

# CORONAVIRUS ECP STUDY

WAVE 11

June 5-9

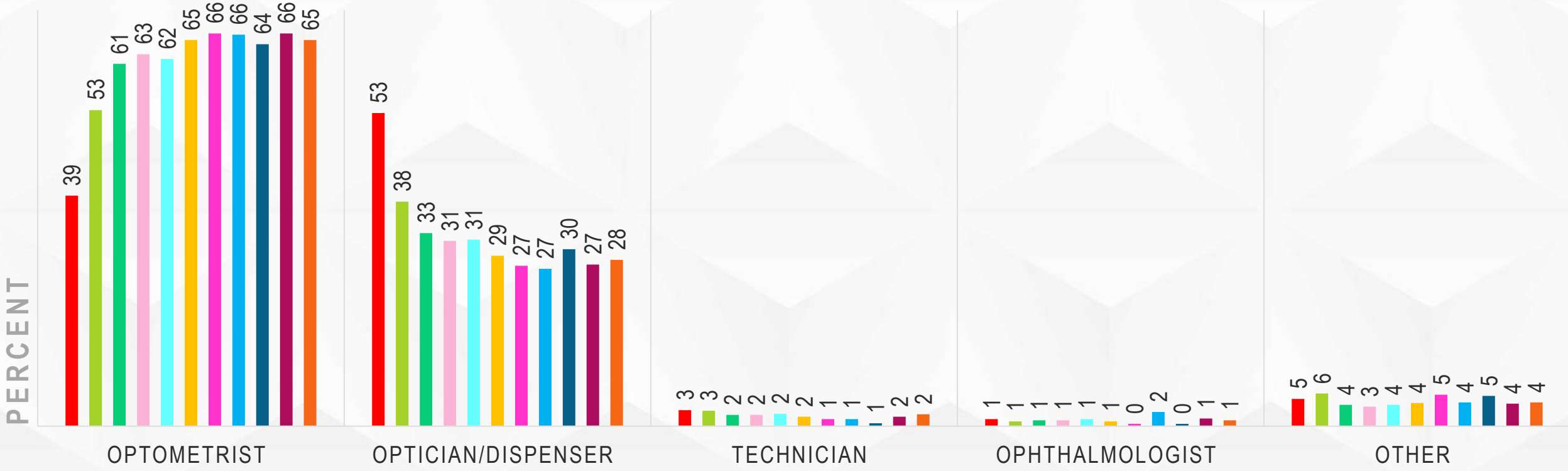


# RESPONDENTS

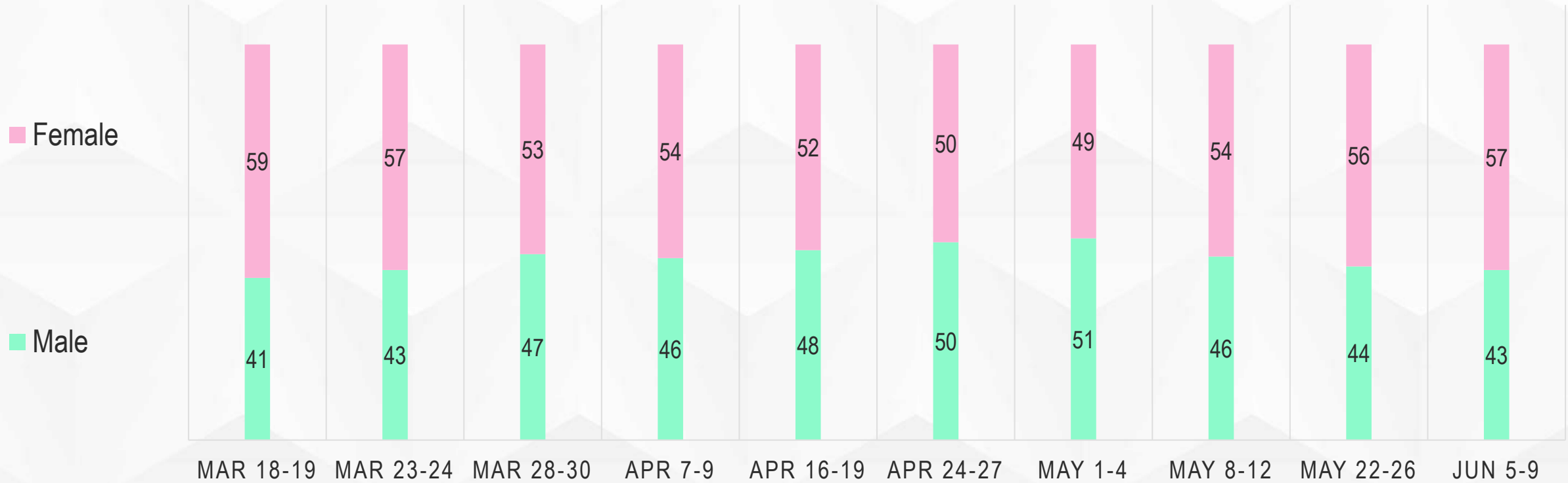
- This survey was asked in several waves.
  - Wave 1 ran from Mar 13-17. 583 completes.
  - Wave 2 ran from Mar 18-19. 1,341 completes.
  - Wave 3 ran from Mar 23-24. 1,285 completes
  - Wave 4 ran from Mar 28-30. 1,769 completes.
  - Wave 5 ran from Apr 7-9. 1,306 completes.
  - Wave 6 ran from Apr 16-19. 1,110 completes.
  - Wave 7 ran from Apr 24-27. 922 completes.
  - Wave 8 ran from May 1-4. 699 completes.
  - Wave 9 ran from May 8-12. 557 completes.
  - Wave 10 ran from May 22-26. 758 completes.
  - Wave 11 ran from Jun 5-9. 635 completes.
- Questions varied slightly in each wave
- Comparisons are shown wherever possible.

# RESPONDENT PROFESSION

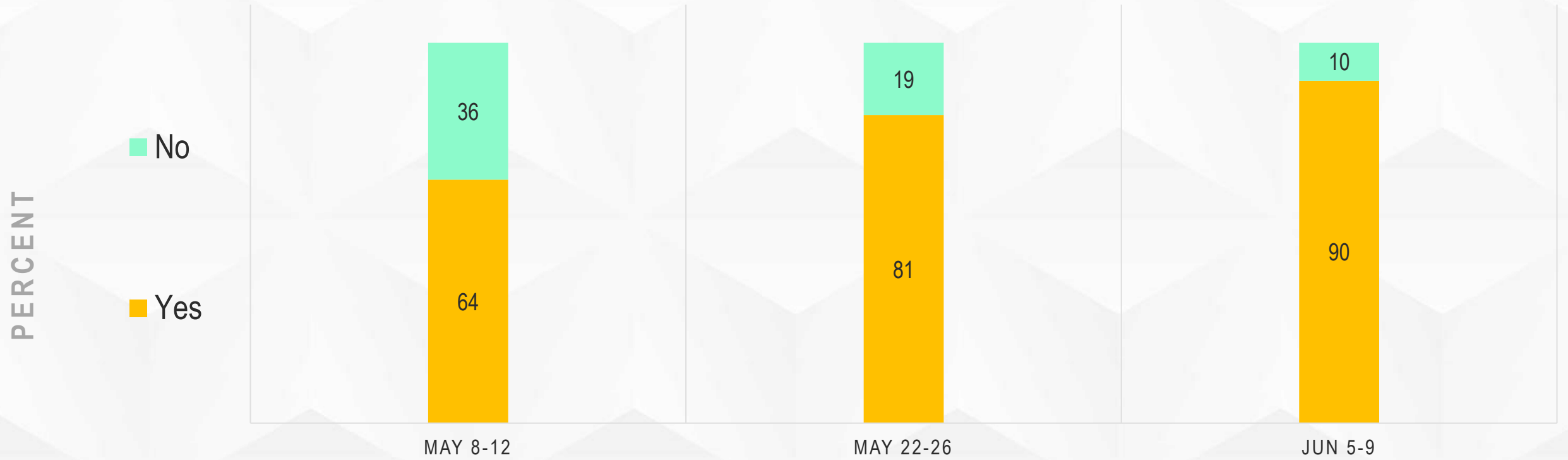
■ Mar13-17 
 ■ Mar 18-19 
 ■ Mar 23-24 
 ■ Mar 28-30 
 ■ Apr 7-9 
 ■ Apr 16-19 
 ■ Apr 24-27 
 ■ May 1-4 
 ■ May 8-12 
 ■ May 22-26 
 ■ Jun 5-9



# GENDER

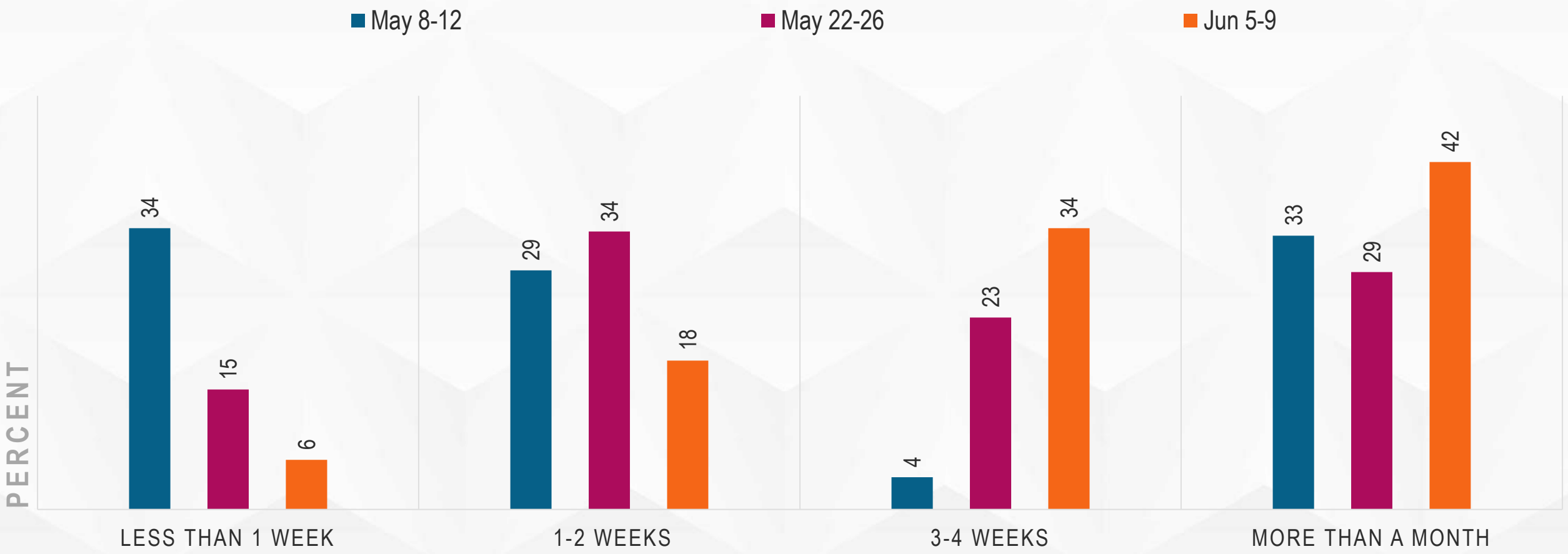


# LOCATION OPEN?



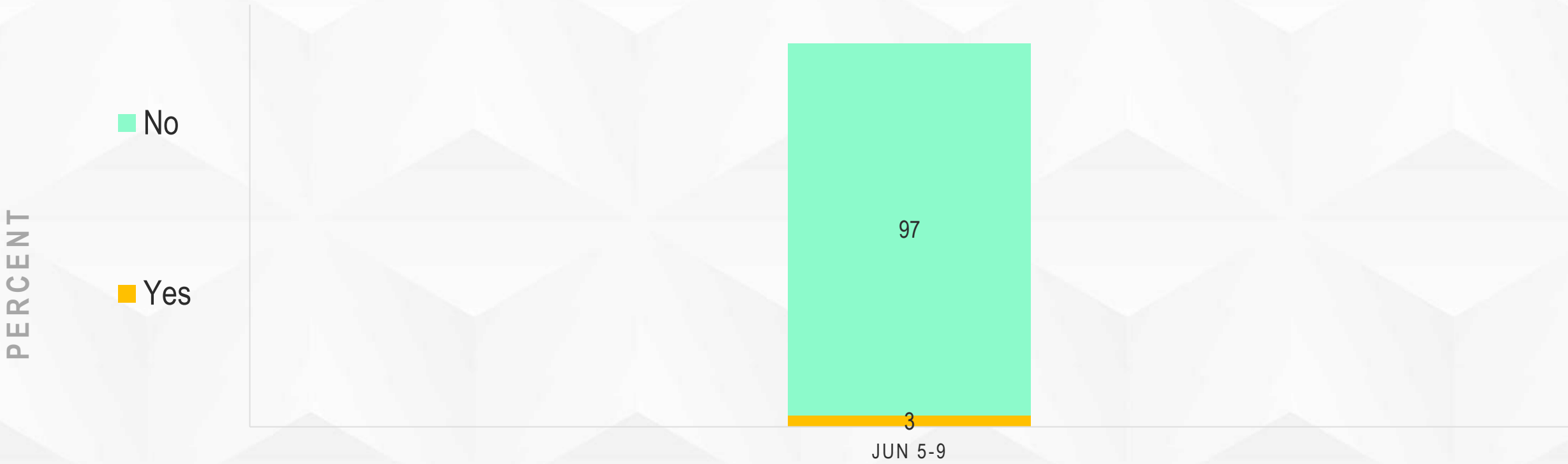
If open:

