

VisionWatch April 2020 COVID-19 Consumer Study

**The Vision Council Research
Department**

Steve Kodey,
Senior Director of Industry Research Services

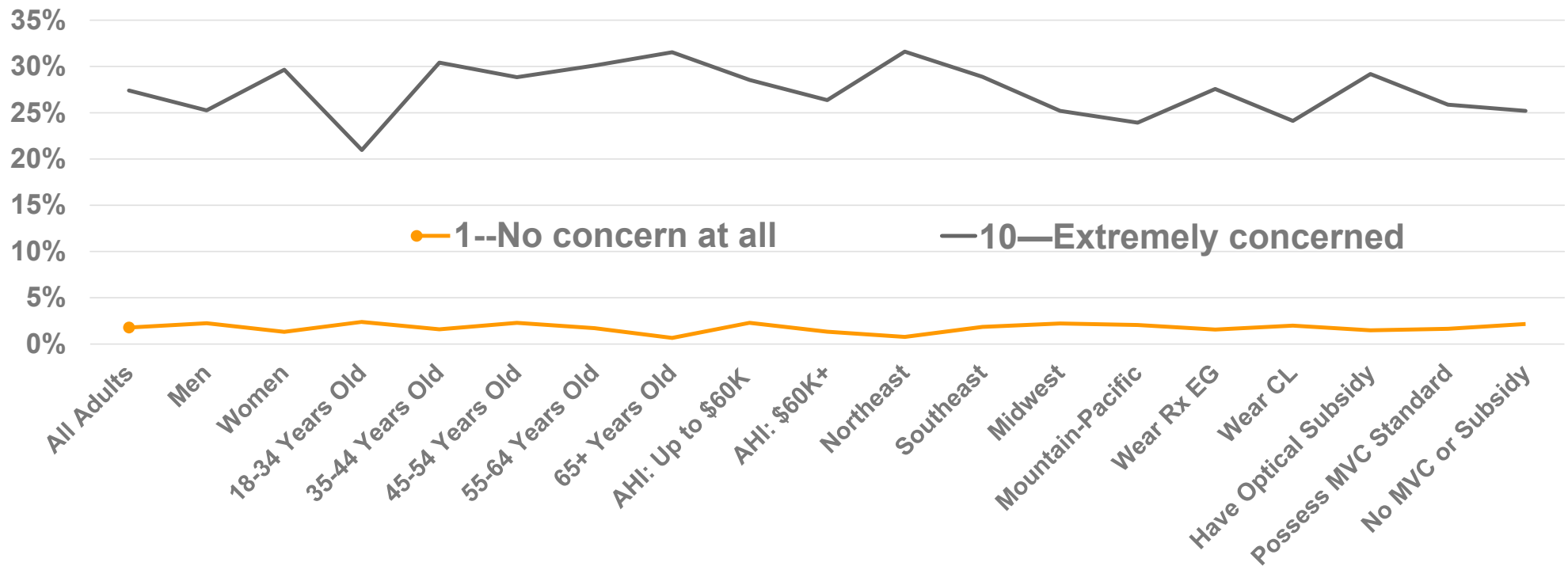
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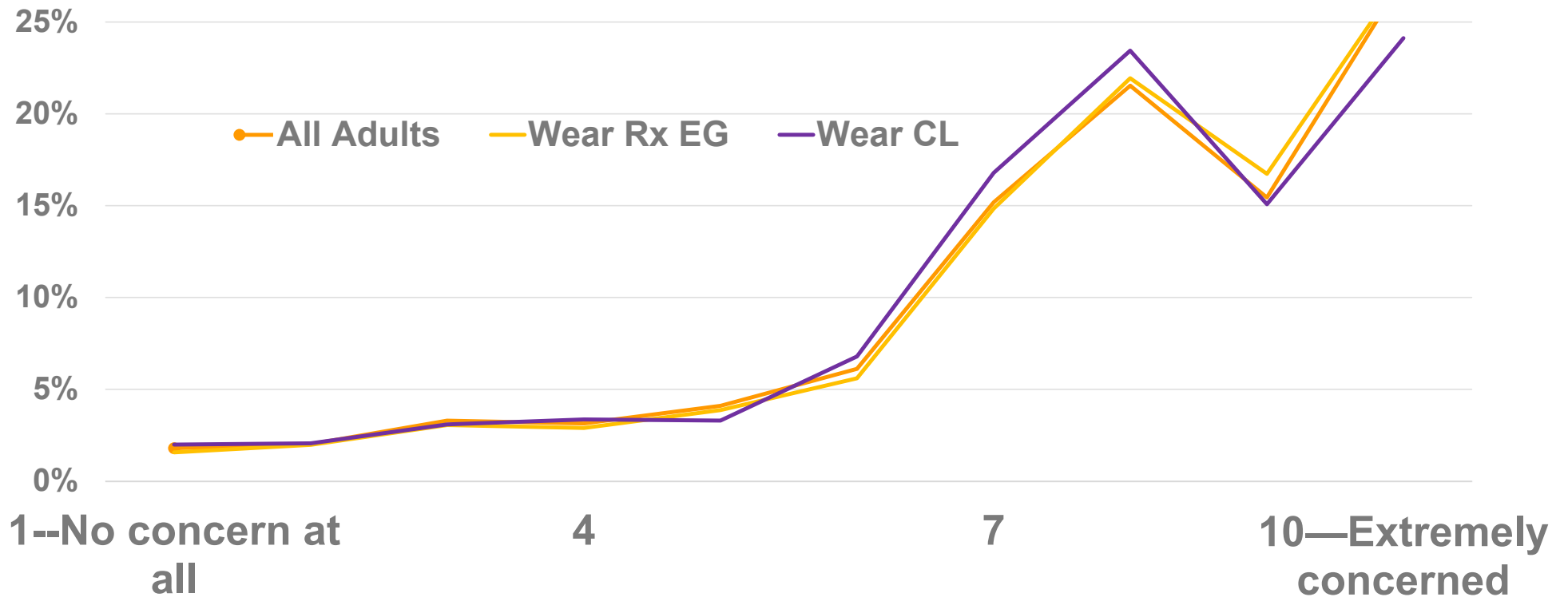
VisionWatch April 2020 COVID-19 Consumer Study Methodology

- Custom Consumer Study Conducted via The Vision Council's VisionWatch Survey Program
- 16 questions appended to the end of the April 2020 monthly VisionWatch survey
 - Fielded to a demographically balanced sample of 11,640 US adults over the Internet in April
 - Fielded from April 8th – April 30th
- 239 inaccurate responses removed from the April data file for a final working sample of 11,401 adults for the month of April

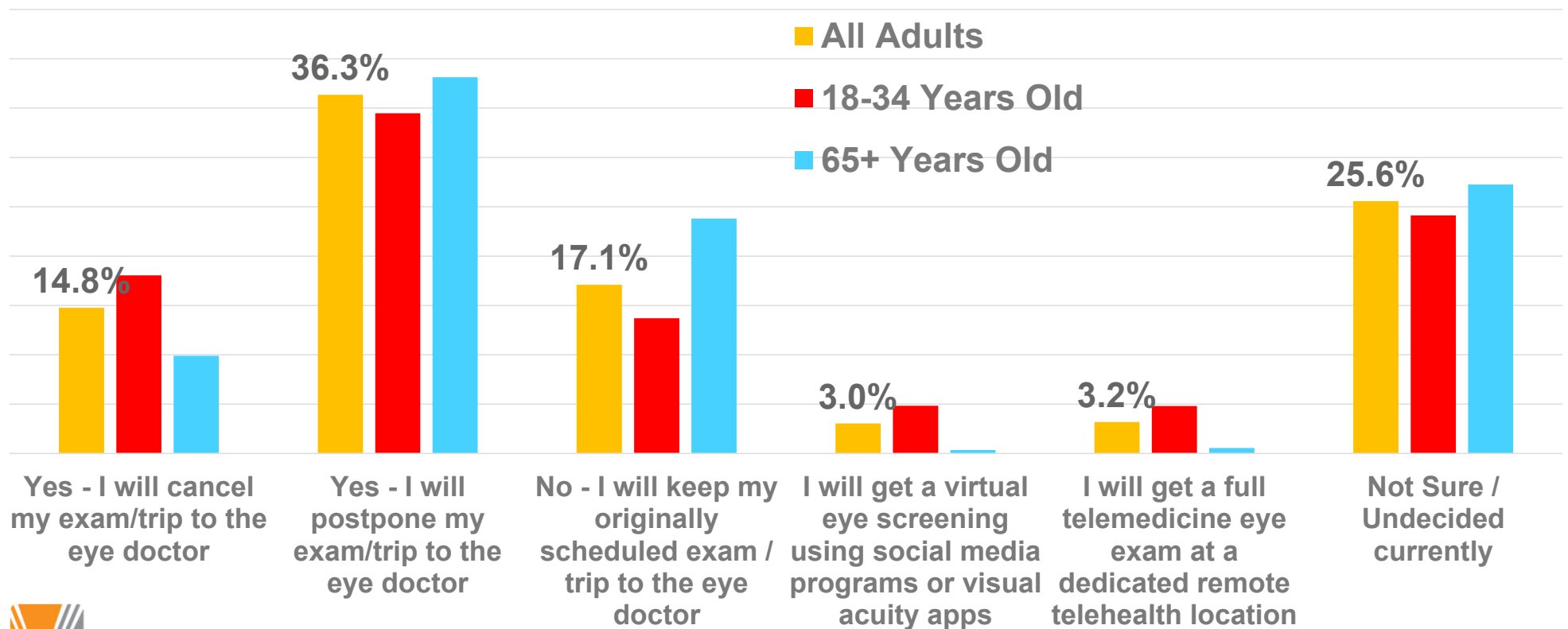
April 2020: On a scale of 1-10 how concerned are you over the recent global COVID-19 threat and outbreak?



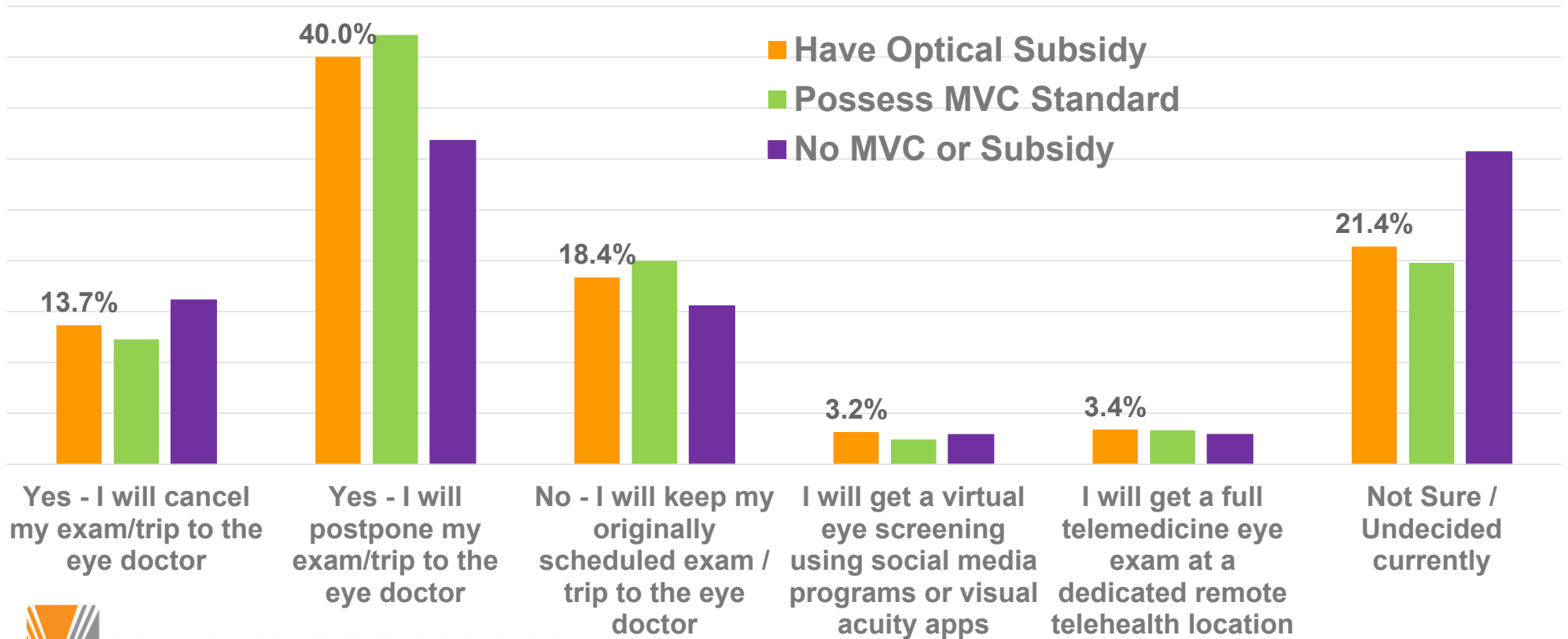
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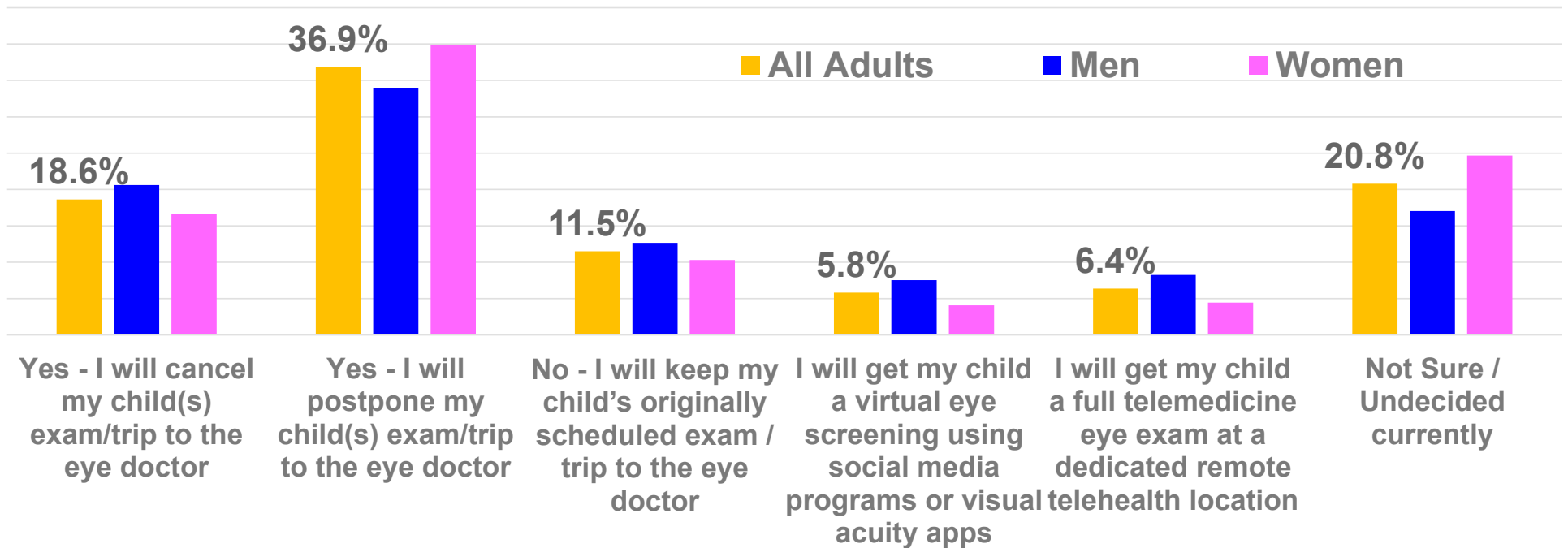
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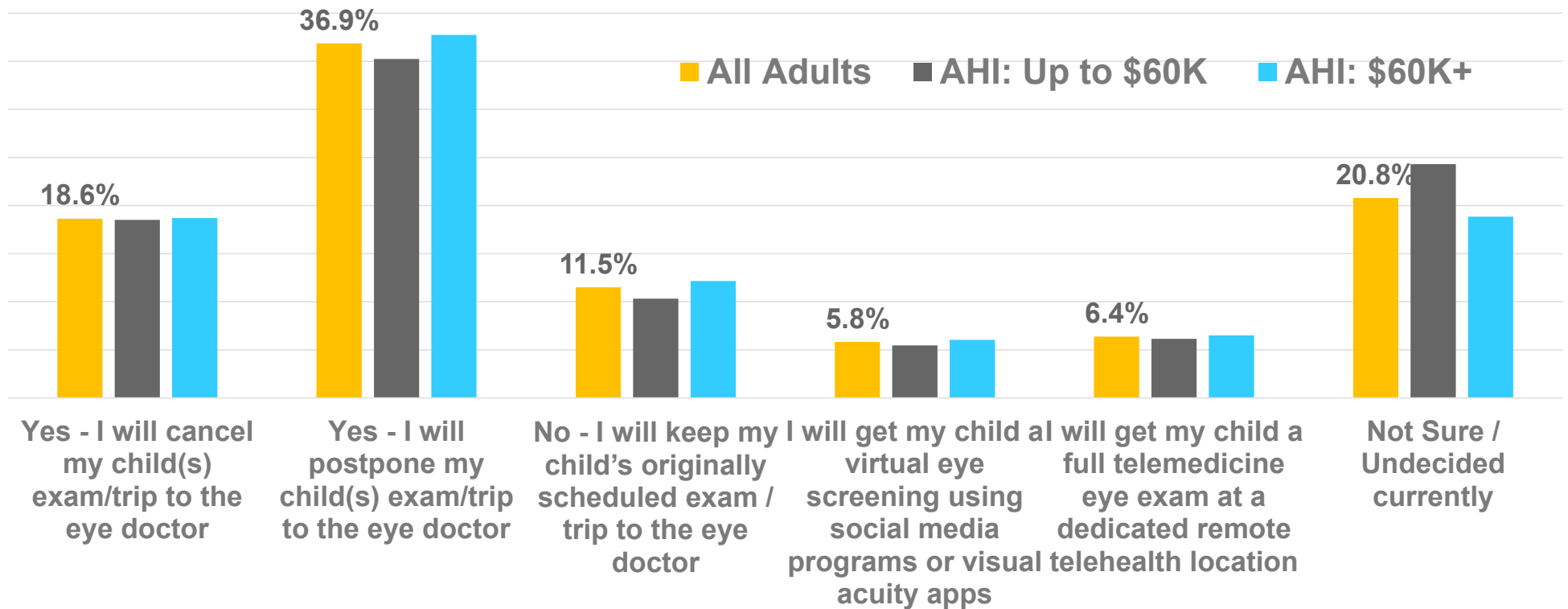
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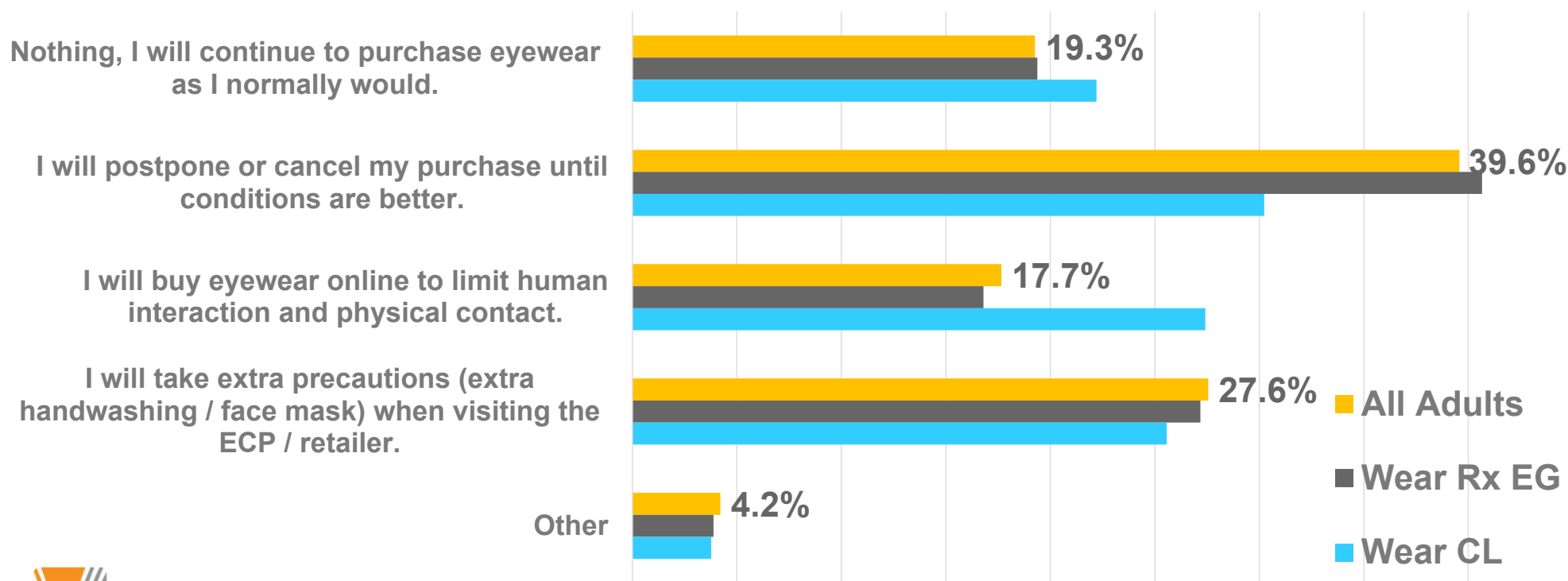
April 2020: Will you postpone or cancel any eye exams or trips to the eye doctor for your children while COVID-19 is still a threat?



