

# ECPPulse *SURVEY*

Jobson **OPTICAL**  
Information Services  
**RESEARCH**

**Q3 2023**

# ABOUT THIS SURVEY...

- In March 2020, as COVID-19 reached our nation, Jobson Research began a series of research studies that surveyed ECPs on how they were dealing with the pandemic. We provided this data frequently and complimentary to our industry to provide some guidance and knowledge to the world of optical about how you all were coping.
- We completed 30 waves of that research over 2+ years, and the questions we asked with each wave varied as time went on. Different topics became more pertinent, new practices and policies emerged, and new information was requested.
- In June of 2022, we pivoted from how the Coronavirus pandemic alone is affecting our industry and focus more on a variety of areas that are currently affecting and influencing ECPs and optical.
- We have created this ECPulse research study, which we will conduct quarterly, to take a pulse of what's going on and how ECPs are responding. There are some questions in this report that we had asked in our past ECP Coronavirus Wave surveys, so we have included trending wherever possible.
- We are always interested in your ideas and interest for future research, so please feel free to email [jwaller@jobson.com](mailto:jwaller@jobson.com) with any input or feedback.

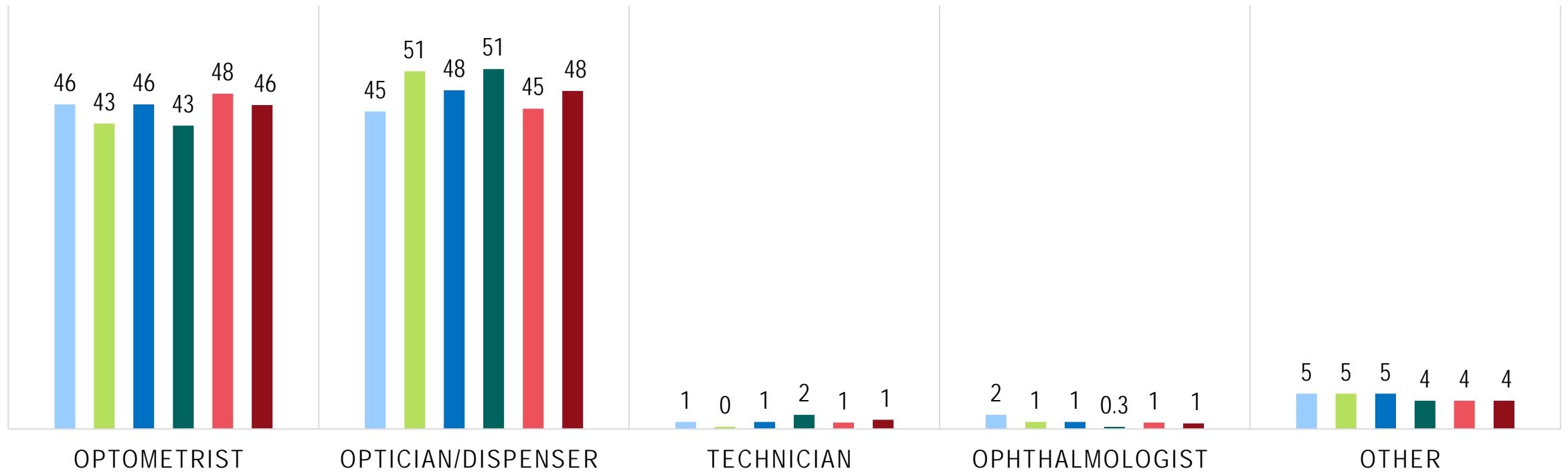
# SURVEY WAVES

- Q2 2022 ECPulse ran in June 2022 and surveyed 403 ECPs.
- Q3 2022 ECPulse ran in Sep 2022 and surveyed 298 ECPs.
- Q4 2022 ECPulse ran in Dec 2022 and surveyed 279 ECPs.
- Q1 2023 ECPulse ran in Mar 2023 and surveyed 296 ECPs.
- Q2 2023 ECPulse ran in Jun 2023 and surveyed 324 ECPs.
- Q3 2023 ECPulse ran in Sep 2023 and surveyed 388 ECPs.

