

Healthcare Behavior and Consumer Spending Insights During COVID-19

Nathan Troxell, Thursday, January 28, 2021



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

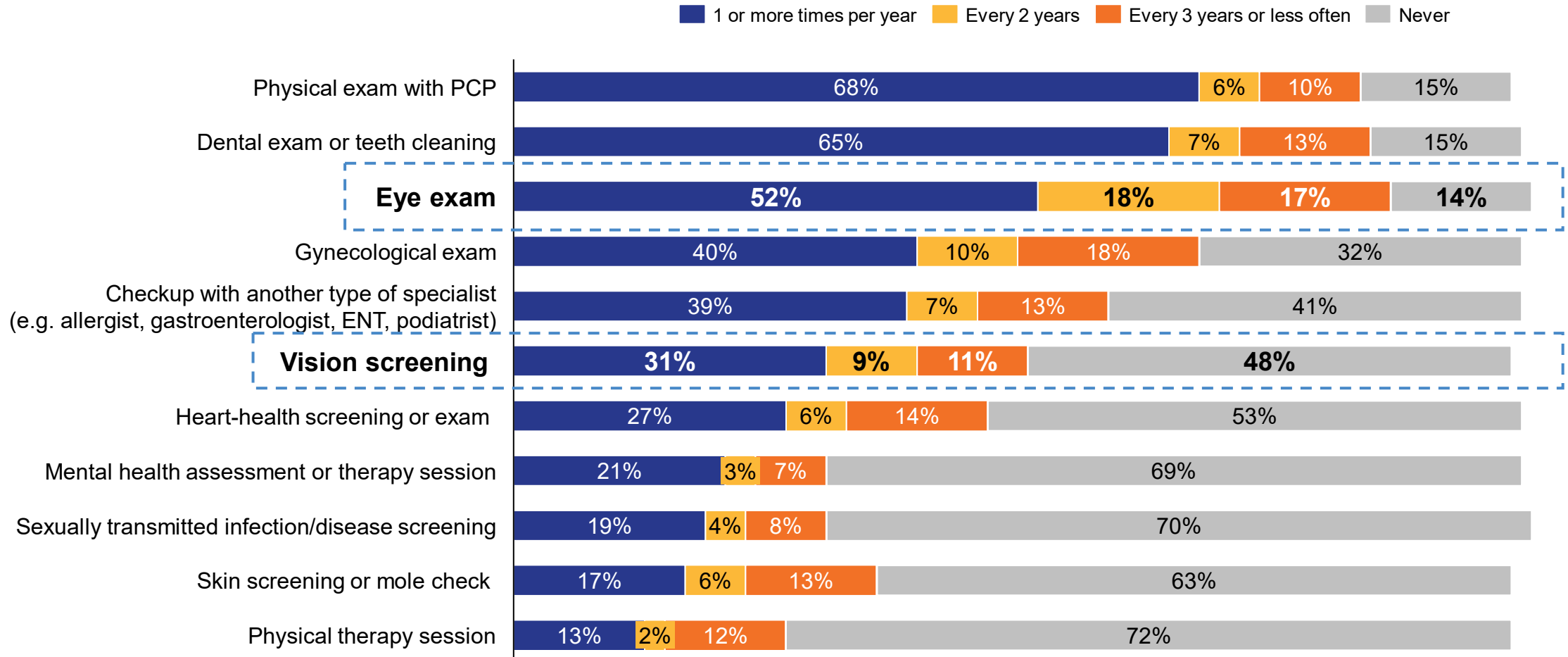
Eye Exam and Consumer Spending Custom Research

Methodology:

- This poll was conducted by Morning Consult on behalf of The Vision Council between January 4-5, 2021 among a national sample of 2,200 U.S. adults
- The interviews were conducted online and the data were weighted to approximate a target sample of U.S. adults based on gender, educational attainment, age, race, and region
- Results from the full survey have a margin of error of plus or minus 2 percentage points

Eye exams rank in the “Top 3” in frequency of healthcare related exams and visits

In normal times, how often do you have each of the following appointments?

