

CORONAVIRUS ECP STUDY

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

R E S E A R C H

Wave 29

Mar 2022

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.

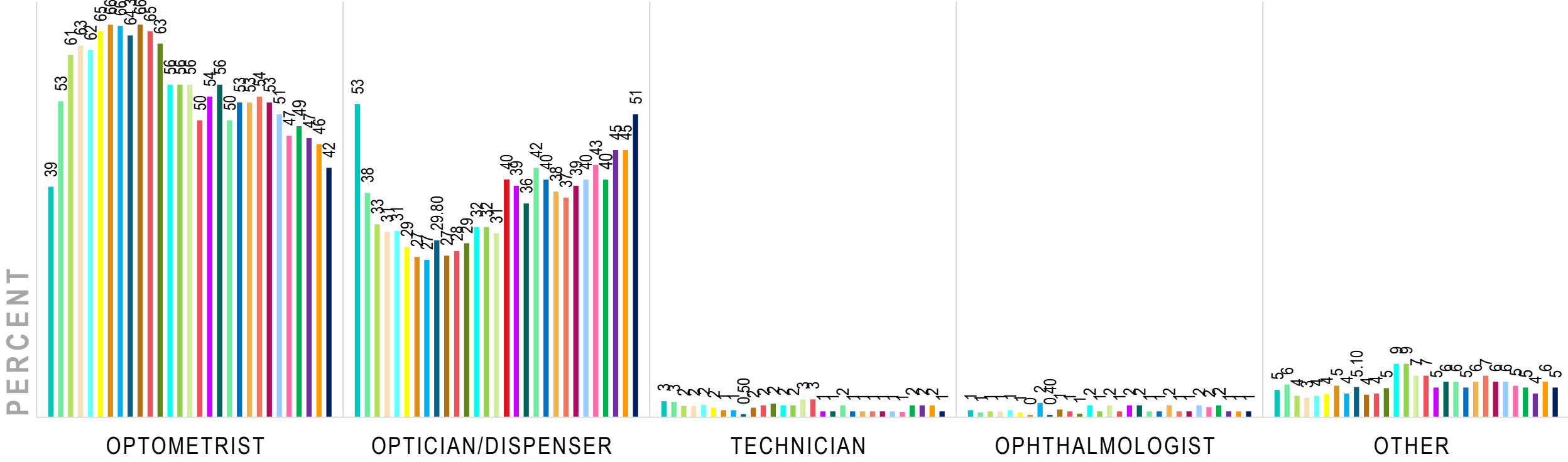
Comparisons are shown wherever possible.

- 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 Aug13-16, 2021. 458 completes.
- Wave 27 ran from Sep 27-30, 2021. 530 completes.
- Wave 28 ran from Dec 8-31, 2021. 564 completes.
- Wave 29 ran from Mar 4-7, 2022. 342 completes.

RESPONDENT DEMOGRAPHICS

RESPONDENT PROFESSION

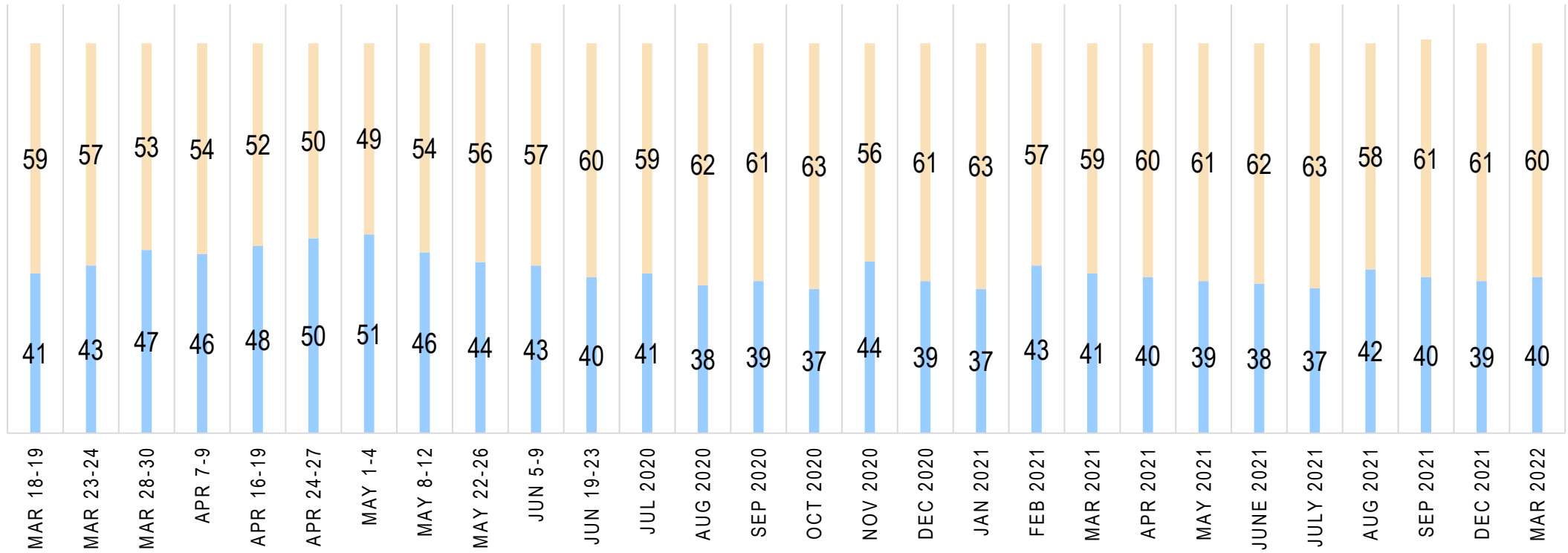
- Mar13-17
- Mar 18-19
- Mar 23-24
- Mar 28-30
- Apr 7-9
- Apr 16-19
- Apr 24-27
- May 1-4
- May 8-12
- May 22-26
- Jun 5-9
- Jun 19-23
- Jul 2020
- Aug 2020
- Sep 2020
- Oct 2020
- Nov 2020
- Dec 2020
- Jan 2021
- Feb 2021
- Mar 2021
- Apr 2021
- May 2021
- June 2021
- July 2021
- Aug 2021
- Sep 2021
- Dec 2021
- Mar 2022



