

Optics at a Glance has been the key source of information about optometry, opticians, the UK optical market and services for 31 years. This year 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.

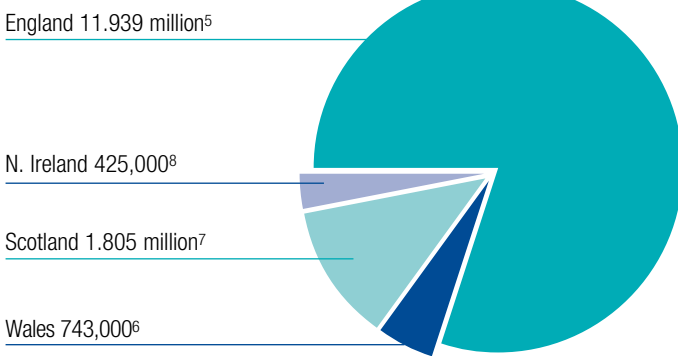
OPTICIANS' PREMISES

In 2007 there were approximately 7,250 opticians' premises in the UK^{2,3,4} (N.B. 2008 – 2011 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 2011



NHS demand rose by an average of 1.1% in England, 1.1% in Wales, 3% in N. Ireland and 1.6% in Scotland over the previous year.

Estimated private sight tests Year to 31 March 2011

All private sight test figures cited below are estimates. 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	5.465 million
Wales	340,000
Scotland	160,000
N. Ireland	195,000

Total	21.1 million
NHS	14.9 million (70.8%)
Private	6.2 million (29.2%)

SIGHT TESTS IN MILLIONS (UK / GB)

Year	Private*	NHS
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
04-05 (GB)	6.0	11.7

*All private sight test figures are estimates.

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 2010/11⁹ (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, and the NHS supplementary eye examination fee is £21.50.

SIGHT TESTS AND DISPENSING

Optical Confederation survey data for April 2010 – March 2011

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, was £21.67. 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	62%
contact lenses	6%
referral to GP or hospital	4%

Sight test intervals

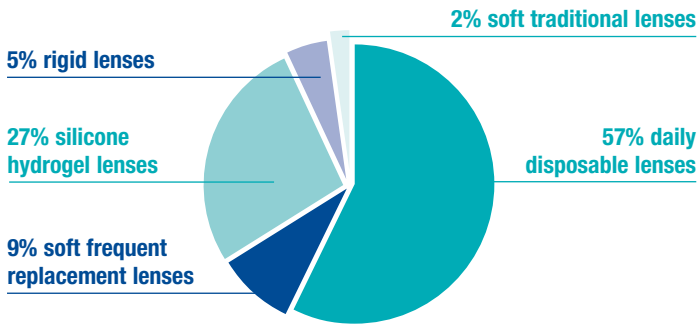
- The average interval between sight tests remained the same at 26 months, with an estimated average interval for working age adults remaining at 29 months.

Spectacles dispensed

- In the survey, the proportion of re-glazed spectacles, when new lenses are put into old frames, increased slightly to 6.5%.
- 100% 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 higher value options.

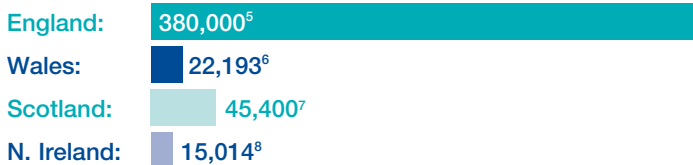
CONTACT LENSES

In the Optical Confederation survey an average of 6% of sight tests resulted in patients choosing to take up contact lenses. According to the Association of Contact Lens Manufacturers (ACLM), wearers in 2010 numbered 3.6 million – 7.2% of the adult population.¹⁰



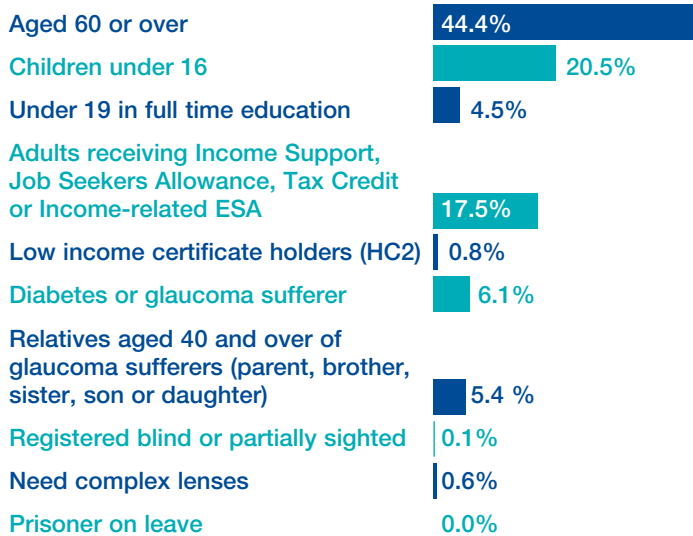
DOMICILIARY EYECARE

- 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 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 2008-9.¹¹ The majority of these would be eligible for a free NHS domiciliary test.
- In the UK in 2010-11 a total of 462,607 domiciliary sight tests were carried out, suggesting that many vulnerable people are still missing out on vital eye care.