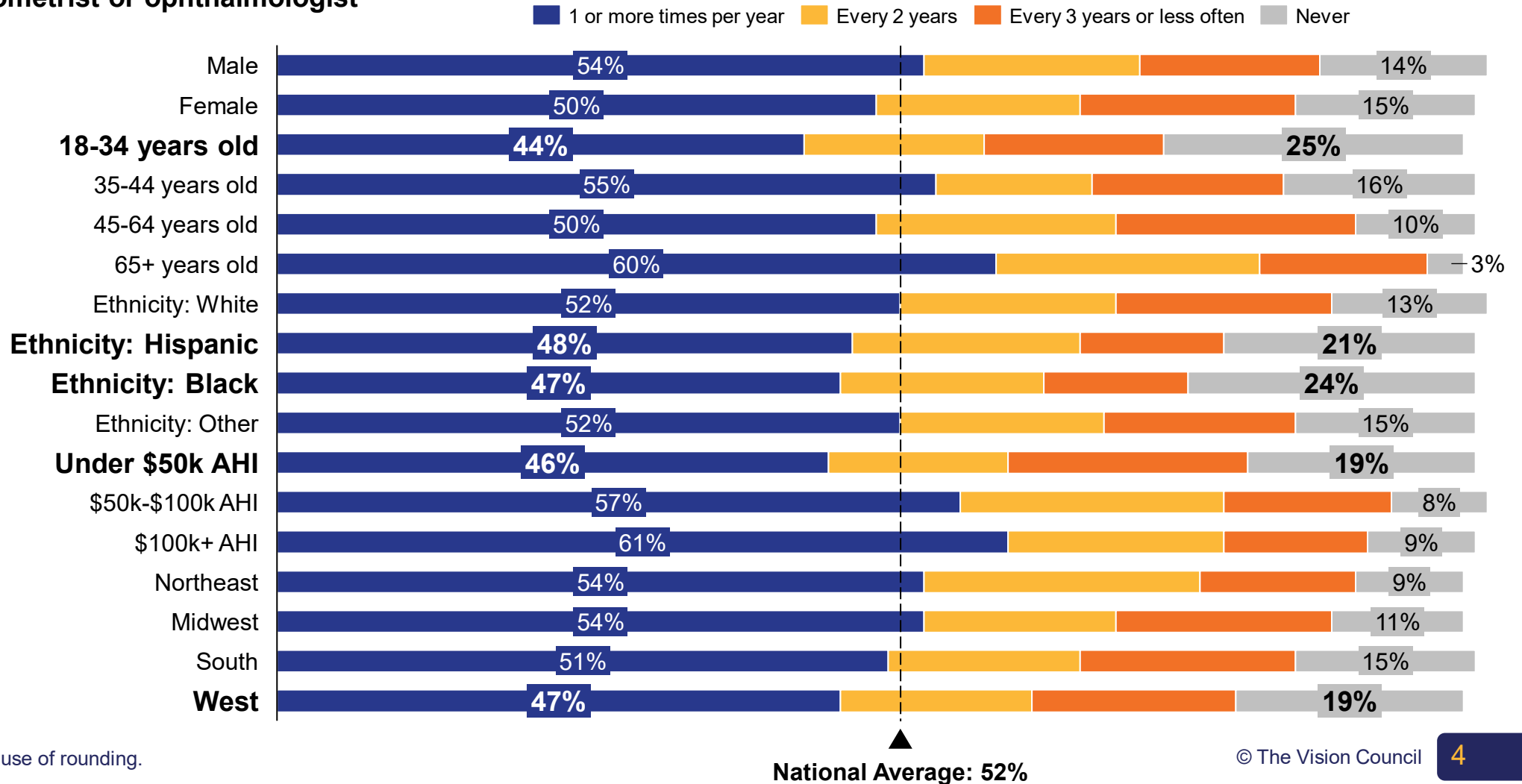


Figures will not sum to 100%, because of rounding.