GENDER

Female

Male



LOCATION TYPE

Dec 2020
Jun 2021

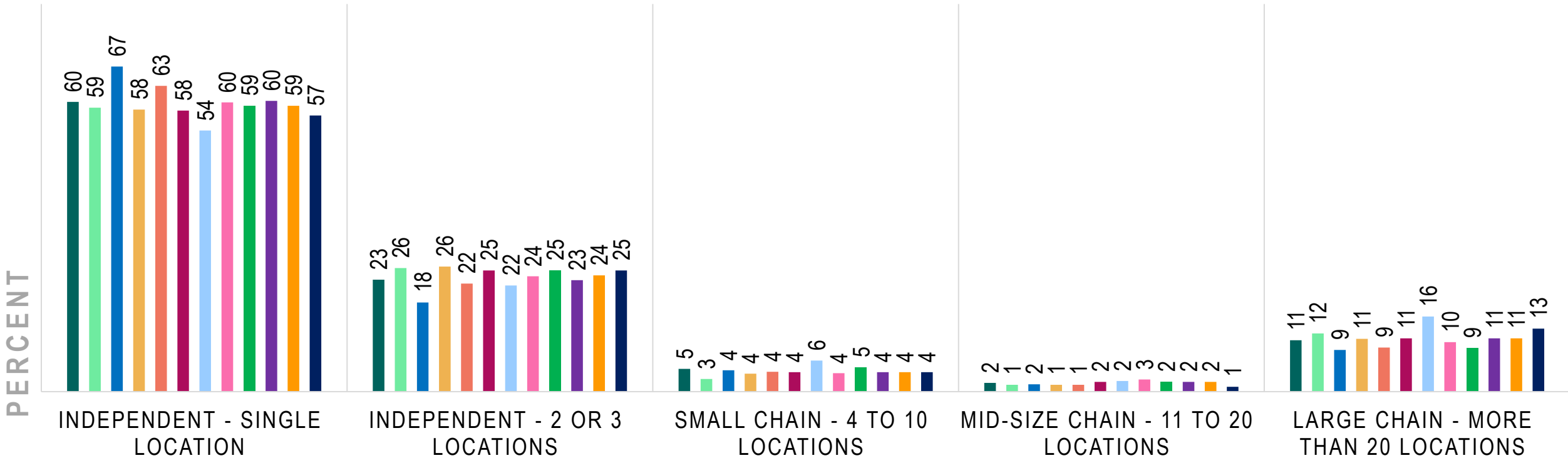
Jan 2021
July 2021

Feb 2021
Aug 2021

Mar 2021
Sep 2021

Apr 2021
Dec 2021

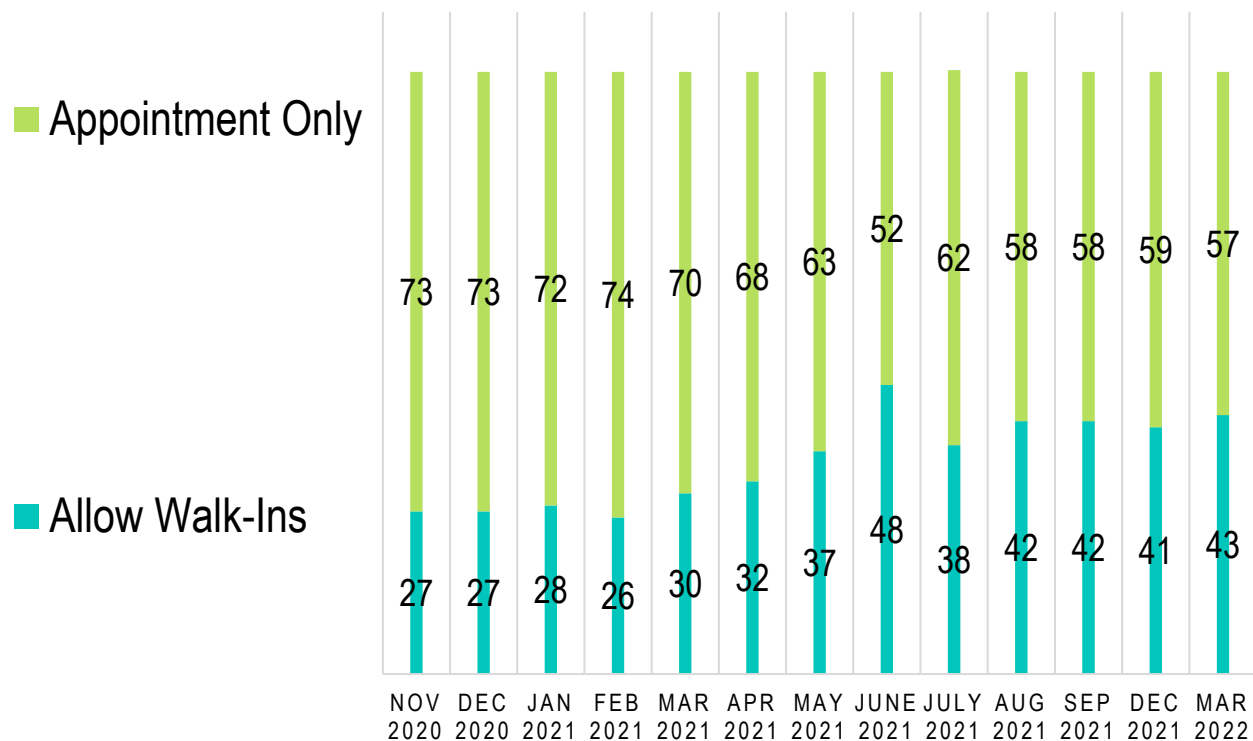
May 2021
Mar 2022



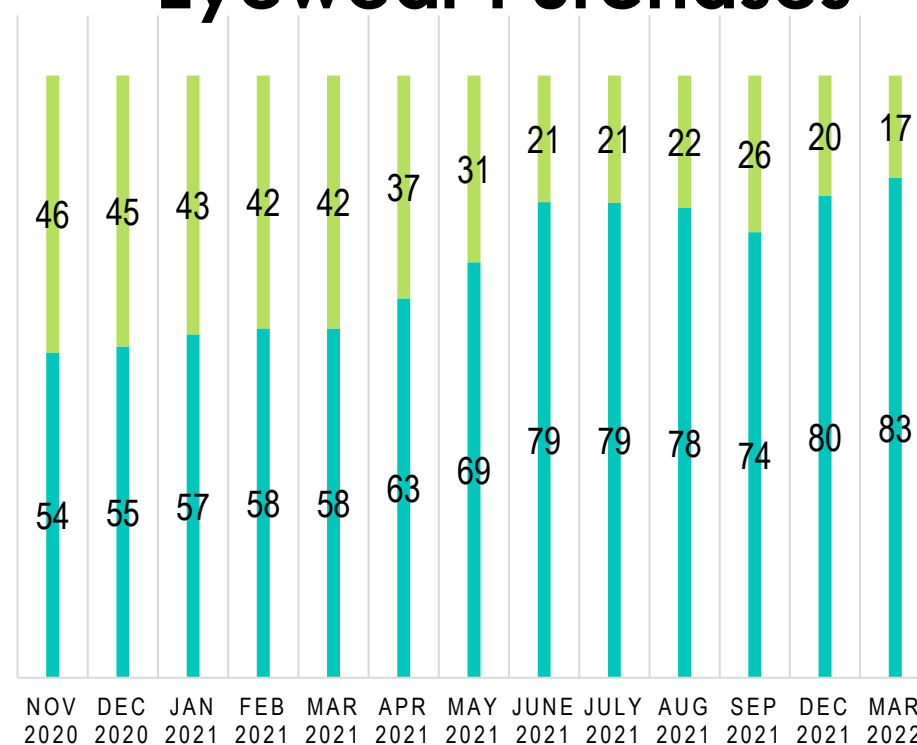
ECPS & THEIR PRACTICES