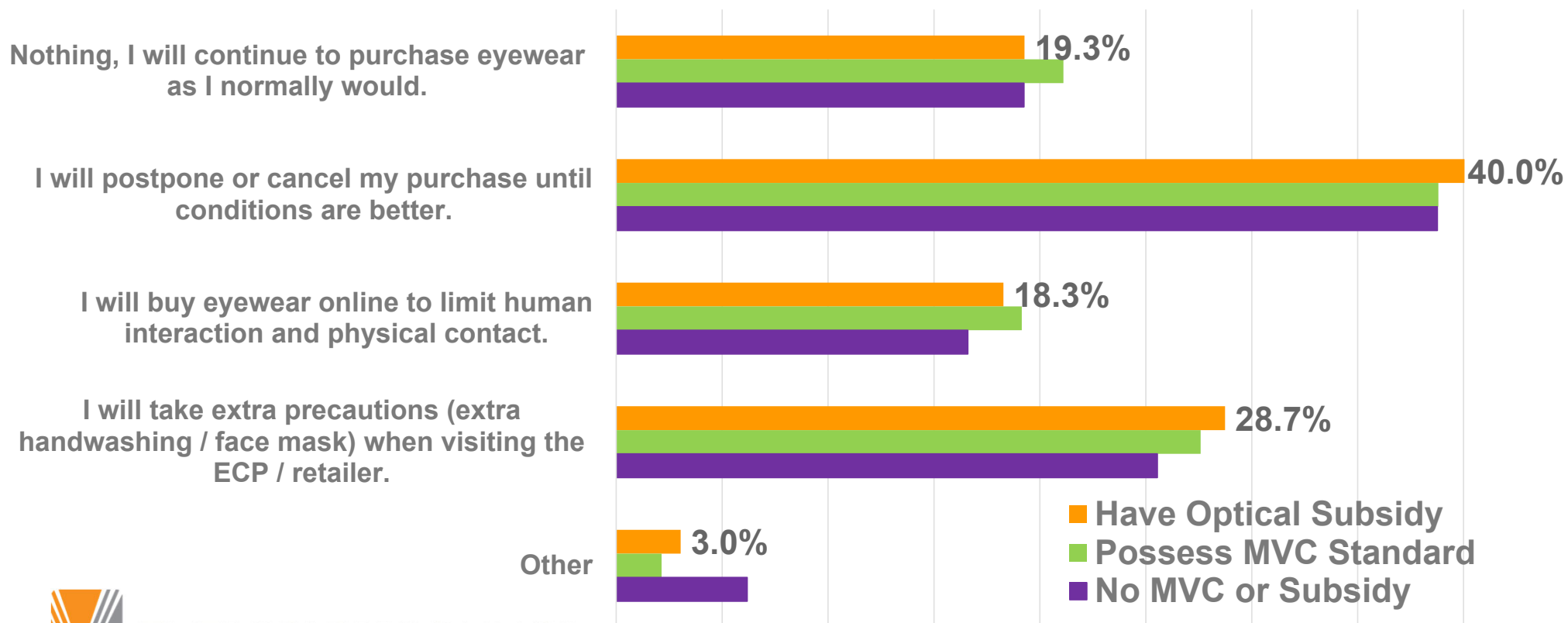
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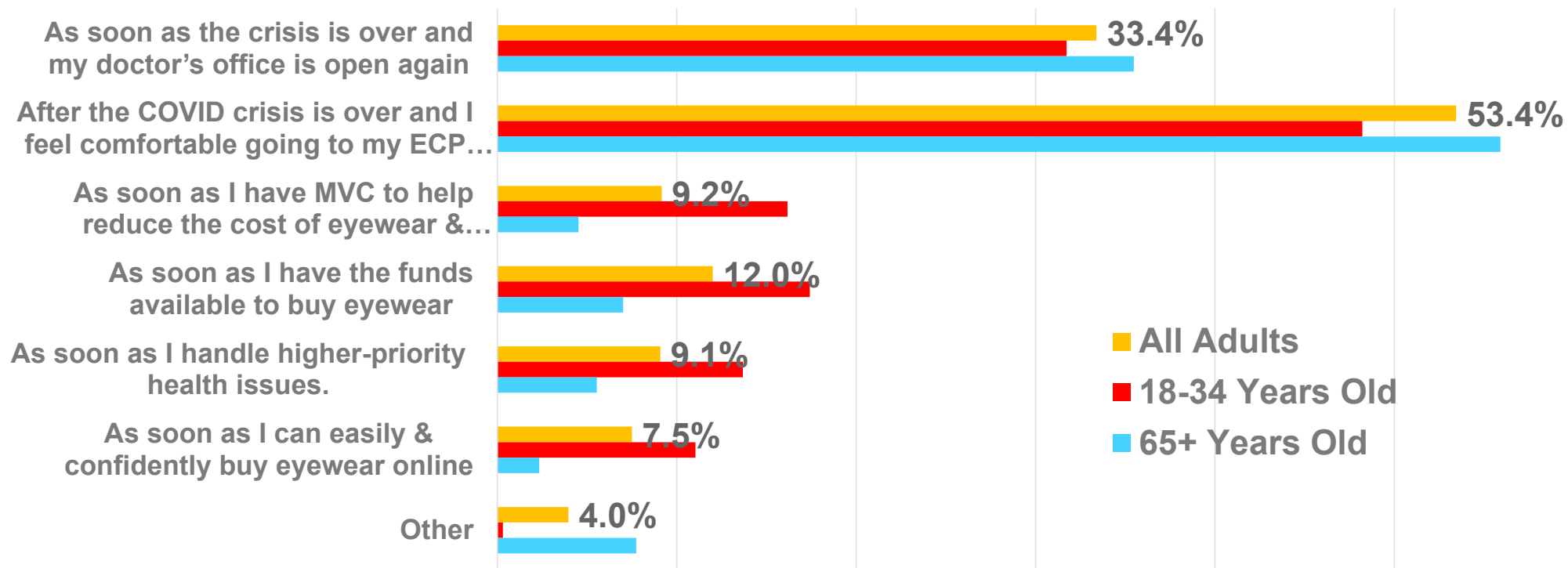
April 2020: If you need new eyeglasses or contact lenses while COVID-19 is still a threat, which of the following actions are you likely to take?



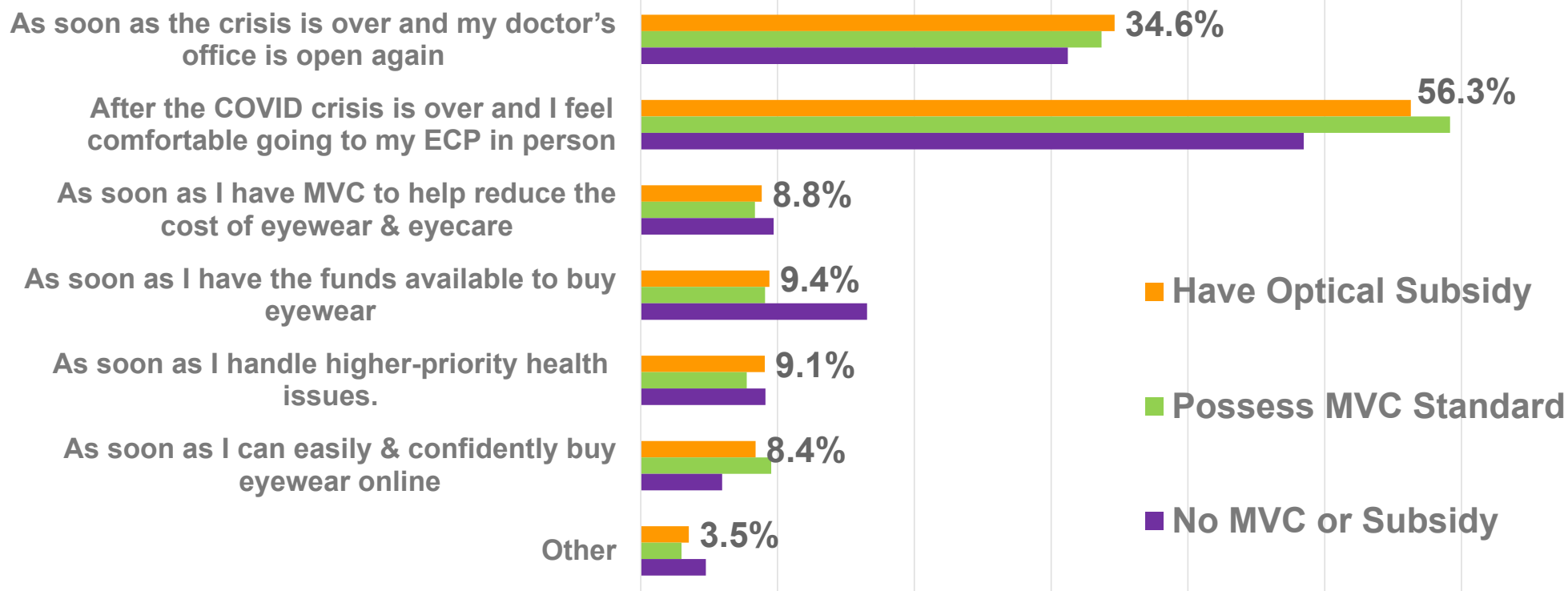
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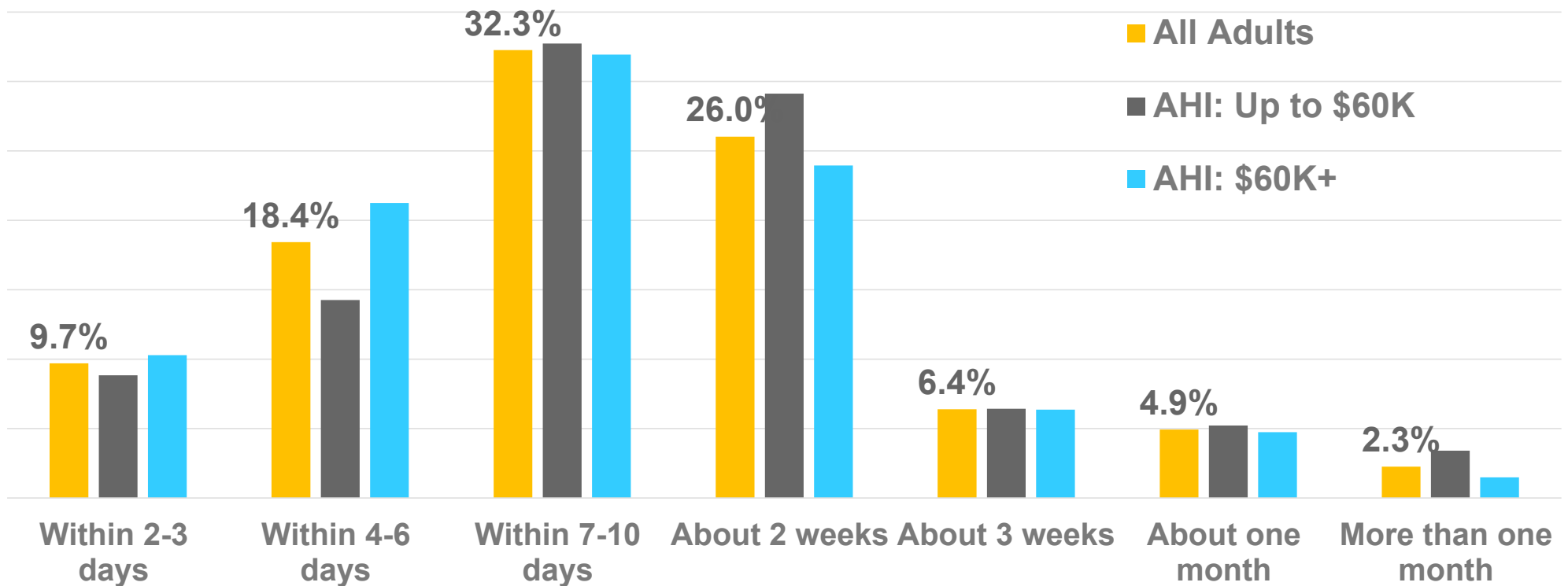
April 2020: When do you anticipate buying eyewear in the future if you are postponing purchases during the COVID-19 crisis?