# RESPONDENT DEMOGRAPHICS

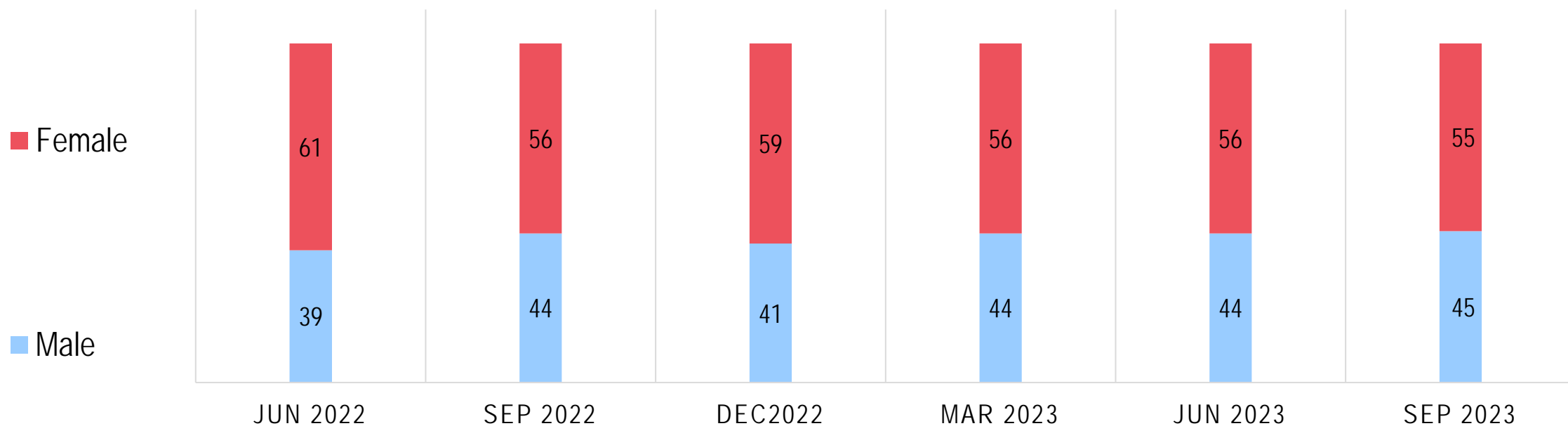
# RESPONDENT PROFESSION

■ Jun 2022  
 ■ Sep 2022  
 ■ Dec 2022  
 ■ Mar 2023  
 ■ Jun 2023  
 ■ Sep2023



PERCENT

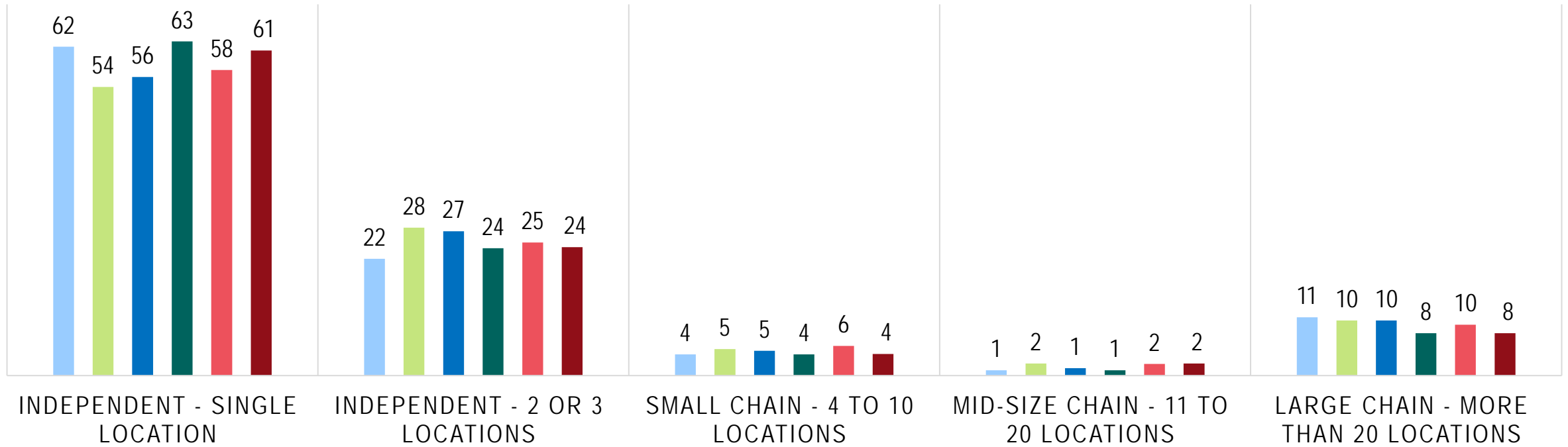
# GENDER



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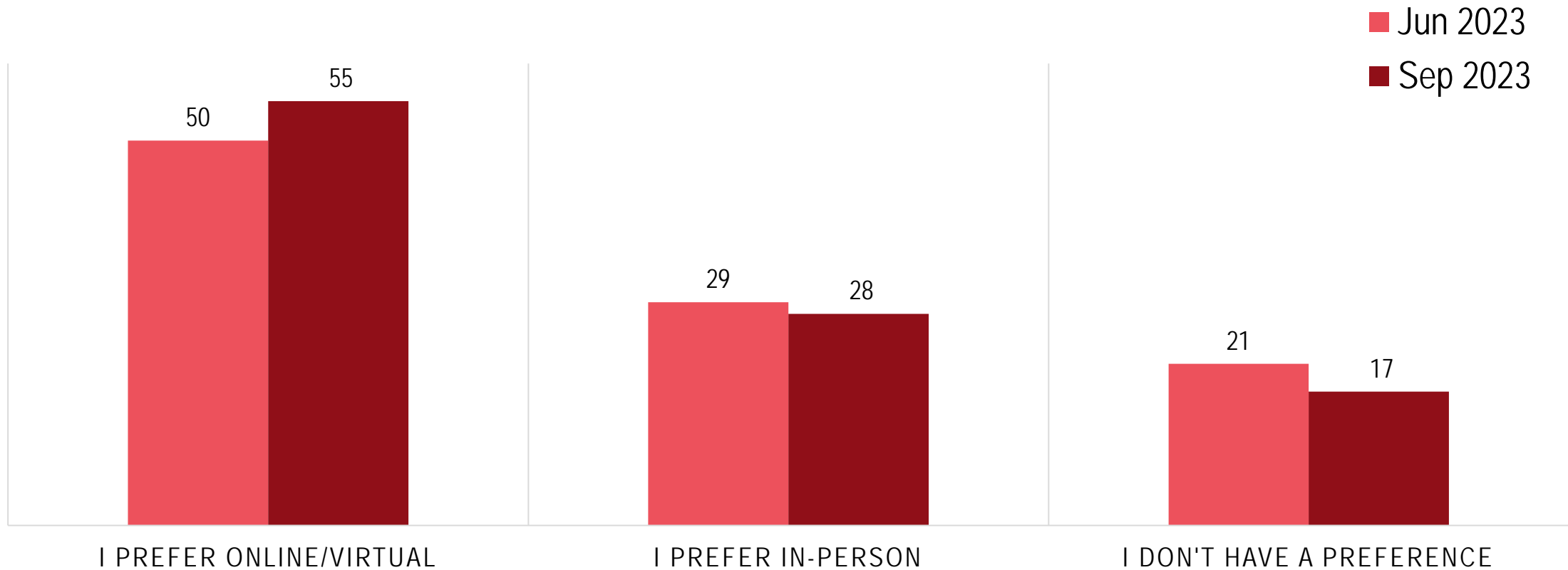
# LOCATION TYPE

■ Jun 2022  
 ■ Sep 2022  
 ■ Dec 2022  
 ■ Mar 2023  
 ■ Jun 2023  
 ■ Sep 2023



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# HOW DO YOU PREFER TO COMPLETE YOUR CE?

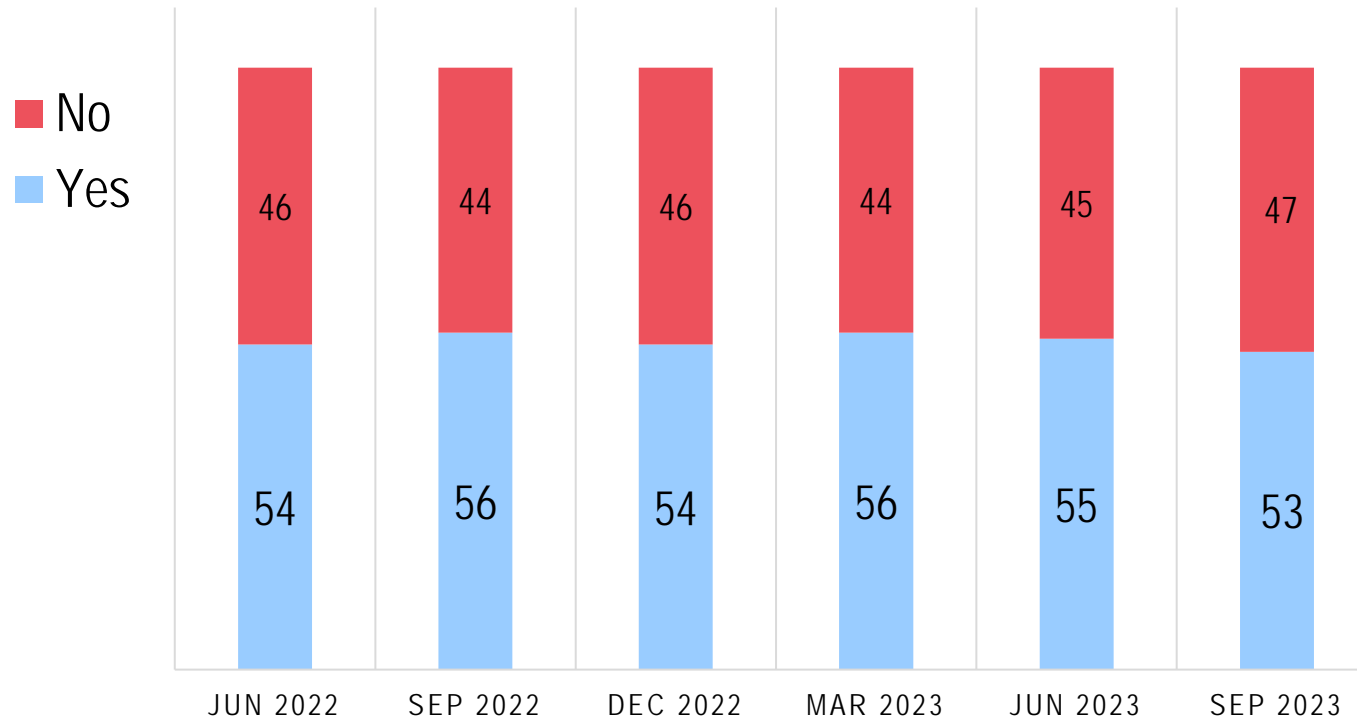


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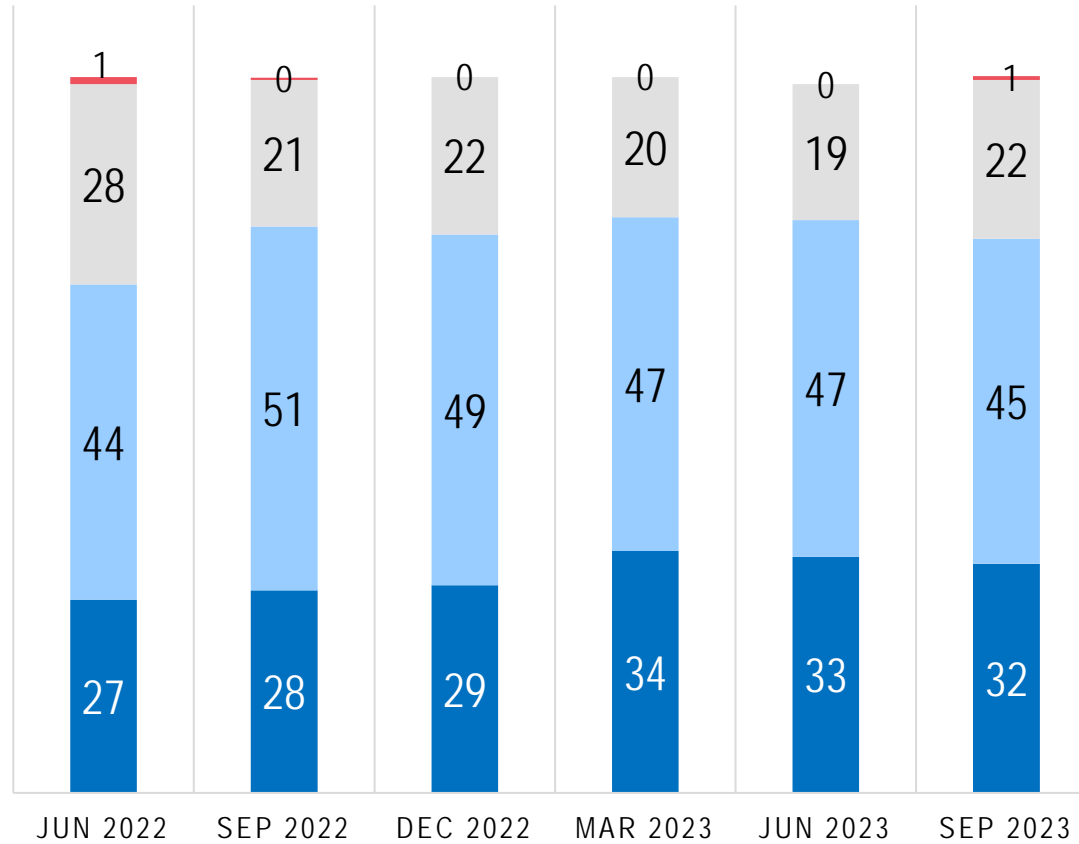
# ECPS & THEIR PRACTICES