WALK-INS VS. APPOINTMENTS

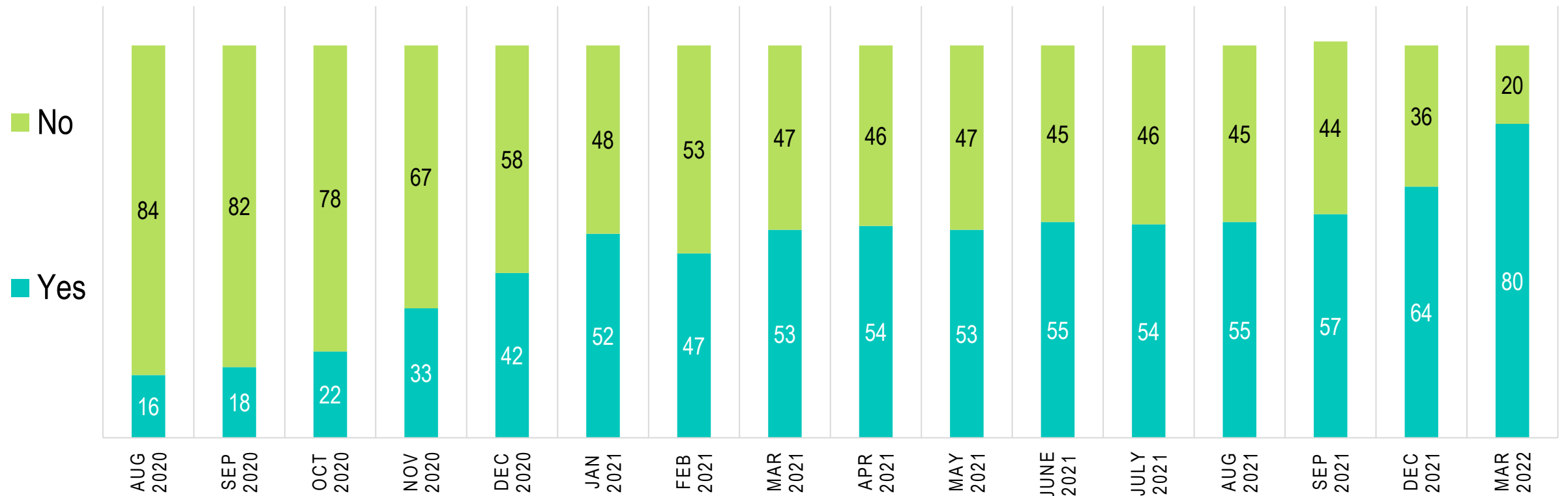
For Eye Exams



For Dispensing/ Eyewear Purchases



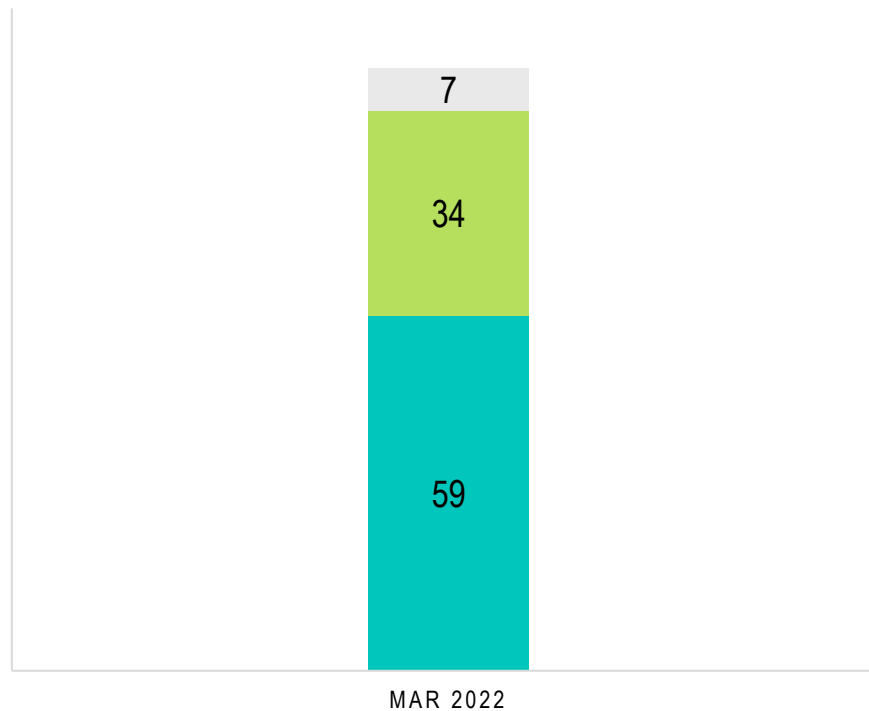
HAS ANYONE WHO WORKS AT YOUR LOCATION GOTTEN COVID-19?



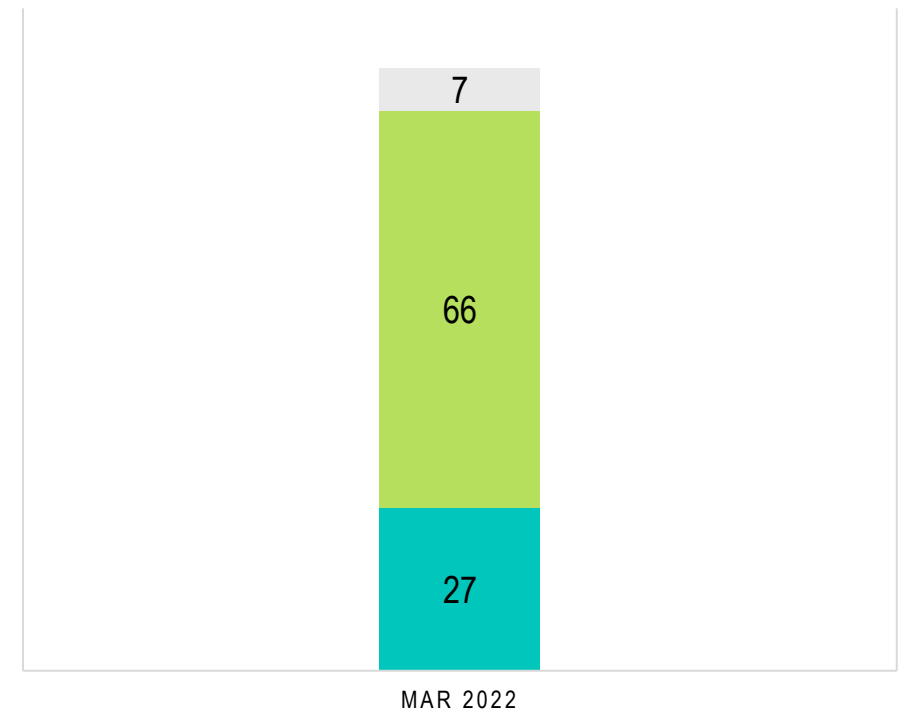
ARE MASKS CURRENTLY REQUIRED BY GOVERNMENT IN YOUR AREA?

