

# Optical Consumer Insights During COVID-19

Nathan Troxell, Wednesday, January 27, 2021



AN **OPTIMISTIC**  
*view of the* **FUTURE**

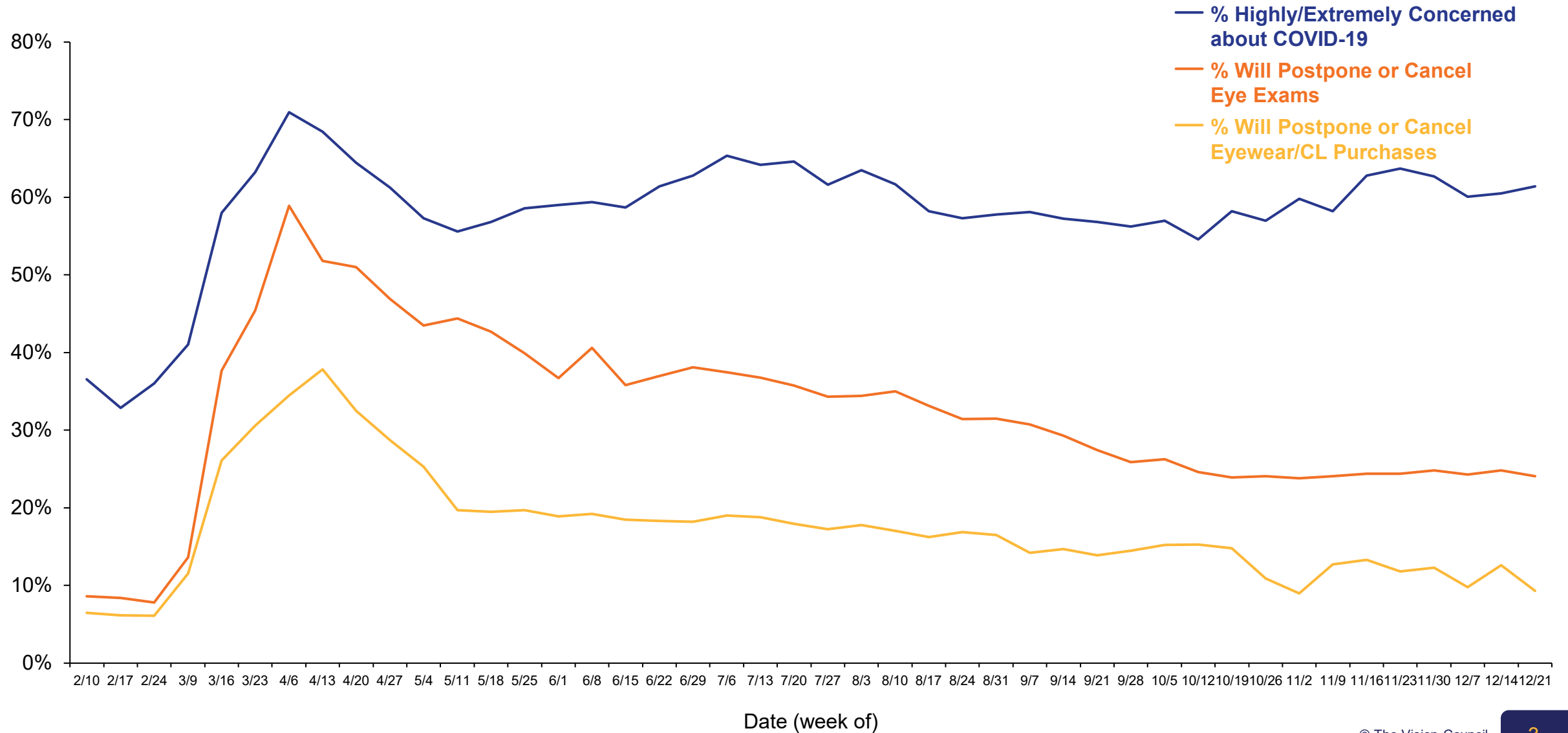
# VisionWatch COVID-19 Consumer Surveys

## Methodology:

- Custom consumer study conducted via The Vision Council's VisionWatch Survey Program
- Questions appended to the end of the VisionWatch surveys, allowing segmentation and cross-tabs based on vision care, eye exam, and optical product purchase behaviors
- Fielded to a demographically balanced sample over the internet total sample
- More than 80,000 interviews have been conducted since February (n = 80,438)

