

Optics at a Glance has been the key source of information about optometry, opticians, the UK optical market and services for 33 years. It 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 – 2013 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)

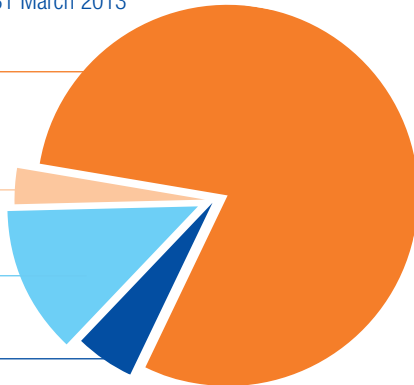
NHS sight tests Year to 31 March 2013

England 12.339 million⁵

N. Ireland 437,700⁶

Scotland 1.927 million⁷

Wales 768,000⁸



NHS demand rose by an average of 0.3% in England, 0.8% in N. Ireland, 0.7% in Scotland and 0.1% in Wales over the previous year.

Estimated private sight tests Year to 31 March 2013

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 extrapolated from the *2014 Northern Ireland Sight Test & Ophthalmic Public Health Survey*, which now shows a lower percentage of private sight tests than previously estimated. This means the Northern Ireland sight test figure for 2013 is lower than that published in 2012, with a consequential impact on national figures. Figures for Scotland are based on an estimate from FODO Scotland.

England 5.648 million
Wales 351,500
Scotland 160,000
N. Ireland 152,400

Total	21.78 million	
NHS	15.47 million	(71%)
Private*	6.31 million	(29%)

SIGHT TESTS IN MILLIONS (UK/GB)

Year	Private*	NHS
12-13 (UK)	6.3	15.5
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

NHS SIGHT TEST FEES

- In Scotland, free NHS eye examinations are available to all. However, in England, Northern Ireland and Wales 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, Northern Ireland and Wales increased to £20.90 for the year 1 April 2013 to 31 March 2014⁹ (2010-12 figure £20.70 and 2008-09 figure £19.80). 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 £21.50¹⁰.

SIGHT TESTS AND DISPENSING

Optical Confederation survey data for April 2012 – March 2013

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 £25.18. 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

Referral to GP or hospital = 2.9% (a decrease from 5% in 2012)

Contact lenses

Contact lens regular payment = 60.2%

Annual contact lens care fee = £42.53

Sight test intervals

The average interval between sight tests decreased to 24 months, with an estimated average interval for working age adults increasing to 30 months.

Spectacles dispensed

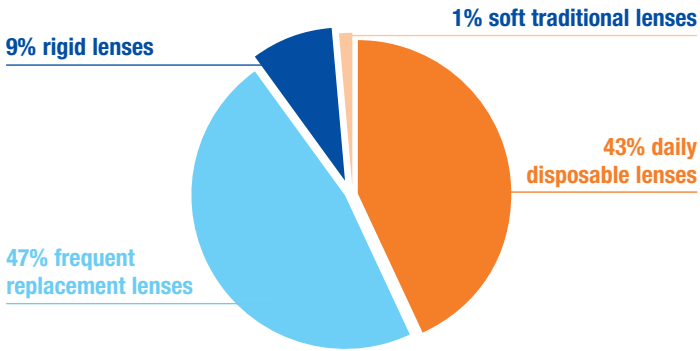
- In the survey, 93.3% of practices stocked spectacles for children, the same percentage for adults, within NHS voucher values (which range from £37.50 to £207.20)**. Approximately 73% of vouchers claimed were for the lower figure in this range (voucher A)⁵. N.B. Many patients exercise their right to use a voucher as part payment towards higher value options.
- The proportion of re-glazed spectacles, when new lenses are put into old frames, increased to 9.8%.

*All private sight test figures are estimates.

** Voucher values as of April 2013

CONTACT LENSES

According to the Association of Contact Lens Manufacturers (ACLM), wearers in 2012 numbered 3.714 million – 9% of the adult population (aged 15 to 64)¹¹.



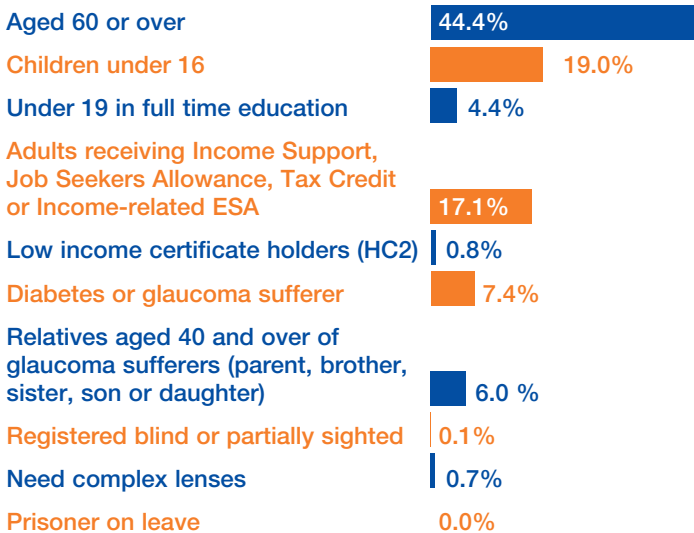
DOMICILIARY EYECARE

- 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 2012-13, 1.102 million adults received care services in their own home provided by councils following a community care assessment – a decrease of 10% from 2011-12. A further 219,455 adults were living in supported residential or nursing care homes as of 31 March 2013 (a slight decrease from 31 March 2012)¹². The majority of these would be eligible for a free NHS domiciliary test.
- In the UK in 2012-13 a total of 495,797 domiciliary sight tests were carried out, suggesting that many vulnerable people are still missing out on vital eye care.