For Medical Offices/Facilities

- Unsure
- No
- Yes



For Retail Locations

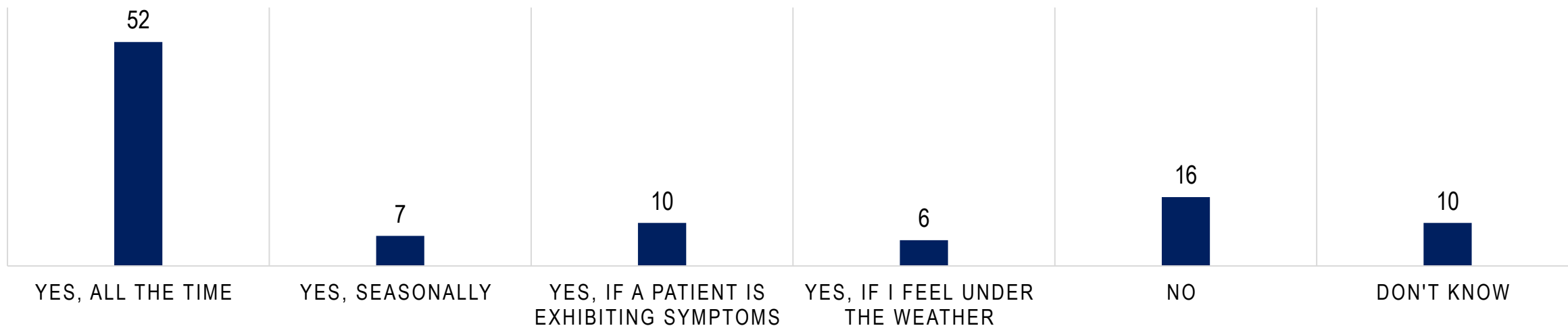


ARE YOU LIKELY TO CONTINUE TO WEAR A MASK YOURSELF IN THE EXAM ROOM WHEN YOU SEE PATIENTS IF/WHEN GOVERNMENT REQUIREMENTS ARE LIFTED?

Select one.

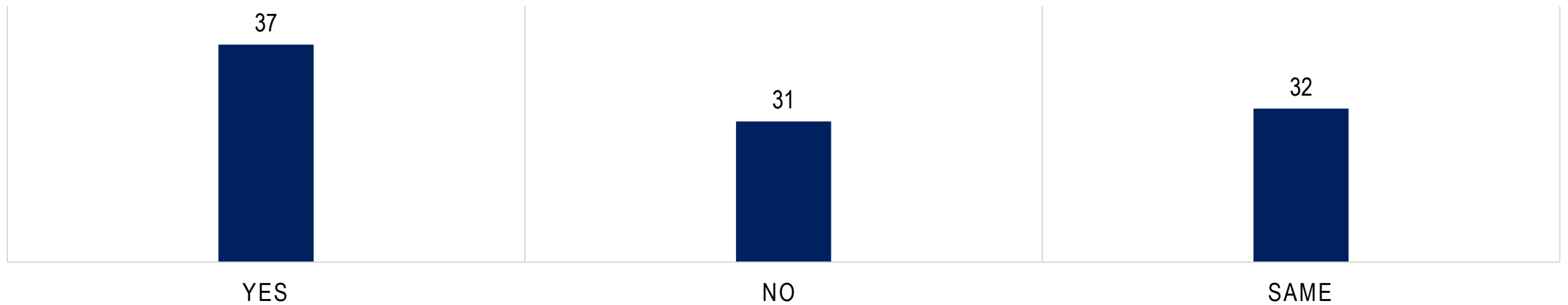
■ Mar 2022

PERCENT



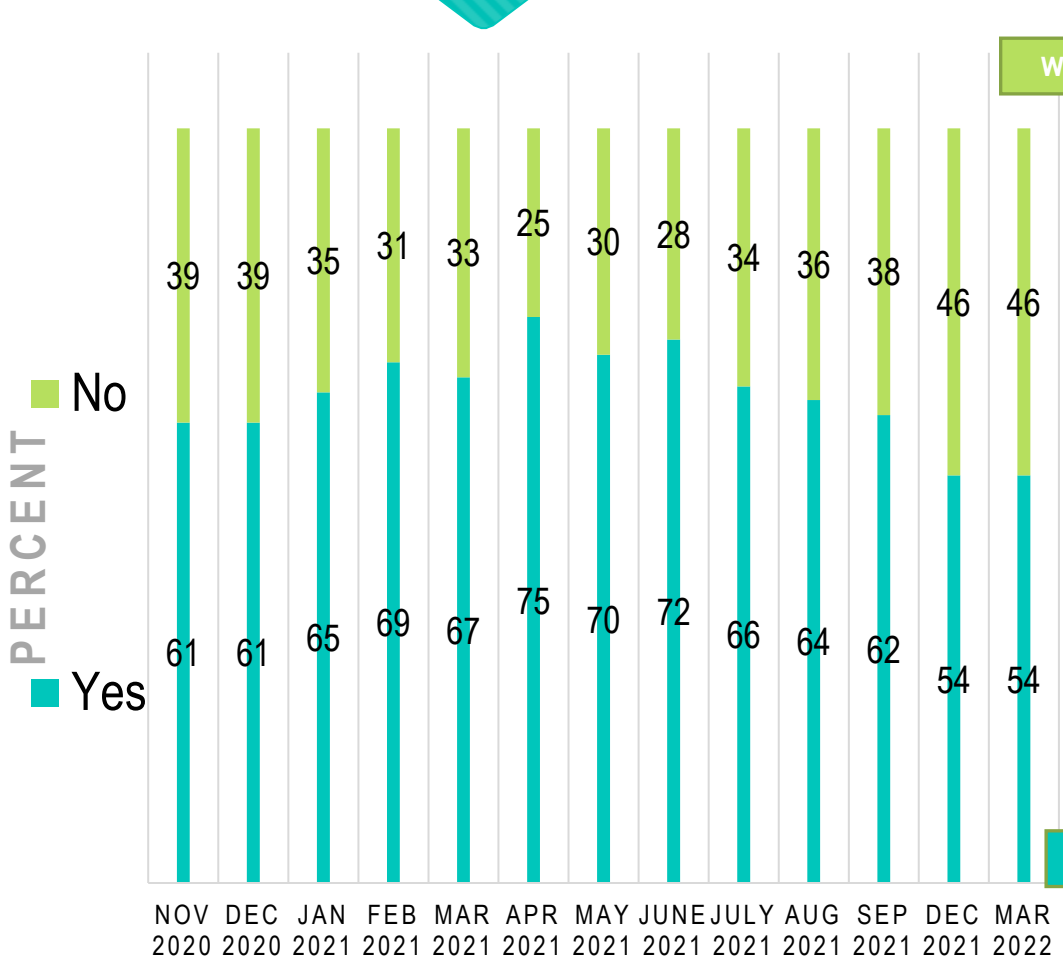
HAS YOUR PRACTICE UTILIZED YOUR SUPPLIERS' B2B SITES MORE DURING 2021/2022 TO ORDER NEW PRODUCTS OR REORDER PRODUCTS?