Various consumer segments lag behind national average in eye exam frequency

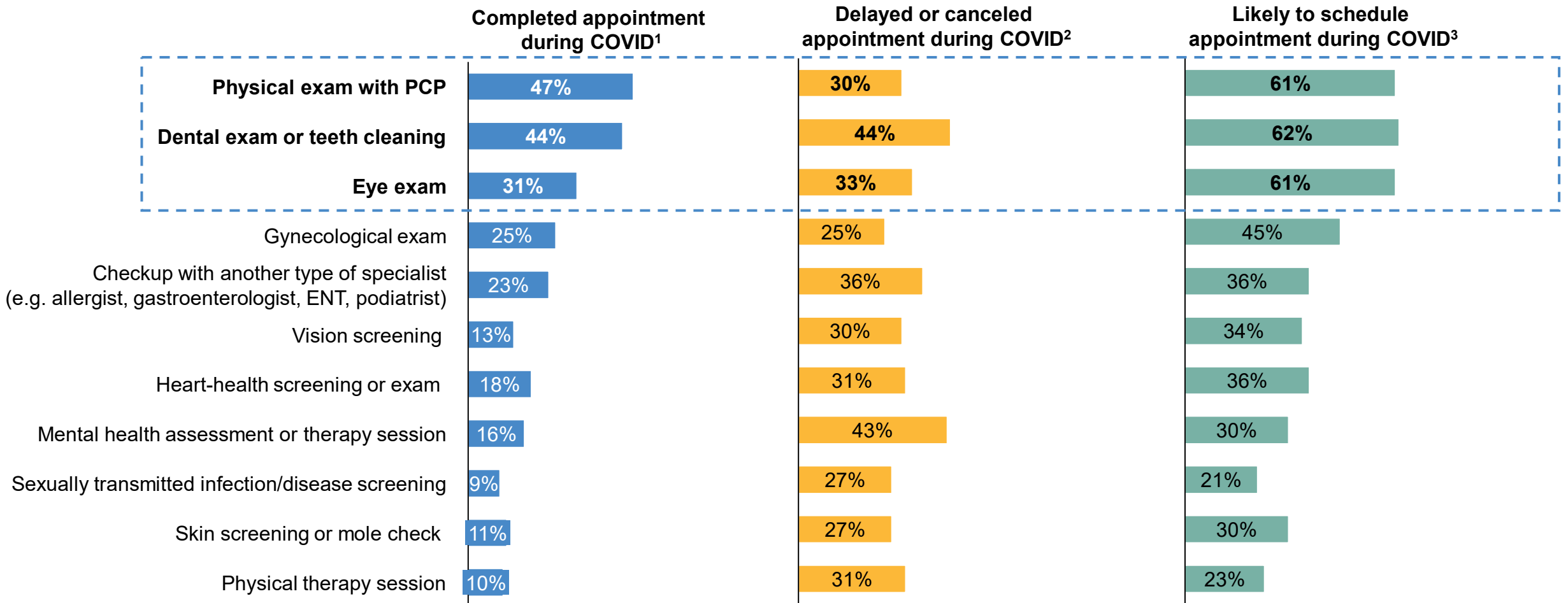
In normal times, how often do you have each of the following appointments?

Eye exams with an optometrist or ophthalmologist



Figures will not sum to 100%, because of rounding.

The “Top 3” healthcare exam and appointment priorities are unchanged during a global pandemic

