

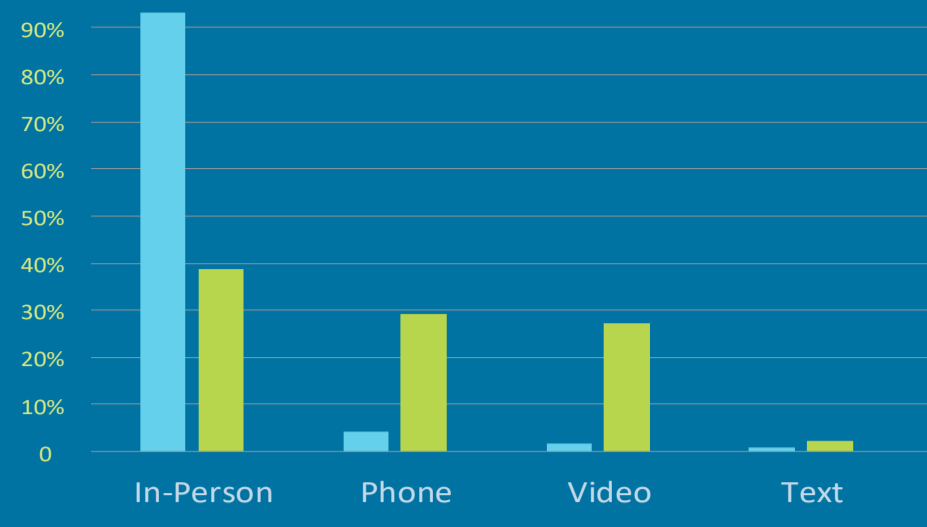
# Panel Perspectives

We recently surveyed 1000+ Healthcare Professionals to find out how their practices have changed since the onset of COVID-19.

As expected, prior to the pandemic the vast majority of patient interactions were conducted **in person**.

Today, that number has been **reduced** by more than **half** with patient interactions by phone and video increasing **7x** and **15x** respectively to be about **equal** in prevalence.

Percentage of Patient Interactions by Type: Pre-Pandemic vs. Current



**Location** has impacted the level of **decline** for in-person visits:

**Northeast:** In-person visits declined by **70%**

**Other regions:** In-person visits declined by **55%**

In-person patient interactions represent a **higher** percentage of patient interactions for **Eyecare Professionals**.



**Pre-pandemic: 96%** (v 92% other HCPs).

**Current: 45%** (v 35% other HCPs).

There are Regional differences in Current technology usage. The **South** uses **Video** more frequently than Phone:

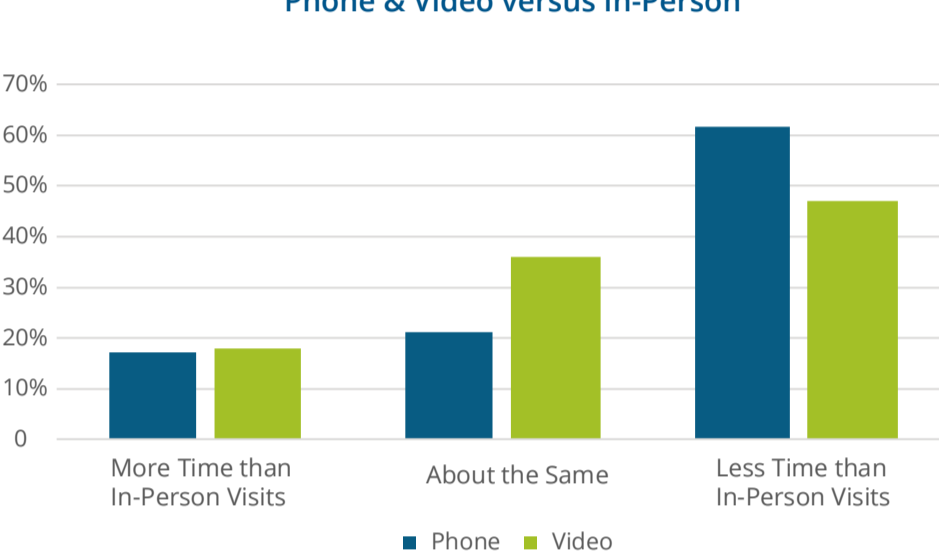


There are Specialty differences in Current technology usage:



For **most** HCPs, patient interactions by phone or video are **shorter in length** than in-person visits, although about **1/3** of HCPs report that video visits take about the **same time** as in-person visits.

Length of Patient Interaction Comparison: Phone & Video versus In-Person



**40%**

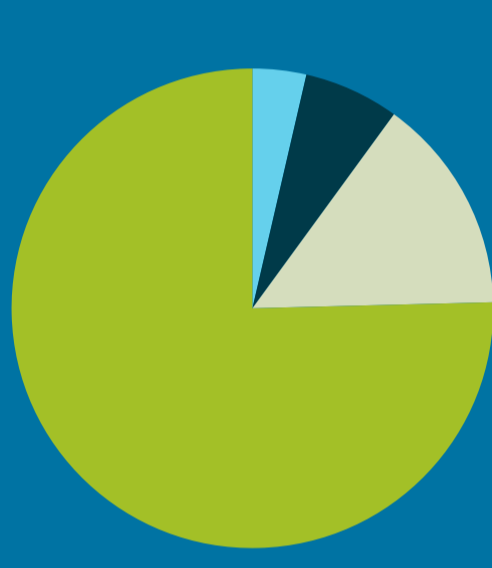
of **primary, general and family care** providers report video visits as being the **same length** as **in-person** visits.



