

Optics at a Glance has been the key source of information about optometry, opticians, the UK optical market and services for 30 years. This year it includes data on sight tests and spectacles provided by members of the Federation of Ophthalmic & Dispensing Opticians (FODO) and data on contact lenses provided by members of the Association of Contact Lens Manufacturers (ACLM).

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 or 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 of patients to help with the cost of spectacles or contact lenses. They vary in value according to the power of the lenses prescribed.

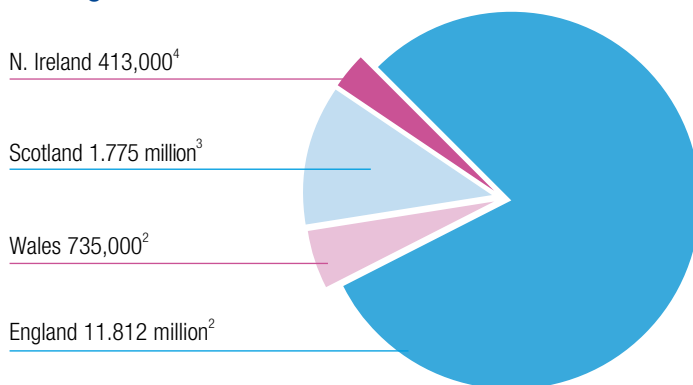
OPTICIANS' PREMISES

In 2007 there were approximately 7,250 opticians' premises in the UK (N.B. 2008 – 2010 data unavailable).

- Optical practices are equipped to carry out full eye examinations to test sight and identify eye conditions (including long-term and preventable pathologies) and to deal with minor optical emergencies.
- They are also able to monitor and/or co-manage patients who have long term eye diseases with GPs or hospital ophthalmologists.
- The cost of providing premises, consulting rooms, equipment and staff is borne by the practice.

VOLUME OF SIGHT TESTS (UK)

NHS sight tests Year to 31 March 2010



In the year to 31 March 2010, a total of 20.8 million sight tests were carried out in the UK (England: 17.2 million, of which 5.4 million private*; Wales: 1.1 million, of which 336,000 private; Scotland: 1.9 million, of which approximately 155,000 private; N. Ireland: 586,000, of which 173,000 private)^{2, 3, 4} 14.7 million of these were NHS sight tests (70.8%) and 6.1 million were sight tests conducted privately (29.2%)^{2, 3, 4}. NHS demand rose by an average of 4.7% in England, 2.2% in Wales, 7% in N. Ireland (from 2008) and 2.7% in Scotland.

| | |
|-----------------|---------------------|
| Total | 20.8 million |
| NHS | 14.7 million |
| Private* | 6.1 million |

*All private sight test figures are approximate. Figures for England and Wales are based on Department of Health extrapolations from the *Sight Tests Volume and Workforce Survey: Great Britain: 2005-06*, Department of Health. Figures for Scotland are based on an estimate from FODO Scotland. Figures for Ireland are from 2007.

SIGHT TESTS IN MILLIONS (UK / GB)

| Year | Private* | NHS |
|---------------------------|----------|------|
| 09-10 (UK) | 6.1 | 14.7 |
| 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 |

*All private sight test figures are approximate.

NHS 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 remains at £20.70 for the year 1 April 2011 to 31 March 2012 – the same as for 2010-11⁵ (2008-09: £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.

SIGHT TESTS AND DISPENSING

FODO data for April 2009 – March 2010

Private sight test fees

In this survey of FODO members the average charge to patients for a private sight test, excluding 'no-charge', discounts and special offers, was £21.30 (from within a range of £15 – £50). The average is less than half the actual cost of providing a sight test. This reflects the market reality of spectacle sales subsidising the cost of both private and NHS sight tests, except in Scotland.

Result of sight test

| | |
|-----------------------------|-----|
| changed or new prescription | 63% |
| contact lenses | 6% |
| referral to GP or hospital | 5% |

- Referrals to GPs or hospitals have increased from 4% to 5%. Possible factors might include the ageing population and the NICE guidelines on glaucoma referral.

