



# Who fits contact lenses?



The Association of Contact Lens Manufacturers

In our second article on the findings of the *Optician*/ACLM research, **Alison Ewbank** looks at contact lens recommendation habits and the effects of recent developments on contact lens business

In 2003, when *Optician* and the Association of Contact Lens Manufacturers last conducted research into contact lens provision and recommendation, the commercial climate was very different from what it is today.

Contact lenses had seen strong growth over the previous two years, with the number of wearers increasing by around 20 per cent from 2000 to 2002. Encouraged by the ACLM's Market Growth Initiative, practitioners were discussing contact lenses with more patients and were more likely to initiate this discussion than they had been two years earlier.<sup>1,2</sup> There was an increasing range of products offering greater convenience to prospective wearers, many of whom were already interested in trying contact lenses, often prompted by consumer advertising.

Today the most obvious change is that contact lenses are now more widely available via alternative supply routes. Although contact lens fitting remains the preserve of the registered practitioner, legislation introduced in July 2005 opened up the market to internet and mail order supply. Yet according to the latest ACLM figures, the number of contact lens wearers in the UK has been relatively static in recent years, increasing only 4 per cent in 2008 following a small decrease in 2007. More recently economic downturn and the current recession might be expected to have adversely affected contact lens business.

Have these developments had an impact on practitioners' contact lens recommendation and prescribing habits, and on their contact lens business? And is there sufficient financial incentive in the current climate for the practitioner personally, and for the practice, to recommend contact lenses?

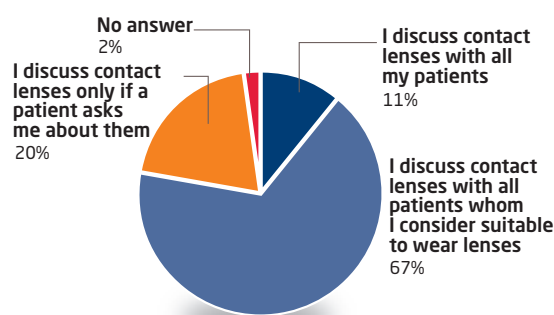
This year, *Optician* and ACLM again set out to find some answers.

## RESULTS

A total of 774 replies were received by the closing date, a 16 per cent



Burger/Phanie/Rex Features



Base: All respondents 2009 (774)

Figure 1 Practitioner approach to discussing contact lenses

TABLE 1

Frequency of discussing contact lenses with patients 2001-2009

	2001	2003	2009
All patients	7%	13%	11%
Those suitable	74%	64%	67%
Only if they ask	19%	22%	20%

response rate. Methodology and demographic data were reported in the first of these two articles, which covered the type and volume of lenses fitted, training, skills and qualifications.<sup>3</sup>

## Recommendation habits

A majority of practitioners (around two thirds) discuss contact lenses with all patients whom they consider suitable to wear them (Figure 1). About one in 10 initiate this discussion with all their patients and one in five only discuss contact lenses if the patient initiates the discussion.

These findings show a slight shift in approach when compared to the results from 2003, and a trend towards to the findings from 2001 before the ACLM launched its Market Growth Initiative (Table 1).

Looking at those personally involved in contact lenses, the findings are similar; a slightly higher proportion (70 per cent) discuss the subject with all whom they consider suitable and a slightly lower proportion (17 per cent) only discuss contact lenses if a patient asks about them.

Almost all practitioners discuss contact lenses with astigmatic and presbyopic patients (Figure 2), although the frequency does vary according to the refractive condition. Practitioners tend to discuss contact lenses only occasionally with presbyopic patients but frequently with astigmatic patients. These findings are in line with those from 2003.

