

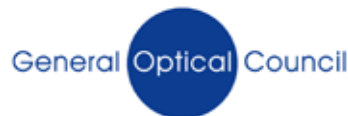
The Optical Workforce Survey

Executive summary

Led by the College of Optometrists in partnership with:



Association of British Dispensing Opticians



Association of Optometrists



SUPPORT FOR PRIMARY EYE CARE DEVELOPMENT



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THE COLLEGE OF OPTOMETRISTS

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Optical Workforce Survey Advisory Group

Association of British Dispensing Opticians

Association of Optometrists

College of Optometrists

Federation of Ophthalmic and Dispensing Opticians

General Optical Council

Local Optometric Committee Support Unit

Optometry Northern Ireland

Optometry Schools Council

Optometry Scotland

Optometry Wales

Foreword



David Parkins
President of the College of Optometrists

The Optical Workforce Survey 2015 follows on from the College's 2010 survey, with one notable exception: this time the survey has been extended to include dispensing opticians in order to gather data designed to support sector-wide trend analysis on key changes affecting the workforce and workforce planning.

Although not exhaustive, it provides a more comprehensive picture of the optometric workforce than ever before. This couldn't have come at a more interesting, or challenging time. The new workforce survey has been conducted against a backdrop of emerging concerns from the College membership, and the wider optical professions, about increasing numbers of optometry students, its impact on competition for jobs and reports of static, or even falling, remuneration.

As a workforce survey, it was designed to measure changes in the workforce since 2010 and gather data on the factors that may affect current and future workforce capacity. So, although it did not directly aim to determine whether there is an over- or undersupply of optical sector professionals in the UK, the results can be used to identify and begin to explore critical questions around this and other factors influencing the workforce. As such, it can help address questions including – what is the current size of the optical workforce? Has the optical workforce increased? How has the optical workforce changed? Does workforce capacity have an impact on income?

The results are fascinating. It finds that, if anything, when weighed against preferences for flexible working, changes to service delivery structures, and key demographic changes in the population, we may in fact be facing an undersupply of the optometric workforce overall, but that there may be pockets of regional oversupply, and more marked undersupply in some geographical areas.

More positively, it finds high levels of job satisfaction, low evidence of any skills gaps and a significant percentage of the workforce pursuing further professional development, over and above the regulator's CET requirements.

It points to a greater move to part-time working, self employment and locum working. It does find some evidence to support members' claims of falling salary levels and it also finds that, seemingly, women may be paid less than men for equivalent roles, even when full-time and part-time working has been controlled for. However it has not been possible to fully examine the potential effects of differences in work setting and specific roles in this report. A more detailed examination of how changes within the sector beyond just the absolute number of optometrists or dispensing opticians trained or registered to practice may now be needed.

All of these things require further and urgent investigation. How should the workforce be trained to take advantage of the needs and opportunities that exist and when do they need to have these skills in place to proactively influence change? What will be the effect of more flexible working arrangements? Does a gender pay gap exist – and if so, how can it be addressed?

Good and bad, these are issues that concern us all and that are not in any single body's gift to solve. That is why we all, as a sector, in the same collaborative way we have conducted the work that underpins this report, will cooperate to find a way forward – the regulator, professional bodies, trade associations, universities and employers alike.

It is in all of our interests to work together to ensure that the optical workforce is distributed to be able to meet the population's needs and is treated equally and rewarded fairly for its work.

