



Understanding the CL consumer

Part 1 - Buying habits and customer loyalty



The Association of Contact Lens Manufacturers

Contact lens practitioners tend to view the challenges facing the profession as other people's problems rather than their own. 'I rarely lose patients to other practices', 'My patients wouldn't buy their lenses online' or 'I don't have a problem with drop-out' are just some of the comments we hear.

Yet according to new research carried out by the Association of Contact Lens Manufacturers (ACLM) and *Optician*, practitioners are not immune from the major issues hindering growth in the contact lens market or unaffected by wider retail trends.

Optician has worked closely with the ACLM over a decade and more, conducting extensive research into consumer attitudes to contact lenses and practitioner attitudes to fitting them. The ACLM is now looking at new ways to support the profession and boost the proportion of the British public wearing contact lenses.

The aims of the latest research are to show practitioners how they are viewed by their patients, motivate them to improve their practice strategies and help them increase their contact lens business. The research explores five key areas in relation to contact lens habits and attitudes:

- Loss of sales to the internet
- Poor customer loyalty
- Low footfall in practices
- Dropout from contact lens wear
- Health and health scares.

In the first of two articles, we report on consumers' purchasing and

The latest *ACLM/Optician* research uncovers some revealing attitudes to contact lens purchasing and serves as a wake-up call for practitioners, writes **Alison Ewbank**

check-up habits, and examine loyalty and satisfaction with their contact lens practitioner and supplier.

The survey

The fieldwork was conducted by market research company TNS Global as an online, self-completion survey in March 2013. A total of 2,463 British adults aged 16 and over completed the survey. All results are weighted to ensure they are representative of the British population aged 16+.

Of the total weighted base, 222 (9 per cent) currently wear contact lenses and a further 258 (10 per cent) have worn contact lenses in the past. Half wear spectacles but have never worn contact lenses and the remaining 31 per cent do not require vision correction.

Respondents have a variety of lens-wearing experience, from less than a year (6 per cent) to more than 10 years (43 per cent). Sixty per cent currently wear re-usable lenses and 40 per cent daily disposables. Young people aged 16-24 years are more likely to be wearing daily disposables than older age groups, especially those aged 55+ (47 per cent vs 17 per cent).

Where do CL wearers buy their lenses?

More than half of current wearers (55 per cent) usually buy their lenses from a multiple/high street chain, compared to

23 per cent buying from independents and 10 per cent from supermarket-based opticians (Figure 1).

But one of the key findings of the survey was that 10 per cent of wearers usually buy their lenses over the internet. A further 17 per cent who do not usually buy online have done so in the past, and a further 26 per cent have either considered or researched it (Figure 2).

In other words just over half of current wearers (53 per cent) have used, considered or researched the internet for buying contact lenses.

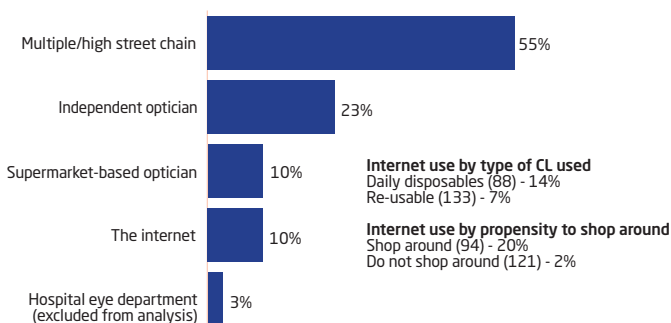
A majority of those who buy online are buying daily disposables (58 per cent) rather than re-usable lenses. In fact 14 per cent of those who use daily disposables buy their lenses online, compared to only 7 per cent of re-usable lens wearers.

More concerning for practitioners is that 41 per cent of wearers say they are likely to buy their lenses over the internet in future (Figure 3). Again, daily disposable users are more likely than reusable lens wearers to make future purchases online.

Likelihood of buying online in future differs little between those who currently buy from independents and multiples, but those who buy from supermarket-based opticians are more likely to say they will buy online.