# HOW LONG HAVE YOU BEEN OPEN FOR?



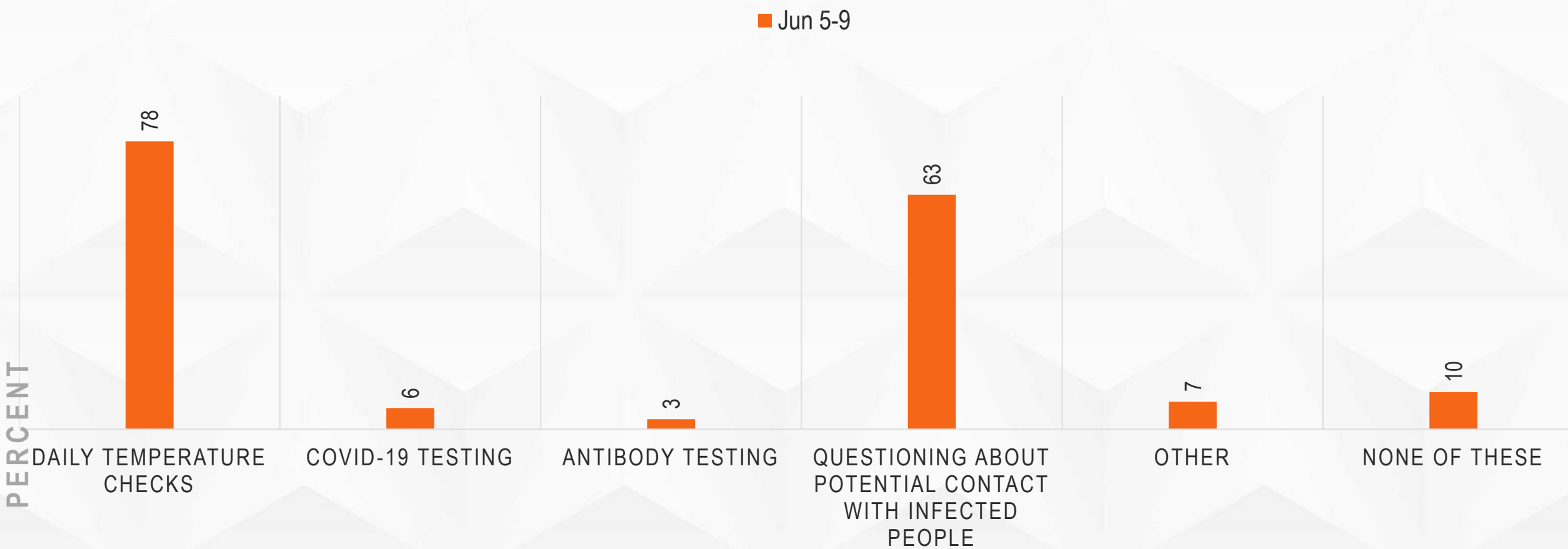
If open:

# SINCE BEING RE-OPEN HAS ANYONE THAT WORKS AT YOUR LOCATION GOTTEN COVID-19?



If open:

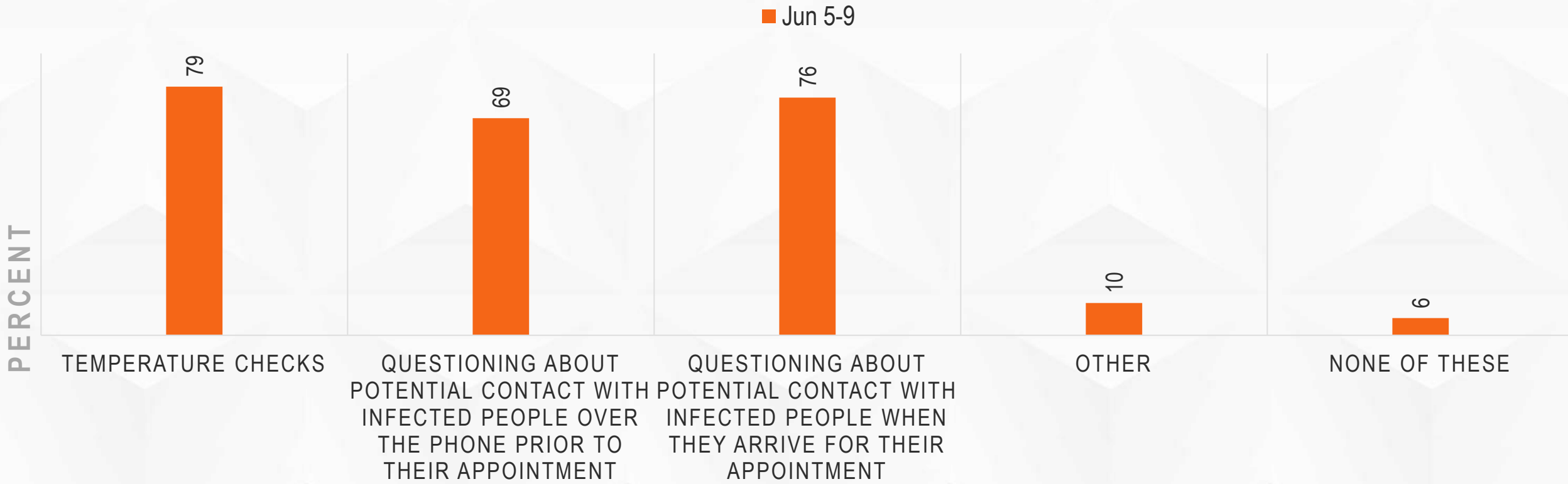
# HOW HAVE YOU SCREENED STAFF AT YOUR LOCATION FOR COVID-19?





If open:

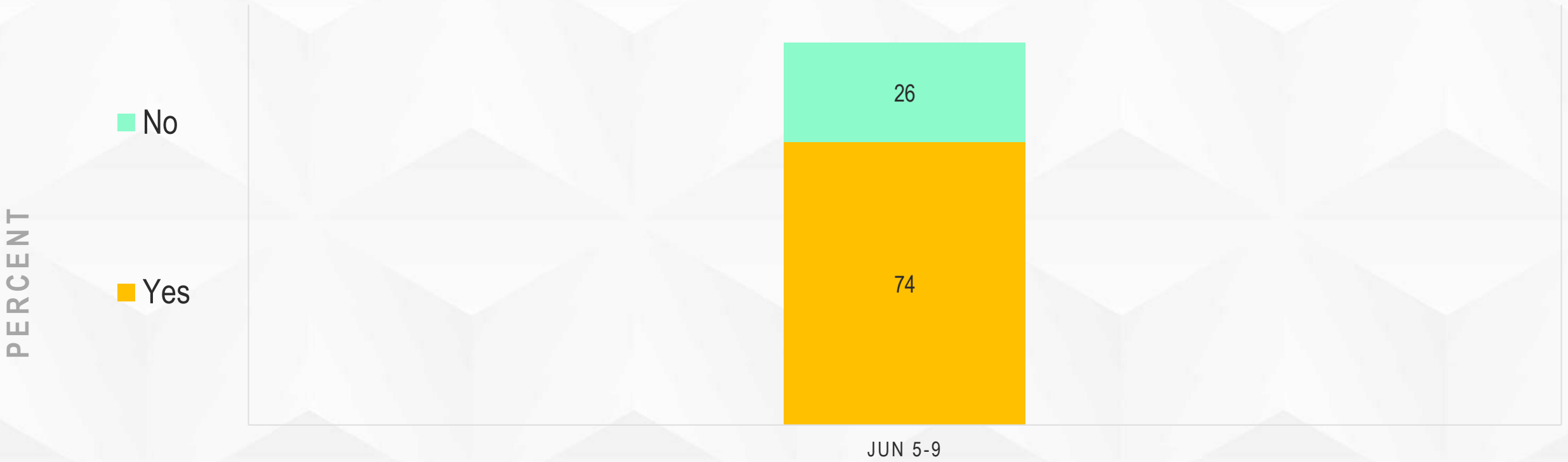
# HOW ARE YOU SCREENING PATIENTS FOR COVID-19?



*On Average, 1% of patients have been turned away because they posed too much of a risk*

If open:

# ARE YOU SEEING PATIENTS WHO ARE FRONTLINE OR ESSENTIAL WORKERS WHO MAY HAVE BEEN IN CONTACT WITH INFECTED PEOPLE?



# HOW ARE YOUR PATIENTS REACTING WHEN YOU ARE CONTACTING TO RESCHEDULE?

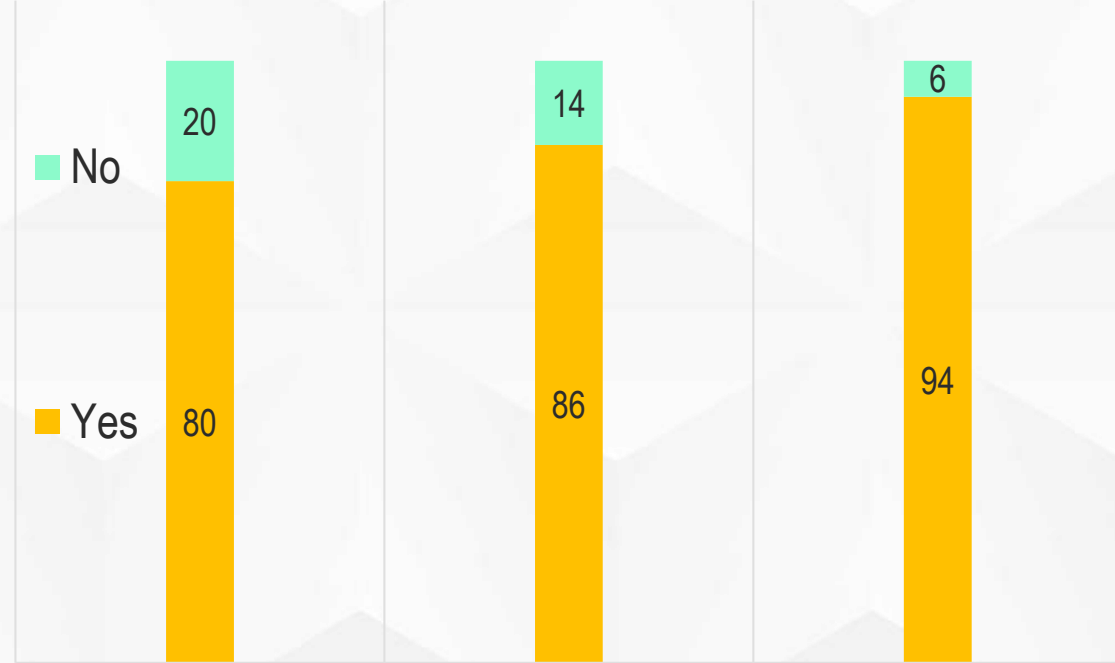


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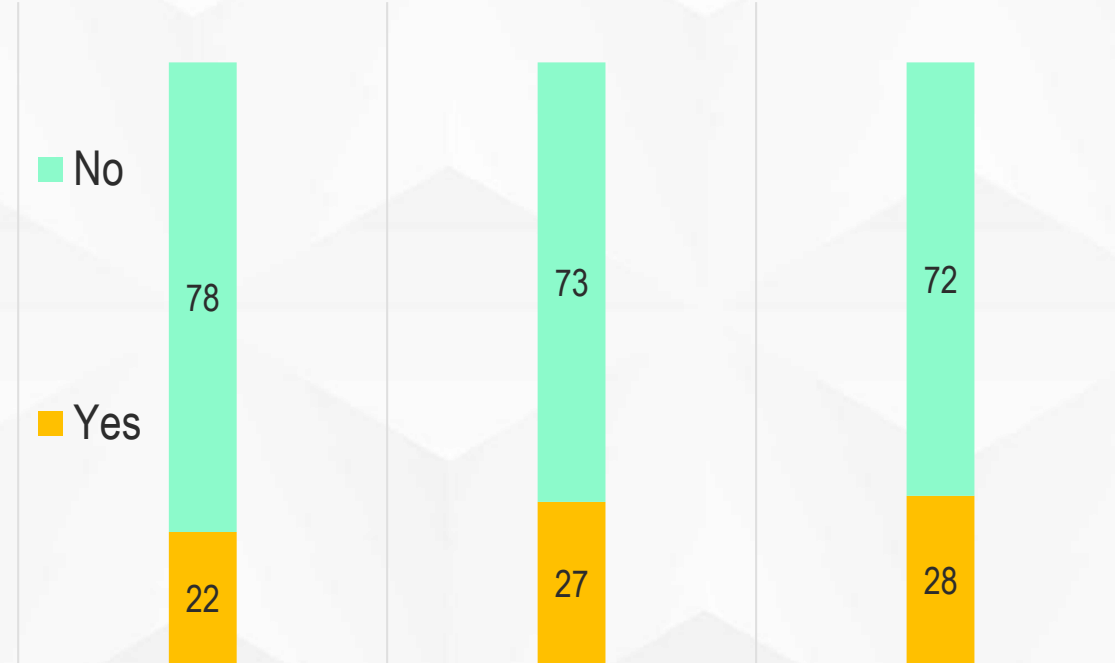
# TYPES OF PATIENTS SEEING

PERCENT

### SEEING NEW PATIENTS

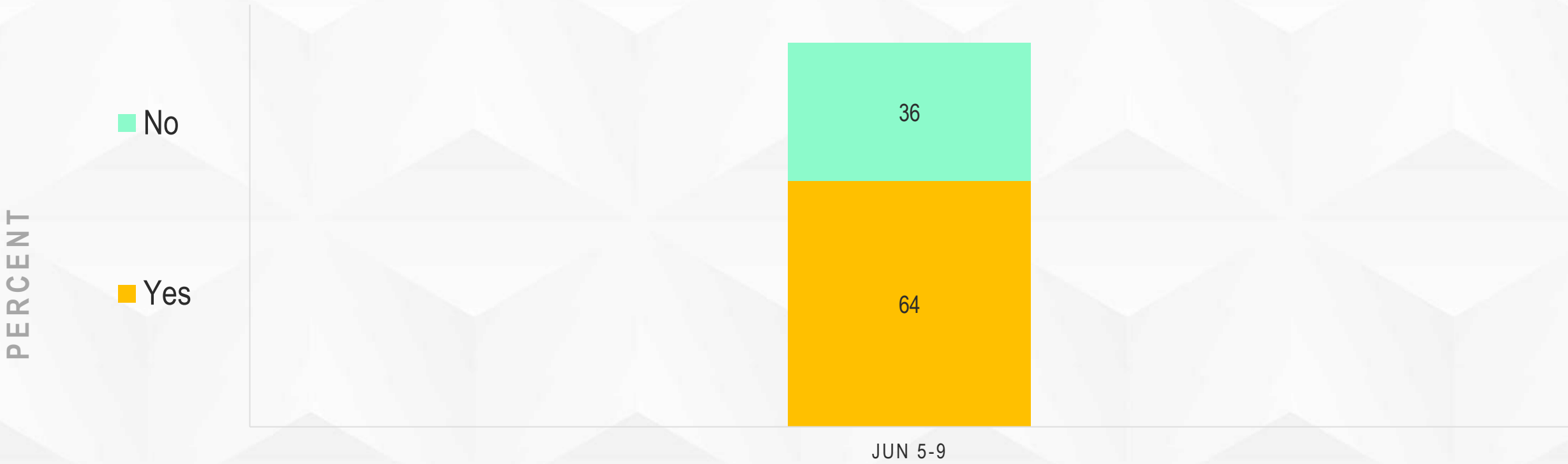


### SEEING WALK-INS

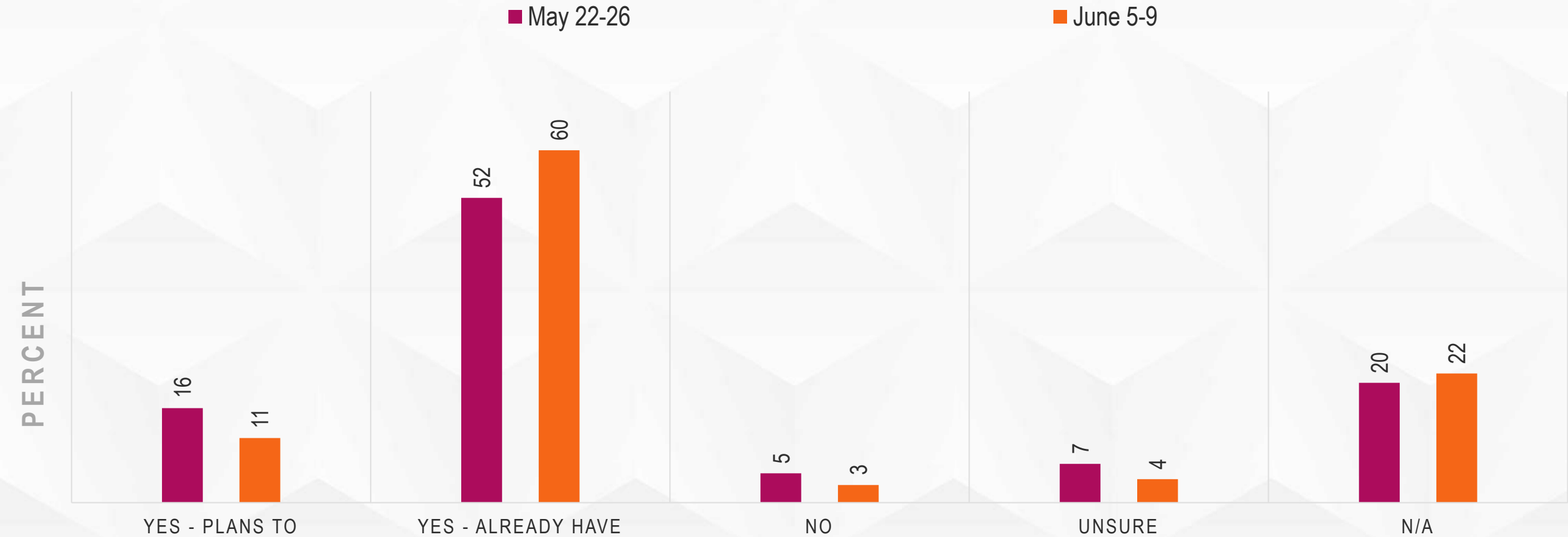


If open:

# ARE YOU CURRENTLY PERFORMING CONTACT LENS FITTINGS/TRAININGS IN YOUR OFFICE?

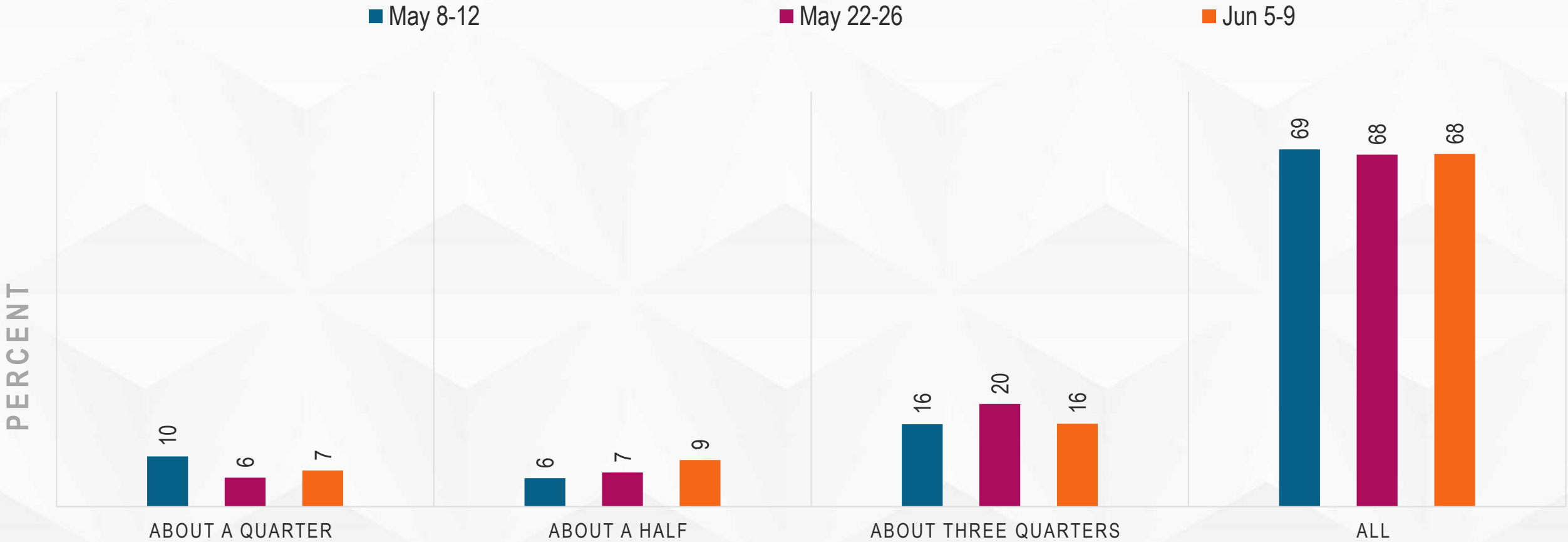


# ARE THERE PLANS TO RE-HIRE ANY STAFF THAT WAS LAID OFF?



IF PLANS TO RE-HIRE:

# HOW MUCH OF THE STAFF THAT WAS LAID OFF IS EXPECTED TO BE RE-HIRED?



# 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

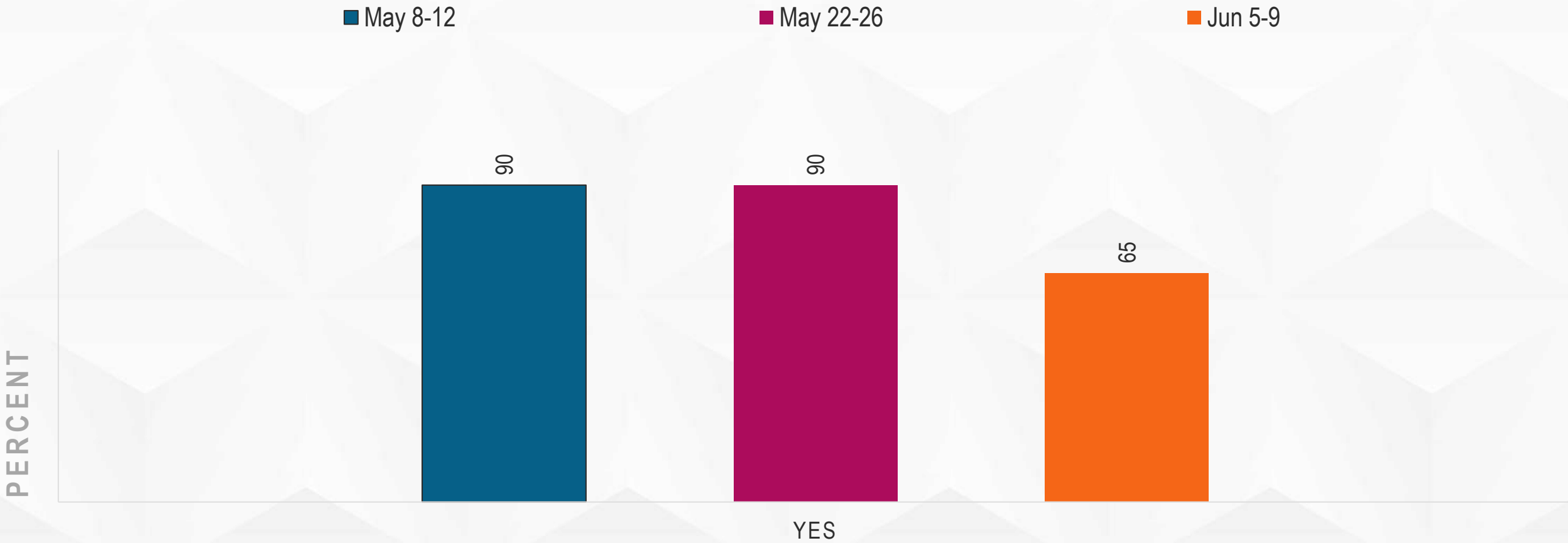




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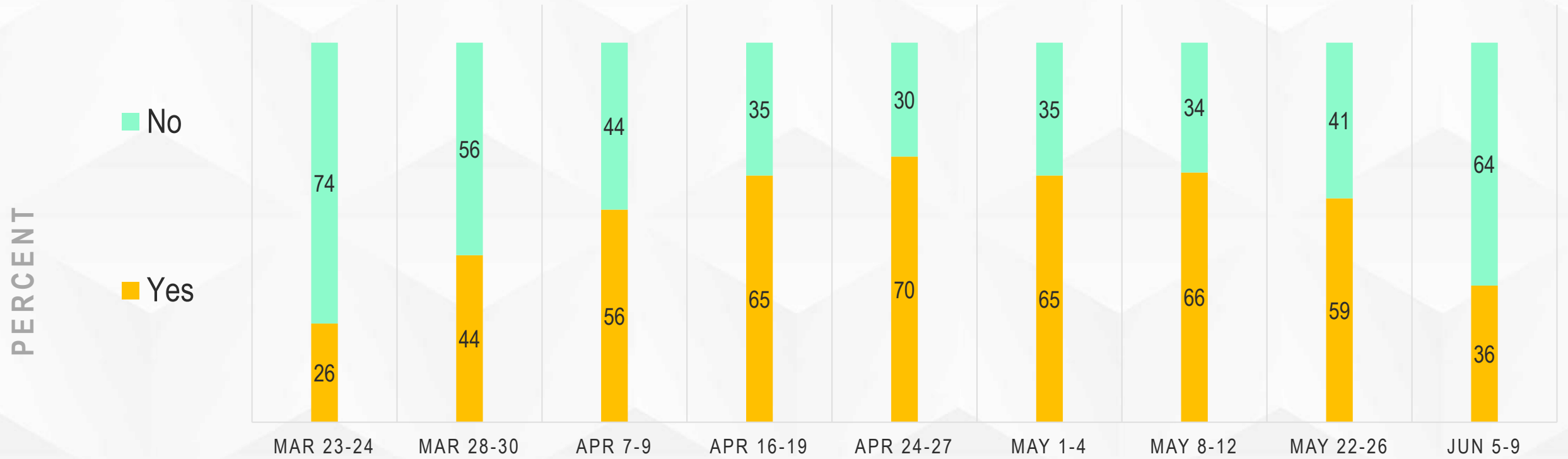
IF OFFERING TELEHEALTH:

# CONTINUE TO OFFER TELEHEALTH SERVICES?

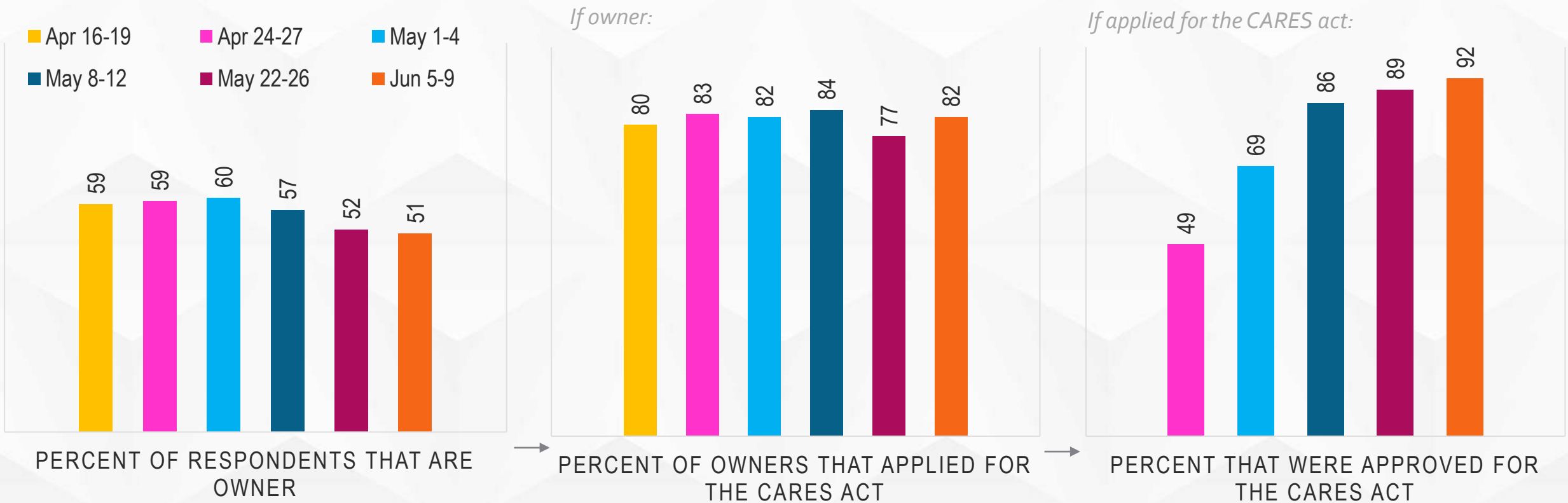


*IF OFFERING TELEHEALTH:*

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



# OWNERS



# IF APPROVED FOR THE CARES ACT: USE FOR CARES ACT MONEY

CHECK ALL THAT APPLY.

■ May 22-26

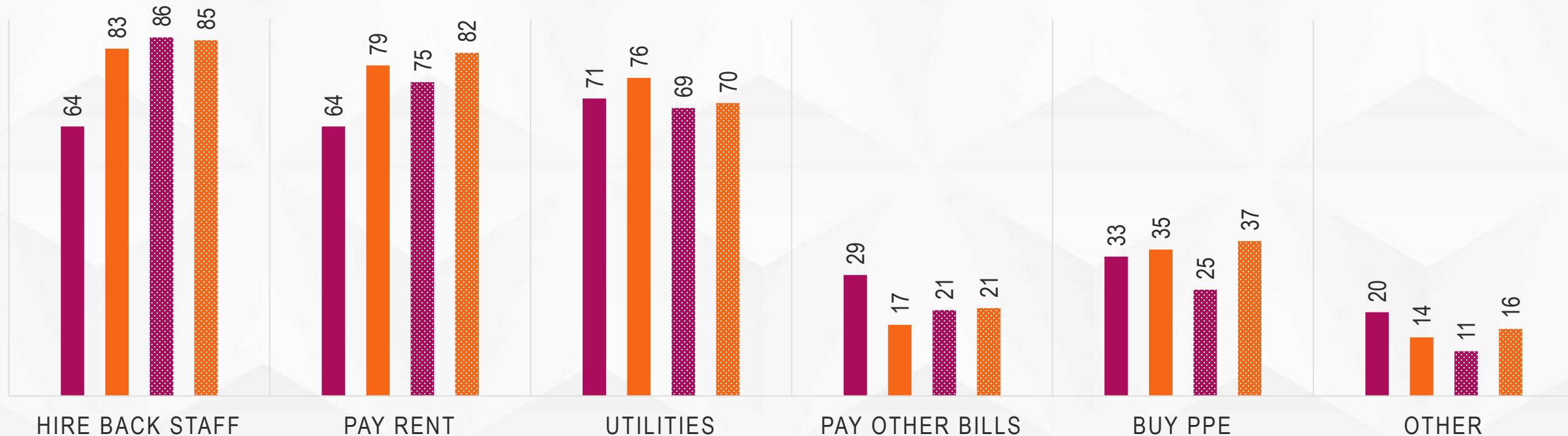
■ Jun 5-9

Intended use if not yet used (17%) (12%)

■ May 22-26

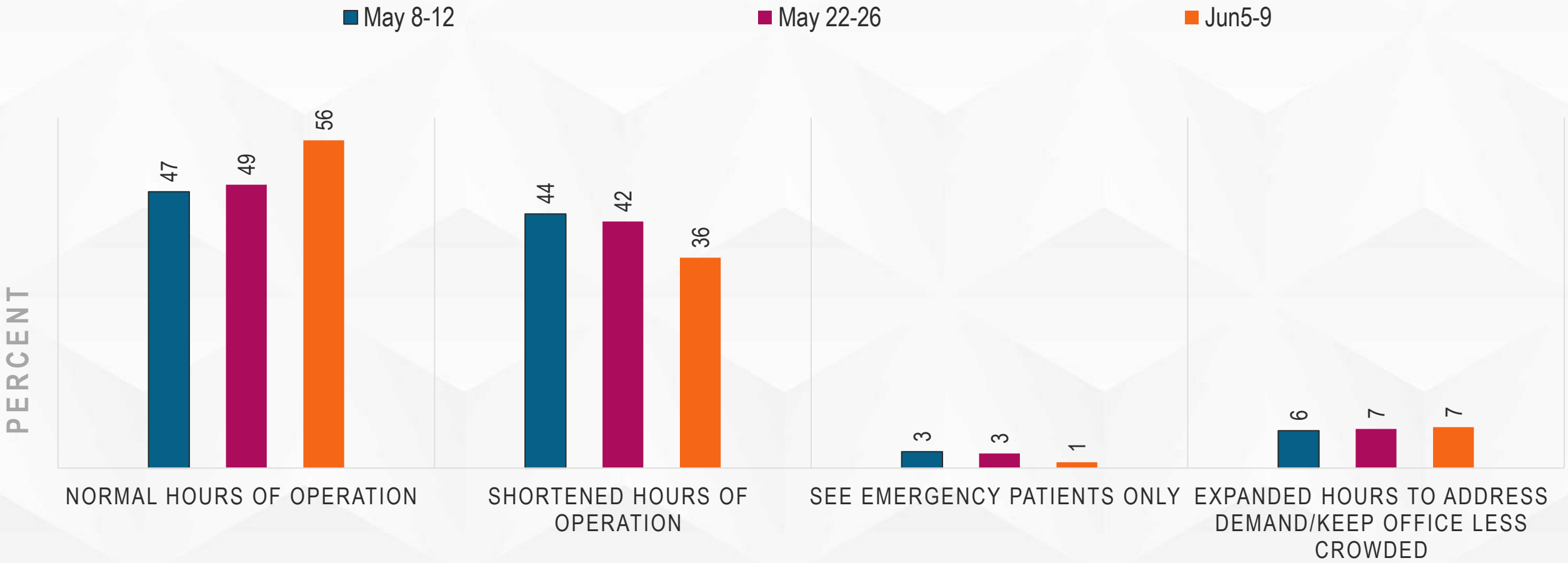
■ Jun 5-9

Actual use if already used (83%) (88%)



If open:

# NEW HOURS OF OPERATION



**BEFORE THE CORONAVIRUS PANDEMIC, WHAT WAS THE AVERAGE NUMBER OF PATIENTS YOUR PRACTICE WOULD SEE IN A DAY?**

May 1-4	May 8-11	May 22-26	Jun 5-9
<b>25.2</b>	<b>28.5</b>	<b>24.4</b>	<b>25.0</b>



**HOW MANY PATIENTS IS YOUR PRACTICE SEEING NOW PER DAY?**

May 8-11	May 22-26	Jun 5-9
<b>14.5</b>	<b>14.4</b>	<b>19.1</b>

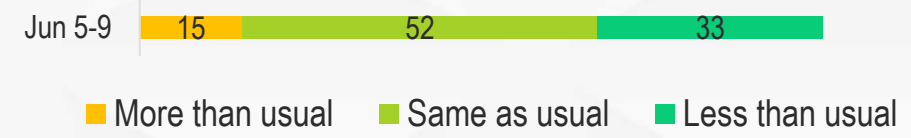
**WHAT PERCENT OF THE PATIENTS YOU ARE SEEING NOW PER DAY ARE MAKING A PURCHASE ?**

May 22-26	Jun 5-9
<b>54%</b>	<b>58%</b>

**WHAT WOULD YOU ESTIMATE YOUR OVERALL REVENUE PER WEEK IS CURRENTLY AS A PERCENTAGE OF THE REVENUE YOU COLLECTED DURING AN AVERAGE WEEK BEFORE CORONAVIRUS?**

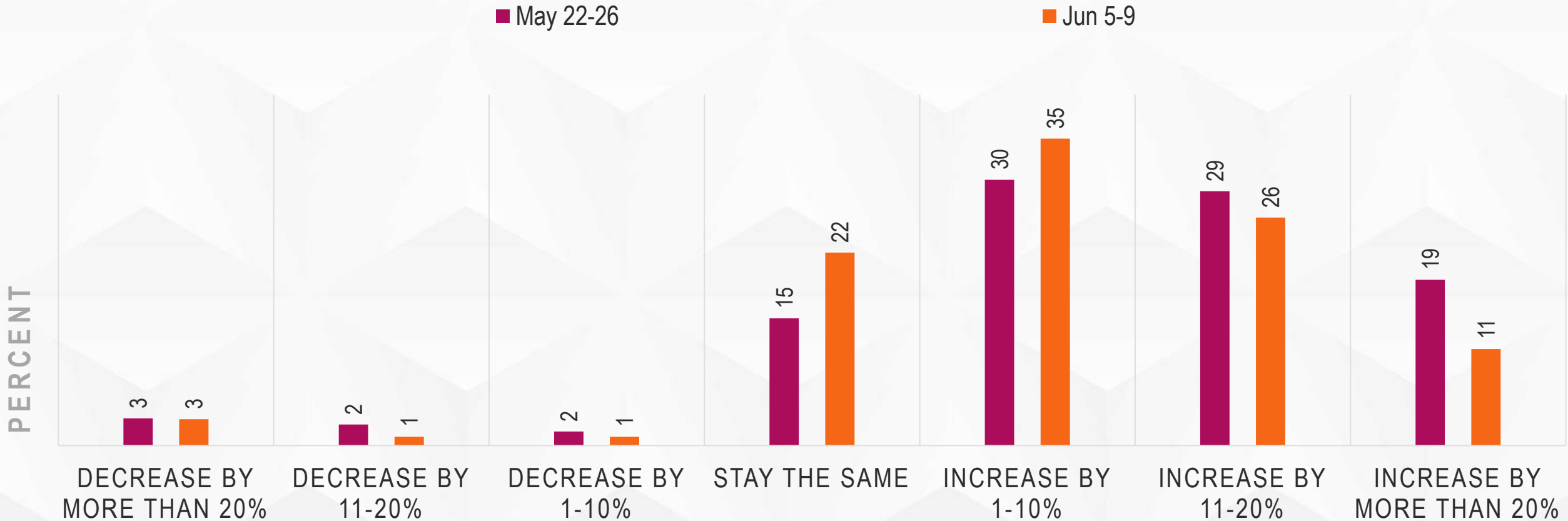
May 22-26	June 5-9
<b>51%</b>	<b>62%</b>

**HOW WOULD YOU RATE YOUR CURRENT PROFITABILITY PER PATIENT?**



If open:

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



If closed:

# STARTING WITH THE WEEK OF 6/8, HOW MANY MORE WEEKS DO YOU THINK YOUR BUSINESS CAN SURVIVE NOT BEING PERMITTED TO BE OPEN?

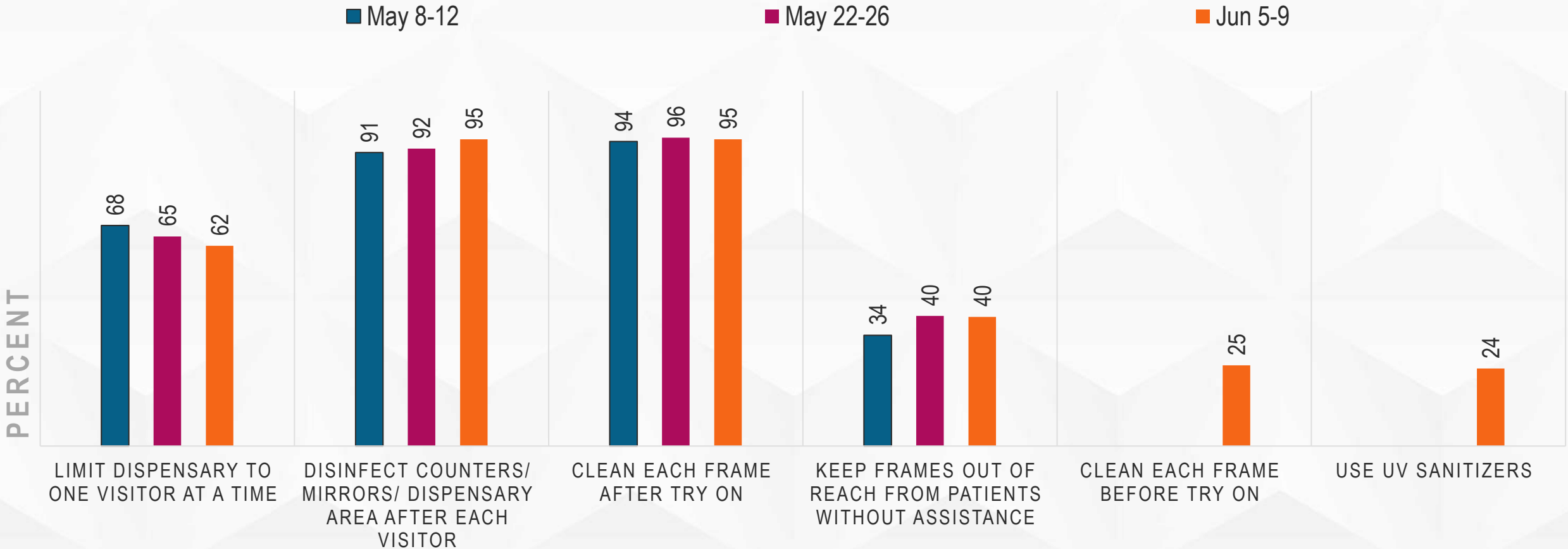
■ Jun 5-9





If open:

# CHANGES TO DISPENSARY



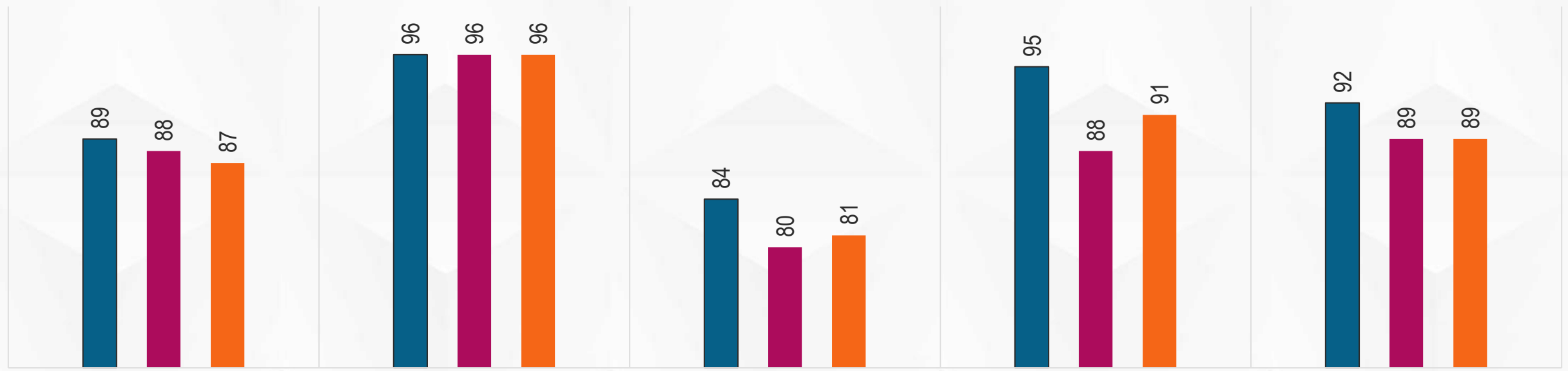
# PPE REQUIREMENTS: *DOCTORS*

■ May 8-12

■ May 22-26

■ Jun 5-9

PERCENT



GLOVES

MASKS

FACE SHIELDS

GOWNS

GOGGLES

N95	39	36	35
SURGICAL	37	32	32
CLOTH	6	11	7
ANY	18	22	26

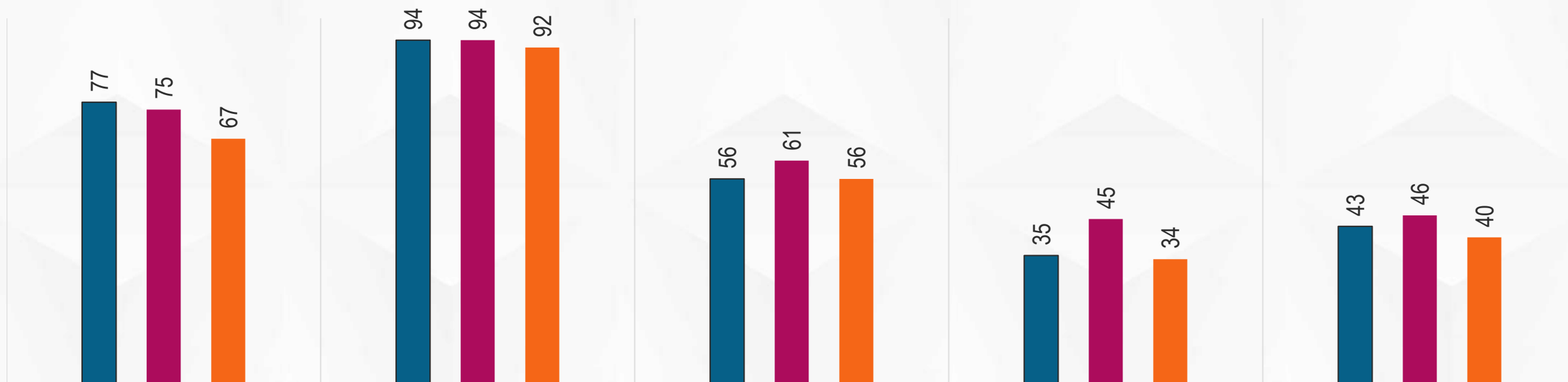
# PPE REQUIREMENTS: *OPTICIANS/DISPENSERS*

