

Optics at a Glance 2009

Optics at a Glance has been the key source of information about optometry, opticians, the UK optical market and services for nearly 30 years. This survey of Federation of Ophthalmic & Dispensing Opticians (FODO) members, who together account for over two thirds of the UK optical market, provides information on volumes, prices and trends in sight tests undertaken by FODO members between 1 April 2008 and 31 March 2009. In future *Optics at a Glance* will be an Optical Confederation publication.

AN OVERVIEW

- Registered opticians offer NHS and private patients high standards of care.
- 68% of adults aged 16 and over wear spectacles or contact lenses (Men: 65% Women: 71%).¹
- After a sight test, patients are issued with a prescription, a statement saying that a prescription is not required, or are informed that their prescription has not changed.
- Patients can have spectacles or contact lenses dispensed in accordance with their prescription wherever they choose.
- NHS vouchers are available to a number of qualifying groups to help with the cost of spectacles or contact lenses. They vary in value according to the power of the lenses prescribed.

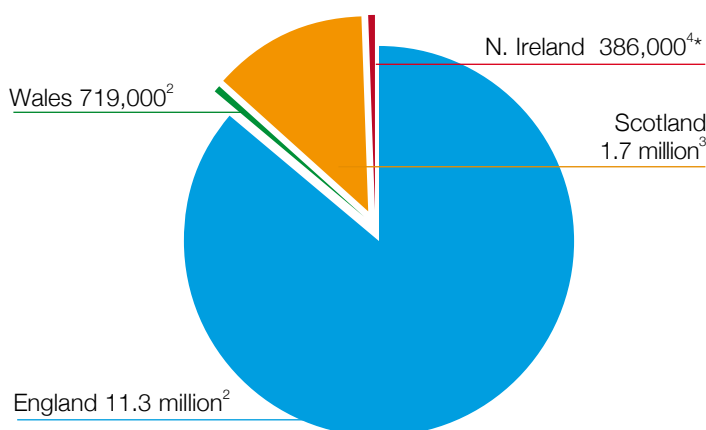
OPTICIANS' PREMISES

In 2007 there were approximately 7,250 opticians' premises in the UK (N.B. 2008-09 data unavailable).

- Optical practices are equipped to carry out full eye examinations, to test sight, identify eye conditions (including long-term and preventable pathologies), to deal with minor optical emergencies and to co-manage patients' eye care with local eye hospitals, GPs and ophthalmologists.
- The cost of providing premises, consulting rooms, equipment and staff is borne by the optical practice without subsidy from the NHS.

VOLUME OF SIGHT TESTS (UK)

NHS Sight Tests Year to 31 March 2009



In the year to 31 March 2009, a total of 19.9 million sight tests were carried out in the UK (England: 16.5 million, of which 5.2 million private; Wales: 1 million, of which 300,000 private; Scotland: 1.7million NHS tests, of which 155,000 private; N. Ireland: 559,000, of which 173,000 private).^{2,3,4} 14.1 million of these were NHS sight tests (70.7%) and 5.8 million were sight tests conducted privately** (29.3%)^{2,3,4}. NHS demand* rose by an average of 2.1% in England, 2.6% in Wales and 6.2% in Scotland.

*Data for Northern Ireland is for 2007-08. Data for 2008-09 unavailable.

**All private sight test figures are approximate. Figures are based on Department of Health extrapolations from the *Sight Tests Volume and Workforce Survey: Great Britain: 2005-06*, Department of Health

SIGHT TESTS IN MILLIONS (UK / GB)

Year	Private**	NHS
08-09 (UK)*	5.8	14.1
07-08 (UK)	5.7	13.8
06-07 (UK:GB + N.Ireland)	5.4	13.1
05-06 (GB)	5.5	12.0
04-05 (GB)	6.0	11.7
03-04 (GB)	5.8	11.4

*Data for Northern Ireland is for 2007-08. Data for 2008-09 unavailable.

**All private sight test figures are approximate

SIGHT TEST FEES

In Scotland, free NHS eye examinations are available to all. However, in England, Wales and Northern Ireland eligibility is restricted to certain categories (see NHS eligibility overleaf). The fee paid to an optical contractor for carrying out an NHS sight test by the governments of England, Wales, and Northern Ireland is £20.70 (1 April 2010 – 31 March 2011; 2008-09 figure £19.80). However, in Scotland the NHS primary eye examination fee is £37 for adults under 60, £45 for adults over 60, and the NHS supplementary eye examination fee is £21.50.