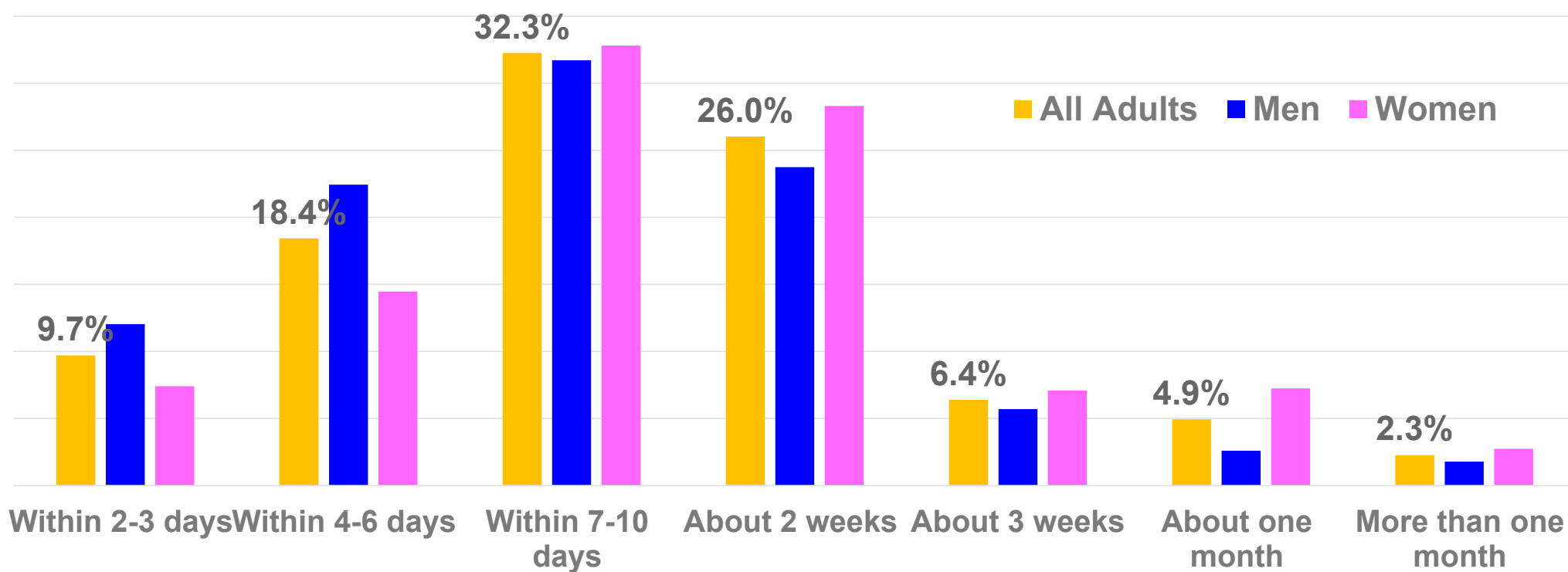
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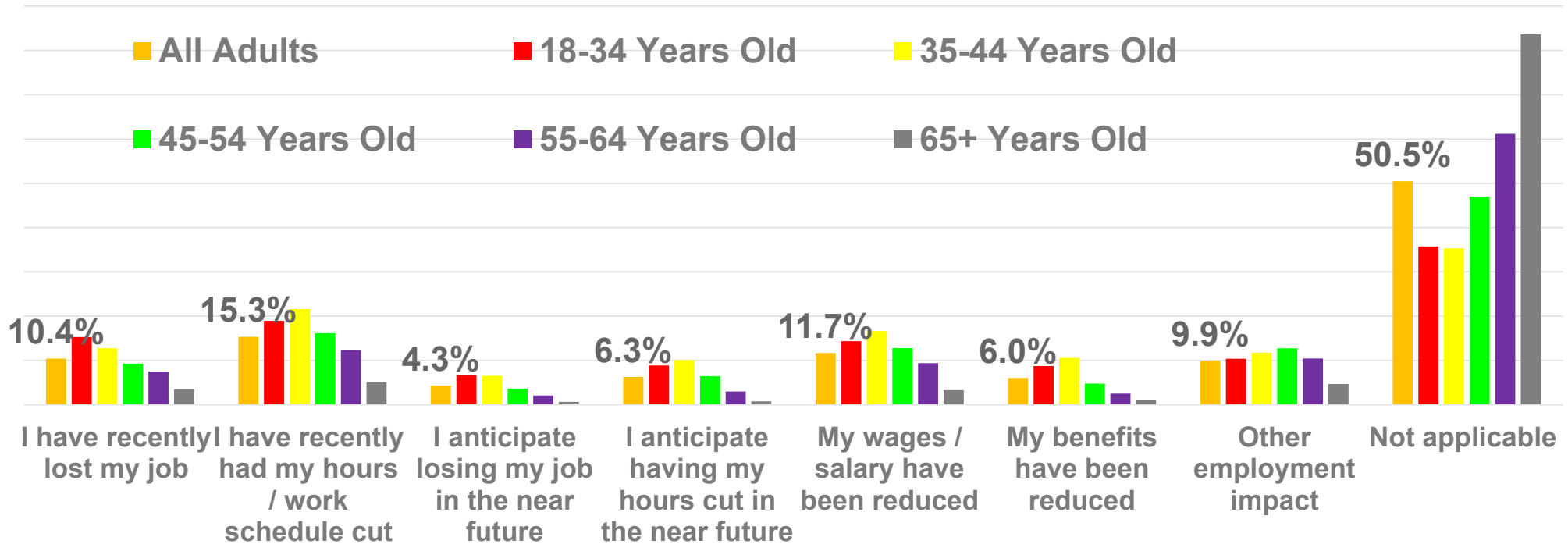
April 2020: If you purchase eyewear online in the near future, when would you expect your eyewear to be delivered to your home given the current COVID-19 crisis?



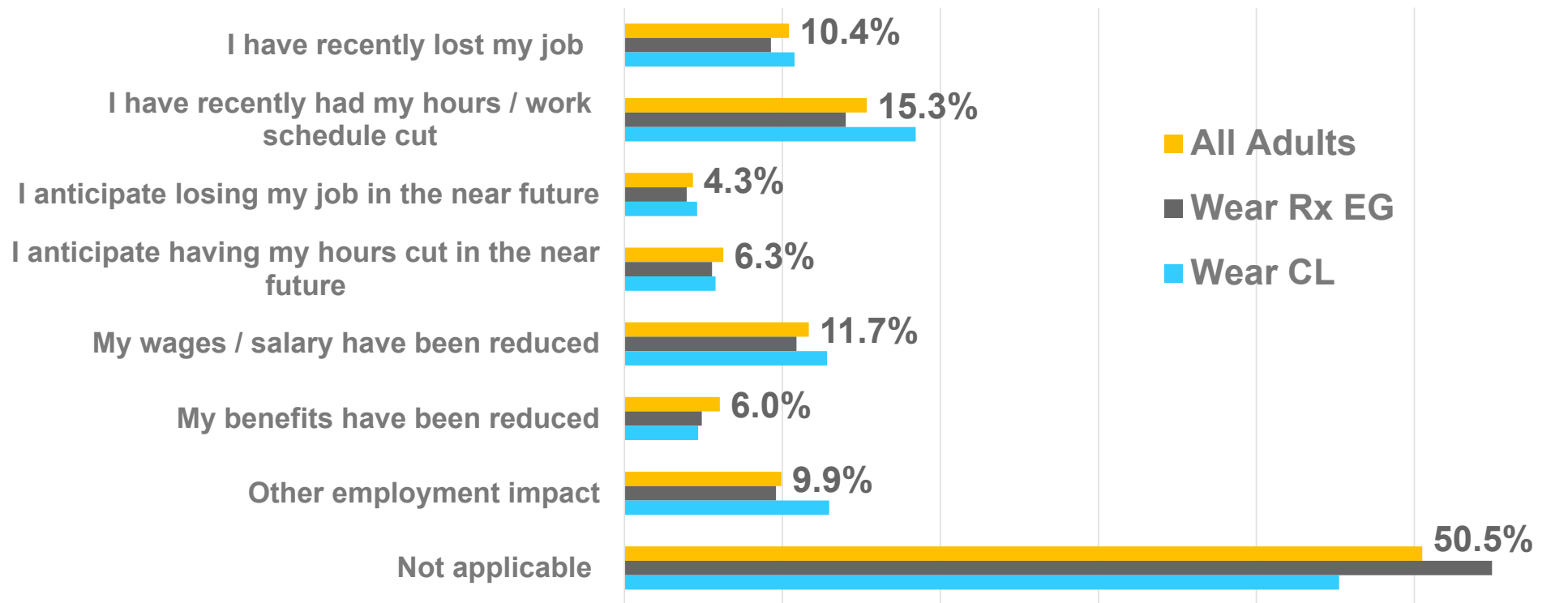
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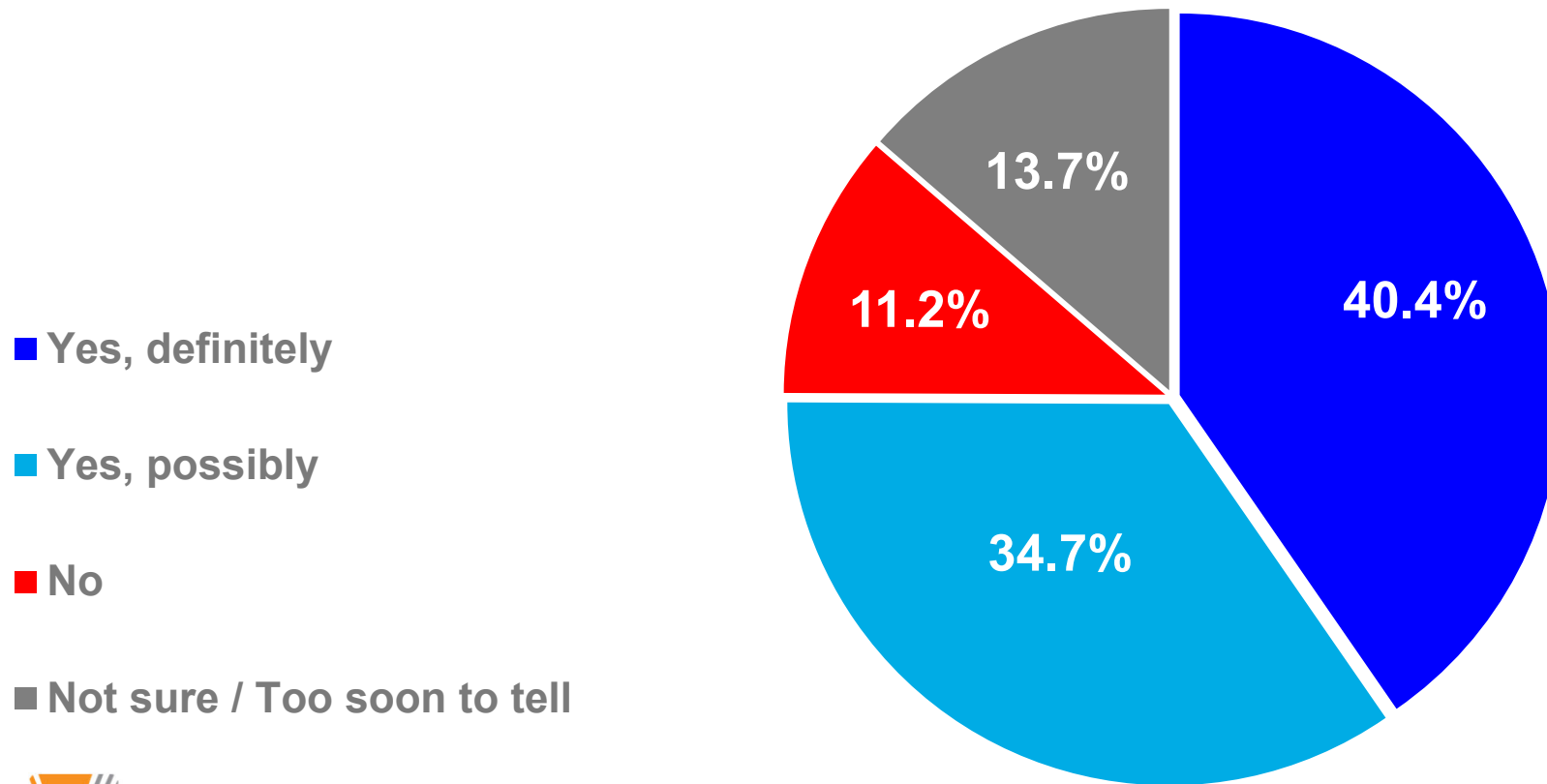
April 2020: How has COVID-19 impacted your employment situation?



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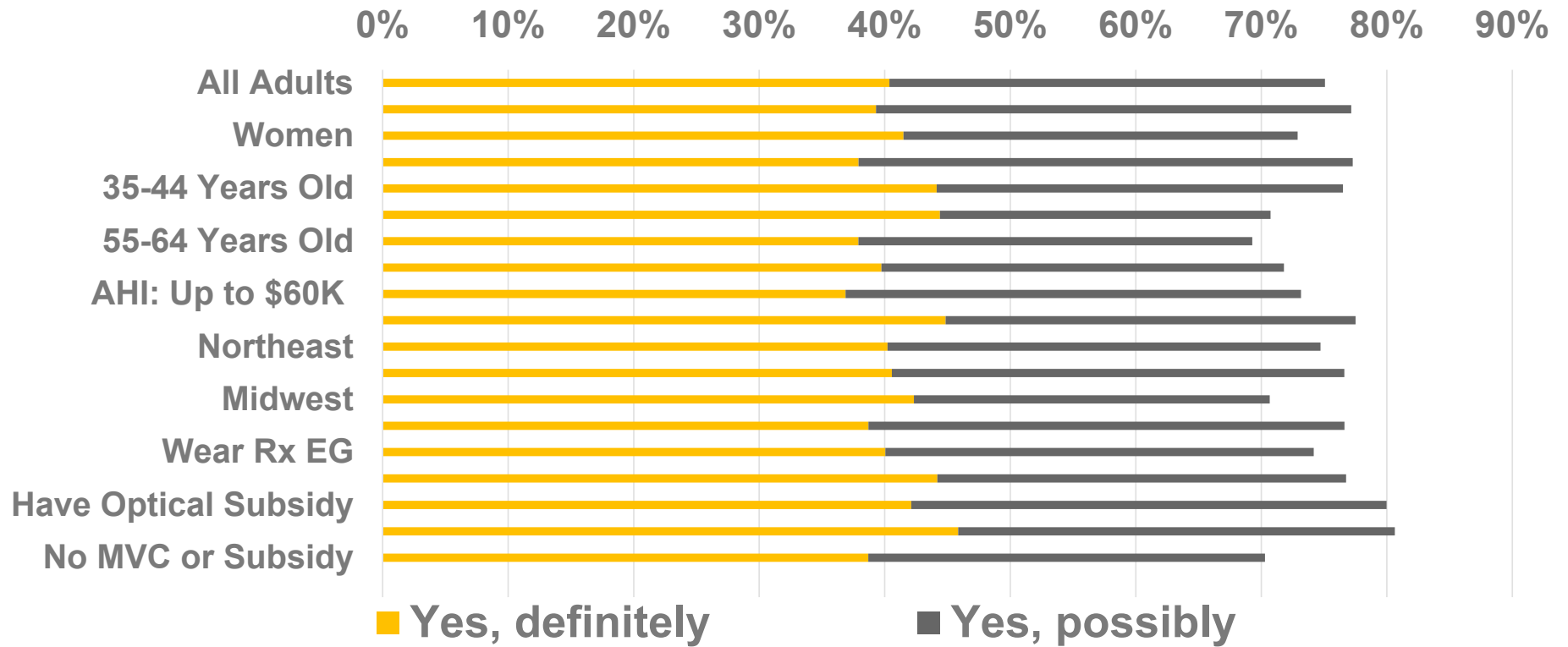


April 2020: Do you anticipate going back to your job, or getting an equivalent new one, once the COVID-19 crisis is over?

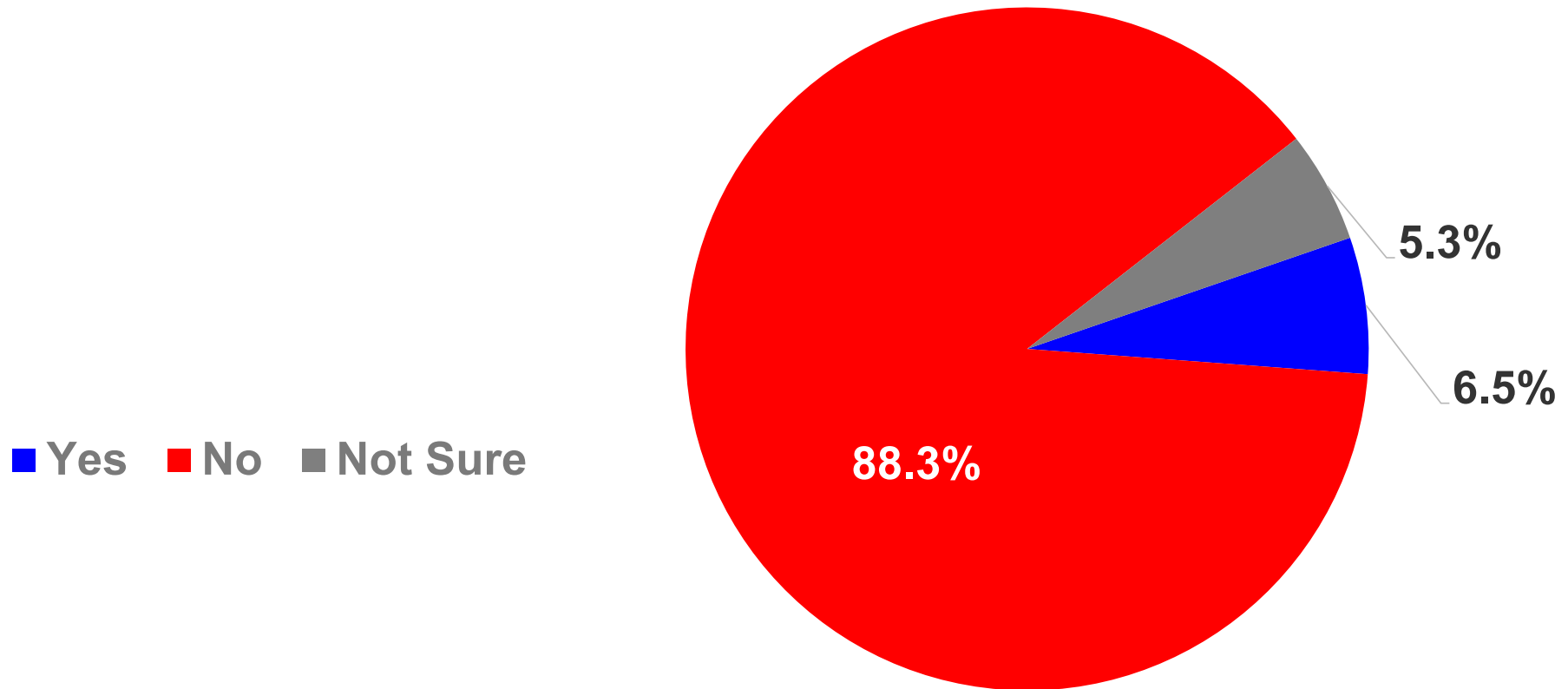


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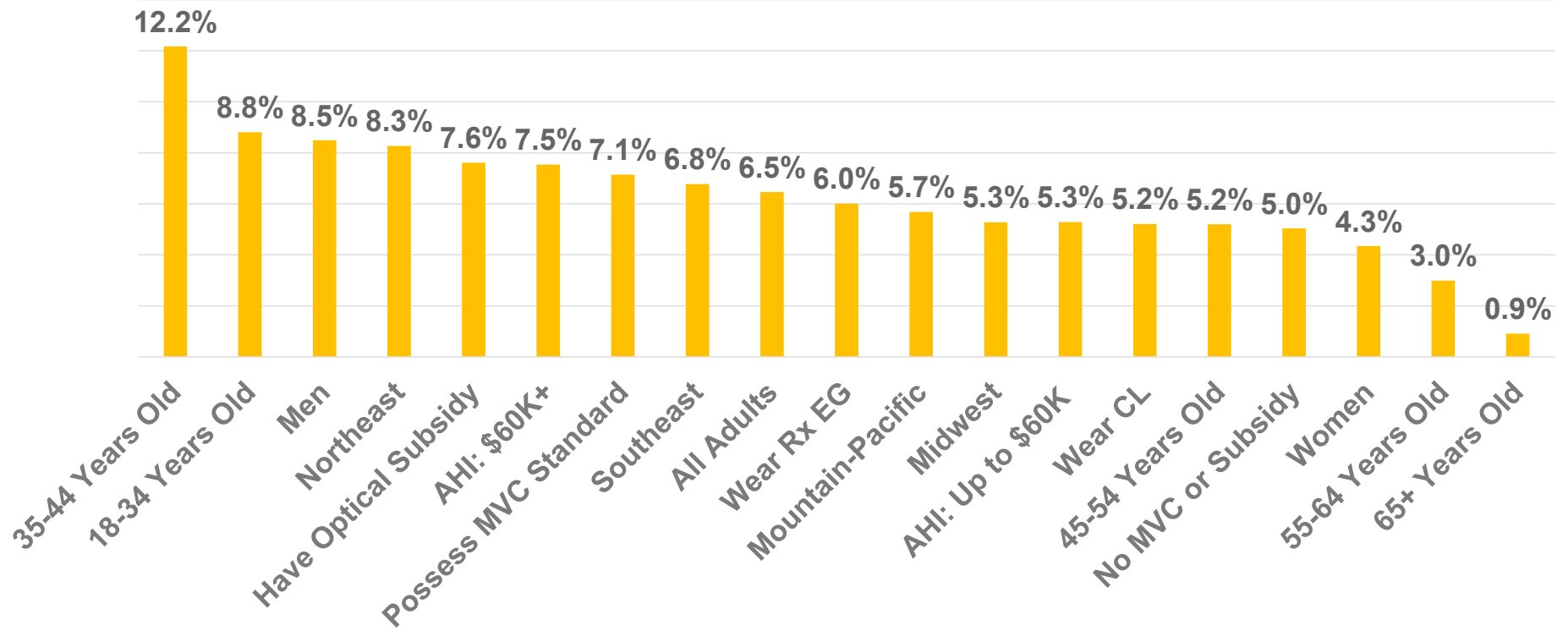
April 2020: Percentage of respondents that anticipate going back to their job, or getting an equivalent new one, once the COVID-19 crisis is over