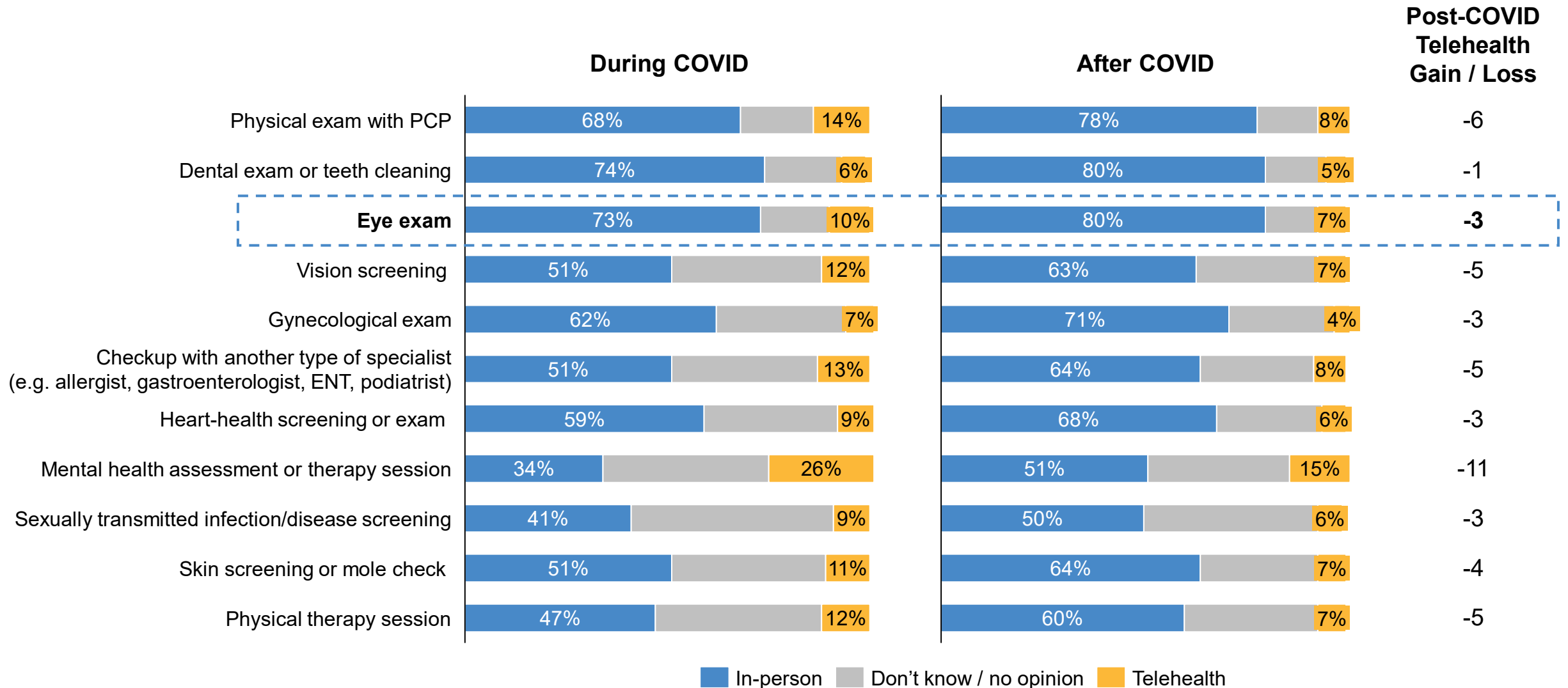


1. Since the beginning of the COVID-19 pandemic, have you had any of the following types of appointments? % responding Yes

2. Prior to having your appointment, did you delay or cancel any of the following appointments due to the COVID-19 pandemic? % responding Yes

3. As the COVID-19 pandemic continues, how likely are you, if at all, to make any of the following appointments if needed? % responding Somewhat Likely and Very Likely

