

AAO Membership Survey (2007)

- Executive Summary*
- US Members/Fellows*

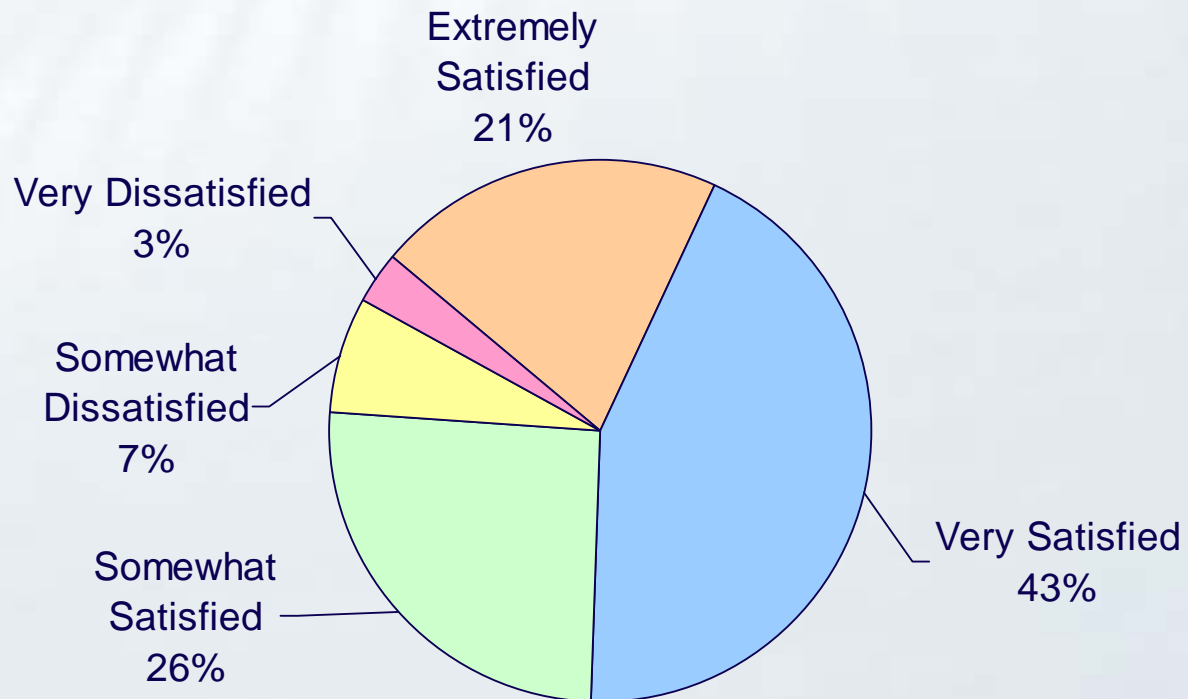
October 2007

AAO

US Members/Fellows

Satisfaction With Current Practice Situation – 2007 - (US Members/Fellows)

- About two-thirds (2/3) of ophthalmologists are at least very satisfied with their current practice situation.