When looking at contact lens practitioners alone, the discussion rate

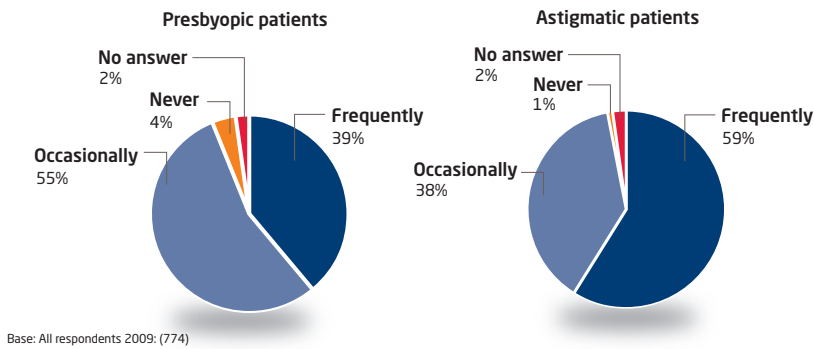


Figure 2 Frequency of discussing contact lenses with presbyopes and astigmats

The most frequently cited change is that they now discuss the importance of aftercare/patient care, named by about one in four (Figure 3). The next most common changes in approach are to explain in-store schemes/benefits, recommend contact lenses to more people, and advise of the benefits of buying lenses from optical practices rather than online. About one in eight say they now recommend contact lenses less than they did before internet supply, or that recommending contact lenses is not cost effective.

Among the contact lens practitioners within this sample, the response was similar; 18 per cent have changed their approach and again the most frequently mentioned change is that the importance of aftercare/patient care is discussed.

In 2003, four out of 10 reported that they had changed their personal approach to contact lens recommendation over the previous two years, since the ACLM's Market Growth Initiative had been launched, with the main change being to discuss/offer contact lenses to a wider range of patients.

Those whose practices offer contact lenses were asked to estimate whether the contact lens business in their practice has changed since the opening up of internet supply. One in five report a decrease in business, around one in six an increase, while six out of 10 feel that business has remained the same (Figure 4). These figures are identical when looking at the sub-group of contact lens practitioners.

Respondents were also asked whether contact lens business has changed since the current economic downturn. About one in six of our total sample report a decrease, while around three quarters feel that contact lens business has remained the same (Figure 4). These figures are also identical when looking at the sub-group of contact lens practitioners.

Asked to estimate what proportion of their practice turnover currently comes from contact lenses, the average figure given is 18 per cent. In 2003, respondents indicated that 19.5 per cent of their turnover came from contact lenses.

**Promoting contact lenses**

More than eight in 10 of those whose practices offer contact lenses use leaflets in their practice for advertising or promotional purposes, by far the

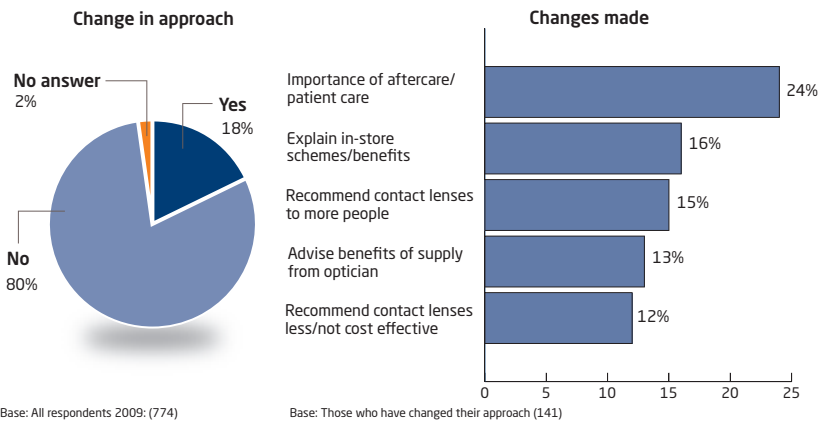


Figure 3 Personal approach to discussing contact lenses with patients since lenses have been widely available over the internet

**TABLE 2**  
Frequency of discussing contact lenses with presbyopes and astigmats 2001-2009

	Presbyopes			Astigmats		
	2001	2003	2009	2001	2003	2009
Frequently	34%	44%	44%	52%	66%	64%
Occasionally	64%	54%	52%	47%	33%	35%
Never	2%	2%	3%	1%	1%	0%