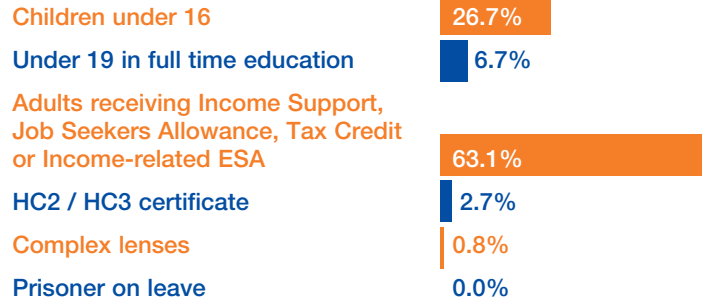


NHS ELIGIBILITY

NHS Sight Tests (England) 2012/13⁵ (split by eligibility category)



VOUCHERS (England) 2012/13⁵ (split by eligibility category)



England: 4.58 million NHS vouchers were processed in 2012-13

INVESTMENT IN EDUCATION

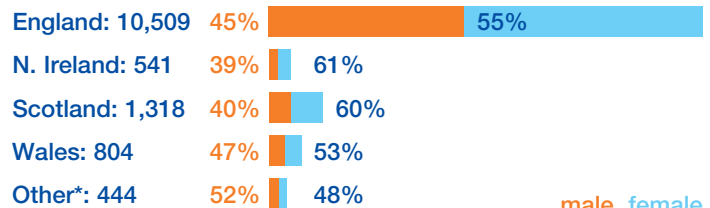
High quality education and training is central to the high quality services opticians provide. In 2012/13, 84% of pre-registration training places for optometrists were provided by the major optical businesses¹³. Continuing Education and Training (CET) became a legal requirement for practitioners in July 2005. The Department of Health provides a grant towards loss of earnings in respect of optometrists and OMPs undertaking CET, set at £529 for CET undertaken in 2013¹⁴.

REGISTERED PRACTITIONERS

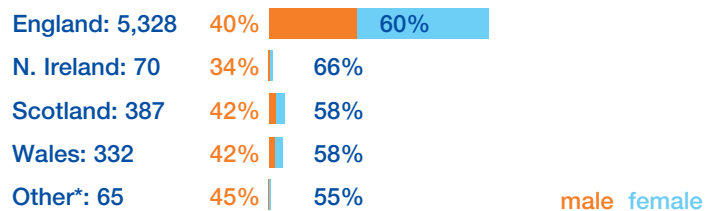
Comprehensive professional services are only available from registered opticians.

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).

According to the GOC there were a total of 13,616 registered optometrists in the UK at the end of 2012¹⁵ (rising from 13,202 in 2011).



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 6,182 dispensing opticians in the UK registered with the GOC at the end of 2012¹⁵ (rising from 6,018 in 2011).



Ophthalmic Medical Practitioners (OMPs) are doctors who specialise in eye care. There were approximately 380 OMPs in the UK at 31 December 2012 (England 304¹⁶, Scotland 41^{**}, N.Ireland 21⁶, Wales 14¹⁶) who conducted less than 1% of NHS sight tests during the year ending 31 March 2013 (England 0.19%⁵, Scotland 0.13%⁷, N.Ireland 0.2%¹⁷, Wales 0.2%⁸). OMPs are regulated by the General Medical Council.

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, 2012/13, The NHS Information Centre, 18 July 2013

6 Annual Health Service Ophthalmic Statistics in Northern Ireland (2012/13), Business Services Organisation, 30 September 2013

7 General Ophthalmic Services Statistics, ISD Report, NHS Scotland, 27 August 2013

8 Eye Care Statistics for Wales, 2012-13, Welsh Government, 5 June 2013

9 Gateway reference: 18854 – Letter, Department of Health, 26 March 2013

10 Memorandum to NHS: PCA(O)(2014)1, Health and Social Care Integration Directorate, Scotland Government, 21 January 2014

11 ACLM Market Report for 2012: Technical Summary, Association of Contact Lens Manufacturers (ACLM), April 2013

12 Community Care Statistics: Social Services Activity, England, 2012-13, Health & Social Care Information Centre, 17 December 2013

13 The College of Optometrists

14 Department of Health, General Ophthalmic Services, Increases to NHS Sight Test Fee, continuing education and training payment and pre-registration supervisors grant, letter, 1 July 2014

15 Annual Report 2012-13, General Optical Council

16 General Ophthalmic Services: Workforce Statistics for England and Wales, 31 December 2012, The NHS Information Centre, 19 March 2013

17 Health and Social Care Board, Belfast