Executive summary

Key findings

- **Capacity:** There could be a net loss of capacity in both optometry and dispensing optics if the stated career path preferences of survey respondents within the next five years are representative of the professions as a whole.
- **Demographics:** Based on Optical Workforce Survey (OWS) 2015 data, 65% of optometrists and 70% of dispensing opticians currently work full time.
- **Remuneration:** The percentage of optometrist respondents earning up to £40,000 per year has risen since the survey was last conducted in 2010, while those earning over £40,000 per year has fallen.
- **Remuneration:** The average income of female optometrists and dispensing opticians, in the majority of age groups, was lower than that of their male colleagues, even once part-time working had been taken into account, but whether this was the case for comparable work in comparable settings was not clear.
- **Supply:** A definitive view of whether there was an overall under or oversupply of the optical workforce was not possible to ascertain, but differences in regional supply relative to population throughout the UK were clear.
- **Demand:** The project estimated the current total number of full-time equivalent (FTE) optometrists (based on a scaling up of stated working hours of respondents, calculated as percentage of a FTE) and compared that to an estimate of what number might be considered necessary to serve the current UK population. This estimated that there are currently 12,099 FTE optometrists in the UK, whereas 12,912 FTE optometrists might be needed to meet the needs of the population. However, the complexity involved in any workforce modelling should be remembered – these figures are indicative rather than definitive.
- **Job satisfaction:** Respondents rated their overall job satisfaction and also satisfaction with a list of 10 individual job factors using a scale of 1-7 (1= extremely dissatisfied; 7= extremely satisfied). 80% of optometrists and 79% of dispensing opticians rated their overall job satisfaction 5, 6, or 7.
- **Locum working:** 17.5% of respondent optometrists and 9.1% of respondent dispensing opticians worked primarily as locums. This was a substantial increase from the OWS 2010, which found that 10.5% of optometrists were locum practitioners. This finding supported qualitative data provided by employer stakeholders who thought that an increased number of optometrists seemed to prefer locum work to regular employment.

Recommendations

- **Optical sector bodies:** Optical sector organisations should continue to examine the various factors influencing workforce distribution, demographics and capabilities. Opportunities to improve data capture about the workforce across the sector should be explored and where feasible developed. Without this there is a danger that some regions and communities could be at risk due to limited access to primary eye healthcare professionals.
- **General Ophthalmic Services contracts and geography:** The impact of the current economic and healthcare structures on workforce distribution and availability of services should be explored further. If necessary, mechanisms for increasing workforce mobility and improving the distribution of primary eye healthcare service providers in particular should be considered.
- **Optical sector employers:** Clinical appraisals are a key component to maintaining and developing clinical practice and professional development. Employers of optometrists and dispensing opticians could review current levels of staff appraisal, in particular that relating to clinical practice, with a view to ensuring that appraisals meet the current, complex needs of both optical sector professionals and employers, and developing a future workforce that meets the changing needs of the population.
- **Providers of Continuing Professional Development (CPD):** Providers should review the content of training resources and materials to determine whether this could be developed to better support professionals who are working part time or self employed or in locum roles.
- **Equality and diversity:** Employers should consider whether there is equality of opportunity for all employees by examining pay, appraisal and career progression and promotion.

About the Optical Workforce Survey 2015

The aim of the Optical Workforce Survey 2015 (OWS 2015) was to provide an up-to-date view of the primary eye healthcare workforce in the UK. In 2010, the College of Optometrists completed an Optometric Workforce Survey (OWS 2010) to gather data on the optometry profession in the UK and to provide baseline data that could be used to investigate trends for the dual purposes of workforce planning and for the wider development of the profession.

Led by the College with support from the cross-sector project Advisory Group, the OWS 2015 analysed quantitative and qualitative data to examine how the workforce has changed since 2010 and to identify factors influencing the work of the optical professions in the next five years, including workforce capacity and the adequacy of the optical workforce to meet demand. The scope of the OWS 2015 was extended to include dispensing opticians in order to ensure a more complete picture of the optometric workforce, and qualitative interviews for additional detail. The research took place between December 2014 and October 2015.

The objectives of the OWS 2015 were:

1. to describe the characteristics of the optometrist and dispensing optician workforces
2. to measure changes in the optometric workforce since the OWS 2010
3. to assess the potential and limitations of existing data to quantify the current optometrist and dispensing optician workforces
4. to explore factors that could impact on future workforce capacity

Methodology

The main research methods included:

- a structured questionnaire, with versions for optometrists and dispensing opticians
- semi-structured interviews with a sample of stakeholders from the optical sector to provide background information on optical workforce issues and to provide further insight into issues raised in the questionnaires
- desk research on workforce planning and optical workforce studies

The survey sample

The sample for the optometrist survey was a randomised sample of 2,000 College members. For the dispensing optician survey, a census approach was taken, on the advice of the Association of British Dispensing Opticians (ABDO). A link to the online survey was sent to all recipients of the ABDO newsletter (~ 8,000 members) with an invitation for all fully qualified members (approximately 5,700, excluding students, retired members, and international members) to reply.