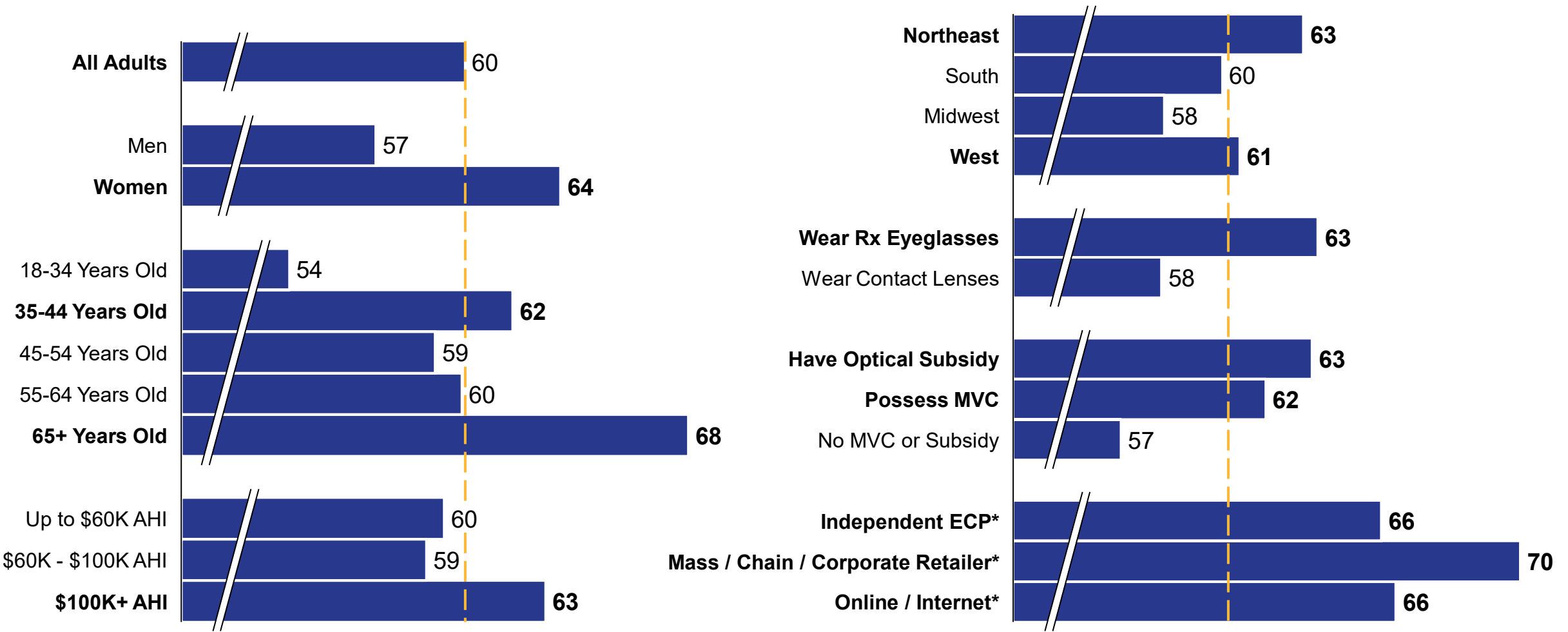
<u>Wave</u>	<u>Dates</u>	<u>Sample size</u>
February	2/10 – 2/27	n = 10,416
March	3/10 – 3/26	n = 10,312
April	4/8 – 4/30	n = 10,389
May	5/1 – 5/31	n = 10,325
June	6/2 – 6/30	n = 10,364
July	7/1 – 7/31	n = 4,922
August	8/1 – 8/31	n = 4,936
September	9/1 – 9/30	n = 4,942
October	10/1 – 10/31	n = 3,949
November	11/1 – 11/30	n = 4,932
December	12/1 – 12/31	n = 4,951

# Consumer concern about COVID-19 has impacted patient eye exam and optical product purchase behavior



# Patient segments that are highly- to extremely- concerned about COVID-19

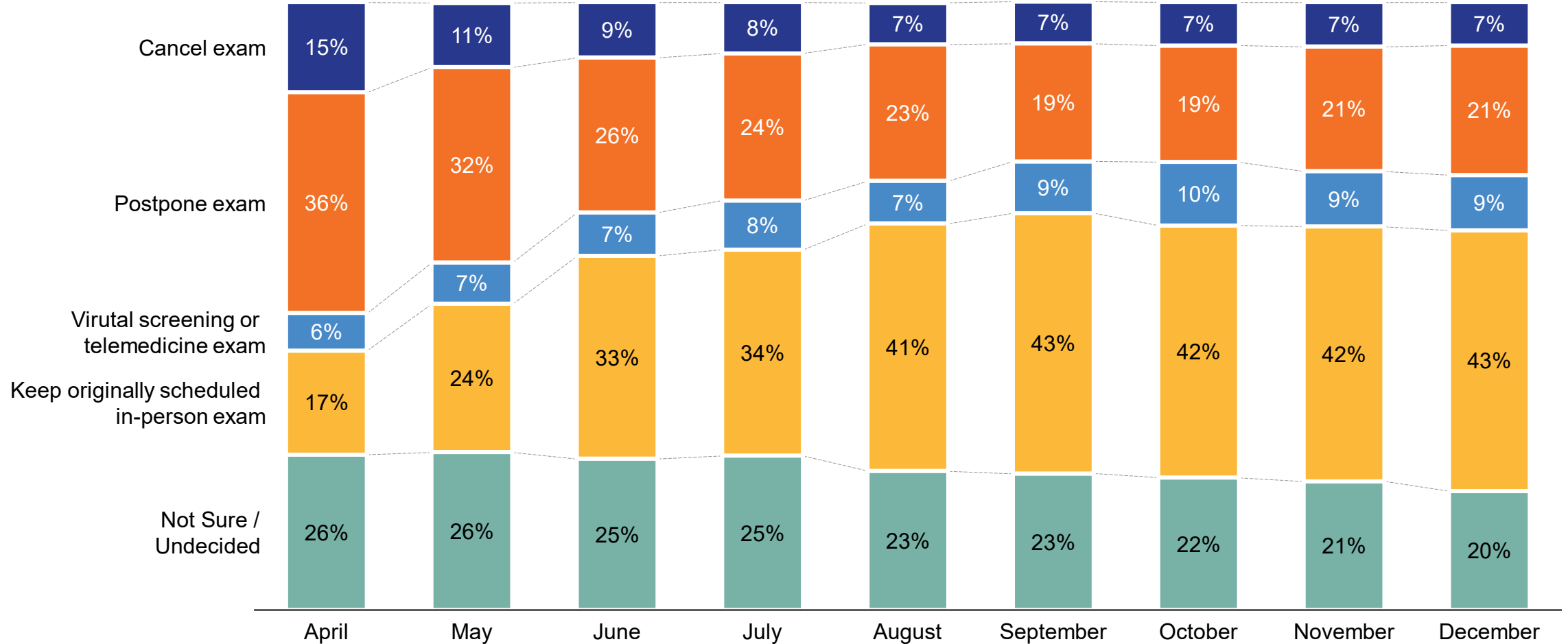
On a scale of 1-10 how concerned are you over the recent global coronavirus threat and outbreak?<sup>1</sup>  
 % of respondents<sup>2</sup>