# ARE YOU HAVING DIFFICULTY STAFFING YOUR LOCATION?



# HAS YOUR LOCATION INCREASED PRICES THIS YEAR?

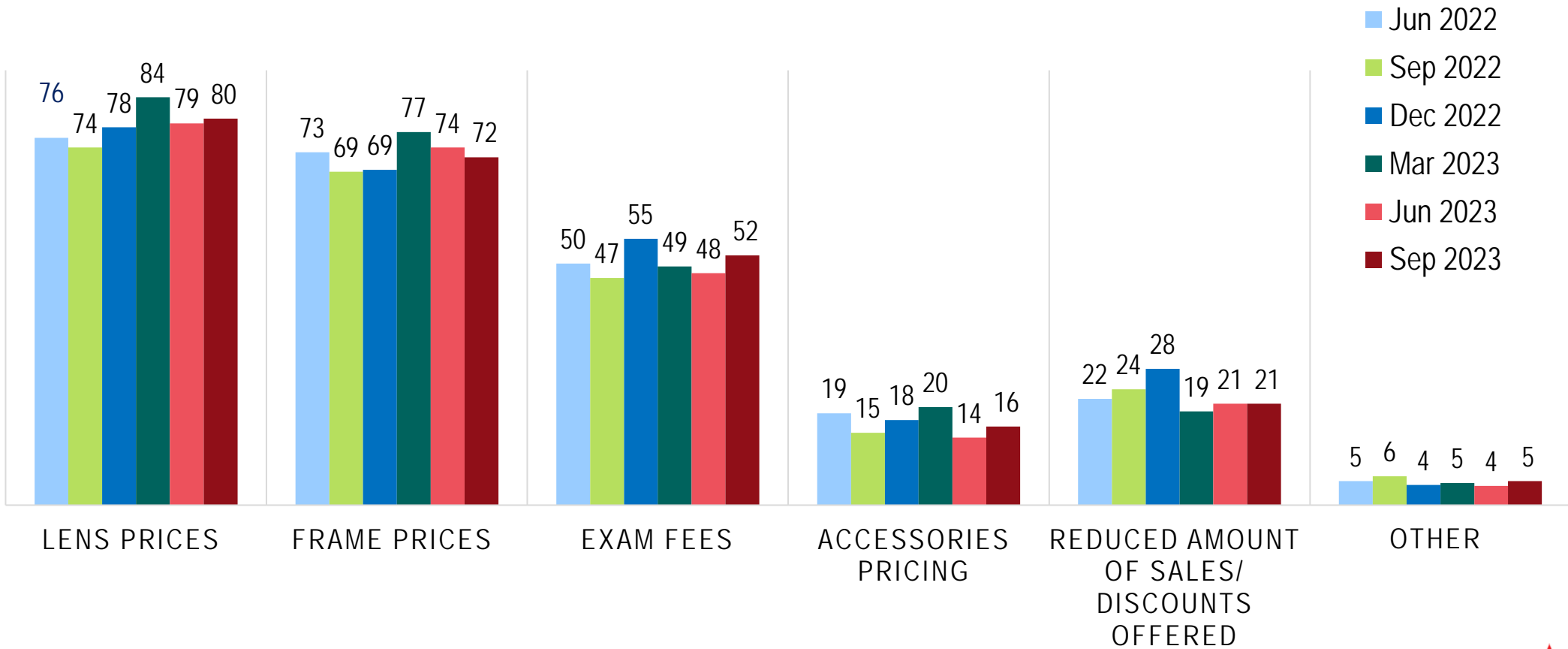
- No, we lowered prices
- No, Prices remain same
- Yes, in some areas
- Yes, across the board



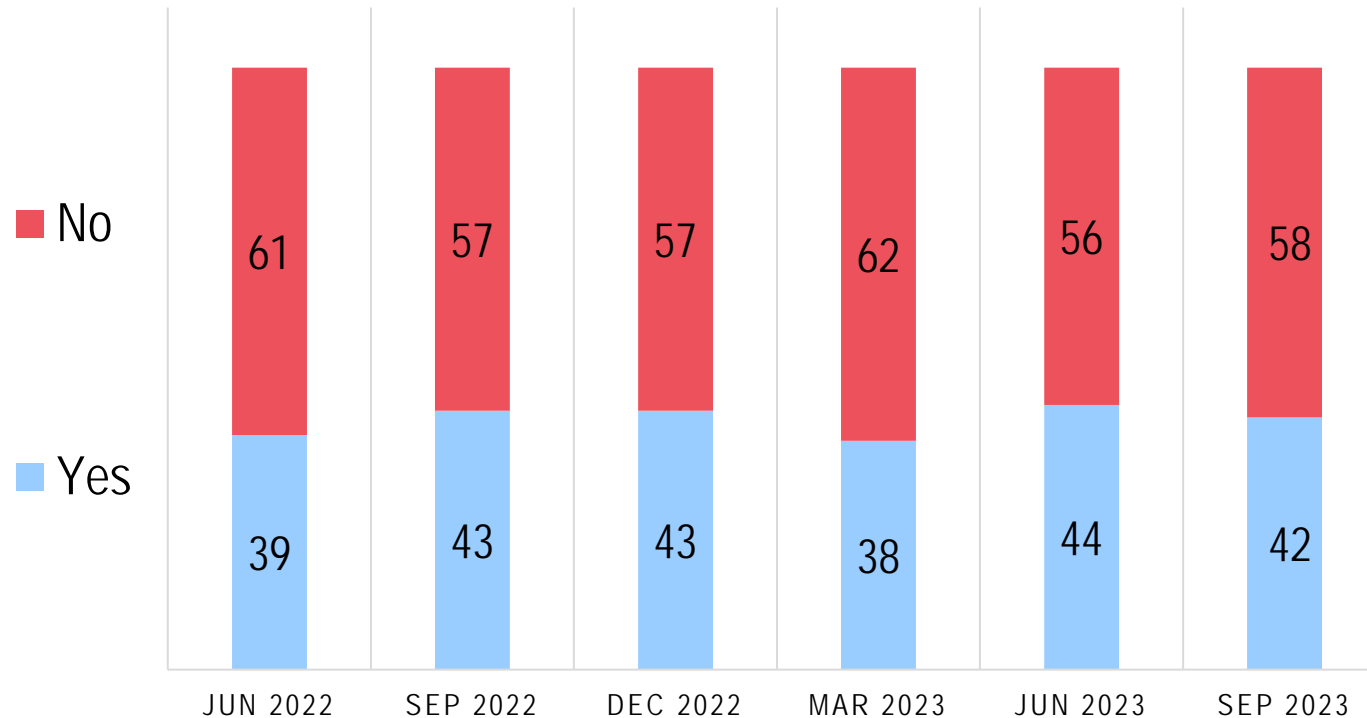
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If location has increased prices:

# WHERE HAVE YOU INCREASED PRICES?



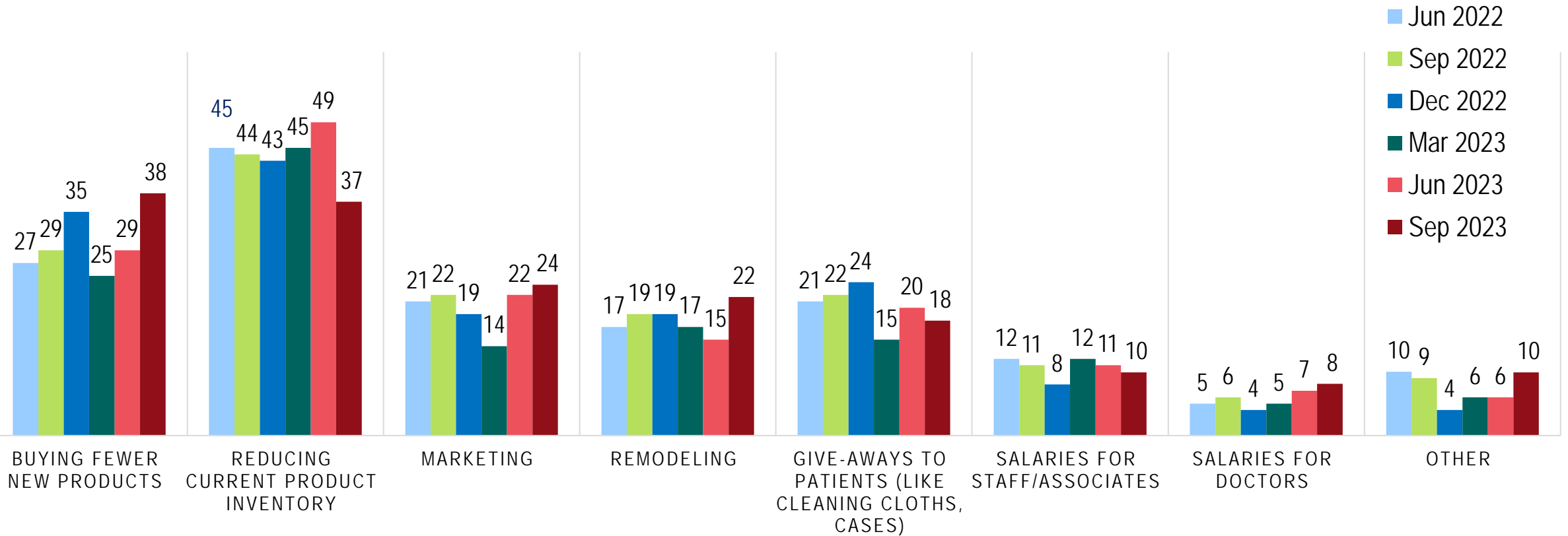
# DID YOUR PRACTICE CUT COSTS THIS YEAR?



