



## Executive Summary

In May 2020, BSM Consulting surveyed ophthalmology clients regarding the re-opening of their practices post-COVID-19. Over 200 practices from around the country responded, including multispecialty and subspecialty practices, providing some valuable insights around progress made to date and specific challenges being encountered.

Recognizing that State and Federal guidelines continue to influence rates of re-opening, the survey reports close to a 50-50 split of practices operating at either less than 50% or greater than 50% of pre-COVID levels. Of the practices in the process of re-opening, almost half of them signal that this is going better than they had anticipated.

Based on survey responses, it is clear that many of the same factors that are going particularly well in some practices are representing challenges to others, including: patient scheduling, clinic flow, and staffing/human resources. On the positive side, significantly more practices report these as going well versus being a key challenge. Patient screening and PPE/safety procedures top the list for things that are working well.

Specialty-specific insights from survey respondents indicate that retina and glaucoma practices are operating at the closest to pre-COVID-19 levels, while cosmetic, refractive, and optical businesses have so far been the slowest to rebound. Approximately half of survey respondents shared that their practices include an ambulatory surgery center (ASC). In these ASCs, survey responses indicate that more than half are already operating at more than 50% of pre-COVID-19 levels.

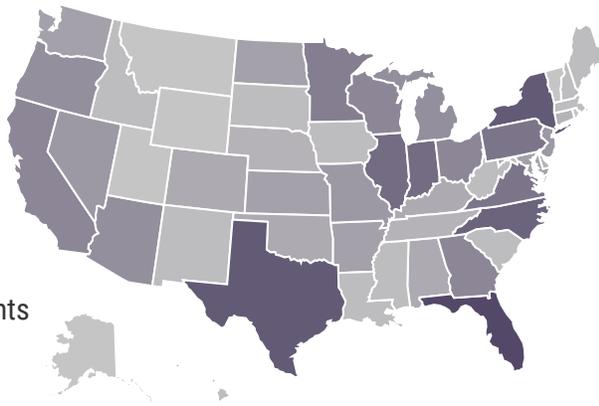
Overall, a very small handful of respondents report their practice has already returned to pre-COVID-19 patient volumes. For the remainder, close to half predict their practice will be back to these norms within 2-6 months. Just over a tenth of all respondents predict a much faster return (within the next month) and a similar number anticipate their practice will take up to a year to rebound completely.

## Responding Practice Location

South: 28.8%  
Midwest: 26.9%  
West: 16.3%  
East: 27.9%

# 208

total survey respondents

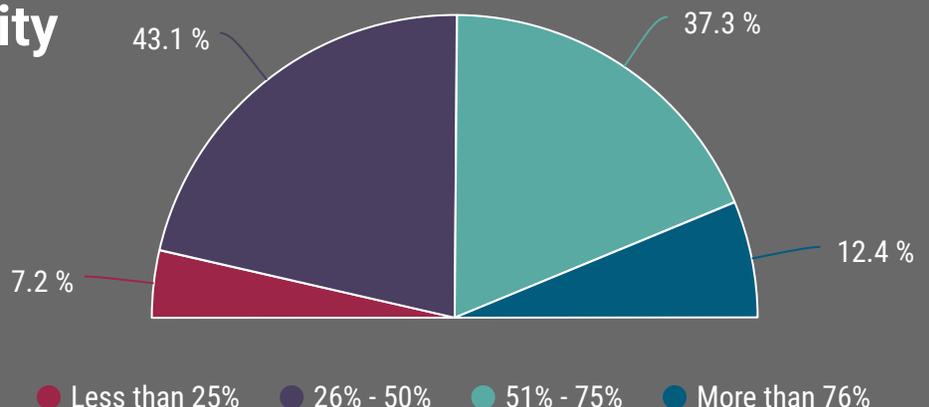


**South:** Alabama, Arkansas, Florida, Georgia, Kansas, Kentucky, Louisiana, Mississippi, Missouri, Oklahoma, South Carolina, Tennessee, Texas  
**Midwest:** Illinois, Indiana, Iowa, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin, Wyoming  
**West:** Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington  
**East:** Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Rhode Island, Vermont, Virginia, West Virginia

States are highlighted from light to dark based on the number of responses per state, with darker states having a higher number of survey respondents.

