

28 **Optician Index** *October 2005*  
**Unlucky for some**

The 13th anniversary of the OPTICIAN Index is marked with a few positive figures but mostly ones in decline

**O**ctober marks the end of the 13th year of the OPTICIAN Index, perhaps an unlucky year, but certainly one that depicts a general downturn in the optical industry. Some benchmarks have improved over last month and last year, but overall turnover is in decline, following in the wake of depressed figures for eye examinations and dispensing.

Eye examinations are up 4 per cent from September, down 2 per cent from October 2004. The decline is steady at 5 per cent over the year. The proportion of total eye examinations that are NHS tests is down further from last month, but at 63.5 per cent. Results have been higher on average for the last 12 months at 64.7 per cent.

The total volume of dispensing shows negligible change from last month, and is up only 0.5 per cent from last October. Single-vision lenses have improved this month, up 2 per cent, and up 1 per cent from October 2004. Bifocal and trifocal lenses have declined the most of all lens types, down just 1 per cent from September, but down 8 per cent from last year. The average fall over the year is almost 10 per cent. No move for progressives from last month, and up over 1 per cent from last October, but generally results are down by over 10 per cent on average.

Since last October, single vision has taken a greater proportion of the share of the lens market, now at 69.7 per cent compared to 68.6 per cent last year. Bifocal share has fallen from 13.9 per cent, whereas the change for progressive lenses is insignificant.

As reported last month, the total volume of dispensing has fallen by 8 per cent on average over the year. This change is not sudden, the previous year also showed a decline of 7 per cent.

In line with changes in dispensing patterns this month, AR coatings' volume shows little movement from September. Reflection-free coats are up from last October's figure of 134, although on average demonstrate the greatest drop, of almost 17 per cent over the past 12 months.

The percentage of spectacles dispensed with an anti-reflection coating

is currently 45 per cent. It was 42 per cent last October.

This month dispensing rate is up again at almost 69 per cent, compared to 66 per cent. This figure is calculated from total number of eye examinations and total dispensing, and hence does not take into account multiple dispensing.

New contact lens fits are up again this month by 6 per cent. On average there is negligible change in growth, neither positive nor negative.

Total practice turnover results show negligible change from both last month and October 2004's results. Overall, a decline is evident, just over 1 per cent during the last 12 months. Compared to dispensing, the decline in turnover is relatively recent, only being apparent from April 2005. This time last year average growth was positive around 8 per cent.

Turnover per eye examination is down again from last month, £128 compared to £133, though still an improvement on £125 last October.

When comparing your practice with the results it is important to note that all our figures are equated to a 25-day month, so year on year, month on month we can compare equal time periods. October had 26 working days (excluding Sundays and UK Bank holidays).

If a practice would like to contribute to the Index please contact Louise Jarvis on the new telephone number, 01622 851726, to discuss the benefits, no obligation, or by email to [l.jarvis@businessbenchmark.co.uk](mailto:l.jarvis@businessbenchmark.co.uk).

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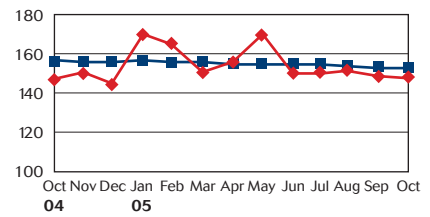


**SOLA**  
OPTICAL

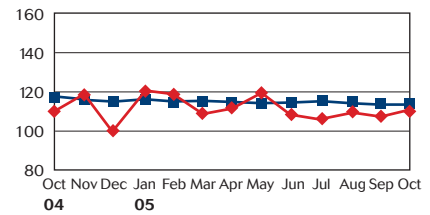
**KEY POINTS**

- ◆ All benchmarks are still in decline
- ◆ While eye examination fees increase, the average £ per minute is the same as last year
- ◆ Turnover per eye examination shows an average increase of 4 per cent over the year, but has consistently fallen over the last three months
- ◆ Dispensing is down on average by 8 per cent
- ◆ Turnover continues on the downward slope, -1 per cent on average over the last 12 months