<sup>1</sup>Rated from 1 "no concern at all" to 10 "extremely concerned." <sup>2</sup>Respondents answering 8, 9, 10. \*By location of last Rx eyewear purchase. Source: The Vision Council VisionWatch COVID-19 US Consumer Study, 12/1 - 12/31/2020, n = 4,951

# While patients have recently become more comfortable attending in-person eye exam appointments, exam behavior patterns have plateaued in recent months

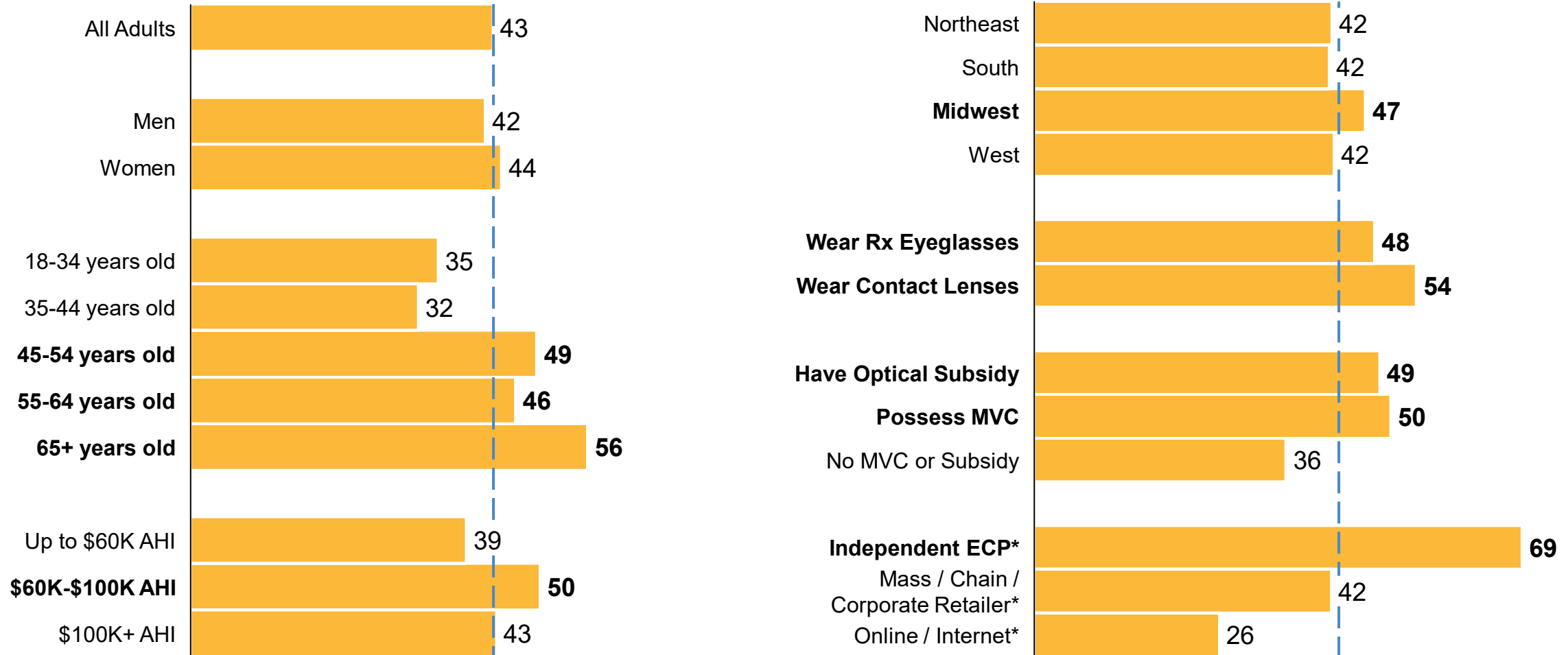
Will you postpone or cancel any eye exams or trips to the eye doctor while coronavirus is still a threat?  
% of respondents<sup>1</sup>