Sight test intervals

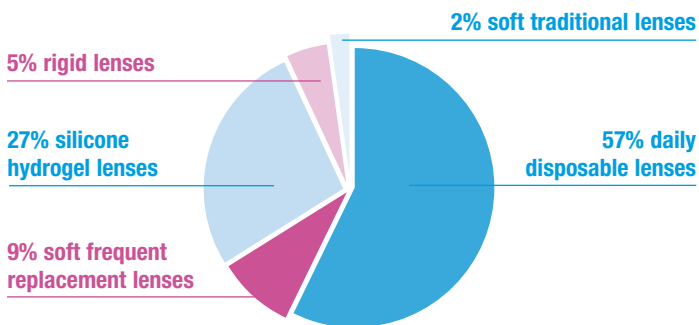
- The average interval between sight tests remained the same at 26 months, with an estimated average interval for working age adults remaining at 29 months.

Spectacles dispensed

- In the 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.
- 92% of practices stocked spectacles for children, and 84% for adults, within NHS voucher values (which range from £36.20 to £200.10). N.B. Many patients exercise their right to use a voucher as part payment towards more high value options.

CONTACT LENSES

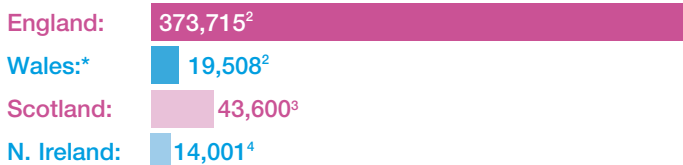
ACLM statistics 2010 – type of lens wear



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 2010 numbered 3.6 million – 7.2% of the adult population.⁶

DOMICILIARY EYECARE

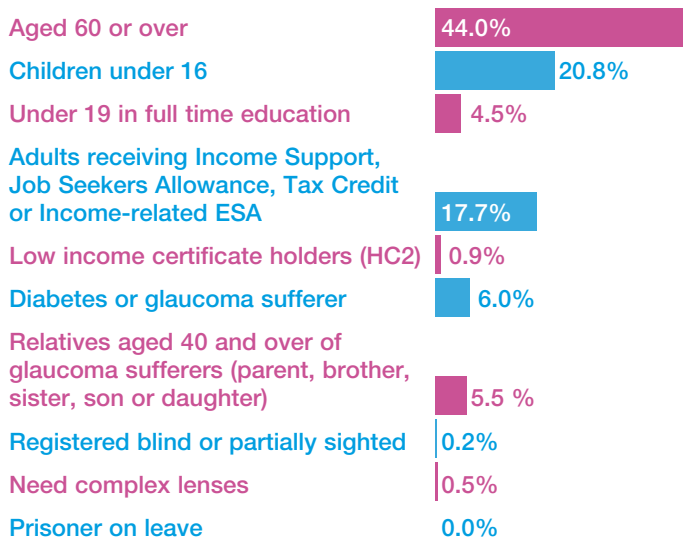
- Patients who are eligible for a NHS sight test, but who are unable to leave their own home or residential home unaccompanied because of physical or mental illness or disability, are entitled to a free NHS eyecare service at home. The profession is committed to ensuring that all patients access the same high standards of care, irrespective of their age or mobility.
- In England, during 2009-10, 1.46 million adults received care services in their own home provided by Councils following a community care assessment. A further 225,600 adults were living in residential or nursing care homes – a decrease of 2% from 2008-09.⁷ The majority of these would be eligible for a free NHS domiciliary sight test.
- In the UK in 2009-10 a total of 450,824 domiciliary sight tests were carried out, suggesting that many vulnerable people are still missing out on vital care.