■ Mar 2022

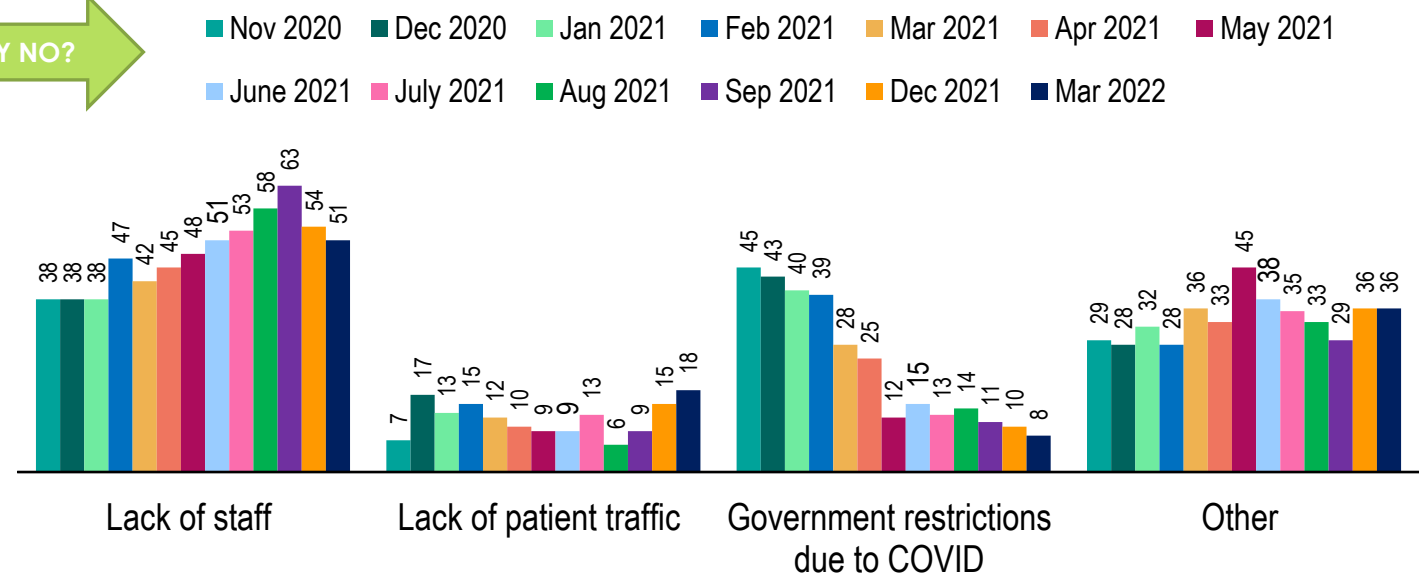


PATIENT VOLUME

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



WHY NO?



WHAT % MORE?

Month	Year	% More
DEC	2020	31%
JAN	2021	32%
FEB	2021	30%
MAR	2021	29%
APR	2021	26%
MAY	2021	30%
JUNE	2021	26%
JULY	2021	26%
AUG	2021	33%
SEP	2021	25%
DEC	2021	29%
MAR	2022	30%

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	FEB 2022 vs FEB 2021	FEB 2022 vs FEB 2019
PROFITABILITY PER PATIENT	+18%	-5%	+39%	-2%	+29%	-2%	+19%	-1%	+30%	-1%	+10%	-1%	+11%	=	+12%	-1%	+7%	+2%
# PATIENTS PER DAY	+22%	-8%	+48%	-6%	+34%	-4%	+22%	-3%	+16%	-1%	+11%	-2%	+10%	-2%	+14%	-2%	+7%	+0%
REVENUE	+23%	-4%	+48%	-3%	+34%	-1%	+21%	-2%	+15%	=	+12%	-1%	+10%	=	+15%	+1%	+6%	+3%
OPTICAL SALES	+24%	-3%	+48%	-2%	+35%	=	+21%	-1%	+15%	+1%	+12%	=	+10%	=	+14%	+1%	+8%	+3%
CAPTURE RATE	+14%	=	+36%	=	+23%	+1%	+13%	=	+8%	+1%	+7%	-1%	+5%	+1%	+8%	+2%	+3%	+2%

TRADE SHOWS

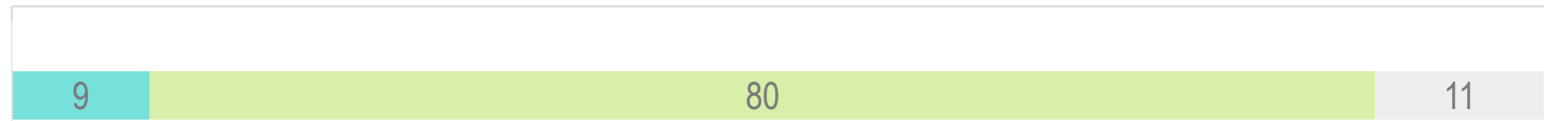
PLANNING TO ATTEND VISION EXPO EAST THIS YEAR?