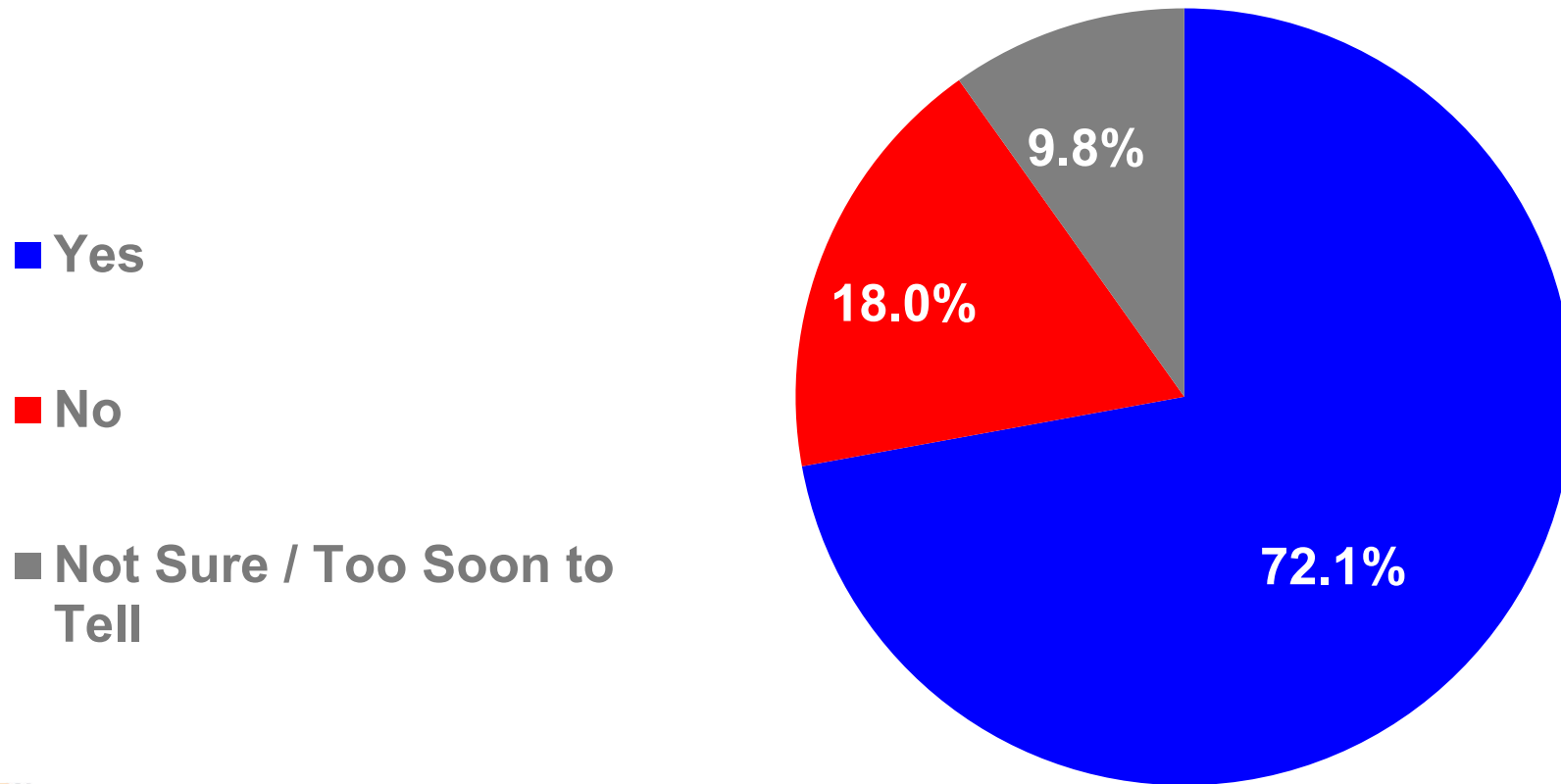
April 2020: Have you lost any vision insurance / vision benefits since the start of the COVID-19 crisis?



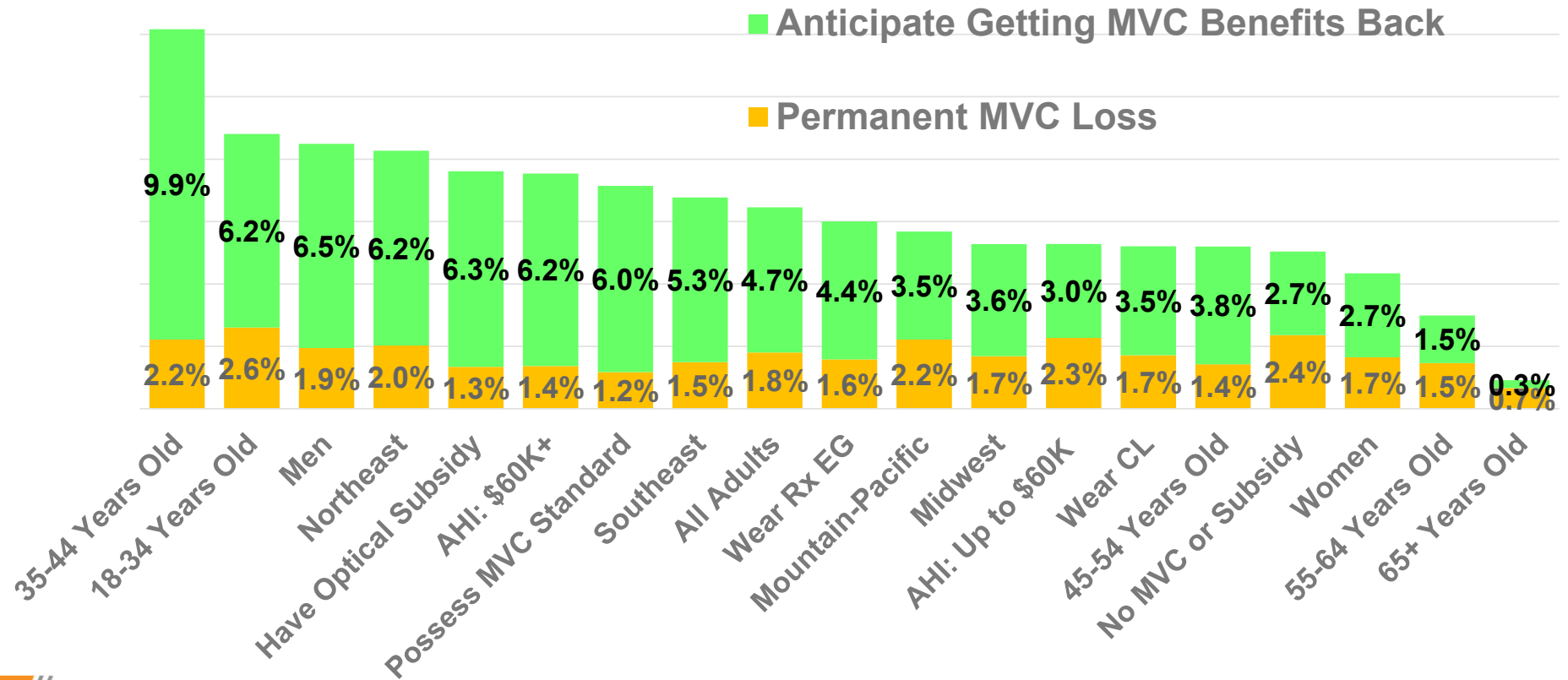
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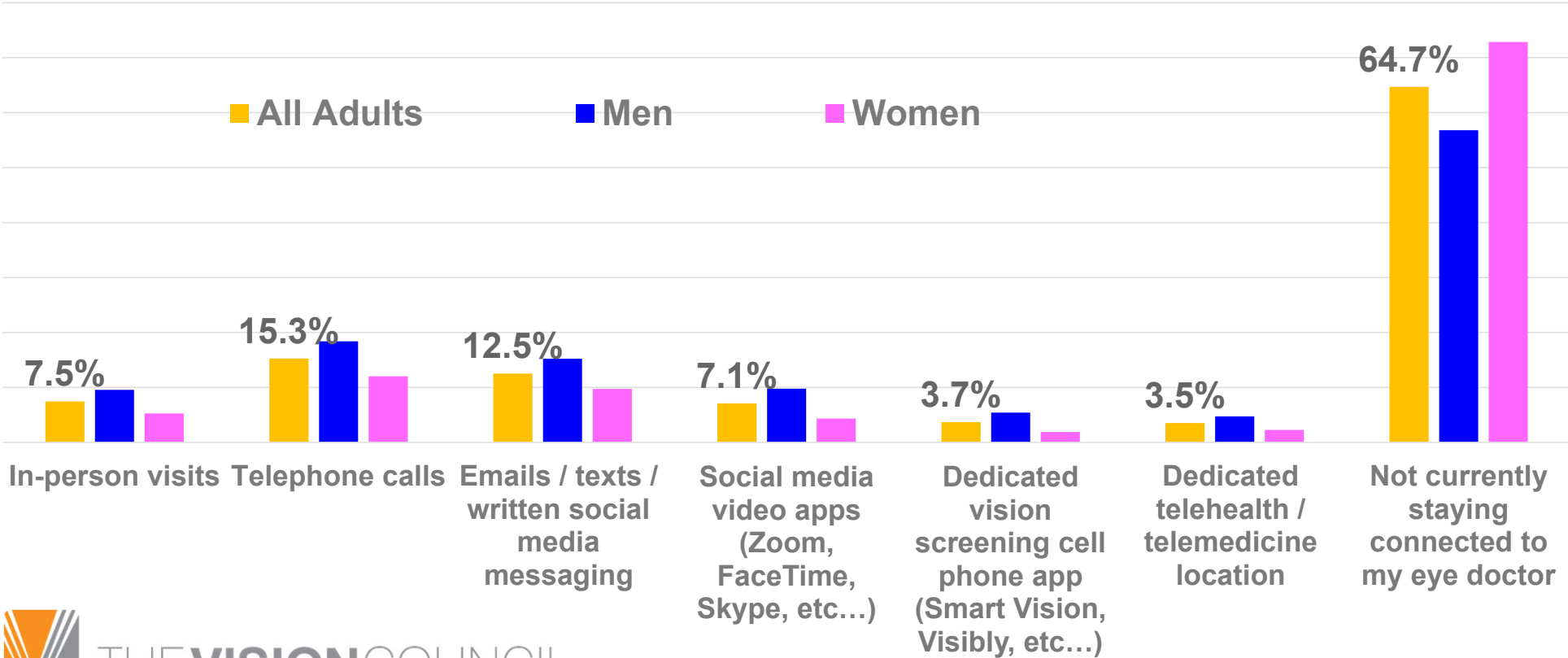
April 2020: Do you anticipate getting your vision insurance / vision benefits back once the COVID-19 crisis is over?



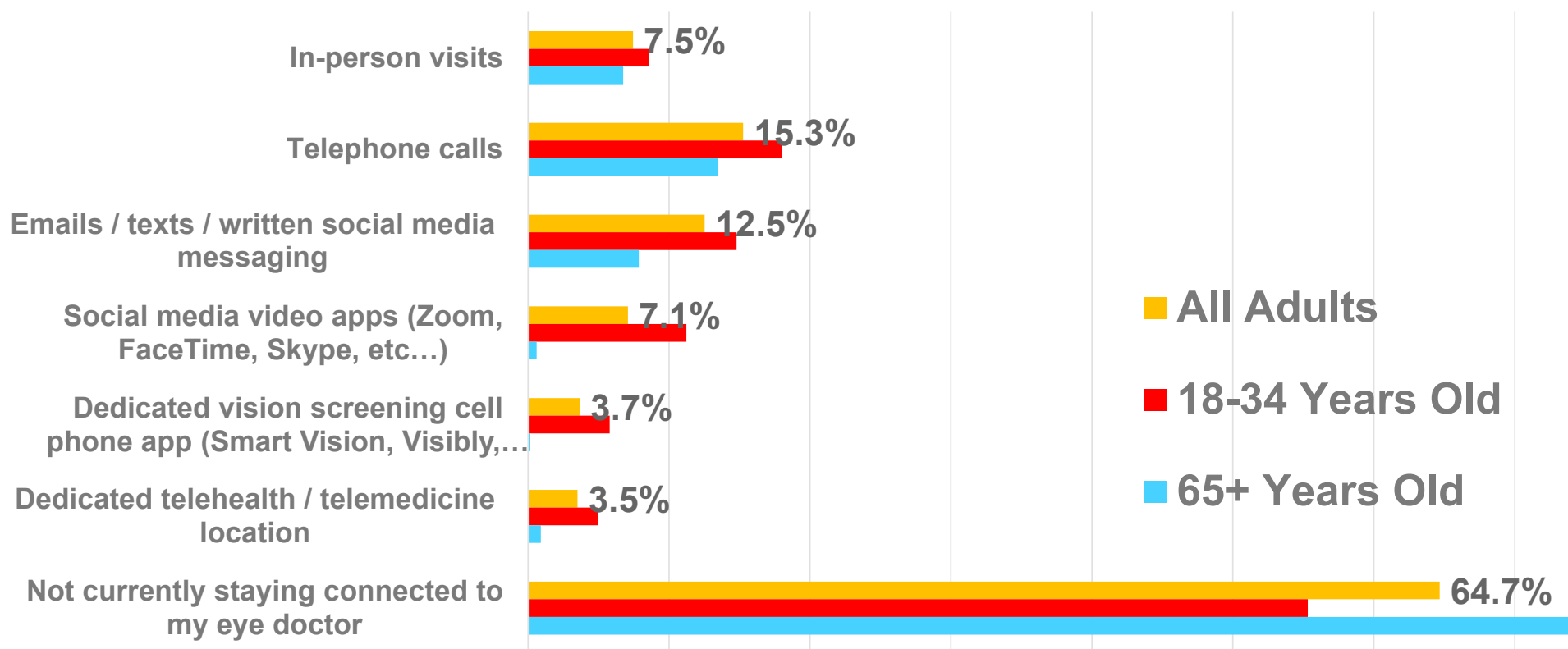
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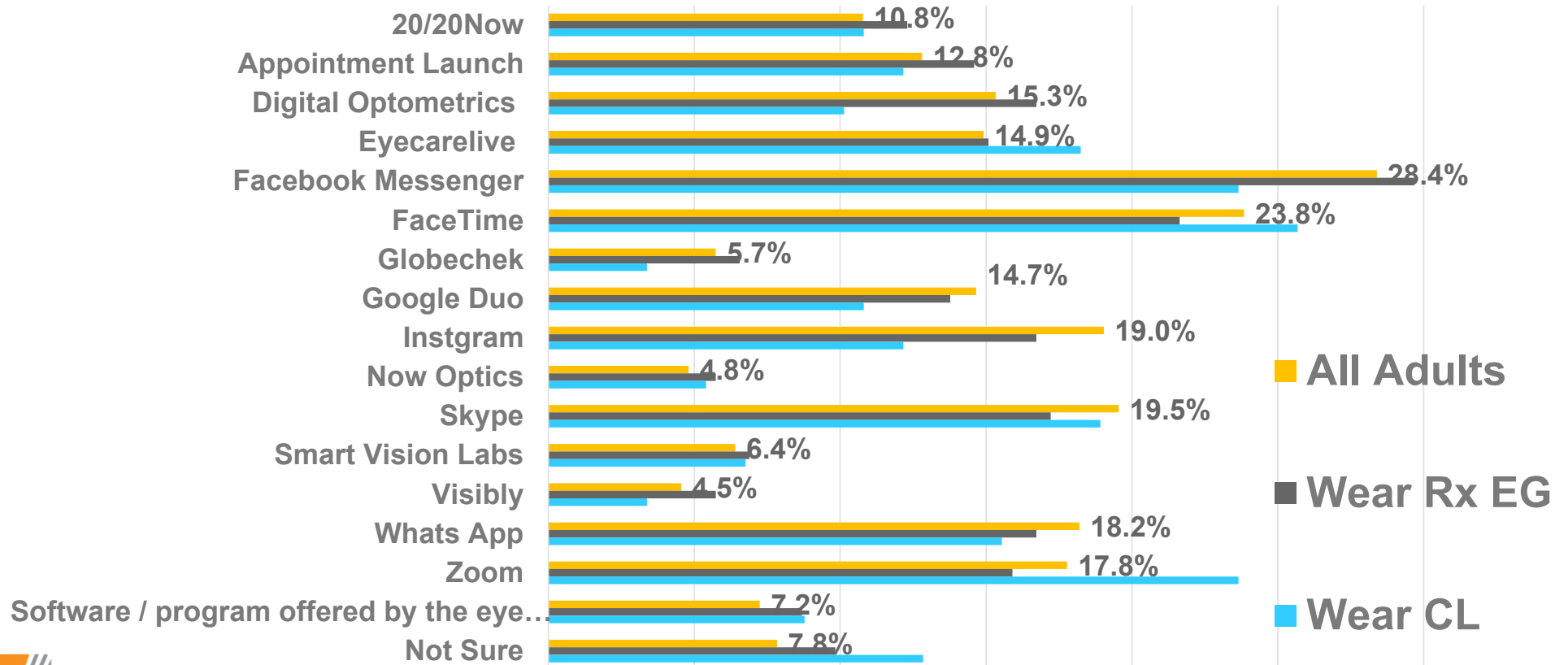
April 2020: How are you currently staying connected to your eye doctor for vision / eyecare needs during the COVID-19 crisis?