<sup>1</sup>Figures may not sum to 100% because of rounding.  
Source: The Vision Council VisionWatch COVID-19 US Consumer Study, April – December 2020, n = 59,710

# Nearly half of all patients now indicated that they will keep their in-person eye exams during COVID-19

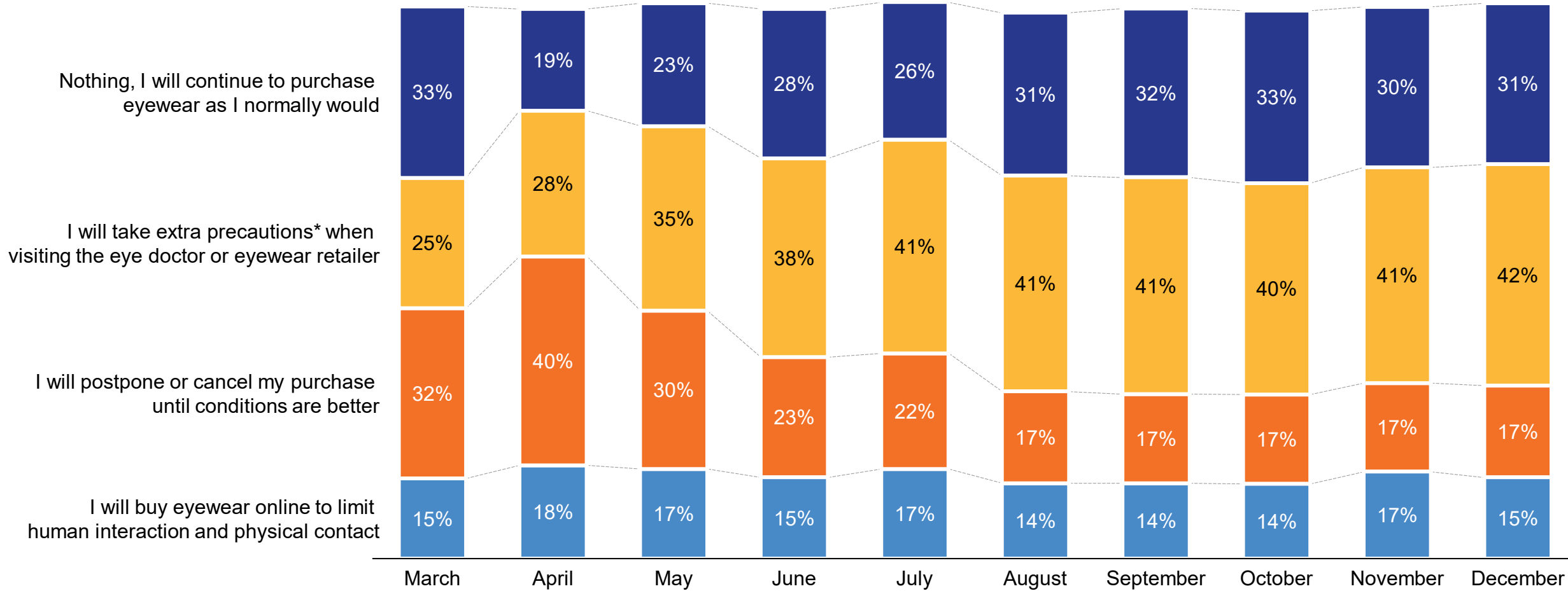
Will you *keep your originally scheduled exam* or trip to the eye doctor while COVID-19 is still a threat?  
 % of respondents<sup>1</sup>



<sup>1</sup>Figures will not sum to 100%, because other answer options removed. \*By location of last Rx eyewear purchase.  
 Source: The Vision Council VisionWatch COVID-19 US Consumer Study, 12/1 – 12/31/2020, n = 4,951

# Consumers are adjusting optical buying behavior by taking extra precautions when shopping in-person

If you need new eyeglasses or contact lenses while coronavirus is still a threat, which of the following actions are you likely to take?  
% of respondents<sup>1</sup>