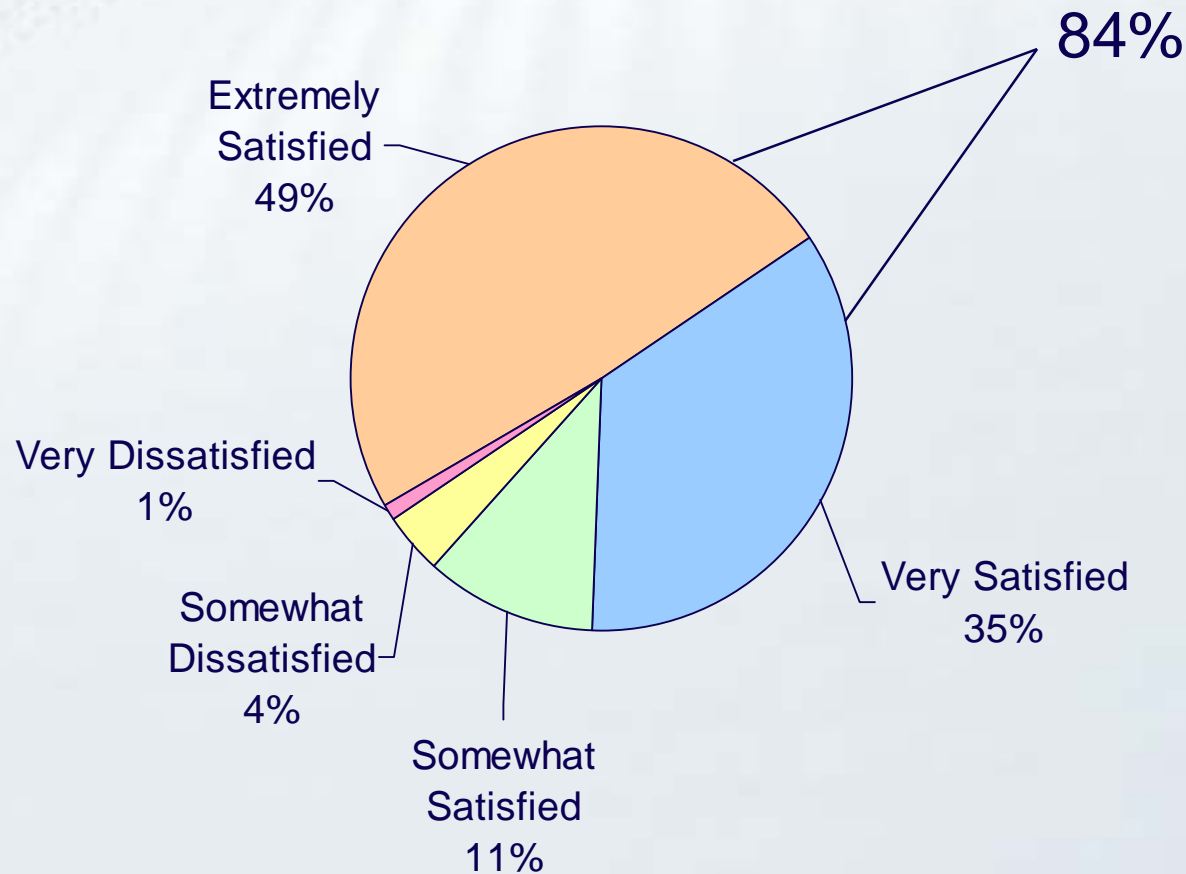


Q.2d - How satisfied are you with your current practice situation?

Base: U.S. Members/Fellows 2007 (925).

Satisfaction With Ophthalmology as a Career Choice – 2007 - (US Members/Fellows)

- The vast majority of ophthalmologists indicate they are extremely/very satisfied with their career choice.

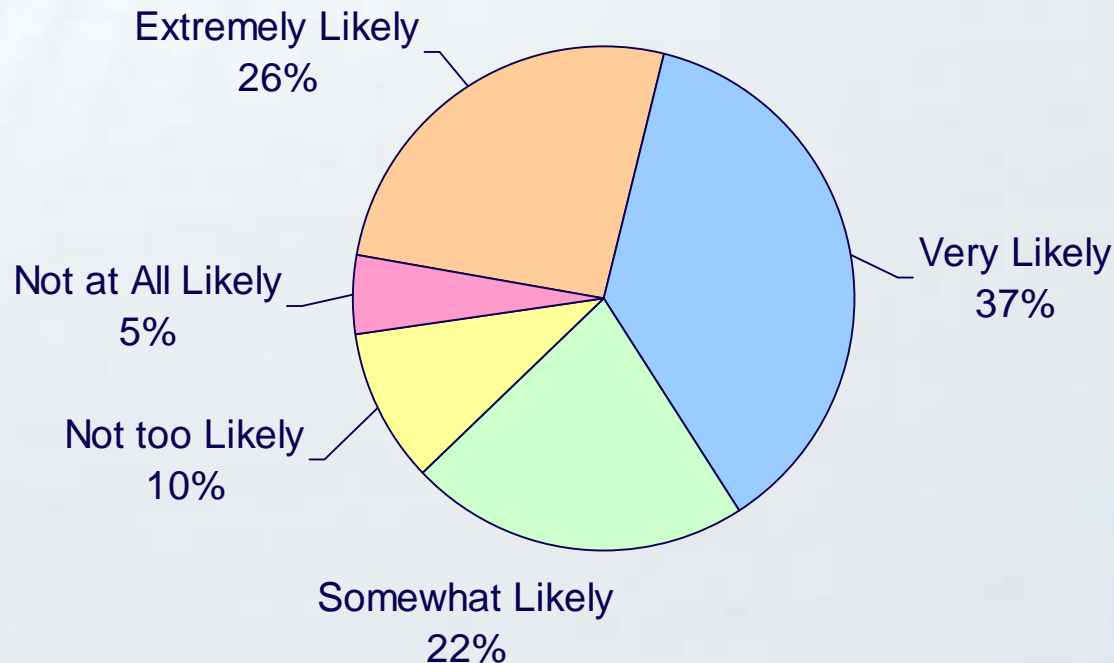


Q.2e - How satisfied are you with ophthalmology as a career choice?

Base: U.S. Members/Fellows 2007 (925).

Likelihood of Recommending a Career in Ophthalmology – 2007 - (US Members/Fellows)

- About two-thirds (2/3) of the members of the Academy said they would be extremely or very likely to recommend a career ophthalmology.