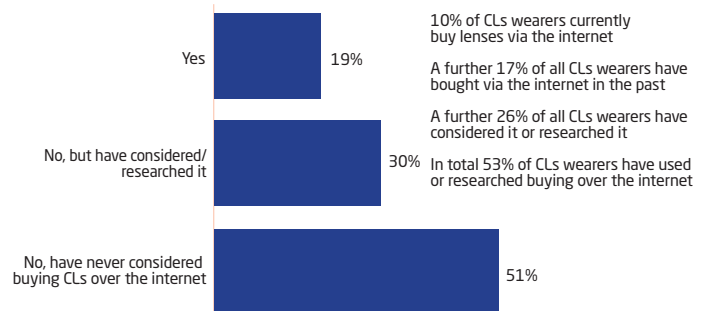
Price sensitivity among wearers is surprisingly high with 42 per cent

Figure 1 Where usually buy CLs



Base: UK adults 16+ who currently wear CLs n=222

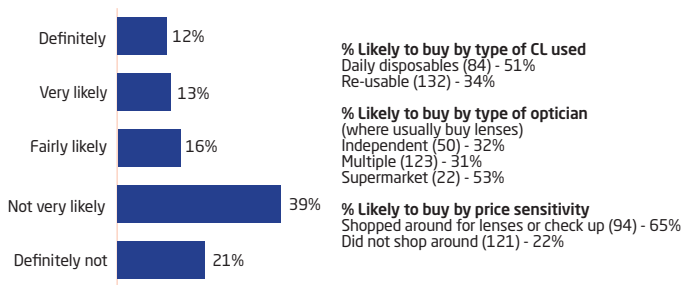
Figure 2 Whether have ever bought CLs over the internet



Base: UK adults 16+ who currently wear CLs and do not usually buy lenses online n=195

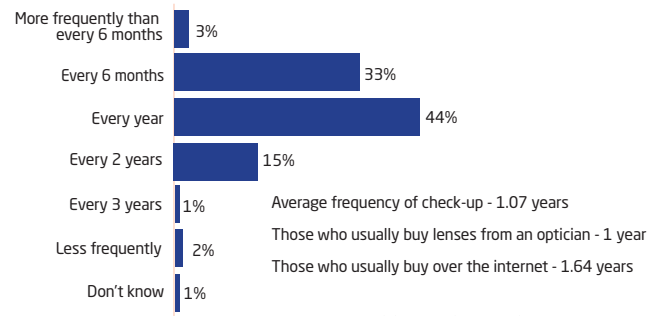


Figure 3 Likelihood to buy CLs over the internet in future



Base: UK adults 16+ who currently wear CLs n=216

Figure 4 Frequency of CL check-up



Base: UK adults 16+ who currently wear CLs n=216

claiming to shop around to compare prices for lenses before buying. Daily disposables users are more likely to shop around, than those wearing re-usable lenses (55 per cent vs 33 per cent), as are those who use an independent for their check-up (51 per cent).

Men are more likely to shop around for lens prices than women (57 per cent vs 32 per cent) and also to buy online in future (51 per cent vs 33 per cent).

Wearers who buy lenses over the internet are the most price-sensitive group (88 per cent shop around), but half of those whose last check-up was at an independent (51 per cent) are also shopping around to compare prices. And 20 per cent of wearers with a propensity to shop around usually buy their lenses online, twice the proportion for all wearers.

Two thirds of wearers purchase their solutions from the optician where they buy their lenses, the rest buying from supermarkets (20 per cent), the internet (6 per cent) and pharmacies (5 per cent).

But multiples are much more successful at retaining solutions sales than independents (87 per cent vs 49 per cent) and supermarket-based opticians are the least successful (32 per cent).

Where and how often do they have check-ups?

Nearly two in three contact lens wearers (63 per cent) had their last check-up at a multiple/high street chain, compared to 28 per cent at an independent and 9 per cent at a supermarket-based optician.

Customers appear to be more loyal to multiples than independents in terms of buying lenses where they have their check-up (85 per cent vs 72 per cent). Those who use supermarket opticians for check-ups rather than other types of practice are more likely to purchase their lenses online.

The average claimed frequency of contact lens check-ups for all wearers is 12-monthly (every 1.07 years) and, perhaps surprisingly, one in three

wearers say they have a check-up every 6 months (Figure 4).