The combined response rate (online and postal questionnaires) for optometrists was 641 questionnaires (32.05%). The response rate for dispensing opticians was 577 online questionnaires (10.1%). However, a number of respondents in both groups dropped out at the first forced choice question; the total number of optometrist questionnaires completed to the end was 598 (29.9%) and the total number of dispensing optician questionnaires completed was 453 (7.9%).

Both versions of the questionnaire covered the following areas:

- education, training and professional development
- workplace and clinical profile
- job satisfaction
- workforce
- personal profile
- geography
- family
- health

Interviews were conducted with stakeholders, including optometrists, dispensing opticians, academics, optical professionals working in the devolved nations, national employers, members or representatives of professional bodies, students, and other optical sector professionals. Interviews covered the following topics:

- factors relevant to reviewing and planning the optical workforce
- changes to the workforce
- motivation to enter, stay in, or leave an optical sector profession
- best and worst things about being an optometrist or dispensing optician
- strengths and weaknesses of the optical workforce

Results

Gender: The majority of survey respondents in both professions were female: 57.5% of optometrists and 53.5% of dispensing opticians. The gender balance within the optometrist questionnaire is within 2% of the General Optical Council (GOC) registration data, suggesting that the sample was representative in terms of gender. Most of the interviewees commented on the changing gender demographics of the optical professions; the professions were male dominated a generation ago, but after a gradual change, females now formed the majority of the professions.

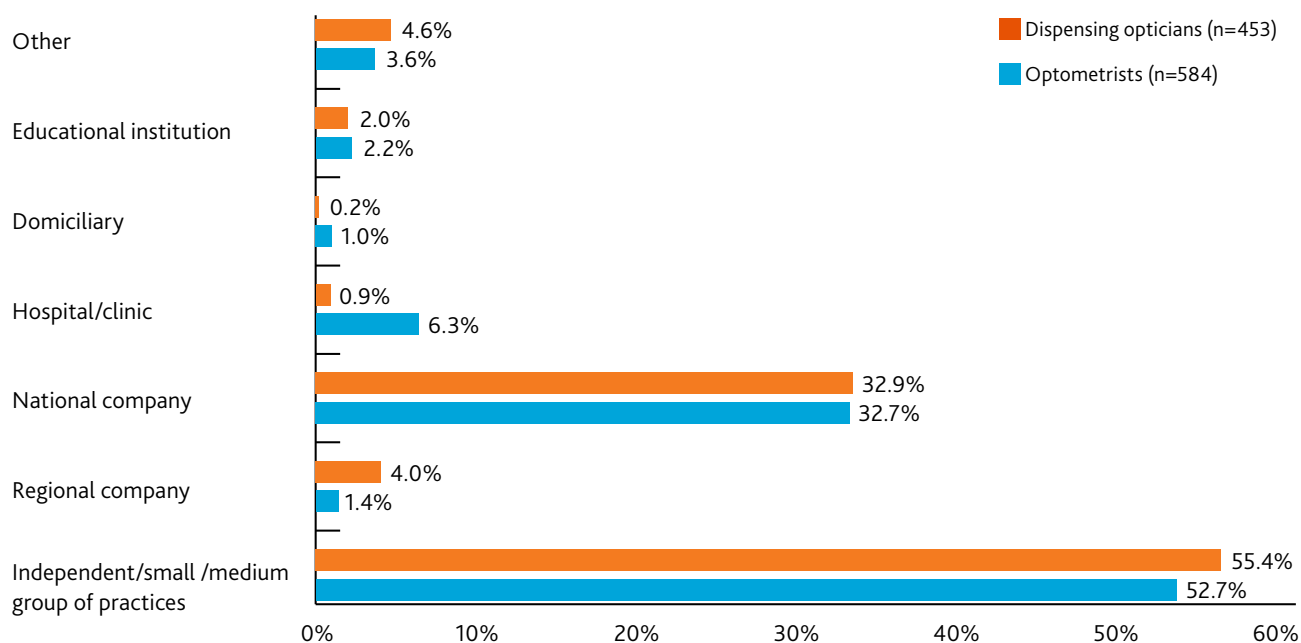
Age: GOC data and OWS 2010 and 2015 data support the hypothesis that the optometry workforce is ageing. This is despite increases in the numbers joining the register.