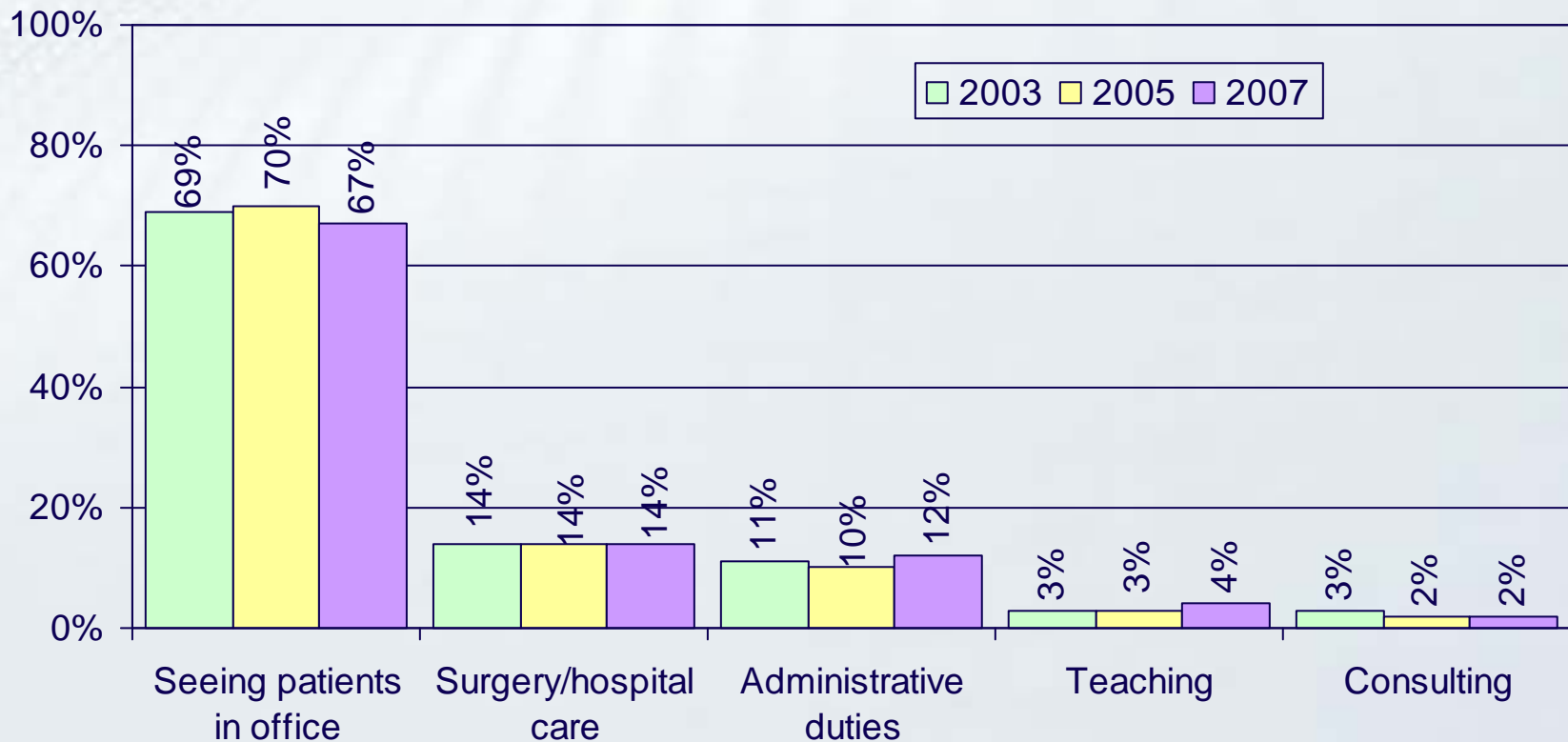


Q.2f - How likely would you be to recommend a career in ophthalmology to a college student who is a relative or close friend?
Base: U.S. Members/Fellows 2007 (925).

Share of Time Spent per Week in Various Activities (US Members/Fellows)

~ (Trend Data 2003-2007)

- About two-thirds of ophthalmologists' time each week is spent specifically seeing patients in their offices. About 10% of ophthalmologists' time is spent on surgery/hospital care and administrative services each week.



Q. 13b - Of the patients you, yourself, see in an average week, about how many are seen for...
About how many hours per week do you spend in the following activities?

Base: U.S. Members/Fellows '03 (911), '05 (854), '07 (925).

Note: No significant differences compared to previous year.