But there is an average difference of 7-8 months between those who usually buy their lenses through an optician and those who buy over the internet (around 20 months). This is despite those who purchase lenses online acknowledging they should have annual check-ups.

Shopping around to compare the cost of a contact lens check-up is not uncommon (26 per cent), although wearers are more likely to shop around for the cost of lenses.

Are they satisfied with their practitioner and supplier?

Generally consumers are very satisfied with their contact lens practitioner with regard to the quality of lenses, the overall service at initial fitting/check-ups and for convenience (Figure 5). There is less satisfaction with the cost of contact lenses and overall value for money.

Independents perform better than multiples for satisfaction ratings across the board, especially in the areas of contact lens quality and overall service.

But worryingly for all practitioners, levels of satisfaction with buying lenses online are higher still, not just with the cost of their lenses and the convenience of their purchase but also with overall service and lens quality (Figure 6).

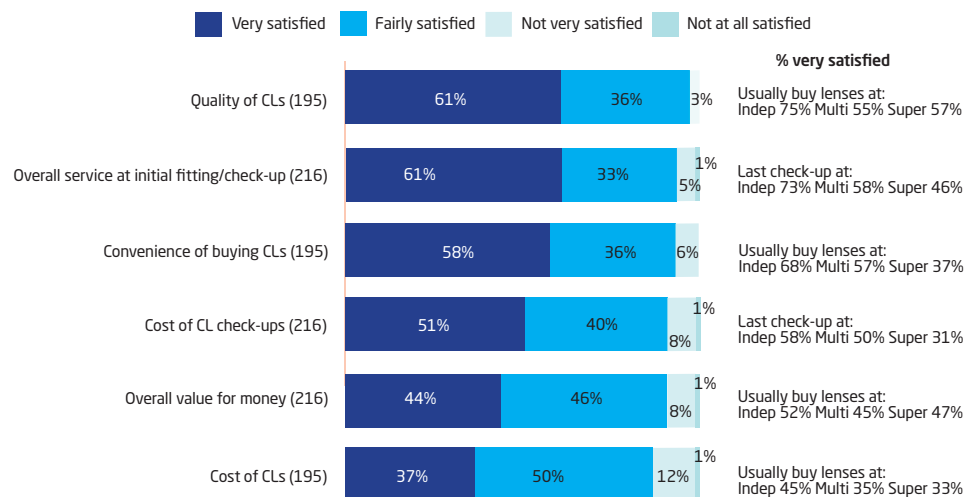
How do they feel about buying lenses online?

Attitudes to buying online provide more encouraging news. Most wearers would prefer to buy their lenses from the same place they have their contact lens check-up (Figure 7). And there are clearly some concerns about the safety and legality of purchasing online.

Brand loyalty seems to be a key driver of contact lens purchase. But a substantial minority also acknowledges that 'buying lenses on the internet is cheaper and easier' and that 'buying lenses on the internet is just like buying any other product'.

Probing reasons for not usually buying online produced some interesting comments, such as 'Would rather just get them from my opticians. They know what they are doing and if there is a problem I can go and see them',

Figure 5 Rating of optician across a number of factors



Base: UK adults 16+ who currently wear CLs (weighted bases shown)

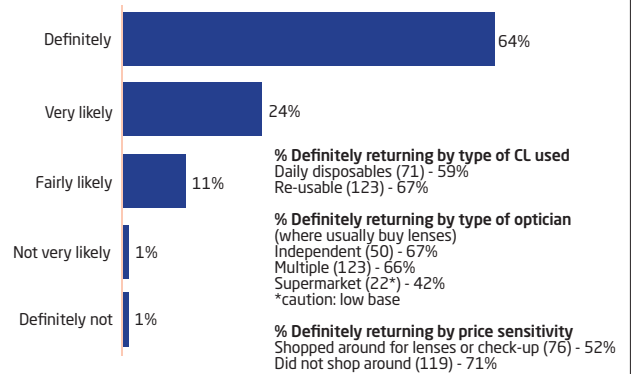


Figure 6 Rating of online providers of CLs across a number of factors



Base: UK adults 16+ who usually buy CLs over the internet n=21 (caution: low base)

Figure 8 Likelihood to return to the same optician to purchase next CLs



Base: UK adults 16+ who usually buy CLs from an optician n=195

Eyes are important so need optician to check lenses are correct, and 'I prefer to purchase from an optician I know and trust'.