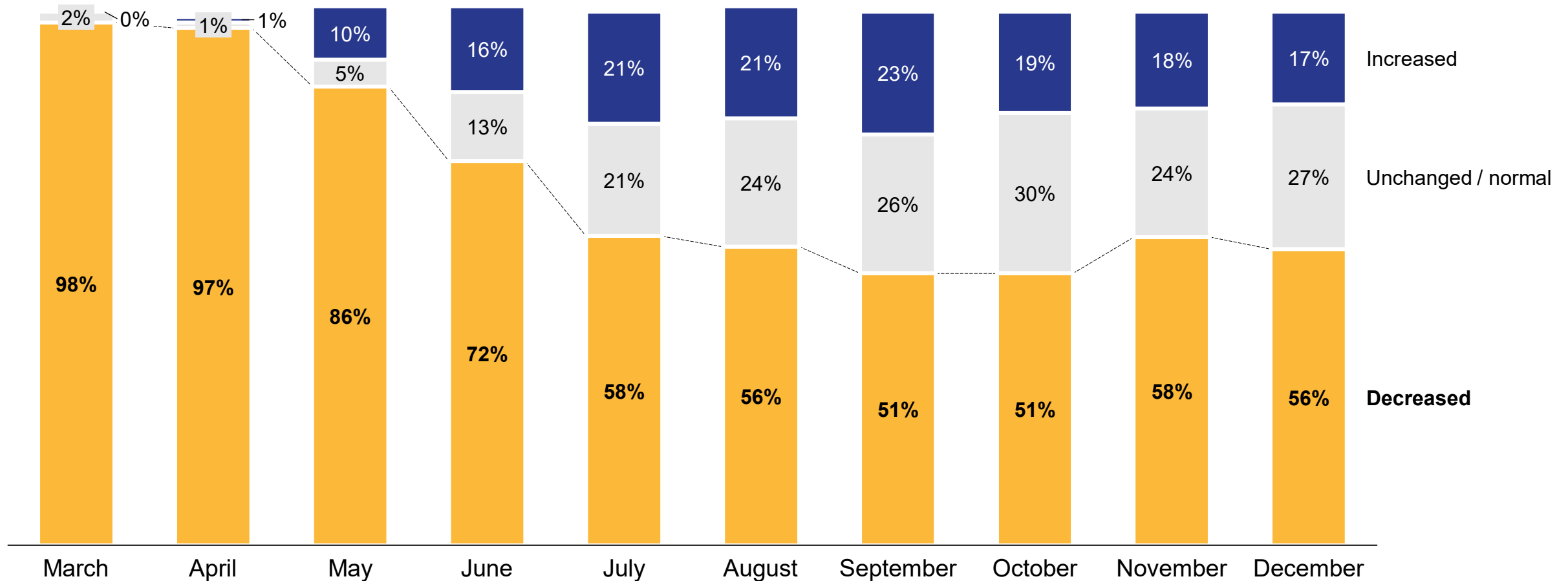


<sup>1</sup>Figures will not sum to 100%, because multiple selections allowed. "Other" response removed. \*extra handwashing or wearing a face mask  
Source: The Vision Council VisionWatch COVID-19 US Consumer Study, March – December 2020, n = 51,363

# Patient volume is still depressed overall, but the decrease is less significant than in previous months

How would you describe the number of customers / patients your location served within the last week compared to a normal week?