Table showing GOC registration data (age of optical workforce registrants in years)

OPTOMETRISTS	25 OR UNDER	26-39	40-54	55+
2010	6%	48%	32%	15%
2011	6%	48%	31%	15%
2012	6%	48%	31%	15%
2013	5%	43%	28%	23%
DISPENSING OPTICIANS				
2010	3%	42%	41%	15%
2011	3%	42%	42%	14%
2012	3%	41%	40%	16%
2013	2%	38%	40%	20%

Place of work: Respondents to the survey were mostly employed in independent practice settings. For both optometrists and dispensing opticians, those working in settings for large national companies were under-represented in the survey sample as the percentage working in those settings are widely recognised to be much higher than the percentages chart on page 9.

Figure showing primary work base of survey respondents



Hours of work: In terms of full-time or part-time working, 59.1% of optometrists worked full time compared with 70.9% of dispensing opticians. Women represented the greatest percentages of part-time workers, both employed and self-employed, across both professional groups. Respondents' hours worked were used to calculate how many worked full time, and for those in a part-time role, their FTE. Based on this, 65% of optometrists and 70% of dispensing opticians worked full time.

Annual income: The mean annual income reported by optometrists was £44,328 per year, but the standard deviation was wide – £33,562. The median point of £39,500 and the mode of £40,000 indicate that a better average measure would be approximately £40,000 per year.

For dispensing opticians, the median point was £26,000 and the mode was £30,000 so an estimate of average annual salary would be between £26,000 and £30,000. The mean annual income for dispensing opticians was £44,728, but the standard deviation was £118,635; removing the top and bottom per cent (outliers), the mean salary for dispensing opticians reported was £34,606, with a standard deviation of £57,063.

Although charts on page 10 appear to show that women earn less on average in most age groups than men, even once full-time/part-time working has been controlled for, the possible effects of differences in work settings and specific roles has not been examined. So while on average, across all roles and settings and in almost all age groups, women earn less than men, it is not possible to determine whether there are specific inequalities in terms of men and women being paid equally for the same work.

Figure 12: Optometrist average income by age and gender (controlled for part-time working)