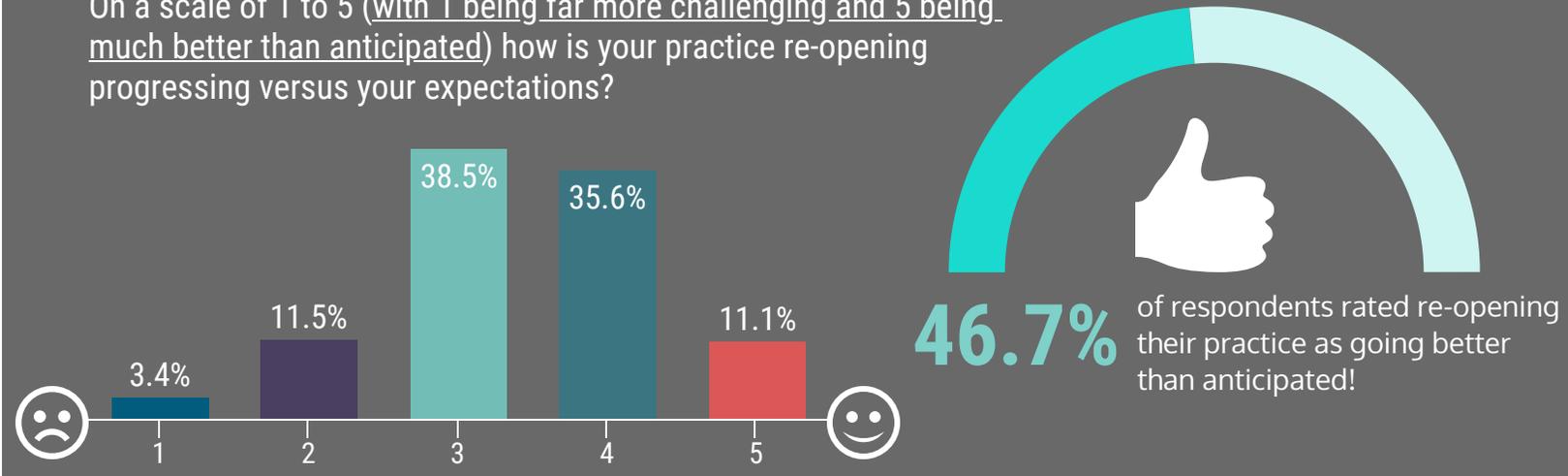
## Current Practice Activity

As of May 18th, how does your current practice activity compare to typical levels prior to COVID-19?



### Practice Re-Opening Expectations

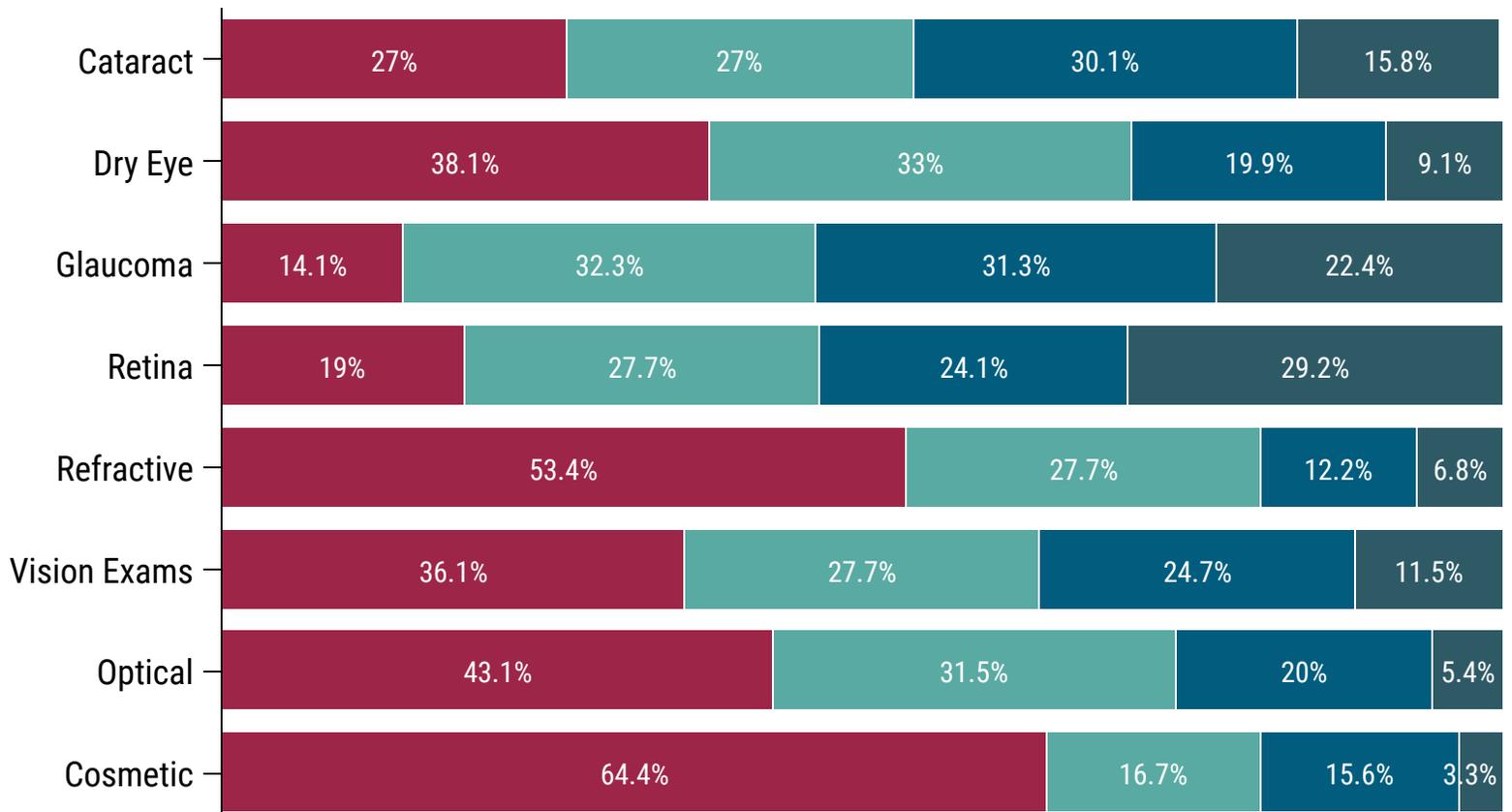
On a scale of 1 to 5 (with 1 being far more challenging and 5 being much better than anticipated) how is your practice re-opening progressing versus your expectations?