% of respondents<sup>1</sup>



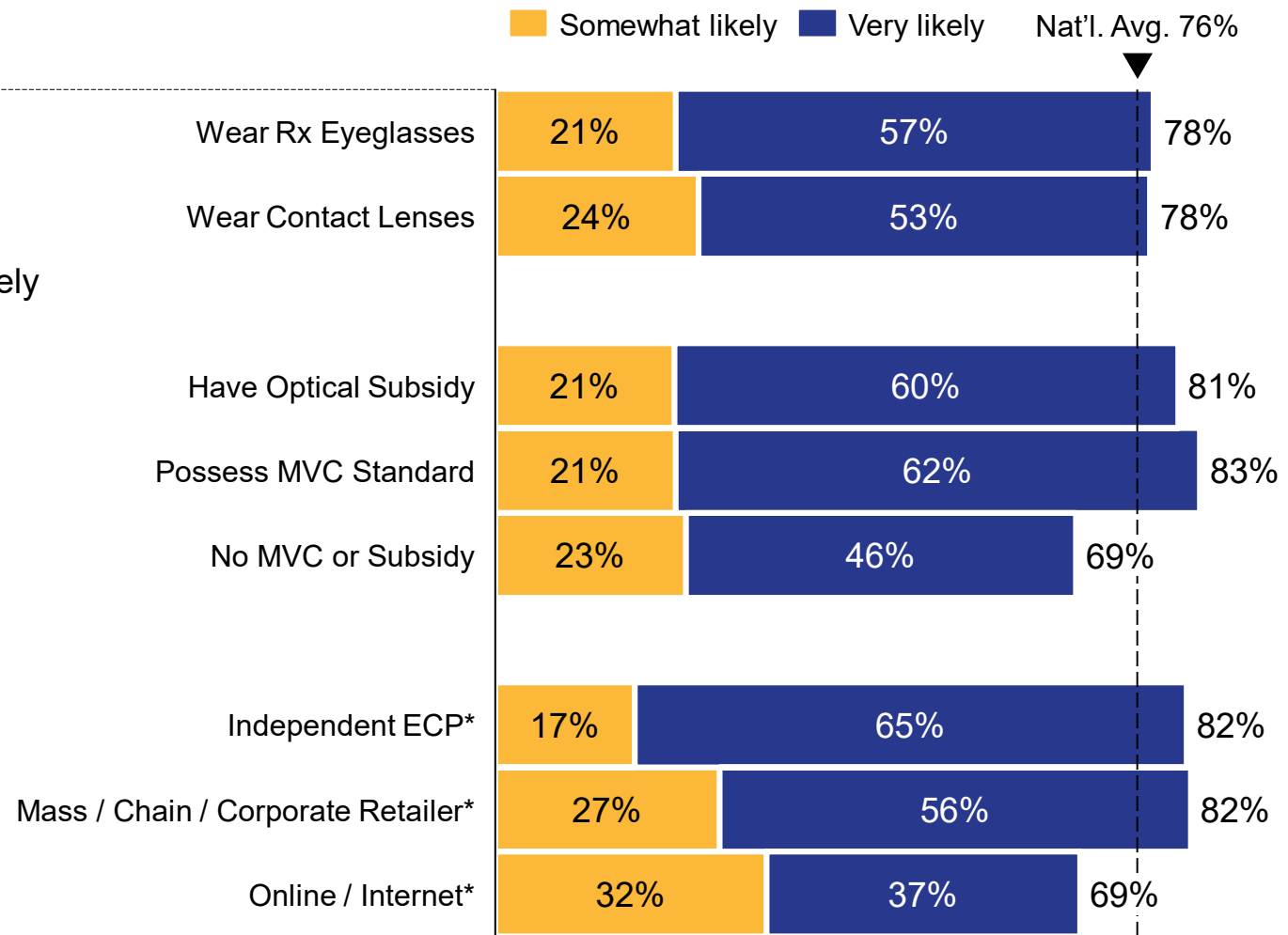
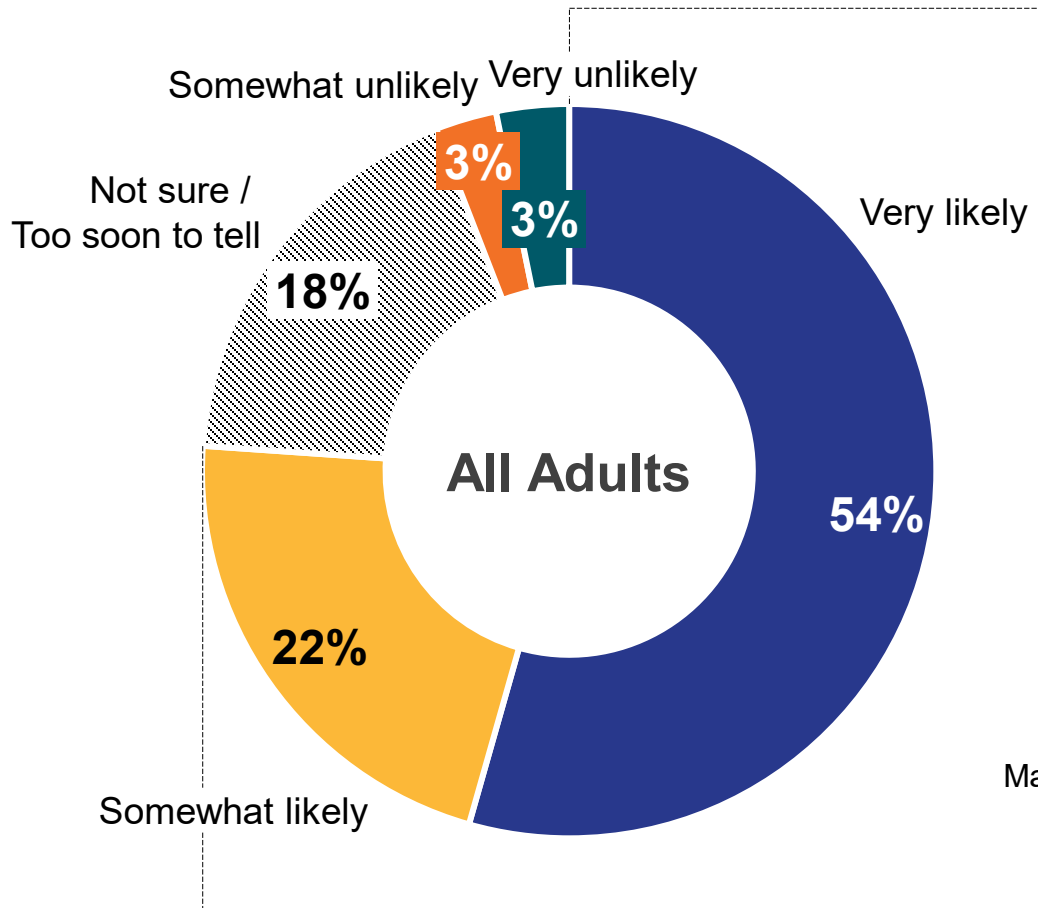
<sup>1</sup>Figures may not sum to 100%, because of rounding.  
Source: The Vision Council COVID-19 ECP Panel Study, 3/9/2020 – 12/31/2020, n = 5,449



# More than 75% of consumers indicate that they will likely return to physical eyewear retailers after COVID-19

After the COVID-19 crisis is over, how likely are you to return to a brick and mortar physical eyewear retailer to try on and purchase eyewear?