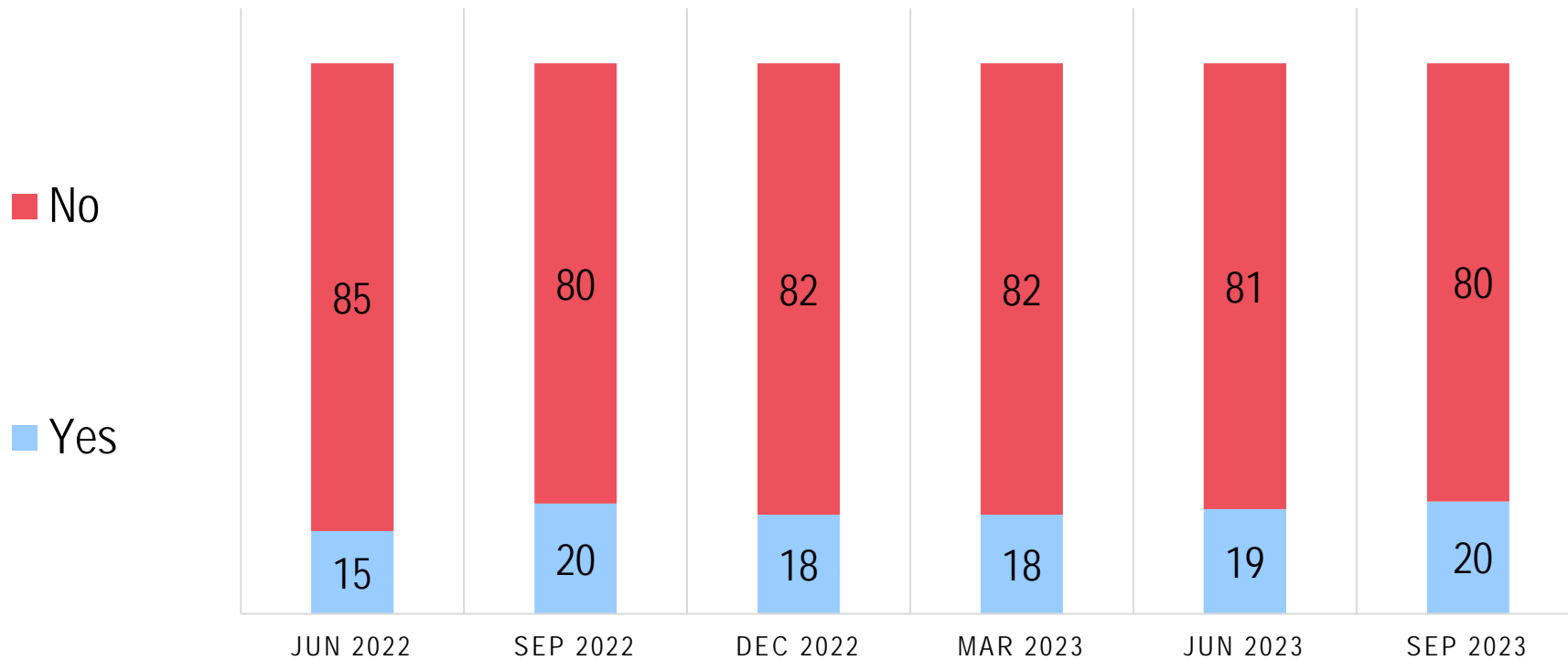
If practice cut costs:

# WHERE HAS YOUR PRACTICE CUT COSTS?

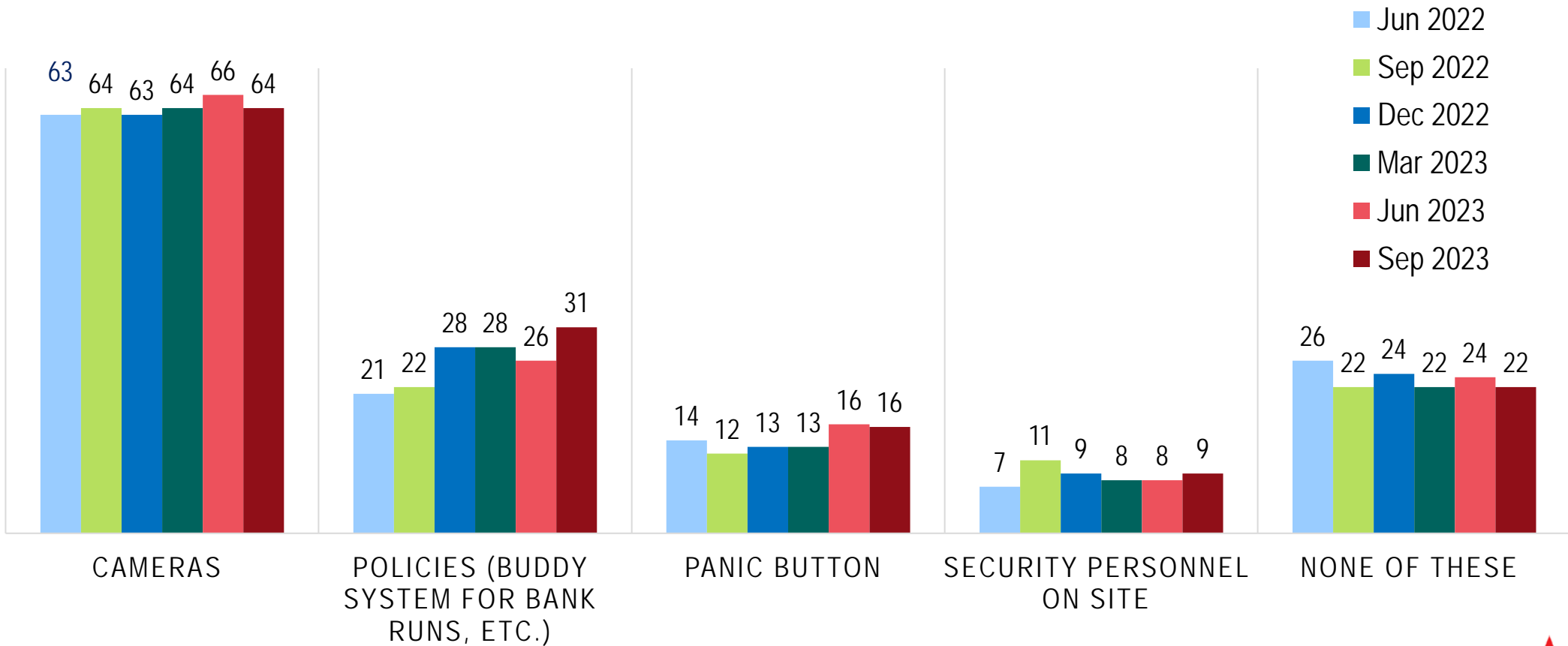
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# DOES YOUR PRACTICE CHARGE A LATE FEE FOR NO SHOWS OR LATE CANCELLATIONS?