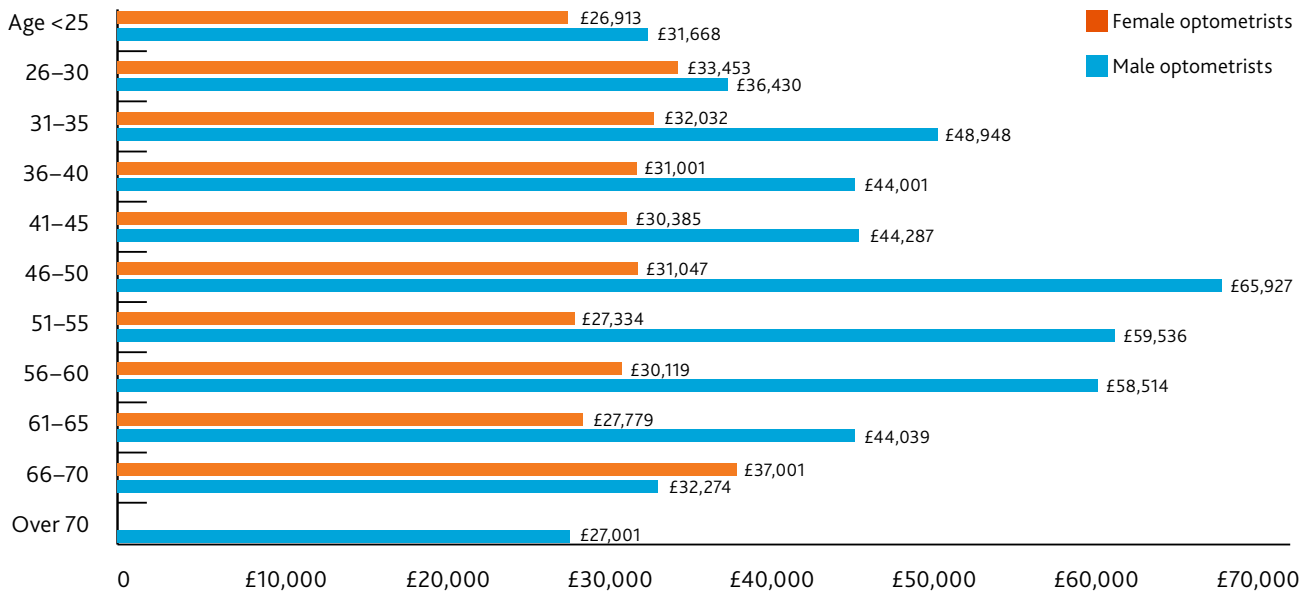
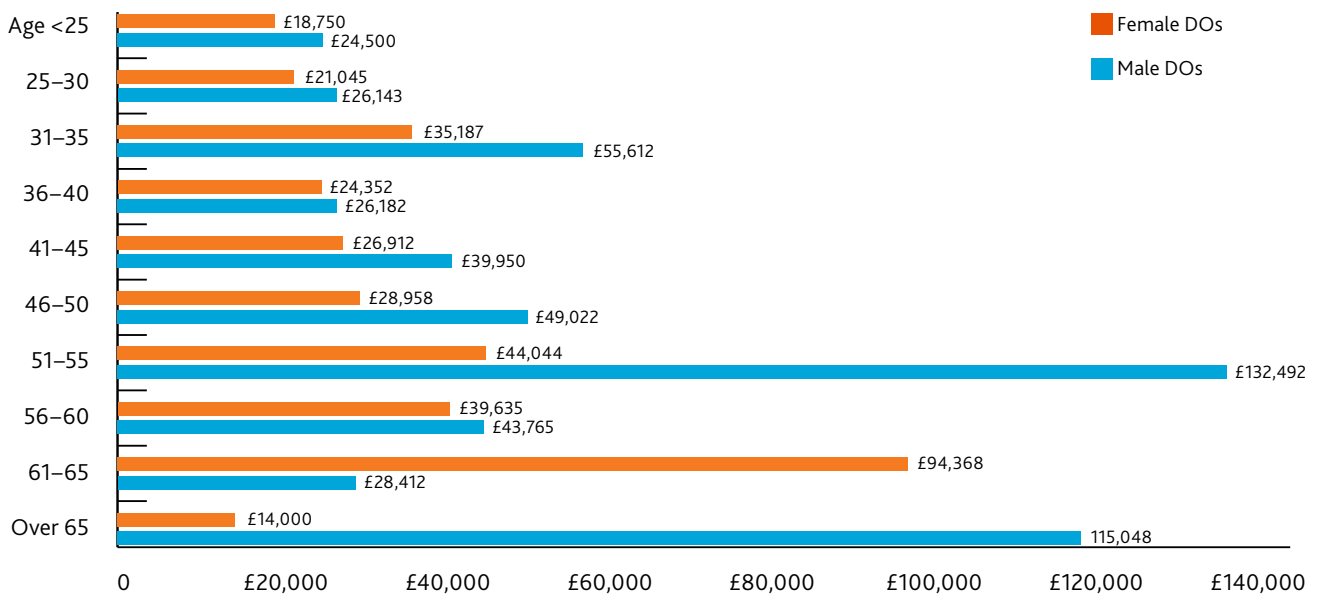


Figure 13: Dispensing optician average income by age and gender (controlled for part-time working)



Job satisfaction: Respondents rated their overall job satisfaction and satisfaction with a list of 10 individual job factors using a scale of 1-7 (1= extremely dissatisfied; 7= extremely satisfied); 80% of optometrists and 79% of dispensing opticians rated their overall job satisfaction 5, 6, or 7.