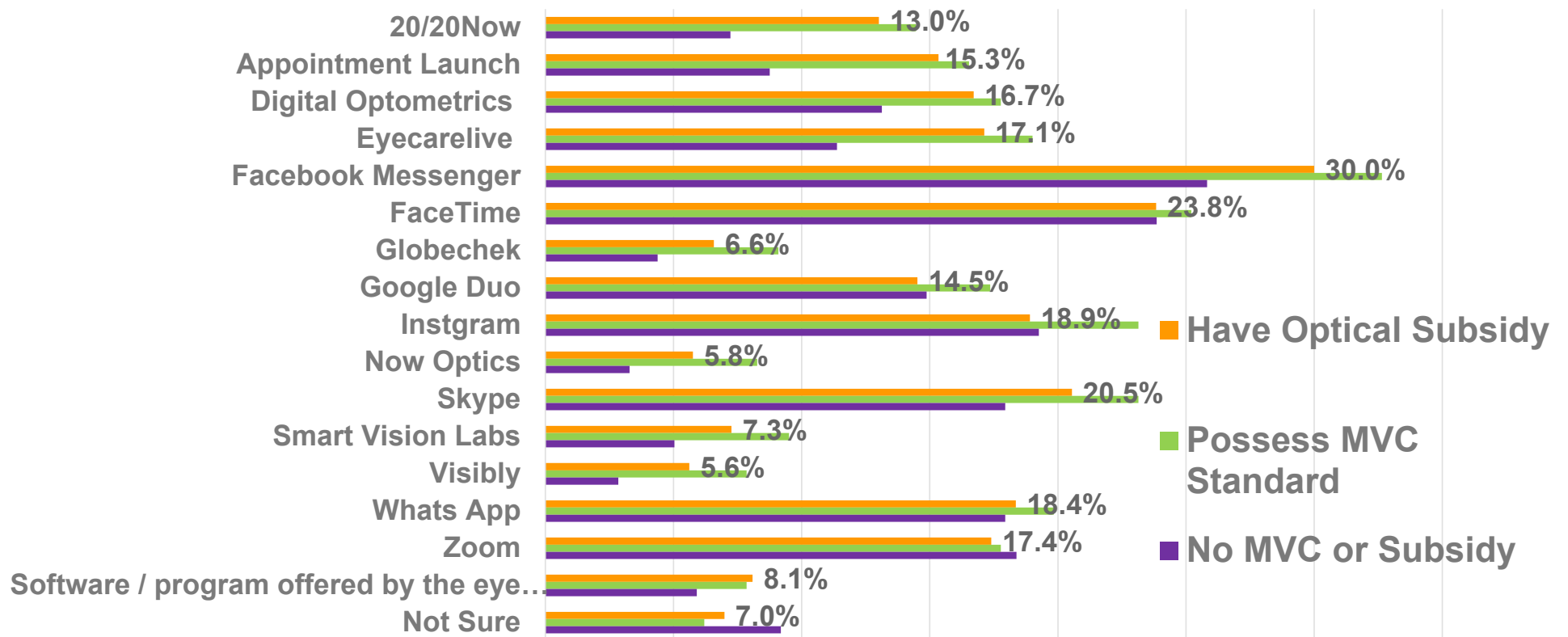
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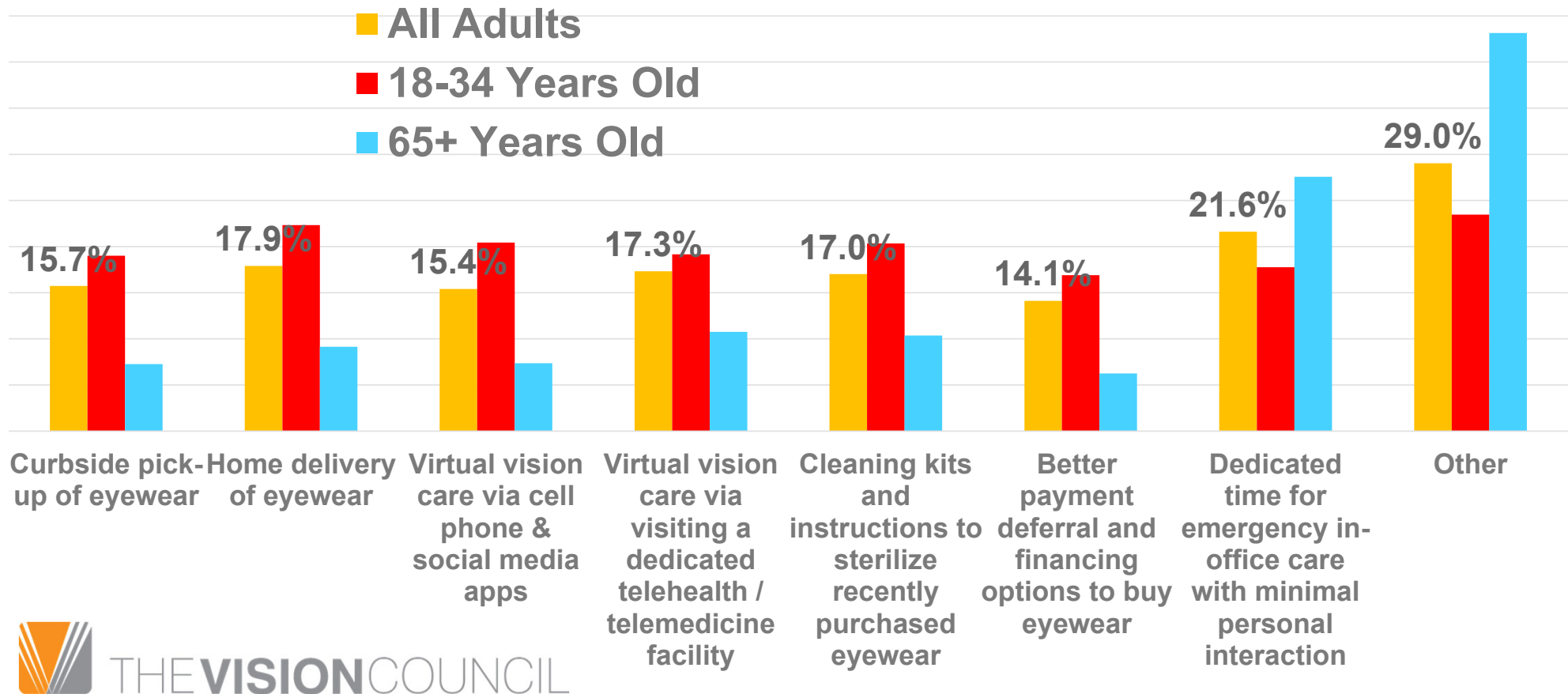
April 2020: Which specific program / platform are you using to stay connected to your eye doctor?



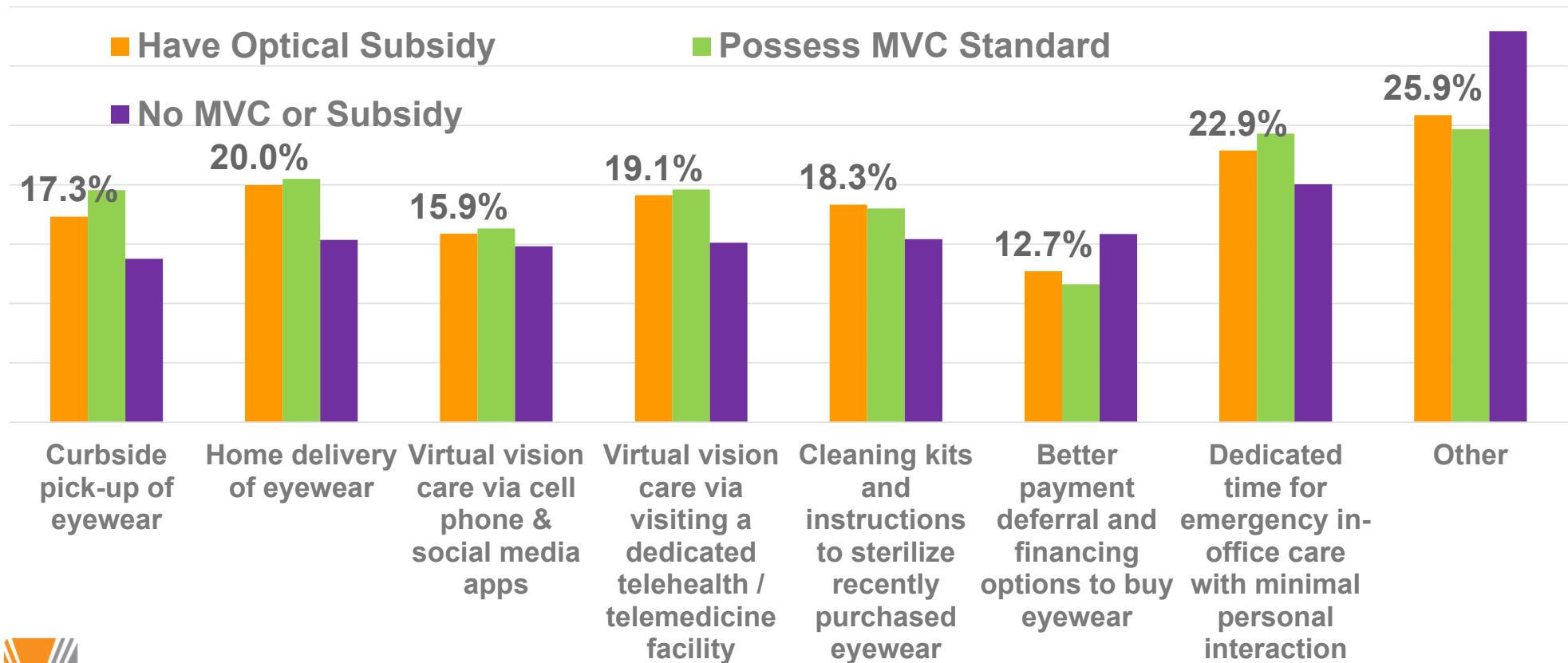
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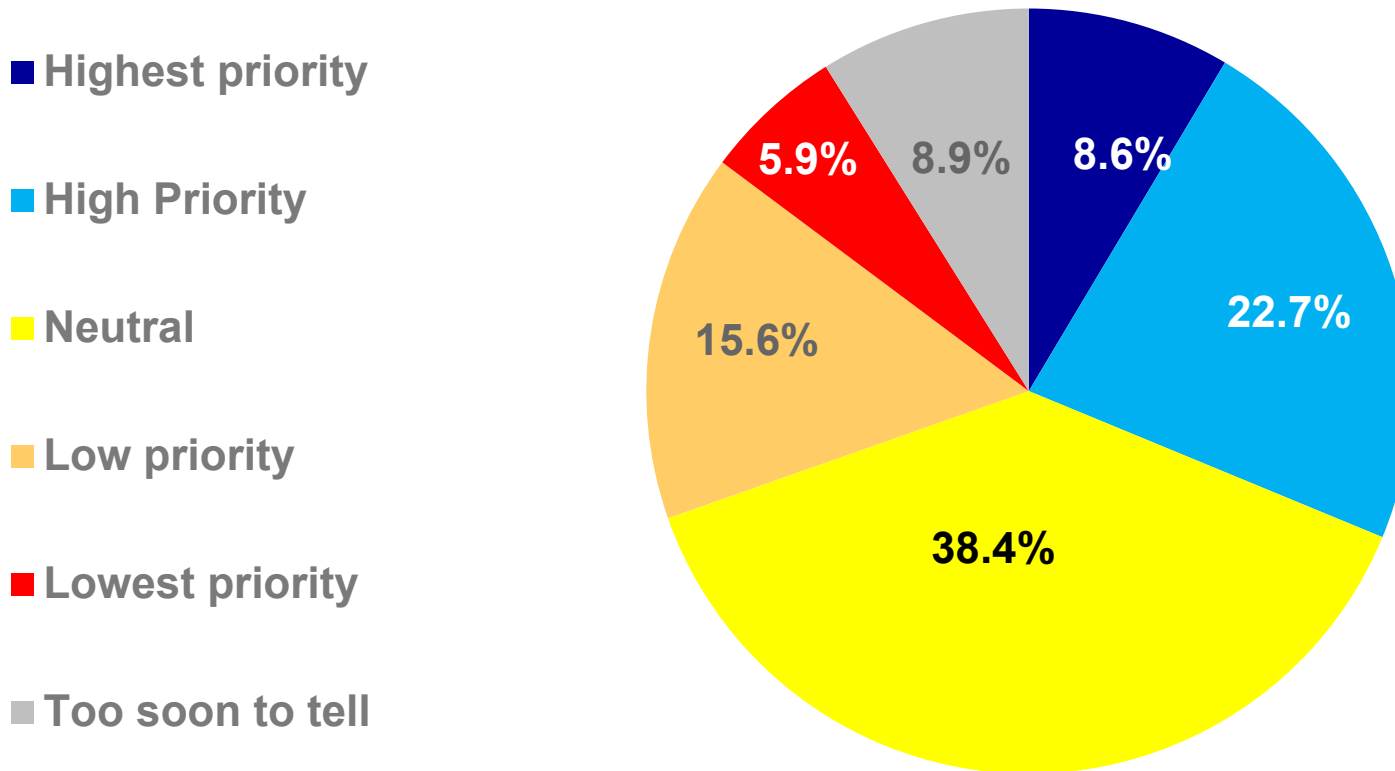
April 2020: Please indicate which of the services below you would like to see your eye doctor offer during the current COVID-19 crisis?