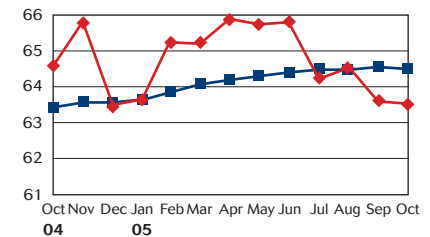
Total turnover



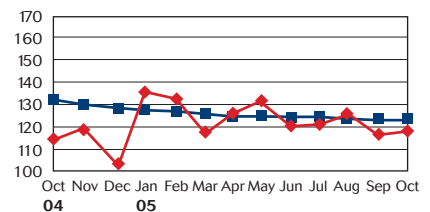
Total eye examinations



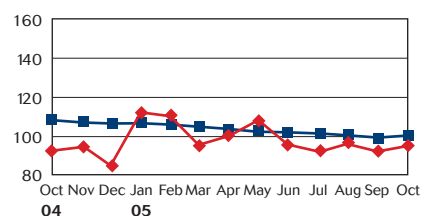
Percentage of NHS tests in total



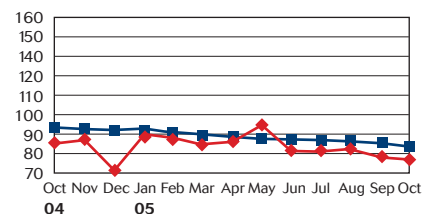
Total spectacles dispensed



Spectacles dispensed with single-vision lenses

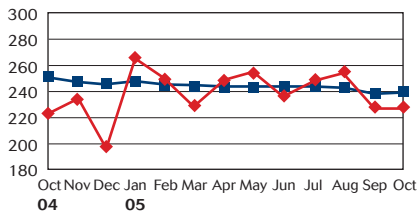


Spectacles dispensed with bifocal lenses

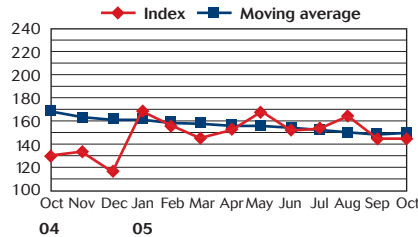


# Optician Index *October 2005*

Spectacles dispensed with progressive lenses



Spectacles dispensed with AR coating

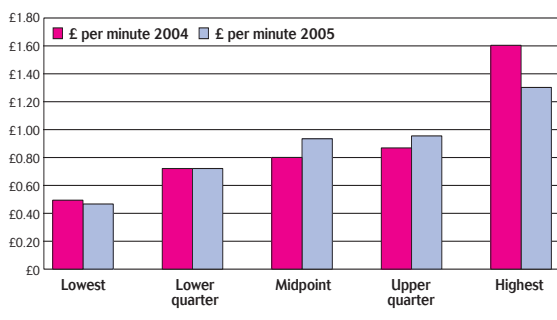


## KEY POINTS

Last month we looked at the range of eye examination fees within the sample. Eye examination fees were seen to have increased by 6.4 per cent on average from September 2004, and the inter-quartile range has increased particularly at the higher end with 50 per cent of fees falling within the range £19 to £26.

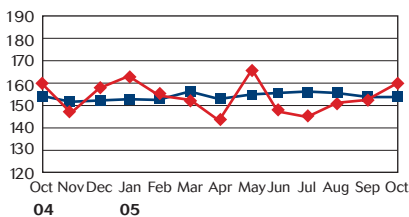
On average, the time allowed for an eye examination has increased very slightly to 28.1 minutes. This is due to the shortest times being increased to 20 minutes as there was no change at the other end of the scale. Some practitioners allow an hour for the standard examination. The most common time period was 30 minutes, then 20 minutes. Using these figures it was possible to calculate a £ per minute spent with patients

Eye examination fees in £ per minute

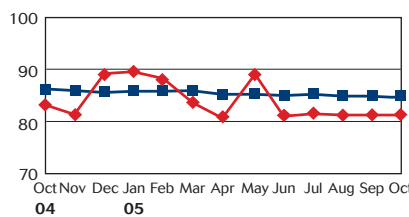


carrying out an eye examination. The graph shows the fees per minute this September compared to 2004. The average fee per minute is £0.85, almost the same as last year £0.84. Mid range is a little higher, from £0.72 to £0.95, but the highest fees are much lower than those in 2004, £1.30 per minute, compared to £1.60 in September 2004. Fee data given are for the week beginning September 5.

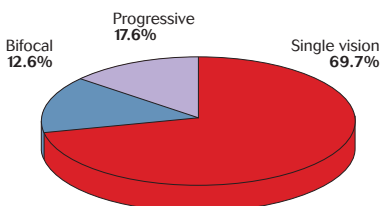
New contact lens fits



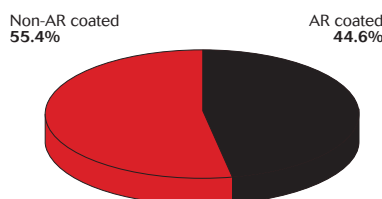
Sales of contact lens solutions



Proportion of spectacles dispensed with different types of lens (October 2005)



Proportion of spectacles dispensed with AR coating (October 2005)



# Glaucoma calculator

OPTICIAN reports on one of the interesting presentations at this month's American Academy of Ophthalmology AGM

A NEW 'glaucoma calculator' designed to help physicians determine the risk of patients with ocular hypertension developing hypertension was unveiled at the recent American Academy of Ophthalmology Annual Meeting.

The calculator, similar to the predictive risk factor tools used for years in heart disease, allows eye specialists to input the various individual risk-factors of a patient into a simple slide rule, then calculate the risk of the patient developing glaucoma within a five-year period.

The individual risks are based on data collected from the 'Ocular Hypertension Treatment (OHT) Study', which identified key patient risk factors predictive of disease progression from ocular hypertension to glaucoma.

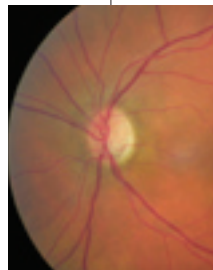
'This aids physicians in establishing the risk of an individual patient in developing glaucoma,' said Felipe Medeiros, MD, an assistant professor of ophthalmology at the University of California, San Diego, during a workshop.

'Assessing the risk allows eye specialists to focus on the patients who are at moderate to high risk of developing glaucoma. These patients are the ones who will most benefit from treatment.'

The calculator, which resembles a slide rule, allows a physician to plug in the patient's age, intraocular pressure, central corneal thickness, vertical cup/disc ratio, and higher visual field pattern standard deviation values. The calculator then predicts the patient's five-year risk for future development of glaucoma.

In the DIGS study, 31 patients (25 per cent) with a moderate to high risk of glaucoma developed glaucoma during follow-up. The average probability of glaucoma conversion at five years was almost 12 per cent, the researchers reported.

Although the OHT study provided a better understanding of the relevant risk factors involved in the progression to glaucoma, physicians were still faced with the challenge of integrating these factors for a global assessment of the risk for an individual patient, Medeiros said.



A patient's five-year risk of developing glaucoma is predicted