Career preferences within the next five years: Flexible working was the future career preference chosen by the highest percentage of respondents from both professional groups, as selected by 45.7% of optometrists and 35.6% of dispensing opticians; 24.3% of optometrists and 13.5% of dispensing opticians would like to decrease their working hours. Only 4.7% of optometrists and 4.5% of dispensing opticians would like to increase their working hours, but this could be a reflection of the fact that most already work full time. Based on the numbers of annual new entrants to the professions being significantly smaller than those indicating they would like to decrease their hours, there could be a net loss of capacity in both professions if the career choices of respondents within the next five years are representative of the professions as a whole.

Discussion

How does the OWS 2015 optometrist questionnaire data compare with the data from the OWS 2010?

The OWS 2010 collected data from a much larger sample (3,122 compared with 641 in 2015) and did not include dispensing opticians.

- OWS 2015 data shows a slight decrease in the percentage of female optometrist respondents (57.9%), down from 60.6% in OWS 2010.
- The percentage of respondents employed full time decreased from 48.6% (2010) to 39.4% (2015). However, respondents who answered full-time self-employed increased from 12.8% (2010) to 18.8% (2015).
- Similarly, part-time employed respondents decreased from 25.7% (2010) to 19.7% (2015) and part-time self-employed optometrists increased from 11.6% (2010) to 17.1% (2015).
- In terms of annual income, there was an increase in the percentage of respondent optometrists earning less than £30,000 per year, up from 23.8% (2010) to 31.0% (2015) and those earning £30,000 to £40,000 per year, 26.4% (2015) as compared with 24.0% in 2010.
- There was also a decrease in respondent optometrists earning more than £40,000 per year. However, it should be noted the annual income data does not take into account the number of hours worked.

What is the actual size of the optical workforce and what is the demand?

There is no single data set providing a definitive number of practising optometrists and dispensing opticians. According to the GOC registers, which record information on the gender and age of all fully qualified and student optometrists and dispensing opticians, in 2013 there were 13,589 optometrists and 6,244 dispensing opticians.

The OWS 2015 extrapolated collected FTE data onto total individual practitioner figures obtained via reports from the Health & Social Care Information Centre (2014), NHS Education for Scotland (2013) and Northern Ireland Health and Social Care (2013) to provide an estimated number of FTE optometrists in each country. Applying this formula to each of the four countries in the UK, the estimated number of FTE optometrists is as follows:

• England	9,856
• Northern Ireland	508
• Scotland	1,068
• Wales	667
Total FTE	12,099

The OWS 2015 also included a calculation of respondents' average sight test consultation time, which was then applied to the UK population using a number of assumptions about an individual optometrist's capacity: average time spent per patient consultation; average hours spent on patient contact per week; and number of eye examinations per year (including for those conducted more frequently, on the elderly and the very young) (see Section 4.4.4).

Applying these assumptions to the Office for National Statistics (ONS) 2013 population estimates suggested that meeting the needs of the UK population would require 12,912 FTE optometrists. It should be noted, however, that this is a rough calculation and that both regional differences in supply and demand and the complexity of workforce modelling (see Section 4.4) make an overall figure less meaningful.

How has the optical workforce changed, and why?

Section 4.3.3 pulls together survey data and information from several sources to identify and explore a number of emerging themes, including:

- shifting demographics (by gender, age, and ethnicity);
- the characteristics of those who work part time (by gender; whether they have dependent children or not; and by stated career preferences within the next five years); and
- the prevalence of locum working.

The OWS 2015 also addressed the question of whether workforce capacity has had an effect on income, contextualising the survey data on annual income from 2010 and 2015. Stakeholder interviews conducted for the OWS 2015 put forward at least two additional drivers for perceived falling incomes:

- regional variations in the numbers of optical professionals across the UK, and in particular in areas surrounding the optometry schools; and
- market forces and competition in the optical sector, for example, the market share of national retailers, and the impact of strategic practices involving advertising and arrangements around paying optical professionals for an eye examination.

Concluding remarks

Cross-sector cooperation is needed to improve data to inform workforce planning, and promoting equal workforce capacity in all regions of the UK requires all parties to work together – until then, there is a risk that some populations will be disadvantaged in terms of eye healthcare. If this is the case, the first objective of workforce planning will not be achieved: having the *right number*, in the *right place*, at the *right time*, with the *right skills* to provide the *right services*.

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