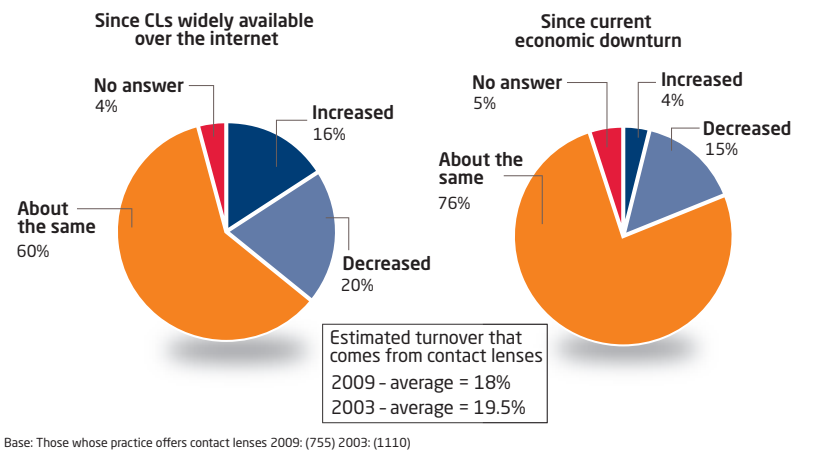
is again similar (99 per cent discuss contact lenses with astigmatic patients and 96 per cent do so with presbyopic patients) although the numbers of those doing so 'frequently' is higher than that among the total sample (64 per cent frequently discuss contact lenses with astigmatic patients and 44 per cent do so frequently with presbyopic patients).

In 2003 there had been a considerable shift away from occasional towards frequent discussions for both presbyopic and astigmatic patients since 2001.

However, this trend has not continued and there has been little further change in discussion habits despite the introduction of new bifocal/multifocal and toric designs (Table 2).

**Effects of internet supply**

Almost one in five of our sample say they have changed their personal approach to discussing contact lenses with patients since lenses have been widely available over the internet, although most say their approach is the same (Figure 3).



Base: Those whose practice offers contact lenses 2009: (755) 2003: (1110)

**Figure 4** Change in contact lens business since lenses widely available over the internet and since the current economic downturn

most popular method listed (Figure 5). Around half use mail shots, while about three in 10 make use of national and/or local advertising. Newsletters are the least popular method of the options listed, used by under a quarter of these respondents.

In terms of the effectiveness of each method, a third believe that leaflets in the practice are the most effective, while around one in six consider national advertising and/or mail shots to have the greatest effect (Figure 5). Local advertising and, in particular, newsletters are seen as less effective.

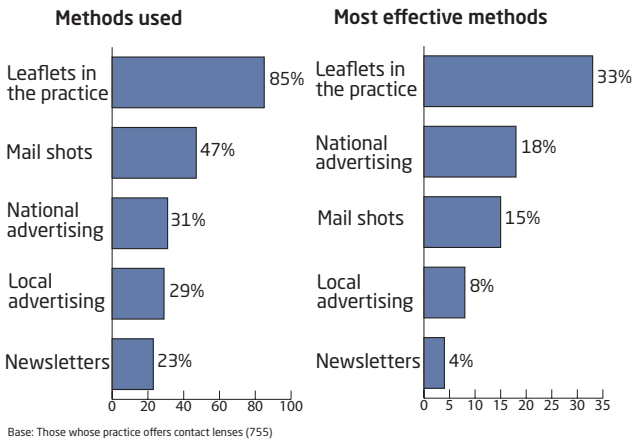
### Incentives to fit CLs

Employed practitioners were asked whether they personally feel there is sufficient financial incentive for them to recommend contact lenses to their patients. About four in 10 feel that there is enough incentive (Figure 6). However, there is a considerable difference between the responses from optometrists and dispensing opticians – 36 per cent of optometrists say they have sufficient incentive compared to 50 per cent of DOs.