### Current Patient Volume vs. Pre-COVID-19 Volume

By specialty, how does your current patient volume compare to typical levels prior to COVID-19?

● Less than 25%   ● 26% - 50%   ● 51% - 75%   ● More than 76%



## Re-Opening Phase

### ✓ What is working well?

1. Patient Screening (179 responses)
2. PPE/Safety Precautions (162 responses)
3. Patient Scheduling (129 responses)
4. Clinic Flow (129 responses)
5. Staffing/Human Resources (100 responses)
6. Telemedicine (59 responses)
7. Other (8 responses)

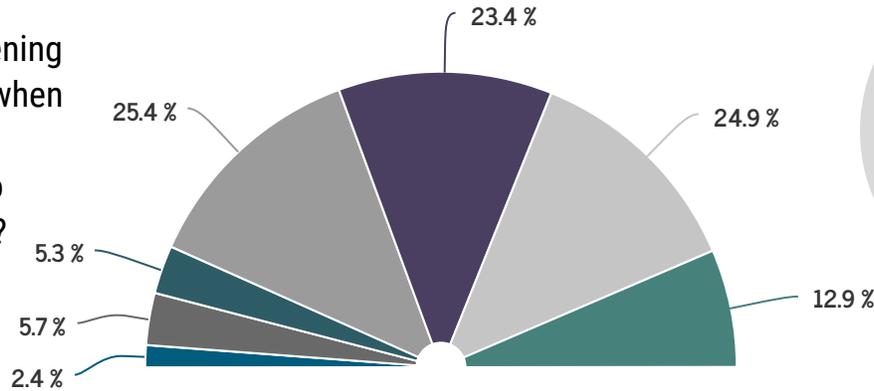
### ✓ What are some of the key challenges?

1. Patient Scheduling (92 responses)
2. Staffing/Human Resources (77 responses)
3. Clinic Flow (68 responses)
4. PPE/Safety Precautions (49 responses)
5. Telemedicine (29 responses)
6. Patient Screening (25 responses)
7. Other (16 responses)

Responses are in descending order from the topic with most participant responses to the fewest number of responses.

## Practice Return to Pre-COVID-19 Norms

Based on your re-opening experience to date, when do you predict your practice will return to pre-COVID-19 norms?

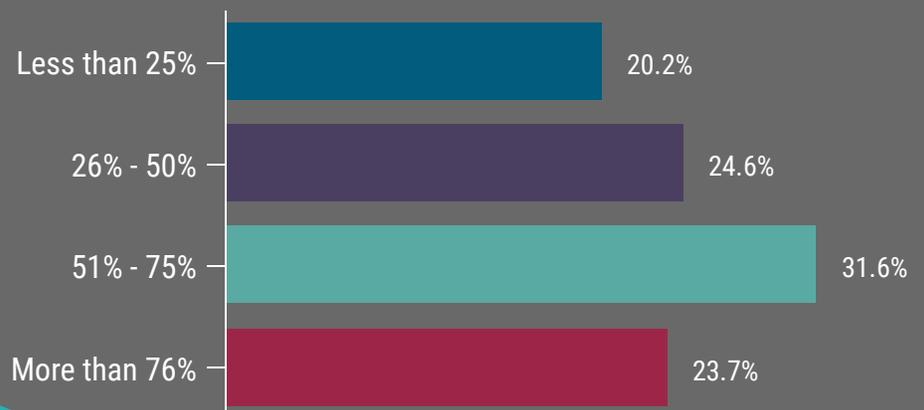


**48.8%**  
of respondents think it will take 2-6 months.

● We are already there ● 1-2 weeks ● 1 month ● 2-4 months ● 4-6 months ● 6-12 months ● 1 year or more

## ASC Return Pre-COVID-19 Norms

If you have an Ambulatory Surgery Center (ASC), as of May 18th how does your current ASC activity compare to typical levels prior to COVID-19?



Of the 114 of ASC survey respondents, **55.3%** of ASCs are above 51% of pre-COVID activity.