In this survey of FODO members the average charge to patients for a private sight test, excluding discounts and special offers, was £23.05 (from within a range of £10 – £50). The average is less than half the actual cost of providing a sight test. This reflects the market reality of spectacle sales significantly subsidising the cost of both private and NHS sight tests, except in Scotland.

ANALYSIS OF FODO SAMPLE

changed or new prescription	69%
contact lenses	6%
referral to GP or hospital	4%
no prescription change or no correction required	25%

Referrals to GPs or hospitals have remained at 4% in line with trends. Additionally, optometrists now routinely monitor a range of conditions rather than automatically referring patients to their GP or hospital.

The average interval between sight tests rose to 26 months (from 25 months in 2007-08), with an estimated average interval for working age adults remaining at 29 months.

SPECTACLES DISPENSED

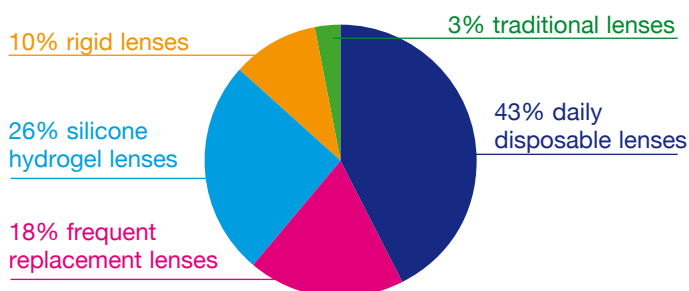
In the FODO survey, the proportion of re-glazed spectacles, when new lenses are put into old frames, remained at 6%. This reflects the continuing competitiveness of the price of new spectacles.

34% of all spectacle dispensings recorded by the FODO survey were paid for in full or in part with an NHS voucher.

100% of practices in our survey stocked spectacles for children and adults within voucher values (which range from £36.20 to £200.10). Many patients exercise their right to use a voucher as part payment towards more high value options.

CONTACT LENSES

In the FODO survey an average of 6% of sight tests resulted in patients choosing contact lenses (a marginal fall). According to the Association of Contact Lens Manufacturers, wearers in 2009 numbered 3.3 million – 6.8% of the adult population. Of these 42.6% wear daily disposable lenses, more than any other type of lens. About 18.5% of wearers wear frequent replacement lenses, 25.6% wear silicone hydrogel lenses, 10.2% wear rigid contact lenses and 3% wear soft traditional contact lenses.⁵

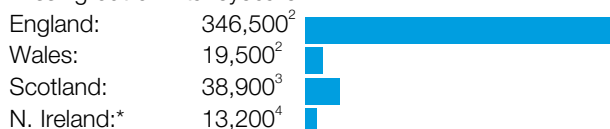


DOMICILIARY EYECARE

Patients who are eligible for a NHS sight test, but who are unable to leave their own home or residential home unaccompanied because of physical or mental illness or disability, are entitled to a free NHS eyecare service at home. The profession is committed to ensuring that all patients access the same high standards of care, irrespective of their age, disability, or mobility.

In England, during 2008-09, 1.54 million adults received care services in their own home provided by Councils following a community care assessment. A further 229,900 adults were living in residential or nursing care homes.⁶ The majority of these would be eligible for a free NHS domiciliary sight test.

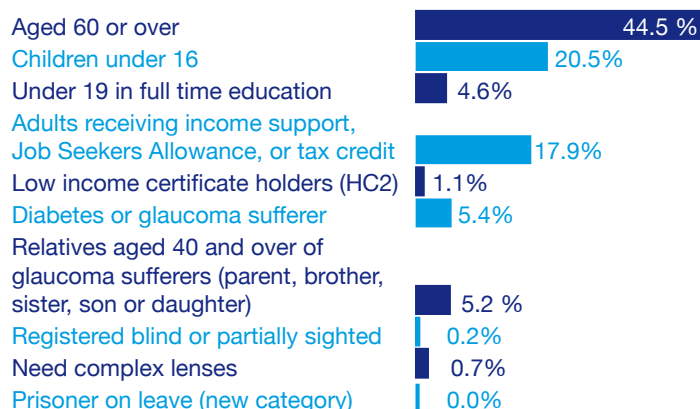
In the UK in 2008-09 a total of 418,100 domiciliary sight tests were carried out, suggesting that many vulnerable people are still missing out on vital eyecare.



