

COVID-19 SURGICAL VOLUME IMPACT SURVEY

TOPLINE SUMMARY OF RESULTS

BACKGROUND AND PURPOSE

IN AN EFFORT TO UNDERSTAND HOW THE EMERGENCE OF COVID-19 HAS IMPACTED ORTHOPAEDIC SURGEONS, AAOS HAS CONDUCTED SEVERAL DIFFERENT SURVEYS.

With the COVID-19 Surgical Volume Impact Survey, the Academy explored how the emergence of COVID-19 has impacted the overall musculoskeletal health system.

Results will be used by the AAOS to support our members as they return to elective surgery and increase procedure volumes as safely and quickly as possible.

METHODOLOGY



A large-scale, online survey administered by the AAOS Market Research Team



U.S.-based members (all 50 states and District of Columbia)



Respondents in AAOS member categories of Candidate, Fellow, Emeritus and those in postgraduate Fellowship



May 11 survey launch with reminders on May 18 and May 22



1,523 completed surveys at close on May 26



Overall response rate of 6% (1,523 / 25,279 delivered)

RESPONDENT PROFILE

RESPONDENTS BY SPECIALTY



RESUMPTION OF ELECTIVE SURGERY

55%

OF SURGEONS BELIEVED SURGERY WOULD RESUME BY MID-MAY AND NEARLY ALL BY MID-JUNE

KEYS TO DETERMINING WHEN ELECTIVE PROCEDURES RESUME

44%

EXISTING COVID-19 INFECTION RATES

41%

ABILITY TO PRE-OPERATIVELY TEST EVERY PATIENT FOR COVID-19

HOW SURGEONS EXPECT FACILITIES TO RAMP UP



SOMEWHAT CAUTIOUS APPROACH AND STEADY BUILDUP



FACTORS DRIVING RATE OF RAMP UP

40% Patient motivation
38% Pre-operative testing

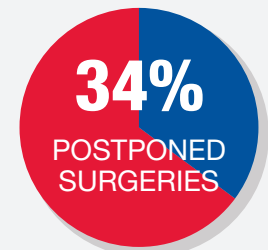


FIRST PROCEDURES TO RAMP UP

57% Sports
50% Knee
47% Hand & Wrist

PATIENT POSTPONEMENT OF SURGERY

On average a third (34%) of patients have postponed surgeries by more than **3 months**



SURGEON'S VIEW OF PATIENT SENTIMENT ON COVID-19

HOSPITALS "UNCLEAN OR NOT SAFE"

83%

Somewhat Agree 47%
Strongly Agree 36%

SECOND WAVE FEARS

74%

Somewhat Agree 54%
Strongly Agree 20%

DESIRE TO ALLEVIATE PAIN SUPERSEDES FEAR

73%

Somewhat Agree 52%
Strongly Agree 21%

FACILITIES BACK TO PRE-COVID-19 LEVELS

Surgeons feel their facility will be back to pre-COVID-19 levels of surgery in about 11 weeks



AFTER RESUMPTION, NUMBER OF MONTHS TO REGAIN 90% OF PRE-COVID SURGICAL VOLUME

5 MONTHS

70%

4 MONTHS

58%

3 MONTHS

42%

2 MONTHS

19%

1 MONTH

7%

IMPACT ON INTERACTION WITH INDUSTRY SALES REPS

HALF EXPECT NO IMPACT

49%

A QUARTER WANT ANTIBODY TESTING FOR REPS

27%

A QUARTER RECOMMEND REPS BRING THEIR OWN PPE

27%