Response does not differ dramatically when looking at independents versus multiples – 42 per cent of independents said yes, compared to 40 per cent of multiples. However, differences can be seen when looking at practice type and

**If you are an employed practitioner, do you personally feel there is sufficient financial incentive for you to recommend contact lenses to your patients?**

- Optoms in independents - 43% yes
- Optoms in multiples - 35% yes
- DOs in independents - 40% yes
- DOs in multiples - 55% yes

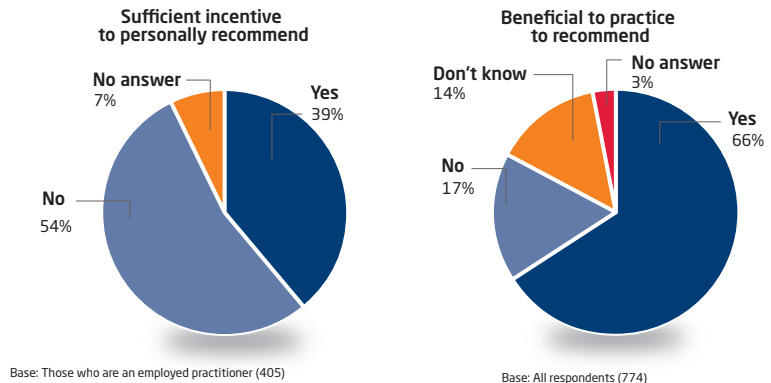


Base: Those whose practice offers contact lenses (755)

**Figure 5** Advertising/promoting contact lenses

professional group together:

All respondents were asked whether, in their estimation, it is financially beneficial to their practice to recommend contact lenses to more patients (Figure 6). Two thirds were in agreement, although again the figure among DOs was higher than that for optometrists (74 per cent compared to 64 per cent).



Base: Those who are an employed practitioner (405)

Base: All respondents (774)

**Figure 6** Financial benefits to recommending contact lenses to patients

### Discussion

So what does our research tell us about the current state of the UK contact lens market and the recent slow-down in growth of numbers of wearers? Our survey found that practitioners' contact lens recommendation habits have shifted slightly since 2003 back towards 2001 findings, prior to the ACLM's Market Growth Initiative. One in five practitioners still only initiate discussion of contact lenses if the patient asks about them, although the 2001 survey showed that nearly half of spectacle wearers would be willing to try contact lenses if their practitioner recommended them. Practitioners tend to discuss contact

lenses only occasionally with presbyopes but frequently with astigmats, and these habits have changed very little since 2003 despite the emergence of improved lens designs.

Fear of losing sales to the internet may be one factor contributing to reluctance among practitioners to introduce contact lenses, but responses here are contradictory. A higher proportion of our sample say they are more likely to recommend contact lenses than before internet supply became widespread compared to those who say they are less

likely to do so or that recommending contact lenses is not cost effective.

Yet when asked if their contact lens business has been affected by internet sales, most say there has been no change, although slightly more (one in five) say business has decreased than say it has gone up.

So far, the recession seems to have had less effect on business than competition from new supply



routes – more than three-quarters of practitioners say contact lens business in their practices is about the same since the economic downturn. That said, the estimated proportion of practice turnover from contact lenses is very slightly down on 2003 at a time when more premium contact lens products than ever are being launched.

A worrying finding is that more than half of all employed practitioners say there is not enough personal financial incentive for them to recommend contact lenses, although two-thirds of practitioners recognise that it would benefit their practices to recommend more patients. DOs employed in multiples are most likely to say there is sufficient incentive and DOs in general see more value to the practice in contact lenses than do optometrists.

It may be that some company incentive schemes favour the immediate gains offered by prescribing spectacles than the higher incremental sales and increased patient loyalty that contact lenses can provide, especially when supplied under a monthly or annual care plan.

The ACLM's Market Growth Initiative focused attention on the economics of contact lens prescribing and research it commissioned at that time from the London Business School demonstrated the lifetime value of contact lenses to practice profitability.