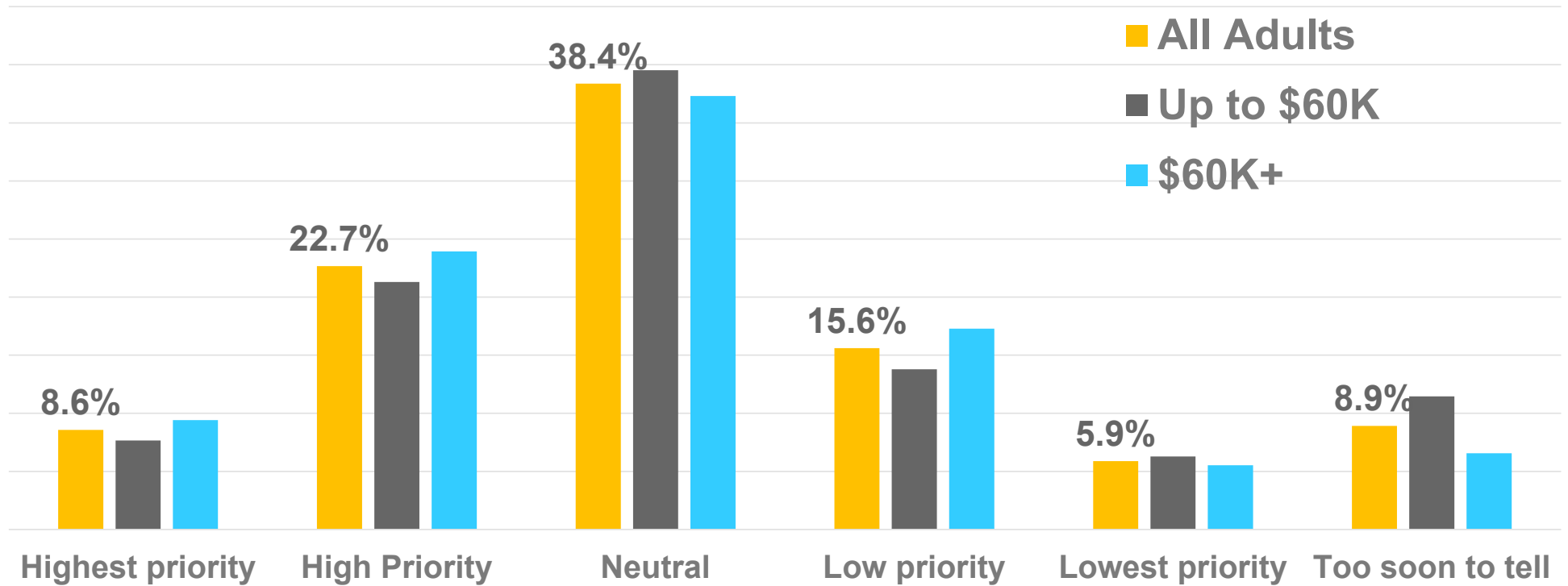
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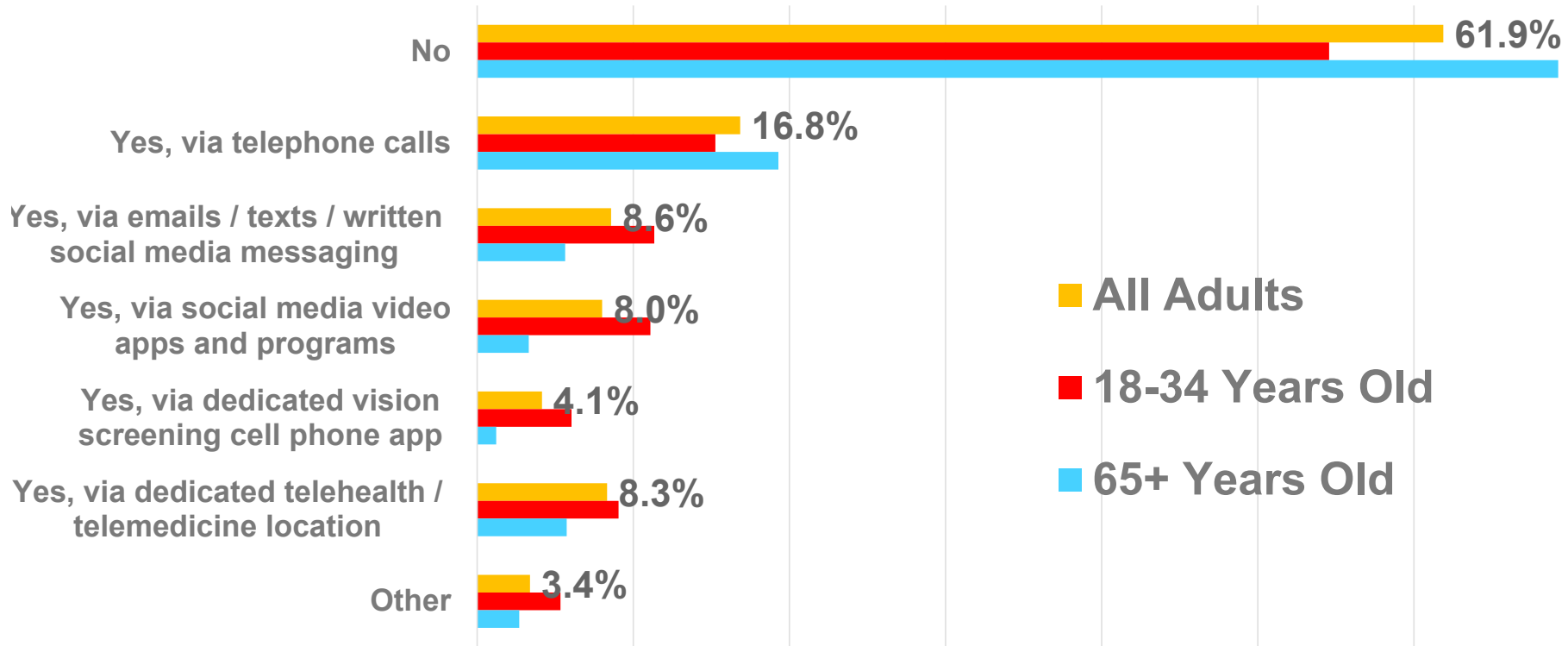
April 2020: How do you anticipate prioritizing your eye care needs, relative to other health concerns, once the current COVID-19 crisis is over?



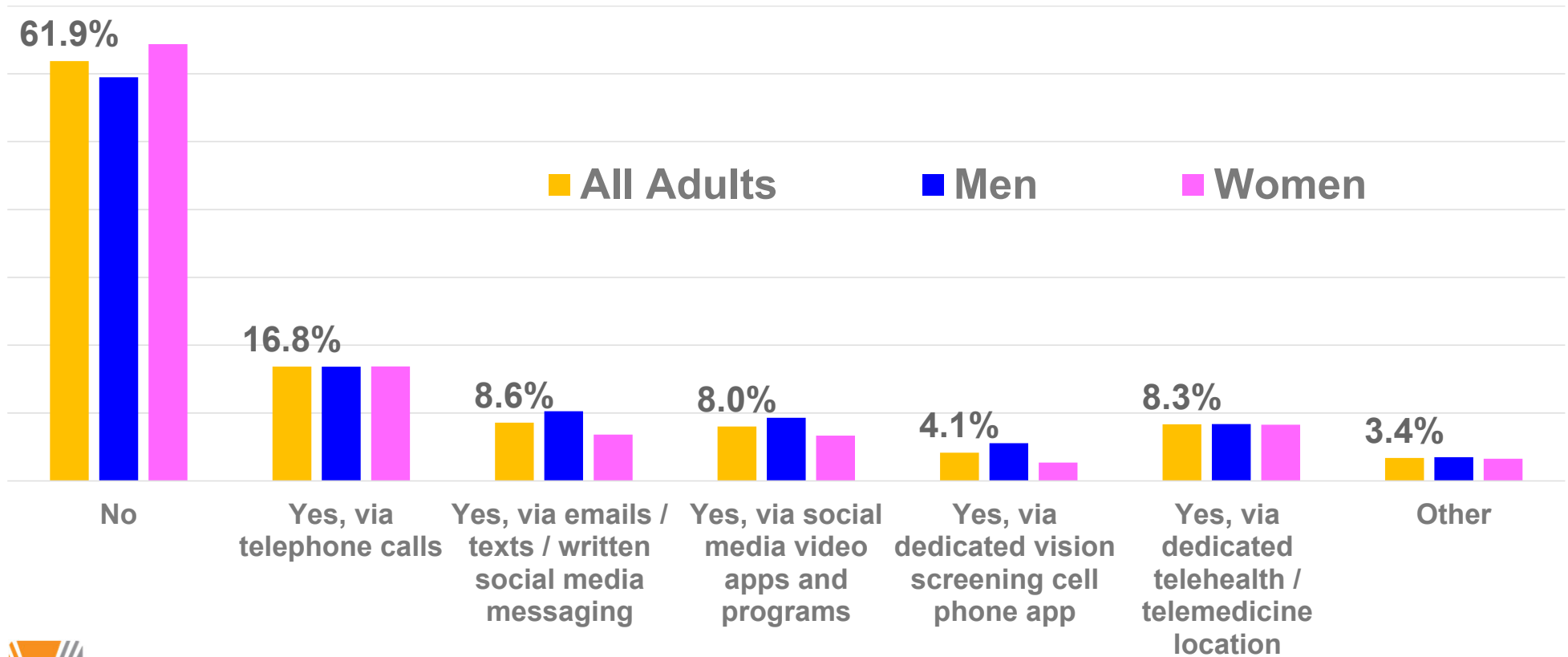
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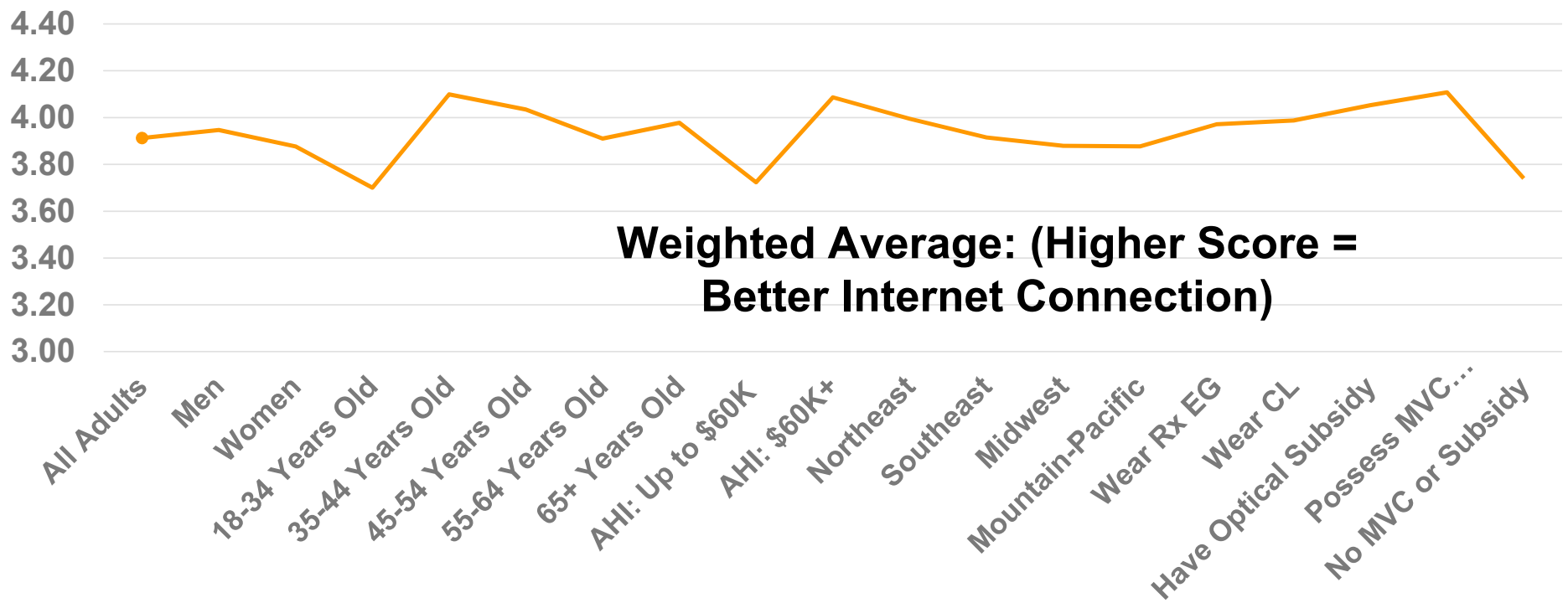
April 2020: Since the start of the COVID-19 crisis, have you connected with ANY doctors or medical personnel (not just eyecare) using live, real-time virtual communication?



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April 2020: How would you rate the quality of your internet connection / speed in your home residence?



VisionWatch April 2020 COVID-19 Consumer Study Data and Cross Tabs

Ask all respondents:

CV1: On a scale of 1-10 how concerned are you over the recent global coronavirus threat and outbreak? (Select one--Sliding scale from 1 to 10)

	<i>By Gender</i>		<i>By Age</i>					<i>By AHI</i>		<i>By Region</i>				<i>Wear Rx</i>		<i>Have Optical</i>	<i>Possess MVC</i>	<i>No MVC or</i>	
	<i>All Adults</i>	<i>Men</i>	<i>Women</i>	<i>18-34 Years Old</i>	<i>35-44 Years Old</i>	<i>45-54 Years Old</i>	<i>55-64 Years Old</i>	<i>65+ Years Old</i>	<i>Up to \$60K</i>	<i>\$60K+</i>	<i>Northeast</i>	<i>Southeast</i>	<i>Midwest</i>	<i>Mountain-Pacific</i>	<i>EG</i>	<i>Wear CL</i>	<i>Subsidy</i>	<i>Standard</i>	<i>Subsidy</i>
	A1. 1--No concern at all	1.8%	2.2%	1.3%	2.4%	1.6%	2.3%	1.7%	0.7%	2.3%	1.3%	0.8%	1.9%	2.2%	2.1%	1.6%	2.0%	1.5%	1.6%
A2. 2	2.0%	2.4%	1.6%	1.6%	1.5%	2.0%	3.1%	2.3%	2.2%	1.8%	1.2%	2.1%	2.3%	2.2%	2.0%	2.1%	1.9%	1.7%	2.2%
A3. 3	3.3%	3.8%	2.8%	3.4%	2.8%	3.2%	3.6%	3.4%	3.4%	3.2%	1.8%	3.6%	3.7%	3.5%	3.0%	3.1%	3.2%	3.1%	3.4%
A4. 4	3.1%	3.4%	2.9%	4.0%	3.0%	2.8%	2.9%	2.4%	3.2%	3.1%	1.6%	3.5%	3.8%	3.1%	2.9%	3.4%	3.0%	3.5%	3.3%
A5. 5	4.1%	4.1%	4.1%	4.8%	3.1%	4.7%	3.6%	3.8%	4.8%	3.5%	3.0%	4.3%	3.8%	4.9%	3.9%	3.3%	3.5%	3.2%	4.8%
A6. 6	6.1%	6.6%	5.6%	7.3%	5.7%	5.9%	6.1%	4.8%	6.2%	6.0%	4.9%	6.6%	6.5%	6.0%	5.6%	6.8%	5.6%	5.6%	6.8%
A7. 7	15.2%	15.6%	14.7%	19.0%	15.1%	14.5%	12.8%	11.5%	15.1%	15.3%	13.5%	15.0%	16.0%	16.0%	14.8%	16.8%	14.5%	15.7%	16.0%
A8. 8	21.5%	21.3%	21.7%	22.9%	20.4%	21.1%	20.3%	21.8%	20.5%	22.5%	23.4%	19.1%	22.1%	23.5%	21.9%	23.4%	21.8%	23.2%	21.2%
A9. 9	15.4%	15.3%	15.6%	13.6%	16.2%	14.7%	15.9%	17.9%	13.9%	16.9%	18.3%	15.1%	14.3%	14.8%	16.7%	15.1%	15.9%	16.5%	14.9%
A10. 10—Extremely concerned	27.4%	25.2%	29.6%	21.0%	30.4%	28.8%	30.1%	31.5%	28.5%	26.3%	31.6%	28.9%	25.2%	23.9%	27.6%	24.1%	29.2%	25.9%	25.2%
Weighted Average	6.769	6.620	6.924	6.482	6.943	6.770	6.802	7.040	6.703	6.830	7.212	6.741	6.611	6.628	6.846	6.680	6.884	6.803	6.628

Ask all respondents:

CV3. Will you postpone or cancel any eye exams or trips to the eye doctor while COVID-19 is still a threat? (Select One; Randomize A1-A5 and anchor A6)

	<i>By Gender</i>		<i>By Age</i>					<i>By AHI</i>		<i>By Region</i>				<i>Wear Rx</i>		<i>Have Optical</i>	<i>Possess MVC</i>	<i>No MVC or</i>	
	<i>All Adults</i>	<i>Men</i>	<i>Women</i>	<i>18-34 Years Old</i>	<i>35-44 Years Old</i>	<i>45-54 Years Old</i>	<i>55-64 Years Old</i>	<i>65+ Years Old</i>	<i>Up to \$60K</i>	<i>\$60K+</i>	<i>Northeast</i>	<i>Southeast</i>	<i>Midwest</i>	<i>Mountain-Pacific</i>	<i>EG</i>	<i>Wear CL</i>	<i>Subsidy</i>	<i>Standard</i>	<i>Subsidy</i>
	A1. Yes - I will cancel my exam/trip to the eye doctor	14.8%	14.6%	15.0%	18.0%	16.8%	14.4%	12.1%	9.9%	15.6%	14.0%	16.7%	15.9%	12.6%	13.4%	14.2%	13.3%	13.7%	12.3%
A2. Yes - I will postpone my exam/trip to the eye doctor	36.3%	33.5%	39.3%	34.5%	35.1%	39.0%	36.8%	38.1%	33.5%	39.0%	38.3%	35.2%	35.8%	37.1%	38.7%	43.4%	40.0%	42.2%	31.8%
A3. No - I will keep my originally scheduled exam / trip to the eye doctor	17.1%	19.5%	14.6%	13.7%	14.6%	18.0%	17.8%	23.8%	16.1%	18.1%	15.4%	16.9%	18.5%	17.4%	18.6%	18.3%	18.4%	20.0%	15.6%
A4. I will get a virtual eye screening using social media programs or visual acuity apps in place of an in-person exam at the doctor's office	3.0%	4.2%	1.8%	4.8%	5.5%	2.2%	0.7%	0.4%	2.9%	3.2%	2.6%	3.4%	2.9%	3.0%	2.5%	2.7%	3.2%	2.4%	2.9%
A5. I will get a full telemedicine eye exam at a dedicated remote telehealth location in place of an in-person exam at the doctor's office	3.2%	4.2%	2.2%	4.8%	5.3%	2.7%	1.2%	0.6%	3.1%	3.2%	4.1%	3.3%	1.9%	3.4%	2.7%	2.5%	3.4%	3.3%	2.9%
A6. Not Sure / Undecided currently	25.6%	24.1%	27.1%	24.1%	22.8%	23.6%	31.5%	27.3%	28.9%	22.5%	22.9%	25.2%	28.3%	25.7%	23.4%	19.8%	21.4%	19.8%	30.7%

Ask if Q71=A1 "Have children at home":

CV4. Will you postpone or cancel any eye exams or trips to the eye doctor **for your children** while COVID-19 is still a threat? (Select One; Randomize A1-A5 and anchor A6)

	<i>By Gender</i>		<i>By Age</i>					<i>By AHI</i>		<i>By Region</i>				<i>Wear Rx</i>		<i>Have Optical</i>	<i>Possess MVC</i>	<i>No MVC or</i>	
	<i>All Adults</i>	<i>Men</i>	<i>Women</i>	<i>18-34 Years Old</i>	<i>35-44 Years Old</i>	<i>45-54 Years Old</i>	<i>55-64 Years Old</i>	<i>65+ Years Old</i>	<i>Up to \$60K</i>	<i>\$60K+</i>	<i>Northeast</i>	<i>Southeast</i>	<i>Midwest</i>	<i>Mountain-Pacific</i>	<i>EG</i>	<i>Wear CL</i>	<i>Subsidy</i>	<i>Standard</i>	<i>Subsidy</i>
	A1. Yes - I will cancel my child's exam/trip to the eye doctor	18.6%	20.6%	16.6%	20.8%	18.5%	15.9%	15.7%	18.0%	18.5%	18.7%	19.7%	17.9%	18.1%	19.5%	18.2%	15.0%	17.5%	14.4%
A2. Yes - I will postpone my child's exam/trip to the eye doctor	36.9%	33.9%	39.9%	33.8%	37.4%	40.1%	44.7%	29.5%	35.2%	37.7%	35.0%	40.1%	34.5%	34.9%	39.7%	42.1%	39.6%	42.1%	32.4%
A3. No - I will keep my child's originally scheduled exam / trip to the eye doctor	11.5%	12.7%	10.3%	10.6%	11.5%	12.6%	13.8%	11.5%	10.3%	12.2%	10.1%	10.6%	14.5%	11.4%	11.5%	12.3%	12.4%	13.4%	10.1%
A4. I will get my child a virtual eye screening using social media programs or visual acuity apps in place of an in-person exam at the doctor's office	5.8%	7.5%	4.1%	6.9%	6.7%	4.1%	0.6%	0.0%	5.5%	6.0%	6.9%	6.5%	2.9%	6.5%	5.1%	4.3%	6.0%	4.7%	5.6%
A5. I will get my child a full telemedicine eye exam at a dedicated remote telehealth location in place of an in-person exam at the doctor's office	6.4%	8.2%	4.4%	6.4%	7.8%	5.3%	1.9%	1.6%	6.1%	6.5%	9.2%	6.7%	3.9%	5.8%	5.1%	4.3%	6.7%	6.5%	5.8%
A6. Not Sure / Undecided currently	20.8%	17.0%	24.7%	21.5%	18.2%	21.9%	23.3%	39.3%	24.3%	18.9%	19.2%	18.1%	26.0%	21.9%	20.4%	21.9%	17.8%	18.8%	25.8%