Although the number of respondents usually buying over the internet is small, the overriding reason for doing so is price, cited by 91 per cent compared with 41 per cent saying 'more convenient' and 10 per cent 'greater choice of lenses'.

A major concern is that just over half (53 per cent) say they have purchased lenses online without a valid prescription and a substantial proportion (22 per cent) say they have done so frequently.

Are wearers loyal to their contact lens practitioner?

On average, wearers have been to two different opticians since they first starting wearing contact lenses, the largest proportion having used only one (44 per cent) although some have seen three or more (23 per cent).

The likelihood of returning to the same optician for their next lenses

is not a given, with only 64 per cent definitely returning, especially among those who wear daily disposables and those who currently buy from a supermarket optician (Figure 8). By this measure, loyalty to multiples is similar to independents (66 vs 67 per cent).

One factor that might have a bearing on purchasing elsewhere, and on buying without a prescription, is that only three in four wearers were given a copy of their contact lens specification at their last check-up.

Asked whether they are likely to return to the same optician for their next check-up, there is slightly less certainty, with only 60 per cent definitely returning.

Among factors that are likely to attract wearers to change practices are price (33 per cent), location/convenience (6 per cent), better service (4 per cent) or special offers (3 per cent).

One intriguing finding is that a large majority of contact lens wearers (84 per cent) have never discussed buying contact lenses over the internet with

their optician, despite over half having either done so or considered it.

As we will see in Part 2, practitioners could be doing much more to retain their contact lens business, keep wearers in contact lenses and encourage them to make more visits to the practice.

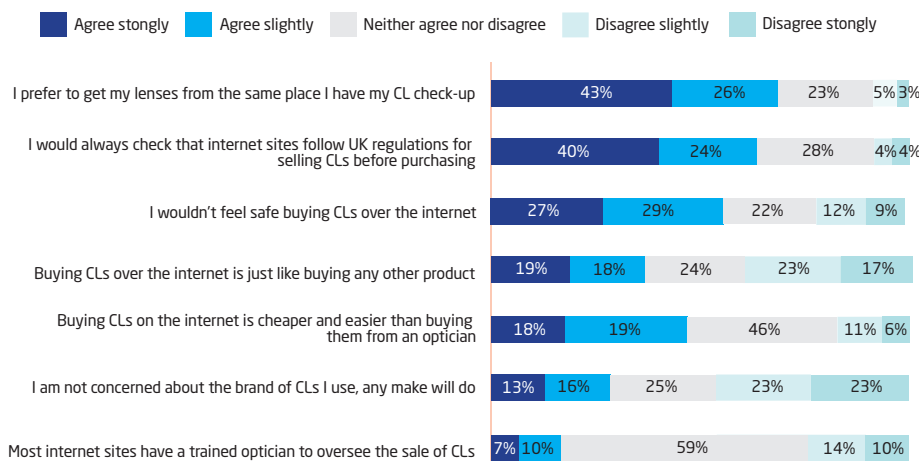
Not surprisingly, pricing structure and patient communication are key, and will be among the issues discussed in our next article. ●

● Thanks to ACLM for financial support for this project and to Kate Burr, senior research manager at Reed Business Insight, for compiling the survey and data analysis

KEY FINDINGS

- About half of contact lens wearers (53%) have either used, considered or researched buying lenses online
- 10% usually buy their lenses over the internet but a further 17% have bought online in the past and a further 26% have considered or researched it
- Daily disposable lens users are more likely to buy over the internet than reusable lens wearers (14% vs 7%)
- 41% of wearers say they are likely to consider buying contact lenses over the internet in future
- The overriding reason for buying lenses online is price (91%)
- Many wearers shop around for lenses (42%) and some compare the price of check-ups (26%)
- On average, those who usually buy online have less frequent check-ups than those who buy from opticians (every 20 months vs 12 months)
- Wearers have used an average of two opticians since they started wearing lenses
- Multiple opticians appear to be much better at retaining solutions sales than independents or supermarket-based opticians

Figure 7 Agreement with statements about buying CLs on the internet



Base: UK adults 16+ who currently wear CLs n=216