# WHAT SECURITY MEASURES DOES YOUR PRACTICE EMPLOY?

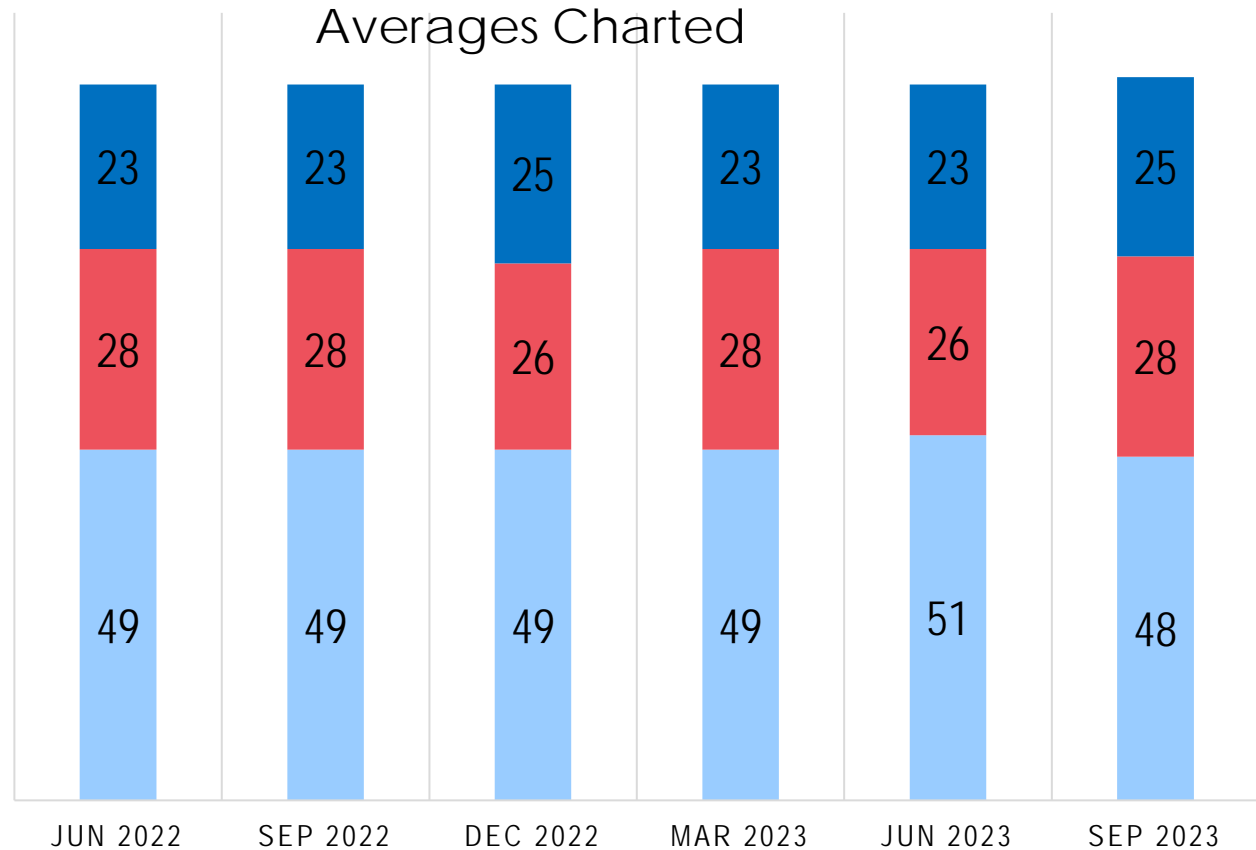


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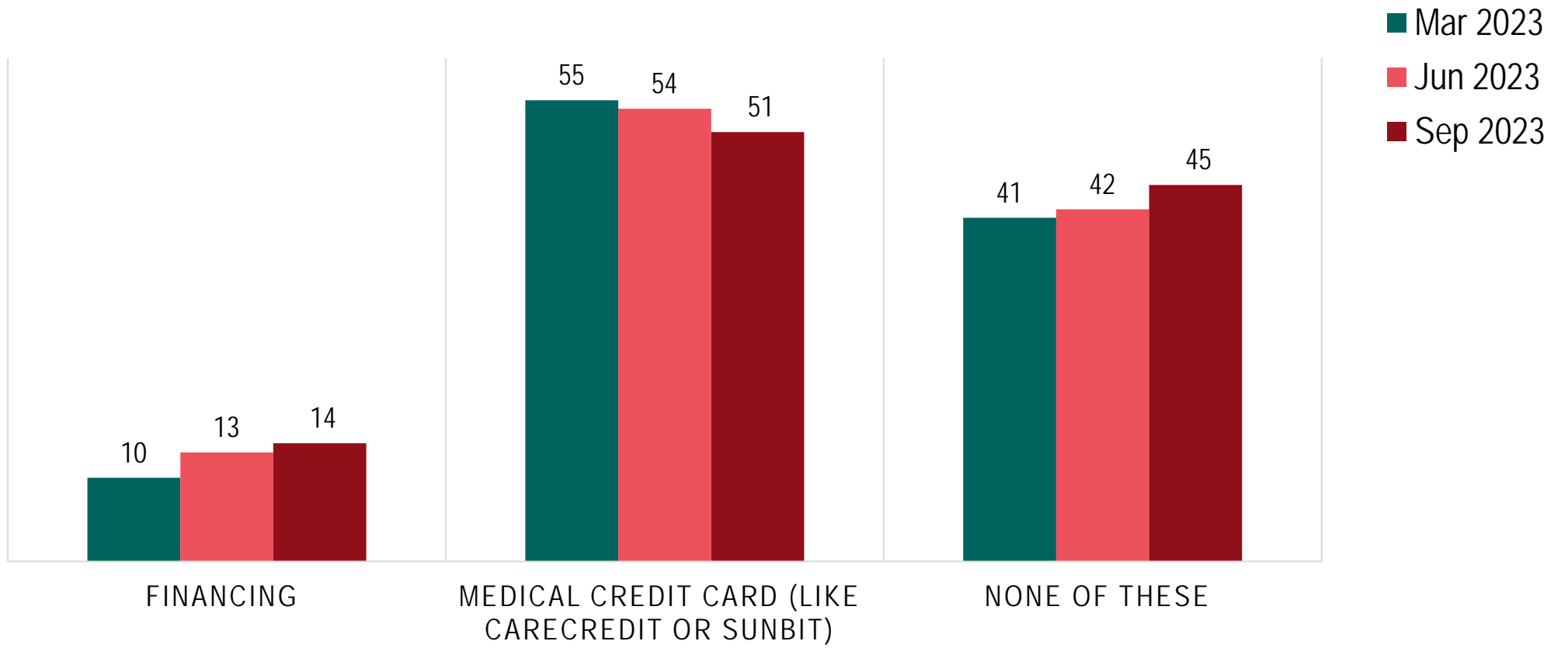


# WHAT PERCENT OF YOUR LOCATION'S GROSS REVENUES COMES FROM THE FOLLOWING:

- Services that are not covered by managed vision care or the patients' medical insurance
- Medical carrier reimbursements/co-pays of medical services
- Providing comprehensive, routine exams and related sales



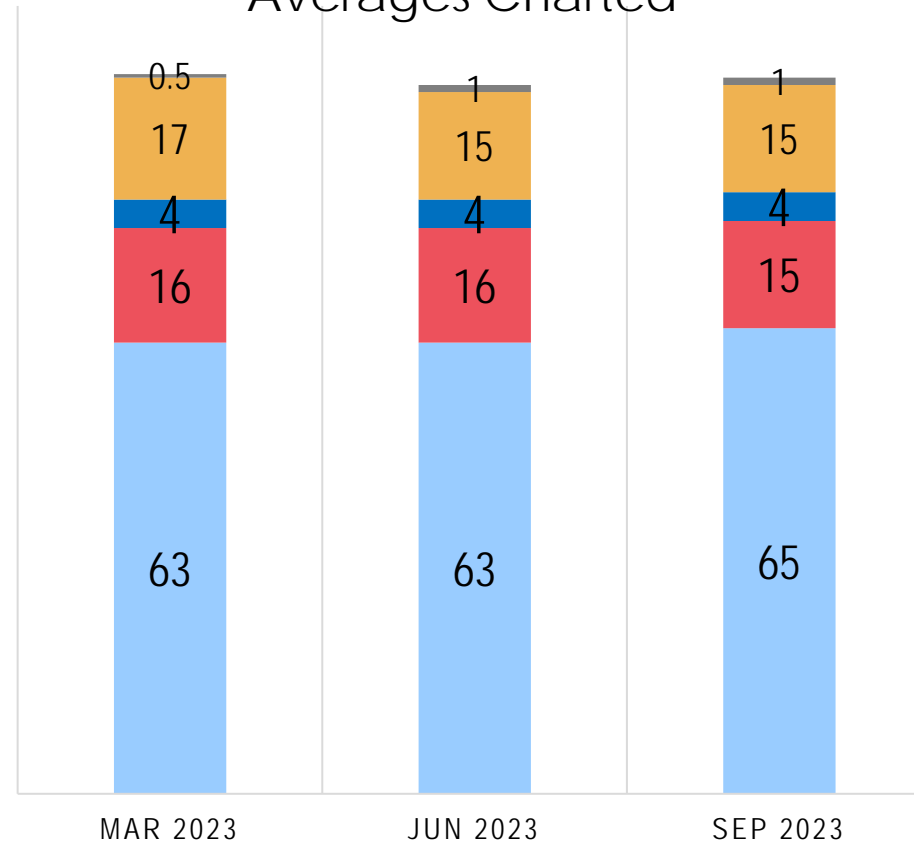
# WHICH OF THE FOLLOWING DOES YOUR PRACTICE OFFER?



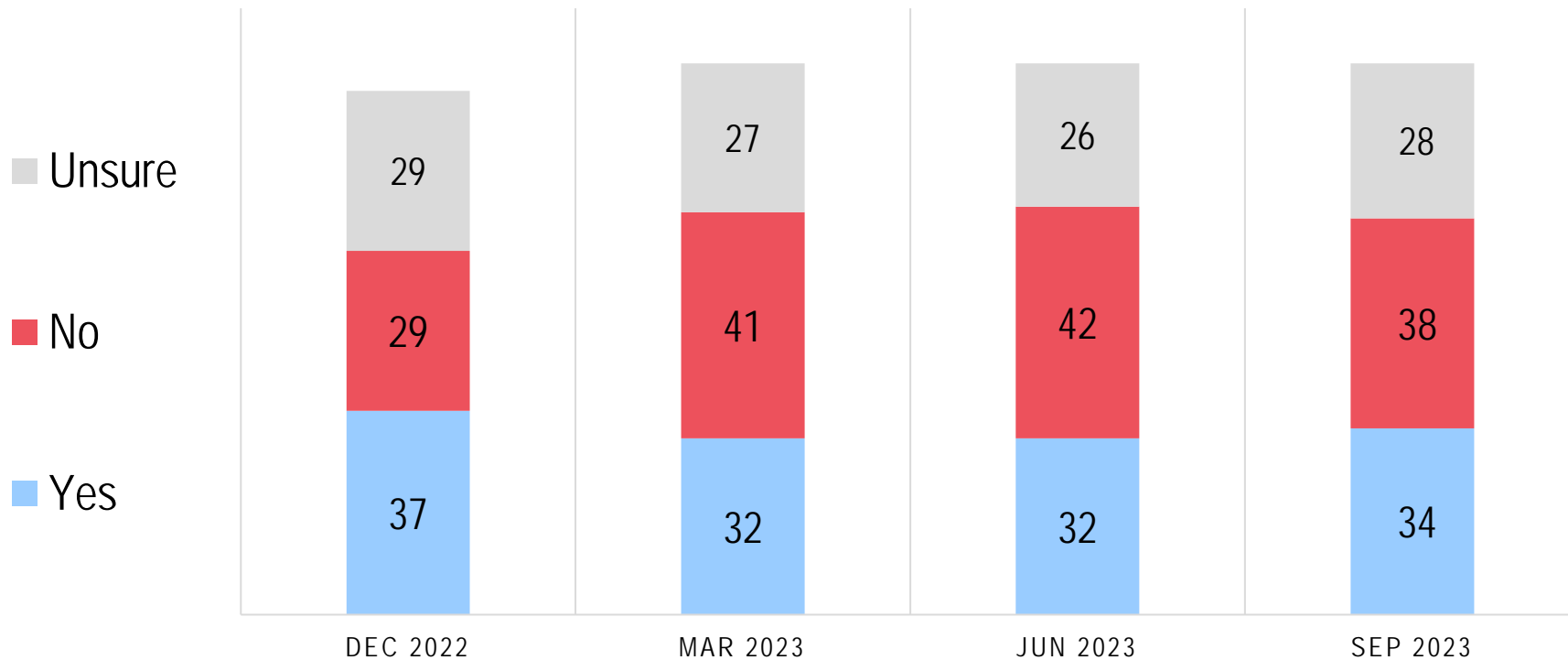
# WHAT PERCENT OF YOUR PATIENTS USE THE FOLLOWING FOR OUT-OF-POCKET COSTS?