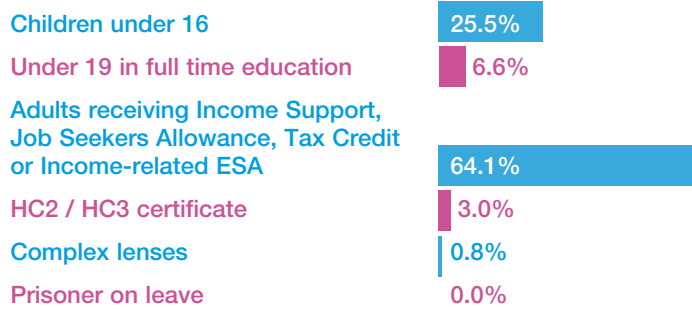
*Data for Wales is for 2008-09. Data for 2009-10 unavailable.

NHS ELIGIBILITY

NHS sight tests (England) 2009-10² (split by eligibility category)



VOUCHERS (England) 2009-10² (split by eligibility category)



England: 4.4 million NHS vouchers processed in 2009-10.

INVESTMENT IN EDUCATION

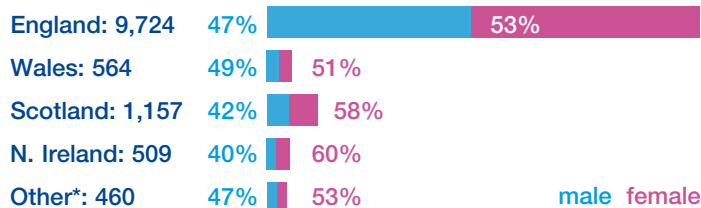
High quality education and training is central to the high quality services opticians provide. In 2009-10, 84% of pre-registration training places for optometrists were provided by the major optical businesses.⁸ Continuing Education and Training (CET) became a legal requirement for practitioners in July 2005. The Department of Health provides a grant towards loss of earnings in respect of optometrists and OMPs undertaking CET, set at £491 for 2010-11⁵.

REGISTERED PRACTITIONERS

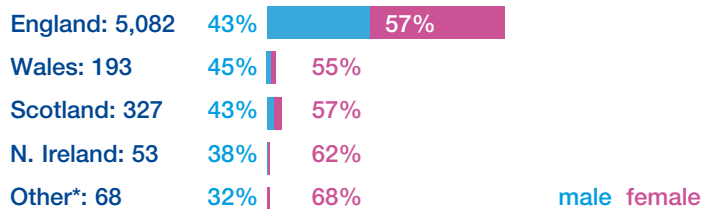
Comprehensive professional services are only available from registered opticians.

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 (GOC). N.B. some optometrists practising in Northern Ireland are registered with the Opticians Board in the Republic of Ireland.

According to the GOC there were a total of 12,414 registered optometrists in the UK at the end of 2009 (rising from 11,559 in 2008)⁹



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 GOC. There were 5,723 dispensing opticians in the UK registered with the GOC at the end of 2009⁹ (rising from 5,549 in 2008).



Ophthalmic Medical Practitioners (OMPs) are doctors who specialise in eye care. There were approximately 403 OMPs in the UK at 31 December 2010 (England 330¹⁰; Wales 16¹⁰, Scotland 41¹¹, N.Ireland 16⁴) who conducted 1.2% of sight tests [England 0.4%, Wales 0.3%, Scotland 0.1%, N.Ireland 0.4%]. OMPs are regulated by the General Medical Council.

*Example: practitioner working overseas.

Sources

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- General Ophthalmic Services: Activity Statistics for England and Wales, year ending 31 March 2010, The NHS Information Centre, July 2010
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- Business Services Organisation, Northern Ireland
- News Release, Optometric Fees Review Committee, June 2011
- Market Statistics for 2010, Association of Contact Lens Manufacturers (ACLM), April 2011

- Community Care Statistics 2009-10: Social Services Activity Report, England, The NHS Information Centre, April 2011
- The College of Optometrists
- Annual Report 2009-10, General Optical Council
- General Ophthalmic Services: Workforce Statistics for England and Wales, 31 December 2010, The NHS Information Centre, May 2011
- Scotland Government