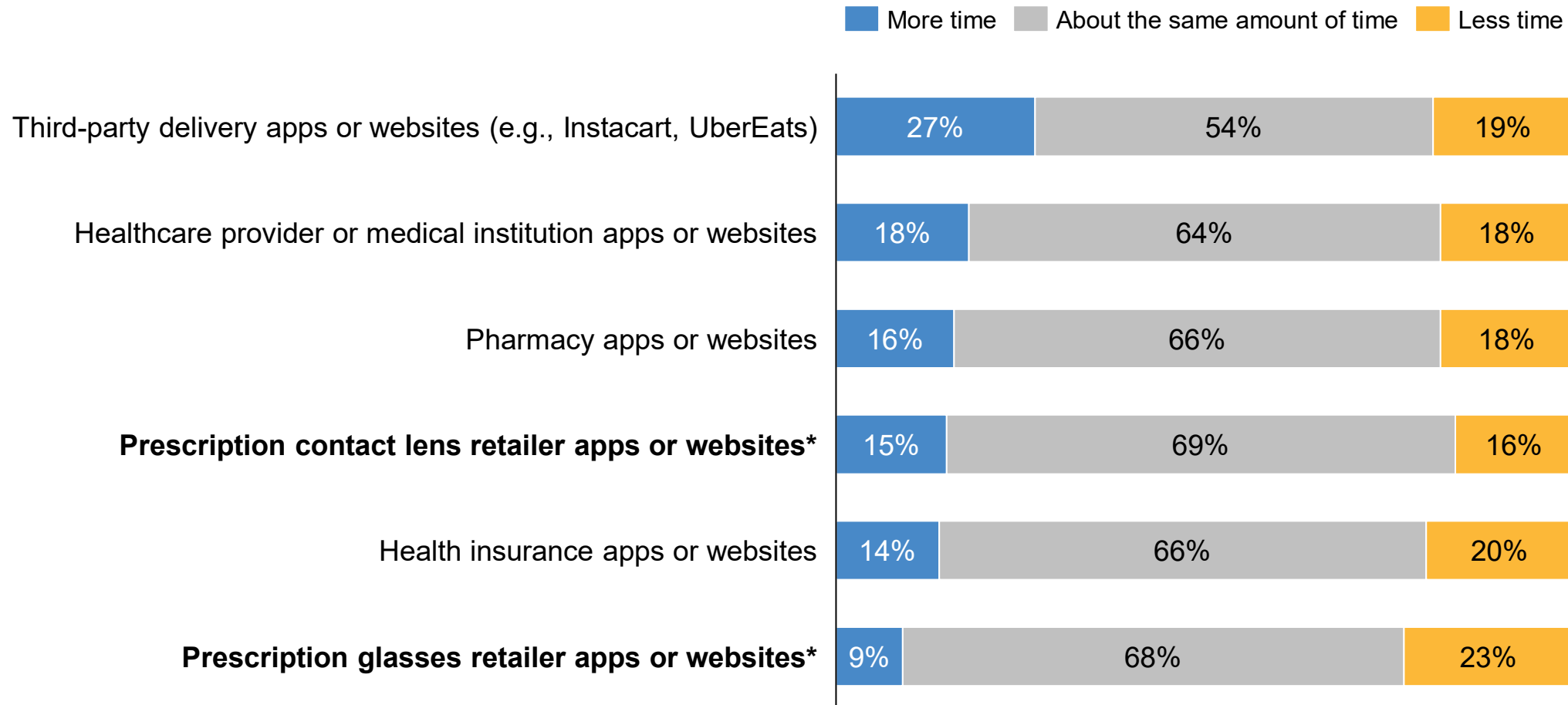
In-person appointments will still be the preference for healthcare exams and visits, but telehealth is beginning to make in-roads



Would you prefer to attend an in-person appointment or virtual (telehealth) appointment for each of the following?
 Figures will not sum to 100%, because of rounding.

Consumer use of digital channels for their vision care needs trails other essential needs and healthcare categories