■ May 8-12

■ May 22-26

■ Jun 5-9

PERCENT



GLOVES

MASKS

FACE SHIELDS

GOWNS

GOGGLES

N95	11	17	14
SURGICAL	50	37	36
CLOTH	19	18	13
ANY	21	29	37

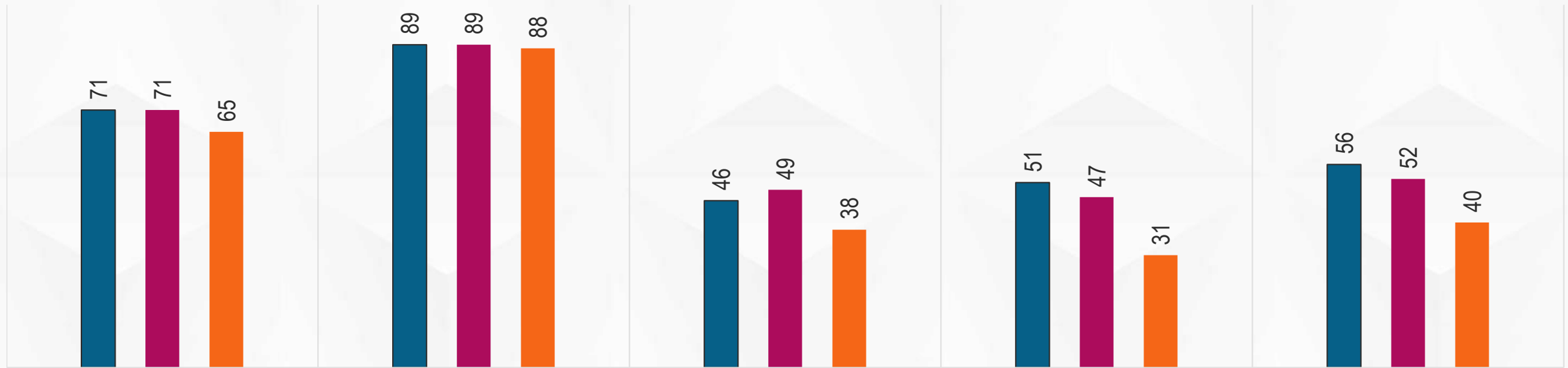
# PPE REQUIREMENTS: *TECHS*

■ May 8-12

■ May 22-26

■ Jun 5-9

PERCENT



GLOVES

MASKS

FACE SHIELDS

GOWNS

GOGGLES

N95	15	20	16
SURGICAL	50	37	38
CLOTH	21	14	11
ANY	15	29	35

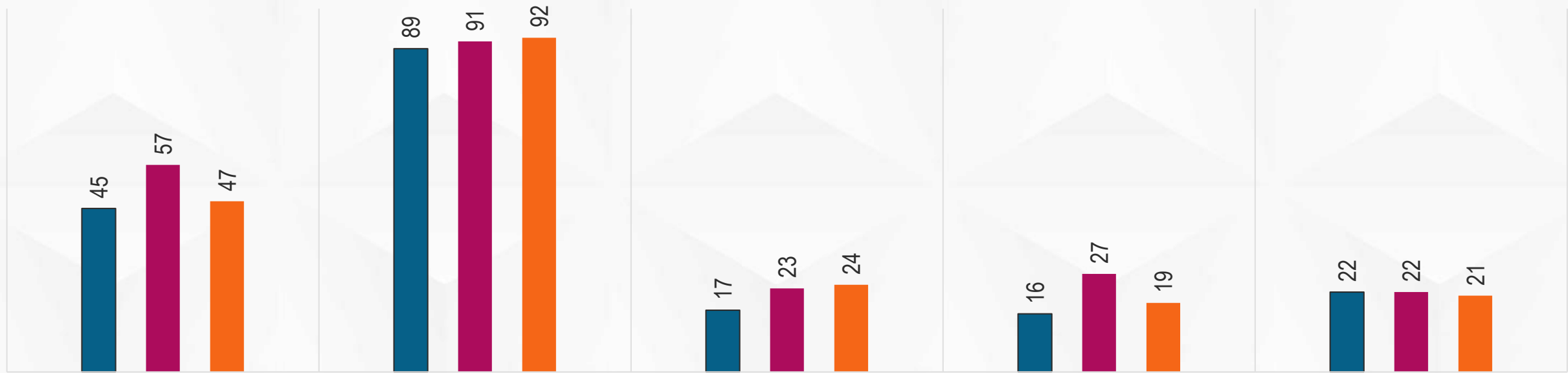
# PPE REQUIREMENTS: *RECEPTION/STAFF*

■ May 8-12

■ May 22-26

■ Jun 5-9

PERCENT



GLOVES

MASKS

FACE SHIELDS

GOWNS

GOGGLES

N95	5	12	10
SURGICAL	46	36	39
CLOTH	23	20	15
ANY	26	32	37

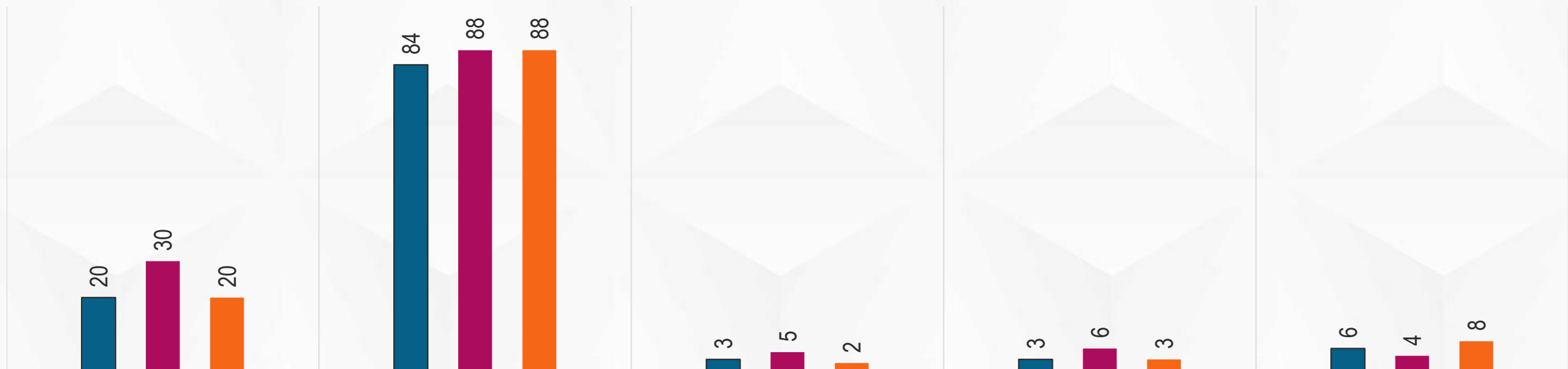
# PPE REQUIREMENTS: *PATIENTS*

■ May 8-12

■ May 22-26

■ Jun 5-9

PERCENT



GLOVES

MASKS

FACE SHIELDS

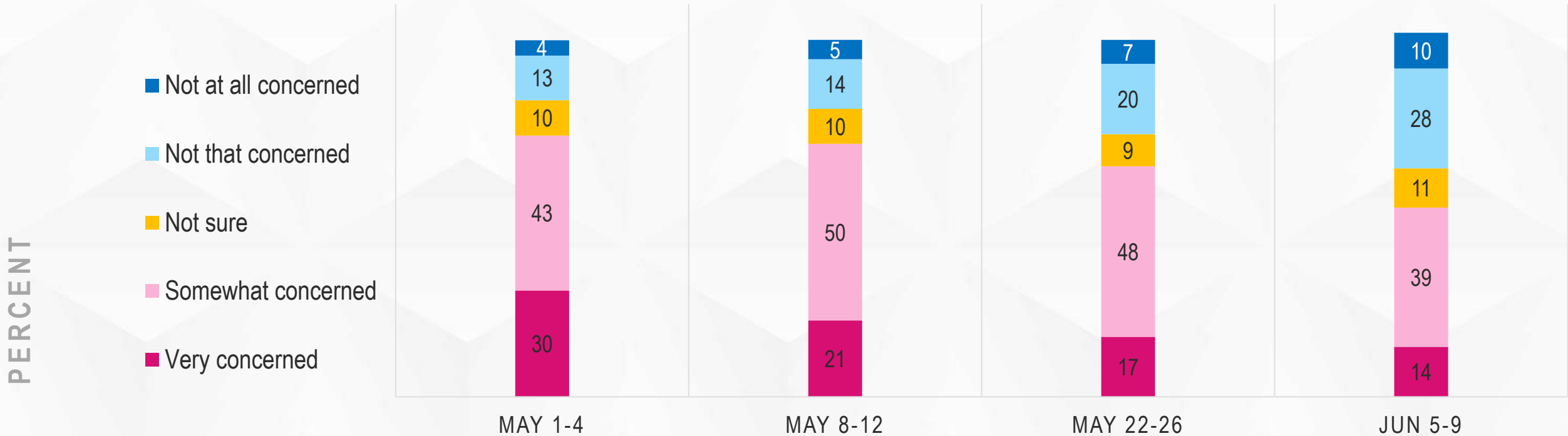
GOWNS

GOGGLES

N95	3	4	3
SURGICAL	23	15	15
CLOTH	20	17	12
ANY	55	65	70

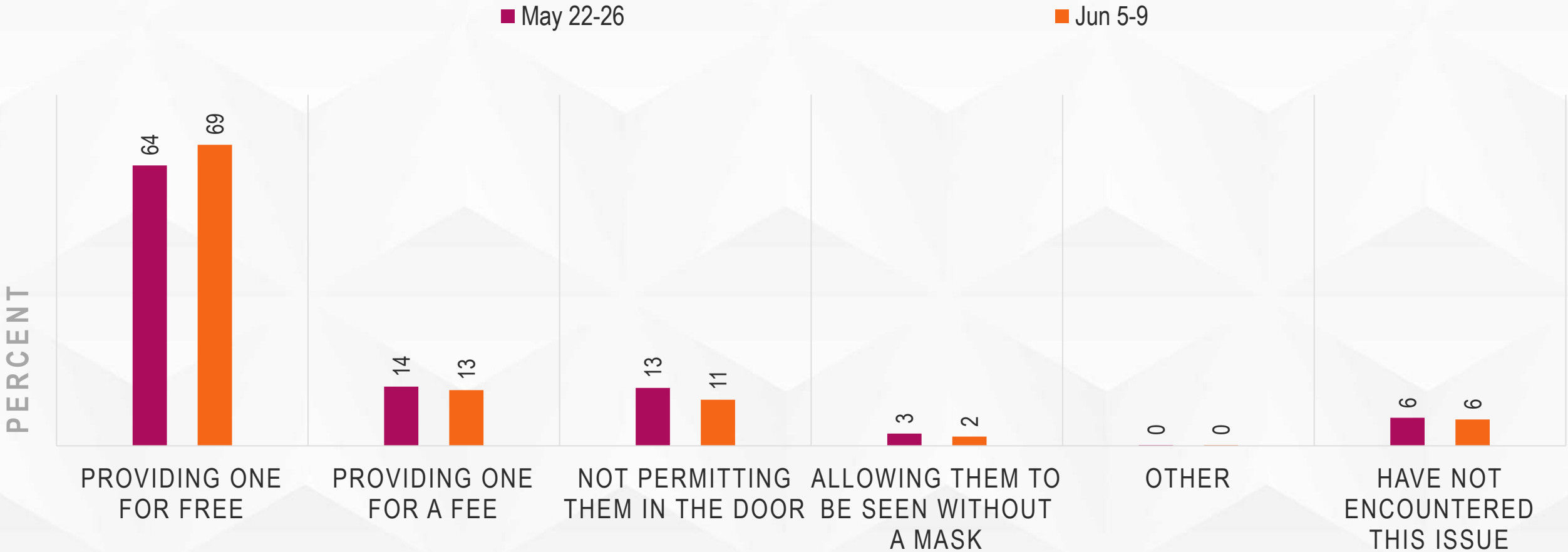
If closed:

# CONCERN ABOUT ACQUIRING NEEDED PPE



If open:

# HOW ARE YOU HANDLING PATIENTS WHO ARRIVE WITHOUT A MASK?



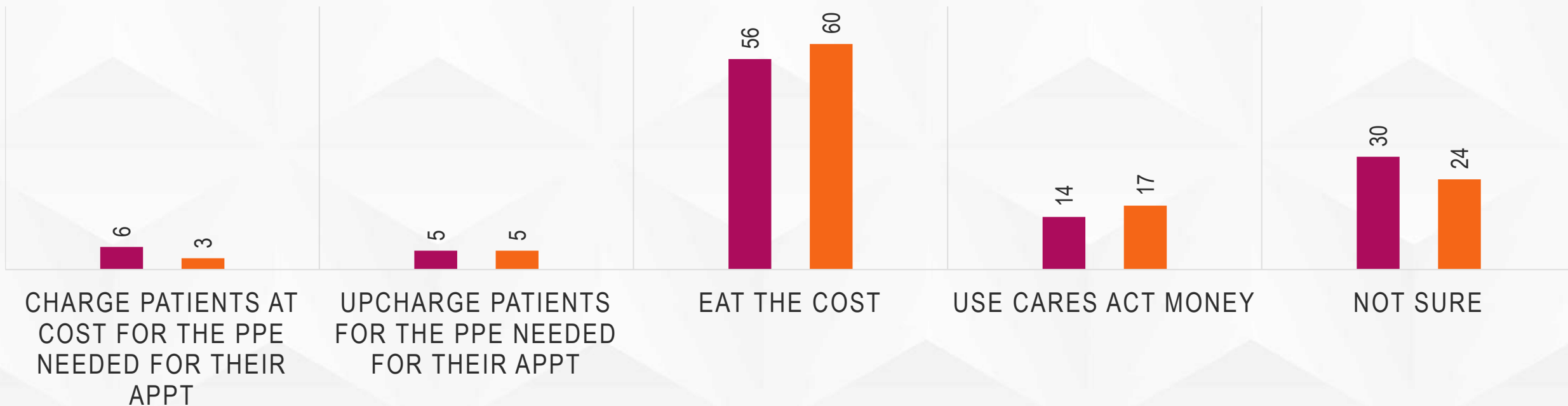


# HOW WILL YOU HANDLE THE ADDITIONAL COSTS OF PPE?

■ May 22-26

■ Jun 5-9

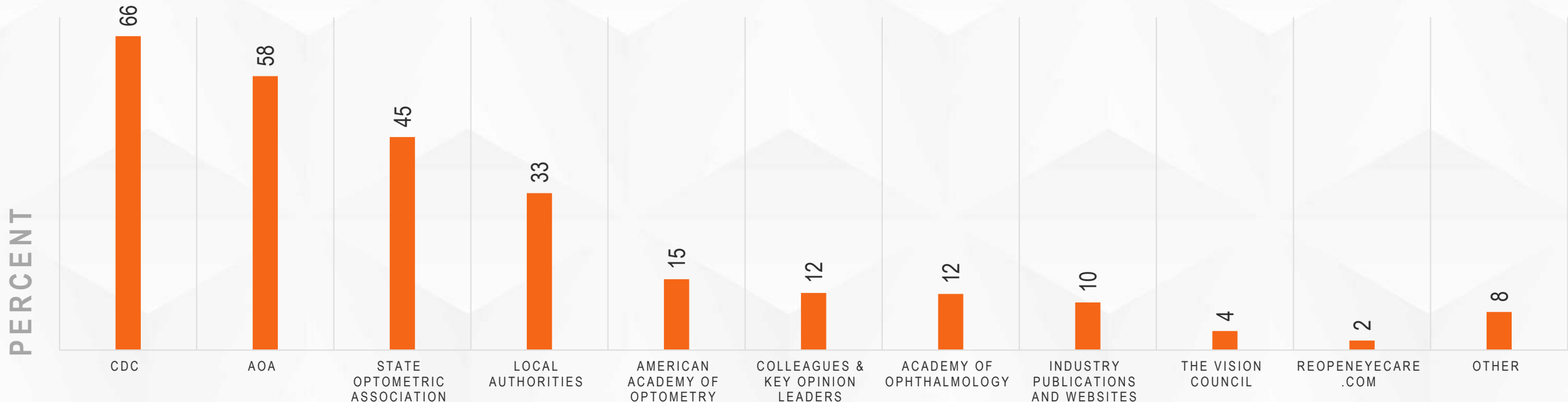
PERCENT



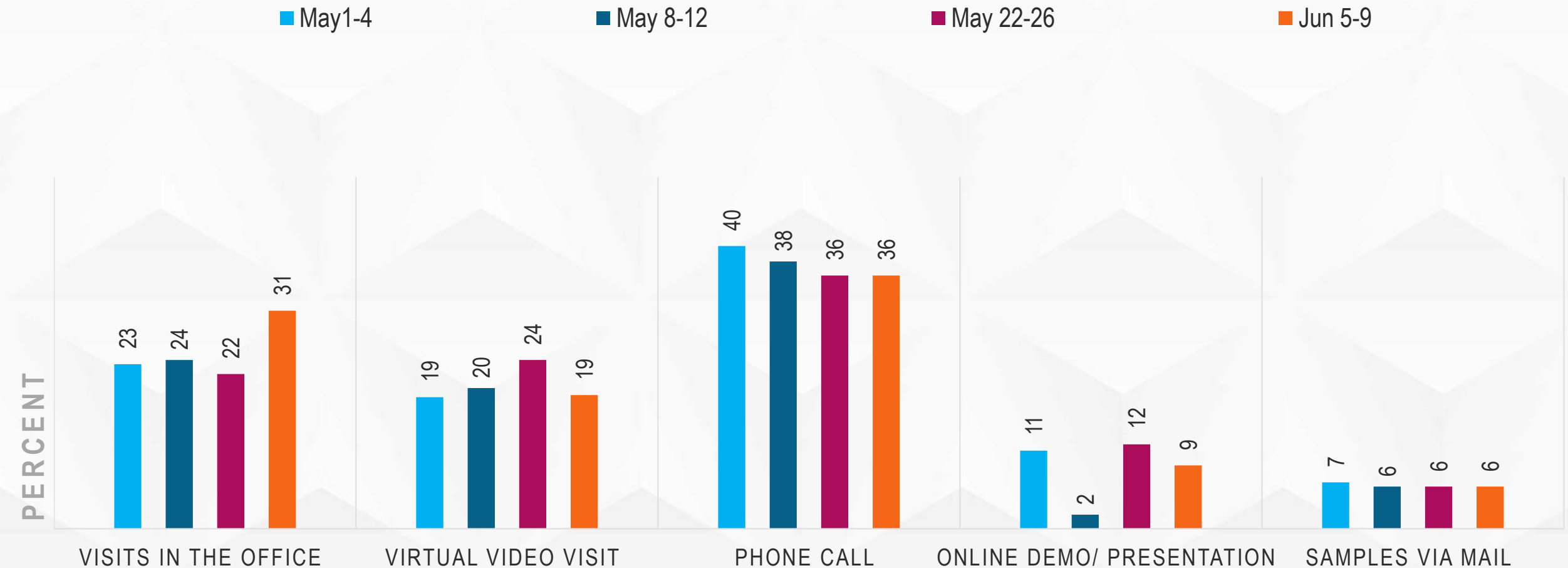
# WHO ARE YOUR GO TO SOURCES FOR INFORMATION ON THE PANDEMIC AS IT RELATES TO YOUR PRACTICE?

*CHOOSE TOP 3.*

■ Jun 5-9



# HOW DO YOU PREFER TO ENGAGE WITH FRAMES SALES REPS OVER THE NEXT FEW MONTHS?



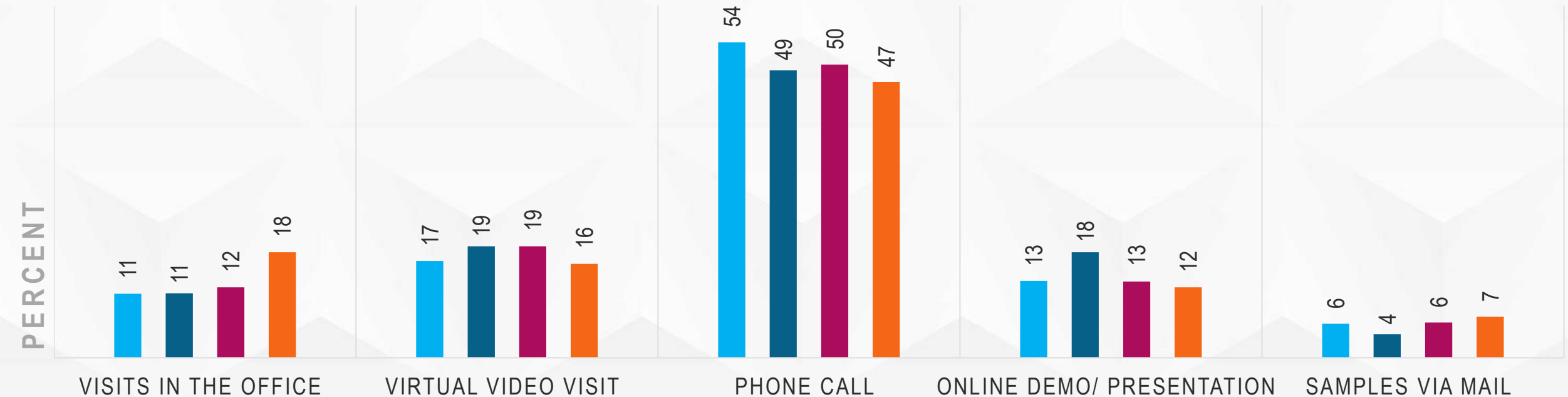
# HOW DO YOU PREFER TO ENGAGE WITH LENS SALES REPS OVER THE NEXT FEW MONTHS?