% of respondents<sup>1</sup>

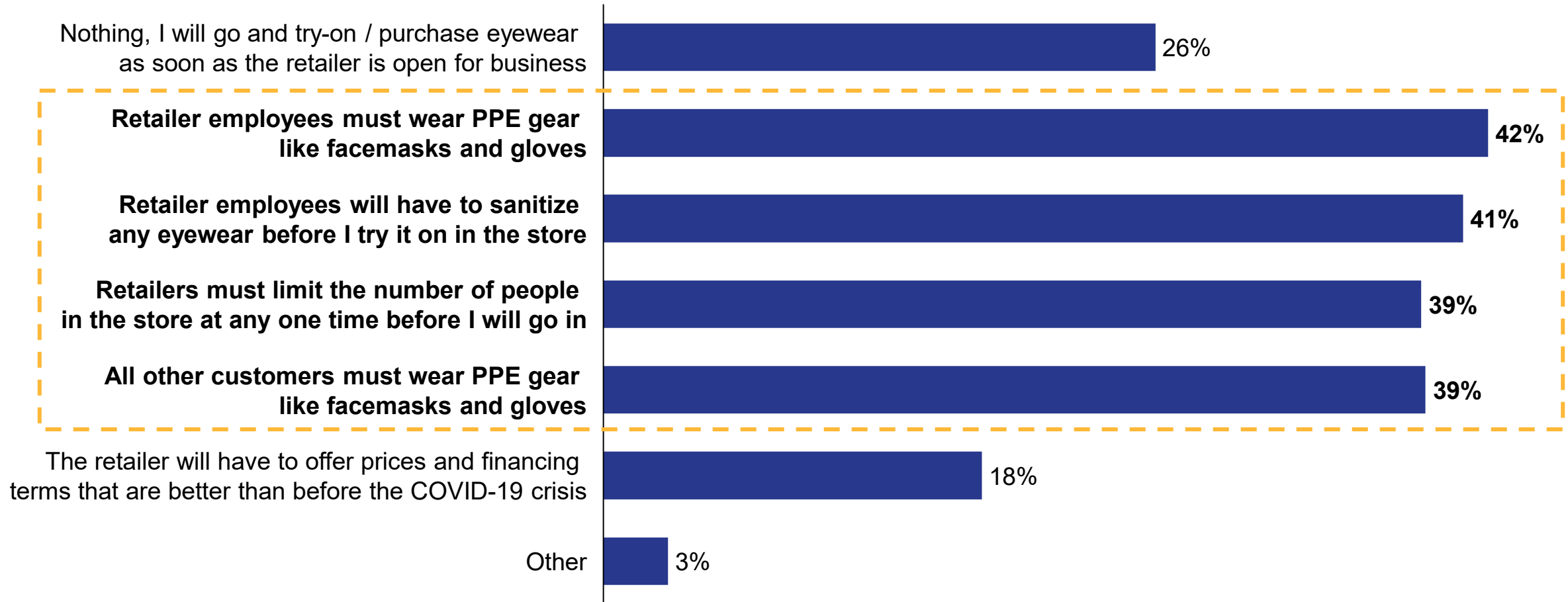


<sup>1</sup>Figures will not sum to 100%, because other answer options removed. \*By location of last Rx eyewear or optical product purchase. Source: The Vision Council VisionWatch COVID-19 US Consumer Study, September 2020, n = 3,762

# Consumers want PPE, safety precautions, sanitization and social distancing protocols to be comfortable in stores

Which of the situations below would encourage you to visit, try-on and purchase eyewear from a physical brick and mortar retailer?

% of respondents<sup>1</sup>



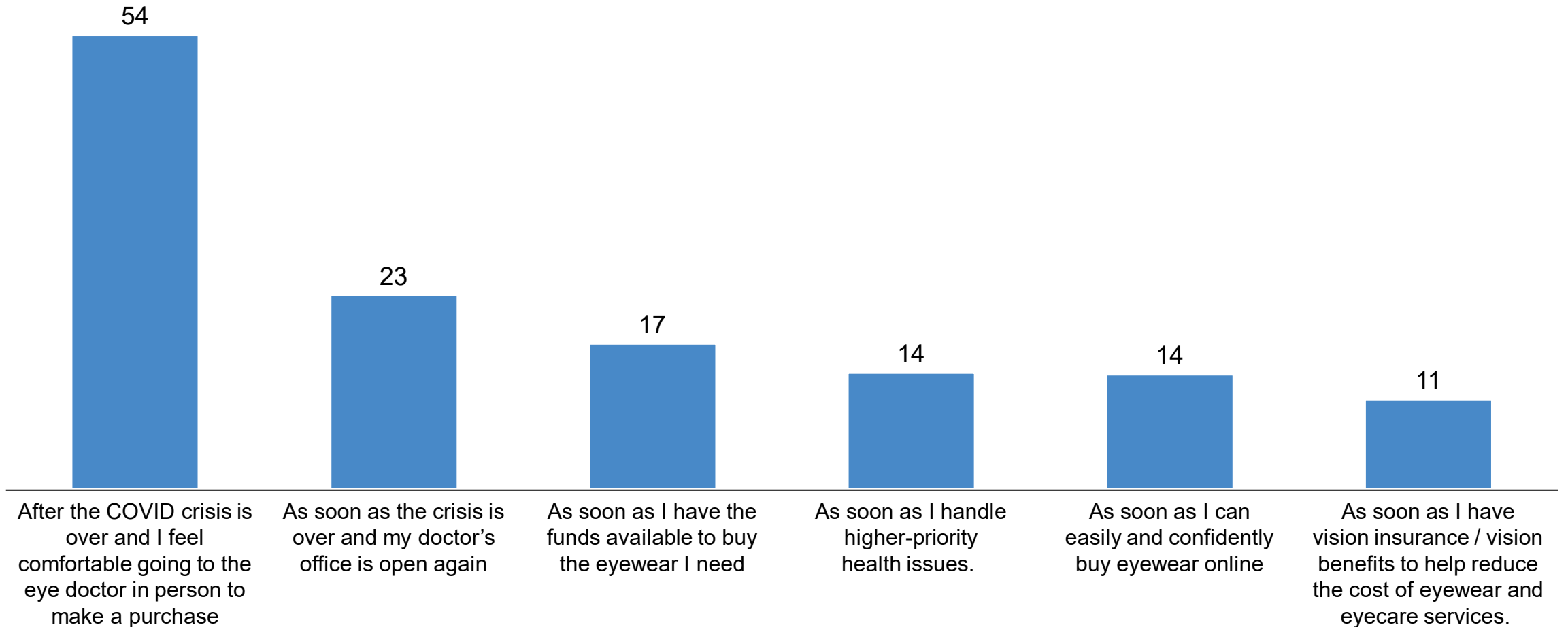
<sup>1</sup>Figures will not sum to 100%, because of multiple selections.