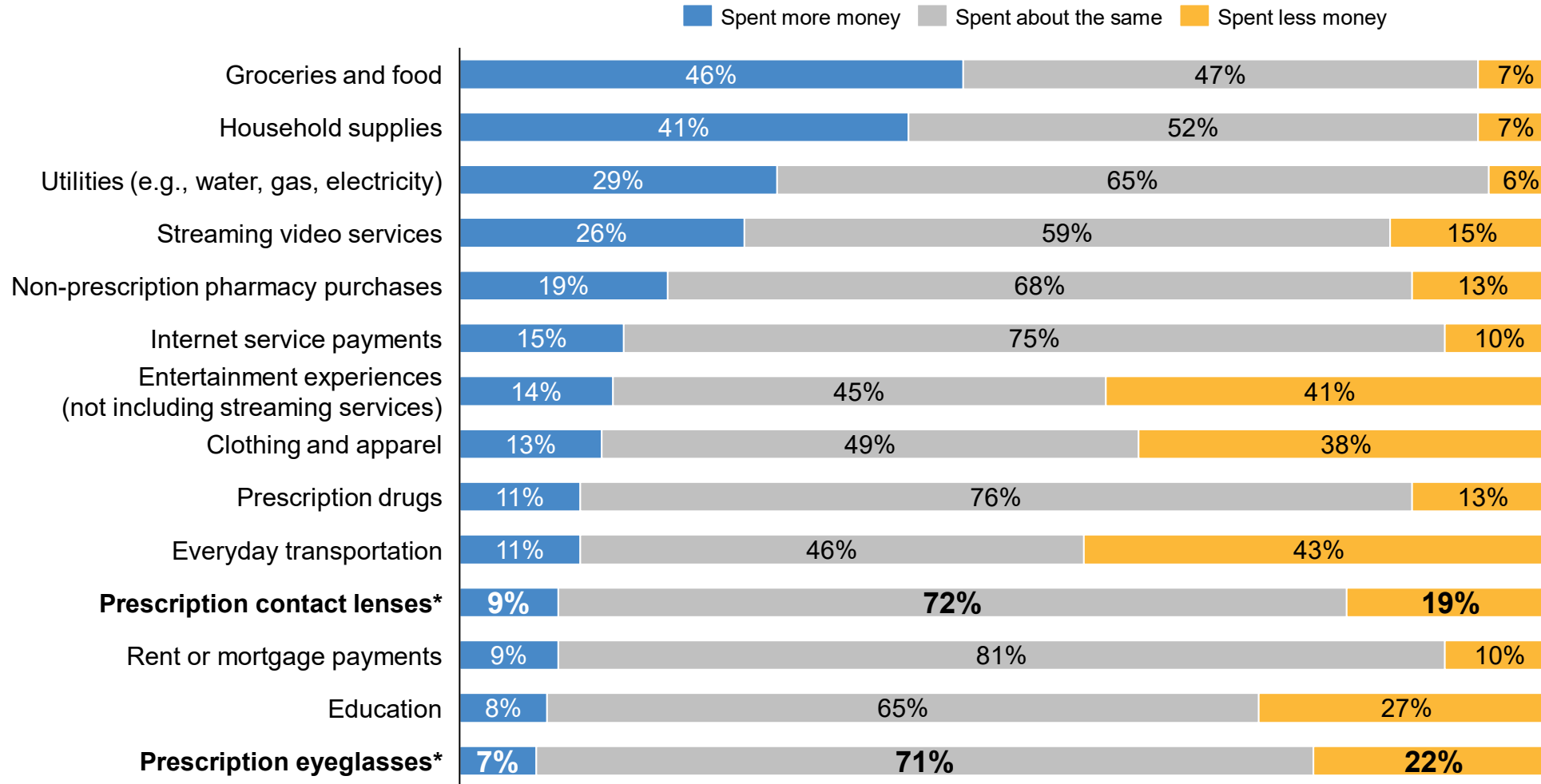
Since the beginning of the COVID-19 pandemic, have you spent more or less time online on each of the following than you usually do?



* Asked only among adults with a prescription for eyeglasses (n = 1,459) and contact lenses (n = 401)