VisionWatch April 2020 COVID-19 Consumer Study Data and Cross Tabs

Ask if VWQ8=A1, A2 or A4 "Wear Rx EG, Rx SG and/or CL":

CV5: If you need new eyeglasses or contact lenses while coronavirus is still a threat, which of the following actions are you likely to take? (Select All That Apply; Rotate A1-A4; Anchor A5; A1 is mutually exclusive)

	<u>All Adults</u>	<u>By Gender</u>		<u>By Age</u>					<u>By AHI</u>		<u>By Region</u>				<u>Wear Rx EG</u>	<u>Wear CL</u>	<u>Have Optical Subsidy</u>	<u>Possess MVC Standard</u>	<u>No MVC or Subsidy</u>
		<u>Men</u>	<u>Women</u>	<u>18-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+ Years Old</u>	<u>Up to \$60K</u>	<u>\$60K+</u>	<u>Northeast</u>	<u>Southeast</u>	<u>Midwest</u>	<u>Mountain-Pacific</u>					
				<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>											
A1. Nothing, I will continue to purchase eyewear as I normally would.	19.3%	21.8%	16.8%	17.6%	16.5%	20.9%	22.5%	19.7%	19.5%	19.1%	14.9%	19.2%	21.1%	21.0%	19.4%	22.2%	19.3%	21.1%	19.2%
A2. I will postpone or cancel my purchase until conditions are better.	39.6%	36.6%	42.4%	33.5%	38.4%	39.8%	42.0%	46.2%	40.1%	39.1%	43.2%	39.0%	38.3%	38.8%	40.7%	30.2%	40.0%	38.8%	38.8%
A3. I will buy eyewear online to limit human interaction and physical contact.	17.7%	18.1%	17.3%	25.6%	26.6%	17.6%	9.8%	6.7%	15.6%	19.4%	18.7%	18.6%	16.4%	16.6%	16.8%	27.4%	18.3%	19.1%	16.6%
A4. I will take extra precautions (extra handwashing or wearing a face mask) when visiting the eye doctor or eyewear retailer.	27.6%	28.6%	26.6%	27.2%	28.9%	26.3%	27.4%	28.1%	25.5%	29.3%	27.3%	28.0%	27.8%	26.8%	27.2%	25.6%	28.7%	27.6%	25.5%
A5. Other	4.2%	3.9%	4.5%	6.4%	3.7%	3.2%	3.0%	3.6%	6.2%	2.6%	4.6%	4.3%	4.0%	3.9%	3.9%	3.8%	3.0%	2.1%	6.2%

If answered A2 to question CV5:

CV7: When do you anticipate buying eyewear in the future if you are postponing purchases during the COVID-19 crisis? (Select all that apply; please randomize A1-A6 and anchor A7).

	<u>All Adults</u>	<u>By Gender</u>		<u>By Age</u>					<u>By AHI</u>		<u>By Region</u>				<u>Wear Rx EG</u>	<u>Wear CL</u>	<u>Have Optical Subsidy</u>	<u>Possess MVC Standard</u>	<u>No MVC or Subsidy</u>
		<u>Men</u>	<u>Women</u>	<u>18-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+ Years Old</u>	<u>Up to \$60K</u>	<u>\$60K+</u>	<u>Northeast</u>	<u>Southeast</u>	<u>Midwest</u>	<u>Mountain-Pacific</u>					
				<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>											
A1. As soon as the crisis is over and my doctor's office is open again	33.4%	33.7%	33.1%	31.7%	32.0%	34.3%	33.2%	35.5%	34.2%	32.7%	34.9%	34.4%	32.7%	31.2%	33.4%	36.1%	34.6%	33.7%	31.2%
A2. After the COVID crisis is over and I feel comfortable going to the eye doctor in person to make a purchase	53.4%	50.3%	56.0%	48.2%	53.2%	53.2%	57.1%	55.9%	51.5%	55.1%	54.9%	51.3%	54.6%	54.5%	54.6%	49.7%	56.3%	59.2%	48.5%
A3. As soon as I have vision insurance / vision benefits to help reduce the cost of eyewear and eyecare services.	9.2%	11.7%	7.1%	16.2%	12.7%	7.0%	5.3%	4.5%	9.7%	8.7%	7.4%	10.6%	9.0%	8.5%	8.2%	8.2%	8.8%	8.3%	9.7%
A4. As soon as I have the funds available to buy the eyewear I need	12.0%	11.6%	12.4%	17.4%	12.9%	11.0%	12.0%	7.0%	15.1%	9.4%	10.0%	13.3%	13.6%	10.2%	11.8%	12.9%	9.4%	9.1%	16.6%
A5. As soon as I handle higher-priority health issues.	9.1%	11.1%	7.5%	13.7%	11.4%	8.4%	6.7%	5.5%	8.3%	9.8%	9.6%	9.6%	9.4%	7.6%	8.7%	8.6%	9.1%	7.7%	9.1%
A6. As soon as I can easily and confidently buy eyewear online	7.5%	10.8%	4.8%	11.0%	12.9%	8.8%	4.0%	2.3%	5.8%	9.0%	8.5%	8.2%	5.5%	7.5%	6.8%	8.6%	8.4%	9.5%	5.9%
A7. Other (See Appendix for Details)	4.0%	3.3%	4.5%	0.3%	2.1%	2.4%	6.5%	7.7%	4.1%	3.9%	3.3%	4.0%	4.0%	4.3%	4.1%	2.7%	3.5%	3.0%	4.8%

If answered A3 to question CV5:

CV8: If you purchase eyewear online in the near future, when would you expect your eyewear to be delivered to your home given the current COVID-19 crisis? (Select one)

	<u>All Adults</u>	<u>By Gender</u>		<u>By Age</u>					<u>By AHI</u>		<u>By Region</u>				<u>Wear Rx EG</u>	<u>Wear CL</u>	<u>Have Optical Subsidy</u>	<u>Possess MVC Standard</u>	<u>No MVC or Subsidy</u>
		<u>Men</u>	<u>Women</u>	<u>18-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+ Years Old</u>	<u>Up to \$60K</u>	<u>\$60K+</u>	<u>Northeast</u>	<u>Southeast</u>	<u>Midwest</u>	<u>Mountain-Pacific</u>					
				<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>											
A1. Within 2-3 days after placing the order	9.7%	12.0%	7.4%	8.5%	14.6%	10.4%	3.3%	6.1%	8.8%	10.3%	9.9%	12.3%	6.3%	8.3%	8.7%	10.0%	10.8%	9.7%	7.6%
A2. Within 4-6 days after placing the order	18.4%	22.4%	14.5%	18.3%	19.2%	20.9%	13.9%	17.2%	14.3%	21.2%	20.2%	19.3%	15.6%	18.1%	17.5%	15.3%	19.0%	19.0%	17.4%
A3. Within 7-10 days after placing the order	32.3%	31.7%	32.8%	31.7%	31.0%	28.4%	42.6%	34.3%	32.7%	31.9%	36.1%	32.2%	32.8%	28.6%	33.0%	37.5%	32.0%	33.5%	32.6%
A4. About 2 weeks after placing the order	26.0%	23.7%	28.3%	28.9%	19.5%	27.9%	25.4%	30.3%	29.1%	24.0%	22.3%	24.4%	30.1%	28.3%	26.9%	27.0%	26.8%	28.1%	24.5%
A5. About 3 weeks after placing the order	6.4%	5.7%	7.1%	6.5%	8.0%	3.5%	8.2%	4.0%	6.4%	6.4%	4.3%	7.0%	6.3%	7.2%	6.5%	3.5%	5.2%	5.1%	8.6%
A6. About one month after placing the order	4.9%	2.6%	7.2%	5.1%	4.3%	6.5%	3.3%	5.1%	5.2%	4.7%	3.9%	3.2%	7.0%	6.9%	5.1%	5.0%	4.3%	3.0%	6.0%
A7. More than one month after placing the order	2.3%	1.8%	2.7%	1.0%	3.4%	2.5%	3.3%	3.0%	3.4%	1.5%	3.4%	1.7%	2.0%	2.5%	2.3%	1.8%	1.7%	1.5%	3.2%

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Ask all respondents:

CV9: How has COVID-19 impacted your employment situation? (Select all that apply; please randomize A1-A6 and anchor A7 and A8; A8 is mutually exclusive)

	All Adults	By Gender		By Age					By AHI		By Region				Wear Rx		Have Optical	Possess MVC	No MVC or
		Men	Women	18-34 Years Old	35-44 Years Old	45-54 Years Old	55-64 Years Old	65+ Years Old	Up to \$60K	\$60K+	Northeast	Southeast	Midwest	Mountain-Pacific	EG	Wear CL	Subsidy	Standard	Subsidy
A1. I have recently lost my job	10.4%	9.8%	11.1%	15.3%	12.8%	9.3%	7.5%	3.5%	13.0%	8.0%	10.0%	10.1%	10.2%	11.4%	9.3%	10.8%	8.8%	7.9%	12.4%
A2. I have recently had my hours / work schedule cut	15.3%	16.6%	14.1%	18.9%	21.6%	16.2%	12.4%	5.1%	14.1%	16.5%	16.2%	14.6%	15.9%	15.5%	14.0%	18.4%	15.5%	15.9%	15.1%
A3. I anticipate losing my job in the near future	4.3%	5.2%	3.5%	6.7%	6.5%	3.7%	2.1%	0.7%	4.0%	4.6%	5.0%	4.1%	3.6%	4.8%	3.9%	4.6%	4.6%	4.7%	4.1%
A4. I anticipate having my hours cut in the near future	6.3%	7.8%	4.6%	8.9%	10.1%	6.4%	3.0%	0.8%	5.2%	7.2%	6.6%	6.5%	5.7%	6.1%	5.5%	5.8%	7.1%	7.1%	5.2%
A5. My wages / salary have been reduced / cut	11.7%	13.0%	10.2%	14.4%	16.6%	12.8%	9.4%	3.3%	10.7%	12.6%	12.1%	11.4%	11.0%	12.4%	10.9%	12.8%	11.5%	12.9%	11.9%
A6. My benefits have been reduced / cut	6.0%	8.2%	3.8%	8.7%	10.6%	4.8%	2.5%	1.1%	5.5%	6.5%	6.5%	6.2%	4.9%	6.4%	4.9%	4.7%	5.8%	5.7%	6.3%
A7. Other employment impact	9.9%	9.1%	10.8%	10.4%	11.8%	12.7%	10.4%	4.7%	8.9%	10.9%	9.8%	9.9%	11.0%	9.2%	9.6%	13.0%	9.8%	11.8%	10.1%
A8. Not applicable	50.5%	47.3%	53.8%	35.7%	35.3%	47.0%	61.2%	83.7%	51.3%	49.7%	49.3%	51.9%	50.3%	49.3%	54.9%	45.2%	51.6%	49.1%	49.2%

Ask if CV9 = A1 or A3:

CV10. Do you anticipate going back to your job, or getting an equivalent new one, once the COVID-19 crisis is over? (Select one; please randomize A1-A3 and anchor A4)

	All Adults	By Gender		By Age					By AHI		By Region				Wear Rx		Have Optical	Possess MVC	No MVC or
		Men	Women	18-34 Years Old	35-44 Years Old	45-54 Years Old	55-64 Years Old	65+ Years Old	Up to \$60K	\$60K+	Northeast	Southeast	Midwest	Mountain-Pacific	EG	Wear CL	Subsidy	Standard	Subsidy
A1. Yes, definitely	40.4%	39.3%	41.5%	37.9%	44.1%	44.4%	37.9%	39.7%	36.9%	44.8%	40.2%	40.6%	42.3%	38.7%	40.0%	44.2%	42.1%	45.8%	38.7%
A2. Yes, possibly	34.7%	37.8%	31.4%	39.4%	32.4%	26.3%	31.4%	32.1%	36.3%	32.7%	34.5%	36.0%	28.3%	37.9%	34.1%	32.6%	37.9%	34.8%	31.6%
A3. No	11.2%	11.7%	10.8%	11.3%	12.0%	9.3%	12.4%	10.3%	12.5%	9.7%	13.0%	11.1%	11.3%	10.1%	10.9%	7.4%	9.1%	8.3%	13.4%
A4. Not sure / Too soon to tell	13.7%	11.2%	16.3%	11.4%	11.5%	20.0%	18.3%	17.9%	14.4%	12.8%	12.3%	12.3%	18.0%	13.2%	15.0%	15.8%	11.0%	11.1%	16.3%

Ask all respondents:

CV11. Have you lost any vision insurance / vision benefits since the start of the COVID-19 crisis? (Select one)

	All Adults	By Gender		By Age					By AHI		By Region				Wear Rx		Have Optical	Possess MVC	No MVC or
		Men	Women	18-34 Years Old	35-44 Years Old	45-54 Years Old	55-64 Years Old	65+ Years Old	Up to \$60K	\$60K+	Northeast	Southeast	Midwest	Mountain-Pacific	EG	Wear CL	Subsidy	Standard	Subsidy
A1. Yes	6.5%	8.5%	4.3%	8.8%	12.2%	5.2%	3.0%	0.9%	5.3%	7.5%	8.3%	6.8%	5.3%	5.7%	6.0%	5.2%	7.6%	7.1%	5.0%
A2. No	88.3%	86.2%	90.4%	81.3%	83.2%	91.9%	94.0%	96.9%	87.4%	89.1%	86.2%	88.4%	89.6%	88.4%	89.9%	90.1%	89.7%	91.5%	86.5%
A3. Not Sure	5.3%	5.3%	5.2%	9.9%	4.6%	2.9%	3.1%	2.2%	7.3%	3.4%	5.5%	4.8%	5.1%	6.0%	4.1%	4.7%	2.7%	1.4%	8.4%

Ask if CV11 = A1

CV12. Do you anticipate getting your vision insurance / vision benefits back once the COVID-19 crisis is over? (Select one)

	All Adults	By Gender		By Age					By AHI		By Region				Wear Rx		Have Optical	Possess MVC	No MVC or
		Men	Women	18-34 Years Old	35-44 Years Old	45-54 Years Old	55-64 Years Old	65+ Years Old	Up to \$60K	\$60K+	Northeast	Southeast	Midwest	Mountain-Pacific	EG	Wear CL	Subsidy	Standard	Subsidy
A1. Yes	72.1%	77.1%	62.0%	70.4%	81.8%	72.6%	51.0%	27.8%	57.0%	81.9%	75.5%	77.9%	68.1%	61.0%	73.7%	67.1%	82.3%	83.6%	53.2%
A2. No	18.0%	16.7%	20.8%	22.9%	10.2%	15.5%	24.5%	38.9%	26.6%	12.5%	17.2%	14.8%	21.6%	22.0%	16.9%	18.4%	13.1%	11.8%	27.2%
A3. Not sure / Too soon to tell	9.8%	6.2%	17.2%	6.7%	8.1%	11.9%	24.5%	33.3%	16.3%	5.6%	7.3%	7.2%	10.3%	17.0%	9.4%	14.5%	4.6%	4.6%	19.6%

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Ask all respondents:

CV13. How are you currently staying connected to your eye doctor for vision / eyecare needs during the COVID-19 crisis? (Select all that apply; please randomize A1-A6 and anchor A7)

	All Adults	By Gender		By Age					By AHI		By Region				Wear Rx EG	Wear CL	Have Optical Subsidy	Possess MVC Standard	No MVC or Subsidy
		Men	Women	18-34 Years Old	35-44 Years Old	45-54 Years Old	55-64 Years Old	65+ Years Old	Up to \$60K	\$60K+	Northeast	Southeast	Midwest	Mountain-Pacific					
A1. In-person visits	7.5%	9.5%	5.3%	8.6%	9.6%	6.6%	4.5%	6.8%	7.2%	7.7%	7.1%	7.6%	6.7%	8.2%	7.8%	6.0%	8.3%	8.1%	6.4%
A2. Telephone calls	15.3%	18.4%	12.0%	18.0%	17.7%	13.1%	11.2%	13.5%	14.5%	15.9%	17.5%	15.5%	12.9%	15.3%	15.0%	16.0%	17.0%	15.2%	13.1%
A3. Emails / texts / written social media messaging	12.5%	15.2%	9.7%	14.8%	17.1%	12.1%	8.7%	7.9%	10.4%	14.4%	13.3%	12.9%	10.6%	13.1%	12.3%	15.0%	14.9%	15.9%	9.6%
A4. Social media video apps and programs (Zoom, FaceTime, Skype, etc...)	7.1%	9.8%	4.3%	11.2%	13.7%	5.0%	1.1%	0.6%	5.6%	8.5%	8.8%	7.5%	5.4%	6.8%	5.3%	6.2%	7.6%	6.8%	6.5%
A5. Dedicated vision screening cell phone app (Smart Vision, Visibly, etc...)	3.7%	5.4%	1.9%	5.8%	6.9%	2.8%	0.7%	0.2%	2.6%	4.7%	4.9%	3.9%	2.3%	3.5%	3.2%	3.2%	4.4%	4.3%	2.8%
A6. Dedicated telehealth / telemedicine location	3.5%	4.7%	2.3%	5.0%	6.5%	2.5%	1.3%	0.9%	2.4%	4.5%	3.8%	3.8%	2.7%	3.5%	3.4%	3.4%	4.4%	4.3%	2.4%
A7. Not currently staying connected to my eye doctor	64.7%	56.8%	72.8%	55.3%	56.8%	68.6%	76.7%	74.4%	66.5%	63.0%	61.6%	64.2%	68.9%	63.9%	65.9%	64.0%	60.7%	63.2%	69.5%