- Financing
- Cash/Check
- Medical Credit Card (i.e. CareCredit, Sunbit)
- FSA or HAS
- Regular Credit Card (i.e. Visa, Amex)

Averages Charted

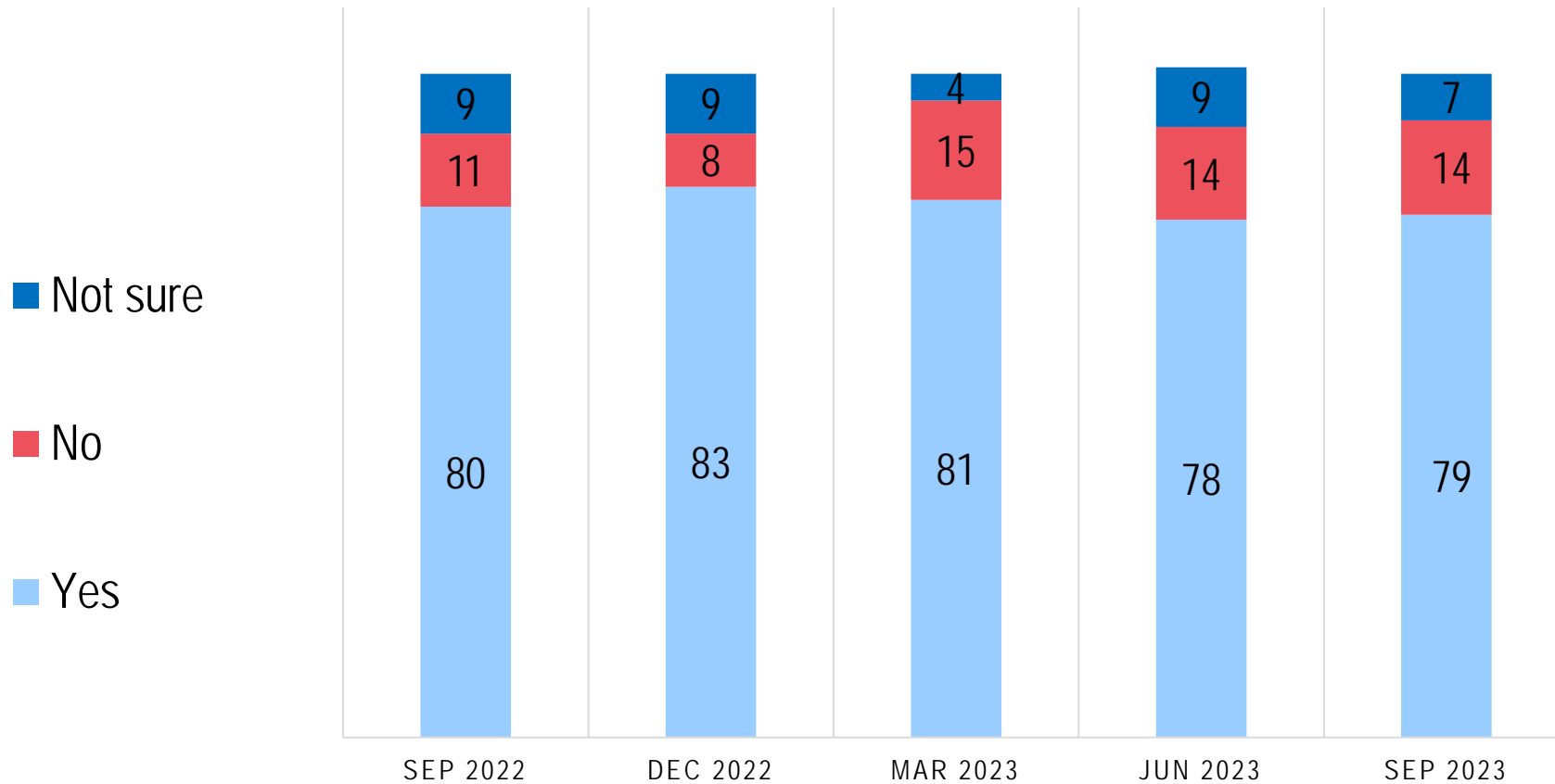


# SO FAR THIS YEAR, DID MORE OF YOUR PATIENTS USE MANAGED VISION CARE THAN PREVIOUS YEARS?

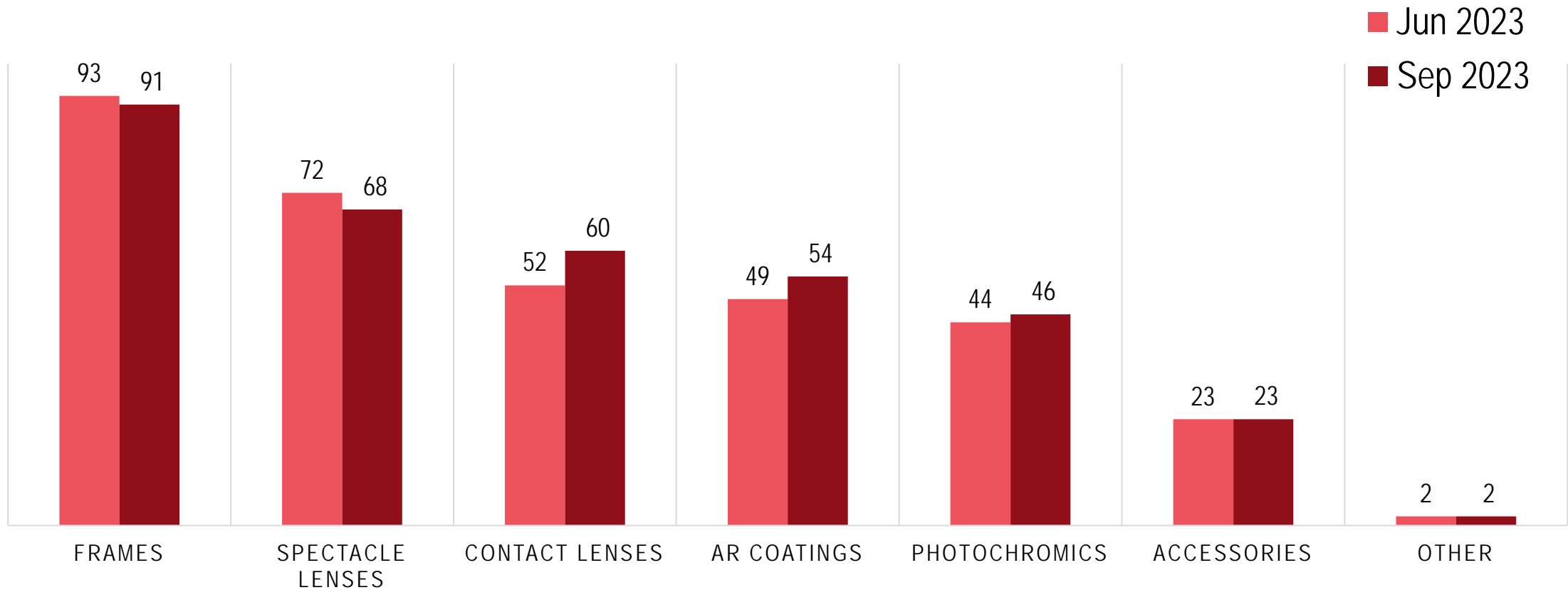


# ECPS & THEIR PATIENTS

# HAVE YOU NOTICED PATIENTS TRYING TO SAVE MONEY DUE TO INFLATION?



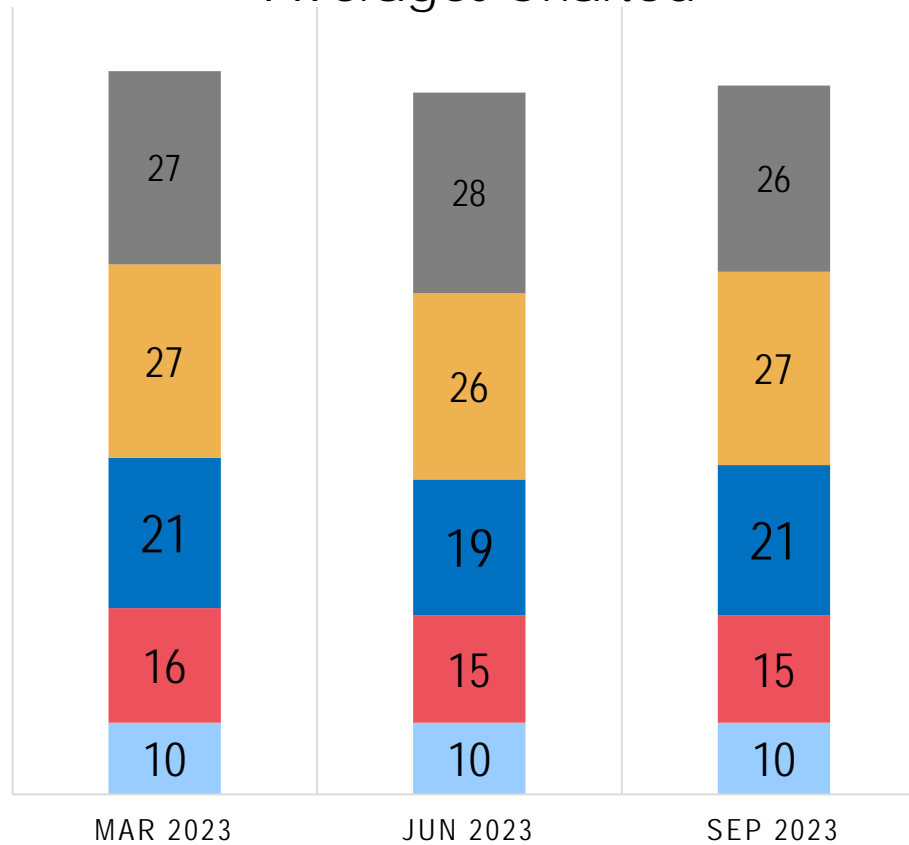
# IN WHICH OF THE FOLLOWING AREAS ARE PATIENTS TRYING TO SAVE?