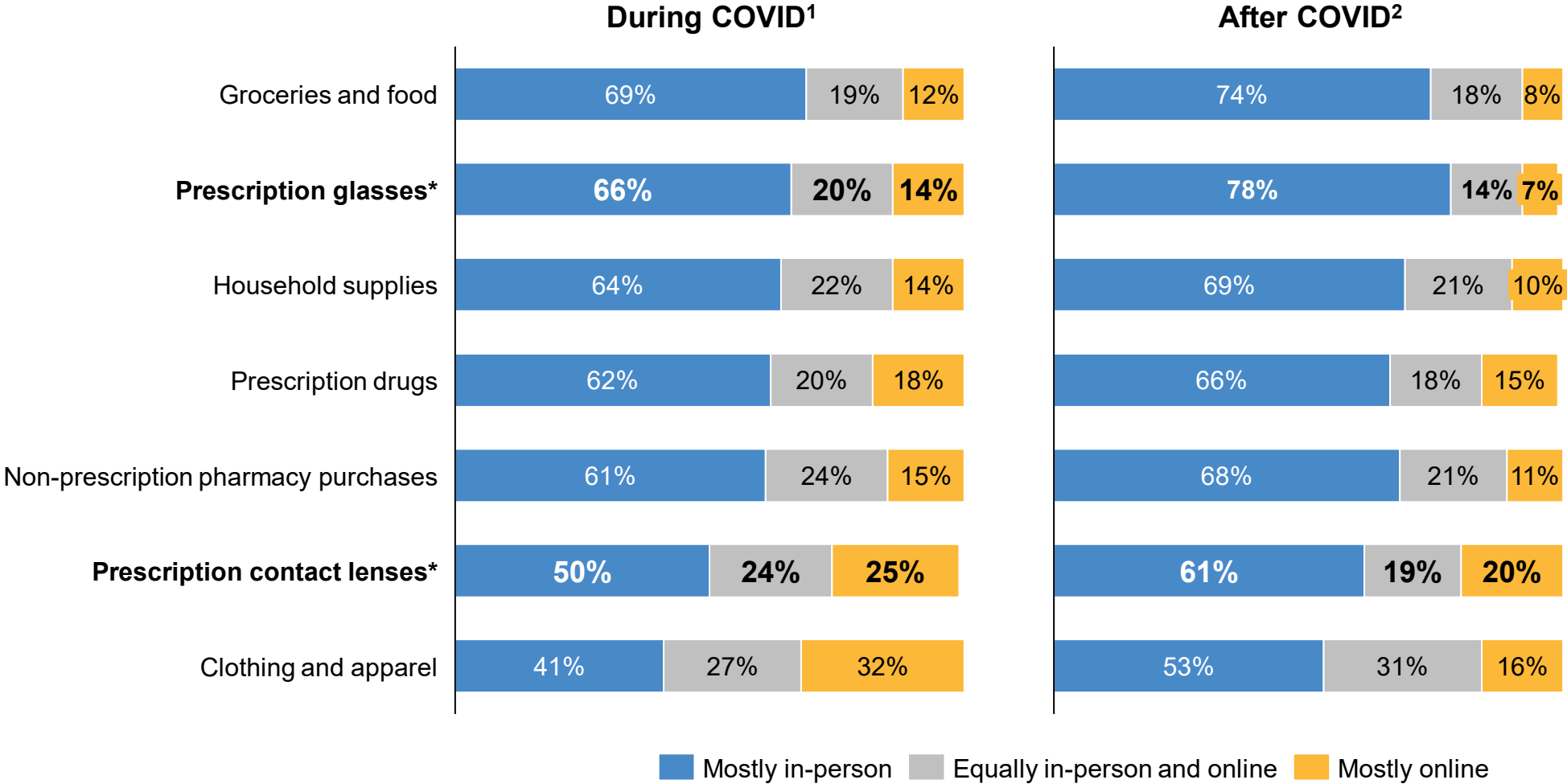
Consumer spending for vision care products is not keeping up with other categories during the pandemic

Since the beginning of the COVID-19 pandemic, have you spent more or less money, or have you spent just about the same on the following categories than you usually do?



* Asked only among adults with a prescription for eyeglasses (n = 1,459) and contact lenses (n = 401)

While some consumers anticipate shifting their online spending back in-store after the pandemic, a portion will remain “mostly online” for glasses and contacts



1. Since the beginning of the COVID-19 pandemic, have your purchases for the following types of products been made mostly in-person or mostly online?
 2. After the COVID-19 pandemic is over, do you anticipate your purchases for the following products will be made mostly in-person or mostly online?
 * Asked only among adults with a prescription for eyeglasses (n = 1,459) and contact lenses (n = 401)

Thank You



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