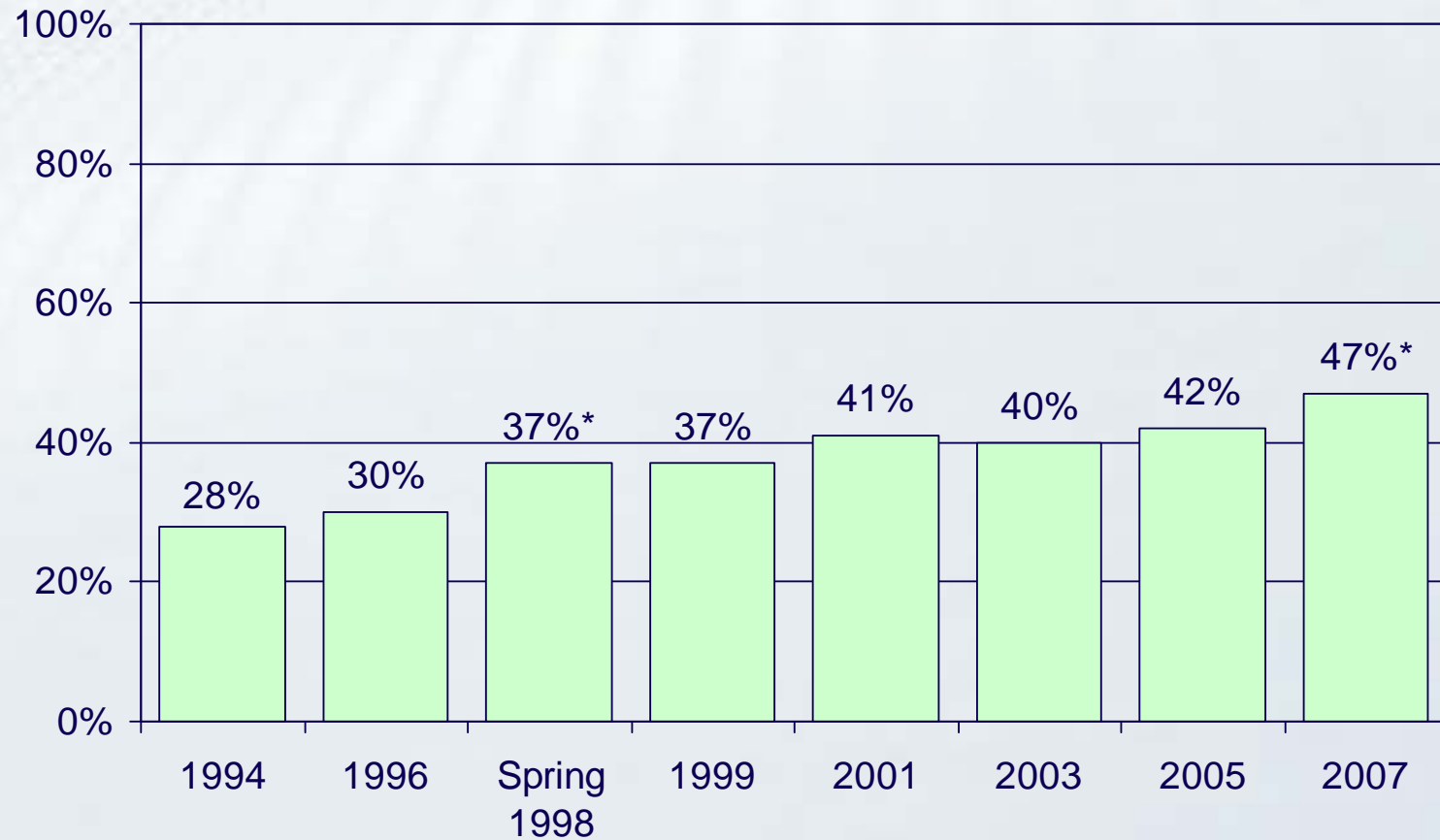
Mean Hours per Week Spent on Specific Activities (US Members/Fellows)

- Ophthalmologists spend over 40 hours each week working.
 - The degree of sub-specialization is inversely correlated to the amount of time ophthalmologists spend seeing patients in their offices.
 - As the percent of time spent in subspecialties increases, fewer hours are spent seeing patients and more hours are spent on surgery/hospital care, administration duties, teaching, and consulting.

	Comprehensive Ophthalmology	<50% in Subspecialty	50% to 90% in Subspecialty	91% or More in Subspecialty
Mean # hours:	#	#	#	#
Seeing patients	31.8	30.1	29.7	28.7
Surgery/hospital	5.4	6.2	6.7	8.1
Administrative	4.6	4.8	6.3	6.7
Teaching	1.0	1.7	3.1	3.4
Consulting	0.8	1.0	1.2	1.3
Total Time Spend per Week	43.6	43.8	47.0	48.2

Employment of Optometrists (US Members/Fellows) ~ (Trend Data 1994-2007)

- About half of AAO members currently employ Optometrists.