■ May 1-4

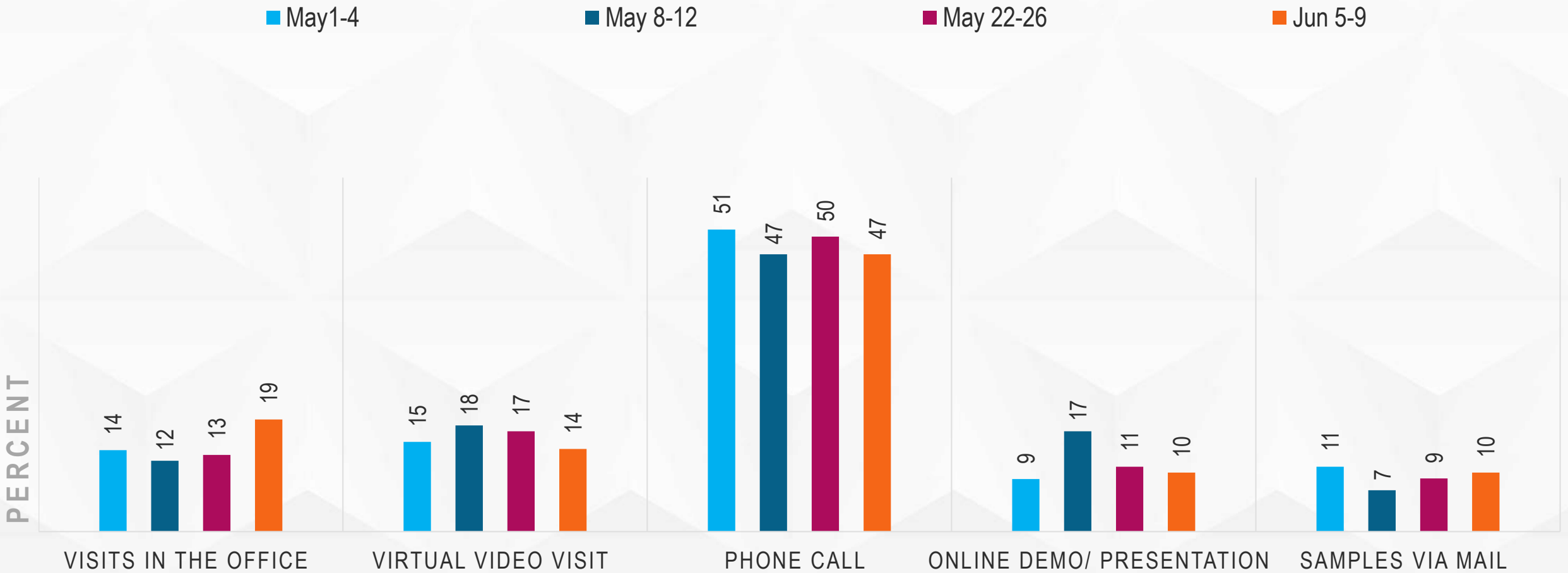
■ May 8-12

■ May 22-26

■ Jun 5-9



# HOW DO YOU PREFER TO ENGAGE WITH CONTACT LENS SALES REPS OVER THE NEXT FEW MONTHS?



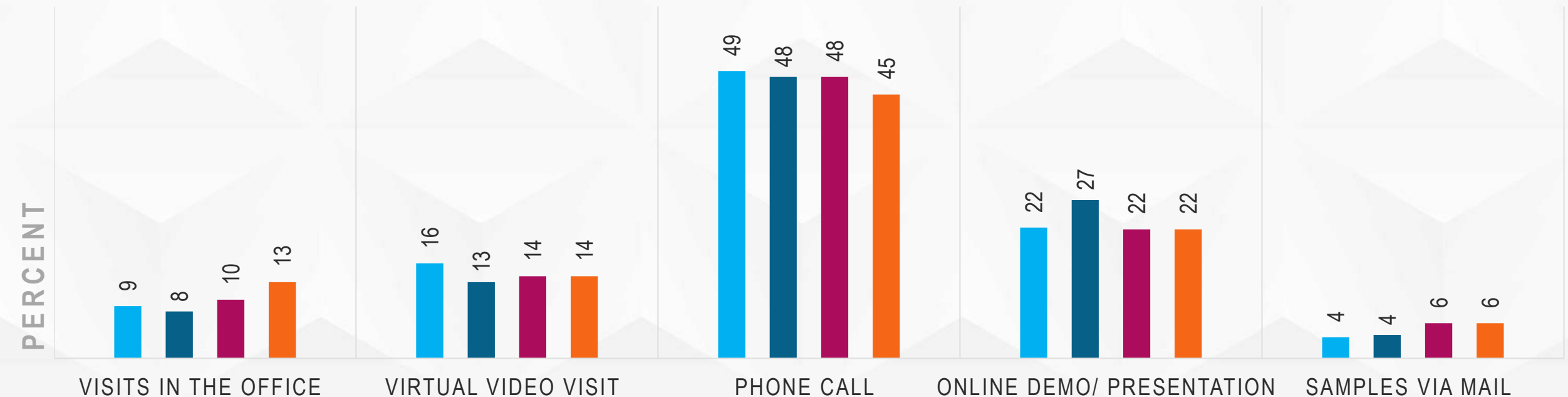
# HOW DO YOU PREFER TO ENGAGE WITH EQUIPMENT SALES REPS OVER THE NEXT FEW MONTHS?

■ May 1-4

■ May 8-12

■ May 22-26

■ Jun 5-9



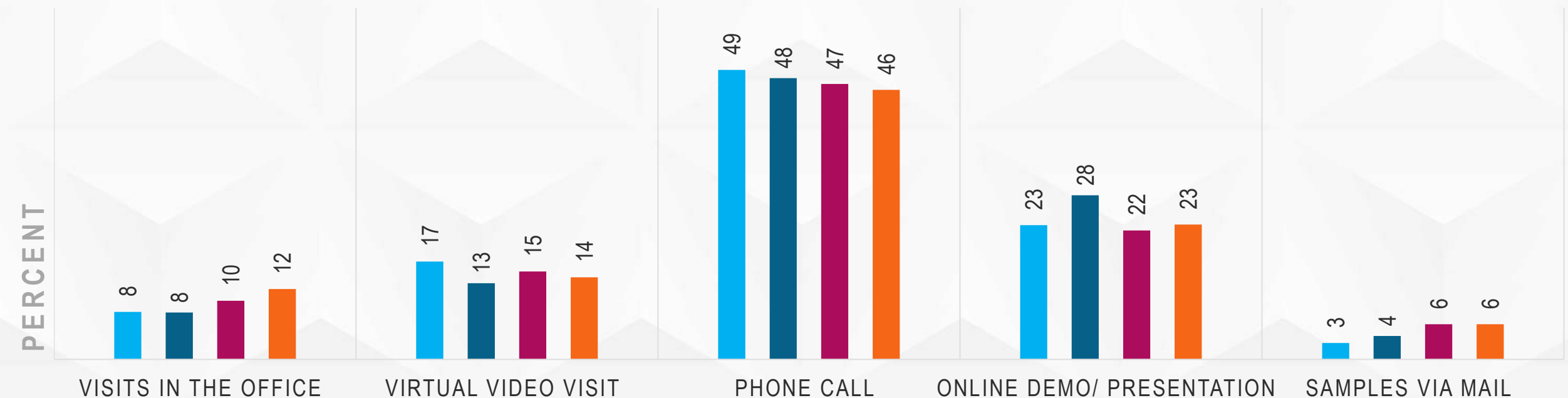
# HOW DO YOU PREFER TO ENGAGE WITH INSTRUMENT SALES REPS OVER THE NEXT FEW MONTHS?

■ May 1-4

■ May 8-12

■ May 22-26

■ Jun 5-9



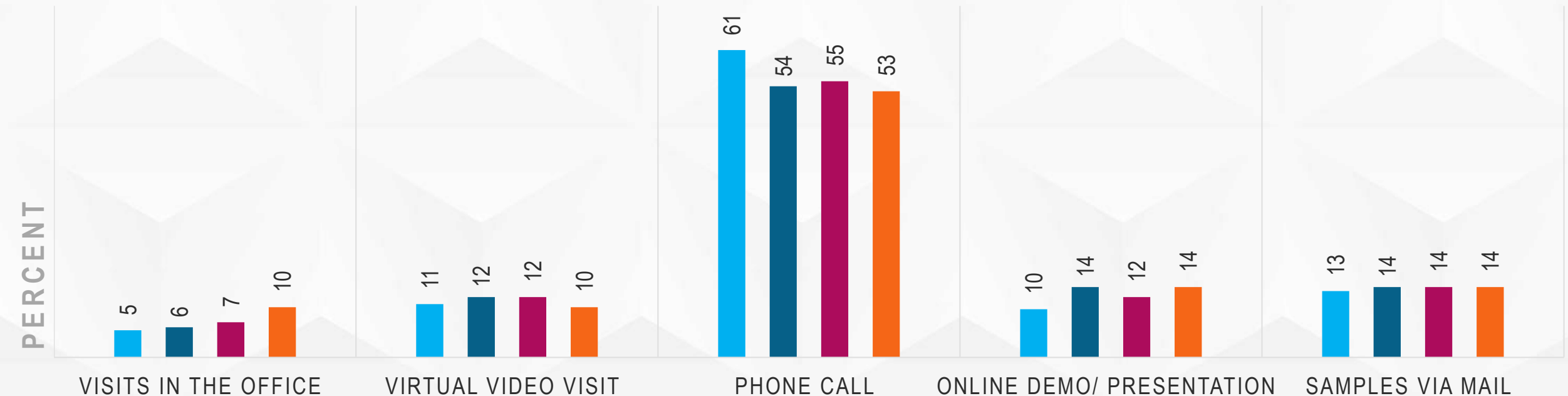
# HOW DO YOU PREFER TO ENGAGE WITH SUPPLIES SALES REPS OVER THE NEXT FEW MONTHS?

■ May 1-4

■ May 8-12

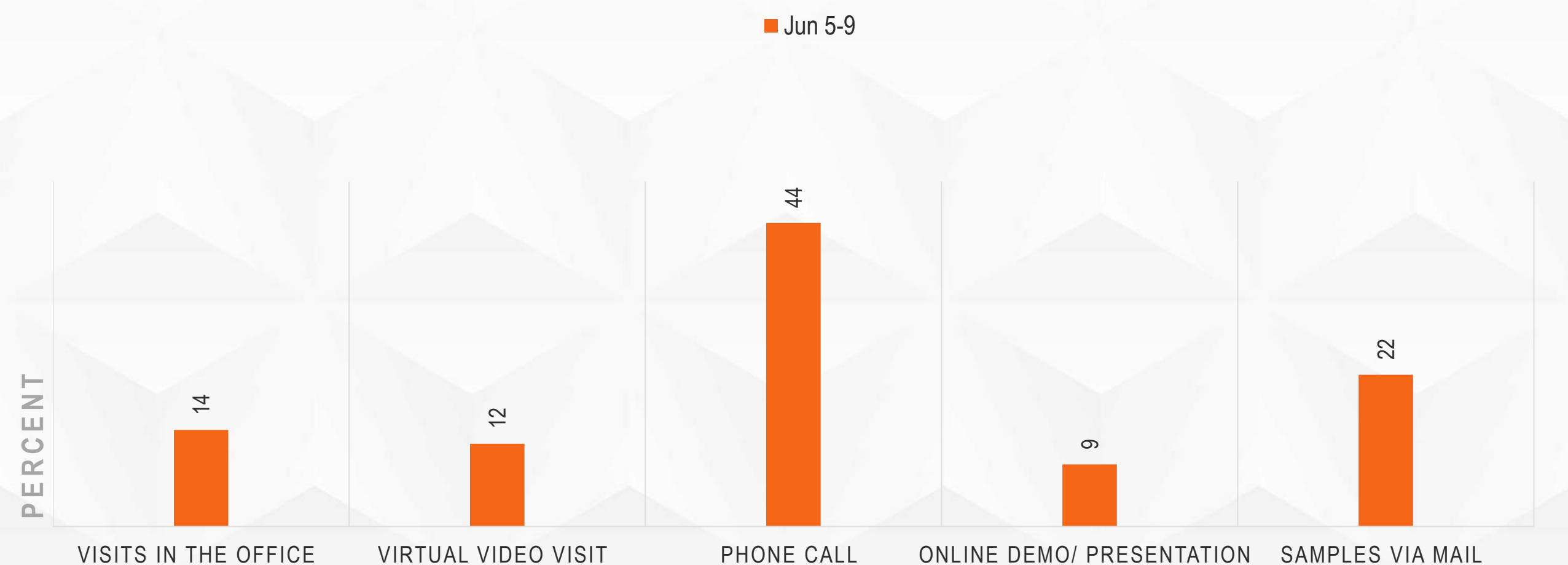
■ May 22-26

■ Jun 5-9





# HOW DO YOU PREFER TO ENGAGE WITH PHARMACEUTICAL SALES REPS OVER THE NEXT FEW MONTHS?



# ASSUMING PUBLIC HEALTH GUIDANCE ALLOWS GATHERINGS AND TRAVEL, WHEN DO YOU ANTICIPATE BEING COMFORTABLE TRAVELING TO INDUSTRY EVENTS/MEETINGS?

## WITHIN DRIVING DISTANCE

■ Apr 16-19    
 ■ Apr 24-27    
 ■ May 1-4    
 ■ May 8-12    
 ■ May 22-26    
 ■ Jun 5-9



# ASSUMING PUBLIC HEALTH GUIDANCE ALLOWS GATHERINGS AND TRAVEL, WHEN DO YOU ANTICIPATE BEING COMFORTABLE TRAVELING TO INDUSTRY EVENTS/MEETINGS?

## TRAVELING ON A PLANE

■ Apr 16-19    
 ■ Apr 24-27    
 ■ May 1-4    
 ■ May 8-12    
 ■ May 22-26    
 ■ Jun 5-9



THIS PAST WEEK, IN MANY CITIES AND TOWNS ACROSS THE COUNTRY, THERE HAVE BEEN DEMONSTRATIONS, PROTESTS AND, UNFORTUNATELY, SOME RIOTING AND VANDALISM. HAS ANY OF THIS ACTIVITY AFFECTED YOUR EYECARE PRACTICE?



# DO YOU HAVE ANY IDEAS FOR GENERATING EXTRA REVENUE?

# DO YOU HAVE ANY IDEAS FOR CUTTING COSTS?

## ECP are saying....

- Train staff on selling. Make every visit count.  
Push multi-pair sales.
- Expand services offered
- Keep on top of contact lens re-orders
- Be selective with accepting insurance
- Charge for no shows
- Sell defogger and other extras like PPE
- Sell on website
- Increase fees
- Increase marketing
- Telehealth
- Sales for sunglasses
- Offer mail/curbside

- Decrease staff and/or hours
- Less inventory/frames
- Only order minimums
- Increase fees
- Decrease marketing
- Limit hours open if not busy
- Examine cheapest sanitation products