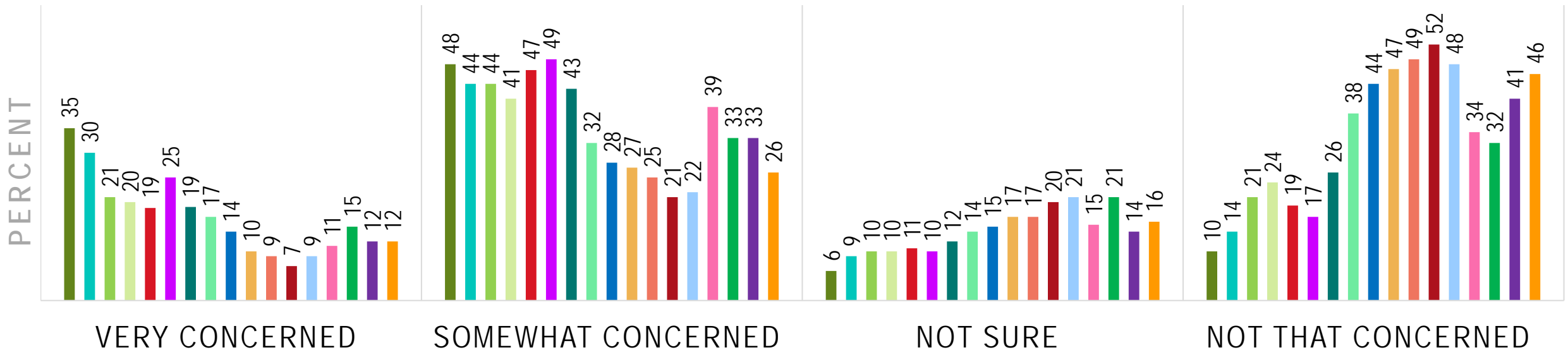
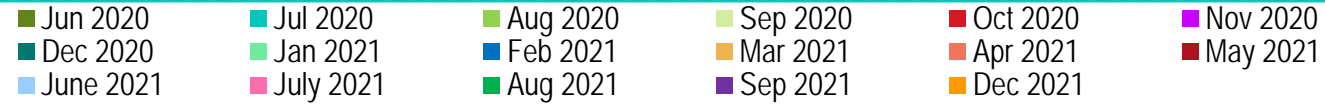
DEC 2021