**75%** of HCPs report having significantly **fewer patient interactions** since the pandemic. This varies greatly by specialty with **94%** of **Eyecare Professionals** and **90%** of HCPs specializing in **Elective Procedures** reporting significant **declines**.



Number of Patient Interactions



Interestingly, there are minimal regional differences reported in this decline:

Northeast	<b>75%</b>
South	<b>77%</b>
Midwest	<b>77%</b>
West	<b>72%</b>

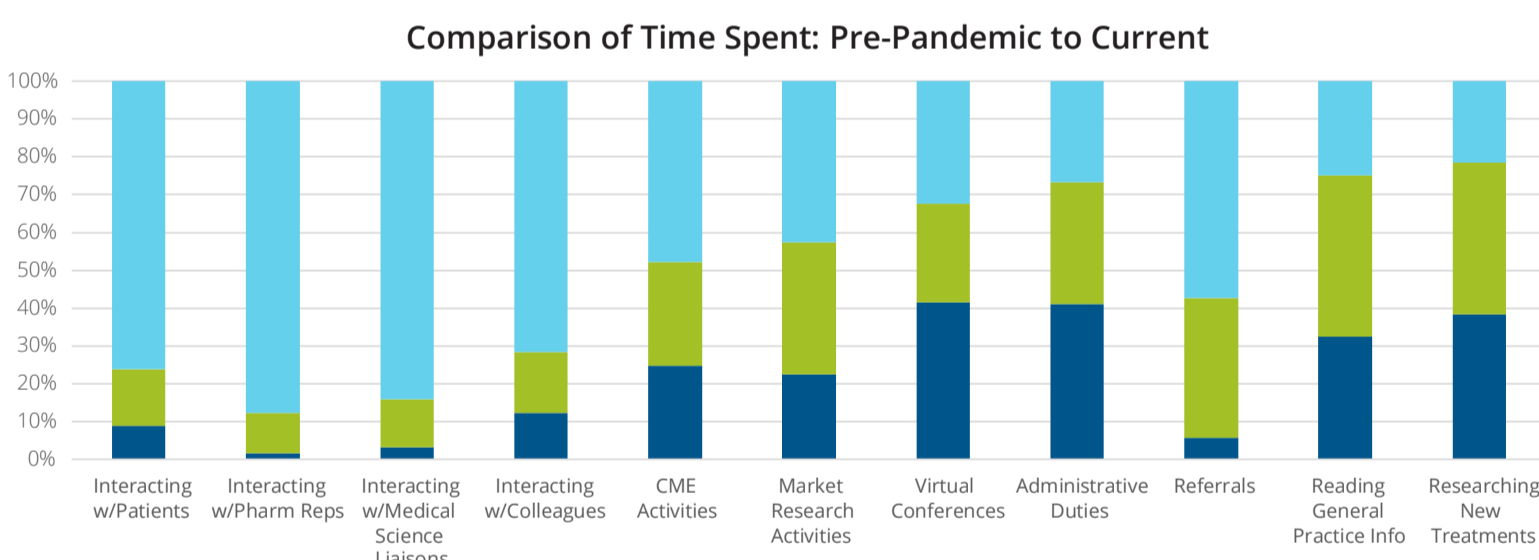
Legend for Number of Patient Interactions:

- More Patient Interactions
- About the Same Patient Interactions
- Slightly Less Patient Interactions
- Significantly Less Patient Interactions

So how are HCPs **spending their time**? **Top areas** for increased time spent are:

- Doing administrative duties
- Participating in virtual conferences
- Researching new treatments
- Reading more practice information
- Participating in CME activities

Comparison of Time Spent: Pre-Pandemic to Current



**Three quarters** of HCPs think the use of **Telehealth** will **increase** in the future.



**25%**

Go back to the pre-pandemic rates



**48.6%**

Increase Slightly



**26.1%**

Increase Significantly

There are some specialty differences in predictions regarding Telehealth's future:



HCPs specializing in **Eyecare and Elective Procedures** are more likely to think telehealth will **go back** to pre-pandemic rates (**32%** and **30%**).

**Primary care and Specialists** are more likely to think telehealth will **increase significantly** (**27%** and **28%**).

When asked for advice about the use of Telehealth, HCP comments typically fell into five categories\*

**29%** Use it Appropriately

**Positives:**

- Usefulness depends on specialty
- Better for existing patients
- Good for follow-ups and refills



**Negatives:**

- Not the same as a physical exam
- No substitute for laying hands on a patient
- Impersonal



**27%** Worth Trying



- It's a way to care for patients in today's environment
- It's the way of the future
- Patients will demand it

**20%** Can be Helpful



- Useful for rural areas, elderly patients, busy patients & follow-up visits
- More efficient in some cases
- Complements your practice

**12%** Be Organized



- Have appropriate staffing
- Set patient expectations & prep them beforehand
- Have the right technology & be familiar with it

**27%** Be Careful



- Insurance Reimbursement / Documentation - **13%**
- Diagnosis Errors / Malpractice Issues - **7%**
- Patient's Acceptance - **5%**
- HIPAA Compliance / Data Security - **4%**

\*Does not total to 100%. Some HCP comments fell into multiple categories.