Mar 2022

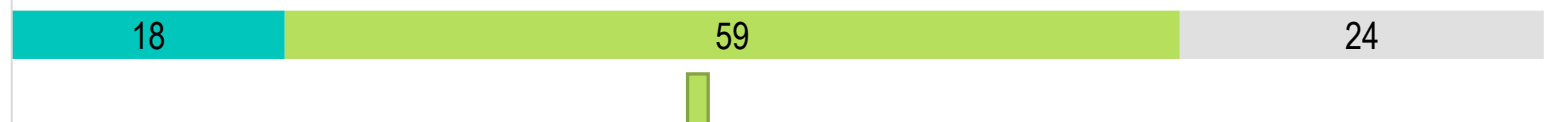
PERCENT

■ Yes ■ No ■ Unsure

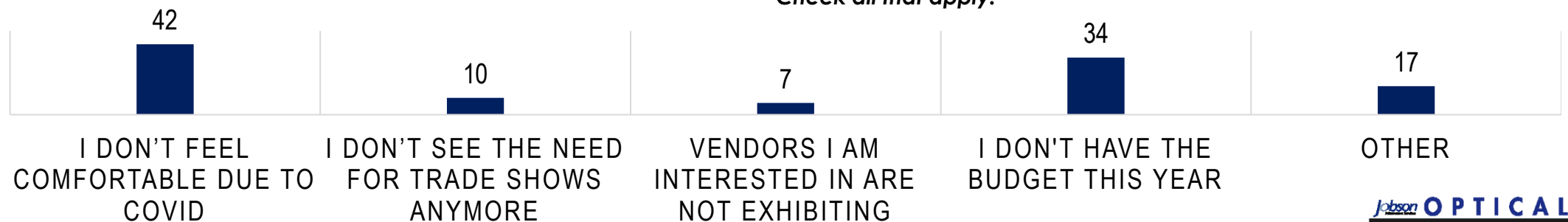
ALL ECPS



ECPS WHO NORMALLY ATTEND

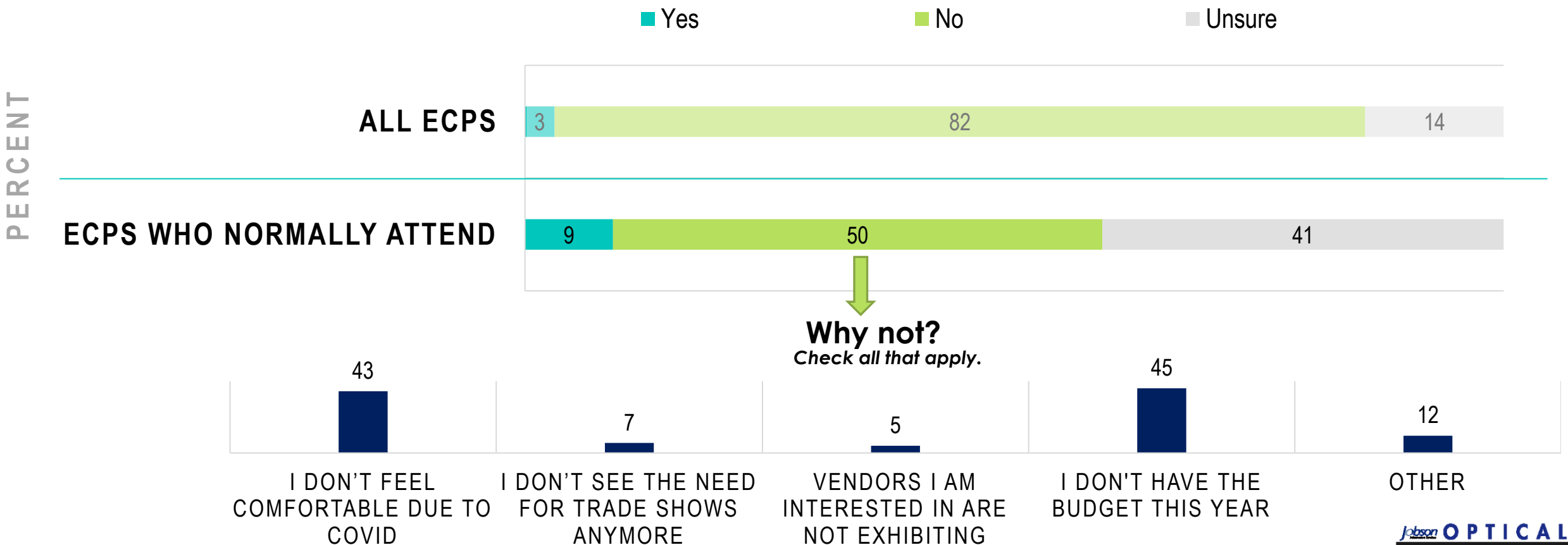


Why not?
Check all that apply.



PLANNING TO ATTEND SECO THIS YEAR?

Mar 2022

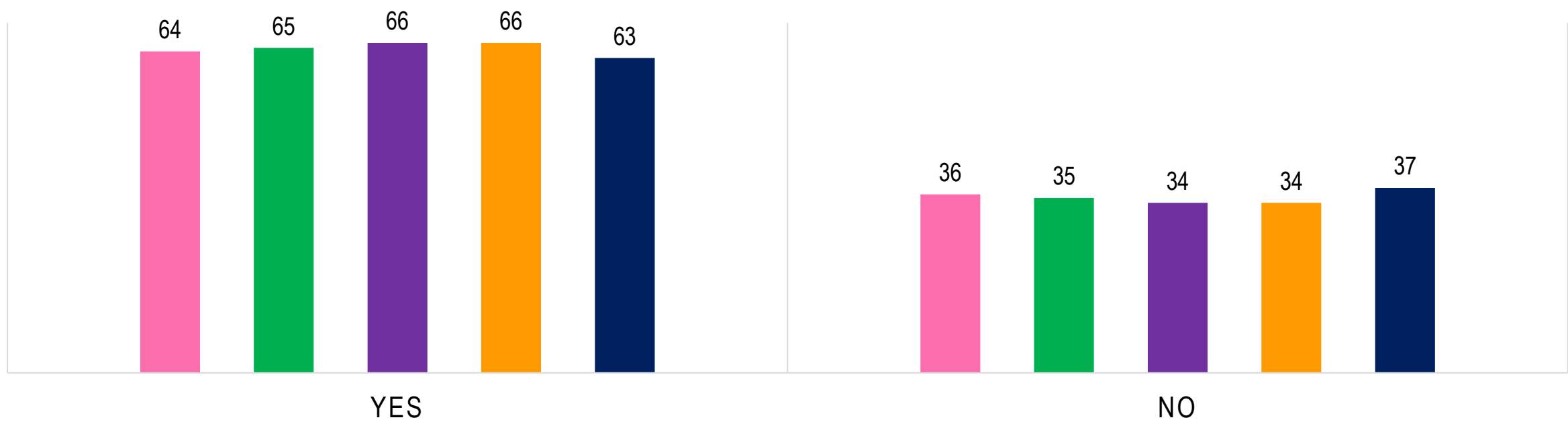


SUPPLY CHAIN

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 Mar 2022

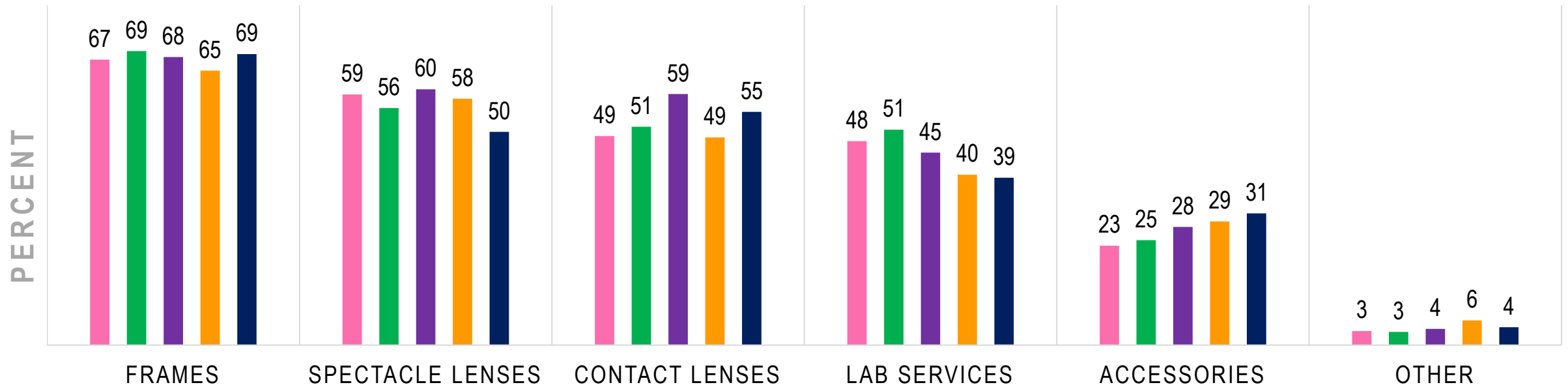
PERCENT



If currently experiencing delays/supply chain issues:

IN WHICH PRODUCT AREAS?

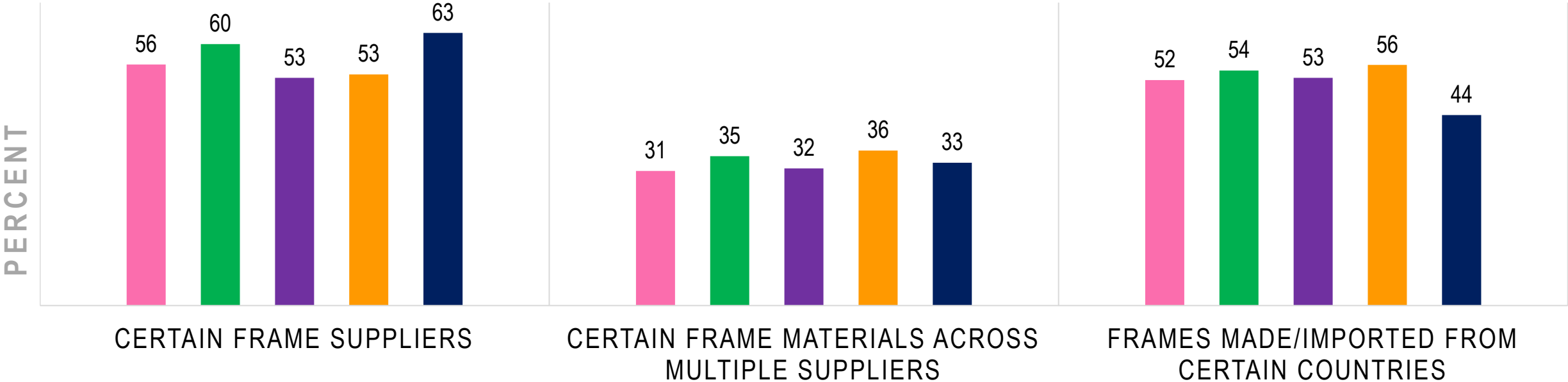
July 2021 Aug 2021 Sep 2021 Dec 2021 Mar 2022



If currently experiencing delays/supply chain issues with frames:

WHERE HAVE YOU NOTICED THIS WITH FRAMES?