PATIENTS SCHEDULED PER HOUR



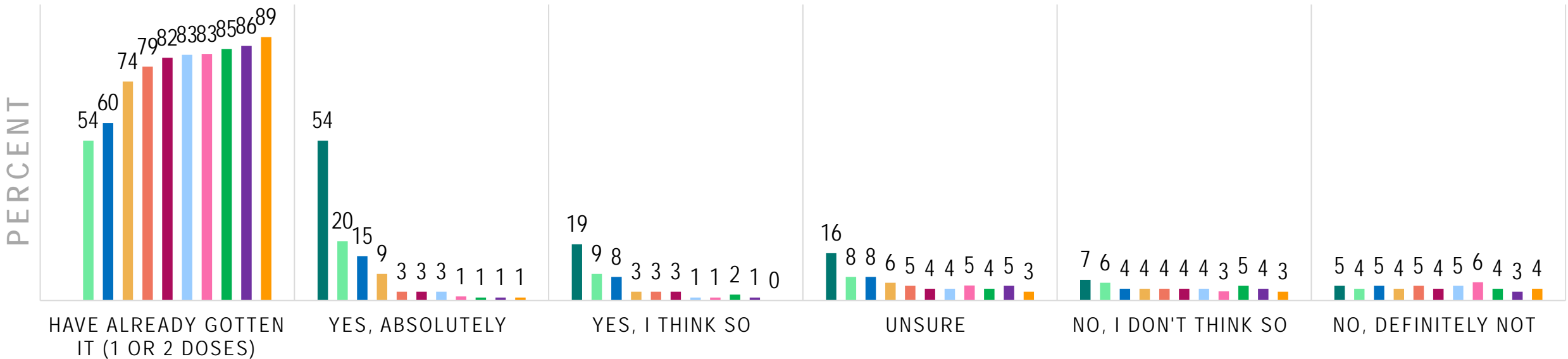
DEC 2021

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



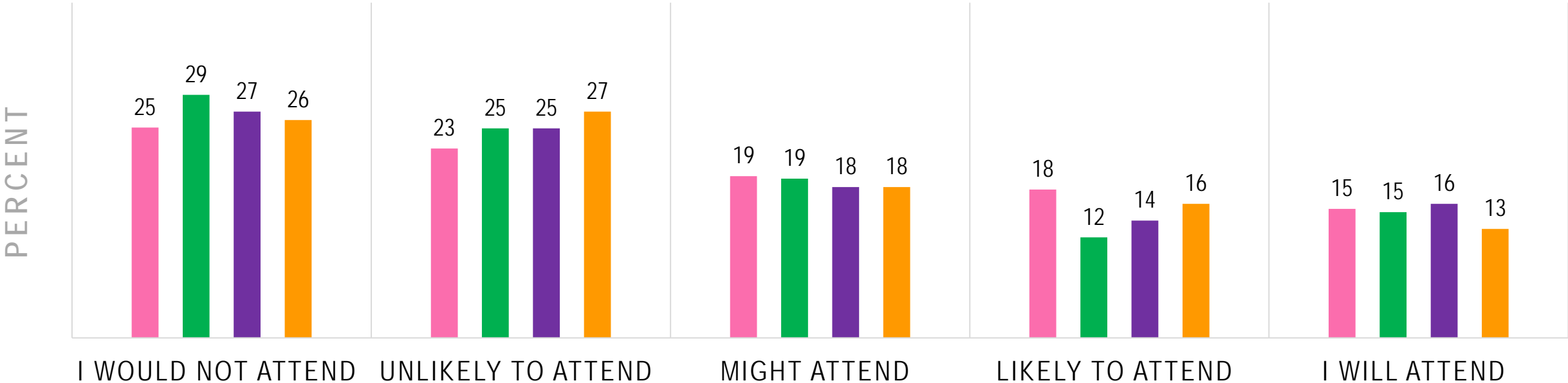
# THE VACCINE

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



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

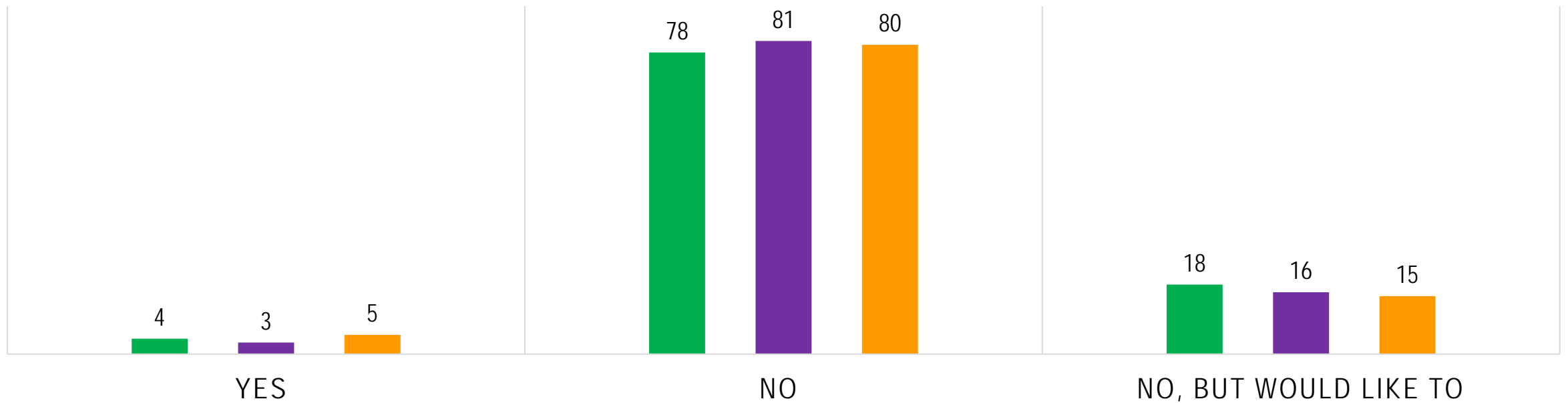
July 2021 Aug 2021 Sep 2021 Dec 2021



# 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 ■ Sep 2021 ■ Dec 2021

PERCENT