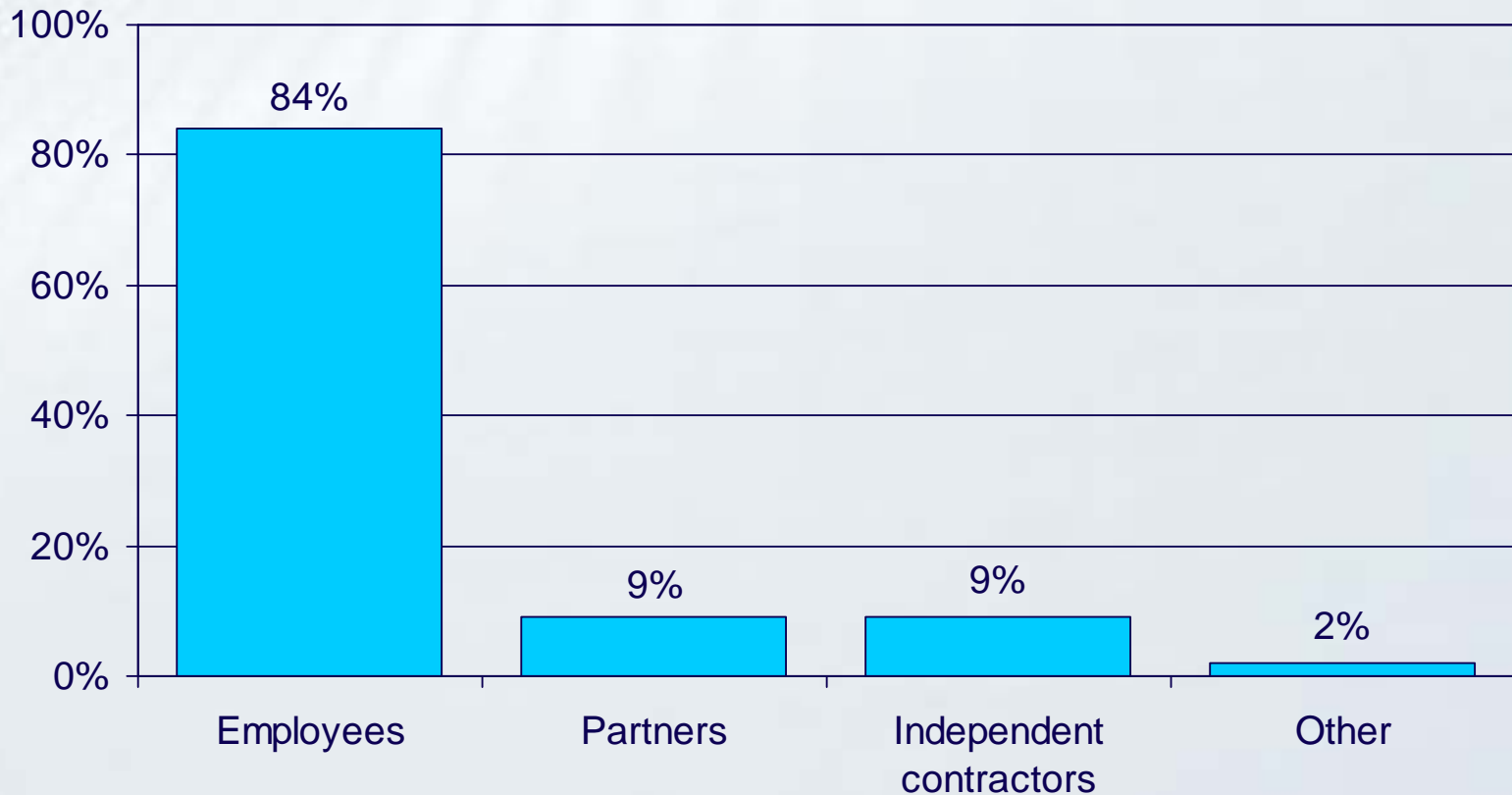


Base: U.S. Members/Fellows: '94 (3567), '96 (394), Spring '98 (356), '99 (747), '01 (732), '03 (911), '05 (854), '07 (925).

* = Significantly different from previous survey at the 95% confidence level.

Role of Optometrists if Employed by Practices – 2007 - (US Members/Fellows)

- When optometrists are present in practices, relatively few are partners or independent contractors.



Q.11c - If there are optometrists in your practice, are they...

Base: Total respondents whose practices have optometrists (431).

Summary of Practices That Have Full-Time Equivalents for Various Positions - (US Members/Fellows) ~ (Trend Data 2001–2007)

- Since 2005, there has been a significant increase in the number of practices that employ coding/billing clerks, non-certified ophthalmic medical personnel, JCAHPO – Certified Ophthalmic Medical Personnel, and optometrists.

	2001	2003	2005	2007
Base: U.S. Members/Fellows	(732)	(911)	(854)	(925)
	%	%	%	%
Ophthalmologists	100	100	100	100
Receptionists/Secretaries	90	92	94	96
Coding/Billing Clerks	70	75*	76	81*
Practice Administrators/Office Managers	68	75*	78	80
JCAHPO-Certified Ophthalmic Medical Personnel	65	65	66	71*
Non-Certified Ophthalmic Medical Personnel	63	68*	68	77*
Opticians	51	53	52	51
Optometrists	41	40	42	47*
Nurses	31	30	28	32
Physician Assistants	NA	NA	9	7

Q.11a - How many full-time equivalents does your whole practice have for each of the listed positions?

* = Significant difference from previous survey at the 95% confidence level.

Note: Wording changed to "full-time equivalents" in 2005.

- On average, ophthalmologists have 32.7 full-time equivalent staff members per practice in 2007. This averages to 4.8 staff members supporting each full-time equivalent ophthalmologist.
 - Practices with two full-time ophthalmologists have the most support staff (6.7 employees) per doctor.
 - Practices with six or more full-time equivalent ophthalmologists have the fewest support staff (4.4 employees) per doctor.