NHS ELIGIBILITY

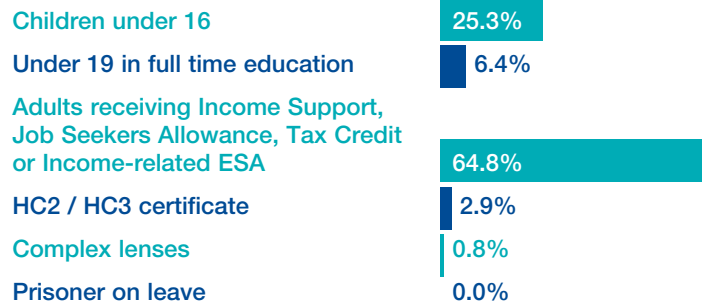
NHS sight tests (England) 2010/11⁵ (split by eligibility category)



Sources

- 1 Health Survey for England, 2001
- 2 *General Ophthalmic Services: Workforce Statistics for England and Wales, 31 December 2006*, The NHS Information Centre, 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 2011*, The NHS Information Centre, July 2011
- 6 *Ophthalmic Statistics for Wales, 2010-2011*, Welsh Government, 26 May 2011
- 7 *ISD Scotland Report, General Ophthalmic Services Statistics*, NHS Scotland, 26 July 2011

VOUCHERS (England) 2010/11⁵ (split by eligibility category)



England: 4.5 million NHS vouchers were processed in 2010-11

INVESTMENT IN EDUCATION

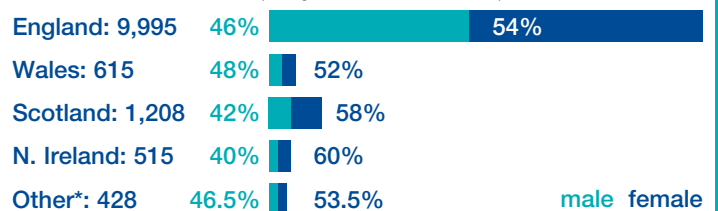
High quality education and training is central to the high quality services opticians provide. In 2010/11, 82% of pre-registration training places for optometrists were provided by the major optical businesses.¹² Continuing Education and Training (CET) became a legal requirement for practitioners in 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 2011/12.⁹

REGISTERED PRACTITIONERS

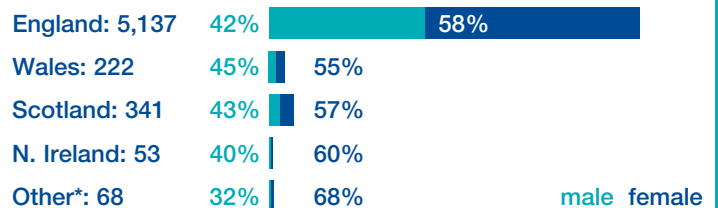
Comprehensive professional services are only available from registered opticians.

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 12,761 optometrists registered in the UK at the end of 2010¹³ (rising from 12,414 in 2009).



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 5,821 dispensing opticians registered in the UK with the GOC at the end of 2010¹³ (rising from 5,723 in 2009).



Ophthalmic Medical Practitioners (OMPs) are doctors who specialise in eye care. There were approximately 407 OMPs in the UK at 31 December 2010 (England 330¹⁴, Wales 16¹⁴, Scotland 41¹⁵, N.Ireland 20⁹) who conducted less than 1% of NHS sight tests during the year ending 31 March 2011 [England 0.3%⁵, Wales 0.2%⁶, Scotland 0.1%⁷, N.Ireland 0.85%⁸]. OMPs are regulated by the General Medical Council.

*Example: practitioner working overseas.

8 (HSC) Business Services Organisation, Northern Ireland

9 *News Release*, Optometric Fees Review Committee, June 2011

10 *Market Statistics for 2010*, Association of Contact Lens Manufacturers (ACLM), April 2011

11 *Community Care Statistics 2009-10: Social Services Activity Report*, England, The NHS Information Centre, April 2011

12 The College of Optometrists

13 *Annual Report 2010-11*, General Optical Council

14 *General Ophthalmic Services: Workforce Statistics for England and Wales, 31 December 2010*, The NHS Information Centre, May 2011

15 Scotland Government