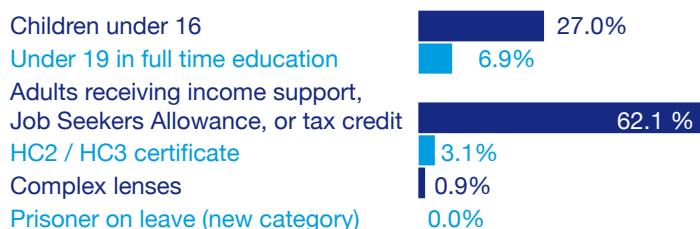
*Data for Northern Ireland is for 2007-08. Data for 2008-09 unavailable.

NHS ELIGIBILITY

NHS Sight Tests (England) 08-09²



VOUCHERS (England) 08-09²



INVESTMENT IN EDUCATION

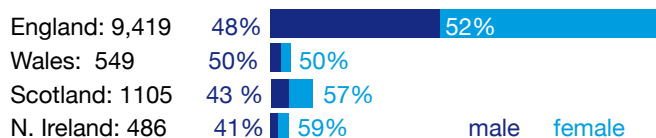
High quality education and training is central to the high quality services opticians provide. In 2008-09, 76% of pre-registration training places for optometrists were provided by the major optical businesses.⁷ Continuing Education and Training (CET) became a legal requirement for practitioners in July 2005. The Department of Health provides a grant towards loss of earnings in respect of optometrists and OMPs undertaking CET, set at £468 for 2009-10.

REGISTERED PRACTITIONERS

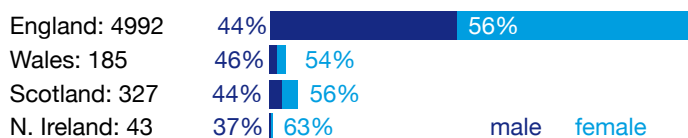
Comprehensive professional services are only available from registered opticians.

Optometrists (Ophthalmic Opticians) test sight and prescribe and dispense spectacles and contact lenses. They are university trained to recognise diseases and abnormalities in the eye. Optometrists are regulated by the General Optical Council (N.B. some optometrists practising in Northern Ireland are registered with the Opticians Board in the Republic of Ireland).

According to the General Optical Council, the regulatory body that oversees optometrists, there were a total of 11,559 registered optometrists in the UK at the end of 2008⁸ (rising from 11,094 in 2007).



Dispensing Opticians dispense, fit and supply spectacles and with additional certification also fit contact lenses. Dispensing opticians interpret a patient's visual and fitting requirements and translate the prescription into specifications and instructions for the optical manufacturer. Dispensing opticians are regulated by the General Optical Council. There were 5,547 dispensing opticians in the UK registered with the General Optical Council at the end of 2008⁸ (rising from 5,309 in 2007).



Ophthalmic Medical Practitioners (OMPs) are doctors who specialise in eye care. There were approximately 396 OMPs in the UK in 2008^{2,3,4} (England 341, Wales 23, Scotland 10, N.Ireland* 22) who conducted less than 1% of sight tests (England 0.9%, Wales 0.3%, Scotland 0.2%, N.Ireland 0.2%).* OMPs are regulated by the General Medical Council.

*Data for Northern Ireland is for 2007-08. Data for 2008-09 unavailable.

SOURCES

- 1 Health Survey for England, 2001
- 2 General Ophthalmic Services: Activity Statistics for England and Wales, year ending 31 March 2009, The Information Centre, 2009
- 3 NHS Scotland (ISD Scotland Report General Ophthalmic Services, 28 July 2009)
- 4 Central Services Agency, Northern Ireland
- 5 Association of Contact Lens Manufacturers (ACLM) Market report 2009: technical summary
- 6 Community Care Statistics, 2008-09: Social Services Activity Report, England, The Information Centre, 2010
- 7 College of Optometrists
- 8 General Optical Council Annual Report 2008-09

Federation of Ophthalmic & Dispensing Opticians
199 Gloucester Terrace, London W2 6LD
Tel: 020 7298 5153 Email: info@fodo.com
www.fodo.com