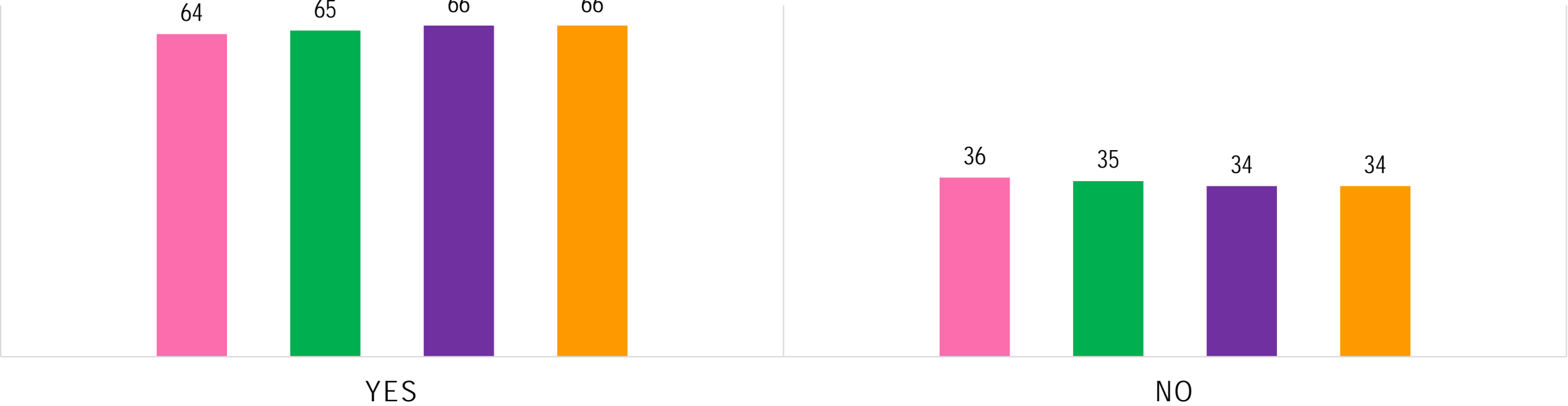
# SUPPLY CHAIN



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

July 2021 Aug 2021 Sep 2021 Dec 2021

PERCENT



If currently experiencing delays/supply chain issues:

# IN WHICH PRODUCT AREAS?

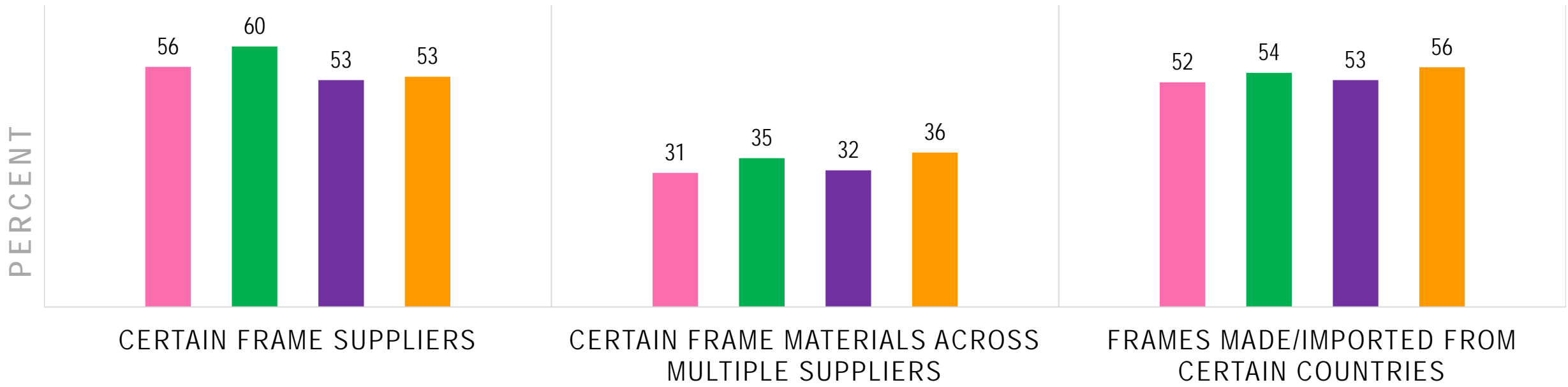
■ July 2021 ■ Aug 2021 ■ Sep 2021 ■ Dec 2021



If currently experiencing delays/supply chain issues with frames:

# WHERE HAVE YOU NOTICED THIS WITH FRAMES?

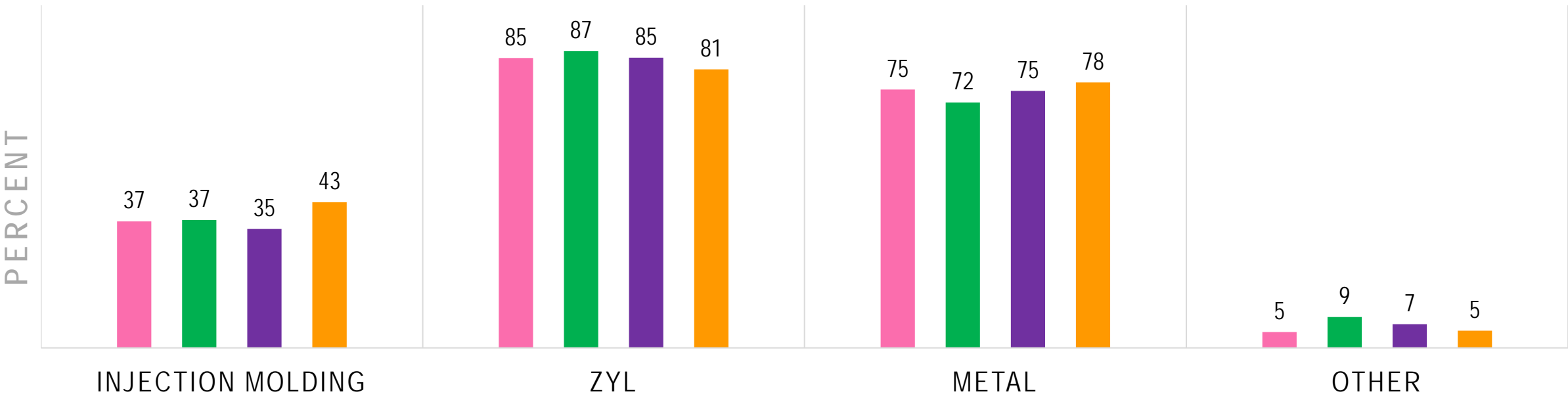
July 2021   Aug 2021   Sep 2021   Dec 2021



If currently experiencing delays/supply chain issues with frames:

# WHICH FRAME MATERIALS?

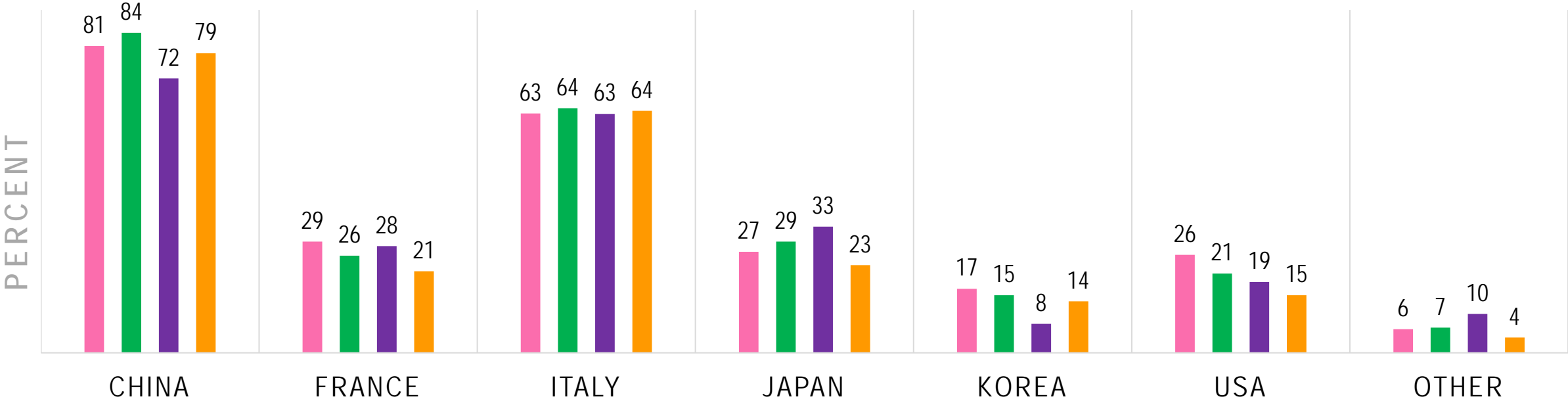
July 2021   Aug 2021   Sep 2021   Dec 2021



If currently experiencing delays/supply chain issues with frames:

# WHICH COUNTRIES?

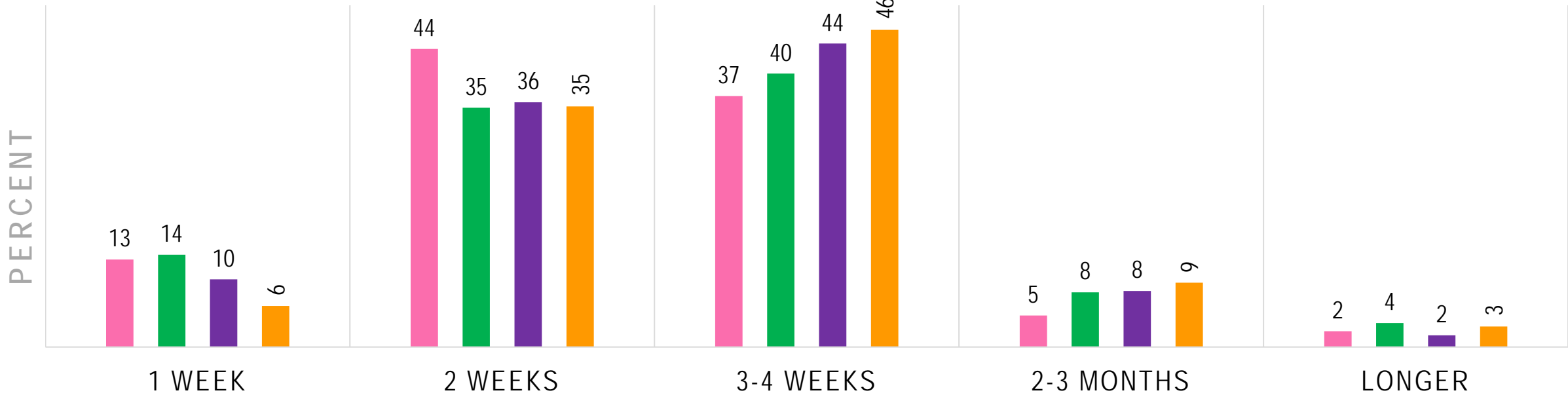
July 2021   Aug 2021   Sep 2021   Dec 2021



If currently experiencing delays/supply chain issues:

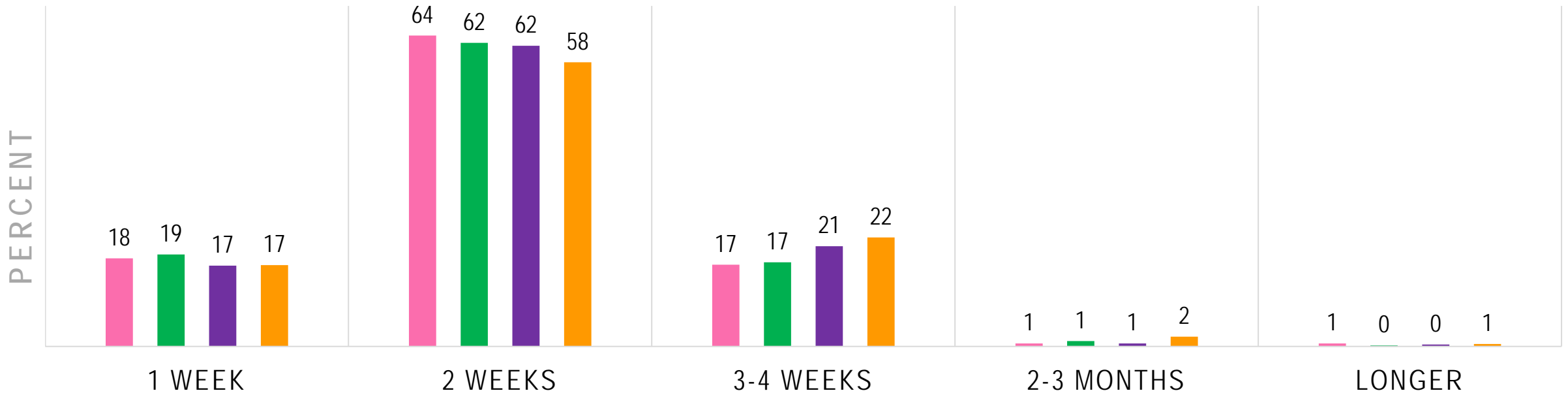
# APPROXIMATELY HOW LONG ARE THE DELAYS?

July 2021   Aug 2021   Sep 2021   Dec 2021



# HOW MUCH TIME DO YOU THINK MOST OF YOUR PATIENTS ARE WILLING TO WAIT FOR A PAIR OF FRAMES THEY CHOOSE?

July 2021   Aug 2021   Sep 2021   Dec 2021



# WHICH STATEMENTS DO YOU AGREE WITH?

■ July 2021 ■ Aug 2021 ■ Sep 2021 ■ Dec 2021