Source: The Vision Council VisionWatch COVID-19 US Consumer Study, September 2020, n = 7,880

# “Feeling comfortable” is the largest influence on patients returning to make a purchase after canceling or postponing due to COVID-19

When do you anticipate buying eyewear or contact lenses in the future if you are postponing purchases during the COVID-19 crisis?

% of respondents<sup>1</sup>



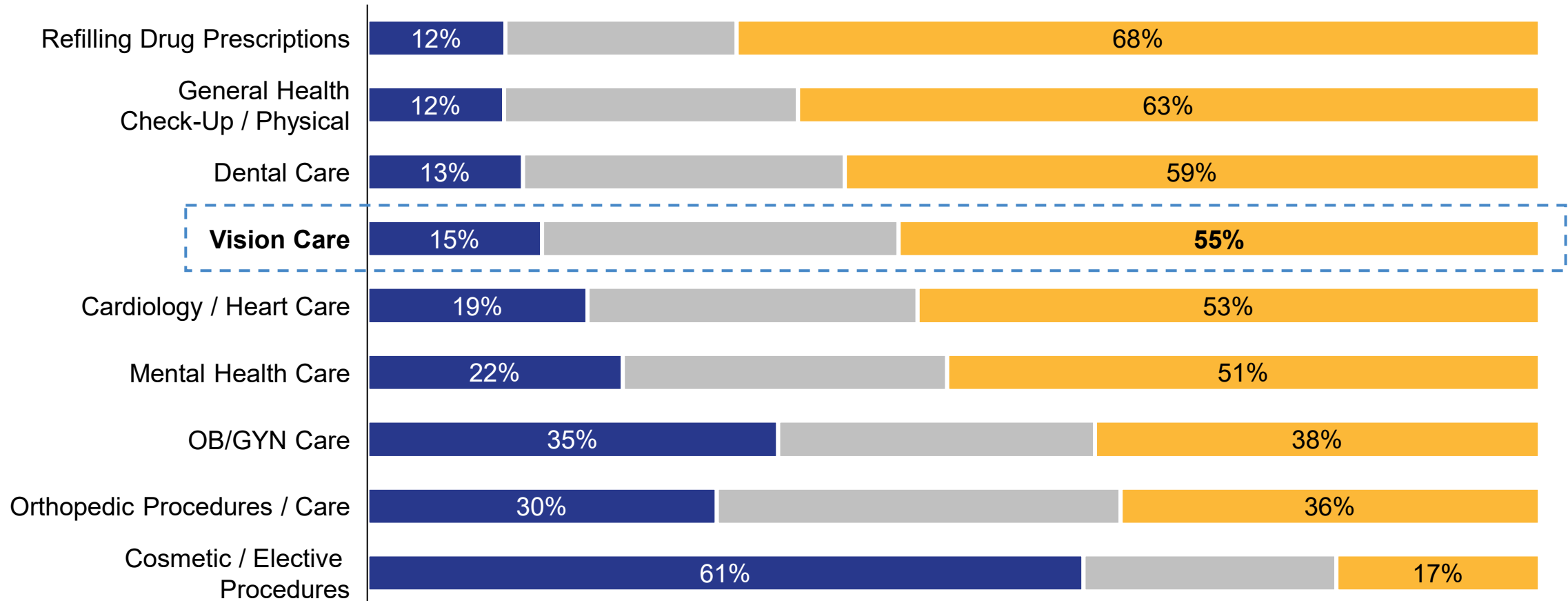
<sup>1</sup>Figures will not sum to 100%, because of multiple selections allowed.  
Source: The Vision Council VisionWatch COVID-19 US Consumer Study, September 2020, n = 787

# Americans rank Vision Care within top 5 health care priorities during COVID-19

As the COVID-19 crisis continues in the USA how are you prioritizing the following health care needs?

% of respondents<sup>1</sup>

■ Not Important ■ Neutral ■ Important



Q: As the COVID-19 crisis continues in the USA how are you prioritizing the following health care needs?  
Source: The Vision Council VisionWatch COVID-19 US Consumer Study, August-September 2020, n = 9,878

**Thank You**