Summary of Full-Time Equivalents by Practice Size for Various Positions – 2007 - (US Members/Fellows)

	Total	# Ophthalmologists in Practice					
		1	2	3	4	5	6+
Base: U.S. Members/Fellows Who Responded	(925)	(308)	(147)	(101)	(87)	(35)*	(247)
Ophthalmologists	100%	100%	100%	100%	100%	100%	100%
Mean #	5.6	1.0	2.0	3.0	3.9	4.9	15.3
Receptionists/Secretaries	96%	90%	99%	97%	100%	100%	99%
Mean #	6.8	1.5	3.5	4.1	6.2	6.5	16.7
Coding/Billing Clerks	81%	62%	86%	89%	92%	94%	91%
Mean #	3.0	0.8	1.5	2.3	2.8	3.1	7.1
Practice Administrators/Office Managers	80%	54%	84%	93%	92%	94%	99%
Mean #	1.8	0.6	1.0	1.4	1.4	1.8	3.9
Non-Certified Ophthalmic Medical Personnel	77%	63%	85%	84%	85%	83%	84%
Mean #	4.4	1.1	2.4	3.4	4.1	5.8	9.9

Q.11a - How many full-time equivalents does your whole practice have for each of the listed positions?

* = Small base size.

Summary of Full-Time Equivalents by Practice Size For Various Positions – 2007 (US Members/Fellows) ~ (continued)

	Total	# Ophthalmologists in Practice					
		1	2	3	4	5	6+
Base: U.S. Members/Fellows Who Responded	(925)	(308)	(147)	(101)	(87)	(35)	(247)
JCAHPO-Certified Ophthalmic Medical Personnel	77%	41%	74%	80%	89%	77%	94%
Mean #	6.0	0.8	2.3	3.4	5.5	6.1	15.8
Opticians	51%	33%	55%	51%	53%	49%	72%
Mean #	1.8	0.5	1.3	1.4	1.7	1.8	4.0
Optometrists	47%	17%	49%	46%	54%	54%	79%
Mean #	1.7	0.2	0.8	0.8	1.4	1.6	4.8
Nurses	32%	13%	23%	25%	45%	37%	59%
Mean #	1.3	0.2	0.4	0.5	1.0	0.7	3.7
Physician Assistants	7%	3%	6%	5%	3%	3%	16%
Mean #	0.4	0.1	0.1	0.1	0.1	0.1	1.3
Total Employees							
Mean #	32.7	6.6	15.3	20.3	28.0	32.3	82.3
Support Staff per Full-Time Equivalent Ophthalmologist	4.8	5.6	6.7	5.8	6.2	5.6	4.4

Q.11a - How many full-time equivalents does your whole practice have for each of the listed positions?

* = Small base size.

Wait Time for Routine Appointments, Non-Urgent Eye Problem Appointments and Surgery – (2005 – 2007) - (US Members/Fellows)

- Both new and established patients' routine appointments continue to be scheduled about 2 weeks from the date of request. Appointments made to address specific problems are scheduled about 4 days sooner than routine visits.
- Non-urgent surgery is scheduled 20 days in advance, on average.

	Established Patients		New Patients	
	2005	2007	2005	2007
Average amount of wait time for routine appointments (days)	13.8	13.2	13.8	13.8
Average amount of wait time for eye problem appt. (days)	6.7	9.3	7.1	9.8

	Surgical Patients	
	2005	2007
Average wait time for non-urgent surgery (days)	18.6	20.2

- Q.15a - About how much time elapses from when a patient calls for a routine appointment to when he/she is seen in your (whole) practice? (Please answer for both established patients and new patients.)
- Q. 15b - About how much time elapses from when a patient calls with a non-emergency eye problem/condition to when he/she is seen in your (whole) practice? (Again, please answer for both established and new patients.)
- Q. 16 - Regarding surgical patients, about how much time elapses from when non-urgent surgery has been determined necessary (by you or a colleague) to when surgery is actually scheduled?



EMR System Plans for The Next Year – 2007 (US Members/Fellows)

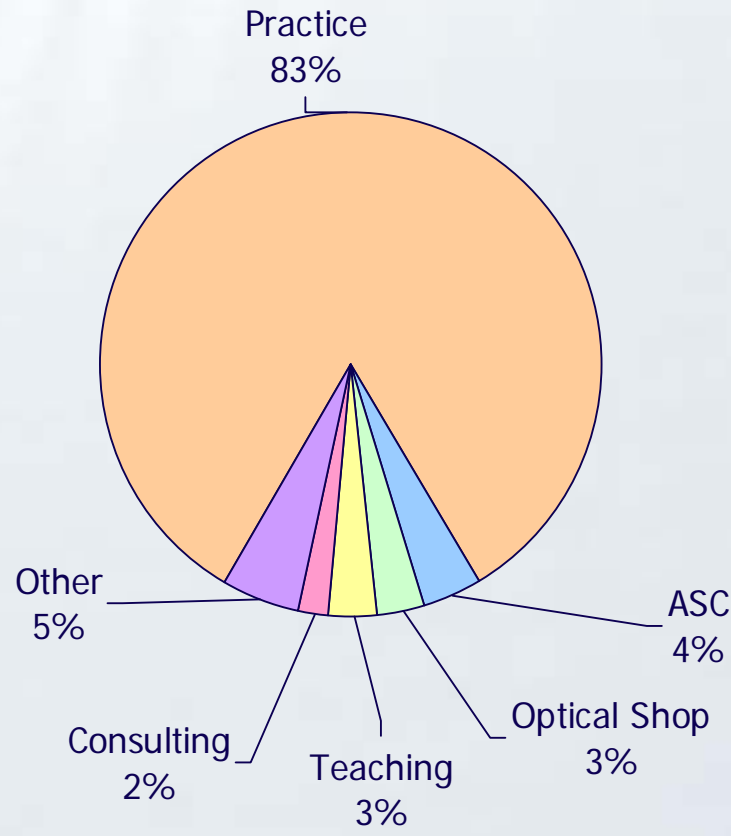
- About three-quarters of ophthalmologists do not have an EMR system. Over one-quarter (1/4) of members plan to either enhance or replace an existing system or purchase a new system in the coming year.