# WHAT PERCENT OF YOUR PATIENTS FALL INTO THE FOLLOWING AGE BRACKETS?

- 65 and older
- 45 to 64
- 35 to 44
- 17 to 34
- Under 16

Averages Charted





# PATIENT VOLUME & PROFITABILITY

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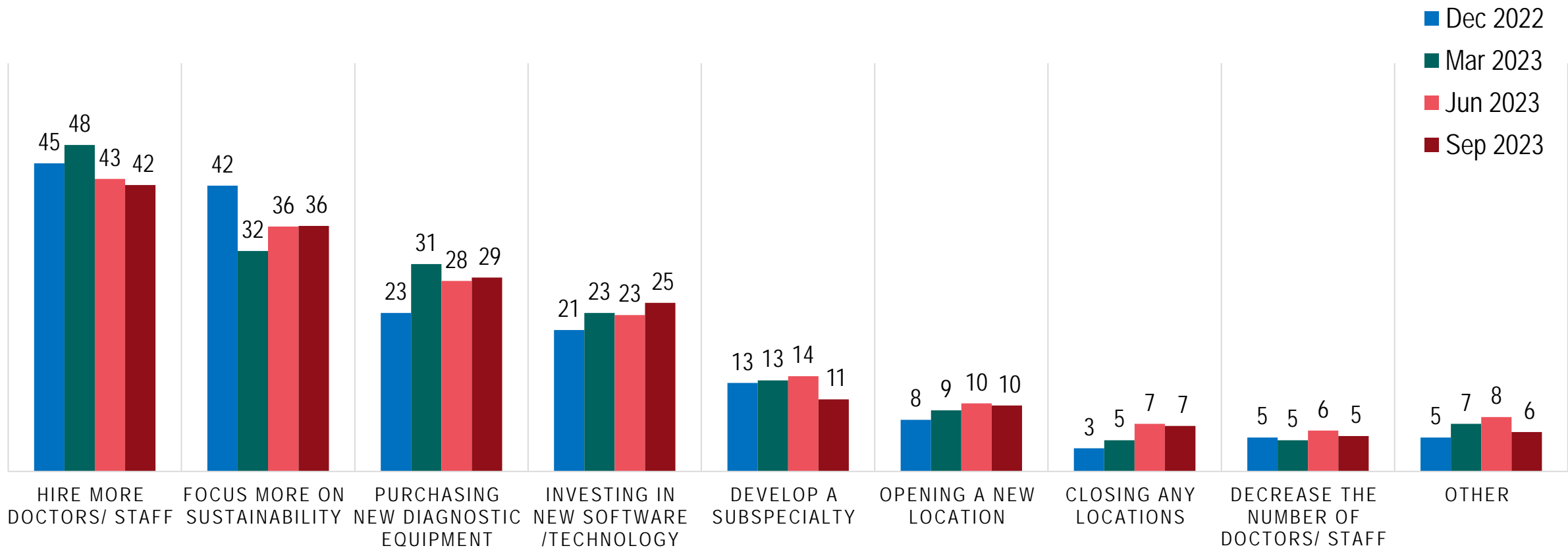
	Year 2022 vs Year 2021	Q1 2023 vs Q1 2022	Q2 2023 vs Q2 2022	Q3 2023 vs Q3 2022
PROFITABILITY PER PATIENT	+2%	+1%	+1%	+1%
# PATIENTS PER DAY	+6%	+3%	+3%	=
REVENUE	+5%	+3%	+1%	+2%
OPTICAL SALES	+4%	+2%	+2%	+1%
CAPTURE RATE	+1%	+1%	=	=

Mar 2023  
Average  
Capture Rate:  
66%

Jun 2023  
Average  
Capture Rate:  
60%

Sep 2023  
Average  
Capture Rate:  
65%

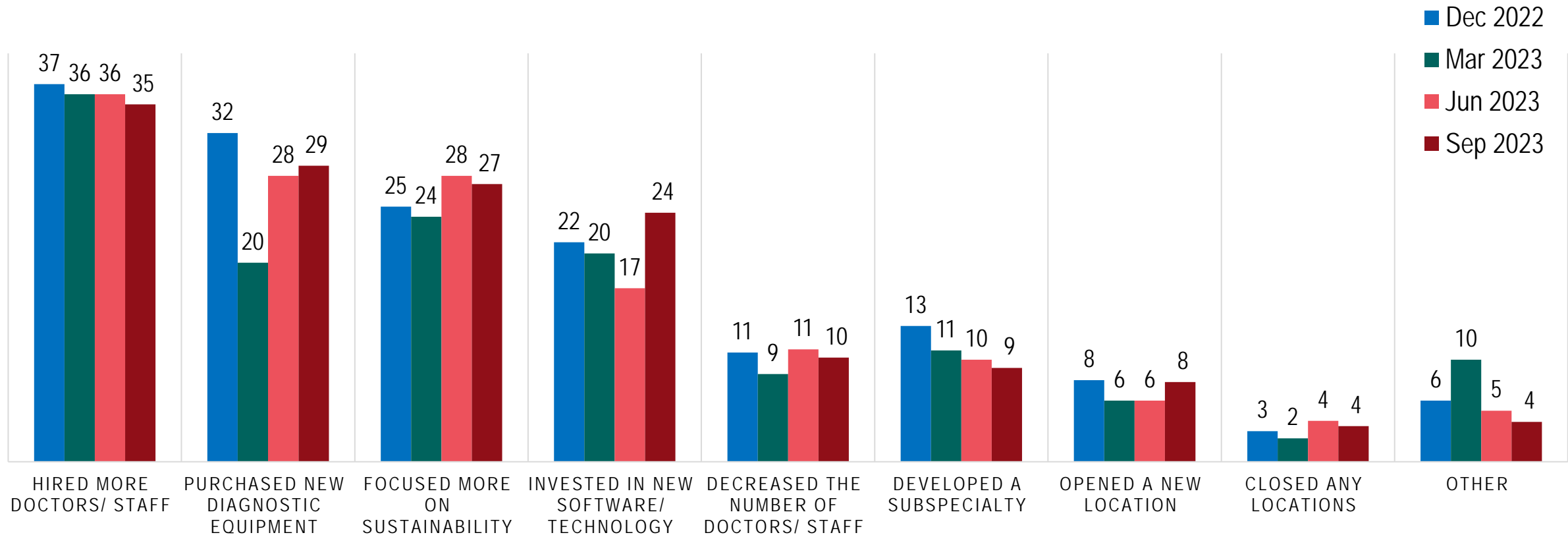
# DO YOU HAVE PLANS FOR ANY OF THE FOLLOWING IN 2023? *CHECK ALL THAT APPLY.*



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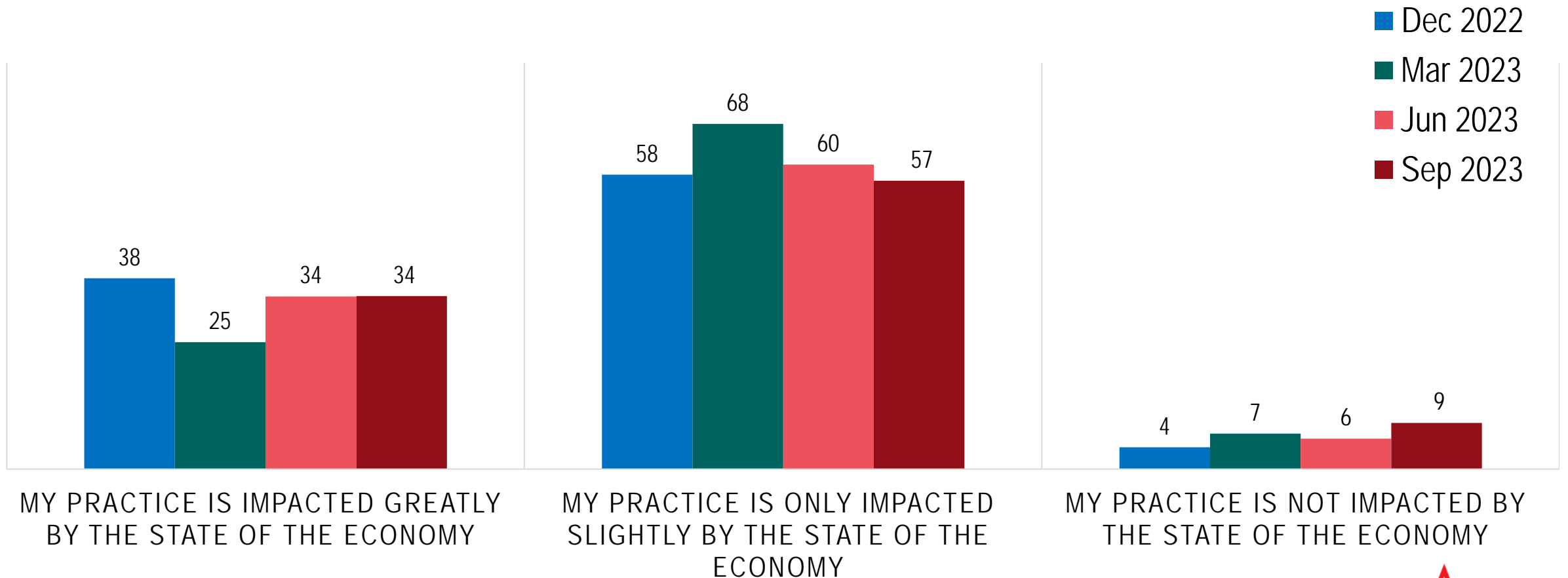
# DID YOU DO ANY OF THE FOLLOWING THIS YEAR?