Ask if CV13 = A4, A5 AND/OR A6:

CV14. Which specific program / platform are you using to stay connected to your eye doctor? (Select all that apply)

	All Adults	By Gender		By Age					By AHI		By Region				Wear Rx EG	Wear CL	Have Optical Subsidy	Possess MVC Standard	No MVC or Subsidy
		Men	Women	18-34 Years Old	35-44 Years Old	45-54 Years Old	55-64 Years Old	65+ Years Old	Up to \$60K	\$60K+	Northeast	Southeast	Midwest	Mountain-Pacific					
A1. 20/20Now	10.8%	11.9%	8.3%	11.3%	11.1%	9.0%	8.9%	6.5%	9.5%	11.6%	11.0%	12.1%	8.5%	9.9%	12.3%	10.8%	13.0%	14.5%	7.2%
A2. Appointment Launch	12.8%	14.8%	8.3%	10.8%	14.2%	17.9%	11.1%	12.9%	9.9%	14.7%	13.4%	12.5%	12.7%	12.8%	14.6%	12.2%	15.3%	16.5%	8.8%
A3. Digital Optometrics	15.3%	18.2%	8.8%	13.1%	19.7%	16.4%	11.1%	3.2%	10.1%	18.7%	19.7%	13.8%	15.9%	13.6%	16.7%	10.1%	16.7%	17.8%	13.1%
A4. Eyecarelive	14.9%	15.7%	13.2%	13.7%	18.2%	14.2%	11.1%	3.2%	12.3%	16.6%	17.7%	13.6%	10.1%	17.9%	15.1%	18.2%	17.1%	19.0%	11.4%
A5. Facebook Messenger	28.4%	31.2%	22.0%	22.5%	36.2%	38.1%	13.3%	19.4%	20.6%	33.4%	29.5%	28.2%	27.0%	28.6%	29.7%	23.6%	30.0%	32.6%	25.8%
A6. FaceTime	23.8%	24.9%	21.5%	25.9%	24.3%	16.4%	26.7%	6.5%	24.7%	23.3%	23.6%	23.8%	16.9%	28.9%	21.6%	25.7%	23.8%	25.2%	23.9%
A7. Globechek	5.7%	6.6%	3.9%	5.5%	7.1%	5.2%	0.0%	3.2%	2.6%	7.8%	7.1%	5.9%	4.8%	4.8%	6.6%	3.4%	6.6%	9.1%	4.4%
A8. Google Duo	14.7%	17.1%	9.1%	13.1%	18.0%	15.7%	4.4%	12.9%	12.9%	15.8%	14.6%	16.8%	12.7%	12.5%	13.8%	10.8%	14.5%	17.4%	14.9%
A9. Instagram	19.0%	21.8%	12.7%	19.1%	22.5%	16.4%	6.7%	3.2%	15.5%	21.3%	22.8%	17.8%	16.9%	19.0%	16.7%	12.2%	18.9%	23.1%	19.3%
A10. Now Optics	4.8%	5.5%	3.3%	4.8%	4.3%	7.5%	2.2%	3.2%	2.8%	6.1%	5.5%	4.0%	4.8%	5.5%	5.7%	5.4%	5.8%	8.3%	3.3%
A11. Skype	19.5%	22.6%	12.7%	16.8%	24.1%	25.4%	8.9%	3.2%	11.4%	24.8%	20.5%	22.1%	12.2%	19.4%	17.2%	18.9%	20.5%	23.1%	17.9%
A12. Smart Vision Labs	6.4%	7.3%	4.4%	5.5%	9.1%	4.5%	2.2%	3.2%	4.1%	7.9%	9.1%	5.9%	5.3%	5.5%	6.9%	6.8%	7.3%	9.5%	5.0%
A13. Visibly	4.5%	5.1%	3.3%	4.5%	5.6%	4.5%	0.0%	0.0%	3.0%	5.5%	4.7%	6.4%	1.1%	3.7%	5.7%	3.4%	5.6%	7.9%	2.8%
A14. Whats App	18.2%	21.4%	11.0%	11.9%	28.9%	20.1%	11.1%	3.2%	8.4%	24.5%	24.8%	17.2%	11.1%	18.7%	16.7%	15.5%	18.4%	19.8%	17.9%
A15. Zoom	17.8%	17.1%	19.3%	17.5%	18.0%	17.9%	22.2%	12.9%	15.1%	19.5%	16.1%	17.4%	13.2%	23.1%	15.9%	23.6%	17.4%	17.8%	18.4%
A16. Software / program offered by the eye doctor's office	7.2%	7.5%	6.6%	5.8%	7.3%	5.2%	13.3%	32.3%	6.2%	7.9%	8.3%	8.1%	6.3%	5.5%	8.7%	8.8%	8.1%	7.9%	5.9%
A17. Not Sure	7.8%	5.3%	13.5%	6.9%	6.8%	9.0%	15.6%	22.6%	11.4%	5.5%	5.5%	7.9%	10.1%	8.4%	9.8%	12.8%	7.0%	6.2%	9.2%

Ask all respondents:

CV15: Please indicate which of the services below you would like to see your eye doctor offer during the current COVID-19 crisis? (Select all that apply; please randomize A1-A7 and anchor A8)

	All Adults	By Gender		By Age					By AHI		By Region				Wear Rx EG	Wear CL	Have Optical Subsidy	Possess MVC Standard	No MVC or Subsidy
		Men	Women	18-34 Years Old	35-44 Years Old	45-54 Years Old	55-64 Years Old	65+ Years Old	Up to \$60K	\$60K+	Northeast	Southeast	Midwest	Mountain-Pacific					
A1. Curbside pick-up of eyewear purchased from your ECP	15.7%	14.3%	17.3%	19.0%	20.6%	17.0%	12.5%	7.3%	13.7%	17.6%	15.6%	16.2%	16.1%	14.9%	16.4%	22.2%	17.3%	19.6%	13.8%
A2. Home delivery of eyewear purchased from your ECP	17.9%	18.6%	17.2%	22.3%	22.1%	18.5%	14.2%	9.1%	16.3%	19.4%	17.5%	18.2%	17.5%	18.1%	19.0%	24.4%	20.0%	20.5%	15.4%
A3. Virtual vision care via cell phone and social media apps	15.4%	16.8%	14.0%	20.4%	20.8%	14.5%	9.7%	7.4%	14.3%	16.4%	15.5%	16.3%	13.5%	15.6%	14.1%	16.5%	15.9%	16.3%	14.8%
A4. Virtual vision care via visiting a dedicated telehealth / telemedicine facility with eye exam equipment, staffed by a technician & connected to a remote ECP	17.3%	17.2%	17.5%	19.2%	22.2%	17.1%	16.1%	10.8%	15.6%	19.0%	18.5%	18.2%	15.8%	16.6%	17.3%	19.8%	19.1%	19.6%	15.1%
A5. Cleaning kits and instructions to sterilize recently purchased eyewear	17.0%	17.7%	16.3%	20.3%	19.5%	16.9%	15.8%	10.4%	16.6%	17.4%	16.4%	16.9%	17.3%	17.4%	18.8%	17.1%	18.3%	18.0%	15.4%
A6. Better payment deferral and financing options to buy eyewear	14.1%	14.0%	14.2%	16.9%	18.2%	14.7%	12.6%	6.2%	16.0%	12.4%	12.8%	15.2%	13.6%	13.9%	13.7%	13.6%	12.7%	11.6%	15.9%
A7. Dedicated time for emergency in-office care with minimal personal interaction	21.6%	19.5%	23.8%	17.8%	18.8%	22.0%	25.0%	27.6%	19.1%	23.9%	22.1%	22.4%	22.7%	19.1%	23.4%	22.6%	22.9%	24.3%	20.1%
A8. Other	29.0%	27.9%	30.2%	23.5%	23.2%	27.5%	31.4%	43.1%	32.0%	26.3%	27.4%	28.7%	29.1%	30.7%	27.2%	21.7%	25.9%	24.7%	32.9%

VisionWatch April 2020 COVID-19 Consumer Study Data and Cross Tabs

Ask all respondents:

CV16: How do you anticipate prioritizing your eye care needs, relative to other health concerns, once the current COVID-19 crisis is over? (Select one)

	<u>All Adults</u>	<u>By Gender</u>		<u>By Age</u>					<u>By AHI</u>		<u>By Region</u>				<u>Wear Rx</u>		<u>Have Optical</u>	<u>Possess MVC</u>	<u>No MVC or</u>
		<u>Men</u>	<u>Women</u>	<u>18-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+ Years</u>	<u>Up to \$60K</u>	<u>\$60K+</u>	<u>Northeast</u>	<u>Southeast</u>	<u>Midwest</u>	<u>Mountain-Pacific</u>	<u>EG</u>	<u>Wear CL</u>	<u>Subsidy</u>	<u>Standard</u>	<u>Subsidy</u>
				<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Old</u>											
A1. Highest priority	8.6%	10.0%	7.1%	9.0%	14.0%	9.2%	5.5%	4.6%	7.7%	9.4%	9.5%	10.3%	6.6%	6.8%	8.5%	7.6%	10.2%	7.7%	6.6%
A2. High Priority	22.7%	23.0%	22.3%	19.2%	22.6%	22.0%	22.9%	28.7%	21.3%	23.9%	22.6%	22.9%	21.8%	23.0%	25.3%	25.2%	25.4%	25.2%	19.3%
A3. Neutral	38.4%	38.1%	38.7%	37.9%	34.9%	39.4%	41.6%	39.0%	39.5%	37.3%	37.7%	37.7%	39.5%	38.9%	39.3%	39.5%	38.1%	38.5%	38.7%
A4. Low priority	15.6%	15.3%	15.9%	16.8%	15.7%	16.2%	15.0%	13.6%	13.8%	17.3%	16.3%	13.9%	17.0%	16.6%	15.5%	17.7%	15.4%	18.5%	15.9%
A5. Lowest priority	5.9%	5.2%	6.6%	7.9%	6.0%	5.0%	4.8%	4.2%	6.3%	5.5%	5.3%	5.8%	5.9%	6.4%	3.9%	3.8%	4.2%	4.3%	8.0%
A6. Too soon to tell	8.9%	8.3%	9.5%	9.2%	6.9%	8.2%	10.2%	9.8%	11.5%	6.6%	8.7%	9.3%	9.1%	8.2%	7.5%	6.2%	6.7%	5.8%	11.6%

Ask all respondents:

CV17: Since the start of the COVID-19 crisis, have you connected with ANY doctors or medical personnel (not just eyecare) using live, real-time virtual communication? (Select all that apply; please randomize A2-A6 and anchor A1 and A7)

	<u>All Adults</u>	<u>By Gender</u>		<u>By Age</u>					<u>By AHI</u>		<u>By Region</u>				<u>Wear Rx</u>		<u>Have Optical</u>	<u>Possess MVC</u>	<u>No MVC or</u>
		<u>Men</u>	<u>Women</u>	<u>18-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+ Years</u>	<u>Up to \$60K</u>	<u>\$60K+</u>	<u>Northeast</u>	<u>Southeast</u>	<u>Midwest</u>	<u>Mountain-Pacific</u>	<u>EG</u>	<u>Wear CL</u>	<u>Subsidy</u>	<u>Standard</u>	<u>Subsidy</u>
				<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Old</u>											
A1. No	61.9%	59.5%	64.4%	54.6%	56.1%	65.1%	71.1%	69.2%	63.0%	60.8%	59.4%	61.2%	66.1%	61.1%	63.7%	63.5%	59.4%	64.0%	64.9%
A2. Yes, via telephone calls	16.8%	16.8%	16.9%	15.3%	18.5%	16.0%	16.0%	19.3%	16.4%	17.3%	18.0%	16.3%	15.7%	17.9%	17.5%	15.8%	18.6%	15.7%	14.7%
A3. Yes, via emails / texts / written social media messaging	8.6%	10.3%	6.8%	11.3%	10.6%	8.0%	4.8%	5.6%	6.8%	10.3%	8.9%	8.8%	7.6%	8.8%	8.0%	7.4%	9.6%	9.4%	7.3%
A4. Yes, via social media video apps and programs (Zoom, FaceTime, Skype, etc...)	8.0%	9.3%	6.7%	11.1%	12.1%	7.4%	3.3%	3.3%	6.7%	9.2%	9.0%	8.0%	6.6%	8.6%	7.2%	8.1%	8.8%	8.4%	7.1%
A5. Yes, via dedicated vision screening cell phone app (Smart Vision Labs, Visibly, etc...)	4.1%	5.5%	2.7%	6.0%	6.5%	4.0%	1.3%	1.2%	3.4%	4.9%	4.5%	4.1%	3.5%	4.6%	3.6%	4.0%	4.7%	4.1%	3.5%
A6. Yes, via dedicated telehealth / telemedicine location	8.3%	8.4%	8.3%	9.1%	11.1%	8.5%	6.5%	5.7%	7.6%	9.0%	8.7%	9.8%	6.5%	7.3%	8.5%	10.0%	9.7%	9.8%	6.7%
A7. Other	3.4%	3.5%	3.3%	5.3%	2.8%	2.1%	2.3%	2.7%	4.4%	2.4%	3.0%	3.8%	3.0%	3.3%	2.7%	2.7%	2.4%	2.3%	4.6%

Ask all respondents:

CV18: How would you rate the quality of your internet connection / speed in your home residence? (Select one)

	<u>All Adults</u>	<u>By Gender</u>		<u>By Age</u>					<u>By AHI</u>		<u>By Region</u>				<u>Wear Rx</u>		<u>Have Optical</u>	<u>Possess MVC</u>	<u>No MVC or</u>
		<u>Men</u>	<u>Women</u>	<u>18-34</u>	<u>35-44</u>	<u>45-54</u>	<u>55-64</u>	<u>65+ Years</u>	<u>Up to \$60K</u>	<u>\$60K+</u>	<u>Northeast</u>	<u>Southeast</u>	<u>Midwest</u>	<u>Mountain-Pacific</u>	<u>EG</u>	<u>Wear CL</u>	<u>Subsidy</u>	<u>Standard</u>	<u>Subsidy</u>
				<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Years Old</u>	<u>Old</u>											
A1. Excellent	33.8%	35.5%	32.0%	28.7%	41.0%	38.6%	32.4%	32.3%	28.3%	38.9%	35.7%	35.2%	32.0%	32.0%	34.7%	34.7%	38.0%	38.5%	28.7%
A2. Good	40.4%	39.9%	41.0%	38.2%	39.2%	39.7%	42.0%	44.6%	38.9%	41.9%	41.3%	39.1%	41.2%	41.2%	41.8%	42.6%	40.6%	42.0%	40.2%
A3. Average	17.7%	16.7%	18.6%	21.1%	14.0%	15.5%	17.8%	17.4%	21.9%	13.8%	16.2%	17.2%	18.8%	18.5%	16.8%	16.4%	15.6%	15.0%	20.2%
A4. Poor	4.3%	4.1%	4.5%	6.2%	3.2%	3.2%	4.2%	3.1%	5.4%	3.2%	3.8%	4.4%	4.2%	4.5%	3.7%	3.3%	3.5%	2.9%	5.2%
A5. Very Bad	1.2%	1.1%	1.3%	2.1%	0.7%	1.1%	0.7%	0.7%	1.4%	1.0%	0.7%	1.1%	1.5%	1.4%	1.0%	1.2%	0.9%	0.7%	1.6%
A6. Not applicable / No home internet connection	2.6%	2.6%	2.6%	3.7%	1.8%	2.0%	3.0%	1.9%	4.1%	1.3%	2.2%	3.0%	2.4%	2.5%	2.0%	1.8%	1.4%	0.9%	4.1%
Weighted Average (Higher Score = Better Internet Connection)	3.91	3.95	3.88	3.70	4.10	4.03	3.91	3.98	3.72	4.09	4.00	3.92	3.88	3.88	3.97	3.99	4.05	4.11	3.74

Custom Consumer Research Opportunities

- **Monthly** custom slots allow companies to ask questions that are important to their needs. Results are proprietary and confidential!
- **Ideal for:** product concept testing, campaign testing, consumer sentiment testing
- **Customized:** Questions designed by professionals to meet your objectives, asked of your specific target group
- **Repeatable:** Easy to see trending and changes over time
- **Part of VisionWatch:** Data can be cross-tabbed with already existing VisionWatch questions.
- **Analyzed Results:** By people who understand the industry and how to present results and implications
- **Cost Effective:** Offers “Air-Time” (8-10 questions) with consumers for a nominal fee that would be expensive to do otherwise.
- **Expert Input:** Project goals and objectives (including questionnaire and report output) are developed in conjunction with The Vision Council Market Research Team who can provide guidance and input on the project for your team.

Custom Research Opportunities Continued...

- **List of Recent VisionWatch Custom Consumer Reports of Interest to The Industry**
 - The Contact Lens Subscription Report
 - Ocular Telemedicine Services (OTS) Report
 - MVC Usage and Behavior Study
 - Parent-Child Vision Care Report
 - Consumer Technology Study
 - **Other Custom Research Opportunities**
 - Custom ECP and Retailer Surveys
 - Buying Groups, Technology Adoption, Sales Trends, Pricing
 - Manufacturer / Supplier / TVC Member Surveys
 - Volunteer Participant “Retailer” Tracking Studies
 - Shipments Programs, Benchmarking, LPT Tracker, etc....



THE VISION COUNCIL

QUESTIONS?

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