	2007
Base: U.S. Members/Fellows	(925)
	%
Have EMR System	24
No enhancements planned	15
Plan to enhance/replace	9
Do Not Have EMR System	73
Plan to purchase	11
Will begin shopping but will not purchase within year	19
No plans to shop/purchase	43
Plan to enhance/replace/purchase EMR (Net)	27

Q.28 - Which of the following describes your Electronic Medical Record (EMR) system plans for the next year?

Sources Accounting for Members' Personal Income – 2007 - (US Members/Fellows)

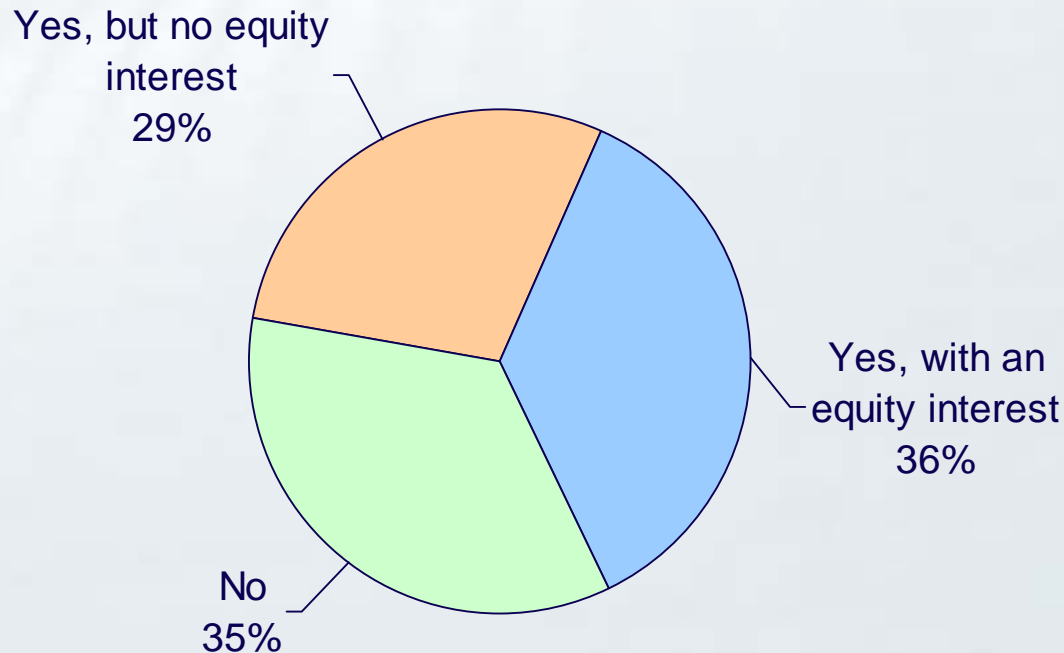
- On average, practice revenues make up the vast majority of personal income.



Q.6 - Please indicate what percentage of your personal income comes from the following sources.
Base: U.S. Members/Fellows (925).

Whether Practice Uses an Ambulatory Surgical Center (ASC) – 2007 - (US Members/Fellows)

- About two-thirds (2/3) of ophthalmologists use an ambulatory surgical center. Almost four in ten ophthalmologists have an equity interest in their surgical center.

