

Optics at a Glance has been the key source of information about optometry, opticians, the UK optical market and services for 32 years. This issue includes data on sight tests, spectacles and contact lenses provided by members of the Optical Confederation.

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^{2,3,4} (N.B. 2008 – 2012 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 with 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)

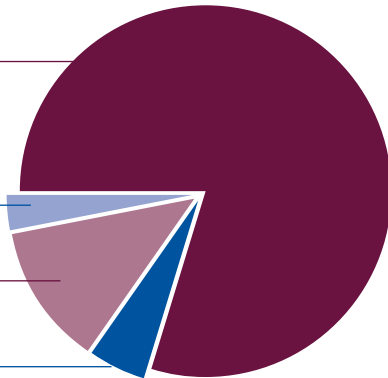
NHS sight tests Year to 31 March 2012

England 12.306 million⁵

N. Ireland 435,000⁸

Scotland 1.914 million⁷

Wales 767,000⁶



NHS demand rose by an average of 3.1% in England, 3.2% in Wales, 2.8% in N. Ireland and 6.0% in Scotland over the previous year.

Estimated private sight tests Year to 31 March 2012

All private sight test figures cited below 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 N. Ireland have been calculated using the same method. Figures for Scotland are based on an estimate from FODO Scotland.

England 5.633 million
Wales 351,000
Scotland 160,000
N. Ireland 199,000

Total	21.76 million
NHS	15.42 million (70.9%)
Private*	6.34 million (29.1%)

SIGHT TESTS IN MILLIONS (UK / GB)

Year	Private*	NHS
11-12 (UK)	6.3	15.4
10-11 (UK)	6.2	14.9
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

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 rose slightly to £20.90 for the year 1 April 2013 to 31 March 2014 (2010 – 2012 figure £20.70). However, in Scotland the NHS primary eye examination fee paid to contractors is £37 for adults under 60, £45 for adults over 60 with photograph (£40 without) and the NHS supplementary eye examination fee is £21.50.

SIGHT TESTS AND DISPENSING

Optical Confederation survey data for April 2011 – March 2012

Private sight test fees

In the survey of Optical Confederation members the average charge to patients for a private sight test, excluding 'no-charge', discounts and special offers, increased to £22.24. 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	63.5%
referral to GP or hospital	5%

Contact lenses

contact lens fitting fee	£40.89
annual contact lens care fee	£34.95

Sight test intervals

- The average interval between sight tests increased to 27 months, with an estimated average interval for working age adults increasing to 30 months.

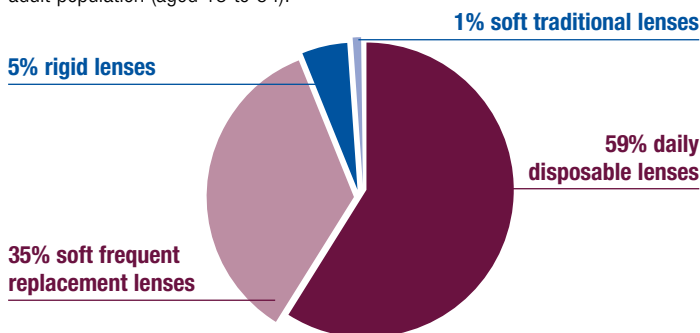
Spectacles dispensed

- In the survey, the proportion of re-glazed spectacles, when new lenses are put into old frames, increased slightly to 6.8%.
- 100% of practices stocked spectacles for children, and 93% for adults, within NHS voucher values (which range from £37.50 to £207.20). N.B. Many patients exercise their right to use a voucher as part payment towards higher value options.

*All private sight test figures are estimates.

CONTACT LENSES

In the Optical Confederation survey an average of 11% of sight tests resulted in patients choosing to trial contact lenses. According to the Association of Contact Lens Manufacturers (ACLM), wearers in 2012 numbered 3.7 million – 9% of the adult population (aged 15 to 64).¹⁰



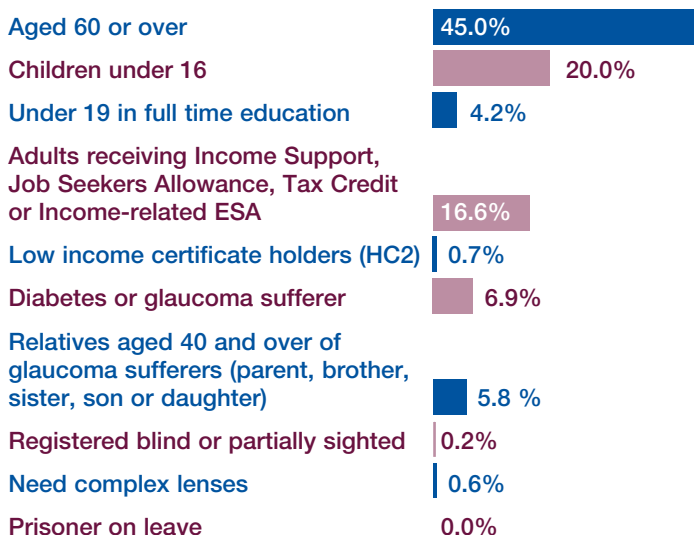
DOMICILIARY EYECARE

- Patients who are eligible for an 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 2011-12, 1.23 million adults received care services in their own home provided by councils following a community care assessment – a decrease of 8.2% from 2010-11. A further 219,700 adults were living in residential or nursing care homes as of 31 March 2012¹¹. The majority of these would be eligible for a free NHS domiciliary test.
- In the UK in 2011-12 a total of 481,674 domiciliary sight tests were carried out, suggesting that many vulnerable people are still missing out on vital eye care.