CHECK ALL THAT APPLY.

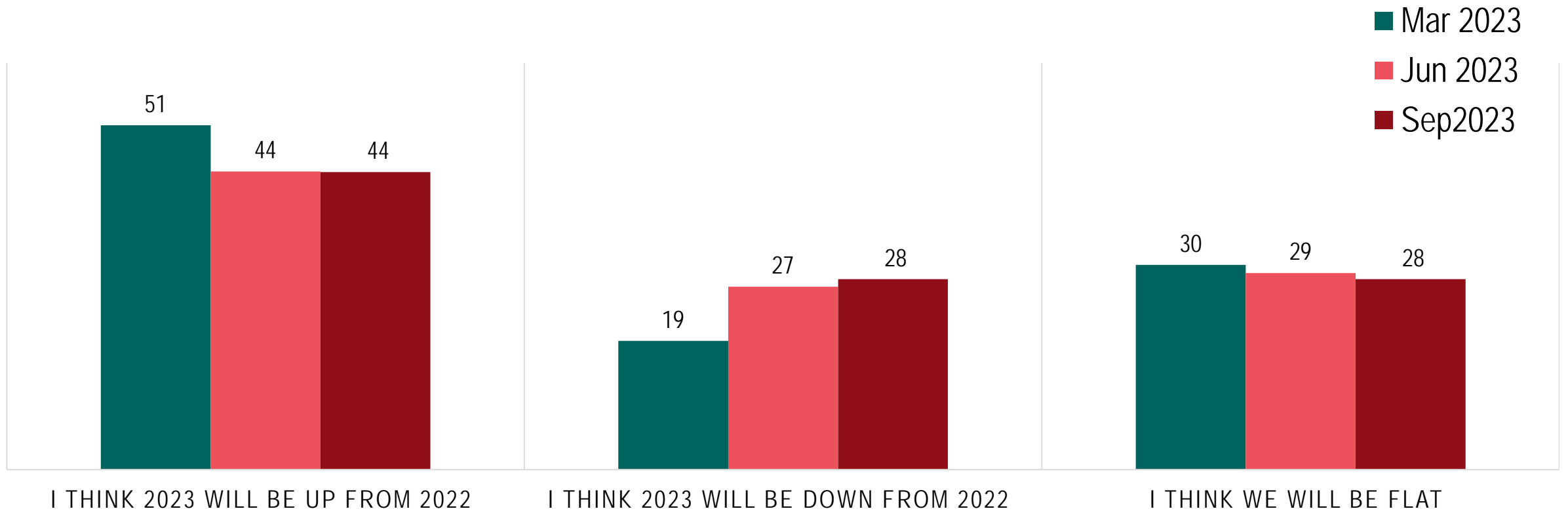


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# IN GENERAL, WHAT IMPACT DO YOU FEEL THE STATE OF THE ECONOMY HAS ON YOUR PRACTICE?

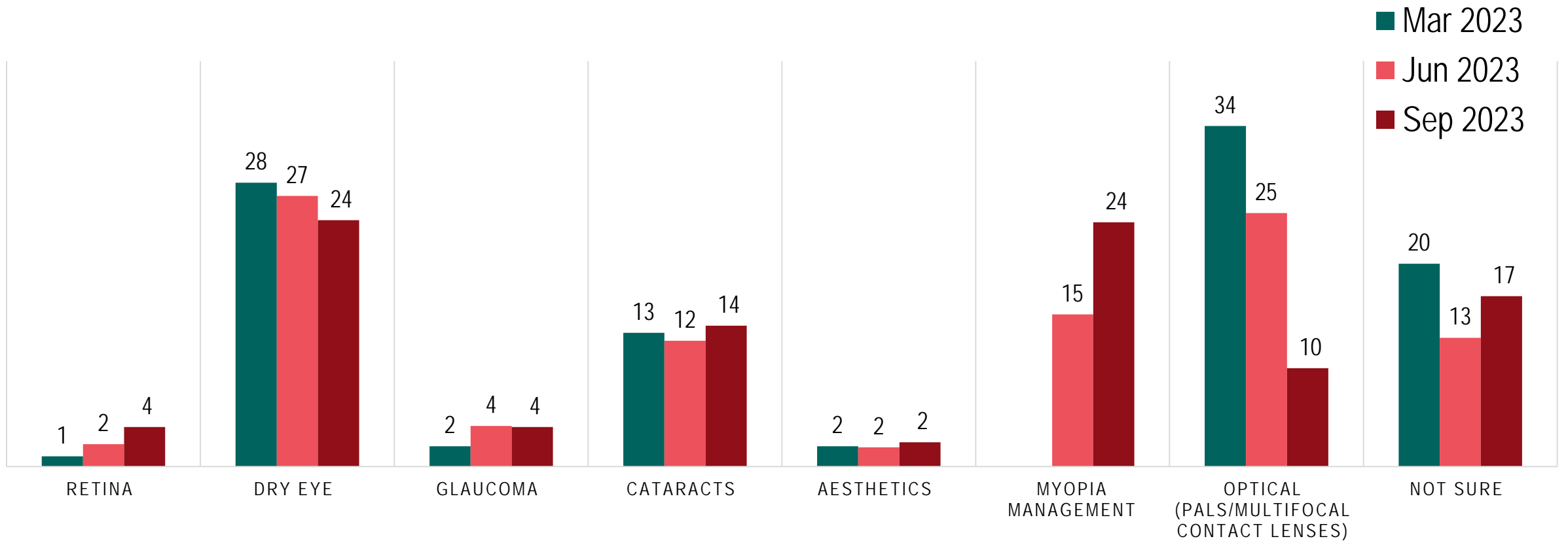


# HOW DO YOU FEEL 2023 WILL BE FOR YOUR BUSINESS COMPARED TO 2022?



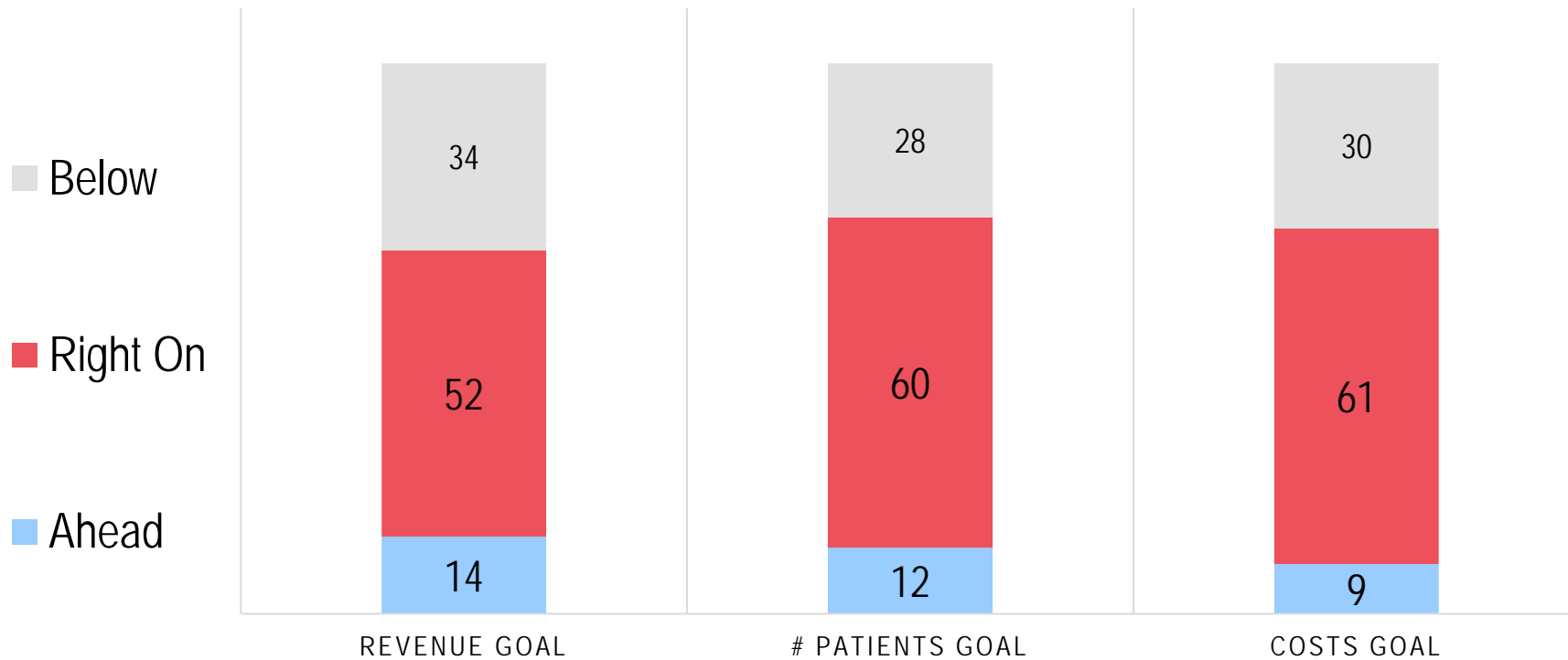
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# WHICH AREA BELOW DO YOU THINK WILL HAVE THE GREATEST PATIENT INCREASE?



# ARE YOU ON TRACK TO MEET YOUR 2023 GOALS IN THE FOLLOWING AREAS?

Sep 2023



PERCENT