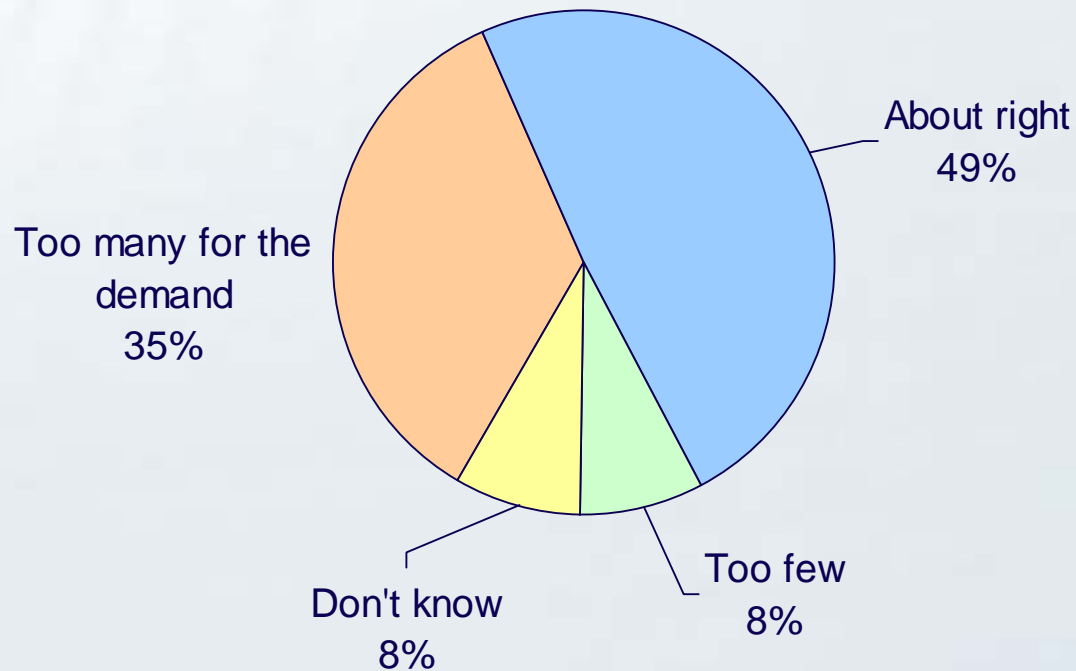


Q.17b - Does your practice use an Ambulatory Surgical Center (ASC)?

Base: U. S. Members/Fellows 2007 (925).

Assessment of Supply/Demand for Ophthalmologists – 2007- (US Members/Fellows)

- About half of ophthalmologists think that the supply/demand for ophthalmologists is just about right, considering the number currently practicing.
- About one-third (1/3) of ophthalmologists think there are too many practicing considering the demand/supply.

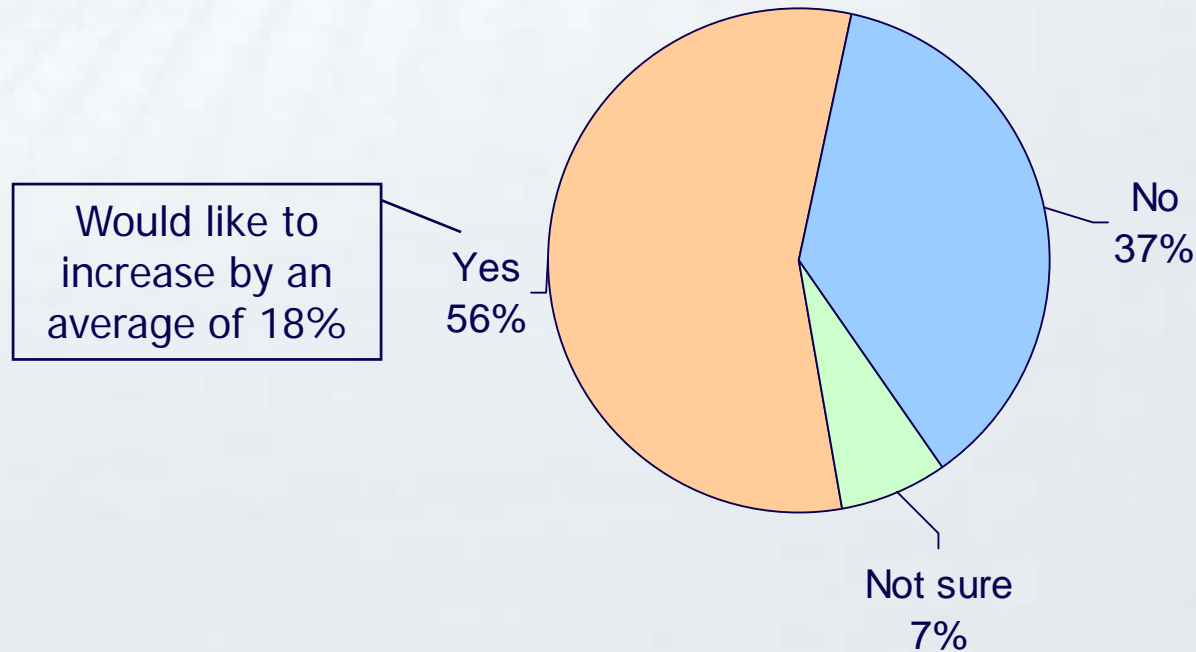


Q.18 - How would you assess the supply and demand for ophthalmologists in your geographic area?

Base: U.S. Members/Fellows 2007 (925).

Whether Members Would Like to Increase Their Patient Load - 2007 - (US Members/Fellows)

- A majority of ophthalmologists are interested in increasing their patient load. Less than four in ten are not interested in seeing more patients, most likely representing the more established AAO members/fellows.



Q.19a - Would you like to increase your personal patient load, if you could? As you consider this question, please assume that you would be supported by adequate staff and compensated proportionally. (If yes) By what percentage would you increase your patient load?

Base: U. S. Members/Fellows 2007 (925).