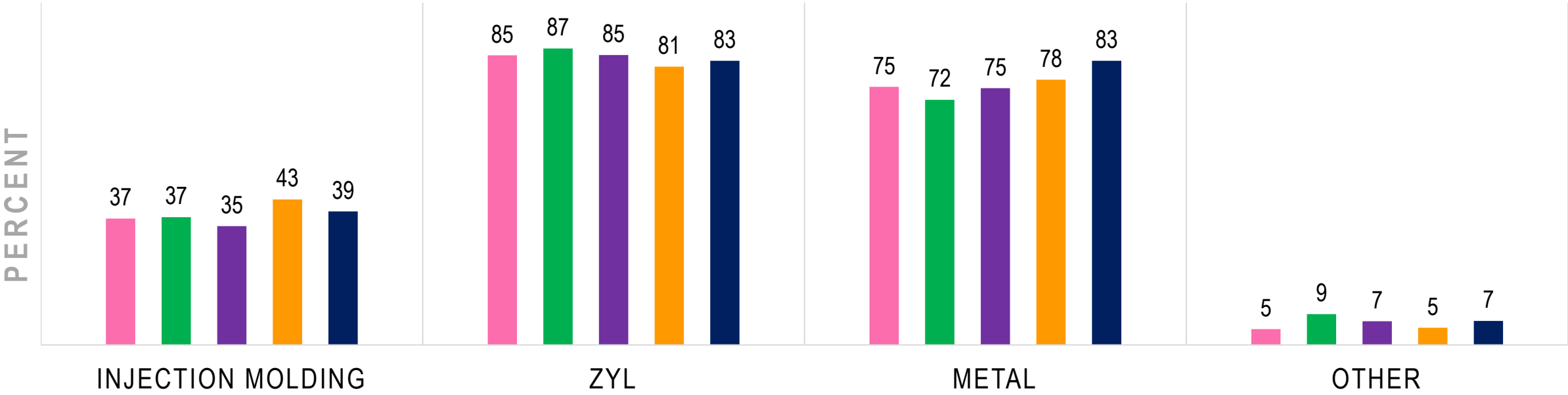
July 2021 Aug 2021 Sep 2021 Dec 2021 Mar 2022



If currently experiencing delays/supply chain issues with frames:

WHICH FRAME MATERIALS?

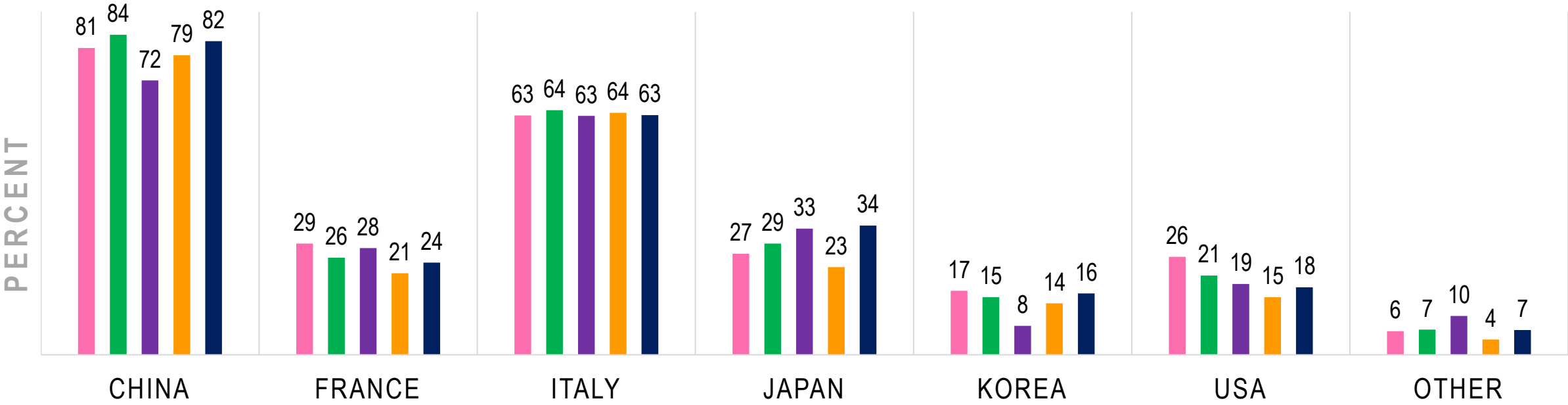
July 2021 Aug 2021 Sep 2021 Dec 2021 Mar 2022



If currently experiencing delays/supply chain issues with frames:

WHICH COUNTRIES?

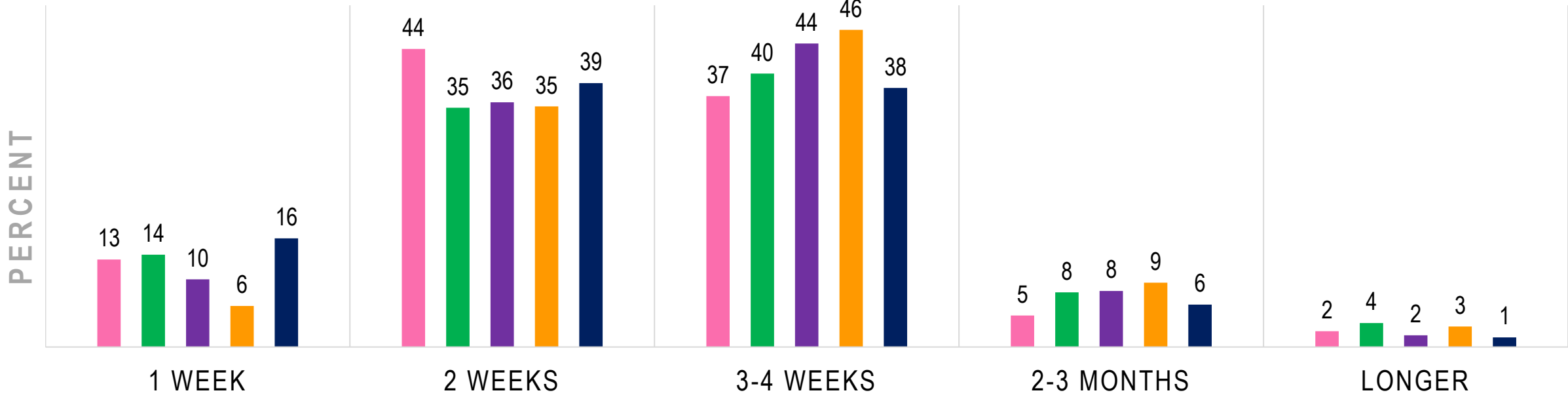
July 2021 Aug 2021 Sep 2021 Dec 2021 Mar 2022



If currently experiencing delays/supply chain issues:

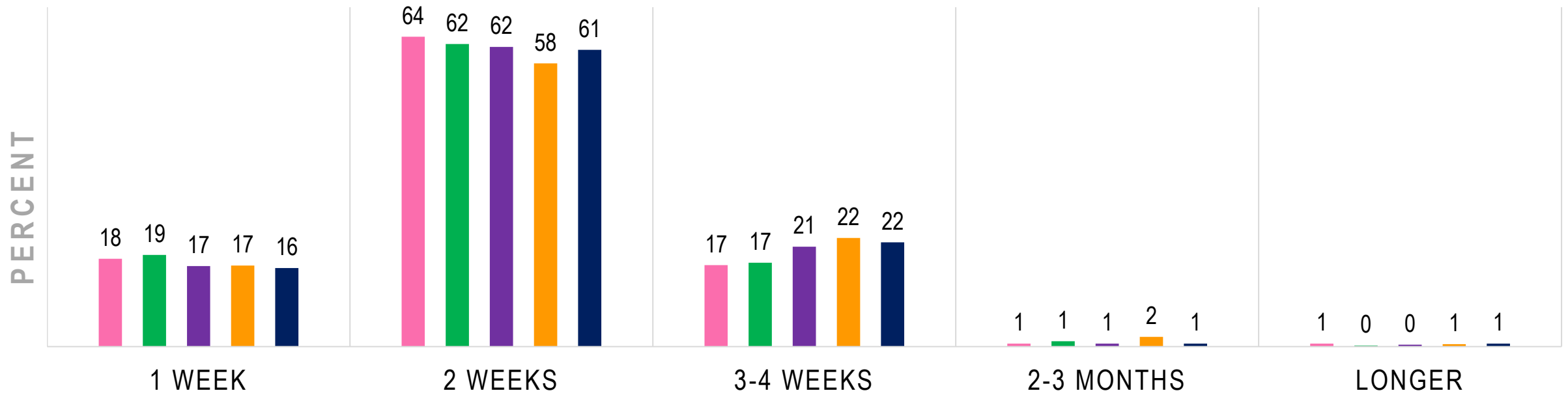
APPROXIMATELY HOW LONG ARE THE DELAYS?

July 2021 Aug 2021 Sep 2021 Dec 2021 Mar 2022



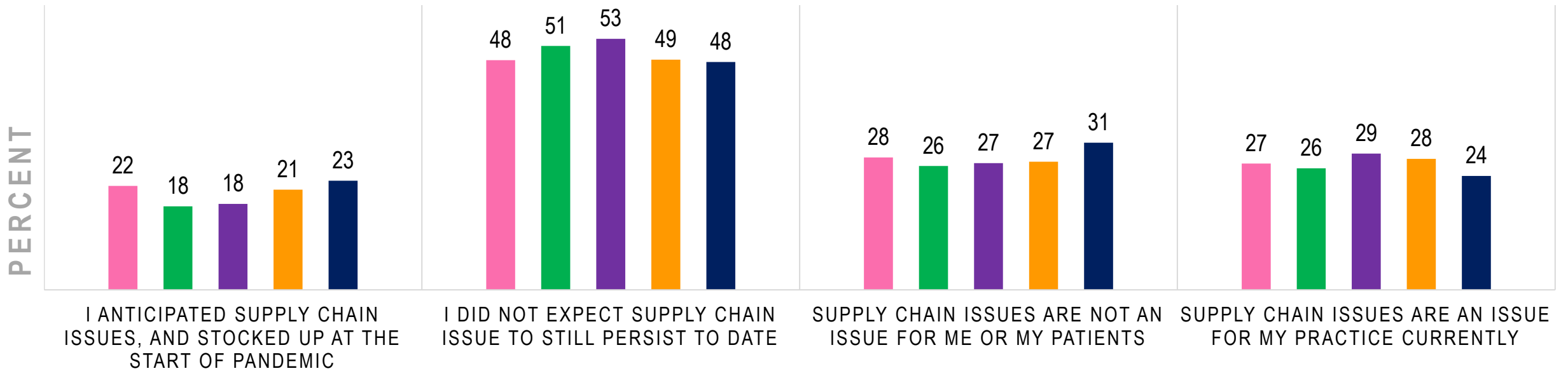
HOW MUCH TIME DO YOU THINK MOST OF YOUR PATIENTS ARE WILLING TO WAIT FOR A PAIR OF FRAMES THEY CHOOSE?

July 2021 Aug 2021 Sep 2021 Dec 2021 Mar 2022



WHICH STATEMENTS DO YOU AGREE WITH?

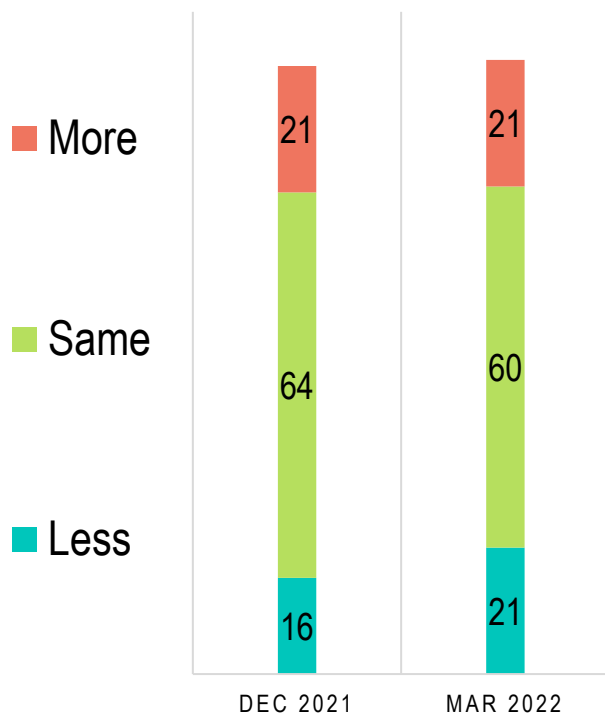
July 2021 Aug 2021 Sep 2021 Dec 2021 Mar 2022



THE FUTURE

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

NUMBER OF STAFF



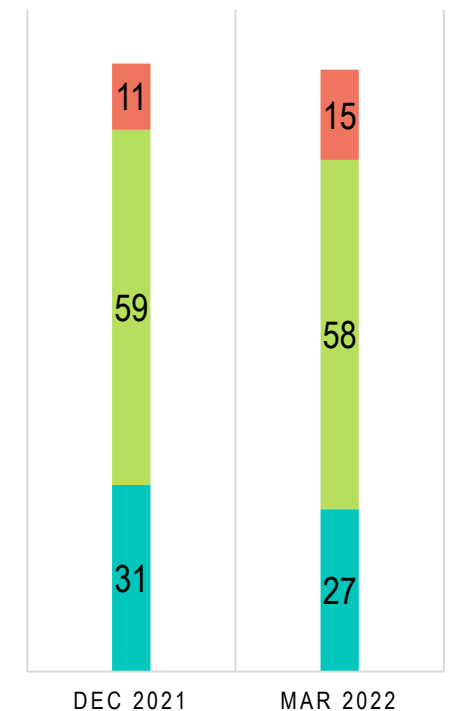
WEEKEND HOURS



EVENING HOURS



PATIENTS SCHEDULED PER HOUR



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 ■ Sep 2021 ■ Dec 2021 ■ Mar 2022