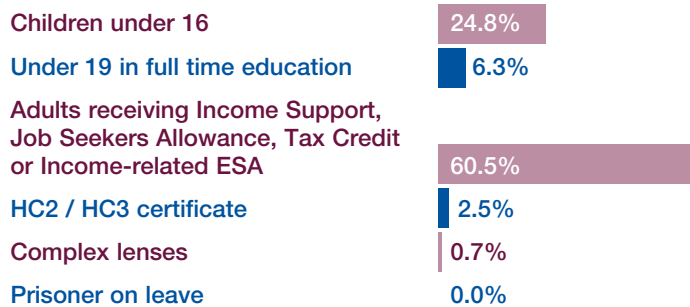


NHS ELIGIBILITY

NHS Sight Tests (England) 2011/12⁵ (split by eligibility category)



VOUCHERS (England) 2011/12⁵ (split by eligibility category)



England: 4.6 million NHS vouchers were processed in 2011-12

INVESTMENT IN EDUCATION

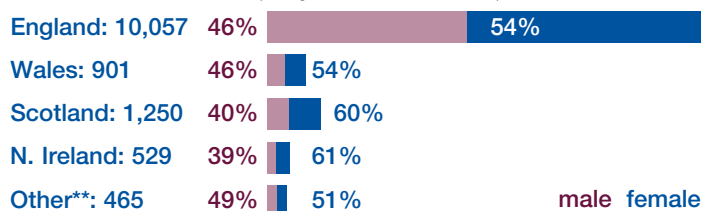
High quality education and training are central to the high quality services opticians provide. In 2011/12, 80.5% of pre-registration training places for optometrists were provided by the major optical businesses¹². Continuing Education and Training (CET) became a legal requirement for practitioners in July 2005. The Department of Health provides a grant towards loss of earnings in respect of optometrists and OMPs undertaking CET, set at £516 for CET undertaken in 2012⁹.

REGISTERED PRACTITIONERS

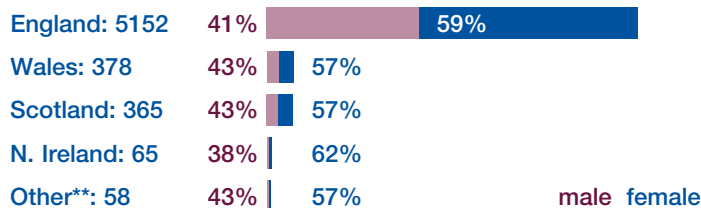
Comprehensive professional services are only available from registered opticians.

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 13,202 registered optometrists in the UK at the end of 2011¹³ (rising from 12,761 in 2010).



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 6,018 dispensing opticians in the UK registered with the GOC at the end of 2011¹³ (rising from 5,821 in 2010).



Ophthalmic Medical Practitioners (OMPs) are doctors who specialise in eye care. There were approximately 398 OMPs in the UK at 31 December 2011 (England 324¹⁴, Wales 12¹⁴, Scotland 41^{***}, N.Ireland 21⁹) who conducted fewer than 1% of NHS sight tests during the year ending 31 March 2012 (England 0.2%⁵, Wales 0.2%⁶, Scotland 0.04%⁷, N.Ireland (not available)). OMPs are regulated by the General Medical Council.

Example: practitioner working overseas. *the OMP figure for Scotland has not been updated in 2012 due to lack of data.

Sources

- 1 Health Survey for England, 2001
- 2 *General Ophthalmic Services: Workforce Statistics for England and Wales*, 31 December 2006, The NHS Information Centre, Government Statistical Service 2007
- 3 NHS National Services Scotland 2007
- 4 Central Services Agency Northern Ireland 2007
- 5 *General Ophthalmic Services: Activity Statistics – England, year ending 31 March 2012*, The NHS Information Centre, 12 July 2012
- 6 *Ophthalmic Statistics for Wales, 2011 -2012*, Welsh Government, 31 May 2012
- 7 *ISD Scotland Report, General Ophthalmic Services Statistics*, NHS Scotland, 31 July 2012

- 8 (HSC) Business Services Organisation, Northern Ireland
- 9 Gateway Reference 18854 – Letter, Department of Health, March 2013
- 10 *Market Statistics for 2011*, Association of Contact Lens Manufacturers (ACLM), April 2012
- 11 *Community Care Statistics 2011-12: Social Services Activity Report*, England, The NHS Information Centre, February 2013
- 12 The College of Optometrists
- 13 *Annual Report 2011-12*, General Optical Council
- 14 *General Ophthalmic Services: Workforce Statistics for England and Wales*, 31 December 2011, The NHS Information Centre, March 2012