In light of recent market developments, the time may now be right to re-examine the rationale for recommending contact lenses, not just from a clinical standpoint but for business reasons too.

#### Acknowledgements

Thanks to the Association of Contact Lens Manufacturers for sponsoring the survey and to Amanda Claesens and NSM Research for data input and analysis.

#### References

- 1 Hutchison G. Consumer and practitioner attitudes to contact lenses. *Optician*, 2001;221:5795 17-20.
- 2 Ewbank A. Understanding the UK contact lens market. *Optician*, 2003;225:5904, 22-25.
- 3 Ewbank A. Who fits contact lenses? *Optician*, 2009;237:6200, 12-17.

● In next week's *Optician*, Professor Nathan Efron asks 'Why fit contact lenses?' and provides compelling clinical reasons for this mode of correction.

# Time is money

ACLM secretary general **Simon Rodwell** argues that longstanding issues in CL practice continue to hinder market growth



The Association  
of Contact Lens  
Manufacturers

**T**he ACLM is pleased to work with *Optician* on this latest survey of practitioner contact lens fitting habits. As always, statistics in optics tantalisingly show only a part of the story. To record that 98 per cent of practices fit contact lenses sounds excellent, but in a voluntary survey one would not expect many 'non-contact lens' practices to be taking part.

It is disappointing that all the old issues continue to hinder market growth: shortage of time for undergraduate practical training; optometrists staying away from contact lens CET events; failure to keep up with the latest technologies; dearth of contact lens chair time; lack of confidence in personal contact lens fitting skills; unawareness of the financial and customer loyalty benefits which contact lens prescribing bring.

For the average optometrist to spend only 15 per cent of their total patient time on contact lens work is at the centre of the problem. Research among independent practices by Myers La Roche<sup>1</sup> shows that the top quarter of successful practices spend an average of 26 per cent of their time on contact lens work, and this results in a significantly larger percentage of new business, a larger percentage of private patients, greater sales per person and a far higher conversion rate.

This backs up the London Business School (LBS)<sup>2</sup> finding that, given a five-year period to demonstrate 'lifetime value', profit from contact lenses and spectacles far outstrips the instant effect of 'spectacle only' sales. The LBS Excel model, available free from the ACLM website, conclusively supports this view.

Since the 2001 Market Growth Initiative many practices have transformed the way they charge fees and now include an element for professional time. This necessary shift seems, as expected, to have largely negated the pull of the internet and may be reflected in the survey results

which show that over 75 per cent of practices have not been adversely affected by it.

Another key London Business School finding was the need for practice members to act as a team, and to be rewarded for success. Our latest survey shows that more emphasis is required on reward to stimulate more chair time and to get the best from the longer term 'lifetime value' effect.

It is important that practitioners don't just rely on the demographic trend of our ageing population requiring vision correction for practice growth. They should attend those many and varied contact lens CET events, clubs and roadshows, a wide range of which are provided by ACLM members and by the BCLA, and improve their expertise. Doing so will result in significantly fewer dropouts – something like three quarters of which can be prevented with better practitioner product knowledge, fitting and communication skills.

The wide range of ground-breaking new products listed in the *ACLM Contact Lens Year Book 2009*<sup>3</sup> is second to none, and the book is regarded as an invaluable aid to contact lens practitioners.

The London Business School has independently shown that contact lenses are very profitable, and that there is a close link between time spent with the patient on contact lenses and overall practice turnover. Contact lenses complement spectacle sales, rather than working against them, and they enable practitioners to spend more time communicating with patients and getting closer to the Holy Grail of patient loyalty.

Oh, and they're great at helping to weather this recession too. ●

#### References

- 1 Myers La Roche. Market Intelligence Summary, August 2008.
- 2 Ritson M. Which patients are more profitable? *Contact Lens Spectrum*, March 2006.
- 3 ACLM. *ACLM Contact Lens Year Book 2009*. April 2009.